# How to Set Up
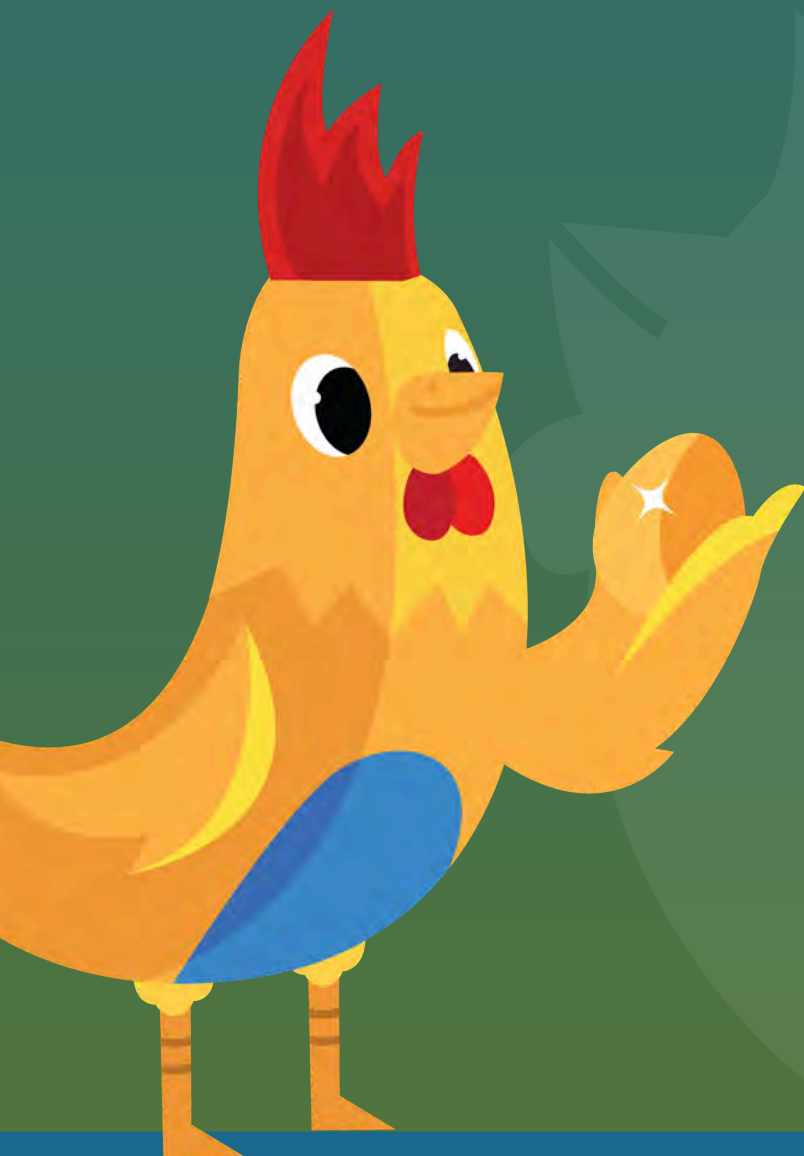# Paid Memberships Pro

### Complete Setup in 12 Steps

**Paid Memberships Pro**

# Table of Contents

# Introduction

Paid Memberships Pro is a WordPress membership plugin and support community for membership site creators. PMPro's rich features allow you to add a new revenue source to your existing blog, website, or business or create an entirely new membership business. It's flexible enough to fit the needs of almost all online and offline businesses, with a diverse library of Add Ons, integrations, and options for customization.

## Prerequisites: Planning Your Membership Site

PMPro is designed entirely around your members, so spend some time thinking about what you want your membership experience to be. Setup goes smoothly when you have a very clear vision of your dream membership site—and what it will be like for your members.

**Here are a few questions to get you started:**
- How many membership levels will you have?
- What will members at different levels have access to?
- How much are you going to charge for each level?

## About Payment Gateways

We recommend choosing your payment gateway and creating your payment gateway account prior to beginning the setup process. This will ensure that you have your API keys or gateway username and password handy while going through the steps.

Visit our Payment Gateways documentation to learn more about which gateways integrate with Paid Memberships Pro. There are also a few gateway integrations not maintained by Paid Memberships Pro listed here.

## What kind of site are we talking about?

This guide will walk you through installing and configuring Paid Memberships Pro for your WordPress website.

Deviating from the recommendations here may require extra work beyond the scope of this document. If you need support, you can find it in the [Paid Memberships Pro premium support area](#).

## What will I need, and what will it cost?

Paid Memberships Pro is a **100% free open source plugin**. We offer a free plan for access to documentation and our free Add Ons, plus two premium plans for access to technical support and automatic installs and updates for over 70 feature-enhancing Add Ons. [Choose a Plan and View Pricing »](#)

# Step 1. Install Paid Memberships Pro

The first step in this guide is to download and install the Paid Memberships Pro plugin.

