



How to Migrate to Paid Memberships Pro from s2Member®

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Introduction

What kind of site are we talking about?

This guide will walk you through switching your WordPress site's membership plugin from s2Member® to Paid Memberships Pro.

We will recommend a very specific set of steps that ensure no data is lost, that the transfer is seamless for your members, and that you don't miss sales in the process.

Deviating from the recommendations here may require some extra work above and beyond the scope of this document. Support can be found in the Paid Memberships Pro member forums:

<http://www.paidmembershipspro.com/forums/forum/members-forum/>

If you follow all of the advice and instructions in this document, your final site will include the following.

- Paid Memberships Pro powering your WordPress site's membership.
 - A clean uninstall of s2Member® (no lingering data in your database or settings).
 - Seamless ongoing payments from past customers (if recurring), and new member payments powered by Paid Memberships Pro.
-

What will I need and what will it cost?

Paid Memberships Pro is a 100% free, open source plugin. We offer Free, PMPro Core, and PMPro Plus membership. [See pricing »](#)

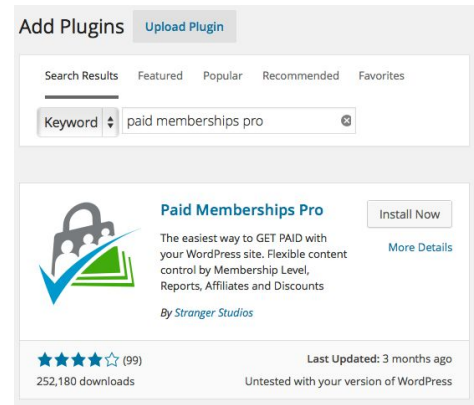
Install Paid Memberships Pro

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

Step 1: Installing Paid Memberships Pro

Option 1: Through the WordPress dashboard

1. Log in to the WordPress dashboard for your site.
2. Go to “Plugins > Add New”
3. Search for “Paid Memberships Pro” by Stranger Studios (It should be the first result you see)
4. Click “Install Now”. Enter your FTP credentials if needed.
5. Activate the plugin.



Option 2: Download a Paid Memberships Pro Package

Paid Memberships Pro Downloads: <http://www.paidmembershipspro.com/documentation/download/>

The newest plugin release + the newest WordPress CMS download + Memberlite Theme and a package of suggested plugins to include with your membership site:

- **Akismet:** <https://wordpress.org/plugins/akismet/>. Akismet checks your comments against the Akismet Web service to see if they look like spam or not.
- **BAW Login/Logout Menu:** <https://wordpress.org/plugins/baw-login-logout-menu/>. Add a correct login & logout link in your WP menus.
- **bbPress:** <https://wordpress.org/plugins/bbpress/>. bbPress is forum software, made the WordPress way.
- **BuddyPress:** <https://wordpress.org/plugins/buddypress/>. BuddyPress helps you run any kind of social network on your WordPress, with member profiles, activity streams, user groups, messaging, and more.
- **Google Analyticator:** <https://wordpress.org/plugins/google-analyticator/>. Adds the necessary JavaScript code to enable Google Analytics. Includes widgets for Analytics data display.
- **Hide Admin Bar from Non-admins:** <https://wordpress.org/plugins/hide-admin-bar-from-non-admins/>. The WordPress admin bar will be hidden for all non-admin users.
- **Kint Debugger:** <https://wordpress.org/plugins/kint-debugger/>. Recommended plugin to make debugging a more pleasant experience.
- **SS Old URLs:** <https://wordpress.org/plugins/ss-old-urls/>. This plugin allows you to add URL redirects through the WP admin for old content URLs. For example, you can redirect /about.html to /about/.
- **Theme My Login:** <https://wordpress.org/plugins/theme-my-login/>. Themes the WordPress login pages according to your theme.

- **W3 Total Cache:** <https://wordpress.org/plugins/w3-total-cache/>. Easy Web Performance Optimization using caching compatible with Paid Memberships Pro.
- **WordPress SEO:** <https://wordpress.org/plugins/wordpress-seo/>. Improve your WordPress SEO: Write better content and have a fully optimized WordPress site using Yoast's WordPress SEO plugin.
- **WP Bouncer:** <https://wordpress.org/plugins/wp-bouncer/>. Only allow one device to be logged into WordPress for each user.
- **WP DB Backup:** <https://wordpress.org/plugins/wp-db-backup/>. On-demand backup of your WordPress database.
- **WP Hide Dashboard:** <https://wordpress.org/plugins/wp-hide-dashboard/>. Hide the Dashboard menu, Personal Options section and Help link on the Profile page from your subscribers when they are logged in.

