

## EE Podcast #74 Membership Sites With Jon Longnecker & Nate Croft

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**Lea Alcantara:** You are listening to the ExpressionEngine Podcast Episode #74 with special guests, Nate Croft and Jonathan Longnecker, here to talk about building a membership site in EE. I'm your host, Lea Alcantara, and I'm joined by my fab co-host, Emily Lewis. This episode is sponsored by [EE Coder](#), the EE experts who play well with others. Do you sometimes wish you have a trusted partner for your projects? EE Coder brings over 25,000 hours of EE experience to companies with needs like yours. Let's chat, contact [EECoder.com](#).

**Emily Lewis:** The ExpressionEngine Podcast would also like to thank [Pixel & Tonic](#) for being our major sponsor of the year. Hey Lea, how are things with you? [Music ends]

**Lea Alcantara:** Good. I was in the Edmonton Journal recently since I was speaking at a local business event there, so it's been pretty fun and exciting for me.

**Emily Lewis:** Yeah, I saw some of your updates on Facebook. That is some incredible exposure for you. Congratulations!

**Lea Alcantara:** Thanks. It's been unexpected.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** Yeah. It's been kind of a whirlwind but fun too. Speaking of whirlwinds, the EE world has been on one too recently.

**Emily Lewis:** [Agrees] Yeah, there has been a bit of news about EE since our last podcast. First, the final details for the EEI US Conference are now available. The event will be October 15<sup>th</sup> through the 17<sup>th</sup> at the Horseshoe Bay Resort, which is about 40 minutes outside of Austin, Texas.

**Lea Alcantara:** And though it's a couple of days late, the event website is finally live at [eeciconf.com](#), so exciting time!

**Emily Lewis:** [Laughs]

**Lea Alcantara:** We really hope to see you there because... (Drum roll).

**Emily Lewis:** [Laughs]

**Lea Alcantara:** EE Podcast is taking it on the road, and Emily and I will be at the conference recording the show live. Whooo! [Laughs]

**Emily Lewis:** [Laughs] So that makes me nervous.

**Lea Alcantara:** I know. I know. So that's the good news.

**Emily Lewis:** Yeah, and then there was not so good news. Last week there was some discussion on Twitter and in blog posts regarding the issue of outstanding EE bugs, and then I also saw some comments on the EECMS hashtag, I moved to the blog and read Stephen Lewis' post, [EE Bugs are not my Problem or Yours](#), in which he sort of vents his frustrations with the number of outstanding bugs in the EE.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** As well as with the community voluntarily fixing bugs for a commercial product.

**Lea Alcantara:** I think that post definitely resonated with a lot of people in the community, including myself. But I just read [a tweet by Mark Croxton](#), that's the developer of Stash and IfElse that I agree with a thousand percent. He wrote, "While I understand the negativity, I do not share it. EEMCS remains the most capable platform I have used."

**Emily Lewis:** Yeah, that's how I feel. I mean, I do recognize that Stephen and others who agree with him, they have completely points.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** I just don't share the level of frustration that they seem to have. Like Mark said in his tweet, "EE has offered me more than any other solutions I've tried and I love it and so do my clients, but it is just a tool for me and I don't expect it to be perfect."

**Lea Alcantara:** [Agrees]

**Emily Lewis:** What really concerns me though is the sort of the tone and how frustrated people are in the community, and it seems that people are even questioning the future of EE.

**Lea Alcantara:** At the end of the day like everyone in the community, I do want the software to improve as well as EllisLab. We all have a stake in here even the vocal critics. I suggest listeners to read Ryan Masuga's [post in Devot:ee](#) including the comment by Erik Reagan in that post.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** I think the bottom line is that currently everyone in the community agrees that the software and EllisLab could be better...

**Emily Lewis:** Right, right.

**Lea Alcantara:** But we are not ignorant to its faults, but I disagree perhaps over the severity or tone taken by some.

**Emily Lewis:** [Agrees] I'd love to find out our guests' opinion on this discussion before we get into today's topic of membership sites. So without further ado, may I introduce the [Kick Awesome](#) duo of Jonathan Longnecker and Nate Croft. Jon and Nate are partners of [FortySeven Media](#) where they design and build websites using ExpressionEngine amongst a bunch of other services like video production and brand awareness. They guys are hosts of the Kick Awesome Show about design, the web and general nerdery. Welcome guys. Thank you for joining us.

**Jon Longnecker:** Thanks for having us.

**Nate Croft:** Yeah. Thanks.

**Lea Alcantara:** Jonathan and Nate, before we talk about your [Kicktastic](#) membership, can you share any thoughts about the current controversy with EE that Emily and I just mentioned?

**Jon Longnecker:** Nate?

**Nate Croft:** Yeah, Jon, do you want to...

**Jon Longnecker:** Oh, I see. Okay, yeah. I can, go.

**Nate Croft:** All right.

**Jon Longnecker:** Okay, well ... [Laughs]

**Nate Croft:** [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Jon Longnecker:** Yeah, so I'm not a developer.

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**Lea Alcantara:** Sure.