## Download Paid Memberships Pro

1. Visit our documentation page to [access your preferred download package](#).

   a. You can upload the .zip file of Paid Memberships Pro via the **Plugins** > **Add New** > **Upload** plugin screen.

   b. Or, upload the unzipped 'paid-memberships-pro' plugin folder to the /wp-content/plugins/ folder of your site's web hosting environment.

2. Once the plugin is installed in your WordPress site, navigate to the Plugins screen in the WordPress admin.

3. Locate "Paid Memberships Pro" in the list of plugins.

4. Click "**Activate**" to activate the plugin.

# Step 2. Complete the Setup Wizard

The Setup Wizard guides you through the basic configuration of Paid Memberships Pro, including setting up your first free and paid level (optional) and reviewing advanced settings related to content filters and spam protection.

If you choose to skip the Setup Wizard, continue on to steps three through twelve in this document to go through the individual setup steps.

## Welcome

Identify the main purpose of your new membership site and set up the basic structure.

- **What type of membership site are you creating?** Select the primary type of site you're building. This answer helps later steps in the wizard show you the top Add Ons and settings that benefit your type of site.
- **Generate required plugin pages.** Check this box to auto-generate the membership pages and prefill them with required frontend content. You can edit these pages later as needed.
- **Collecting payments.** Check the box if any of your membership levels are paid. If you are setting up a free membership site only, leave this box unchecked. You'll connect your payment gateway in the next step of the Setup Wizard or later in Payment Gateway Settings.
- **Support license key.** [PMPro is 100% free](#) and open source. There are no limits on the free core plugin, including all built-in payment gateways. A license key is not required. If you are already a premium PMPro member, input your license key in this step. [View pricing »](#)

## Payments

Choose a default currency for your payments and choose to enable Stripe or another payment gateway later.

If you are setting up a free membership site, this step is automatically skipped.

- **Select the currency for your membership site.** This setting controls the currency your pricing is displayed in. Your payment gateway, however, can accept many worldwide currencies and will automatically convert payments for you.
- **Configure Your Payment Gateway.** We recommend using the Stripe payment gateway for your membership site. If you select Stripe, the setup wizard will automatically connect to your gateway at the end of the setup process.
  - If you do not already have a Stripe account and do not want to set one up at this time, or do not want to use Stripe as your payment gateway, please select "**Other/Setup Later**" instead.

If you choose to set up your gateway later, see step five for instructions on how to configure your Payment Gateway Settings.

## Memberships

Create a basic Free and Paid Membership Level. Both of these are optional steps in the setup wizard.

- **Enter the name of your Free or Paid membership level.** We have a companion guide on how to name your membership levels if you aren't sure what names to use.
- **For your paid level, set the subscription price per period.** Click here for more documentation on level pricing or check out our post on how to price a membership site.

If you need to add more levels after completing the wizard, see step 3 in this guide.

## Advanced

Configure the advanced settings for your membership site.

- **Filter Searches and Archives**: Optionally hide members-only content from appearing in an archive view (category, tag, author, etc.) or in search results.
- **Show excerpts to non-members?**: WordPress auto-generates an excerpt from the first 55 words in your post. Select whether to show or hide excerpts to logged out visitors or non-members. It's a good idea to show excerpts on member pages as a

teaser for new members to sign up and keep reading or for SEO to index a portion of your content.

- **Enable Spam Protection:** It is highly recommended that you enable this as a built-in checkout feature. This setting blocks bad users from repeatedly attempting checkout from the same IP address. After setup, we also recommend setting up other Security Settings by following step 6 in  this guide. This includes methods to prevent spam checkouts, card testing, and other website attacks.
- **Enable Tracking?**: Optionally enable usage tracking for PMPro. This tracking feature sends us information about the type of membership site you are building and how you have configured Paid Memberships Pro on your site. By choosing to share this data, you're helping us make PMPro better for everyone. Understanding how people are using PMPro helps us add meaningful features, write better documentation, and makes PMPro a more useful open source platform.

See step 11 for more information on the Advanced Settings.

**You're all set!**
You've completed the basic setup steps and your site can accept free or paid membership checkouts.

**So what's next?**
The Setup Wizard ends with recommended Add Ons based on what kind of membership site you chose in the welcome step. Keep reading this setup guide to learn additional information about PMPro Settings. Browse our [Add Ons](#) for ways to extend your membership site and integrate with other platforms.

# Step 3. Add a New or Additional Membership Level(s)

On the dashboard, go to **Memberships** > **Settings** and select **Levels**. From here you can create a new level or level group or edit existing levels and level groups.

## Set Up Membership Level Groups

With Paid Memberships Pro, a single user can hold multiple membership levels at one time. For this reason, you must assign levels to Level Groups. Level Groups are used to define how different levels relate to each other.

