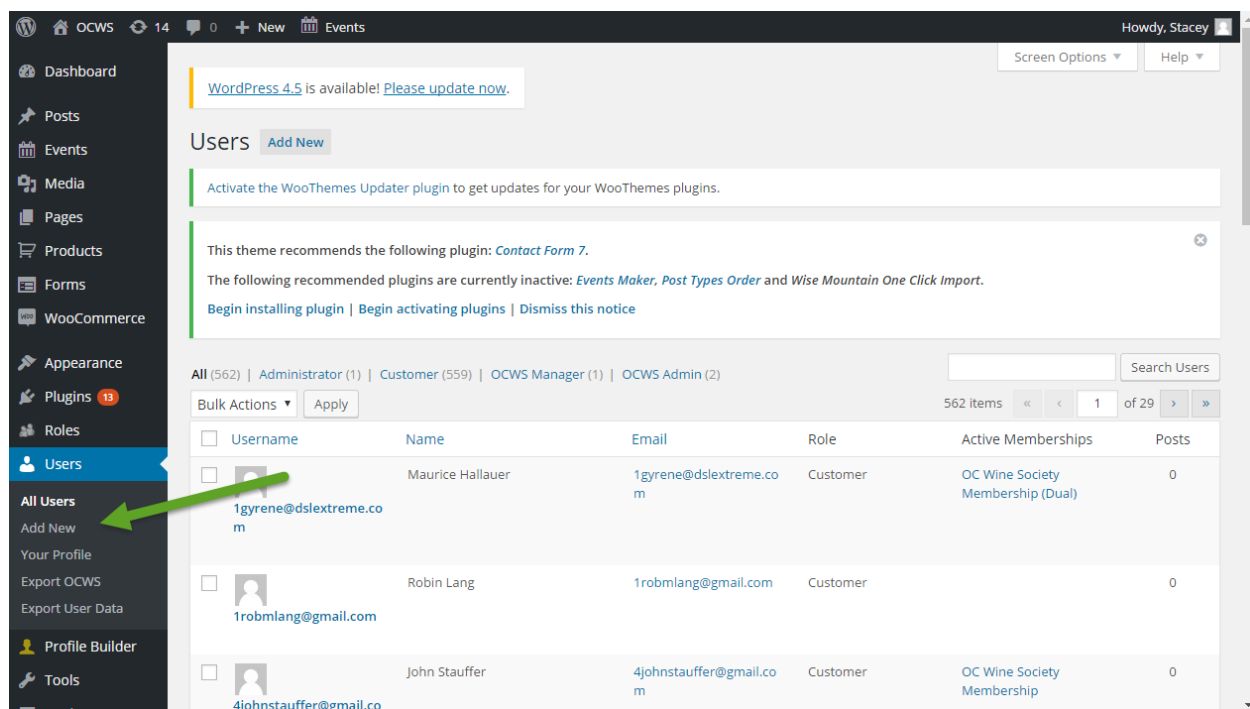


Creating a Membership – Manually

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:



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

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

The following recommended plugins are currently inactive: [Events Maker](#), [Post Types Order](#) and [Wise Mountain One Click Import](#).
[Begin installing plugin](#) | [Begin activating plugins](#) | [Dismiss this notice](#)

Create a brand new user and add them to this site.

Username (required)

Email (required)

First Name

Last Name

Website

Password Very weak [Hide](#) [Cancel](#)

Confirm Password ☒ Confirm use of weak password

Send User Notification ☒ Send the new user an email about their account.

Role

[Add New User](#)

[Thank you for creating with WordPress.](#) [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 notice](#)

[All \(563\)](#) | [Administrator \(1\)](#) | [Customer \(560\)](#) | [OCWS Manager \(1\)](#) | [OCWS Admin \(2\)](#)

[Search Users](#)

[Bulk Actions](#) [Apply](#) 2 items

<input type="checkbox"/>	Username	Name	Email	Role	Active Memberships	Posts
<input type="checkbox"/>	stacey1	Stacey Taylor	stacey@pacificsoftware.com	OCWS Admin, OCWS Manager		0
<input type="checkbox"/>	staylor@WineTastingtGuide.com	Stacey Taylor	staylor@WineTastingtGuide.com	Customer	-	0

[Edit](#) [Delete](#)

[Bulk Actions](#) [Apply](#) 2 items

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

Username cannot be changed.