**Jon Longnecker:** I don't know PHP at all, and so I feel like a lot of the sort of frustration is coming from people who are probably more familiar with the guts of ExpressionEngine.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** Because while there are definitely bugs, and there used to be some really, really bad ones even just a couple of months ago, I feel like a lot of the major ones have gotten ironed out. At least for me, I haven't run into anything major recently. But after I read Stephen's post and I kind of go and checked out, there are a lot of bugs and it does seem odd that there are so many of these things like really simple to fix, but just nothing has been done with them, and that combined with like just nothing from Ellis like not hearing anything from them.

**Emily Lewis:** They seem really quiet.

**Lea Alcantara:** Yeah.

**Jon Longnecker:** Yeah, and like Marcus leaving. It just seems like something is going on, but I don't know what, so I'm just speculating. No, I had no idea. [Laughs] But it seems like something is going on. It would be nice to hear from them officially and see what's happening.

**Lea Alcantara:** Nate?

**Nate Croft:** Yeah, I think a lot of people are so much tied up in EE, especially developers because they are in a unique position where a lot of us aren't like the FortySeven Media, and we use EE to build websites. We don't make add-ons with custom development with hacking the core or anything like that. So we don't have that extra layer of income to be worried about or to be frustrated about, and honestly, I don't think I've ever tracked or looked at the bug tracker more than one or twice. If it's not a bug that I have, that I run into that's hindering something my clients want to do or something I want to build, I don't go looking for it. As developers and people that are constantly worried and concerned about bugs in their own software, that's something that's on their mind. They are having to deal with their stuff to clean it up, and I guess seeing like the mother ship not taking care of their problems is really, really frustrating. But like I said, it's like you have a kind of a relationship you have with any kind of company or service. If you want to find something that's off kilter or wrong or problems, it's always there to find if you want to look for it.

**Emily Lewis:** [Agrees]

**Nate Croft:** But for me personally, I don't have any problems with EE. Even though some of those bugs may have been around for a long time, it's not something that hinders my progress or work, and on the whole, I'm happy with it.

**Emily Lewis:** Yeah.

**Lea Alcantara:** Sure.

**Emily Lewis:** I guess maybe what it comes down to is where it does affect you. I think all of us that are speaking right now maybe the issue with the bugs isn't something that's personally affecting us or professionally affecting us, and it sounds like for others, it's a very big deal, and that's where that frustration seems to come from and sort of really negative tone I saw on Twitter.

**Lea Alcantara:** And I think part of it too is that it's kind of ironic almost because before, the problem was that some people complained that EllisLab divulged way too much way too soon and then under-delivered.

**Emily Lewis:** [Agrees]

**Jon Longnecker:** [Laughs]

**Lea Alcantara:** And then now, we don't hear anything. [Laughs] So I guess it's trying to find that balance.

**Nate Croft:** Yeah.

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**Emily Lewis:** Yeah.

**Nate Croft:** I think that's more concerning on a couple of bugs is this really like there is no communication. I mean, obviously, you don't want to just fire back in response to something.

**Lea Alcantara:** Sure.

**Nate Croft:** But it's been a couple of days and a weekend, and I would think that somebody would at least have tried to address something at this point, but they may be working on it as we speak, so who knows?

**Lea Alcantara:** Sure.

**Emily Lewis:** Yeah, maybe by the time this podcast goes live on Thursday, we will have some more news.

**Jon Longnecker:** [Agrees]

**Emily Lewis:** Well, thanks guys for sharing your opinion. I know we didn't ask you to talk about that. We did want to talk to you about membership sites.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** Because you guys recently launched your own membership site, Kicktastic, for video training?

**Jon Longnecker:** Yes, yes, we did.

**Emily Lewis:** So before we talk about your site specifically, I did want to get sort of some thoughts from the group about what is a membership site, like what are the common features that sort of define a membership site? Maybe Nate you want to try that first.

**Nate Croft:** Yeah, yeah. I'll go. Membership site, at least the way it kind of come together in my mind, is where there is content not available or there are some added feature of becoming of a member to the site that you wouldn't have as just casual browsers with a site, where that's content behind a username and password or you can't get in through otherwise whether that's paid or free. It's seems to be like that login and access to something more and you're now having profiles and the ability to edit these things with comments and interact with other members. That's really what it stands out to me in my mind. As far as like the finer points of the technology and that sort of thing, I think it varies wildly.

**00:10:00**

**Emily Lewis:** [Agrees] Now, Lea, have you built a membership site before?

**Lea Alcantara:** Oh yeah, absolutely. I think almost every single ExpressionEngine site I've ever done has some sort of membership capability because a client always wants to be able to change their password or something like that, or there might be just one little area or with some downloads that they only want a certain amount of people to take a look at.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Every like site has some sort of membership capability. I think I've done like a really, really large one for event registration membership site and that was very interesting to deal with.

**Emily Lewis:** Yeah, but it ultimately sounds like that the main thing is that there needs to be some way of giving certain users special access to some sort of feature or functionality.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And basically, EE out of the box gives you that, like that you can create member records and you can hide content behind a login.

