New Website Training

BAC Membership Support

BEECH AERO CLUB

Overview

Training Content

- Software Overview
- WordPress Concepts
- Other Key Packages and Functions
- Membership Topics
- Membership Payment Flows

Scope/Intent/Notes

Introduction/Overview

- These slides are not meant to be comprehensive.
- They provide a basic introduction to concepts.
- A series of videos are being done to cover common tasks.
  - These slides are not intended to replace or be used without the videos.
  - The videos assume basic understanding of the concepts in these sides.
  - I do a have a video walkthrough of these slides to help.
- Theses slides and the initial videos will only get into the "key software".
  - Supporting software will be covered at a later date.
- WordPress concepts
  - We go a little bit into WordPress concepts as it helps in understanding everything else
- Key points or danger spots will be **bold** or **bold** underline
- *FYI only and/or disabled features are noted in italics*

Software Overview

Software Overview

Key Software Pieces

- WordPress
  - Core site software
- MemberPress
  - Membership Software
- BuddyPress
  - Social Features
  - Packaged as part of BuddyBoss
  - But really it's own thing...
- Simple:Press
  - Forums
- Beaver Builder
  - Page Editor/Builder

Supporting Software Pieces

- Generally Single Purpose
- BuddyBoss
  - Core Theme/Layout
- Tribe Events
  - Event Calendar
- WP Adverts
  - Classifieds
- WP Photo Album Plus
  - Photo Albums
- SP Client Document Manager
  - Downloads

WordPress Concepts

WordPress - Concepts

- Core software that runs the site
  - All members are WordPress users
    - Non-privileged users have no real visibility or need to be aware it is WordPress
    - Username, Email address and Password are managed by "stock" Wordpress Admin
  - All the machinery that runs the site is provided by WordPress
    - Everything is core WordPress or a WordPress plugin
    - There is no other software used or directly integrated to deliver the site
      - All this of course sits on top of standard web and database server
- WordPress stuff often talks about "Front End" and "Back End"
  - Front End means the things visible and "doable" without using the WordPress control panel
    - A key design goal was 100.0% of normal user interaction is via Front End (achieved)
    - Non-admins do not see the "WP Admin Bar" or have access to any part of the admin area
  - Backend means the WordPress admin panel
    - All wp-admin pages are like https://www.beechaeroclub.org/wp-admin/XXXX
      - That link can be bookmarked safely: https://www.beechaeroclub.org/wp-admin/
    - Admins will see the WP Admin Bar for quick access

WordPress - Role Concepts

WordPress primarily uses "Roles" for permissions

- ○ Under the hood roles have a set of capabilities
  - ■ Most software tests for a capability - but this is an FYI only for your needs
- ○ We have the roles defined in 3 groups
  - ■ Stock, Add-Ons & Custom
- ○ All WordPress Users have a primary role and 0 or more additional roles
  - ■ Even non-logged in users have to have a Role (again, like vBulletin)
  - ■ Much like the vBulletin Primary and Secondary groups
- ○ For software that only understands "stock" WordPress stuff we use "role" as a proxy for member/not-member tests
  - ■ We use "user has role Contributor" as a test for being a member

WordPress - Roles Used

Stock Roles Used

- **Subscriber - Read Only effectively**
  - All guests and expired members are Subscribers
- **Contributor - R/O but w/comments**
  - Mostly read only but can comment on Posts
  - All current, paid members are "Contributors"
- **Author**
  - Can create posts
  - w/use f/blessed content contributors
- **Editor**
  - Author plus can edit/delete others posts
  - w/use f/blessed content editors
- **Administrator**
  - "God" Admin (me for now)

Custom/Extra Roles

- **Forum Roles**
  - *Understood by BuddyPress and (indirectly) forums*
  - Spectator
    - Read-only for guests
  - Participant
    - Default read all/post/edit own
  - Moderator
    - Edit/Delete/Moderate/Ban others posts
- **Limited Admin Roles**
  - Super Editor
    - Extra access to theme and visual settings
      - For Rick & future web designers
  - Member Admin
    - Access to user and membership areas
  - Both of these roles also
    - have all Editor abilities
    - are also made Forum Moderators

WordPress - Post Concepts & Content

In WordPress <u>most</u> things are some kind of "post"

- Standard post types:
  - **Posts** are (normally) the most used post type
    - Used for editorial content and (by default) can be commented on
    - Screwing up a post will generally just screw up that post
    - All the former (and most future) "Articles" will be **posts**
  - **Pages** are used for custom content (including "active" content)
    - Pages can be highly customized and include active programming
      - Some pages are still really just content but with more formatting ability
        - Most of the static content linked from the "top" menu is a **page**
      - But some pages can screw up large swaths of the website
        - Example: The entire Forum area in all views is rendered on a single page

