MIGRATION GUIDE

HOW TO TRANSFER YOUR EXISTING MEMBERSHIP SITE TO MEMBERMOUSE

SECTIONS

Things to consider before migrating

After deciding on making MemberMouse your new membership solution, there are still some things to consider. Though the following may not offer a complete list of ideas for your specific needs, we've included some important steps that will help you as you move forward with your migration.

I. IDENTIFY THE NECESSARY DATABASE FIELDS

A database field is what WordPress, MemberMouse, and most other membership solutions use to store and reference important information regarding your membership needs. A typical database area has potentially dozens of different data points like: id, first name, last name, email, address, etc. For a better idea of membership details used for importing members to MemberMouse, you can download the template import file here and find detailed explanations of each column in this guide (p. 10).

During any type of migration (moving data from one membership database to a new system) you must decide which data you're taking with you and ensure it has a place to "reside" in your new system. Before taking too many steps, it's important to understand how much data you can or want to migrate to MemberMouse, where it's coming from (pricing settings, membership options, push/email settings, etc.) and what state it's in. Think of this migration process like a move into a new house. You wouldn't pack or ship things that are broken, no longer fit your needs, or are no longer going to be used. Often times, you start decluttering when you are getting ready to move/migrate. It can take a while to go through data in some systems and decide what to fix, keep, or trash. The complexity and duration of your specific migration is heavily determined by the amount of information you have, the number of database fields, any customizations you need, and the cleanliness of all of your data.

II. IMPORTANT FACTORS IN MIGRATING

The data migration process is a time for important decisions: which information are you able to migrate to the new system, which parts do you keep, and which do you leave behind? (in a backup file of course)

Though it can be hard to say goodbye to certain aspects or ways of doing things, this is a good time to consider any necessary house cleaning needs. Remember, the more data, the longer the migration.

After a while, databases can become full of information that once provided good information or intent, but was never actually used for anything. **Only migrate data you are currently using**, not data you are currently "collecting" or letting sit there not being used. If you're not using certain data in your system now, and have no solid plans to use it in the near future, don't worry about migrating it to the new MemberMouse system.

Another point that is sometimes a touchy subject, is financial information. Regardless of where you are migrating to or from, the systems will most likely not be capable of recreating/importing all the back history (including previous information such as purchases, emails, or other events) that tie to the financial transactions.

III. GET YOUR DATA IN SHAPE FOR MIGRATION

- Determine the organization or cleanliness of the information you will be migrating: how accurate, complete, and current is it.
- Delete or merge duplicate data.
- Purge old/un-needed data.
- Clean up inaccurate or incomplete data, for example, bad email and mailing addresses.
- Fix poorly formatted data so it conforms to UTF8 rules (usually noted by the � character in your customer data).

IV. MINI MIGRATION CHECKLIST

Users typically setup the following areas first before fully migrating members:

- Configure your Products/Pricing (one-time, recurring subscription, fixed number of payments, etc.)
- Create Membership Levels (only one can be associated with a user)
- Create Bundles needed (since an unlimited number can be applied per user, this is usually used as add-ons, course options, etc.)
- Payment Settings (PayPal, Stripe, etc.)
- Email integration and Push Notifications
- Customize checkout pages and core pages as needed
- Administrative/Employee Roles
- *If desired*, setup a 'legacy' option to migrate any open recurring subscriptions. This is detailed in the Transfer Billing section of this guide (p.15).

If you want make sure MemberMouse payment settings are in charge of all of your users payments, do your best to close as many open subscriptions as possible before migrating, and get them to sign up again on your new system using a MemberMouse purchase link. Some systems, like MemberMouse, will allow you to export historical financial transactions, making it available for viewing later if needed.

For more specific information on MemberMouse's recommend approach to migrating your members and getting them switched to the new system payment management, review the steps in the following section of this guide, *Coming from another membership solution.*

Coming from another membership solution (overview)

Coming from another membership solution

I. CREATE A MEMBERSHIP LEVEL (OR LEVELS, AS NEEDED)

Before you import, create a new membership level, which is going to be a legacy version of your active levels. Call it 'Legacy' or whatever you like, and since it is just for the import, you will not even need a product. It should have the same content access, etc, as your existing level, but this 'Legacy' membership level will be set to expire. The expiration period is the length of your billing cycle (i.e. 1 week, 1 month).

If you have different membership levels with different access, then create one Legacy level for each (Legacy A, Legacy B, etc.)

1. In the MemberMouse menu, go to *Product Settings* and click on the *Membership Levels* tab.

2. Click 'Create Membership Level'.

3. A dialog box will pop up containing all of the options available for configuring the membership level. The following steps will show you what to choose for each available option. However, if you'd like to learn more, you can consult the Membership Level Options table.