**Jon Longnecker:** Oh yeah, absolutely.

**Lea Alcantara:** Yeah.

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**Emily Lewis:** In terms of EE core, especially when you guys were getting ready to start this project for Kicktastic, did you go through it and identified what you could use out of EE core without any sort of add-ons or modifications?

**Nate Croft:** Definitely, we kind of had a review because anytime you're building anything internally that's coming out of your own pocket, it's sort of nice to save cost on any add-ons or any other third-party services. [Laughs]

**Lea Alcantara:** Sure

**Emily Lewis:** Right.

**Nate Croft:** So as much as we know how to do where we can figure out how to deal with it, we are certainly going to do that.

**Emily Lewis:** And was there anything specific that was great with EE core that was just perfect for what you needed to do, for example, a straight login. I'm developing a site right now that has some membership behind it. They needed the situation, for example, though for members to belong to more than one member group which EE right out of the box doesn't offer. So login was good, but then I had to modify it. So when you guys were doing this, what did you do straight from EE?

**Jon Longnecker:** Well, we obviously, we are publishing content. We are publishing videos so that's a huge strength, and so we use that part of Expression Engine quite a bit.

**Emily Lewis:** The file management?

**Jon Longnecker:** Not just file management, but just custom fields, channels.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]

**Jon Longnecker:** And then relationships, we use Playa and stuff like that, which we can talk about more in a minute. But in terms of like the member stuff, we really weren't sure because the biggest thing about what we wanted to do with our membership site was we wanted to have people sign in and pay every month to be a part of it.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** Was that where you have to sign in each month and pay, or was it recurring billing?

**Jon Longnecker:** Yeah, it's recurring billing rate.

**Emily Lewis:** Okay.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** Yeah, so we needed that to happen automatically and we needed an assistant that if they didn't pay, he would remove them from the member group and not just add them to it but remove them, and so we didn't know initially because we had to take payments, so we were looking at different shopping carts. There is CartThrob with billing retail, and what's the other one?

**Emily Lewis:** Magento?

**Jon Longnecker:** No.

**Lea Alcantara:** Oh...

**Jon Longnecker:** The EE add-on.

**Nate Croft:** Exp:resso.

**Lea Alcantara:** Exp:resso.

**Jon Longnecker:** Yeah, yeah, yeah.

**Nate Croft:** Yeah.

**Jon Longnecker:** And so we are looking at those and I don't think we ever considered the Simple Commerce Module because PayPal scares us, [laughs] but we knew that however we took payment, it was going to have to tie into the memberships, and so it we knew there was going to be some sort of add-on that had to integrate with all that and we didn't know if it would just integrate with the actual member module in ExpressionEngine or if it was going to its own thing. We just didn't know initially.

**Emily Lewis:** Well, so how are you able to plan for that?

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** Well, we ran...

**Emily Lewis:** If you didn't really know how it was going to work, how could you plan for that?

**Lea Alcantara:** Yeah.

**Emily Lewis:** Well, we did a lot of research, and what we found out was that mostly the shopping carts, at least at the time, either did not have recurring billing or it was in sort of alpha or beta and it wasn't really ready to go yet, but we did run across an add-on called Membrr and that's what we ended up using. So what Membrr does is it does actually integrate with your member groups, so we were able to use all that native ExpressionEngine functionality and then Membrr takes care of the payments and coupon codes and attaching a plan in Membrr to a member group in ExpressionEngine.

**Emily Lewis:** Wow! I'm taking a look at the Membrr site right now. So does it function sort of like an e-commerce solution, or in terms of how you are setting it up and I don't know if you've used CartThrob, but it has its own link area where you set everything up and it got its own payment gateway.

**Jon Longnecker:** Yeah, so the members actually, it's two pieces. The main piece is called OpenGateway. It's like a standalone software. It's got its own database. It installs in the directory on your server and it handles all the payment gateways, all of your member accounts, and no, I'm sorry, not member accounts, but basically you set up all your plans, how much you're going to charge for them, how often you're going to charge for the coupons, but you've got like emails that gets sent out like email receipts and autoresponders and stuff like that. That's all set up in OpenGateway, and there is a module, an ExpressionEngine module, that basically sinks that data into ExpressionEngine into the right places.

**Nate Croft:** It's a bit fiddly, but it's working for us.

**Jon Longnecker:** Yes.

**Lea Alcantara:** So if it's kind of like two parts, is everything administered in the ExpressionEngine control panel?

**Jon Longnecker:** No.

**Lea Alcantara:** Interesting.

**Nate Croft:** Yeah. [Laughs]

**Lea Alcantara:** [Laughs]

**Jon Longnecker:** You see, you can go into the module in ExpressionEngine. You can see a lot of things where you can kind of do different things in different places. Generally, I think we just ended up going to the gateway most of the time.

**Emily Lewis:** If this was something you were building for a client, how do you think you would have them administer things the same way you're doing mostly in the gateway area?

**Jon Longnecker:** Well, it would depend on what the client wanted to see, like if the client would be messing with coupon codes and plan types and email autoresponders and the like, I think that would be things that we would set up for them.

However, I mean, you can go and see all your customers and see what plan they signed up for in ExpressionEngine, but a lot of the stuff that we go in and check is probably more in the development side, I guess.

