

CREATED BY HEY GEORGE

Hey George Memberships

Installation and customer guide

Version 1.0.0 | PayFast supported release

A practical guide to installing the plugin, setting up paid offers, protecting content and using the included member and CRM tools.

R1,950 per year | One website | Updates and email support during the paid term

The same annual price applies on renewal. The software licence is separate from the membership fees you charge your customers.

heygeorge.co.za/plugins/memberships.html

Support: info@heygeorge.co.za

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Set up the essentials first: install, activate, create an offer, protect content and test PayFast. Add the other tools when they fit your business.

01 / Start here

Hey George Memberships is a WordPress plugin. Install its ZIP on your existing website to add the Memberships administration workspace and member-facing pages. It does not replace your theme or install the demonstration website.

1. Purchase the annual licence at HeyGeorge.co.za. Create or sign in to your store account and verify your email.
2. After PayFast confirms payment, open My account in the Hey George plugin shop. Download the plugin ZIP and reveal your activation key.
3. In your WordPress administration, choose Plugins > Add New Plugin > Upload Plugin. Select the ZIP, install it and activate it.
4. Open Memberships > License, enter your purchased key and activate this website.
5. Open Launch setup. Create a starter offer, choose Direct PayFast (ZAR), protect starter content and test the member journey.

Useful details

R1,950 per year, with the same R1,950 annual renewal price, for one website, product updates and email support during the paid term. The annual software licence is separate from the membership prices you charge your members.

There is no free edition. Never share your key, gateway secrets or WordPress administrator password.

02 / Hosting and release scope

Use HTTPS, WordPress 6.8 or later, PHP 8.2 or later with Sodium, and a database that supports InnoDB. The host must allow HTTPS requests to the Hey George licence service and PayFast. Keep a tested website backup.

1. Use a reliable server cron every minute for WordPress due events. Ask your host to configure WP-Cron through WP-CLI or the normal WordPress cron endpoint. Disable visitor-triggered WP-Cron only after the server task is working.
2. Exclude member accounts, pricing checkout, private files and protected content from public page and CDN caches. Verify the result as a guest and an eligible member.
3. Configure a private writable directory outside the public website root for member downloads and assignments. Ordinary Media Library links are public.
4. Configure a real mail transport and test an inbox. Test mode may capture messages instead of sending them.
5. Core WooCommerce is optional for a native PayFast site; it is required for WooCommerce product checkout and the included order-based recurring engine. The paid WooCommerce Subscriptions extension is not required for new agreements.

Useful details

The first supported payment release is PayFast in ZAR. Stripe, PayPal and Stitch adapters are reserved for later verified releases and are unavailable for new paid checkout in this distribution.

The included WooCommerce recurring route uses classic checkout, not Checkout Blocks. A payment provider's processing fees remain separate from your Hey George software licence.

Third-party themes, builders, REST/GraphQL endpoints and cache systems can change how protected content is exposed. Test your actual site before opening sales; a configuration badge alone does not prove the customer journey.

03 / Your frontend pages

Activation creates Membership account and Membership plans pages when no pages have been selected. Add those pages to your site navigation. Change the page selections under Memberships > Settings.

1. Put [mp_plans] on the page where visitors compare membership offers and start checkout.
2. Put [mp_account] on the account page for registration, sign-in and the member dashboard.
3. Use the Membership Plans or Membership Account blocks in the WordPress block editor as an alternative to shortcodes.
4. Open Dashboard designer to adjust branding, section order and the relevant membership scope. Save a draft, preview it in your theme, then publish.
5. Open Registration forms to add full-width or half-width fields, membership-specific questions and conditional fields. Preview required fields before publishing.

Useful details

Use only one account shortcode or account block per page. Test registration, required questions and mobile layout with a normal member account.

Dashboard customization affects the plugin's member area. Your theme still controls the surrounding website header, footer and global typography.