4. Set the Name of the membership level as "Legacy [name of original membership level]". For example, Legacy Bronze Membership.

Do you want to hide the WordPress admin bar from your members?

To instruct MemberMouse to hide the WordPress admin bar from new members, go to *General Settings > Other Settings*. In the WordPress User Options section, check the check box next to 'Hide the admin bar for new members'.

If you leave the box unchecked whether or not the admin bar will be shown to new members will be based on settings in WordPress or another plugin.

5. Set the Status as 'Active'.

6. For WordPress role, keep it as 'Don't Set or Change Role'.

7. Set the Membership Type as 'Free'. Even if this is usually a paid membership level, you will not be using this legacy level for billing purposes.

8.Click the checkbox next to 'Membership Level Expires'. Choose the length of time that's equivalent to one of your billing cycles. For this example, choose '1 month'.

9. The 'Send a Welcome Email to New Members' is checked by default. A sample email is already filled out for you, and you can customize this however you'd like. This article provides more details about creating a welcome email.

If you do not wish to send an email upon import, you can uncheck this box. Note: You are also given the option to bypass the welcome email in the Import Wizard settings.

10. If you have created bundles, choose any bundles that you'd like these legacy members to have access to while on this expiring membership level.

11. Click on 'Save Membership Level'.

See the next page for an image of what your membership level configuration will look like...

Your Membership Level configuration will look like this:

Create Membership Level   ✕

Name*   Legacy Bronze Membership

Status ⓘ   ⦿ Active   ◯ Inactive

Wordpress Role ⓘ   — Don't set or change role — ⇕

Membership Type   ⦿ Free   ◯ Paid
                    Free Membership Description *(optional)* ⓘ

Expiry Settings   ☑ Membership Level Expires
                    Expires After 1   Months ⇕

Welcome Email   ☑ Send welcome email to new members

                    From MemberMouse Support (support@membermo ⇕   add employees

                    Subject* Welcome [MM_Member_Data name='firstName']!

                    Body* 📄 🔍 *Note: Only certain SmartTags can be used here* ⓘ

                    Hi [MM_Member_Data name='firstName'],

                    Thanks for joining our community!

                    You can login with the following credentials:
                    Username: [MM_Member_Data name='username']
                    Password: [MM_Member_Data name='password']

                    <a href="[MM_CorePage_Link type='homepage'

Bundles ⓘ

                    Select Multiple Bundles: PC `ctrl + click` Mac ⌘ `(Command key) + click`

Protected Categories ⓘ

                    Select Multiple Categories: PC `ctrl + click` Mac ⌘ `(Command key) + click`

                                            Save Membership Level   Cancel

II. IMPORT YOUR MEMBERS USING THE IMPORT WIZARD

The Import Wizard will import all of your members, their account information and their appropriate access rights into MemberMouse. Watch video.

MemberMouse integrates seamlessly with WordPress' user system. This means that when a MemberMouse member is created, a WordPress user is automatically created as well. At that time, WordPress will send out a *Change Password Email* to those new users. If you import members with an email address that matches an existing WordPress user, then the import wizard will automatically convert them to MemberMouse members while keeping their original WordPress user account intact.

A. *Prep your .csv file(s).*

1. In the MemberMouse menu go to *Manage Members* and click on the 'Import Members' button. This will take you to the Import Wizard page.

2. Next, click the 'Download Import Template' button. This will prompt a .csv file download onto your computer titled: *mm_import_template.csv*

3. Download a new .csv file for each membership level and rename the file as the membership level to help stay organized.

4. Open the file and add a row for each member you want to import. The column headers represent the fields that MemberMouse will recognize when importing your member's information. All columns must be present and in the order they appear in the template for the Import Wizard to process the data correctly. **Make sure not to delete any of the columns or rearrange them.**

5. Imports are done one membership level at a time so create a .csv file for each membership level you want to import members for and populate it with the appropriate member data.

CAUTION
Make sure that the email address(es) you have linked to your administrator account(s) and any additional employee accounts are not present in the import .csv file.
If these are included, a member account will be created and admin/ employee rights will be revoked. Therefore you won't be able to log into your WordPress admin area with that account anymore.

PRO TIP
If you want to add additional member data not included in one of the column headers, create a Custom Field. Then add the additional columns to the .csv file after the *Bundle Expiration Dates* column.

Import Wizard template in detail.