Unzip your downloaded files and move the folders into the proper locations on your web server. The main Paid Memberships Pro plugin folder (paid-memberships-pro) should be uploaded to your web server's "plugins" folder.

After uploading, access the "Plugins" panel of your WordPress Dashboard and activate the Paid Memberships Pro Plugin (and any other bundled plugins you wish to use on your site).

Step 2. Add a New Membership Level

On the dashboard, go to Memberships and select Membership Levels.

1. **Name:** The name of your Membership level (public)
2. **Description:** Optional content shown on the checkout page.
3. **Confirmation Message:** Optional content shown on the checkout confirmation page.
4. **Billing Details:** There are lots of options for configuring the level billing information. For example if you have a \$10/month plan, set the following fields to:
 - Initial Payment: \$10 (This is what is charged at checkout. E.g. \$10.)
 - Recurring Subscription: Yes
 - Billing Amount: \$10 per 1 Month
 - Billing Cycle Limit: None
 - Custom Trial: None
 - Membership Expiration: None
5. **Content Settings:** 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. This means that any post in a restricted/Members-Only category will be locked down for members of this level.
6. **Save Level**

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.


Screenshot: Memberships > Membership Levels > Add New

Add New Membership Level

ID:

Name:

Description:

 Add Media

Visual Text

b *i* [link](#) **b-quote** ~~del~~ **ins** **img** **ul** **ol** **li** `code` **more** **close tags**

Confirmation Message:

 Add Media

Visual Text

b *i* [link](#) **b-quote** ~~del~~ **ins** **img** **ul** **ol** **li** `code` **more** **close tags**

Billing Details

Initial Payment:

\$ The initial amount collected at registration.

Recurring Subscription:

Check if this level has a recurring subscription payment.

Billing Amount:

\$ per **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.

Other Settings

Disable New Signups:

Check to hide this level from the membership levels page and disable registration.

Membership Expiration:

Check this to set when membership access expires.

Expires In:

Day(s) 

Set the duration of membership access. Note that the any future payments (recurring subscription, if any) will be cancelled when the membership expires.

Content Settings

Categories:

- One
 Two
 Three

Save Level

Cancel

Step 3. Setting up PMPro Pages

The next Step is to set up some pages that Paid Memberships Pro needs to get the job done.

1. Click the **Pages** Tab. (From the dashboard, go to **Memberships** and select **Page Settings**)
2. Paid Memberships Pro can Generate these pages for you: Click the link that says **“let us generate them for you”**.

click here to let us generate them for you.' A red circle highlights this link, with a red arrow pointing to it from the left. Below this are several rows, each for a different page type: 'Account Page:', 'Billing Information Page:', 'Cancel Page:', 'Checkout Page:', 'Confirmation Page:', 'Invoice Page:', and 'Levels Page:'. Each row has a dropdown menu set to '-- Choose One --' and a note to 'Include the shortcode [shortcode]'. At the bottom left is a 'Save Settings' button, and at the bottom right is the 'POWERED BY PaidMembershipsPro' logo."/>

Pages

Assign the WordPress pages for each required Paid Memberships Pro page or [click here to let us generate them for you.](#)

Account Page: -- Choose One --
Include the shortcode [pmpo_account].

Billing Information Page: -- Choose One --
Include the shortcode [pmpo_billing].

Cancel Page: -- Choose One --
Include the shortcode [pmpo_cancel].


Checkout Page: -- Choose One --
Include the shortcode [pmpo_checkout].

Confirmation Page: -- Choose One --
Include the shortcode [pmpo_confirmation].

Invoice Page: -- Choose One --
Include the shortcode [pmpo_invoice].

Levels Page: -- Choose One --
Include the shortcode [pmpo_levels].

[Save Settings](#)

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This step sets the WordPress pages assigned to each required Paid Memberships Pro page. Go to <http://www.paidmembershipspro.com/documentation/templates/> for information on how to customize these pages.