Each Level Group has specific permissions related to the levels within, specifically:

- Users can only **choose one level** from this group (the classic tiered membership access), or
- Users can **choose multiple levels** from this group (for "a la carte" or Add On memberships that charge a one-time payment or set up a separate recurring subscription).

### Add a Level Group

1. From the WordPress admin, navigate to **Memberships** > **Settings** > and select **Levels**.
2. Click **+ Add New Group.**
3. **Name Your Group:** Assign a name to your level group. This name is shown on your Membership Levels page (if you are using the default membership levels page shortcode or block).
4. **Enable Multiple Selections Per Member:** Check the box "Allow users to choose multiple levels from this group" if you want to allow members to hold multiple membership levels simultaneously within the same group. If your level group is for tiers of access, do not check this box.
5. **Save Settings**.

## Select a Membership Level Template

Paid Memberships Pro has level settings for almost any type of level you can imagine. The plugin includes level templates for the most common types of levels our user research revealed including:

- **Free:** no payment, never expires

- **One Time:** one initial payment at checkout with expiration

- **Monthly or Annual:** recurring subscription that charges the same amount at checkout and per period until the user cancels

- **Lifetime:** one initial payment at checkout with no expiration

- **Trial:** a free period of membership that begins charging the recurring membership after one period

- **Advanced:** the complete Add Membership Level screen with all options expanded
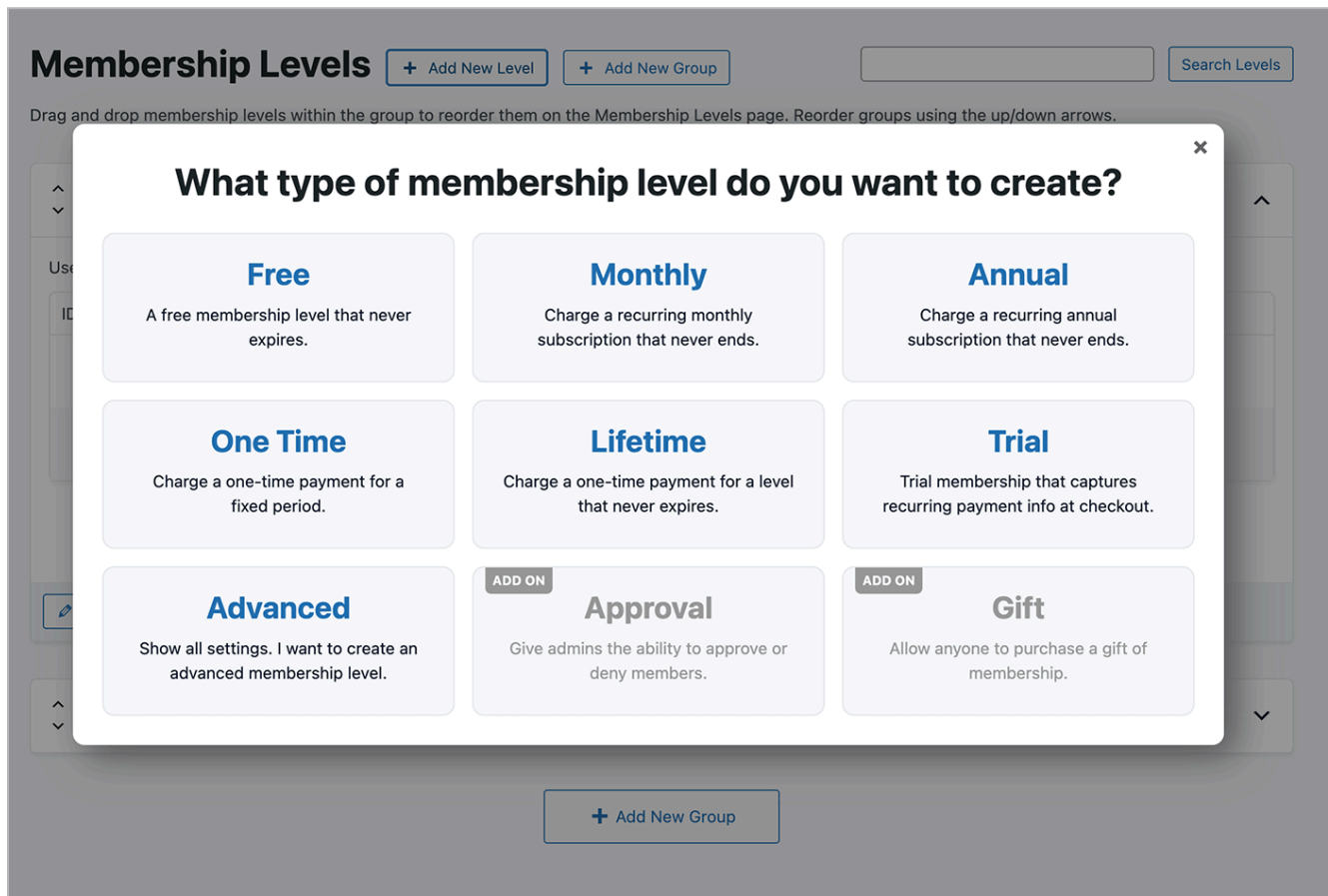


When creating a new level, select a template from the list that best fits the type of level you need.