04 / Create and protect an offer

A membership offer defines the price and paid access. A content rule defines which visitors may see a resource. Create both before selling.

1. In Launch setup or Membership offers, enter an offer name, currency, price and billing interval. Price fields marked as minor units use cents: 14900 is R149.00.
2. For the native PayFast route, choose ZAR and a supported frequency: daily, weekly, monthly, quarterly, six-monthly or annual. Native paid checkout needs an amount of at least R5.
3. Use Launch setup to connect the offer to Direct PayFast. An existing offer with members retains its billing route; create a new offer to change routes.
4. In Content rules, select the post, page or resource and the required offer. Any allows one qualifying membership; All requires every selected membership. A deny rule takes precedence.
5. Add drip timing if content should unlock later. Inspect the resource as a guest, an active member and an expired member.

Useful details

A manual membership grant or imported access record does not charge a card or create a gateway agreement.

Archive offers needed by historic members instead of deleting records. Editing a displayed price does not retroactively rewrite an existing customer's saved billing agreement.

05 / PayFast payments and renewals

Connect your own PayFast merchant account. Your customers' payments go through your merchant account; the Hey George licence purchase is a separate transaction.

1. Keep Billing mode set to Test. Enter sandbox merchant ID, merchant key and passphrase under Billing tools. Secrets are encrypted locally; leave a secret field blank to retain its saved value.
2. Use the callback URL shown by the plugin. Allow PayFast's public notification to reach your HTTPS site without login, maintenance interception or caching.
3. Choose a buyer email different from the merchant sandbox account email. Complete the virtual payment in PayFast and return to the member account.
4. Check the verified paid receipt, membership paid-through date and access to the protected resource. A success redirect alone never grants access.
5. Check cancellation and the provider state. Stopping future billing preserves the already paid term; deleting the plugin or revoking local access does not cancel an agreement.
6. For live operation, configure the matching live credentials and mode, confirm your PayFast merchant's recurring permissions, and repeat the initial-payment and cancellation checks on your real site.

Useful details

Native PayFast schedules recurring charges at the provider. The included WooCommerce engine uses saved-card authorization and its own renewal worker. Do not attach two schedulers to the same agreement or interchange their tokens.

Native PayFast coupon checkout is not supported. PayFast financial refunds are processed at the provider; reconcile the resulting payment and access records in the plugin rather than assuming a local status change refunded money.

Test delayed notifications and failure recovery. A queue must be processed by the worker before its verified receipt can extend access. Use Operations to inspect errors instead of repeatedly purchasing the same offer.

06 / WooCommerce and recurring orders

Install core WooCommerce if you sell membership-linked products or need order-based billing. New recurring agreements use the engine included in this plugin, without the separately paid WooCommerce Subscriptions extension.

1. Set WooCommerce currency and membership currency to the same value. Match the WooCommerce billing mode and membership billing mode.
2. Use Launch setup to create a simple virtual membership product, or map an existing supported simple/variation product to an offer.
3. Use the classic WooCommerce checkout. The recurring consent checkbox and agreement summary show price, frequency and future billing before payment.
4. Review the first paid order, recurring contract and receipt-derived member access. A renewal order extends access only after verified payment.
5. Inspect the minute worker, failures and reconciliation tools under Operations. Pause or cancel through the member account or the owned billing controls.

Useful details

Checkout discounts and additional fees apply to the first order only for the included recurring route. Review the saved recurring summary before accepting the agreement.

Historic native or WooCommerce Subscriptions agreements retain their own scheduler. Importing member access does not migrate provider tokens or authorize a new recurring charge.

07 / Work with the native CRM

The included membership CRM needs no separate CRM subscription. It keeps contacts, linked members, tags, consent, notes, tasks, segments and opportunities together.