Screenshot: Memberships > Page Settings

Pages

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

Account Page:

Membership Account

edit page

view page

Include the shortcode [pmpo_account].

Billing Information Page:

Membership Billing

edit page

view page

Include the shortcode [pmpo_billing].

Cancel Page:

Membership Cancel

edit page

view page

Include the shortcode [pmpo_cancel].

Checkout Page:

Membership Checkout

edit page

view page

Include the shortcode [pmpo_checkout].

Confirmation Page:

Membership Confirmation

edit page

view page

Include the shortcode [pmpo_confirmation].

Invoice Page:

Membership Invoice

edit page

view page

Include the shortcode [pmpo_invoice].

Levels Page:


Membership Levels

edit page

view page

Include the shortcode [pmpo_levels].

Save Settings

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Step 4. Payment Gateway & SSL Settings

1. Click the **Payment Gateway & SSL** Tab. (From the dashboard, go to **Memberships** and select **Payment Settings**)
2. **Payment Gateway:** Click the drop-down and select one of the payment options available (<http://www.paidmembershipspro.com/gateway/>). In the tutorial, we've chosen Stripe, which is free and quick to setup. Make sure to setup your account before you do this step.
3. **Gateway Environment:** Choose the **test or live gateway**. For the tutorial, we've selected Sandbox/Testing, but typically you want to set this to "Live".
4. **Complete the fields for your chosen Gateway:** For Stripe, enter your Stripe secret key and publishable key. Other payment methods will have different processes.
5. **Sales Tax:** For this example, we are not charging Sales Tax. **Always check with your accountant or your state tax office** to see if tax is required and the tax rate for your memberships.
6. **SSL:** An SSL certificate can be purchased and setup by your website hosting provider. If you are unsure, GoDaddy is a good SSL provider (<http://x.co/UAgC>) where you can get a cheap SSL to use no matter where your site is used. Learn more about setting up your SSL: <http://www.paidmembershipspro.com/documentation/initial-plugin-setup/ssl/>.
7. **SSL Seal Code:** If you have an SSL Seal Code paste it in the box here. (Note: the "seal code" is a bit of javascript or HTML verifying your site's security to your visitors and typically links to your SSL provider for verification.) This is different from the "SSL Certificate", which is the private key certificate that must be installed by your web host.
8. **HTTPS Nuclear Option:** If you have SSL Errors on your check out page, checking the **HTTPS Nuclear Option** will often fix them.
9. **Note:** You may see additional fields below, such as a webhook or a service url you might need to reference for your gateway.
10. **Save Settings**

Screenshot: Memberships > Payment Settings

Payment Gateway & SSL Settings

Learn more about [SSL](#) or [Payment Gateway Settings](#).

- Choose a Gateway -

Payment Gateway:

- Testing Only
- Pay by Check
- Stripe
- PayPal Express
- PayPal Website Payments Pro
- PayPal Payflow Pro/PayPal Pro
- PayPal Standard
- Authorize.net
- Braintree Payments
- 2Checkout
- Cybersource

Gateway Environment:

- Stripe Settings -

Secret Key:

Publishable Key:

Show Billing Address Fields:

No Stripe doesn't require billing address fields. Choose 'No' to hide them on the checkout page. If No, make sure you disable address verification in the Stripe dashboard settings.

Web Hook URL:

To fully integrate with Stripe, be sure to set your Web Hook URL to

[https://\[domain\]/paidmembershipspro.com/wp-admin/admin-ajax.php?action=pmpro_ajax_request](#)

- Currency and Tax Settings -

Currency:

Not all currencies will be supported by every gateway. Please check with your gateway.

Accepted Credit Card Types

- Visa
- Mastercard
- American Express
- Discover
- Diner's Club
- EnRoute
- JCB

Sales Tax (optional)

Tax State: (abbreviation, e.g. "PA") Tax Rate: (decimal, e.g. "0.06")

US only. If values are given, tax will be applied for any members ordering from the selected state. For non-US or more complex tax rules, use the [pmpro_tax filter](#).