**Emily Lewis:** [Agrees]

**Jon Longnecker:** So that's probably why we end up going there, although OpenGateway does have a really nice sort of overview screen. It tells you like the latest activity so if somebody signed up, it will say, "This person created an account. They started a recurring billing cycle and they paid you this much." Whereas I don't think that the EE module lays things out quite like that. I think it's a little bit different. I mean, you can go in both places, but in terms of really administering some of the stuff, you have to do it through the gateway.

**Emily Lewis:** [Agrees] Other than Membrr, what other sort of add-ons were you using?

**Jon Longnecker:** So like I said, we use Playa, and in our case, we decided sort of early on that we were going to have series of videos so a series is going to have several main videos in it and then sort of smaller or reduced tips videos that are just a couple of minutes long. So when we created the series, basically we are just relating a main video to it. So if you go to that series page, it's got the three main videos, and then for each video, we relate the tips that each of the main video. So it's sort of like three levels of relationships, I guess.

**Nate Croft:** It's relationship inception.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Jon Longnecker:** [Laughs]

**Nate Croft:** [Laughs] And we know that we could do some of that stuff with the reverse related entries and things like that, but we just like Playa because really that's nice to use.

**Emily Lewis:** That's easy.

**Jon Longnecker:** With Playa, we use Matrix in a few spots where we probably wouldn't have to use it, but we just really like using it. It just makes it easy. I think we use it for the pieces on the side like the resources and links and stuff like that for each video. We ended up buying the user module basically just to let people update like their first and last names, I think.

**Emily Lewis:** Were you talking about Solspaces?

**Nate Croft:** Yes.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Yeah.

**Jon Longnecker:** Because Membrr will let you update certain profile information, but not all of it.

**Lea Alcantara:** Oh, interesting.

**Jon Longnecker:** There's one thing that drove me kind of nuts is that when you sign up for billing information, you have to put in your first and last name.

**Lea Alcantara:** Sure.

**Jon Longnecker:** But it doesn't put that anywhere that you can get to it later.

**Lea Alcantara:** Oh.

**Nate Croft:** Details you know, details. [Laughs]

**Lea Alcantara:** Okay. So I'm just trying to wrap my mind around since you just mentioned where you can sign up something in Membrr and you got your first name and last name, what is stored in EE? Like is there...

**Jon Longnecker:** Your username and password.

**Lea Alcantara:** Okay, so basically, Membrr really is just kind of an adjunct.

**Nate Croft:** [Agrees]

**Lea Alcantara:** And the logins are what's driving in EE.

**Jon Longnecker:** Yeah, it actually creates a new member in whatever member group you designated. We've got a monthly plan and a yearly plans, so if somebody signs up for a monthly plan, that puts them into the monthly member group.

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**Lea Alcantara:** Do you have any of the sign-ons from members synced to user so they don't have to re-add their like first name or last name or other address situations?

**Jon Longnecker:** What kind of drove us crazy is that there is not currently an easy way to get that first name and last name out of OpenGateway's database.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** So what we did is we created custom fields in the member area for outstanding. It's not required like they still have the username and their screen name, but the first and last name don't, so it will give them like an account page they can update or they can add a picture and put in their first name and last name.

**Lea Alcantara:** So did you consider any other solution besides User? For example, why did you decide to create member custom field as opposed to just creating a new member channel entries and using that to administer and using something like Zoo Visitor or whatever?

**Jon Longnecker:** I've seen Zoo Visitor and I'm really interested in using it, but I just haven't used it yet, and I think because we had all these other stuff going on that was interacting with the Membrr module, we just kind of afraid with conflicts with the way that it sort of takes user data and puts it into a channel.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** So I think we looked at that, but we used the User a couple of times.

**Lea Alcantara:** Yeah.

**Nate Croft:** It was really kind of a situation where things were familiar at that point.

**Lea Alcantara:** Yeah.

**Nate Croft:** And we've given ourselves internally like a launch date where we were speaking at a particular conference and we wanted to launch there, and it was just the running of the bulls to get the deadline actually and meet that. So some of our choices weren't entirely based out of logic and sound reasoning.

**Lea Alcantara:** [Laughs]

**Nate Croft:** [Laughs] Just to be perfectly honest.

**Lea Alcantara:** Sure.

**Nate Croft:** But it's what we knew and we knew we could get it done in time with the way that we did it, and it's one of those things where we are now in sort of the mentality of just iterative updates and just kind of tweaking out a few of the rough edges and then kind of sweeping some of those down for people.



**Lea Alcantara:** Well, I think that still uses sound logic and reasoning, right?

**Nate Croft:** [Laughs]

**Lea Alcantara:** Like I have to say, it's like choosing a solution you know very, very well especially since it's user friendly for you.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** You understand it, and frankly, SolSpace's User add-on has been around the longest so it's guaranteed to work.

**Emily Lewis:** Hey, Lea, since you've mentioned Zoo Visitor, have you used that?

**Lea Alcantara:** Briefly, but it wasn't the right solution for my client because I tried it when they first launched, and when they first launched, I tried to retrofit it in my current membership site, and back then, they didn't have an easy way to import current members into Zoo Visitor which was a huge disadvantage.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** They do currently have an import tool now because before they just wanted new membership sites to use it, but there is a lot of EE sites out there that uses members, and yeah, so in the end I just used User.