Note that even though you may have chosen a template to set up your level, you can still access every individual level setting if, for example, you decide to change your one time payment level to recurring later.

# Membership Level Settings

Depending on the type of level template that was selected, this screen will have slightly different settings activated. For example, selecting the "Advanced" level template will show you all settings, including expiration settings and more.

## General Information

- **Name:** The name of your Membership level (public).

- **Group**: Assign the Membership Level to a Level Group.

- **Description:** Optional content shown on the checkout page.

- **Confirmation Message:** Optional content shown on the checkout confirmation page and can be included in the confirmation email.

## Billing Details

- **Initial Payment:** This is what is charged at checkout. (e.g. $10.)

- **Recurring Subscription:** Check if your level has a recurring payment

- **Billing Amount:** The amount to be billed one cycle (day(s), week(s), month(s), year(s)) after the initial payment.

## Advanced Level Billing Settings

These are the less-used settings that you may need to create a more complex level.

- **Billing Cycle Limit:** The total number of recurring billing cycles for this level, including the trial period (if applicable) but not including the initial payment. Set to zero if membership should charge subscription payments indefinitely. At the end of the last cycle, billing will stop, but the user will still have their membership level access unless you also set an expiration below.

- **Custom Trial:** Check if your level has a custom trial period. (Optional; Trial Payment and Trial Period)

- **Trial Billing Amount:** The amount (can be zero for free trial) and number of cycles to be billed (day(s), week(s), month(s), year(s)) after the initial payment.

**Expiration Settings**

- **Membership Expiration:** Check this to set when membership access expires.

- **Expires In:** Set the duration of membership access. Note that the member's recurring subscription (if any) will be canceled when the membership expires.

**Content Settings**

- **Categories:** Select categories to bulk protect posts. You can control whether non-members see posts in archives or shown excerpts using this guide. If you have any Categories that should be locked down for members, you can check them off at the bottom of the edit level page.

- **Single Posts:** Add or edit a single post to protect it.

- **Single Pages:** Add or edit a single page to protect it.

- **Other Content Types:** PMPro can protect other content types such as a [Custom Post Type](), [Course](), [Community](), [Directory](), [Podcast](), and more.

**Other Settings**

- **Disable New Signups:** Disables new signups / checkouts and hides the level from default "Membership Levels" page

Other settings may also appear in this section if you are using any of our Add Ons or third-party integrations.

Important: At least one membership level must be open to signups ("Allow Signups" = Yes) or your customers will be redirected to your membership levels page when they try to register or checkout.

## Add New Membership Level

**General Information** ⌄

**Billing Details** ⌃

Set the member pricing for this level. The initial payment is collected immediately at checkout. Recurring payments, if applicable, begin one cycle after the initial payment. Changing the level price only applies to new members and does not affect existing members of this level.

Optional: Allow more customizable trial periods and renewal dates using the Subscription Delays Add On.

**Initial Payment**  $ | 25 |

The initial amount collected at registration.

**Recurring Subscription**  ☑ Check if this level has a recurring subscription payment.

**Billing Amount**  $ | 25 | per | 1 | Month(s) ⌄

The amount to be billed one cycle after the initial payment.

**Billing Cycle Limit**  [ ]

The **total** number of recurring billing cycles for this level, including the trial period (if applicable) but not including the initial payment. Set to zero if membership is indefinite.