- SSL Settings -

Force SSL:

- No
 - Yes
 - Yes (with JavaScript redirects)
- Recommended: Yes. Try the JavaScript redirects setting if you are having issues

SSL Seal Code:

Your [SSL Certificate](#) must be installed by your web host. Your SSL Seal will be a short HTML or JavaScript snippet that can be pasted here.

Extra HTTPS URL Filter:

Pass all generated HTML through a URL filter to add HTTPS to URLs used on secure pages. Check this if you are using SSL and have warnings on your checkout pages.

Save Settings

Step 5. Email Settings

1. Click the **Email** Tab. (From the dashboard, go to **Memberships** and select **Email Settings**)
2. **From Email and From Name:** Use these fields to change the email address and name used WordPress sends email communications to your members.
3. **Send the site admin emails:** Keep all boxes checked so you receive email confirmations about membership activity on your site.
4. **Save Settings**

Screenshot: Memberships > Email Settings

Email Settings

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

To modify the appearance of system generated emails, add the files *email_header.html* and *email_footer.html* to your theme's directory. This will modify both the WordPress default messages as well as messages generated by Paid Memberships Pro. [Click here to learn more about Paid Memberships Pro emails.](#)

From Email:

From Name:

Only Filter PMPro Emails?: If unchecked, all emails from "WordPress <wordpress@dev.paidmembershipspro.com>" will be filtered to use the above settings.

Send the site admin emails:

Checkout: when a member checks out.

Admin Changes: when an admin changes a user's membership level through the dashboard.


Cancellation: when a user cancels his or her account.

Bill Updates: when a user updates his or her billing information.

Send members emails:

New Users: Default WP notification email. (Recommended: Leave unchecked. Members will still get an email confirmation from PMPro after checkout.)

[Save Settings](#)

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Step 6. Advanced Settings

1. Click the **Advanced** Tab. (From the dashboard, go to **Memberships** and select **Advanced Settings**)
2. These fields are best left untouched, but from here you can:
 - Change the message shown when logged out or non-member tries to access membership-only content.
 - Change the message shown for membership-only content in your site's RSS feed.
 - Show or hide excerpts to logged out or non-members. It's a good idea to show excerpts on member pages since it entices new members to sign up and keep reading!
 - If you are running ads on your site, you can hide them for members (required additional configuration).
 - Requiring a credit card is the best spam prevention. But if you have a free level, you can turn on reCAPTCHA to add to the plugin's built-in spam prevention.
 - If you have a Terms of Service page on your site, you can choose it here. This will show a textarea on your checkout page and require the registrant to accept you terms prior to registration.
3. **Save Settings**

Screenshot: Memberships > Advanced Settings

Advanced Settings

Message for Logged-in Non-members:

This message replaces the post content for non-members. Available variables: !!levels!!, !!referrer!!

Message for Logged-out Users:

After you have successfully setup 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 register 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!

Export Your Members List From s2Member®

To export your members list, in the WordPress Dashboard go to s2Member® > Import/Export. Export to CSV. Using this export file, create a new spreadsheet of member data with the following columns:

user_email	membership_id	membership_enddate	membership_gateway	membership_subscription_transaction_id
------------	---------------	--------------------	--------------------	--

What should be in the these columns?

- **user_email:** The email address of the user.
 - **membership_id:** The PMPro membership level ID for their corresponding s2Member® level/role.
 - **membership_enddate:** For recurring members, should be blank. For one time payments with expirations set to the "EOT" date from s2 in YYYY-MM-DD format.
 - **membership_gateway:** paypalstandard, paypalexpress, or paypal depending on which flavor of PayPal you used with s2. "paypal" is the old "PayPal Website Payments Pro" or "Legacy PayPal Payments Pro" version.
 - **membership_subscription_transaction_id:** The PayPal subscription transaction id.
-

Install Import Users From CSV Plugin

“Import Users From CSV” is a third-party plugin written by Ulrich Sossou. You can download the plugin directly from the WordPress.org Repository (<https://wordpress.org/plugins/import-users-from-csv/>) or through the Plugins > Add New interface in your WordPress Dashboard.

Install PMPro Import Users From CSV Plugin

“PMPro Import Users From CSV” is an add on that extends the functionality of “Import Users From CSV” by Ulrich Sossou. It allows you to automatically assign membership levels to users and even update and continue existing subscriptions simply by adding a few columns to your CSV file.

