

Yoga Membership Application - Documentation

Workflow Overview

1. User Journey:

- User visits the /yoga-plans/ page.
- All yoga membership types are listed: **Instructors, Studios, Retreats**.
- User selects a plan and clicks "**Buy Now Membership**".
- Redirected to the **checkout page** to fill in account and billing details.
- On clicking "**Proceed to Checkout**", redirected to **Razorpay Payment Page**.
- After successful payment:
 - User is auto-logged in.
 - Redirected to **membership confirmation page**.
 - User can now access the **Dashboard** to update their public profile.
 - Newly registered users appear on /employer-listing/.

2. Failed/Declined Payments:

- Users can still log in.
- However, they **cannot access profile or dashboard-related pages** until a valid membership is purchased.

Required Plugins

Plugin	Purpose
WP Job Board (Bundled with theme)	Used to manage and display Yoga employers (Instructors, Studios, Retreats).
Paid Memberships Pro (PMPPro)	Core plugin to create and manage membership plans.
PMPPro - Roles Add On	Assigns specific user roles upon membership purchase.
User Role Editor	Add or modify user roles (yoga_instructor, yoga_studios, yoga_retreats).
Knit Pay	Handles Razorpay integration for PMPPro memberships.
PMPPro Custom Support Plugin	A custom plugin to ensure integration between PMPPro, WP Job Board, and Knit Pay.

✂ Step-by-Step Configuration

✅ Step 1: Manage Employer Categories

1. Navigate to: wp-admin > Employers > Categories
2. Create or verify the following **employer categories**:
 - **Yoga Instructor** → Slug: yoga-instructor
 - **Yoga Studios** → Slug: yoga-studios
 - **Yoga Retreats** → Slug: yoga-retreats

⚠ Do **NOT** change the **name or slug** of these categories — they are system-critical.

✅ Step 2: Manage Membership Plans

1. Navigate to: wp-admin > Memberships > Dashboard
 2. Click **View Membership Levels**.
 3. To **create or edit** a level:
 - Ensure the **title** contains either Instructor, Retreats, or Studios. (Used for filtering)
 - Enter pricing, billing cycle, and expiration details.
 - Scroll to **Other Settings > Roles** and select:
 - yoga_instructor for instructors
 - yoga_retreats for retreats
 - yoga_studios for studios
 4. Save the level.
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💳 Payment Gateway Configuration

1. Navigate to: wp-admin > Knit Pay > Configuration
 2. Under **Razorpay Payment Gateway**:
 - Click **Edit**.
 - Set **Payment Provider** to: Razorpay - Easy Connect
 - Click **Connect to Razorpay**, authorize it, and return.
 - Confirm **Connection Status** shows as **Connected**.
 - Ensure the **Mode** is correct (Test or Live).
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✉ Subscription Email Template

1. Go to: wp-admin > Memberships > Settings > Email Templates
 2. Select **Membership Expiring** template.
 3. Customize:
 - Subject line
 - Email content (personalize with merge tags, branding)
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Expiration Warning Settings

1. Navigate to: wp-admin > Memberships > Settings > Expiration Warnings
 2. Configure when to **send warning emails** before membership expiration.
 - Example: 15 days before expiry
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Frontend Page Setup

Yoga Plans Page

Use these shortcodes inside the /yoga-plans/ page:

shortcode

CopyEdit

```
[pmpo_membership_selector membership_type="yoga_instructor"]
```

```
[pmpo_membership_selector membership_type="yoga_studios"]
```

```
[pmpo_membership_selector membership_type="yoga_retreat"]
```

These display the dropdown or membership plans by category.

Custom Scripts and Styles

- Go to: wp-admin > Code Snippets > Header & Footer > Footer
 - Any required **CSS or JavaScript** for styling and redirection is written here.
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User Dashboard & Listing

- Once membership is confirmed, users are assigned the correct role and redirected to their **dashboard**.
- They can update public profile information based on role.
- All users appear under: /employer-listing/ categorized by **Employer Type**.

 Users without active membership cannot update their profile or appear on the listing.

 **Notes**

- Only one active membership is supported per user.
- Role-based access control is enforced based on PMPro role assignment.
- In case of technical issues, confirm:
 - PMPro plugin is active
 - Roles Add-On is correctly assigning roles
 - Knit Pay is connected to Razorpay