**Emily Lewis:** Have you done the situation though where you managed members as channel entries?

**Lea Alcantara:** No.

**Emily Lewis:** No?

**Lea Alcantara:** No. Okay, for my experience, I've just created like custom member fields as well.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** For similar reasons Jon and Nate brought up because, first of all, it was familiar. We knew it's already in the membership section and it's all set and done. Another thing that I wanted to mention for the membership site that I made, I did use CartThrob for it so they could sign up for the events and everything, and they do have an option where once you sign up, it does sync all your information into member fields, but you do have to set it up and it's not perfect and they don't allow you to sync every single member field on there [laughs] either. So I find it a little curious that a couple of big membership sites or e-commerce sections have a difficult way to sync member fields to sign-up process.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Otherwise, you kind of force people to redo things or you really kind of have to hack some things to add data.

**Emily Lewis:** Right, and I think for me, I basically agree with everyone so far. As I was looking at a couple of add-ons that do give me the opportunity to manage my member records as channel entries which from what I was reading from the add-on, the documentation, it might have worked to accommodate what I needed to do, but ultimately I really didn't know what was going to happen with it so I'd rather use User and just the native EE. It just made sense to get the project done. [Laughs]

**Nate Croft:** [Laughs]

**Lea Alcantara:** Well, especially because at least for me with CartThrob, the member information was directly tied to the payment gateway, so it actually looked into what you placed in there because it synced up to what you signed up with. So what they placed in the address there needed to be correct in order for the payment to be accepted.

**Emily Lewis:** [Agrees]

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**Jon Longnecker:** Yeah.

**Lea Alcantara:** So if I had tried to force channel entries to do the same thing versus like the member fields, I don't think it would have happened properly.

**Emily Lewis:** Right.

**Lea Alcantara:** Or I would have had to like really hack it, or basically redo it and then just sync it back to the member fields, I guess.

**Jon Longnecker:** Yeah, it sounds like there is a real...

**Emily Lewis:** Need for something.

**Jon Longnecker:** There is a real need for some kind of membership solution that takes you from start to finish handling payment gateways and everything and lets you have the data inside of EE because that's one of the things that is sort of pressuring us. We can get everything we need in and out in various places, but there is not a single place to manage everything, especially if you're going to turn something over to the client. I think that's kind of missing.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees] So as you guys were building out the site or now that it's launched, have you had any surprises or gotchas along the way that are pretty much specific to dealing with the membership site or maybe working with EE and payments?

**Nate Croft:** [Laughs] Yeah, we've had a few.

**Jon Longnecker:** Yeah.

**Lea Alcantara:** [Laughs]

**Jon Longnecker:** The biggest one that we've run into is that Membrr has several different forms that it uses and one is like the update profile or update billing information form, and then one is the signup form basically, and they are two different forms. So the issue we ran into is that we had somebody who would sign up and they were paying and their credit card expired.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** And so when it expired, OpenGateway tried to bill it, it couldn't so it sent them an email and said, "Hey, this didn't work out." And when he goes and tries to update his billing information, it doesn't work. It's giving some weird error code, so I get on the support forums and it turns out that if somebody tries to pay with the credit card that's expired or it's just was not the right information and they are already signed up, it actually kicks them off as a member.

**Lea Alcantara:** Oh.

**Emily Lewis:** Oh.

**Jon Longnecker:** And then the reason that they can't update their information is because they are not a member anymore. Their subscriber ID is gone, which is completely ridiculous. That was like...

**Emily Lewis:** So it deletes the record, or it just change the member group?

**Jon Longnecker:** It removes their subscription ID. They are still a member for as long as they are paid, but it removes the subscription ID. So I'm like, "Okay, well, this is going to happen often because people's credit cards are going to expire." And he's like, "Oh yeah, so what you've got to do is if they get kicked out, they actually have to sign up again."

**Lea Alcantara:** Oh God. [Laughs]

**Nate Croft:** Yeah, yeah.

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**Jon Longnecker:** And I'm like, "Okay, but they had coupon codes. They are not going to remember the coupon codes." And so there's no way to transfer the coupon code and it's really confusing. So right now we have two update billing information places on the site. There is one that you can get to that's really visible if you're already a member, and then there is another one that's kind of smaller if you're having trouble updating it which actually signs you up for a new subscription, and it's got a coupon field on it and they are supposed to magically somehow remember their coupon. If they will know how, they will probably have to email us, but that's all we've got at the moment. So that was one of the bigger gotchas we kind of found out after we had it launched for like a month or so.