This plugin can be downloaded from Paid Memberships Pro here:

<http://www.paidmembershipspro.com/wp-content/uploads/plugins/pmpro-import-users-from-csv.zip>

Backup Your Database

If you didn't backup before beginning this process, now is the critical time to do so.

If your host provides access to phpMyAdmin, you can download a full “dump” of your site's database through this interface. Alternately, we recommend installing the plugin “WP-DB-Backup” (WordPress Database Backup) by Austin Matzko, which gives you the ability to download a database backup on demand.

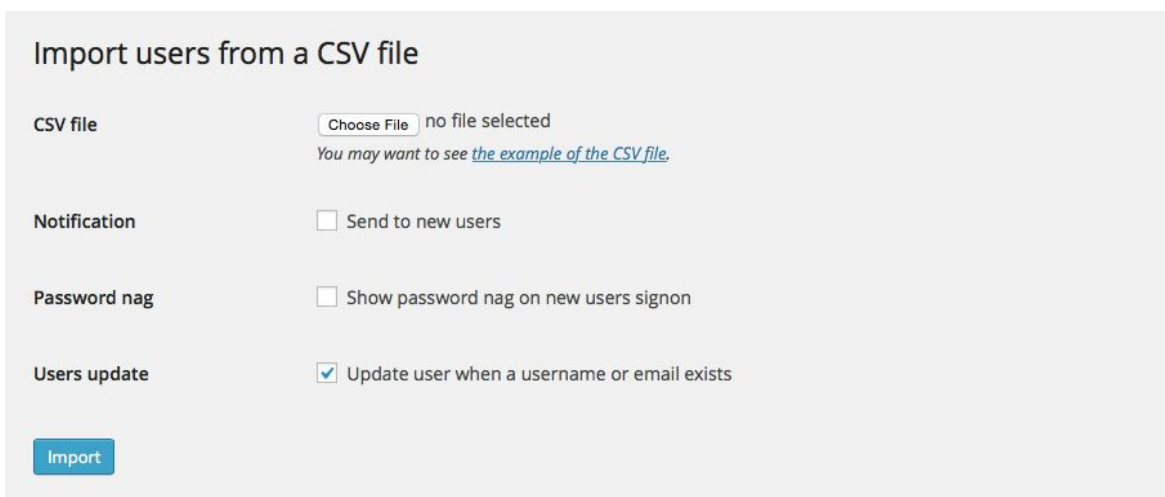
You can download the plugin directly from the WordPress.org Repository (<https://wordpress.org/plugins/wp-db-backup/>) or through the Plugins > Add New interface in your WordPress Dashboard.

You're Ready to Import

Navigate to **Users > Import From CSV** in your WordPress Dashboard.

- **CSV File:** Select the CSV file you prepared based on the s2Member® export.
- **Notification:** Leave this unchecked; This functionality allows you to send notification to newly created members. Since you are only updating meta information for existing WordPress Users you do not need any notification.
- **Password nag:** Leave this unchecked; This functionality is used when new users are added via import and a random password is assigned to their account. It would then prompt any new user to set a new password during their initial sign on.
- **Users update:** Check this! This will apply your new meta information per the CSV file being uploaded to existing users.

Screenshot: Users > Import From CSV



The screenshot shows the 'Import users from a CSV file' interface in WordPress. It features a title 'Import users from a CSV file' and four settings:

- CSV file:** A 'Choose File' button and the text 'no file selected'. Below it is a link: 'You may want to see [the example of the CSV file.](#)'
- Notification:** A checkbox labeled 'Send to new users' which is unchecked.
- Password nag:** A checkbox labeled 'Show password nag on new users signon' which is unchecked.
- Users update:** A checkbox labeled 'Update user when a username or email exists' which is checked.

At the bottom left, there is a blue 'Import' button.

A note about importing large member lists...

The limits of this CSV import method depend on your server power. On a mid-range VPS server, you can typically process 250-500 members at a time. This means breaking your import file into chunks. If you have a beefier server, test progressively larger lists until you hit the limit for your server.

It's also good to test a smaller CSV of just 1-3 rows before tackling a full import to make sure everything is updating as intended. After importing this test group of 1-3 members, navigate to Memberships > Members List in the WordPress Dashboard to verify your newly migrated members.