USERNAME *optional*	Enter the member's username. If you leave the username field blank, then MemberMouse will automatically assign the email as the username
EMAIL ADDRESS *required*	Enter the member's email address. This field is required and must be unique.
PHONE NUMBER *optional*	Enter the member's phone number. Phone numbers require no particular format. Example: 123-123-1234 or 12312312345
REGISTRATION DATE *optional*	Enter the member's registration date. Registration date should be expressed as a date: MM/DD/YYYY (i.e. 1/25/2013). If you choose to leave this field blank, the new member's registration date will be set to today's date.
EXPIRATION DATE *optional*	Enter the member's expiration date. You only need to pay attention to this field if you're importing members into a Membership Level that's configured to expire. Expiration Date should be expressed as a date: MM/DD/YYYY (i.e. 1/25/2013). If you choose to leave this field blank, the new member's expiration date will be calculated based on their registration date and the expiring membership level's configuration. For example, if the membership level is configured to expire after a month and the registration date is 1/1/2013, if you don't specify an expiration date, it will be set to 2/1/2013.
PASSWORD *optional*	If you have access to a member's current password or you want to create a default password that members can change when they first log in, enter it here in a human-readable format (i.e. Password1234!). MemberMouse will take care of encrypting the password when it's inserted in your member database. If you do not enter anything into this field, MemberMouse will automatically generate a random password for each member. You can send passwords to imported members via the welcome email associated with the membership level. IMPORTANT: If you're importing members with email addresses or usernames that are already associated with existing WordPress users then the password field will be completely ignored. WordPress users that are migrated to MemberMouse members will just login using the same password they're already using. As a result of this, MemberMouse will have no knowledge of what the member's password is so using the [MM_Member_Data name='password'] SmartTag will return nothing for these members.

Import Wizard template in detail. (continued...)

FIRST NAME *optional*	Enter the member's first name.
LAST NAME *optional*	Enter the member's last name.
BILLING ADDRESS *optional*	Enter the member's billing address.
BILLING CITY *optional*	Enter the member's billing city.
BILLING STATE *optional*	Enter the member's billing state.
BILLING ZIP CODE *optional*	Enter the member's billing zip code.
BILLING COUNTRY *optional*	Enter the member's billing country. Use two-digit ISO country codes.
SHIPPING ADDRESS *optional*	Enter the member's shipping address.
SHIPPING CITY *optional*	Enter the member's shipping city.
SHIPPING STATE *optional*	Enter the member's shipping state.
SHIPPING ZIP CODE *optional*	Enter the member's shipping zip code.
SHIPPING COUNTRY *optional*	Enter the member's shipping country. Use two-digit ISO country codes.
STATUS *optional*	Enter the status you want to apply to the member's account by supplying the desired status ID. If no status is specified, accounts will be marked as Active. See this article to learn more about account statuses. Below is a list of valid status IDs: 1 = Active 2 = Canceled 3 = Locked 4 = Paused 5 = Overdue 6 = Pending 7 = Error 8 = Expired

Import Wizard template in detail. (continued...)

BUNDLES *optional*	If you want to apply one or more bundles to a member's account, enter the bundle ID(s) in this field. You can look up bundle IDs right from the Import Wizard by clicking the 'Lookup IDs' button. An ID Lookup dialog will pop-up. Select Bundles from the dropdown menu to see the list of bundles in the system along with the ID associated with each bundle found in the ID column. In order to assign multiple bundles to a member's account just separate each bundle ID with a pipe character (|). For example: 1|3|8
BUNDLE STATUS *optional*	Enter the status you want to apply to each bundle being applied to the member's account by supplying the desired status ID. If no status is specified, bundles will be marked as Active. See this article to learn more about bundle statuses. Below is a list of valid status IDs: 1 = Active 2 = Canceled 4 = Paused 5 = Overdue 8 = Expired In order to set the status for multiple bundles just separate each status ID with a pipe character (|). For example: 1|2|4 Note that each status ID should correctly correlate to a bundle ID listed in the Bundles column. For example, if you have 1|4 in the Bundles column, this means that you want to apply bundles 1 and 4 to the member's account. So if you want to set the status of bundle 1 to Canceled (status ID of 2) and the status of bundle 4 to Active (status ID of 1) you would enter this 2|1.
BUNDLE START DATES *optional*	Enter the start date you want to use for each bundle being applied to the member's account by supplying a date in the format MM/DD/YYYY (i.e. 1/25/2013). If you choose to leave this field blank, the bundle's start date will be set to today's date. In order to set the start date for multiple bundles just separate each date with a pipe character (|). For example: 1/1/12|2/3/12|3/5/12 Note that each date should correctly correlate to a bundle ID listed in the Bundles column. For example, if you have 1|4 in the Bundles column, this means that you want to apply bundles 1 and 4 to the member's account. So if you want to set the start date of bundle 1 to 1/1/12 and the start date of bundle 4 to 3/5/12 you would enter this 1/1/12|3/5/12.

Import Wizard template in detail. (continued...)

