



Upgrade Guide

A guide to upgrading to MCP4

This guide will explain all the steps that are needed to go from MCP 1.3.x to MCP4

MCP4

Introduction

The purpose of this guide is to explain the steps of upgrading to MCP4.

By the end of this guide you will be able to,

1. Configure a Payment Processor
2. Add a new User
3. Add a new Order
4. Transfer control from MCP 1.3 to MCP 4
 - a. Create new Buy Buttons to sell your Products
 - b. Update your .htaccess files to point to the new .htpasswd files

This guide is the “minimum” needed to upgrade, so much of the advanced features and options of MCP4 are not discussed.

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Getting Started

Basic Assumptions

In writing this guide we have made some small assumptions.

1. You have been notified by MCP staff that your upgrade is complete.
2. You are able to log into the Admin Area of MCP4 on your site.



Top Tip

MCP4 Admin Area is usually installed at: <http://www.yoursite.com/mcp4/admin/> (change the *yoursite.com* bit, to your own site name)

If you do not meet these assumptions you should first check the other guides in the [Support Area](#) or contact MCP4 Support Department directly.

Understanding how MCP4 works

In order to be able to use MCP4, it is important to understand how MCP4 works. There are 5 basic concepts in MCP4 that one should know,

1. **Protected Area** – a folder on your site that you wish to protect and sell access to.
2. **Product** – a group of 1 or more Protected Areas that has a price, that a customer agrees to pay in order to access the Protected Areas.
3. **Order** – probably the most important entity in MCP, an Order has two meanings,
 - a. Financial, a transaction from a credit card processor (e.g. PayPal)
 - b. Permission, an Order for Product, grants the User access to the Protected Areas of that Product.
4. **User** – your client, a member who has signed up or who you manually created.
5. **Buy Button** – A snippet of HTML code that allows a user to sign up for a Product.

To explain how MCP4 works in one line, you could say,

A **User** clicks a **Buy Button**, creating an **Order** for a **Product**, that grants them access to one or more **Protected Areas**.

Step 1. Logging in...

The first step is to log into the Admin Area :: Main Menu. You will have been provided login details in the email confirmation from MCP staff.

When you first login, you are presented with the main menu / dashboard. It will look something like **Figure 1**. All your previous Users, Products and Orders will already have been imported by the MCP staff for you. You are now ready to configure your Payment Processor.

The screenshot displays the MCP4 Membership Software Admin Area dashboard. At the top, there is a navigation menu with links for Home, Users & Orders, Products & Protection, Buy Buttons, Utilities & Newsletter, Tools & Settings, and Help. Below the navigation menu, a green bar contains 'Main Menu' and 'Logout' links. A confirmation message states 'You have been logged in admin'. The main content area is divided into three sections: 'Right Now' (a blue box showing order statistics and a list of recent orders), 'Helpful' (a green box with links to video tutorials, support wiki, and help desk), 'Quick Links' (an orange box with links to view users, user search, view orders, add order, and order search), and 'Latest Blog' (a yellow box with links to recent blog entries).

MCP4
Membership Software

Home Users & Orders Products & Protection Buy Buttons Utilities & Newsletter Tools & Settings Help

Main Menu Logout

✔ You have been logged in admin

Right Now

You have 3992 completed orders, with 1295 total users and 2 products.

[User822](#) placed an [order](#) for [Site Membership - \\$49.99/month](#) at 2008-06-12 19:05:23
[User98](#) placed an [order](#) for [Site Membership - \\$49.99/month](#) at 2008-06-12 18:25:29
[User283](#) placed an [order](#) for [Site Membership - \\$145.00/quarter](#) at 2008-06-12 17:50:25
[User1107](#) placed an [order](#) for [Site Membership - \\$145.00/quarter](#) at 2008-06-12 17:34:07
[User498](#) placed an [order](#) for [Site Membership - \\$145.00/quarter](#) at 2008-06-12 16:34:53
[User850](#) placed an [order](#) for [Site Membership - \\$145.00/quarter](#) at 2008-06-12 14:34:28
[User98](#) placed an [order](#) for [Site Membership - \\$49.99/month](#) at 2008-06-12 14:25:29
[User681](#) placed an [order](#) for [Site Membership - \\$49.99/month](#) at 2008-06-12 12:31:20
[User305](#) placed an [order](#) for [Site Membership - \\$49.99/month](#) at 2008-06-12 09:23:54
[User1277](#) placed an [order](#) for [Site Membership - \\$49.99/month](#) at 2008-06-12 05:54:18

Helpful

Checkout these useful resources:

- [Video Tutorials](#)
- [Support Wiki](#)
- [Help desk](#)

Quick Links

- [View Users](#)
- [User Search](#)
- [View Orders](#)
- [Add Order](#)
- [Order Search](#)

Latest Blog

Most recent MCP4 blog entries:

- [MCP4 installed and setup in 4:53!](#)
- [Making YouTube videos XHTML compliant](#)
- [MCP4 goes live...](#)

Figure 1

Step 2. Configure a Payment Processor

Payment Processors are 3rd party companies, like PayPal or 2CheckOut, that process credit cards and e-checks on your behalf. If you wish to accept payments online, you will need to have an account already setup with your desired processor, before continuing.