**Nate Croft:** Yeah, but that's still getting you.

**Jon Longnecker:** Yeah.

**Lea Alcantara:** Wow.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** Yeah, that must be annoying. [Laughs]

**Nate Croft:** Yeah, yeah.

**Jon Longnecker:** Yeah, I don't understand why it works that way. There should be one single update form.

**Lea Alcantara:** Sure.

**Emily Lewis:** [Agrees]

**Jon Longnecker:** I think so anyway. We had a long discussion about it [laughs] in the thread and they agreed. But I think Membrrr actually got bought by somebody else very recently too.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** So I'd say it was like around the same time so I'm sure there were still familiarizing themselves with the software itself and like how everything was put together. So hopefully, it will get worked out, but for now it's kind of hacked together, but it works.

**Emily Lewis:** Anything else in terms of while you guys were developing, something maybe you started down a road and then you realized that that was the wrong direction and you had to sort of change tacks.

**Nate Croft:** As far as ExpressionEngine stuff, I'm not sure. We certainly had some workflow and stuff and things like that.

**00:30:00**

**Jon Longnecker:** We changed a lot of the UI type thing. Well, our whole idea was very fluid, with just the whole idea for the project themselves, so we changed a lot of it, were these tips are going to be related here, or are they going to live here by themselves, or just all sorts of stuff that we kind of changed, but they weren't really problems because ExpressionEngine can handle all of them.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** It was just how we were putting it together on the back end.

**Emily Lewis:** So do you think that was more of a project management or a planning thing as opposed to what a system could do?

**Jon Longnecker:** Yeah, absolutely. It wasn't a problem with the system, it was just that we just kept having ideas while we were developing it.

**Nate Croft:** [Laughs]

**Lea Alcantara:** Sure, sure. So I'm curious because when I was developing the membership site that I developed, after launch, that was the only time when we realized how we could improve the signup process because you're just kind of making the assumption, "Okay, go to this page, this page and they'll figure all these kinds of things out." And after it launched, you get a couple of support emails saying, "How do I do this, or whatever?"

**Nate Croft:** [Laughs]

**Lea Alcantara:** Based on those questions, what were some of the signup issues perhaps that you changed maybe post-launch?

**Jon Longnecker:** We changed a lot of things with a couple of people.

**Nate Croft:** Yeah.

**Jon Longnecker:** Because we actually had this period where we send it out to, I don't know, was it like 20 or 30 people, just good friends that like we trusted and like we knew would give us good feedback. Actually, most of them didn't give us any feedback, but several of them gave us really good feedback.

**Nate Croft:** [Laughs]

**Lea Alcantara:** [Laughs]

**Jon Longnecker:** And I think it was Matt Weinberg, wasn't it, that wrote...

**Nate Croft:** Yeah, man.

**Jon Longnecker:** Yeah, he wrote us a whole bunch of stuff.

**Lea Alcantara:** [Laughs]

**Jon Longnecker:** It was just really, really good like it was good information and we were like, "Oh yeah, that's good. That would make sense." And so his biggest thing was the signup was fine as far as filling in the fields, but it was like what happens after, like what I'm supposed to do next, that kind of thing.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** And so after hearing that, we created, like basically the thank you signup page has a bunch of descriptions and information about like what each piece is, how they are related to each other with big links to, "You can go and start watching this video or start watching the tip, or go and update your profile information and put your photo there." Basically just an explanation of how everything work together in case it wasn't clear, you know?

**Lea Alcantara:** [Agrees]

**Emily Lewis:** That guiding the user bit.

**Jon Longnecker:** Yeah.

**Nate Croft:** Yeah, it's going to be like once you sign up, it's like the launch pad for getting you into the content and taken care of anything that you wanted to clear up as far as like I want my picture, so when I'm making comments, they can see my face, that sort of thing.

**Emily Lewis:** [Agrees] Now, how are you guys handling customer service now that the site has launched?

**Nate Croft:** Right now, we are using one of those fantastic high tech things called email.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Nate Croft:** Yeah. We are state of the art. It's no longer paper and carrier pigeons.

**Lea Alcantara:** [Laughs]

**Nate Croft:** Now, there is a lot of folks we know that are using Get Satisfaction and things like that, but for where we are at right now, it's not always technical help because it's not an app. It's not a software that's doing something else. It's a training and teaching platform so it's pretty straightforward. You've got to pay if you watch a video or you ask questions. Most of our support has been dealing like where we talked about earlier where a credit card expired and they are like, "Hey, what happened on this thing?" And we are fine with that, it's just best to talk directly with people.

**Emily Lewis:** [Agrees]

**Nate Croft:** Because email is with us everywhere and we don't have to get notifications and then log in to something. So if we are out and have our phones with us or something, we can actually do support really easily just straight over email.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** It makes sense. I mean, whatever works best for the solution. Lea, have you used something like Get Satisfaction on a membership site or any other kind of site?

**Lea Alcantara:** Usually, we just used email, but we started testing that new add on by Krea, I forgot what it's called, but it's by Krea. [Laughs]

**Nate Croft:** [Laughs]

**Lea Alcantara:** And it's basically a ticket add-on for ExpressionEngine, and so far it's actually pretty fantastic because I actually cobbled a support tracker via EE channels and SafeCracker before and then I used MX Notify Control to kind of cobble together one.

