

CREATING YOUR MEMBERSHIP SITE WITH MEMBERPRESS

Plugin Setup Checklist

Use the following checklist to ensure you don't miss anything whilst setting up your membership plugin.

INITIAL CONFIGURATION

- Download the MemberPress plugin and copy your license code
- Install the plugin via your WordPress site (or FTP if you prefer)
- Add your MemberPress license key on the 'Activate' page
- Go to 'Options' and select the Info tab – add your business details name and address then click update options button

- Go to the Pages tab under 'Options'
 - Select your Account, Login and Thank You pages or set these to Auto Create
 - Check account page is styled correctly
 - Customize login page (you will need to view in incognito window)
 - Add content to your thank you page
 - Change the group and membership pages slugs if required
 - Ensure 'Redirect unauthorized visitors to a specific URL' is ticked
 - Add the link you want non-members to be sent to if they go to a membership page
 - Select whether you want to show excerpts to non-members
 - Select whether to show a login form on your unauthorised access page
 - Click 'Default Unauthorized Message' link if you would like to create a message here

- Add the default message shortcode [mepr-unauthorized-message] to your unauthorised access page

FEATURE CONFIGURATION

- Go to Account tab under 'Options'
 - Select to disable WordPress admin bar
 - Select to keep members out of admin dashboard
 - Select to allow members to cancel their subscriptions (if relevant)
 - Select to allow membership pausing (if relevant)
 - Set enforce minimum password strength to medium
 - Select to disable WordPress registration (unless using other plugins that need this)
 - Enable coupon field if currently going to offer coupons
 - Enable subscription pro-rating if offering upgrades
 - Disable 1-day grace period if you want confirmation of payment before member can access content
 - Select require terms of service (if relevant) and add page link
 - Select to force WordPress to use MemberPress login page (unless other plugins require the WP login)
 - Add your member dashboard link under 'url to direct member to after login' (or account page link if preferred)
 - Add your homepage (or another page) as 'url to direct member to after logout'
 - Enter a welcome message for the account page
- Go to Fields tab under 'Options'
 - Select whether you want to show and require address on registration

- Add any custom fields if you want to collect additional information

- Go to General tab under 'Options'
 - Select language
 - Select currency
 - Select currency symbol
 - Select whether to authorise or block search engines
 - Enable paywall if using this feature and enter number of free views

PAYMENT INTEGRATION & TAXES

- Go to Payments tab under 'Options'
 - Enable chosen payment type (or types)
 - Follow integration steps for your payment type

- Go to Taxes tab under 'Options'
 - Enable tax calculations if required
 - Select prices entered with/without tax
 - Select address for tax calculations
 - Select to enable VAT and choose country
 - Upload any required tax rates as a CSV file

EMAILS & MAILING LIST INTEGRATION

- Go to Marketing tab under 'Options'
 - Enable your email marketing system
 - Follow integration instructions (usually need API from your email marketing service account)
 - Choose a global list for ALL signups to be added to

- Select to enable opt-in check box if desired
 - Edit opt-in check box text
 - If opt-in checkbox enabled select 'Opt-in checked by default' at top of the page
 - Select to disable global autoresponder list if membership level only lists to be used
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- Go to Emails tab under 'Options'
 - Enter correct from name and email address
 - Select which emails you would like members to receive
 - Customize your welcome email
 - Customize any other emails set to be sent
 - Enter email address for admin notifications
 - Select which emails you want to receive

CREATING MEMBERSHIP PRODUCTS

- Go to 'Memberships' and click 'Add New'
 - Enter a name for your membership level/product
 - Enter some text about your membership (i.e. reminder of what they are signing up for)
 - Set your membership pricing in the 'Membership Terms' box
 - Select a custom page template if needed (i.e full width)
 - Under 'Discussion' deselect 'Allow Comments'

- Under 'Membership Options' on your membership level page:
 - Customize registration button text
 - Select send membership specific welcome email (if required) and edit email
 - Customize payment and user field options if required

- Under Permissions tab select who can purchase the product
- Edit Price Box tab if using MemberPress Groups feature
- Under Advanced tab add your member dashboard link to the Membership Access URL field
- Add a custom login URL if required
- Select a mailing list for the membership level (if different to your global list)
- Publish your page

- Go to 'Groups' if setting up pricing tiers or an upgrade path
 - Enter group name
 - Select whether upgrade path
 - Add the relevant membership levels
 - Choose a pricing page theme
 - Publish to save

CONTENT PROTECTION & DRIPPING

- Go to 'Rules' and 'Add New'
 - Select type of content to protect under Rule Options
 - Select membership levels that have access to this rule
 - Enable drip if required and select drip settings
 - Enable expiration if required and select expiration settings
 - Click 'Save Rule'
 - Repeat for as many content types as required

COUPON CREATION

- Go to 'Coupons' if needed and click 'Add New'
 - Add discount amount and select percentage or price
 - Add number of uses

- Select expiration date
- Select membership levels coupon can be used for
- Set trial override if needed

REMINDER EMAILS

- Go to 'Reminders' and click 'Add New'
 - Set trigger to 'after signup abandoned'
 - Edit email
 - Publish
 - Set up any other reminders needed (such as credit card expiry)

SITE TESTING

- Test your signup process in an incognito window (or whilst logged out of your site)
 - Test different payment processors being used
 - Check emails are received
 - Check added to mailing list
 - Check you are taken to the correct thank you page
 - Check login process and correct after login page seen
 - Check have correct access to posts/pages
 - Test upgrade options if enabled
 - Test cancellation process