Role

Customer ▼

First Name

Last Name

Nickname *(required)*

Display name publicly as

Stacey Taylor ▼

Contact Info

Email *(required)*

Website

About the user

Biographical Info

Share a little biographical information to fill out your profile. This may be shown publicly.

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?

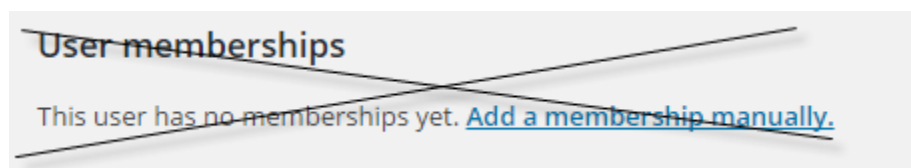
Ronda

Communication Preference

E-mail ▼

Date Initially Joined	<input type="text"/>
Last Date Rejoined	<input type="text"/>
Last Date Un-Joined	<input type="text"/>
Membership Approved	<input type="text"/>
Attended Orientation	<input type="text"/>
Your Photo	<input type="button" value="Upload"/>
Partner Photo	<input type="button" value="Upload"/>
Change Password	
Age Verification <i>(required)</i>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> I/we certify that all information contained herein is correct and that <p>Membership in the Orange County Wine Society is subject to approval by the Board of Directors. The Society is not responsible for any damages or injuries sustained by members or their guests. The Society is not responsible for any damages or injuries sustained by members or their guests. The Society is not responsible for any damages or injuries sustained by members or their guests.</p>

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



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 ▼
	<i>State/County or state code</i>
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 ▼

State/County or state code

[Update User](#)

Click on [Update User](#). The basic membership data is now complete. The next step is to create a membership order.

Click on [WooCommerce/Orders/Add Order](#):

The screenshot shows the WordPress dashboard with the WooCommerce menu highlighted. The 'Orders' section is active, displaying a list of orders. A green arrow points to the 'Add Order' button. The dashboard includes a sidebar with navigation links, a top notification bar, and a main content area with filters and a table of orders.

WordPress 4.5 is available! [Please update now.](#)

Orders [Add Order](#)

Activate the WooThemes Updater plugin to get updates for your WooThemes plugins.

This theme recommends the following plugin: [Contact Form 7](#).

The following recommended plugins are currently inactive: [Events Maker](#), [Post Types Order](#) and [Wise Mou](#)

[Begin installing plugin](#) | [Begin activating plugins](#) | [Dismiss this notice](#)

All (4) | [Trash \(106\)](#) | [Processing \(2\)](#) | [On Hold \(1\)](#) | [Cancelled \(1\)](#)

Bulk Actions [▼](#) [Apply](#) All dates [▼](#) Search for a customer... [▼](#) [Show all orde](#)

<input type="checkbox"/>		Export Status	Order	Purchased	Ship to	
<input type="checkbox"/>		—	#4697 by Hallie	2 items	Hallie Whelen, 8882	—

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 Payment Method to: Check Payment. Optionally enter the check # in the note field.

Order #4700 details

General Details

Order date: 2016-04-25 @ 08 : 41

Order status: **Completed**

Customer: **Stacey Taylor (#2265 - staylor@WineTastingGuide.com)**

Billing Details

First Name: Stacey, Last Name: Taylor, Company: , Address 1: 24032 Ironhead Lane, City: Laguna Niguel, Postcode: 92677, Country: United States (US), State/County: California, Email: staylor@WineTastingG, Phone: 9495212228

Shipping Details

First Name: Stacey, Last Name: Taylor, Company: , Address 1: 24032 Ironhead Lane, City: Laguna Niguel, Postcode: 92677, Country: United States (US), State/County: California

Payment Method: **Check Payment**

Transaction ID:

Customer Provided Note: **#1234**

Order Actions

Actions: Move to Trash, Save Order

Email Customizer

Emails: Preview Email, Send Email

Order Notes

There are no notes yet.