**Emily Lewis:** [Agrees]

**Nate Croft:** [Agrees]

**Lea Alcantara:** And that works. Actually, it works, but it doesn't work all the time and it's not perfect.

**Nate Croft:** [Laughs]

**Lea Alcantara:** And then yeah, so I mean, once your needs start to expand in terms of support stuff where you want one place to see everything and then you want to assign a support question to someone and then you want also attach a file and then give it certain severities and things like that, I mean, it can actually be cobbled together with ExpressionEngine channels and entries. Like I said, I kind of did, but it wasn't perfect. It wasn't made for that and it didn't have a like a great user interface, and Krea is really great because once you hook it up to your own email, you can decide to choose using the module interface so you can add tickets there and assign things there, et cetera, or if you assign like a support email like support@lealea.net or whatever, you can actually just use your email and email directly to support@whatever.whatever, and it posts...

**Nate Croft:** Oh, that's nice.

**Lea Alcantara:** Exactly, it's awesome. It posts even an attached file to that support module. So I know, for example, that DevDemon uses it because the last time I tried support question from them, it was exactly the same like text interface.

**Nate Croft:** [Laughs]

**Lea Alcantara:** And I'm like, "Ha-ha, they are testing it out too."

**Emily Lewis:** [Laughs]

**Jon Longnecker:** [Laughs]

**Nate Croft:** [Laughs]

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**Lea Alcantara:** [Laughs] But so far I actually really like it. I think if someone wants to have a simple support interface and you can just tell people to email support@whatever, it actually does get posted and there are some notification controls there too so it can notify the person who sent that with support. It can notify the person it possibly is assigned to. I do believe though that it doesn't automatically assign it to anyone if you just use the email. It just posts it to EE, but then you can assign the notification to notify everyone in the super admins to get the email as well. So to me, I think if I was going to create a support tracker again for ExpressionEngine, I would just use this add-on.

**Emily Lewis:** We will definitely get the name of that in a link in our show notes.

**Nate Croft:** And I'll probably go and look at it when it's up.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** No, no.

**Emily Lewis:** It's...

**Lea Alcantara:** But I really recommend it.

**Emily Lewis:** So do you guys do any email distribution to your members?

**Jon Longnecker:** Yeah, we sure do.

**Nate Croft:** Lots of email. [Laughs]

**Jon Longnecker:** Yeah, when we first created it, we sent an email out to everybody and we said, "Okay, so when we put up new video, which is going to be fairly often with new content for you to check out, how do you want us to tell you? Is it Twitter, Facebook, carrier pigeon or whatever?"

**Lea Alcantara:** [Laughs]

**Jon Longnecker:** And everybody was like, "Email, email is good." So which is what we kind of thought, but we just want to make sure. We used Campaign Monitor.

**Lea Alcantara:** Cool.

**Jon Longnecker:** And actually, Campaigner. Stephen Lewis makes Campaigner and it syncs up between the two which actually it didn't initially because Membr uses some weird hook to create members, but he was nice enough to patch it for me, so it works now.

**Nate Croft:** Yehey!

**Lea Alcantara:** Very cool.

**Nate Croft:** [Laughs]

**Lea Alcantara:** So I'm curious about the mailing list stuff, because [music starts] usually with member sites, you need to have a way to email your massive database of people [music stops] to let them know about features. I mean, generally speaking, it's great if you just have one list and you just send to everyone. Do you subgroup any of these lists? Like, for example, let's say you wanted to send an offer to the monthly subscribers so that they have an impetus to sign up for a year instead of just continue month to month, clearly you don't want to send that email to the ones who have already signed up for a year, how would you be able to do that?

**Nate Croft:** Yeah, we haven't actually split them out in subgroups yet just because right now we are not having any sort of those offers yet.

**Jon Longnecker:** Yeah, and that would actually be kind of complicated because if they had paid for a couple of months, then we would have to pro rate it somehow or something like that.

**Lea Alcantara:** Sure.

**Nate Croft:** Or just extend it for the whole year.

**Jon Longnecker:** Yeah, we really would have to start new. So yeah, I mean, right now, actually if people pay monthly, they are paying us a little bit more.

**Lea Alcantara:** Sure.

**Jon Longnecker:** You save a little bit if you pay yearly. So yeah, right now, they are just all in one member group or one, I guess, subscriber list is the right term.

**Nate Croft:** Now, as we go through and maybe have some different segments of the customers where we have different products, or if we, for some reason, add like a quarterly option or something like that, at that point we may want to start segmenting.

**Lea Alcantara:** Sure.

**Nate Croft:** But right now, I don't know that there is anything we can do. We haven't split them up into that kind of funnel yet.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]

**Jon Longnecker:** Yeah, we do have another list of people that we are initially interested in Kicktastic.

**Lea Alcantara:** [Agrees]

**Jon Longnecker:** And that we started catching emails probably a year ago when we were still building that.

**Nate Croft:** And that's really an interesting thing. It has nothing to do with EE or anything like that, but as far as the email things, I just wanted to stop and just say something about that really quickly. That was a really interesting idea that a friend of ours, Allan Branch with Less Everything, had is if you have an idea for something and we created the kind of the splash page, it's basically kind of teaser things and say, "Hey, if you want to more about this, just sign up." We hadn't made it, we hadn't done anything.

