

Go Live Checklist

FINANCIAL

1 Void any test invoices.

You can void any invoices at **Financial > Invoices > tag any invoices** that you want to void and then click the Void button at the top of the invoice list.

2 Create Invoice Templates.

You will need to create two invoices: one for membership and one for events.

<https://help.memberclicks.com/entries/63299114-Invoicing>

3 Assign Revenue Accounts to Member Types.

These are assigned at **Database > Member Types > Edit Settings > Renewal Payment Settings > Revenue Account**. Revenue accounts are also assigned to all pricing fields in forms, including the Member Type.

FORMS

1 Finish up forms as needed, including assigning revenue accounts to form price fields.

Forms Overview — <https://help.memberclicks.com/entries/65550830-Forms-Overview>

Membership Forms — <https://help.memberclicks.com/entries/64751984-Membership-Forms>

Event Forms — <https://help.memberclicks.com/entries/65551820-Event-Forms>

2 Delete any test Form Submissions.

During the testing process there are some test form submissions generated. We recommend removing those so that you have accurate submission lists when you go live.

You can delete any form submissions at **Forms > Form List > click on the number under the Submissions column > click 'Delete' next to any test submissions**.

3 Add links to forms as menu items or site links.

How to Insert a Site Link instructions: <https://help.memberclicks.com/entries/69116840-Inserting-Site-Links-and-Images-Video->

If you want to add a link as a menu item, you will navigate to **Website > Menu Items > Main Menu > click the plus sign** at the top right of the menu manager to add a new menu item or, to change a current menu item, just click on the title of the menu item, then click 'change type' and select the form you want to use.

DATABASE

1 Set up Attribute Security and Profile Owner Attribute Security.

Profile Owner Attribute Security sets what a user can view and edit in their own profile. Attribute Security is what other groups can view and edit in other member types profiles. It is set in **Database > Attribute > Profile Owner Attribute Security or Attribute security**. Instructions on Attribute Security can be found at <https://help.memberclicks.com/entries/69118070-Attributes-Attribute-Security-Video->

2 Review Renewal Notifications.

Notifications go out leading up to user's expiration dates in their profiles with renewal invoices. You can disable Moolah as a payment option for renewal invoices generated by the system at **Database > Member Types > Edit Settings > Renewal Payment Settings > Payment Processor > Offline Payment Only**.

3 Set any Lapsed/Graced members back to Active.

If you set all members to Active, when the cron runs that night, the Lapsed/Graced members (based on their expiration date) will be moved to Lapsed/Graced and then the notifications will push out correctly.

You will need to submit a request to the Help Team to turn on Membership Automation for your site to have notifications begin to go out. When we do that, the crons will begin to run on your account and members who are entering their renewal period, grace period or lapsed will receive their first notification of renewals at midnight that night. (We recommend sending out an email to your members from the contact center before going live to alert them about the new website.)

GOING LIVE

1 Point domain to MemberClicks site.

Contact MemberClicks to transition your domain information so that *www.ORG'sWEBSITE.com* points to your new MemberClicks site.

2 Send an email announcing MemberClicks site in the Contact Center.

Below is an example email to send in Contact Center. You will want to adjust the wording, based on your process of going live. Instructions on how to send a Contact Center email can be found at <https://help.memberclicks.com/entries/63235704-Contact-Center>

Dear ##[Name | First]##,

*I invite you to the new **(domain)**!*

*This website will help with the work of keeping our membership connected. With social networking support, simple tools for staying in touch, space for sharing documents and photos and resources to support committees, we can use it to help market our association and highlight great work being done. In addition, **(domain)** is going to be the workhorse that will collect member dues and support event registration and payment.*

*So pardon our dust, we're still under construction. But we invite you to come see what we've started. To login, you will first need to set up your password. **Click here** (link to Forgot Password site link) to update your Password. Once updated, you can **login here** (link to Login Page), using your Username - ##[Username]## - and new Password. While you are logged in, please complete your profile (it is searchable to help people find you)! You can even renew your dues and register for our next event.*

We're excited! We hope you will be, too!

Sincerely,