Add note: Private note, Add

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

Payment Method:

Check Payment

Transaction ID

Order Items

Item	Cost	Qty	Total
Discount:			\$0.00
Shipping:			\$0.00
Order Total:			\$0.00
Refunded:			-\$0.00

Actions

Add line item(s), Calculate Taxes, Calculate Total

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

Check Payment ▼

Transaction ID

Order Items

<input type="checkbox"/>	Item	Cost	Qty	Total
	?	Discount:		\$0.00
	?	Shipping:		\$0.00
		Order Total:		\$0.00 ✎
		Refunded:		-\$0.00

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

Add products

ocws|

OCWS-Membership-Dual – OC Wine Society Membership – Membership Type: Dual – \$60.00


OCWS-Membership-Single – OC Wine Society Membership – Membership Type: Single – \$45.00

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

Check Payment

Transaction ID

Order Items

<input type="checkbox"/>	Item	Cost	Qty	Total
<input type="checkbox"/>	 OCWS-Membership-Single – OC Wine Society Membership Membership Single Type:	\$45.00	1	\$45.00

Discount:

\$0.00

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 Items

<input type="checkbox"/>	Item	Cost	Qty	Total
<input type="checkbox"/>	 OCWS-Membership-Single – OC Wine Society Membership Membership Single Type:	\$45.00	1	\$45.00

Discount:

\$0.00

Shipping:

\$0.00

Order Total:

\$0.00

Refunded:

-\$0.00

Actions

Add line item(s)


Refund


Calculate Taxes


Calculate Total

The screen should now reflect the correct Order total:

Order Items

Item	Cost	Qty	Total
<input type="checkbox"/>  OCWS-Membership-Single – OC Wine Society Membership Membership Single Type:	\$45.00	1	\$45.00

? Discount: **\$0.00**
 ? Shipping: **\$0.00**
Order Total: **\$45.00** 
 Refunded: **-\$0.00**

Actions 
 Add line item(s) Refund Calculate Taxes Calculate Total

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


Order #4700 details


General Details

Order date: 2016-04-25 @ 08 : 41

Order status: Completed

Order Actions

Actions 

Move to Trash **Save Order** 

Email Customizer

Emails

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





The following recommended plugins are currently inactive: [Events Maker](#), [Post Types Order](#) and [Wise Mountain One Click Import](#).
[Begin installing plugin](#) | [Begin activating plugins](#) | [Dismiss this notice](#)

WooCommerce

- Orders
- Coupons
- Memberships**
- Email Customizer
- Send Store Credit
- CSV Export
- Reports
- Settings

Members [Add Member](#)

All (565) | Mine (1) | Active (510) | Expired (51) | Cancelled (4)

Bulk Actions  Apply All plans  All statuses  Expires  Filter 565 items « < 1 of 29 > »

<input type="checkbox"/>	Name	Email	Plan	Status	Member since	Expires
<input type="checkbox"/>	Stacey Taylor	staylor@WineTastingGuide.com	OC Wine Society Membership	Active	April 25, 2016 8:44 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

Forms

WooCommerce

Orders

Coupons

Memberships

Email Customizer

Send Store Credit

CSV Export

Reports

Settings

System Status

Add-ons

Appearance

Plugins 13

Roles

Users

Profile Builder

Tools

Settings

Slider Revolution


FB Album Pro

Collapse menu

Edit User Membership

Add Member

Member Details



Stacey Taylor

staylor@WineTastingGuide.com

Member since April 25, 2016

Stacey Taylor

24032 Ironhead Lane

Laguna Niguel, CA 92677

Recent Activity

OC Wine Society Membership: Membership access granted from purchasing OC Wine Society Membership (Order 4700)

On April 25, 2016 at 8:44 am by Stacey

OC Wine Society Membership

Add a plan...

Membership Details

Plan: OC Wine Society Membership

Status: Active

Member since: 2016-04-25
YYYY-MM-DD

Expires: 2017-04-25
YYYY-MM-DD - [Update expiration date to plan length](#)

Billing Details

Purchased in: [Order 4700](#)

Order Date: April 25, 2016

Order Total: \$45.00

Delete User Membership

Transfer

Save

Membership Notes

Add note

☐ Notify Member

Add Note

Membership access granted from purchasing OC Wine Society Membership (Order 4700)

added on April 25, 2016 at 8:44 am by Stacey [Delete note](#)