BUNDLE EXPIRATION DATES *optional*	Enter the expiration date you want to use for each bundle being applied to the member's account by supplying a date in the format MM/DD/YYYY (i.e. 1/25/2013). You only need to pay attention to this field if you're applying bundles that configured to expire. If you choose to leave this field blank, the bundle's expiration date will be calculated based on the bundle's start date and the expiring bundle's configuration. For example, if the bundle is configured to expire after a month and the start date is 1/1/2013, if you don't specify an expiration date, it will be set to 2/1/2013. In order to set the expiration date for multiple bundles just separate each date with a pipe character (|). For example: 1/1/12|2/3/12|3/5/12 Note that each date should correctly correlate to a bundle ID listed in the Bundles column. For example, if you have 1|4 in the Bundles column, this means that you want to apply bundles 1 and 4 to the member's account. So if you want to set the expiration date of bundle 1 to 1/1/12 and the expiration date date of bundle 4 to 3/5/12 you would enter this 1/1/12|3/5/12.
CUSTOM FIELDS COLUMNS *optional*	If you have custom fields configured in MemberMouse and you want to import data into those custom fields, you need to add additional columns to the .csv file after the Bundle Expiration Dates column. The name of the column is extremely important and it needs to be in the following format: Custom Field {custom_field_id} Where {custom_field_id} will be replaced by the ID of the custom field in MemberMouse. For example, if you have a custom field that stores a member's birthday and the ID of that custom field is 4, you would need to name the column Custom Field 4. You can look up custom field IDs from the Import Wizard by clicking the LOOKUP IDS button. Select Custom Fields from the drop down menu to see the list of custom fields along with the ID associated with each. **Note:** When importing data for a custom field that's a check box, use the following values to indicate checked or unchecked: mm_cb_on and mm_cb_off.

B. *Upload your .csv file(s).*

1. Go back to the Import Wizard page in MemberMouse and upload the .csv import file by clicking the 'Browse' button and navigating to the appropriate .csv file. You can also optionally specify a URL where the .csv file is hosted.

2. Select the membership level from the drop down menu that corresponds to the member data contain in the .csv file you selected.

3. You can optionally choose to send a welcome email to all new members being imported by checking the box next to 'Send welcome email to new members'. If you do choose this option, it will send the welcome email that you configured while creating the membership level.

EXTRA: If you're having MemberMouse automatically generate passwords, you can configure the welcome email to deliver the passwords to your members. If you want to do this, be sure to configure the welcome email template for the appropriate membership levels prior to doing an import.

4. Click the 'Import Members' button.

5. Following the import, MemberMouse will display the results of the import including what members were imported, what bundles were applied to their account and if any errors were encountered.

IMPORT COMPLETED SUCCESSFULLY (6.35 secs)

102 members imported

```
ROW 2: ADDING NEW MEMBER 'importdemo@membermouse.com':
       MEMBER ADDED SUCCESSFULLY
       BUNDLE ID '6' ADDED SUCCESSFULLY
```

6. Click the 'Import More Members' button to repeat the process and import additional members.

WORDPRESS TIP #1
MemberMouse integrates seamlessly with WordPress' user system. This means that when a MemberMouse member is created, a WordPress user is automatically created as well. At that time, WordPress will send out a Change Password Email to those new users.

III. TRANSFER BILLING

A. *Create a push notification.*

Create a push notification that triggers an email to be sent to the customer when the Legacy membership expires.

1. From the WordPress Dashboard, go to *MemberMouse > Developer Tools* and then click on the *Push Notifications* tab.

2. Click the 'Create Push Notifications' button and a dialog will pop up where you'll configure the email notification.

3. Make sure that Status is set to 'Active'.

4. Under the *When the following event occurs...* heading, select 'Membership Status Changed' from the drop down.

5. After selecting this another section will show up. Under the *When membership level is...* heading, you can select your Legacy level to indicate that this notification should be triggered only by that membership level..

6. Under the *When membership status is...* heading, you can select 'Expired'.

B. *Create an email to send to your customer.*

1. Under the *Perform the following action...* heading, select 'Send Email' from the drop down.

2. Select 'Current Member' next to the *To:* label indicating that the notification email should be sent to the customer

3. Choose who the email is sent from by selecting an employee from the dropdown next to the *From:* label. This dropdown contains all of the

WORDPRESS TIP #2
If you import members with an email address that matches an existing WordPress user, then the import wizard will automatically convert them to MemberMouse members while keeping their original WordPress user account intact.

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employee accounts currently created in the MemberMouse system. Learn more about Employee Accounts.

If you would like additional recipients to be notified, you can add them next to the *cc:* label by adding the email addresses, using commas to separate multiple email addresses.

