Creating a Membership – Manually Method 2

To manually create a new membership from scratch is a multi-step process. The following assumes that we have the application paperwork and a check.

Within the WordPress Dashboard, select Users/Add New:

| 🔞 🖀 ocws 📀 14 | 🏓 0 🕂 New 🛗 Events | | | | | Howdy, Stacey |
|--|--|---|---|----------------------------|--------------------------------------|---------------|
| 🚳 Dashboard | WordPress 4.5 is available! <u>F</u> | lease update now. | | | Screen Options | ▼ Help ▼ |
| ✤ Posts iiii Events | Users Add New | | | | | |
| 91 Media | Activate the WooThemes Upda | t <mark>er plugin</mark> to get updates for y | our WooThemes plugins. | | | |
| Pages Products Forms | This theme recommends the The following recommended | | n 7. :: Events Maker, Post Types Order and | Wise Mountain One Click Im | port. | Ø |
| | Begin installing plugin Begin | activating plugins Dismiss | this notice | | | |
| Appearance | All (562) Administrator (1) C | ustomer (559) OCWS Mana | ger (1) OCWS Admin (2) | | | Search Users |
| 😰 Plugins 📧 | Bulk Actions Apply | | - · · · · | 5 | 52 items | of 29 > » |
| 齢 Roles | Username | Name | Email | Role | Active Memberships | Posts |
| LUSERS | 1gyrene@dslextreme.co m | Maurice Hallauer | 1gyrene@dslextreme.co m | Customer | OC Wine Society Membership (Dual) | 0 |
| Export OCWS Export User Data Profile Builder | Trobmlang@gmail.com | Robin Lang | 1robmlang@gmail.com | Customer | | 0 |
| Tools Sottings | 4johnstauffer@gmail.co | John Stauffer | 4johnstauffer@gmail.co m | Customer | OC Wine Society Membership | 0 |

Complete the basic user information (membership information will be entered later).

- The <u>Username</u> will usually be the same value as the email address.
- <u>Email</u> must be the primary email address of the member (not co-member).
- <u>First Name</u> and <u>Last Name</u> are required.
- Leave website blank.
- The initial password will be the user's zip code (which they can change later.) <u>Confirm</u> <u>use of weak password</u> must be checked.
- <u>Send User Notification</u> must be checked.
- <u>Role</u> must be Customer.
- Click Add New User button after entering this data.

| M OCWS III 14 | | ugins are currently inactive: Events Maker, Post Types Orde activating plugins Dismiss this notice | er and Wise Mountain On | ne Click Import. | Howdy, Stacey 📃 🕈 |
|---|--------------------------------------|---|-------------------------|------------------|-------------------|
| 🛗 Events | Create a brand new user and add t | hem to this site. | | | |
| Pages | Username (required) | staylor@WineTastingtGuide.com | | | |
| 戸 Products 🖃 Forms | Email (required) | staylor@WineTastingtGuide.com | | | |
| WooCommerce | First Name | Stacey | | | |
| Appearance Plugins 13 | Last Name | Taylor | | | |
| 👪 Roles | Website | | | | |
| 📥 Users 🔸 | | | | | |
| All Users Add New | Password | 92677 Very weak | nide Cancel | | |
| Your Profile Export OCWS Export User Data | Confirm Password | Confirm use of weak password | | | |
| 👤 Profile Builder | Send User Notification | Send the new user an email about their account. | | | |
| ToolsSettings | Role | Customer | | | |
| Slider Revolution | Add New User | | | | |
| FB Album Pro | | | | | |
| Collapse menu | Thank you for creating with WordPres | 55. | | | Get Version 4.5 |

After adding the new user, the screen will show a list of users. You need to return to this user's profile to complete the membership information. Search for the new user by entering either the first or last name:

| Begin installing plugin Begin | activating plugins Dismiss this not | ice | | | |
|--|---------------------------------------|-----------------------------------|-----------------------------|--------------------|------------------------|
| All (563) Administrator (1) Cu Bulk Actions V Apply | istomer (560) OCWS Manager (1) | OCWS Admin (2) | | stacey | Search Users 2 item |
| Username | Name | Email | Role | Active Memberships | Posts |
| Stacey1 | Stacey Taylor | stacey@pacificsoftware.c om | OCWS Admin, OCWS Manager | | 0 |
| staylor@WineTastingtGu ide.com Edit Delete | Stacey Taylor | staylor@WineTastingtGui de.com | Customer | - | 0 |
| Username | Name | Email | Role | Active Memberships | Posts |
| Bulk Actions 🔻 Apply | | | | | 2 item |

Click the Edit link for the correct entry.

