

HOW TO MIGRATE FROM s2Member TO PAID MEMBERSHIPS PRO

SEAMLESS MIGRATION THAT MAINTAINS
ACTIVE MEMBERS & PAID SUBSCRIBITONS



Paid Memberships Pro

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Introduction

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

Due to the nature of eCommerce, your live site will continue to bring in new data—new orders, new members, new comments and posts in your forum, for example.

The goal is to interrupt your live money-making site as little as possible. 💰

That said, if you are operating a small membership site and you can afford it, take your site down for a day or two. This process can be infinitely simpler if you just close your site to the public.

There are two important parts to completing your migration from s2Member® to Paid Memberships Pro:

1. Migrating your members and their subscriptions
2. Migrating the content protections from the previous system to the new system

We'll cover both of these processes. If you follow all of the advice and instructions in this guide, you'll end up with:

- A WordPress membership site powered by Paid Memberships Pro.
- A clean uninstall of s2Member® (no lingering data in your database or settings).
- Seamless ongoing payments from past customers (if recurring)
- 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 a free plan for access to documentation and our free Add Ons, plus three premium plans for access to technical support and automatic installs and updates for over 70 feature-enhancing Add Ons.

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Backup Your WordPress Website

In our post [Backup Your WordPress Site: The Complete Guide to Site Backups](#), we talk about the importance of regular site backups and how to create your own site backup. This is especially important for membership sites, since they deal with customer accounts and sensitive information.

Don't forget to create a backup of your site before continuing the migration process.

Pause Your Live Website

Data can get out of sync very quickly during a migration. You don't want any new member data to be created or altered while you complete the process, so we recommend temporarily pausing your live website.

This means:

- Disconnecting your s2Member® payment gateway
- Turning off all new membership signups
- Putting your main website in "Coming Soon" or "Maintenance" mode

You can use a plugin like [WP Maintenance Mode & Coming Soon](#) to add a maintenance post to your blog, or a coming soon page to your website.

Install and Set Up Paid Memberships Pro

The next step is to install Paid Memberships Pro on your website.

In our [Initial Setup](#) guide, we talk about how to install and activate Paid Memberships Pro. We also have [a companion downloadable guide “How to Set Up Paid Memberships Pro”](#) that you can use as a part of the migration process.

- Once you have PMPro installed, skip the Setup Wizard. You’ll need to replicate your s2Member® memberships as membership levels in Paid Memberships Pro.
- Navigate to **Memberships > Settings > Membership Levels** in the WordPress admin. You can refer to the Initial Setup guide for more information.
- Be sure to save your membership level IDs for later. But don’t connect your payment gateway just yet.

Keep working through all steps in the initial setup guide for Paid Memberships Pro.

Set Up User Fields

Does your membership have custom user fields configured in s2Member®? Do you want to add new user fields?

Paid Memberships Pro includes [custom user fields](#) to collect additional checkout fields and user profile information for members and admins.

Navigate to **Memberships > Settings > User Fields** to configure your custom fields. You can use the same Field Name as any custom field you had created in s2Member® so that the data is seamlessly converted and used in the PMPro members list, exports, and frontend user profile forms.

User Fields

Group Name: More Information

Show fields at checkout?

Show fields on user profile?

Description (optional, visible to users)

Restrict Fields for Membership Levels

- Standard
- Free
- Plus

Manage Fields in This Group

Order	Label	Name	Type
		+ Add Field	Delete This Group

[+ Add Field Group](#)

Prepare Your Data For Import

Export Your Members List From s2Member®

1. Navigate to **s2Member® > Import/Export** in the WordPress admin.
2. Click **“Export to CSV”**.

You now have the full export of your s2Member® data that you can use to build the import spreadsheet for Paid Memberships Pro.

Create the Import Spreadsheet

Using your exported data, create a new spreadsheet with the following columns:

- **user_email:** The email address of the user.
- **membership_id:**
 - Populate this column with the **membership level ID from Paid Memberships Pro** for their corresponding s2Member® level/role.
 - You can locate the PMPro level ID on the Memberships > Settings > Levels screen in the WordPress admin.
- **membership_enddate:**
 - For recurring members, leave this field blank.
 - For members on a fixed-term membership (one time payment or with a future expiration date) set to the **EOT date** from your s2Member® export in the format **YYYY-MM-DD**.
- **membership_gateway:**
 - Enter **paypalstandard**, **paypalexpress**, or **paypal** depending on which version of PayPal you used with s2Member®.
- **membership_subscription_transaction_id:** The PayPal subscription transaction id.

