

QuantaCade

QC Membership Manager

User Walkthrough

A plain-language setup and daily-use guide for Joomla site administrators

QC Membership Manager helps Joomla site owners sell and manage memberships, connect membership status to Joomla user groups, offer member dashboards, record billing activity, send lifecycle emails, and process one-time PayPal checkout payments.

Document version: July 2026 release-preparation draft

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1. What QC Membership Manager does

QC Membership Manager is a Joomla membership extension for selling and managing membership access. It is designed for site owners who want membership plans, group-based access, billing records, lifecycle emails, and a simple member experience without setting up recurring billing or multiple payment gateways.

Core capabilities

- Create membership plans with pricing, duration, descriptions, images, and frontend display options.
- Assign Joomla user groups when a membership becomes active.
- Offer frontend plan listing, plan detail, checkout, and member dashboard pages.
- Process paid memberships through one-time PayPal Card Fields checkout.
- Record subscriptions, invoices, payment events, credits, refunds, and manual payment activity.
- Send member lifecycle emails using editable templates.
- Run expiration checks and reminder emails through Joomla Scheduled Tasks where available for the license tier.
- Export reports for subscriptions, billing, payment events, refunds, credits, plan activity, and membership status.

Release scope

This release uses PayPal for one-time membership checkout. It does not include recurring billing, PayPal subscription profiles, Stripe, alternate processors, or an import tool from another membership extension.

2. Before you begin

Requirements

Item	Requirement
Joomla	A supported Joomla 4, Joomla 5, or Joomla 6 site. Final compatibility should be verified on your site before going live.
PHP	A modern PHP version supported by your Joomla installation.
PayPal account	A PayPal business/developer setup with Sandbox or Live credentials for Card Fields checkout.
Joomla user groups	User groups should be planned before you connect membership plans to site access.
QuantaCade license key	A valid license key is used for activation, updates, and support status.

Recommended preparation

- Create a test Joomla user account for member checkout testing.
- Create or identify the Joomla user groups that members should receive after payment.
- Decide which membership plans you want to offer before building the frontend pages.
- Start with PayPal Sandbox mode while testing, then switch to Live mode only when checkout is confirmed.

3. First setup checklist

1. Install the QC Membership Manager package through Joomla Extension Manager.
2. Open Components > QC Membership Manager in the Joomla administrator area.
3. Activate or validate your QuantaCade license key on the Status tab.
4. Review Settings and confirm currency, PayPal mode, and PayPal credentials.
5. Create at least one published membership plan.

6. Assign safe, non-administrator Joomla user groups to the plan.
7. Create Joomla menu items for plan listing, plan detail if needed, checkout, and member dashboard.
8. Run a full test checkout in PayPal Sandbox mode.
9. Confirm the subscription activates, invoice is paid, payment event is logged, and Joomla group access is assigned.
10. Review frontend wording and design controls before going live.

4. Admin area overview

The admin area is organized into tabs. The exact tabs available can vary by version and license state, but the core workflow is consistent: set up the extension, create plans, manage members, review payments, and configure the frontend experience.

Tab	Purpose
About	Product summary and high-level feature orientation.
Support	Support Center, product page, profile link, documentation downloads, and installed support information.
Status	License status, effective tier, saved key summary, installation UUID, update/support information, and integration status.
Settings	General settings, PayPal checkout settings, lifecycle settings, currency, and admin-level behavior.
Plans	Create, edit, publish, and organize membership plans.
Subscriptions	Review and manage member subscription records.
Reports	Review and export subscriptions, billing, payment events, refunds, credits, and plan activity.
Email Templates	Edit plain-text and HTML member notification templates where supported by the license tier.
Billing	Review billing records, payments, credits, refunds, and related account activity.
Coupons	Manage coupon features where included by license tier.
Frontend Design	Adjust layout and visual styling for frontend output.
Frontend Text	Customize titles, body text, labels, messages, and wording shown to members.

5. Activate your license

A license key connects your installation to QuantaCade account, support, and update services. License validation also determines the effective tier used by plan limits and advanced features.