Redirect s2Member® IPN Traffic

If your memberships were recurring, PayPal will continue to send information via IPN to the s2Member® handler. The function below redirects the IPN to the correct location for Paid Memberships Pro to process. Add this code to your theme's functions.php file or a helper PMPro Customizations plugin (see <http://www.paidmembershipspro.com/2012/08/create-a-plugin-for-pmpro-customizations/>).

Via <https://gist.github.com/strangerstudios/cccf8144ca2f2a1e41d2>

```
function my_ipn_redirect() {
    if(!empty($_REQUEST['s2member_paypal_notify']) && defined('PMPRO_DIR'))
    {
        require_once(PMPRO_DIR . "/services/ipnhandler.php");
        exit;
    }
}
add_action('init', 'my_ipn_redirect');
```

Uninstall s2Member®

Remove s2Member® Roles

For a totally clean uninstall, run the script below to remove s2Member® roles from your WordPress site. Simply deactivating and deleting s2Member® will not remove these custom roles. Add this code to your theme's functions.php file or a helper PMPro Customizations plugin (see <http://www.paidmembershipspro.com/2012/08/create-a-plugin-for-pmpro-customizations/>).

Log in to your WordPress dashboard as administrator then navigate to **<http://YOURDOMAIN.com/?s2cleanup=1>**. This will update users with *s2member_level1* role to *subscriber* role. You must repeat this process for all used roles:

- **<http://YOURDOMAIN.com/?s2cleanup=2>** updates users with *s2member_level2* role

- <http://YOURDOMAIN.com/?s2cleanup=3> updates users with *s2member_level3* role
- <http://YOURDOMAIN.com/?s2cleanup=4> updates users with *s2member_level4* role

Then, navigate to <http://YOURDOMAIN.com/?s2cleanup=removeroles> to delete the roles.

Via <https://gist.github.com/strangerstudios/fc455c86697c213c83f6>

```
function init_s2cleanup()
{
    if(!empty($_REQUEST['s2cleanup']) && current_user_can('manage_options'))
    {
        echo "<h2>s2member Cleanup</h2>\n";
        global $wpdb;
        if($_REQUEST['s2cleanup'] == "removeroles")
        {
            echo "Removing roles s2member_level1-4.";
            remove_role("s2member_level1");
            remove_role("s2member_level2");
            remove_role("s2member_level3");
            remove_role("s2member_level4");
        }
        else
        {
            $level = intval($_REQUEST['s2cleanup']);
            //level1
            echo "<h3>s2member Level $level</h3>\n";
            $users = get_users(array("role"=>"s2member_level" . $level));
            foreach($users as $user)
            {
                echo "User " . $user->user_login . " changed to subscriber.<br />";
                $user->set_role("subscriber");
            }
        }
        exit;
    }
}
add_action('init', 'init_s2cleanup');
```

After completing this process, you should remove the script from your theme's `functions.php` file or the helper PMP Pro Customizations plugin.

Deactivate and Delete s2Member®

You can now safely deactivate and delete s2Member®, as well as any s2Member® plugins from your site's `wp-content/plugins/` folder.

Set Up Content Restrictions the Paid Memberships Pro Way

Now that your site is running on Paid Memberships Pro, all of your content restrictions need to be re-configured. Please see our documentation on Content Controls:

<http://www.paidmembershipspro.com/documentation/content-controls/>

With Paid Memberships Pro, content can be set as “members only” in a variety of ways:

For Pages

Paid Memberships Pro adds a “Require Membership” box to your WordPress “Edit Page” screen allowing you to control access for each active membership level (public and hidden).

<http://www.paidmembershipspro.com/documentation/content-controls/for-pages/>

For Posts

PMPro restricts Posts via the Category or single post “Require Membership” settings.

<http://www.paidmembershipspro.com/documentation/content-controls/for-posts/>

With Shortcodes

There is one shortcode for restricting access to content. Place these in any post or widget to show certain content to certain membership levels.

<http://www.paidmembershipspro.com/documentation/content-controls/with-shortcodes/>

Advanced Users

Advanced plugin users with knowledge of PHP functions can control access to web applications or other plugins via the Require Membership function.

<http://www.paidmembershipspro.com/documentation/advanced-techniques/require-membership-function/>