Install the PMPro Import Members From CSV Plugin

Our Import Members From CSV plugin is an Add On that allows you to import users and members into your WordPress site.

This plugin creates new users or updates existing members. It will automatically assign membership levels to users and maintain active subscriptions if you include a few additional columns in your import file.

This plugin can be downloaded from Paid Memberships Pro here:

<https://www.paidmembershipspro.com/add-ons/pmpro-import-users-csv/>

Backup Your Database

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

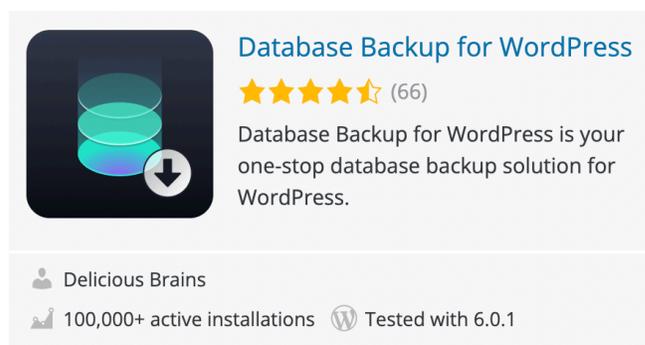
In our post [Backup Your WordPress Site: The Complete Guide to Site Backups](#), we talk about the importance of regular site backups and how to create your own site backup. This is especially important for membership sites, since they deal with customer accounts and sensitive information.

If your host provides access to phpMyAdmin, you can download a full "dump" of your site's database through this interface.

Alternatively, we recommend installing [Database Backup for WordPress](#) by Delicious Brains, which gives you on-demand database backups within the WordPress admin.

You can download the plugin directly from the [WordPress.org Plugin Repository](#) or through the **Plugins > Add New** interface in the WordPress admin.

1. Log in to your WordPress dashboard.
2. Go to **Plugins > Add New**
3. Search for **Database Backup for WordPress** by Delicious Brains
4. Click **Install Now**. Enter your FTP credentials if needed.
5. **Activate** the plugin.



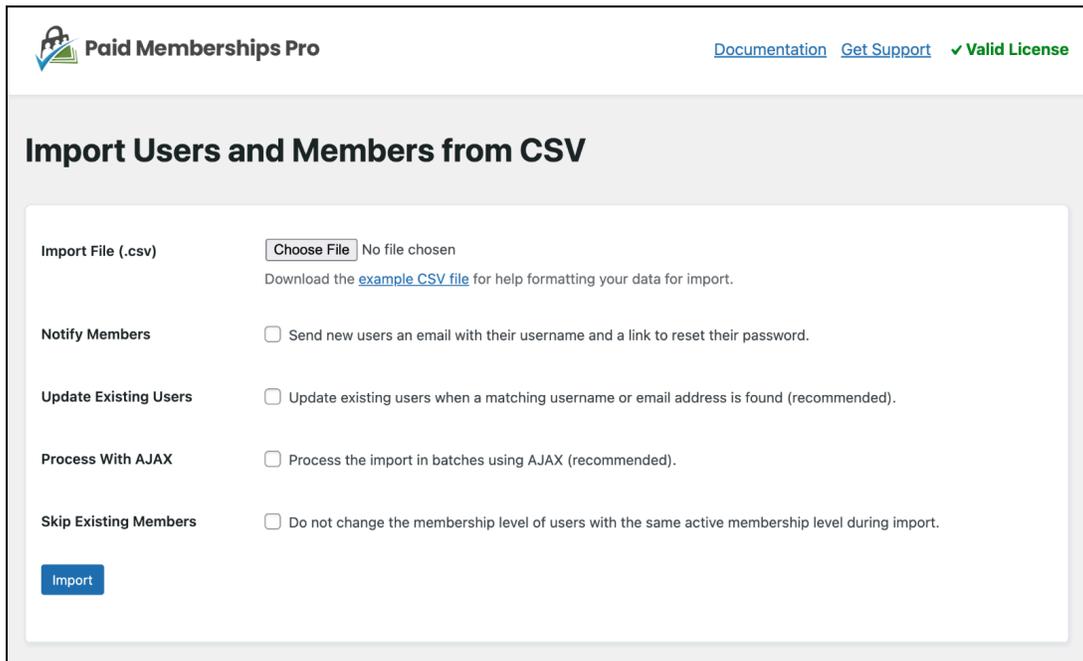
Please don't forget to create a backup of your site before continuing the migration process.

Complete Your Member Import

Navigate to **Users > Import Members** in the WordPress admin.