Enter the remaining membership information. The following images are broken by section but appear on the web page as a single page.

| Name | | |
|--------------------------|--|--------------------------------|
| Username | staylor@WineTastingtGuide.com | Usernames cannot be changed. |
| Role | Customer • | |
| First Name | Stacey | |
| Last Name | Taylor | |
| Nickname (required) | staylor@WineTastingtGuide.com | |
| Display name publicly as | Stacey Taylor 🔹 | |
| Contact Info | | |
| Email (required) | staylor@WineTastingtGuide.com | |
| Website | | |
| About the user | | |
| Biographical Info | | |
| | | |
| | Share a little biographical information to fill out your p | orofile. This may be shown put |
| Profile Picture | | |

| Account Management | |
|---|------------------------------|
| New Password | Generate Password |
| Name on Name Badge (required) | Stacey Taylor |
| Secondary Email | staylor@WineTastingGuide.com |
| Phone Number (required) | 949.831.8386 |
| Secondary Phone Number | 9495212228 |
| Occupation | |
| Birth Date | |
| Address (required) | 24032 Ironhead Lane |
| City (required) | Laguna Niguel |
| State (required) | California 🔻 |
| Zip Code (required) | 92677 |
| Home Winemaker? | Yes 🔻 |
| Who introduced you to the OC Wine Society? | Ronda |
| Communication Preference | E-mail |

| Date Initially Joined | |
|-----------------------------|--|
| Last Date Rejoined | |
| Last Date Un-Joined | |
| Membership Approved | |
| Attended Orientation | |
| Your Photo | Upload |
| Partner Photo | Upload |
| Change Password | |
| Age Verification (required) | • 🗹 I/we certify that all information contained herein is correct and that |
| | Membership in the Orange County Wine Society is subject to approval by the offered to two adults using the same mailing address. Your occasional guess Memberships are non-transferable and in the case of dual memberships on transferred or substituted for another person until the expiration date of the membership status are subject to approval by the Board of Directors. All me equal membership into the Society and possess equal voting rights. Member taken at OCWS events in the Wine Press and on the OCWS website and OCW |

Do **<u>not</u>** click on the Add membership link. Membership will be activated by processing a purchase order, described in a later process.

| User memberships | |
|--------------------------------|--------------------------------|
| This user has no memberships y | et. Add a membership manually. |
| | |

The Billing and Shipping information must be completed even though it is a duplicate of the above.

| Customer Billing Address | |
|--------------------------|------------------------------|
| First name | Stacey |
| Last name | Taylor |
| Company | |
| Address 1 | 24032 Ironhead Lane |
| Address 2 | |
| City | Laguna Niguel |
| Postcode | 92677 |
| | |
| Country | United States (US) |
| State/County | California |
| | State/County or state code |
| Telephone | 9495212228 |
| Email | staylor@WineTastingGuide.com |

| Customer Shipping Address | | | | |
|---------------------------|----------------------------|--|--|--|
| First name | Stacey | | | |
| Last name | Taylor | | | |
| Company | | | | |
| Address 1 | 24032 Ironhead Lane | | | |
| Address 2 | | | | |
| City | Laguna Niguel | | | |
| Postcode | 92677 | | | |
| Country | United States (US) | | | |
| State/County | California 🔹 | | | |
| Update User | State/County or state code | | | |

Click on <u>Update User</u>. The basic membership data is now complete. The next step is to create a membership order.

Click on WooCommerce/Orders/Add Order:



In the following screen:

- Set the Order Status to: Completed.
- Select the member (Customer) by entering the first few letters of their name. The Billing and Shipping data will now be filled-in by the system.
- Set <u>Payment Method</u> to: Check Payment. Optionally enter the check # in the note field.