1. Open CRM. Add a lead or open an existing member-linked contact. Check the email and member relationship before creating duplicates.
2. Apply tags that describe useful business context. Select contacts explicitly before using batch tagging; existing tags and marketing permission remain intact.
3. Record private notes and use note search to find earlier conversations. Keep information relevant to the relationship and your privacy policy.
4. Create a follow-up task with an owner and due date. Use Today, Upcoming and Overdue queues, then mark a completed task done.
5. Create a saved segment from tags, member relationships and follow-up status. Review the matching contacts before applying an action.
6. Create an opportunity with a stage, owner, value and currency. Filter open or stale opportunities and update stages as the relationship progresses.
7. Use Workflows for eligible event-driven tasks and messages. Inspect the operation queue after a test event.

Useful details

Opportunity value is an estimate in major currency units: 149.00 means R149.00. Won does not charge the contact or grant membership, and pipeline estimates are not paid revenue.

Marketing permission is separate from paid access. Do not infer permission from registration or a membership purchase. Record consent before marketing actions.

Optional external connector screens exist, but third-party CRM account synchronization is outside the first supported launch scope. The native CRM works independently of those accounts.

08 / Courses and private resources

Build a member learning journey with courses, lessons, assessments, assignments and certificates. Protect the course and each relevant lesson or resource.

1. Create a course, add lessons and connect the intended access rules. Test visibility as a normal learner.
2. Configure assessment requirements and assignment instructions. Use the private upload path for assignment files rather than public Media Library links.
3. Review submissions and completion before issuing certificates. Use the certificate verification block or verification view when sharing verification details.
4. Upload member resources under Private files and choose the required memberships. Download links are short-lived and require the authorized member session.
5. Review coaching and learning tools only after the core course and its member access behave correctly.

Useful details

The plugin does not provide a full visual LMS page builder, external booking platform or virus-scanning service. Configure host-level malware scanning for uploads where your business needs it.

Certificates represent the completion rules you configured; they are not third-party professional accreditation.

09 / Teams and community

Offer organization seats and member community spaces when they fit your business. Team access follows the paying organization's entitlement.

1. Configure seat allowances and invite an organization owner and member to a test organization.
2. Use verified-domain enrollment or invitations as configured; confirm the recipient accepts the correct organization.
3. Review seat usage, rosters and handover controls. A management handover does not automatically transfer the payment merchant or payer.
4. Create a community space, select membership restrictions and choose moderation settings.
5. Test posting, reporting, blocking and moderation with a member account. Set digest cadence and member opt-in before enabling digest delivery.

Useful details

Community private group messaging and group file sharing are not included in this release. Use the actual protected spaces and moderation tools described here.

Learner progress shown to organizations follows the learner permission controls. Review privacy expectations before sharing progress.

10 / Revenue, recovery and operations

Use paid receipts for actual money movement and member records for access. Recurring estimates, opportunity values and member counts describe different things.

1. In Business analytics, choose a date range and currency. Filter paid receipts by provider, status, plan and reference; open a receipt for its details.
2. Save personal receipt filters for repeated work. Export the matching CSV privately from an administrator session.
3. Use contract exploration for observed recurring movement. Keep totals in different currencies separate instead of adding them without an exchange-rate policy.
4. In Billing tools, review the agreement's provider, owner, mode and state before pausing, cancelling or reconciling it.
5. In Operations, inspect cron heartbeat, queued events, mail and delivery failures. Fix the cause before retrying an eligible job.
6. Back up the database, private files and WordPress configuration together. Restore to an isolated site and verify content access and encrypted credentials before relying on the backup.

Useful details

A green readiness item confirms a configuration check, not a guarantee of payment settlement or inbox placement.

Restoring a backup to another hostname does not authorize it to charge existing agreements. Merchant, mode and site identity guards stop mismatched recurring billing.

11 / Migration, privacy and updates

Import access carefully and keep business data recoverable. Membership history, payment agreements and the annual software licence are separate records.