**00:40:03**

**Lea Alcantara:** [Laughs]

**Nate Croft:** It was just more of, "Hey, if you want to know about this, we'll let you know when it's ready." And basically, we set a threshold, if we got X amount of emails, we would actually make this thing. It's just sort of like a nice qualifier for testing ideas.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** It's pretty cool.

**Nate Croft:** If it reaches the threshold, we are like, "Great, we are working out on this thing." If it doesn't reach it, we would say, "Hey, we didn't have enough interest. Thanks for checking it out for us and keep us in mind in the future." Or something like that. But in our case, actually, there were way more interests than we thought there would ever be. But that was an interesting way to use an email list to just sort of test or gauge interest in just an idea you have with something that you are going to throw out.

**Emily Lewis:** [Agrees] It's like Kickstarter without the donations.

**Nate Croft:** Yeah.

**Lea Alcantara:** [Laughs]

**Jon Longnecker:** Yeah, yeah. [Laughs]

**Emily Lewis:** Well, since we're here, I know you guys didn't need this at this point, but we were talking about membership segmenting. I'm just curious, Lea, have you done anything with putting members in multiple groups or putting them in categories or something like that?

**Lea Alcantara:** I needed to, but at the time, these add-ons didn't exist, especially because the situation that I just explained that had a similar situation where I had to send to a subgroup or I needed to segment certain members and it wasn't available yet. The thing is there are add-ons that do help you add things to multiple member groups. I know that SolSPACE's User does use native EE categories so you can assign members to an ExpressionEngine category so you can create a member category group and then just give it sub-stuff and then you can use SolSPACE's User and deal with that if you're already using User. If you're not using User, there are two add-ons you can use. One is Addon Bakery's AB Member Categories.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Or IntoEEtive's Member Categories, which basically allows you to add members to several or more than one category.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** If you want to show conditional contents, those add-ons are more than capable of doing that. Oh yeah, and there is another one, VMG Chosen Member, which is free, and the problem with associating more than one member is if all you're wanting to do is segment the content, these category options are good enough. The problem is that there is still not one way to send to specific categories if you're mailing something.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So right now, when I had to do that, I actually had to create an SQL query.

**Nate Croft:** [Laughs]

**Lea Alcantara:** And it's actually pretty awful, but I actually created an ExpressionEngine template and then used an ExpressionEngine contact form and then I manually pulled specific members based on the category criteria and had it auto-populate the two functions in the form. [Laughs]

**Emily Lewis:** [Laughs]

**Nate Croft:** Wow!

**Nate Croft:** That sounds special, Lea.

**Lea Alcantara:** I know. I know.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** But I mean, for this particular project, it was the easiest way to have. I go to this thing and then it's automatically segmented in all these kinds of things, so I know that EE is clearly capable of being able to pull the information. I mean, the information is there. It's just how do I get it to send and auto-populate based on the specific criteria that I wanted to go with. So that's still a need I think that EE needs to fill.

**Emily Lewis:** Yeah, I would agree. I can comment on the Addon Bakery Member Categories add-on you mentioned because I'm using it right now in order to assign members to more than one category, but I don't have the need that you mentioned with regard to the mailing list. I'll say that for me and my needs, it's okay. I've had to actually sort of with the



combination of Stash and User and AB Member Categories get the content filtering that I needed. It was a bit of a pain, but I mean, I was able to do it.

**Lea Alcantara:** Great. Well, that's a lot of chatter about memberships.

**Nate Croft:** [Laughs]

**Lea Alcantara:** I think that's all the time we have for today.

**Emily Lewis:** Thank you, Nate and Jon, for joining us. In case our listeners want to follow up with you, Nate, where can they find you online?

**Nate Croft:** They can find me at Twitter [@natecroft](https://twitter.com/natecroft) and at [FortySevenMedia.com](http://FortySevenMedia.com)

**Emily Lewis:** And how about you, Jon?

**Jon Longnecker:** I am [@Necker47](https://twitter.com/Necker47) on Twitter and on FortySeven as well.

**Emily Lewis:** Great. Thanks again you guys.

**Lea Alcantara:** Perfect.

**Nate Croft:** Thanks for having us.

**Jon Longnecker:** Thank you.

**Lea Alcantara:** [Music] Okay, now we would now like to thank our sponsors for this podcast, [EE Coder](#) and [Pixel & Tonic](#).

**Emily Lewis:** We would also like to thank our partners, [EllisLab](#), [EngineHosting](#) and [Devot:ee](#).

**Lea Alcantara:** Also, thanks to our listeners for tuning in. If you want to know more about the podcast, make sure you follow us on Twitter [@eeepodcast](https://twitter.com/eeepodcast) or visit our website, [EE-Podcast.com](http://EE-Podcast.com).

**Emily Lewis:** And don't forget to tune in to our next episode when Leevi Graham will be joining us to talk about site themes.

**Lea Alcantara:** This is Lea Alcantara.

**Emily Lewis:** And Emily Lewis.

**Lea Alcantara:** Signing off for the ExpressionEngine Podcast. See you next time.

**Emily Lewis:** Cheers.

**00:45:22** [Music stops]