

# MEMBERSHIP SITE SETUP CHECKLIST

# Welcome to your AccessAlly membership site set up checklist!

This checklist can be viewed online at:  
[kb.ambitionally.com/tutorials/the-membership-site-checklist](https://kb.ambitionally.com/tutorials/the-membership-site-checklist)

## Please read before you get started:

A membership site is a **complex ecosystem**, filled with unlimited opportunities for your business.

This checklist is meant to be an aid to walk you through **the basic, initial setup of your first online courses/membership area**. It is NOT an exhaustive list of what's possible with AccessAlly

To become more familiar with "what's possible", take time to explore our tutorials at:  
[kb.ambitionally.com/topics/accessally](https://kb.ambitionally.com/topics/accessally)

The checklist items are listed in chronological order. Please make sure that you follow the checklist accordingly – jumping around to later steps often results in an error if you are unfamiliar with how AccessAlly, your WordPress theme, and your CRM system work together.

As always, if you get stuck, we're only a quick email away!

Warmly,

The AccessAlly Team  
email: [your@ambitionally.com](mailto:your@ambitionally.com)

**STAGE 1:  
WEBSITE PREPARATION**

Confirm that your membership plugin is compatible with your CRM
Set up your website's hosting provider (migrate to a new host if necessary)
Choose a subdomain for your membership area
Create a new WordPress install for the membership area on the subdomain
Add an SSL certificate to your membership site
Choose your theme and install it on the membership site WordPress install

**NOTES**

**STAGE 2:  
DESIGN YOUR COURSE**

	Create an outline for your online course
	Prepare your course material (written content, video scripts, etc.)
	Design your course look and feel (Page design, layout, etc.)
	Choose whether your course will use a Standalone or Stage-Release Model
	Design your course icons

**NOTES**

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**STAGE 3:  
SET UP YOUR MEMBERSHIP PLUGIN**

	Set up a custom field in your CRM to store your Password (optional)
	Install AccessAlly and ProgressAlly plugins on your subdomain
	Activate the plugins by entering your license key information
	Set your admin user to "all access"
	Use the AccessAlly Onboarding Wizard to set up: <ul style="list-style-type: none"><li>- CRM Integration</li><li>- Payment Options</li><li>- Common Page Creation</li><li>- Color Scheme / Design Setup</li></ul>

**NOTES**

**STAGE 4:  
CUSTOMIZE COMMON PAGES**

	Login Page
	Dashboard
	My Account
	Payments
	Credit Card
	FAQ
	Contact Page

**NOTES**

**STAGE 5:  
THE COURSE CREATION WIZARD**

	Choose type of course (Standalone vs Stage Release)
	Choose title of course
	Design your course icons (enabled & disabled versions)
	Have your sales page URL ready (if applicable)
	Number of pages in your course (AccessAlly creates these in draft form)
	Permission & revoke tag names (AccessAlly will auto-create your tags)

**NOTES**

**STAGE 6:  
DESIGN PAGES & ADD COURSE CONTENT**

	Upload your course videos to Vimeo, YouTube, or Wistia
	Design your course pages
	Add content to your course pages (then publish each one)
	Configure progress tracking for your pages (if using AccessAlly Pro)

**NOTES**

**STAGE 7:  
CREATE OPT INS AND ORDER FORMS**

	<b>FREE COURSE:</b> <ul style="list-style-type: none"><li>- Create opt in</li></ul>
	<b>PAID COURSE:</b> <ul style="list-style-type: none"><li>- Create a Product</li><li>- Create an order form</li><li>- Add order form to a page</li></ul>
	<b>PAID MEMBERSHIP SUBSCRIPTION:</b> <ul style="list-style-type: none"><li>- Create a product</li><li>- Create an order form</li><li>- Add order form to a page</li></ul>

**NOTES**

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**STAGE 8:  
CREATE CRM AUTOMATIONS**

	Set up a separate release automation for each course
	Set up a refund/revoke access automation for each course (if applicable)
	Set up monthly membership automation (if applicable)
	Set up monthly membership failed payment automation (if applicable)

**NOTES**

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**STAGE 9:  
CREATE A TEST USER**

Create a test user and test each course/automation duo separately

**NOTES**

**STAGE 10:  
ADD MORE COURSES  
(OPTIONAL)**

Repeat Stages 5 - 9 for each course you wish to create.

**NOTES**

**STAGE 11:  
INTERACTIVE DASHBOARD**

Add all course icons to your dashboard page with the AccessAlly shortcode adder

**NOTES**