**Custom Trial**  ☐ Check to add a custom trial period.
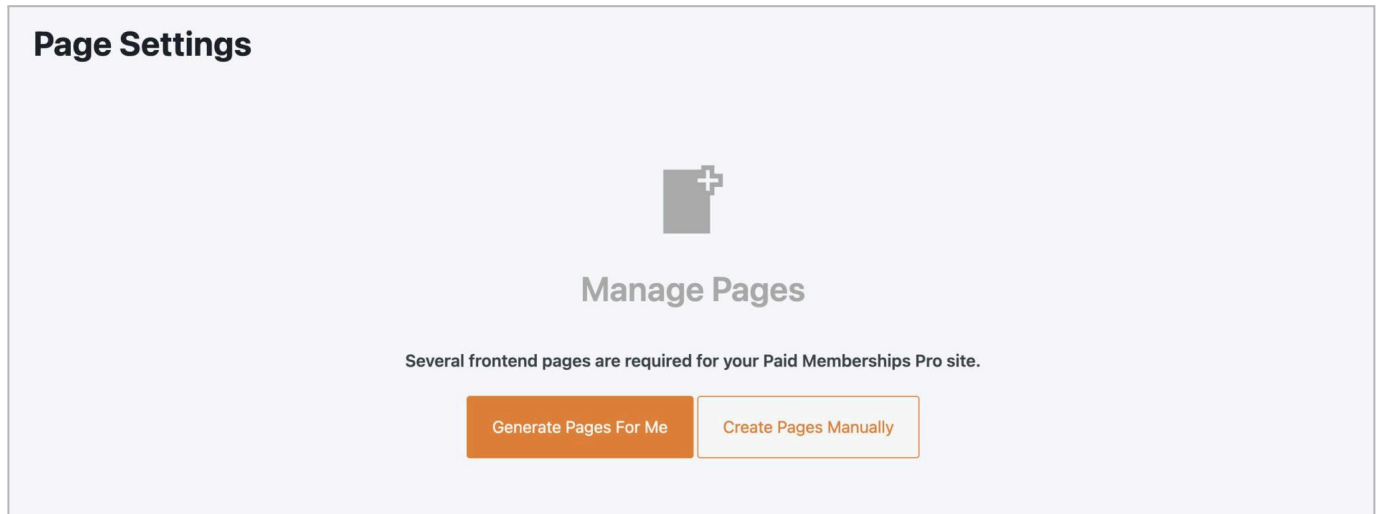
# Step 4. Set Up Frontend Pages

If you generated frontend pages within the setup wizard, this step is already complete for you.

From the WordPress dashboard, go to **Memberships** > **Settings** and select **Pages**. The next step is to set up some pages that Paid Memberships Pro needs to get the job done.

Paid Memberships Pro can generate these pages for you. Click the link that says **"Generate Pages for Me"**. This step sets the WordPress pages assigned to each required Paid

Memberships Pro page. For information on how to customize these pages, go to:

https://www.paidmembershipspro.com/documentation/frontend-pages/

*Screenshot: Memberships > General Pages*

**Page Settings**

**Manage Pages**

Several frontend pages are required for your Paid Memberships Pro site.

Generate Pages For Me     Create Pages Manually

## Page Settings

Manage the WordPress pages assigned to each required Paid Memberships Pro page.

### Primary Membership Page Settings ︿

Click here for documentation on how to customize the content of frontend pages beyond the block or shortcode settings.

**Account Page**  [ Membership Account ▾ ] [ edit page ] [ view page ]
Include the shortcode [pmpro_account] or the Membership Account block.

**Billing Information Page**  [ Membership Billing ▾ ] [ edit page ] [ view page ]
Include the shortcode [pmpro_billing] or the Membership Billing block.

**Cancel Page**  [ Membership Cancel ▾ ] [ edit page ] [ view page ]
Include the shortcode [pmpro_cancel] or the Membership Cancel block.

**Checkout Page**  [ Membership Checkout ▾ ] [ edit page ] [ view page ]
Include the shortcode [pmpro_checkout] or the Membership Checkout block.

**Confirmation Page**  [ Membership Confirmation ▾ ] [ edit page ] [ view page ]
Include the shortcode [pmpro_confirmation] or the Membership Confirmation block.

**Levels Page**  [ Membership Levels ▾ ] [ edit page ] [ view page ]
Include the shortcode [pmpro_levels] or the Membership Levels block.

# Step 5. Payment Gateway Settings

From the WordPress dashboard, go to **Memberships** > **Settings** and select **Payment Gateway**. From here you can set up your payment gateway using the following settings:

1. **Payment Gateway:** Select one of the payment options available in the dropdown field. In the tutorial, we've chosen Stripe, which is free and quick to set up. Make sure to set up your gateway account before you do this step.

   a. Gateway setup varies based on which payment gateway you have chosen. Refer to the documentation for your chosen payment gateway as you complete this section: https://www.paidmembershipspro.com/gateway/

b.  You may see additional fields on this screen, such as a webhook or an IPN url you might need to reference for your gateway. Documentation on how to find and configure these settings can be found in our gateway documentation.

2.  **Gateway Environment:** Choose the **test or live gateway**. For this tutorial, we've selected Sandbox/Testing, but typically you want to set this to "Live".

3.  **Complete the fields for your chosen gateway:** For Stripe, click the "Connect with Stripe" button to automatically authenticate your site with your Stripe account. Other payment methods will have different processes.

4.  **Currency** & **Sales Tax:** Select your website currency in the dropdown field. For this example, we are not charging Sales Tax. **Always check with your accountant or your regional tax office** to see if tax is required and the tax rate for your memberships. Refer to our guide on [methods to calculate and apply taxes](#) if the base tax settings will not work for your needs.

5.  **Save Settings.**

*Screenshot: Memberships > Settings > Payment Gateways*

# Step 6. Security Settings

The **Memberships** > **Settings** > **Security** admin page is a central hub for all security-related settings in PMPro.