4. In the email, you will let your customer know that the level expired and ask them to re-sign up by **including a purchase link** for their equivalent, non-expiring membership level in MemberMouse. You can even put in some special copy explaining your site migration. The customer can choose to use their existing username and password (Recommended) or create a new username and password. You can find a sample version of this email, in the FAQs section of this guide.
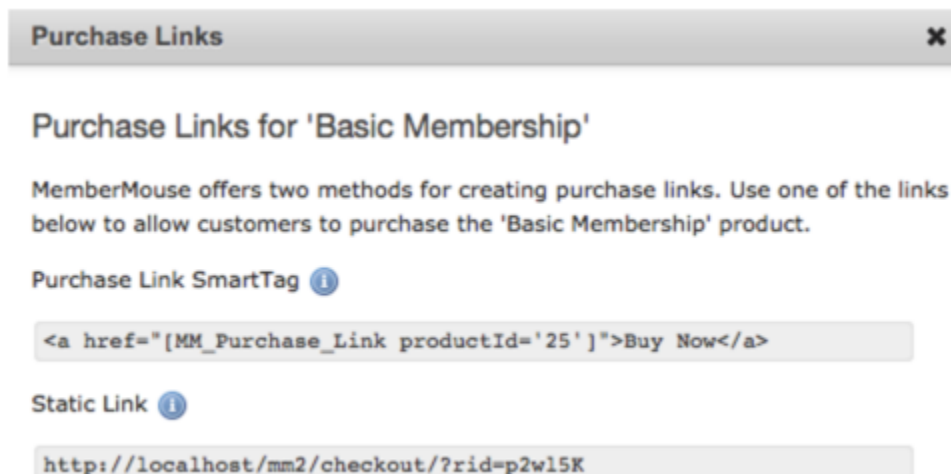
5. Click the 'Save Push Notification' button.

C. *How to look up a purchase link for your email.*

1. In the MemberMouse menu go to *Product Settings*, and click on the 'Products' tab.

2. In the *Purchase Links* column, click on the [🏧] button next to the item you would like to generate a purchase link for.

3. The following Purchase Links dialog box will pop up:

Purchase Links   ✖

Purchase Links for 'Basic Membership'

MemberMouse offers two methods for creating purchase links. Use one of the links below to allow customers to purchase the 'Basic Membership' product.

Purchase Link SmartTag ⓘ

```
<a href="[MM_Purchase_Link productId='25']">Buy Now</a>
```

Static Link ⓘ

```
http://localhost/mm2/checkout/?rid=p2wl5K
```

4. The Purchase Link SmartTag is one of several SmartTags that can be included in an email created as part of a push notification. Copy and paste the Purchase Link SmartTag.

D. *Billing is re-established.*

Once your members click on the Purchase Link in the email, they will be taken to the dynamic Checkout core page on your site. Here they'll fill out billing information and re-purchase their membership via MemberMouse. The connection between MemberMouse and the payment gateway is established, and MemberMouse will take care of recurring billing.

You will need to manually cancel any active subscription for the customer that you have in your current billing system at this point.

Not yet a member? Start your 14 day free trial today!

Importing Existing WordPress Users (overview)

I Import your members using the Import Wizard.
Watch video.

A Prep your .csv file. (p.20)

B Upload your .csv file. (p.25)

Importing Existing WordPress Users

If you already have a WordPress site but haven't been using a membership solution prior to MemberMouse, then your current members may already exist as WordPress users in the database. If this is the case, you can easily migrate these users into MemberMouse by using the Import Wizard. Just create an import file that contains the email addresses of the users to migrate and run the import wizard. Importing is done on a per membership level basis. Users will not be able to access the member pages until imported to MemberMouse.

The Import Wizard acts as an updater. Any information already in WordPress will be used for the new member, so **to import an existing user, all that is needed is an email address**. If you do enter a password into the import file for an existing user, it will be ignored.

Do you want to hide the WordPress admin bar from your members?

To instruct MemberMouse to hide the WordPress admin bar from new members, go to *General Settings > Other Settings*. In the WordPress User Options section, check the check box next to 'Hide the admin bar for new members'.

If you leave the box unchecked whether or not the admin bar will be shown to new members will be based on settings in WordPress or another plugin.

I. IMPORT YOUR MEMBERS USING THE IMPORT WIZARD

A. *Prep your .csv file(s).*

1. In the MemberMouse menu go to *Manage Members* and click on the 'Import Members' button. This will take you to the Import Wizard page.

2. Next, click the 'Download Import Template' button. This will prompt a .csv file download onto your computer titled: mm_import_template.csv

3. Download a new .csv file for each membership level and rename the file as the membership level to help stay organized.