WordPress - Custom and Non-Post Data

- Custom post types are often used for other content
  - Sometimes they still act (and can be partially edited) like post:
    - Events & Classifieds are custom post types that still act a lot like a standard post
  - Sometimes they are really only used under the hood
    - Much of MemberPress (rules, memberships, groups and more) are custom post types
      - Mostly invisible and/or can only be edited through custom pages
- More plugins are using custom database tables
  - "Everything is a post" is convenient from a programming view
    - But can be horrible from a database performance perspective
- Non-Post data (using custom database tables)
  - Forums
  - Photo Albums
  - File Library (aka Downloads)
- *Some custom post types and all non-post data is invisible to "stock" WordPress search*

WordPress - Media Library

WordPress has a common "Media Library" for file assets (images/attachments)

- Used for all images and attachments displayed by anything that is any type of post
- Sometimes used under the hood from Front End
  - Classifieds and Events
- Is used explicitly for all pages and posts
  - Ergo: Author and higher roles have media library access on "back end"
- Media library is global
  - So deleting something from the media library will break all references to that something
    - Or you can get 25 copies of the same thing on 25 posts because it gets reuploaded
  - We are using some conventions and a plugin to help manage this - but it often becomes a garbage can
    - No easy way to find if an item is used except via database search - and that is not 100%
  - This is also part of why we do not provide "Author" access to membership by default
- Things that are not posts do not use the media library at all
  - Forum post attachments
  - Download/File library
  - Photo Gallery

Other Key Software

Key Software - MemberPress

- Membership software
  - Handles payments, memberships and expiration
  - Also manages access (directly or indirectly) to Paid/Open areas of website via "Rules"
    - Except forums...
  - **Everything** that allows membership access to the website flows from MemberPress
    - Do not manually fix anything else until you verify MemberPress status is correct
    - 99% of the time fixing MemberPress will fix that
      - In fact so far I have found 0 other problems independently related to Membership
  - In our setup MemberPress also overrides **all** there registration/signup pages
    - This allows seamless single page + payment signup flow
  - MemberPress can set WordPress roles and BuddyPress groups based on membership
    - More on this in a bit - but this is how all the member site access is implemented
      - Admin access is separate and done manually per-user
  - *MemberPress also supports extended custom profile fields - not used*

Key Software - BuddyPress

- BuddyPress provides "social" features to WordPress
  - In our site BuddyPress is "built-in" to BuddyBoss theme but effectively the same
- Features of BuddyPress
  - Private Messages
  - Groups - Currently only using two fixed groups
    - BAC Members (current members)
    - BAC Former Members (expired members)
    - MemberPress manages this automatically for us based on membership status
    - Some things understand BuddyPress groups
      - So we use "BAC Members" for this
    - *Could enable custom groups but disabled for now*
  - Extended User Profiles
    - All fields except username and email are BuddyPress extended profile fields (xprofile)
  - Extended activity feed (our "What's New" page is really this feed)
  - *Friends - Disabled*

Simple:Press - Forums

- Our Forum Software is Simple:Press
  - All forum functionality is rendered on a single page (**forum**)
  - Simple:Press implements it's own permissions
    - So it is not protected by a MemberPress rule
    - Lets us provide selective read access for guests and post access for Former Members
      - Specific forums only
        - Read only Fly-Ins & Mail Lists forums
        - Plus post access to Website Issues for Former Members
          - That way we keep that forum open to people with renewal issues
      - Same model as the "old" site
  - Data lives outside of WordPress posts
    - Invisible to WordPress admin pages except the Forum pages
    - Invisible to stock WordPress search
    - Does **not** use the WordPress media library

Key Software - Beaver Builder

- Two Parts
  - Both support enhanced editing and layout including "active" components
  - Visual Page Editor
    - Provides enhanced abilities for the content area of pages
    - Most but not all of our pages use Beaver Builder
    - Content from Beaver Builder is invisible to stock editor
      - There is dummy content put into the normal page content strictly for search
  - Beaver Themer
    - Provides enhanced abilities for other building blocks
      - Drop in blocks for use pages
      - Header/Footer
  - In both cases Beaver can use WordPress user role or MemberPress membership
    - To show varying content for different users
      - Join versus Renew buttons
      - Member versus non-member content
        - In the header and a few of the landing pages