## Spam Protection

To protect your site from spam, it's recommended to set up several spam protection methods. Below are the options you can configure:

- **Akismet Integration:** Use the Akismet plugin to prevent spam signups during checkout. This free plugin, typically pre-installed with WordPress, filters checkout form submissions to identify and block spammy behavior.
- **IP Address Blocking:** Enable this setting to block IP addresses that repeatedly attempt checkout, particularly useful for on-site checkouts. If more than 10 payment failures occur within 15 minutes, the system blocks further attempts from that IP, helping prevent fraudulent transactions like card testing.
- **reCAPTCHA or Cloudflare Turnstile:** Choose either Google reCAPTCHA or Cloudflare Turnstile to verify that users are human. These tools add hidden or visible challenges (e.g., selecting images) to the checkout process, deterring automated signups.

## HTTPS Settings

Ensure that your site uses HTTPS to secure communication:

- **Force SSL:** Decide whether to force SSL across your site. This is recommended to ensure all communications are encrypted.
  - If your site URL starts with https://, this option ensures your entire site is served over HTTPS. If your site experiences redirect loops, you can enable JavaScript redirects.
- **Extra HTTPS URL Filter:** Pass all generated HTML through a URL filter to add HTTPS to URLs used on secure pages.

- Enable this if you're using SSL and encountering warnings on checkout pages.

## DNS Firewall

DNS firewalls like Cloudflare provide distributed denial of service (DDoS) protection, improve page speed by delivering content via a global CDN, and include a web application firewall to block malicious traffic and vulnerabilities.

- **Cloudflare:** Confirms if the free Cloudflare DNS firewall is active or not detected.

## WordPress Security Plugins

Security plugins are designed to add additional layers of protection for your WordPress site.

This section detects whether your site is using one of our recommended WordPress Security plugins. If your site is running multiple security plugins, please consider deactivating one to avoid conflicts and improve site performance.

- **MalCare:** Our most recommended security plugin. MalCare offers real-time threat detection, firewalls, and performance optimization. If not installed, you can click to install it.
- **Other Security Plugins:** This page detects if you are using other security plugins including Wordfence and Solid Security.

## Step 7. Email Settings

From the WordPress dashboard, go to **Memberships** > **Settings** and select **Email Settings**.

From here you can review default email settings and adjust fields like the **From Email** & **From Name**. Use these fields to change the email address and sender name WordPress uses to send email communications to your members.

# Email Settings

## Send Emails From  ⌃

By default, system generated emails are sent from **wordpress@yourdomain.com**. You can update this from address using the fields below.

**From Email:**  info@paidmembershipspro.com

**From Name:**  Demo Site

**Only Filter PMPro Emails?:**  ☐ If unchecked, all emails from "WordPress <wordpress@pmpro-initial-setup-tutorial.local>" will be filtered to use the above settings.

## Email Deliverability  ⌄

## Other Email Settings  ⌃

**Send members emails:**  ☐ Default WP notification email.
Recommended: Leave unchecked. Members will still get an email confirmation from PMPro after checkout.

Save All Settings

# Step 8. Email Templates

From the WordPress dashboard, go to **Memberships** > **Settings** and select **Email Templates**. By default, this editor includes all emails sent by the core plugin.

1. Select a template to [edit any email included in Paid Memberships Pro](#). Use this screen to modify any template's subject line and body text for your needs.

2. A list of included variables (such as `!!name!!` or `!!user_email!!`) is provided for building your templates.

3. You can also disable any built-in email by checking the "Emails with this template will not be sent" option.

4. Always save settings for each template before moving on to edit another template.

*Screenshot: Memberships > Settings > Email Templates*

# Step 9. User Fields

User Fields is a robust feature in Paid Memberships Pro to create custom profile fields for your membership site. Fields can be collected at membership checkout, on the user's profile or for administrative view-only.

**User Fields can be created in two key ways:**

- Navigate to **Memberships** > **Settings** > and select **User Fields** to create field groups and individual fields.
- Or, create and extend your user fields via custom code.

The most common field types and requirements are available via the settings page. Developers can explore our [documentation on coding fields](#) for more complex needs, such as custom field saving functions, storing fields in a user taxonomy, or pre-populating field dropdowns with custom data arrays.

## How to Add a Field Group

Field Groups allow you to organize user fields with similar settings like 'show at checkout' and 'show on profile'. Groups can be shown at checkout, for users on the frontend user profile page, or be visible and editable for admins only.

1. Navigate to **Memberships** > **Settings** > **User Fields** in the WordPress admin.

2. Edit the default field group or create a new field group by clicking the "**+ Add Field Group**" button.

3. Click "**Save All Changes**" to save your progress.

## How to Add Custom User Fields

1. Navigate to **Memberships** > **Settings** > **User Fields** in the WordPress admin to create and manage custom user fields.