4. Open the file and add a row for each member you want to import. The column headers represent the fields that MemberMouse will recognize when importing your member's information. All columns must be present and in the order they appear in the template for the Import Wizard to process the data correctly. **Make sure not to delete any of the columns or rearrange them.**

5. Imports are done one membership level at a time so create a .csv file for each membership level you want to import members for and populate it with the appropriate member data.

PRO TIP

If you want to add additional member data not included in one of the column headers, create a Custom Field. Then add the additional columns to the .csv file after the Bundle Expiration Dates column.

Import Wizard template in detail.

USERNAME *optional*	Enter the member's username. If you leave the username field blank, then MemberMouse will automatically assign the email as the username
EMAIL ADDRESS *required*	Enter the member's email address. This field is required and must be unique.
PHONE NUMBER *optional*	Enter the member's phone number. Phone numbers require no particular format. Example: 123-123-1234 or 12312312345
REGISTRATION DATE *optional*	Enter the member's registration date. Registration date should be expressed as a date: MM/DD/YYYY (i.e. 1/25/2013). If you choose to leave this field blank, the new member's registration date will be set to today's date.
EXPIRATION DATE *optional*	Enter the member's expiration date. You only need to pay attention to this field if you're importing members into a Membership Level that's configured to expire. Expiration Date should be expressed as a date: MM/DD/YYYY (i.e. 1/25/2013). If you choose to leave this field blank, the new member's expiration date will be calculated based on their registration date and the expiring membership level's configuration. For example, if the membership level is configured to expire after a month and the registration date is 1/1/2013, if you don't specify an expiration date, it will be set to 2/1/2013.
PASSWORD *optional*	If you have access to a member's current password or you want to create a default password that members can change when they first log in, enter it here in a human-readable format (i.e. Password1234!). MemberMouse will take care of encrypting the password when it's inserted in your member database. If you do not enter anything into this field, MemberMouse will automatically generate a random password for each member. You can send passwords to imported members via the welcome email associated with the membership level. IMPORTANT: If you're importing members with email addresses or usernames that are already associated with existing WordPress users then the password field will be completely ignored. WordPress users that are migrated to MemberMouse members will just login using the same password they're already using. As a result of this, MemberMouse will have no knowledge of what the member's password is so using the [MM_Member_Data name='password'] SmartTag will return nothing for these members.

Import Wizard template in detail. (continued...)

FIRST NAME *optional*	Enter the member's first name.
LAST NAME *optional*	Enter the member's last name.
BILLING ADDRESS *optional*	Enter the member's billing address.
BILLING CITY *optional*	Enter the member's billing city.
BILLING STATE *optional*	Enter the member's billing state.
BILLING ZIP CODE *optional*	Enter the member's billing zip code.
BILLING COUNTRY *optional*	Enter the member's billing country. Use two-digit ISO country codes.
SHIPPING ADDRESS *optional*	Enter the member's shipping address.
SHIPPING CITY *optional*	Enter the member's shipping city.
SHIPPING STATE *optional*	Enter the member's shipping state.
SHIPPING ZIP CODE *optional*	Enter the member's shipping zip code.
SHIPPING COUNTRY *optional*	Enter the member's shipping country. Use two-digit ISO country codes.
STATUS *optional*	Enter the status you want to apply to the member's account by supplying the desired status ID. If no status is specified, accounts will be marked as Active. See this article to learn more about account statuses. Below is a list of valid status IDs: 1 = Active 2 = Canceled 3 = Locked 4 = Paused 5 = Overdue 6 = Pending 7 = Error 8 = Expired

Import Wizard template in detail. (continued...)

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BUNDLE START DATES *optional*	Enter the start date you want to use for each bundle being applied to the member's account by supplying a date in the format MM/DD/YYYY (i.e. 1/25/2013). If you choose to leave this field blank, the bundle's start date will be set to today's date. In order to set the start date for multiple bundles just separate each date with a pipe character (|). For example: 1/1/12|2/3/12|3/5/12 Note that each date should correctly correlate to a bundle ID listed in the Bundles column. For example, if you have 1|4 in the Bundles column, this means that you want to apply bundles 1 and 4 to the member's account. So if you want to set the start date of bundle 1 to 1/1/12 and the start date of bundle 4 to 3/5/12 you would enter this 1/1/12|3/5/12.

Import Wizard template in detail. (continued...)