Membership Functions

MemberPress - Memberships

- We have three **membership** types
- These are linked into a membership **group**
  - Poor choice of name - totally different than other group types
  - People can only have one membership in a group active at the same time
  - Memberpress views these as a hierarchy with a partial upgrade/downgrade relationship
- BAC Member - Single Pay and Auto Renewal
  - These have to be seperate due to MemberPress not allowing mixing auto-subscribe and single pay on a single membership
  - There's some nuances when members switch from Auto-Pay to Single-Payment
    - Separate slide on this
- BAC Former Member
  - This is set as the "default" that members revert to when they expire
  - Only someone who once was really a paid member will become a Former Member

MemberPress - Site Access

- Membership access flows from MemberPress
  - When a user becomes a paid member (Single Pay or Auto-Renewal member)
    - MemberPress automatically
      - Changes their primary WordPress role from **Subscriber** -> **Contributor**
      - Adds a secondary role of **Participant**
      - Adds them to the BuddyPress **BAC Members** BuddyPress Group
    - SimplePress
      - Puts user into the **BAC Members** forum group b/o WordPress role as **Contributor**
  - When a user expires
    - MemberPress automatically
      - Gives them a lifetime free membership as a **BAC Former Member**
      - Removes them from **BAC Members** BuddyPress Group
      - Adds them to the **BAC Former Members** BuddyPress Group
      - Changes their primary WordPress role from **Contributor** -> **Subscriber**
    - SimplePress
      - Puts user into Guests forum group when b/o WordPress role is **Subscriber**

MemberPress - Site Access Rules

- Other site areas
  - MemberPress outright blocks all access to member-content to non-current members
    - Via Memberpress **rules**
    - Most member content is https://www.beechaeroclub.org/member-content/XXXX
    - Things we want to be public cannot be under /member-content/XXX
    - Forums, Events and Classifieds live on their own at the "top"
    - Some specific rules for Events and Classifieds
      - Public can view/read but only members can get at pages to edit/create/delete
    - For now all post content is member only
      - Will need to tweak this in the future for any articles we want to be public
      - For now the "new" visitor content is in pages
        - the "post" (aka article) version of this content is out of date and superseded
  - Except Forums as previously noted implements its own access
    - Basically provides and enforces group based access per-forum

Membership Payment Flows

MemberPress - Payment Concepts

MemberShip flows from payment information

- Subscription - Top level object - a Membership for a user
  - A subscription is active or not - it does not have a date - each active user in a membership has an active one
  - MemberPress views these as recurring or non-recurring
    - In the non-recurring case they may only last a year and instead have a new one created
      - Depends on payment timing (before or after expiration)
- Transaction - A single instance of a payment
  - Transaction has a price, membership and start and end date
  - In the case of PayPal - MemberPress transaction ID is the PayPal transaction ID
- Subscriptions have one or more transactions
  - Recurring (autopay) get associated with Subscriptions and and ID from PayPal
    - Comes from PayPal
    - Stays consistent year over unless there is a break in renewal (or sometimes from PayPal changes)
- Transactions will create a new subscription:
  - if they don't/can't match an existing subscription
  - Most single pay transactions create a new subscription with a new ID
- Transactions and subscriptions have a workflow in MemberPress even if non-PayPal

MemberPress - Rules for Admins

It All Flows From a Transaction...

- Unlike the old site you must grant membership by creating or extending a transaction
  - In almost all cases creating a new transaction is the correct thing to do unless you really are fixing a transaction
  - **Never** edit a PayPal transaction or refund/cancel/reversal handling will fail (and auto-renewals may fail)
- You cannot just grant membership - you **have** to create a transaction that causes MemberPress to record a membership
- You can't do it any other way - except:
  - You could edit the roles and groups by hand - **but do not do this** - **you will screw all kinds of processing up**
    - The old site had the same problem but it wasn't quite as bad
      - This a big part of why our old payment data was such a mess in some places
    - Expiration in particular will not happen and users won't be able to self-renew
- MemberPress strongly tracks payment information per-transaction, this allows and/or will allow
  - MemberPress to provide basic Income and Refund reporting
  - Strong reconciliation between the Website, PayPal and "the books"
    - Certainly between the Website and PayPal - and even semi-automatically
  - **The transaction history going forward will include all payments even if not PayPal**
- MemberPress has intrinsic understanding of things like payments, cancellations and refunds
  - Subscriptions get created or cancelled - Transactions can be payments or refunds
  - Just like PayPal and accounting a payment followed by a refund is **two** transactions (a payment and a refund)
- Transactions have a default price but that price can be edited
  - Ergo - discounted or free memberships should set the price to match ($0 in most of those cases)