|) 📸 OCWS 🔂 14 | 🏓 0 🕂 New 🛗 Events | | | | Но | wdy, Stace |
|-----------------------|--------------------------|---------------------|--|------------------|-------------------------|------------|
| Posts | Order #4700 deta | ils | | | Order Actions | |
| Events | General Details | | | | Actions | • |
| Media | Order date: | | | | Move to Trash | ave Ordei |
| Pages | 2016-04-25 | | @ 08 : 41 | | | ave order |
| | order status | | | | Email Customizer | |
| ⁷ Products | Completed | | | • | Email Customizer | |
| Forms | Customer | | | | Emails | , |
| WooCommerce | Stacey Taylor (#2265 – s | taylor@WineTastingt | Guide.com) | × • | Preview Email Send Ema | L |
| ders | Dilling Dataila | | Shipping Details | ج | | |
| upons | Billing Details | Last Name | Snipping Details First Name | Last Name | Order Notes | |
| emberships | Stacey | Taylor | Stacey | Taylor | | |
| ail Customizer | | Taylor | | Taylor | There are no notes yet. | |
| nd Store Credit | Company | | Company | | Add note ③ | |
| / Export | | | | | | |
| ports | Address 1 | Address 2 | Address 1 | Address 2 | | |
| tings | 24032 Ironhead Lane | | 24032 Ironhead L | ane | | |
| tem Status | City | Postcode | City | Postcode | Private note • Add | |
| l-ons | Laguna Niguel | 92677 | Laguna Niguel | 92677 | | |
| Appearance | Country | State/County | Country | State/County | | |
| | United States (US) 🔻 | California | United States (US) |) 🔻 California 💌 | | |
| Plugins 🕕 | Email | Phone | Customer Provided I | Note: | | |
| Roles | staylor@WineTastingG | 9495212228 | #1234 | | | |
| Users | Payment Method: | | 1234 | | | |
| Profile Builder | Check Payment | | v | | | |
| Tools | Transaction ID | | | | | |
| Settings | | | | | | |

Create a new order line item by clicking on Add line item(s):

| Payment Method: | | |
|-----------------|----------------------------------|----------------|
| Check Payment | • | 11 |
| Transaction ID | | |
| | | |
| | | |
| Order Items | | |
| Item | Cost Qty | Total |
| | ⑦ Discount: | \$0.00 |
| | ⑦ Shipping: | \$0.00 |
| | Order Total: | \$0.00 |
| | Refunded: | -\$0.00 |
| | | |
| Actions 🔹 🕑 | Add line item(s) Calculate Taxes | Calculate Tota |

Add a product to this new line item by clicking Add product(s)

| Check Payment | Y | | 11 |
|----------------|----------------|---------------|--------------|
| Transaction ID | | | |
| | | | |
| Order Items | | | |
| Order Items | | | A |
| Item | c | Cost Qty | Total |
| | ⑦ Disc | ount: | \$0.00 |
| | ③ Ship | ping: | \$0.00 |
| | Order 1 | Total: | \$0.00 🖋 |
| | Refur | nded: | -\$0.00 |
| Cancel Save | Add product(s) | Add fee Add s | hipping cost |
| Cancer Save | Add product(s) | Add lee Add s | hipping cost |

In the search box, enter: ocws. It will then display 2 choices. Select Dual or Single.

| Add products | 3 |
|--|------|
| | |
| ocws | |
| | |
| | |
| OCWS-Membership-Dual – OC Wine Society Membership – Membersh | hip |
| Type: Dual – \$60.00 | - |
| | |
| OCWS-Membership-Single – OC Wine Society Membership – Member | ship |
| Type: Single – \$45.00 | |

After you have selected the membership type, the order screen should look like this. Click on <u>Save</u> to record the membership line item into this order.

| Check Payment 🔻 | | |
|---|------------------------|-------------------|
| Transaction ID | | |
| | | |
| | | |
| Order Items | | * |
| Item | Cost | Qty Total |
| OCWS-Membership-Single – OC Wine Society Member | <u>ship</u> \$45.00 | 1 \$45.00 🖋 🛞 |
| Membership Single Type: | | |
| | ⑦ Discount: | \$0.00 |
| | ⑦ Shipping: | \$0.00 |
| | Order Total: | \$0.00 🖋 |
| | Refunded: | -\$0.00 |
| Cancel Save | Add product(s) Add fee | Add shipping cost |

Click on Calculate Total:

| Order Iter | ns | | | | |
|------------|--|------------------|-----|-----------|------------|
| Item | | Cost | Qty | Total | |
| | OCWS-Membership-Single – <u>OC Wine Society Membership</u> | \$45.00 | 1 | \$45.00 | <i>»</i> 🛞 |
| | Membership Single Type: | | | | |
| | | ⑦ Discount: | | \$0. | 00 |
| | | ⑦ Shipping: | | \$0. | 00 |
| | | Order Total: | | \$0. | 00 🖋 |
| | | Refunded: | | -\$0. | 00 |
| Actions | Add line item(s) Refund | d Calculate Taxe | * | Calculate | Total |