BUNDLE EXPIRATION DATES *optional*	Enter the expiration date you want to use for each bundle being applied to the member's account by supplying a date in the format MM/DD/YYYY (i.e. 1/25/2013). You only need to pay attention to this field if you're applying bundles that configured to expire. If you choose to leave this field blank, the bundle's expiration date will be calculated based on the bundle's start date and the expiring bundle's configuration. For example, if the bundle is configured to expire after a month and the start date is 1/1/2013, if you don't specify an expiration date, it will be set to 2/1/2013. In order to set the expiration date for multiple bundles just separate each date with a pipe character (|). For example: 1/1/12|2/3/12|3/5/12 Note that each date should correctly correlate to a bundle ID listed in the Bundles column. For example, if you have 1|4 in the Bundles column, this means that you want to apply bundles 1 and 4 to the member's account. So if you want to set the expiration date of bundle 1 to 1/1/12 and the expiration date date of bundle 4 to 3/5/12 you would enter this 1/1/12|3/5/12.
CUSTOM FIELDS COLUMNS *optional*	If you have custom fields configured in MemberMouse and you want to import data into those custom fields, you need to add additional columns to the .csv file after the Bundle Expiration Dates column. The name of the column is extremely important and it needs to be in the following format: Custom Field {custom_field_id} Where {custom_field_id} will be replaced by the ID of the custom field in MemberMouse. For example, if you have a custom field that stores a member's birthday and the ID of that custom field is 4, you would need to name the column Custom Field 4. You can look up custom field IDs from the Import Wizard by clicking the LOOKUP IDS button. Select Custom Fields from the drop down menu to see the list of custom fields along with the ID associated with each. **Note:** When importing data for a custom field that's a check box, use the following values to indicate checked or unchecked: mm_cb_on and mm_cb_off.

B. *Upload your .csv file(s).*

1. Go back to the Import Wizard page in MemberMouse and upload the .csv import file by clicking the 'Browse' button and navigating to the appropriate .csv file. You can also optionally specify a URL where the .csv file is hosted.

2. Select the membership level from the drop down menu that corresponds to the member data contain in the .csv file you selected.

3. You can optionally choose to send a welcome email to all new members being imported by checking the box next to "Send welcome email to new members".

EXTRA: If you're having MemberMouse automatically generate passwords, you can configure the welcome email to deliver the passwords to your members. If you want to do this, be sure to configure the welcome email template for the appropriate membership levels prior to doing an import.

4. Click the 'Import Members' button.

5. Following the import, MemberMouse will display the results of the import including what members were imported, what bundles were applied to their account and if any errors were encountered.

IMPORT COMPLETED SUCCESSFULLY (6.35 secs)

102 members imported

```
ROW 2: ADDING NEW MEMBER 'importdemo@membermouse.com':
       MEMBER ADDED SUCCESSFULLY
       BUNDLE ID '6' ADDED SUCCESSFULLY
```

6. Click the 'Import More Members' button to repeat the process and import additional members.

WORDPRESS TIP #1
MemberMouse integrates seamlessly with WordPress' user system. This means that when a MemberMouse member is created, a WordPress user is automatically created as well. At that time, WordPress will send out a Change Password Email to those new users.

Frequently Asked Questions

1. *Is there a way to transfer the billing automatically for the customer?*

No. There are two possible ways to get your legacy customers switched over from your current billing system to having MemberMouse be in charge of billing. One is described in detail in the "Coming From Another Membership Solution" section of this guide under the Transfer Billing heading (p. 15). A second method is to set up a system of watching these accounts, whether manually or automatically via a custom script or push notification, and keep a lookout for natural billing events (i.e. upcoming rebills, card declines, etc). When these events arise you can reach out to the customer, provide them with a MemberMouse purchase link and suggest that they use that link to update their subscription.

Once they start billing on MemberMouse, you'll need to manually cancel any active subscription they have in your current billing system.

2. *Can I migrate the payment vendor accounts from my old membership plugin to MemberMouse?*

Yes.   If you are using another membership plugin and you have existing accounts with payment vendors, you can use those same accounts with MemberMouse.   **However...** you will need to be aware of the way that an integration with a payment vendor works, because while you can use the same account, your members' billing information cannot be transferred.

When you configure your MemberMouse site to work with a payment vendor, you are establishing a two way connection between your site and that vendor.   The key to that connection is a transaction ID that is created by MemberMouse for every transaction.   It is this unique transaction ID that MemberMouse transmits to your payment vendor along with the member's payment details and billing instructions.   Inversely, when a successful payment is received to the vendor, it transmits back to MemberMouse that confirmation, using the transaction ID to specific what the payment was for.

When you migrate your users over from another membership plugin, the one thing that MemberMouse cannot do is capture the transaction IDs used by your previous plugin. In the Import Wizard template, you are setting each member up with specific settings; what products they have, what membership level they have, etc. But because those purchased did not originate within MemberMouse, there is no transaction ID associated with them.