How to activate

11. Open the QC Membership Manager admin area.
12. Go to the Status tab.
13. Enter or confirm your saved license key.
14. Click Activate or Validate License.
15. Confirm that License Status, Effective Tier, and Saved Key display the expected values.

What to check after activation

- License Status should no longer remain stuck on validation pending after a successful validation.
- Effective Tier should match the license assigned to the key, such as Basic, Pro, Max, or All Access.
- The saved key should be masked for safety. The full key should not be displayed in normal admin screens.
- Installation UUID should remain available for support and troubleshooting.

Security note

Do not share private license keys, PayPal secrets, or administrative access publicly. Support may ask for masked values,

domain, version, or installation UUID when troubleshooting.

6. Configure PayPal checkout

QC Membership Manager uses PayPal-hosted Card Fields for paid membership checkout. Card details are entered into PayPal-controlled fields, not stored by QC Membership Manager.

PayPal release behavior

- PayPal is the checkout provider for this release.
- Payments are one-time payments only.
- Recurring billing and PayPal subscription profiles are not included in this release.
- Membership, invoice, and payment records are created only after successful PayPal capture.
- Failed or cancelled payment attempts must not activate access.

PayPal setup steps

16. Open Settings.
17. Choose Sandbox mode while testing or Live mode when ready for real payments.
18. Enter the correct PayPal Client ID and Client Secret for the selected mode.
19. Confirm the currency matches the currency you intend to charge.
20. Save settings.
21. Run a Sandbox checkout before switching to Live mode.

Credential safety

PayPal Client Secrets should never appear in frontend HTML, exports, public logs, support screenshots, or normal status cards.

7. Create and manage membership plans

Plans are the products that members can join. A plan usually includes a name, price, duration, description, detail content, publish state, and Joomla group assignment rules.

Create a plan

22. Open the Plans tab.
23. Click Add Plan.
24. Enter the plan name, price, duration, and description.
25. Add plan detail text and optional display content for the plan detail page.
26. Choose the Joomla user group or groups that active members should receive.
27. Publish the plan when it is ready to appear on the frontend.
28. Save the plan.

Plan content tips

- Use clear benefit-focused names such as Basic Membership, Pro Membership, or Annual Member Access.
- Keep the card description short; use the detail page for longer explanations.
- Use member-facing language. Avoid admin-only notes, internal codes, or setup instructions in frontend plan descriptions.
- Preview the frontend plan list after saving.

8. Connect plans to Joomla user groups

Joomla user groups are the access bridge. When a membership is active, QC Membership Manager can assign the configured plan group so Joomla access rules, menu visibility, articles, downloads, or other protected content can use that membership status.

Group setup guidance

- Create separate Joomla groups for membership access, such as Members, Gold Members, or Course Members.
- Do not assign administrator or super user groups to membership plans.
- Use protected user group IDs to prevent automatic lifecycle actions from touching important system or administrator groups.
- Test group assignment with a normal frontend user before going live.

Access safety

Group changes should be handled server-side by the extension. Do not rely on browser state or hidden fields for access control.

9. Add frontend pages and menu items

Members interact with QC Membership Manager through Joomla frontend views. Create menu items so visitors and members can find the plan list, checkout, and dashboard.

Recommended frontend pages

Page	Recommended purpose
Membership Plans	Shows published plans and lets visitors choose a plan.
Plan Detail	Optional page for a single plan with longer description and signup action.
Checkout	Used when a logged-in user pays for a selected plan.
Member Dashboard	Shows a member their subscription and billing activity.

Menu setup tips

- Use friendly menu titles such as Membership Plans, Join Now, and My Membership.
- Keep checkout accessible to logged-in users.
- Use Joomla access levels and user groups for protected content after membership activation.
- Test pages in a private browser window and with a normal member account.

10. Member checkout walkthrough

The checkout flow is designed to keep payment records clean. Opening checkout or loading PayPal Card Fields should not create a paid invoice or active subscription. Records are created after payment capture succeeds.