2. Create or edit fields in the default field group or create a new field group for your user fields.

3. Click the "**+ Add Field**" button to insert a new field. Or, toggle to expand an existing field to modify settings.

4. Click "**Save All Changes**" to save your progress.

For a full list of field settings and attributes, visit our User Fields documentation page: https://www.paidmembershipspro.com/documentation/user-fields/create-fields/

*Screenshot: Memberships > Settings > User Fields*

# Step 10. Design Settings

From the WordPress dashboard, go to **Memberships** > **Settings** and select **Design**. This screen allows you to customize the visual styles and color schemes for PMPro's frontend membership pages.

## Style Variations

The first section in Design Settings offers your choice of style variation for customizing membership pages. The available variations are:

- **Default (Recommended):** A light variation with rounded cards and soft shadows.
- **High Contrast:** Crisp borders and high contrast colors for better visibility.
- **Minimal**: A minimalistic design that primarily relies on your theme's styles.

## Color Settings

This section includes three customizable color options:

- **Base Color:** The primary background color of sections and form fields.
- **Contrast Color:** The color for elements that need to stand out against the base.
- **Accent Color:** The highlight or accent color used for buttons and links.

## How to Update Design Settings

1. Navigate to **Memberships** > **Settings** > **Design**.
2. **Adjust the style variation** by selecting the desired option.
3. **Customize the colors** using the color pickers provided.
4. Click the "**Save Settings**" button to apply your changes.

Upon saving, the settings are stored in the WordPress database and immediately reflected on your frontend membership pages. If you are using a caching plugin or your host offers caching, you may need to rebuild the cache to see these changes on the frontend.

## Step 11. Advanced Settings

From the WordPress dashboard, go to **Memberships** > **Settings** and select **Advanced**. This screen controls other customizations to your Paid Memberships Pro site. You'll also find some settings here for any Add Ons that support advanced settings.

**Restrict Dashboard Access**

- **WordPress Dashboard:** Choose whether to block all users with the Subscriber role from accessing the Dashboard.

- **WordPress Toolbar:** Choose to hide the Toolbar from all users with the Subscriber role.

## Content Settings

- **Filter searches and archives?** Optionally hide members-only content from appearing in an archive view (category, tag, author, etc.) or in search results.

- **Show Excerpts to Non-Members?** Select whether to show or hide excerpts to logged out visitors or non-members. It's a good idea to show excerpts on member pages as a teaser for new members to sign up and keep reading or for SEO to index a portion of your content.

## Checkout Settings

- **Require Terms of Service on signups?** If you have a Terms of Service page on your site, select it in the dropdown here. This will add a link to your TOS from the checkout page and requires the registrant to accept your terms prior to registration.

## Communication Settings

- **Notifications:** Notifications are occasionally shown on the Paid Memberships Pro settings pages. You can set this to show all notifications or only security notifications.

- **Activity Email Frequency:** Specify how often you would like to receive sales and revenue updates from this site to the administration email address. Read more about the Admin Activity Email here.

## Other Settings

- **Hide Ads From Members?** If you are running ads on your site, you can hide them for members (note that this requires additional configuration). Read more about hiding advertising from members here.

- **Enable Tracking:** Sharing non-sensitive membership site data helps us analyze how our plugin is meeting your needs and identify opportunities to improve. Read about what usage is tracked here: Paid Memberships Pro Usage Tracking.

- **Uninstall PMPro on deletion?** Choose whether deleting the Paid Memberships Pro plugin will also delete all database tables used by the plugin. Deleting all data will also cancel all memberships and active subscriptions at the connected gateway.

*Screenshot: Memberships > Settings > Advanced*

## Advanced Settings

### Restrict Dashboard Access ⌃

| | |
|---|---|
| WordPress Dashboard | ☑ Block all users with the Subscriber role from accessing the Dashboard. |
| WordPress Toolbar | ☑ Hide the Toolbar from all users with the Subscriber role. |

### Content Settings ⌃

| | |
|---|---|
| Filter searches and archives? | Yes - Only members will see restricted posts/pages in searches and archives. ⌄ |
| Show Excerpts to Non-Members? | No - Hide excerpts. ⌄ |

### Communication Settings ⌄

### Other Settings ⌄

# Step 12. You're Done—Now Go Test Your Site!

After you have successfully set up the plugin, test the experience from your user's perspective.