- Select the **Import File (.csv)**.
- **Notify Members:** Check this box to send new users an email with their username and a link to reset their password.
- **Update Existing Users:** Check this box to update existing users when a matching username or email address is found (recommended).
- **Process With AJAX:** Check this box to process the import in batches using AJAX (recommended, especially for large member lists).
- **Skip Existing Members:** It is unlikely that you have existing members since this is a new migration, so you do not have to check this box.

Screenshot: Users > Import Members



The screenshot shows the 'Import Users and Members from CSV' form in the Paid Memberships Pro WordPress admin interface. The form is titled 'Import Users and Members from CSV' and is located under the 'Users > Import Members' menu. The form includes the following fields and options:

- Import File (.csv):** A file selection field with a 'Choose File' button and the text 'No file chosen'. Below this field is a link to 'Download the example CSV file for help formatting your data for import.'
- Notify Members:** A checkbox labeled 'Send new users an email with their username and a link to reset their password.'
- Update Existing Users:** A checkbox labeled 'Update existing users when a matching username or email address is found (recommended).'
- Process With AJAX:** A checkbox labeled 'Process the import in batches using AJAX (recommended).'
- Skip Existing Members:** A checkbox labeled 'Do not change the membership level of users with the same active membership level during import.'

At the bottom of the form is a blue 'Import' button.

A Note About Importing Large Member Lists

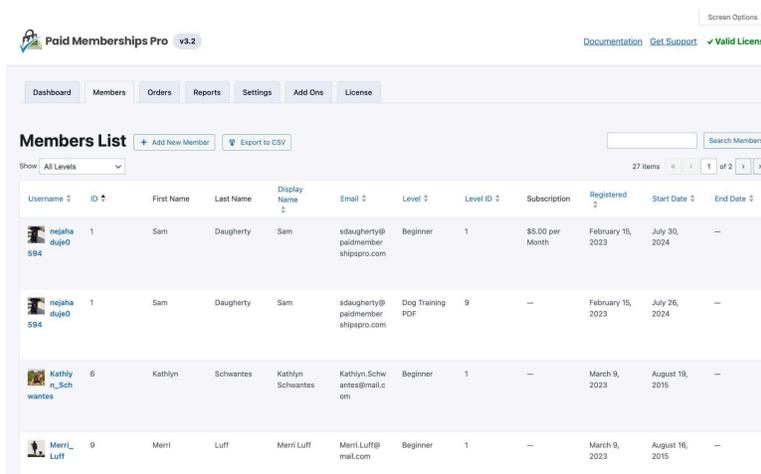
For larger CSV files, always choose the Process with AJAX setting. This lets the system process the import in batches, with a default batch size of 50 imports per iteration.

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, you can check your Members List under Memberships > Members and the Orders list under Memberships > Orders.

- The import process will create one PMPPro order for each newly imported member.
- The import process will not create a history of orders for all payments that member had made previously through s2Member.

Screenshot: Memberships > Members in the WordPress admin



Username	ID	First Name	Last Name	Display Name	Email	Level	Level ID	Subscription	Registered	Start Date	End Date
nejaha_duj0	1	Sam	Daugherty	Sam	sdaugherty@paidmember-shipspro.com	Beginner	1	\$5.00 per Month	February 15, 2023	July 30, 2024	—
nejaha_duj0	1	Sam	Daugherty	Sam	sdaugherty@paidmember-shipspro.com	Dog Training PDF	9	—	February 15, 2023	July 26, 2024	—
Kathly_n_Schwantes	6	Kathlyn	Schwantes	Kathlyn Schwantes	Kathlyn.Schwantes@mail.com	Beginner	1	—	March 9, 2023	August 19, 2015	—
Merri_Luff	9	Merri	Luff	Merri Luff	Merri.Luff@mail.com	Beginner	1	—	March 9, 2023	August 16, 2015	—

If everything looks correct, you are ready to do the full and final import. To do this, repeat the process from your test above using the full set of data (minus those test members already imported).

Resume Your Live Website

You're almost done! Now it's time to delete s2Member® and connect your payment gateway in PMPro.

Remove s2Member® Roles

For a totally clean uninstall, you need to remove the custom s2Member® roles from your WordPress site. If you only deactivate and delete s2Member®, these custom roles will remain active in your WordPress site.

There are two methods to delete the custom roles created by s2Member®:

- Use the [User Role Editor plugin](#) to delete custom roles.
- Run the script in the code snippet below in your WordPress admin.