Typical paid checkout flow

29. Member logs in or creates an account, depending on your site setup.
30. Member selects a published membership plan.
31. Member opens checkout and reviews the order summary.
32. Member enters card details in PayPal-hosted Card Fields.
33. Member clicks Process Payment.
34. PayPal processes and captures the payment.

35. QC Membership Manager activates the subscription, marks the invoice paid, logs the payment event, and assigns Joomla group access.

What members should see

- Clear plan name and price in the order summary.
- Clear payment instructions without developer terminology.
- Friendly success or failure messages.
- No admin-targeted upgrade messages or internal support diagnostics.

11. Member dashboard walkthrough

The member dashboard gives logged-in members a place to review their membership status and billing activity.

Dashboard areas

Area	What members can review
Membership	Current plan, status, start date, end date, and available renewal or account actions.
Billing	Receipts, payment status, invoice references, credits, refunds, and payment activity where available.

Dashboard wording tips

- Use member-facing labels such as Membership, Billing, Renew, Cancel, and Receipt.
- Avoid words like task, scheduler, capture validation, component params, or feature map in frontend areas.
- Use the Frontend Text tab to customize titles and explanations for your audience.

12. Manage subscriptions

Subscriptions are the membership records tied to users and plans. Admins use the Subscriptions tab to review status, dates, plan assignment, and member access state.

Common statuses

Status	Meaning
Active	The member currently has access through the membership end date.
Expiring	The membership is approaching its end date and may be included in reminder emails.
Expired	The membership has ended and access should be removed or downgraded according to your settings.
Cancelled	The membership has been cancelled or marked to end according to cancellation rules.
Pending payment	A non-active state that may exist from older or manual flows; checkout page views should not create active records.

Admin actions

- Search and filter subscriptions by member, plan, date, or status.
- Confirm active subscriptions have the expected Joomla group access.
- Review renewal and plan-change records where available.
- Use caution when editing active subscriptions because dates and groups affect member access.

13. Billing, payments, refunds, and credits

QC Membership Manager keeps billing records to support receipts, support questions, reporting, and payment history.

Billing record types

Record type	Purpose
Invoice or receipt	Tracks amount, currency, status, taxes, credits, balance, and paid/refunded values.
Payment event	Logs payment lifecycle details such as manual payment, PayPal capture, failed attempts, and support notes.
Account credit	Tracks credit issued to a user and how it is used.
Refund	Records refunded amounts and related notes.

Support-friendly review

- Use payment event details to investigate PayPal order or capture issues.
- Confirm amount and currency before manually adjusting records.
- Never paste full PayPal secrets or private card information into notes.
- Use reports and exports for accounting review when needed.

14. Reports and CSV exports

Reports help admins review membership activity and export data for support, accounting, and operational review.

Available report areas

- Subscriptions and membership status.
- Billing and receipts.
- Payment events and manual payments.
- Refunds.
- Account credits.
- Expiring, expired, and cancelled memberships.
- Plan activity over time.

Export tips

- Filter before exporting so the CSV contains only the records you need.
- Keep exports private because they may contain member and billing information.
- Do not expect exports to include PayPal secrets or sensitive card details.

15. Email templates and lifecycle messages

Email templates let you control member notifications for membership events. Basic license behavior may be plain-text only, while higher tiers may support HTML templates depending on your license.

Template workflow

36. Open Email Templates.
37. Choose the template to edit.
38. Update the title, subject, plain-text body, and HTML body where available.
39. Use supported tokens to personalize member, plan, and membership information.
40. Send a test email to confirm formatting.
41. Save changes.

Email writing tips

- Use clear member-facing language.
- Keep renewal reminders helpful and direct.
- Use plain-text content even when HTML is enabled, so messages remain readable in all email clients.
- Do not include internal IDs unless they are useful for support.

16. Expiration checks and reminder emails

QC Membership Manager can process lifecycle checks to identify expiring or expired memberships, send reminder emails, and update access when memberships end. This behavior uses Joomla Scheduled Tasks where supported by the site and license tier.