The only time this is relevant is when a member, who has a recurring billing product, attempts to cancel their account or subscription, or if a payment is missed. If a customer cancels their account in MemberMouse on a product that was purchased initially via MemberMouse, MemberMouse will transmit to your payment vendor a request to cancel any recurring billing for that member associated with that specific transaction ID. Because that ID exists within the payment vendor, then the billing is canceled. But for imported members, there is no transaction ID, and thus no way for MemberMouse to tell your vendor to cancel. The same is true in reverse order, if a member cancels any billing via their payment account (usually this happens only in PayPal), then the payment vendor will transmit back to MemberMouse a request to cancel and a transaction ID, which does not exist in MemberMouse, and thus no action is taken. The same action takes place on missed payment (say if a member cancels their PayPal account, or there are insufficient funds).

3. *How can I change the URL associated with my license?*

This information applies if the only thing that's changing is your URL. If you're looking to migrate your **current** MemberMouse site to another server in addition to changing the URL then refer to our article: Migrating MemberMouse to a New Server.

In order to change the authorized URL associated with your MemberMouse license, we recommend following these steps below:

1. Put your site into maintenance mode.

2. Deactivate the MemberMouse plugin.

3. Log into membermouse.com and click on 'My Account' in the menu sidebar on the right side of the page.

4. In the *License Management* section at the top of the page, click on the 'Change URL' button. This will make the URL field editable.

🔍 License Management			request additional licenses
Plan	**Authorized URL**	**Members Used** ℹ️	**Upgrade** ℹ️
Advanced (Active)	http://yoursitegoeshere.com	—	Choose a Plan ▾
Get Support PIN	**Change URL**		Upgrade

5. In the 'Authorized URL' field, enter the URL for your new WordPress site. It's important that the URL you enter matches the URL of your WordPress site exactly. The best way to ensure that you're entering in the URL correctly is to log into your WordPress site, go to the *General Settings* page and copy the 'WordPress Address (URL)'.

WordPress Address (URL)	http://yoursite.com
Site Address (URL)	http://yoursite.com

6. Once you've entered in your URL, click on the 'Save Changes' button to save it. You should see a message informing you that the license was updated successfully. At this point you'll be able to activate the MemberMouse plugin on your WordPress site.

7. Reactivate the MemberMouse plugin.

8. Take your site out of maintenance mode.

There are additional considerations for changing the URL in WordPress and/or if you have PayPal configured on your site.

4. *Do you offer staging or development licenses?*

Yes. Professional web developers often use staging environments when creating and updating websites. Staging environments allow multiple developers to work together, and project managers to proof changes and finalize a project before rolling it out to a production server. A staging environment is sometimes called a sandbox and is the preferred method of streamlining workflow for most web professionals.

All MemberMouse accounts come with a complimentary staging license. Our staging licenses cannot be used for commercial purposes and are limited to 100 members. There is no ability for recurring billing. Other than that, they have no restrictions. Just let us know what the WordPress Site URL is on your staging site and we'll set up the license for that URL. If you're developing locally, make sure it's not just http://localhost. It should be something that will be unique across all customers like http://localhost/yoursitename.

Steps to request a staging license:

1. Submit a ticket to the MemberMouse customer support team and select 'Staging License Request' from the dropdown menu "What is this about?".

2. In the body of your request please provide:

- the email address associated with your account on membermouse.com
- whether the staging license is for a local development environment or a publicly accessible one
- the URL of the WordPress site you're using as your staging environment

5. *Can you provide a sample of the expiring level email to send to customers?*

Here is a sample of what the email could contain including the appropriate MemberMouse SmartTags. Note that the you have to replace the purchase link in this sample with the one for your own product.

Subject: Action Required: Your Account

Body:
Hi [MM_Member_Data name='firstName'],

Your subscription has recently expired. And since we have recently migrated our site, we also have a new billing provider. You must purchase a new subscription to keep your subscription active.

Once you enter your information with our new, improved billing provider, your account will be automatically renewed next time, conveniently. You'll also be able to more easily manage your subscription.

```
<a href="[MM_Purchase_Link productId='8']">Buy Now</a>
```

If you have any questions, feel free to contact us at
```
<a href="mailto:[MM_Employee_Data name='email']">
[MM_Employee_Data name='email']</a>.
```

Thanks!
```
[MM_Employee_Data name='displayName']
```

6. *Can MemberMouse migrate my site?*

No, but... Our Customer Success Team is available via email at support@membermouse.com, Monday - Friday 9AM - 5PM Pacific Time to answer all of your questions during this process. You can also submit a ticket from our Support Center where you'll have access to an extensive Knowledge Base of articles and videos.

If you are interested in hiring an experienced contractor to migrate your site and configure MemberMouse, we have a listing of recommended qualified contractors with descriptions of their services and contact information in our Support Center. This link will take you directly there.

Welcome aboard, we're happy you're here!