1. Navigate to a members-only piece of content, try a blog post in a locked-down category.

2. Click on the "**View Membership Levels**" link.

3. From the Membership Levels page, select a level to checkout.

4. After successful checkout, return to your members-only piece of content and enjoy!

**A Sample Membership Site Pricing Page Built With Paid Memberships Pro**
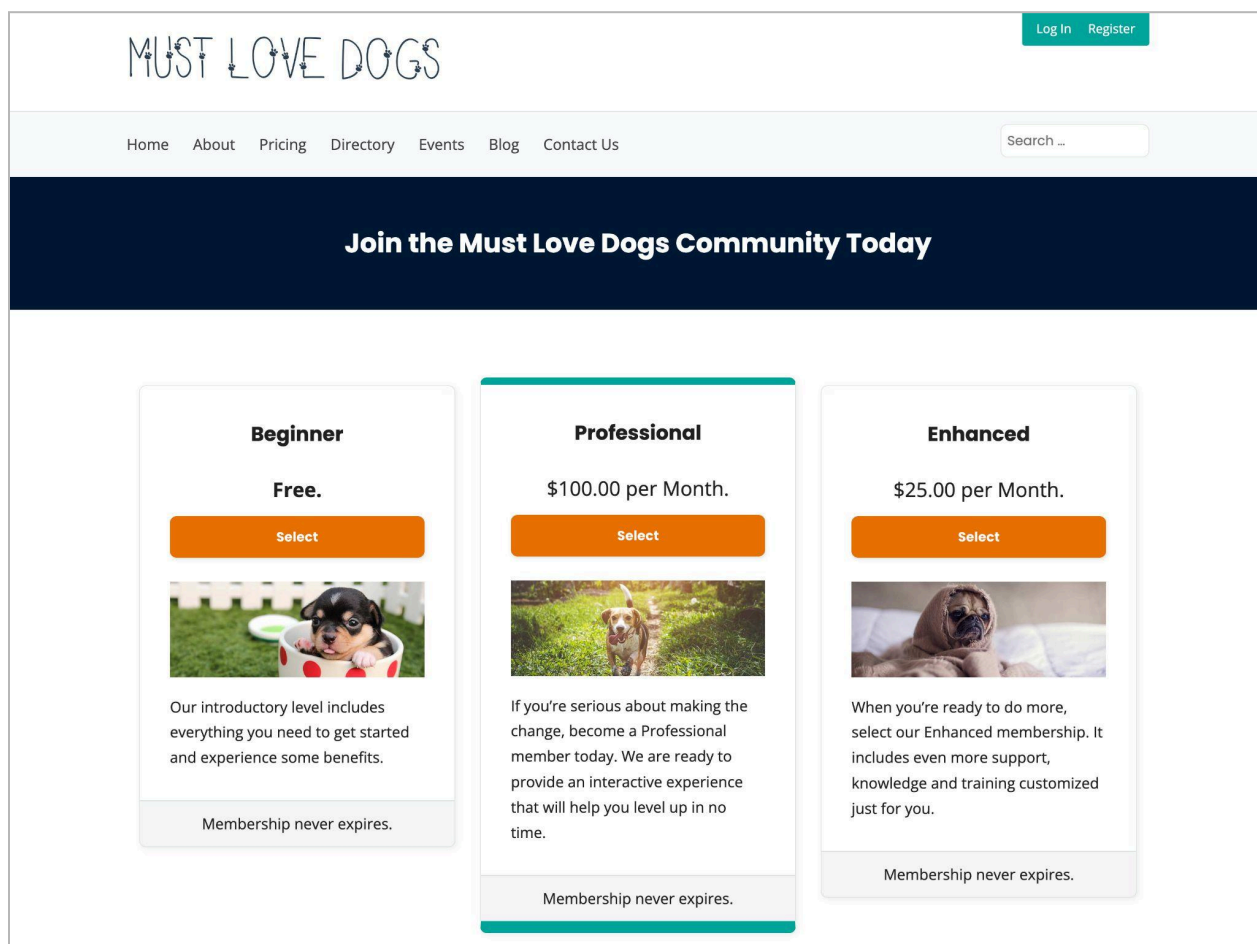
# [More Resources]

Take your membership site to the next level with these additional links:

★ Learn how to [get support for PMPro](#).

★ [Read our blog](#) to help you design, grow, and optimize your membership site. [Sign up for blog updates](#) to stay in the loop.

★ Access the Initial Plugin Setup [documentation](#) with [video tutorials](#) for each step from this guide.

★ Starting a brand new WordPress site? If you need hosting, [click here for our web hosting recommendations](#).

★ Are you moving from another plugin to PMPro? We have [migration guides](#).

★ Check our [event calendar with loads of free events](#) designed to help you grow your membership business

★ Explore [Free](#), [Standard](#), and [Plus](#) Add Ons (upgrade required).

★ Browse our library of [over 300 code recipes for advanced customization](#).

★ Need a developer to help you customize your membership site? [Reach out to trusted developers with deep experience extending PMPro](#).

★ Imitation is the best form of flattery. Check out these [case studies to see how other creators have built a membership business](#) using PMPro.

Cheers to your new membership business!

~ *Kim Coleman & the PMPro Team*

**Paid Memberships Pro**

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