What lifecycle checks can do

- Send reminder emails before a membership expires.
- Prevent duplicate reminders through reminder logging.
- Mark memberships expired after the end date.
- Remove plan-assigned Joomla groups while protecting configured system groups.
- Record the outcome for admin review and support troubleshooting.

Testing lifecycle behavior

- Use safe test memberships with short dates before relying on automation.
- Confirm reminders send only once for the same reminder window.
- Confirm expired memberships lose only the intended membership groups.
- Confirm protected user groups are never removed by automated lifecycle actions.

17. Frontend Design and Frontend Text controls

Frontend Design and Frontend Text controls help site owners match QC Membership Manager output to the rest of the site.

Frontend Design

- Adjust layout, spacing, card styling, buttons, borders, colors, and frontend presentation.
- Use consistent styling for plan cards, plan detail pages, checkout, and dashboard areas.
- Preview changes on desktop and mobile.

Frontend Text

- Customize headings, intro text, labels, helper messages, button text, and member-facing instructions.
- Use language that makes sense to members and customers, not developers or site administrators.
- Keep checkout text simple and reassuring.

18. Support tab and downloadable resources

The Support tab gives admins quick access to QuantaCade support, account tools, product information, and downloadable resources.

Main support buttons

Button	Destination
Support Center	https://www.quantacade.com/user/my-profile?qc_profile_tab=support
Open My Profile	https://www.quantacade.com/user/my-profile

Product Page	https://www.quantacade.com/extensions?qc_product=qc-membership-manager
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Resources

Resource	Purpose
User Walkthrough PDF	Download this guide for setup and day-to-day use.
QuantaCade Website	Visit QuantaCade for products, support, account tools, and downloads.

Support information

Support Information can include product, version, product code, domain, saved key, license status, effective tier, and installation UUID. These values help support identify the installation without showing private secrets.

19. Going live checklist

- License validates and effective tier is correct.
- PayPal Sandbox payment completes successfully.
- PayPal Live credentials are entered only when ready for real payments.
- Plan names, descriptions, pricing, and duration are correct.
- Joomla group assignments are safe and tested.
- Checkout page shows the correct plan name and price.
- Successful payment activates the subscription.
- Invoice is marked paid after capture.
- Payment event is logged.
- Member receives the correct Joomla group access.
- Member dashboard shows the correct membership and billing details.
- Reminder emails and expiration checks are tested on safe data.
- Reports and exports work as expected.
- Frontend wording and styling are polished.
- Support tab links and downloadable resources are correct.

20. Troubleshooting

Issue	What to check
License still says pending	Confirm the key was saved, then click Activate or Validate License. Check that the site can contact QuantaCade.
Effective tier is wrong	Confirm the license assigned to the key in your QuantaCade account and revalidate.
PayPal fields do not load	Check PayPal mode, Client ID, Client Secret, currency, browser console, and whether the selected mode credentials match.
Payment fails	Review the checkout message and the payment event details in Reports. Confirm amount, currency, mode, and credentials.
Membership does not activate	Confirm the PayPal capture succeeded and that amount/currency validation passed.
Joomla group not assigned	Check the plan group settings and confirm the group is not protected.
Reminder emails do not send	Confirm lifecycle checks are available for the license tier and that the Joomla Scheduled Task can run.
Frontend wording is not right	Use Frontend Text controls to customize member-facing messages.

21. Glossary

Term	Meaning
Membership plan	A purchasable or assignable membership option with price, duration, description, and access rules.
Subscription	A user membership record tied to a plan and status.
Invoice / receipt	Billing record for an amount due or paid.
Payment event	A log entry describing payment lifecycle activity or support-relevant payment details.
Joomla user group	A Joomla access group used to grant or remove access based on membership state.
Protected user group IDs	Group IDs that automated lifecycle actions should not remove or modify.
Lifecycle check	A scheduled or manual process that handles reminders, expirations, and access cleanup.
Effective tier	The feature tier currently recognized for the installation based on license validation.
Installation UUID	A unique installation identifier used for support and licensing context.