

MIGRATION TO MEMBERMOUSE CHECKLIST

So, you're looking to migrate to MemberMouse. Welcome! While every site's specific needs can be different, it's possible to outline some important steps that will help you as you move forward with your migration.

A Little Housekeeping

- ___ 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. Including expired or archived members
- ___ 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)

Some Prepwork on MemberMouse

- ___ Establish administrative & employee roles
- ___ Create products and set pricing
- ___ Configure Membership Levels
- ___ Set up Bundles (if needed)
- ___ Configure Payment Settings
- ___ Consider how to handle billing transfer (you may want to set up 'legacy' products and membership levels)



- ___ Map out content rules & grant access to pages and posts
- ___ Configure Email integration & setup Push Notifications
- ___ Customize Checkout Page and other Core Pages (if desired)
- ___ Test setup using test members and test payment service

Implementation

- ___ Communicate with your members about any changes that will affect them (reset password, update billing info, etc)
- ___ Export member list from previous membership plugin
- ___ Download and configure the MemberMouse import template
- ___ Import members into MemberMouse using the Import Wizard
- ___ Monitor new subscriptions and billing to make sure all is operating as expected

Congratulations on a job well-done! Now for the fun part. Time to take MemberMouse out on the "open road" and see what it can do for you, your members and your business.