The screen should now reflect the correct Order total:

| Order iter | ns | | |
|------------|--|----------------------|-------------------|
| Item | | Cost | Qty Total |
| | OCWS-Membership-Single – <u>OC Wine Society Membership</u> Membership Single Type: | \$45.00 | 1 \$45.00 🖋 🛞 |
| | | ⑦ Discount: | \$0.00 |
| | | ⑦ Shipping: | \$0.00 |
| | | Order Total: | \$45.00 |
| | | Refunded: | -\$0.00 |
| Actions | Add line item(s) Re | fund Calculate Taxes | s Calculate Total |

Scroll to the top of the page, click on Save Order, and you're done!

| Order #4700 details | | | Order Actions | |
|---------------------|-----------|--|------------------|-----------|
| General Details | | | Actions | • ((|
| Order date: | | | Move to Trash | Save Orde |
| 2016-04-25 | @ 08 : 41 | | | |
| Order status: | | | Email Customizer | |

To verify the membership is now active, click on <u>WooCommerce/Memberships</u> Dashboard item. Then click on the member entry (which should be the first in the list):

| E FOITIIS | The following recommended | d plugins are currently inact | tive: Events Maker, Post Ty | ypes Orde | er and Wise Moun | tain One Cl | lick Import. | |
|-------------------|----------------------------------|-------------------------------|----------------------------------|-----------|------------------|-------------|---------------------|----------------|
| 🔤 WooCommerce 🧹 | B gin installing plugin Beg | in activating plugins Dism | iss this notice | | | | | |
| Orders | | | | | | | | |
| Coupons | Members Add Member | er | | | | | | |
| Memberships | | | | | | | | Search Men |
| Email Customizer | All (565) Mine (1) Active (5 | 10) E ured (51) Cancelle | ed (4) | | | | | Searchiven |
| Send Store Credit | Bulk Actions Apply | A ^r plans | All statuses | ٠ | Expires 🔹 | Filter | 565 items 《 | < 1 of 29 > |
| CSV Export | 🗌 Name | Email | Plan | Stat | us | Mer | mber since | Expires |
| Reports | Stacey Taylor | staylor@WineTastingtG | OC Wine Society | Acti | VA | Apri | il 25, 2016 8:44 am | April 25, 2017 |
| Settings | Stacey rayion | uide.com | Membership | /\cci | | Apri | 125, 2010 0.44 am | April 25, 2017 |

View the Plan (Single or Dual), Status, and Expires date. If any are incorrect, contact the web master for correction; do not attempt to correct yourself.

| 🔞 📸 ocws 🔂 14 | 🛡 0 🕂 New 🛗 Events | | | | Howdy, Stacey 📃 |
|---------------------------------------|---|-------------------------|---|------------------|-------------------------------|
| Pages | | | | | |
| 🛱 Products | Edit User Membership | Member | | | |
| 😑 Forms | | | | | |
| 📖 WooCommerce 🗸 | Member Details | OC Wine Society | Membership Add a plan | | |
| Orders | | Membership Details | | | |
| Coupons | | Plan: | OC Wine Society Membership | * | Billing Details |
| Memberships | | | oc whe society membership | | Purchased Order |
| Email Customizer Send Store Credit | | Status: | Active | • | in: <u>4700</u> |
| CSV Export | | Member since: | 2016-04-25 | - | Order April 25, Date: 2016 |
| Reports | | | 2010-04-25 YYYY-MM-DD | | Order \$45.00 Total: |
| Settings | | | | | Total: |
| System Status | | Expires: | 2017-04-25 YYYY-MM-DD - <u>Update expiration date to plan length</u> | | |
| Add-ons | Stacey Taylor | | TTTT-MM-DD - Opdate expiration date to plan length | | |
| Appearance | staylor@WineTastingtGuide.com | | Delete U | lser Membership | Transfer Save |
| 🖆 Plugins 1 | Member since April 25, 2016 | | | | |
| all Roles | Stacey Taylor 24032 Ironhead Lane | Membership Notes | | | |
| Lusers | Laguna Niguel, CA 92677 | Add note ⑦ | | | |
| | | | | | |
| Profile Builder | Recent Activity | | | | |
| 🖋 Tools | | | | | 1. |
| If Settings | OC Wine Society Membership: Membership access granted from purchasing OC Wine Society | | | Noti | fy Member Add Note |
| ↔ Slider Revolution | Membership (Order 4700) | Marsharship | | 1- (Order 1700) | |
| 📠 FB Album Pro | On April 25, 2016 at 8:44 am by Stacey | Membership access (| granted from purchasing OC Wine Society Membersh | iip (Order 4700) | |
| Collapse menu | | added on April 25, 2016 | at 8:44 am by Stacey <u>Delete note</u> | | |
| | | | | | |