Delete Custom Roles With User Role Editor Plugin

1. Install and activate [User Role Editor](#) (free plugin available in the WordPress.org plugin repository).
2. Navigate to **Users > User Role Editor** in the WordPress admin.
3. Click the **Delete Role** button in the right column. This action brings up a modal window with a dropdown field.
4. **Select the role** you would like to delete.
5. Click **Delete Role**.
6. Any user with the custom role is now reset to your WordPress site's default role (set on the **Settings > General** screen in the WordPress admin).

Delete Custom Roles With a Custom Script in the WordPress Admin

To use a custom script in your WordPress site, refer to our guide on [making customizations to your membership site](#). This tutorial explains two methods for adding custom code to adjust your membership site functionality: creating a custom plugin or using the Code Snippets plugin available for free in the WordPress repository.

1. Set up this code gist using your preferred method to make customizations to your membership site:
 - **Code Recipe: Remove s2Member® roles from WordPress:**
<https://gist.github.com/strangerstudios/fc455c86697c213c83f6>
2. Log in to your WordPress dashboard as administrator then navigate to <https://YOURDOMAIN.com/?s2cleanup=1>. This will update users with *s2member_level1* role to *subscriber* role.
3. **You must repeat this process for all used roles:**
 - <https://YOURDOMAIN.com/?s2cleanup=2> updates users with *s2member_level2* role
 - <https://YOURDOMAIN.com/?s2cleanup=3> updates users with *s2member_level3* role
 - <https://YOURDOMAIN.com/?s2cleanup=4> updates users with *s2member_level4* role
4. Then, navigate to <https://YOURDOMAIN.com/?s2cleanup=removeroles> to delete the roles.

Remove the script from your WordPress site after you complete the role removal process.

Deactivate and Delete s2Member®

Once you are sure everything is working properly, you can now safely deactivate and delete s2Member®, as well as any s2Member® plugins from your site's `/wp-content/plugins/` folder.

Activate Payments in Paid Memberships Pro

PMPro has only one settings page to configure the payment gateway for all memberships. Just navigate to Memberships > Settings > Payment Settings. The process of setting up a payment gateway is also outlined in the [Initial Setup guide](#).

Your subscription site relies on messages from the payment gateway to confirm that recurring payments have been received. Stripe refers to this as a “Webhook.” PayPal calls it an “IPN.”

As part of the gateway setup, be sure to update your Stripe Webhook or PayPal IPN within your merchant account. Instructions on how to configure this are available for both gateways in the documentation area: [Stripe Webhook Setup](#) and [PayPal IPN Setup](#).

If you need more help with webhooks or IPN, please [open a ticket in our members support area](#) so that our team can make sure you’re properly set up to receive the recurring payment messages from your connected gateways.

Redirect s2Member® IPN Traffic

If your memberships were recurring, PayPal will continue to send information via IPN to the s2Member® handler.

We have written a custom function to redirects this IPN (Instant Payment Notification) message to the correct location for Paid Memberships Pro to process.

Code Recipe: Redirect the s2Member® IPN URL to the PMPro IPN URL:

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

To use the custom function in your WordPress site, refer to our guide on [making customizations to your membership site](#). This tutorial explains two methods for adding custom code to adjust your membership site functionality: creating a custom plugin or using the Code Snippets plugin available for free in the WordPress repository.

Content Restrictions: The Paid Memberships Pro Way

Every membership plugin handles content restrictions in a different way. With Paid Memberships Pro, you can restrict individual pages, posts, or entire categories of posts.

Now that your site is running on Paid Memberships Pro, all of your content restrictions need to be re-configured.

Browse our [documentation on restricting content](#) to learn more about the various ways you can protect your content with PMPro.

[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).

[For Posts](#)

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

[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.

[With the Membership Required Block](#)

Use the Membership Required block to restrict access to nested block content for specific Membership Levels or for non-members only.

[Advanced Users](#)

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

Other Content Types

There are many other types of content you can protect in Paid Memberships Pro—almost too many to be able to list in one guide.

Here's a list of the most popular content types you may need to protect:

- [Custom post types \(CPTs\)](#)
- [Courses](#)
- Community features like [bbPress](#) and [BuddyPress](#)
- [Physical or Digital Products in WooCommerce](#)
- [Drip-Feed Content and Series](#)
- [Member Directories and Profiles](#)
- [Downloads](#)
- [Events](#)
- [Podcasts](#)
- [Newsletters](#)
- [Videos](#)

[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.
- ★ Learn how to [customize the email content](#) sent to your members or [email marketing integrations](#) integrated with PMPro.
- ★ Using a [page builder](#) or [advanced theme](#)? Browse our [compatibility docs](#).
- ★ 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 a trusted developer 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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