1. Export a representative source CSV. In Migration, map columns and run the preview. Resolve errors and duplicates before applying the batch.
2. Inspect imported members, expiry and protected-content access. Imported data does not create payments or move gateway agreements.
3. Use WordPress privacy export and erasure tools for eligible data requests. Account for financial retention requirements in your own policy.
4. Keep the annual licence active for new setup, sales and signed software updates. WordPress checks for authorized releases and verifies the downloaded archive.
5. To move your licensed website, release its activation in your Hey George store account or in Memberships > License, then activate the destination. One paid licence allows one website.

Useful details

If the software licence locks or expires, existing content protection, previously paid access, billing recovery, cancellation and exports remain available. New commercial configuration and sales require an active purchased key.

Deactivation retains membership data and private files and stops scheduled workers. Cancel provider agreements deliberately before permanently removing the plugin; uninstalling files does not cancel recurring payments.

12 / Administration section reference

Use the search box in the plugin sidebar to find a section. Expand Help with this section for context, and use the information buttons beside fields with a mouse, keyboard or touch.

Overview

Start with setup status and the business workspace.

Business analytics

Explore paid receipts, refunds and recurring contract observations.

Reports

Review access records and membership counts.

Launch setup

Follow the seven setup steps and connect a starter offer.

Readiness

Review payment, mail, licence, storage and worker configuration.

Members

Inspect paid access, manual grants, revocations and team relationships.

Membership offers

Manage prices, billing terms, offer families and archive status.

Billing tools

Configure PayFast and manage owned recurring agreements and recovery.

Team tools

Manage seats, invitations, domains and organization handovers.

Content rules

Set any/all/deny access and drip timing.

Dashboard designer

Customize member-area branding, scope and section order.

Registration forms

Build and preview scoped, conditional and required questions.

Community

Manage restricted spaces, moderation and digest settings.

Learning

Manage courses, lessons, assessments and learner tools.

Private files

Store and serve member downloads outside the public root.

CRM

Manage contact relationships, tags, notes, tasks and opportunities.

Workflows

Configure eligible event-driven actions and mail transport.

Growth

Manage eligible offers, referrals and affiliate accounting tools.

Communications

Review member messaging and delivery settings.

Integrations

Review connection settings and supported gateway routes.

Migration

Preview and apply controlled CSV imports.

Operations

Inspect background workers, reconciliation and failed jobs.

Settings

Select frontend pages, billing mode, storage and access grace.

License

Activate, refresh or release this website's software licence.

Useful details

Some growth tools depend on the chosen checkout route. Native PayFast coupons and automatic affiliate payouts are not included; confirm eligibility in the relevant screen before using an offer.

13 / Troubleshooting and support

Email info@heygeorge.co.za for support during your paid licence term. Include the plugin version, WordPress/PHP versions, affected page and a clear description with private information removed.

Activation refused

Check the purchased key and paid term in My account. Release an unused website activation if your one-site allowance is occupied. Confirm outbound HTTPS access and the correct website address.

Payment returned but no access

Wait for the verified PayFast notification and worker. Inspect Operations and the paid receipt. A return-page visit cannot confirm settlement.

Renewal or queued work is late

Confirm the server cron heartbeat, worker errors, merchant credentials and mode. Do not switch modes or manually create paid receipts to mask a provider problem.

Members see protected content while logged out

Exclude protected pages and member resources from all public caches. Inspect your builder and third-party endpoints for alternate content exposure.

A private download is unavailable

Check private storage permissions, membership eligibility and the signed-link expiry. Request a new link from the current member session.

Email does not arrive

Inspect captured messages and the delivery queue, verify SMTP settings and check recipient spam. Have your host check sender-domain DNS and transport logs.

Dashboard layout differs from the demo

Preview within your active theme, review Dashboard designer settings and inspect conflicting theme styles. The demonstration theme is not installed with the plugin.

Moving a website

Back up first, release the old licence activation, then activate the new HTTPS site. Re-authorize merchant billing deliberately; a copied site must not silently charge existing members.

Useful details

Never send license keys, API secrets, card information, private database backups or member records in a public support message.