Payment Flow - PayPal - Signup

- MemberPress sends the user to PayPal but does not create a pending transaction yet
  - Ergo a user that goes to PayPal and does not complete a payment has no record
- User completes transaction and can elect to return to website
  - That return includes a Transaction ID
  - PayPal also separately calls the website via the **IPN Gateway**
    - The log of IPN calls is visible in PayPal as well - old site did not support IPN
  - Normally the return status has a **pending** status
- PayPal at that time or return or sometimes later
  - If successful - Sends a payment **complete** status via the IPN Gateway
    - This can "beat" the member returning to the site, MemberPress DTRT
    - MemberPress does it's thing
- If failed - Sends a payment **failed** status
  - Will then show as a failed payment with $0 credit
- If later reversed - sends a payment **reversed** status
  - MemberPress shows two transaction - $50 **payment** and $50 **reversal**

PayPal - Auto-Renewal/Refunds/Specials

- PayPal calls MemberPress via IPN gateway with the payment
  - If MemberPress matches Subscription ID creates a new transaction for 1 year renewal
- If user cancels subscription
  - PayPal calls sends notification via IPN Gateway for cancellation of subscription
    - MemberPress (and most software) ignores this notification
  - If a refund is requested (separate action in PayPal)
    - PayPal sends notification via IPN Gateway of transaction reversal
- If we select refunding the transaction in MemberPress
  - MemberPress calls PayPal with a refund request
  - **This is different - you no longer have to go to PayPal to do the refund**
- **In all cases if there is a refund, failure or cancellation**
  - MemberPress revokes the membership and adjust the transaction and subscription
- If all cases you want to comp a membership (full or partial)
  - You have to create a **new** transaction
  - Set it to $0 so the cost accounting is correct

PayPal - Manual Transaction Flow

- Member selects the Check/Money Order/Other Payment Option
- MemberPress creates a non-recurring **pending** transaction
- When we receive payment
  - If there is a pending payment we simply set the transaction to **complete** and Save
    - It's easy to search for all pending transactions or all transactions for a user to find
  - If the user paid for multiple years adjust amount and dates as well before doing Save
  - MemberPress will do the rest for us
- If we got a blind check (user did not go through website first)
  - Create a new transaction as appropriate
    - Memberpress will default to 1 year from current date
    - Amount and time can be adjusted to match payment
  - Select a **complete** status and Save
  - MemberPress will again do the rest for us
- In both cases
  - We can elect to have MemberPress send a PDF receipt
- In all case the user can get self-service a PDF receipt in their profile

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Manual Transaction Refund/Failure

- Find Corresponding Transaction
  - If PayPal select the transaction that you wish to refund/cancel
  - If manual or double payment select the duplicate you wish to refund/cancel
    - In most cases select the newest transaction
    - In a mixed manual/PayPal case select based on whether you want to trigger a PayPal refund
    - In a double pay PayPal case with a single pay and PayPal auto-renewal
      - refund the single-pay transaction or you may break the auto-renewal
- Adjust Status and save
  - If refunding money select **Refund**
    - Note if a PayPal transaction this will trigger a PayPal refund
    - If not PayPal will have to send refund or manually push money from PayPal
  - If failed payment (returned check, etc) select **Failed**
- If you refunded the transaction that is current transaction for the subscription MemberPress will revoke membership
  - In a duplicate payment case you may need to restore membership
  - You can select the other non-refunded transaction
    - Select **pending** and save
    - Edit again and select **complete** and save (you may need to adjust dates depending on timing)
    - This will re-initialize membership without creating yet another duplicate membership
    - This is the one thing you can safely do to edit a PayPal transaction

Other Adjustments and Notes

- Comped ($0) extension to existing subscription
    - It's okay to edit the current transaction and extend the date (be sure to not change amount)
- Comped extension to expired subscription
    - It's okay to edit the most recent transaction and extend the date (be sure to not change amount)
    - If long expired consider creating a new transaction instead so membership tenure data stays "more" correct
- If creating a new comped or discounted transaction for any term
    - Adjust amount to $0 or other correct amount
    - Edit term appropriately
- If awarding a lifetime subscription for $0 or other amount
    - Create a new transaction
    - Click the "Lifetime" button by expiration
    - Adjust amount to appropriate amount
    - This will clear the expiration and treat it as a lifetime subscription
- Always remember subscriptions have to be saved after editing

Slide Templates

Section Page

1-Column Slide

Column One

- Blah
  - Blah Blah

2-Column Slide

Column One

- Blah
  - Blah Blah

Column One

- Blah
  - Blah Blah