For the purpose of this guide, we shall setup the most common payment processor “PayPal –Recurring Billing”.

Step by Step Guide

1. At the Main Menu of the Admin Area, from the menu go to, “Tools & Settings” -> “Processors” -> (PayPal –Recurring Billing) “Configure” see **Figure 2**.
2. Enter in the settings as required.
 - a. “Enabled” – Make sure this is checked.
 - b. “PayPal Email Address” – This **must be** set to your **Primary PayPal Email Address**, setting to anything other than your primary PayPal email address will result in payment failure.
 - c. “PayPal Recurring Payments” – PayPal will set orders to “pending” for a number of reasons, check the boxes to allow these pending payments. Pending means that money has not been lodged into your account. Example: e-checks normally take 3-4 days to be processed and appear in your account. See **Figure 3**.
3. Finally press the “Save” button.

Figure 2

Edit Processor - PayPal -Recurring Billing

Enabled 

PayPal Email Address 

PayPal Recurring Payments Allow E-checks
 Allow non enabled currencies
 Allow sales from international (non USA) buyers
 Allow sales from unverified buyers
 Allow sales from buyers with an unverified billing address
 Allow sales set to pending for an unknown reason

Save

Figure 3

Step 3. Creating a Buy Button

A Buy Button is merely a link (URL) that allows visitors to signup and become customers. Buy Buttons can be links (for emails) or <form> objects (for HTML pages).

Each Buy Button has to be configured individually.

MCP4 has a “Buy Button Wizard” that guides you through the process of collecting all the required info, before generating a unique Buy Button. Depending on the payment processor been used, the wizard will collect slightly different info.

For the purpose of this guide, we are using the “PayPal –Recurring Billing” payment processor as configured in previous step.

Step by Step Guide

1. At the Main Menu of the Admin Area, from the menu go to, “Buy Buttons” -> “Add New Buy Button” (see Figure 4).
2. Select the Product and the payment processor that you want payment processed through and click “Next ->” (see Figure 5).
 - a. The “Buy Button Text” is only a preference and can easily be changed later.
3. Carefully fill out the next page as needed. MCP4 will put in defaults.
 - a. When using “PayPal –Recurring Billing” there are a number of fields to fill out. Trial periods are optional and can be left blank. The “Regular billing Cycle” section is the most important. See **Figure 6**.
 - b. If you are using a different payment processor, then the wizard will display a slightly different screen than Figure 6.
4. Next press the “Save ->” button.
5. Success! MCP4 will now generate the Buy Button HTML for you (**Figure 7**).
6. Now repeat this process for each of your Products until you have create a Buy Button for each Product you want to sell.



Top Tip

In order for a user to signup via MCP4, they **must** use a MCP4 generated Buy Button.

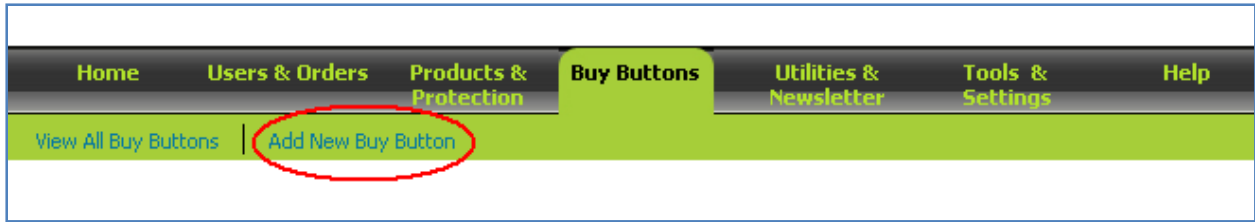


Figure 4

Buy Button Wizard

Step 1 of 3

Please pick the product and the credit card processor you want to use and press 'Next'.

Product • Premium Site Site Access ?

Processor • PayPal -Recurring Billing ?

Link Text • Buy Now! ?

Figure 5

... | This trial period should last | |

Regular billing cycle •

Subscription price: | Bill the subscriber for (This amount will be billed now, or as soon as any trial periods are over)

| Length of each [billing cycle](#)

Figure 6

Buy Button Wizard

Step 3 of 3

Your *Buy Button* has been created. To use, please put the HTML below into your Join / Sign Up page.

Using Link Method

```
<a href="http://www.yoursite.com/index.php/buy/button/1" target="_BLANK">Buy Now!</a>
```

- Example -

[Buy Now!](#)

Using <form> Method

```
<form action="http://www.yoursite.com/index.php/buy/button/1" action="post">  
<input type="submit" value="Buy Now!" class="button" />  
</form>
```

- Example -

Figure 7

Step 4. Transferring control to MCP4

The final task in upgrading your site to MCP4, transferring control to MCP4. Up to this stage, MCP 1.3 still has complete control. There are two steps in transferring control

- 1) Replace MCP 1.3 Buy Buttons with MCP4 Buy Buttons
- 2) Edit existing .htaccess files and point them to MCP4

Replace existing Buy Buttons

This is the straight forward task of replacing your existing Buy Buttons (**Figure 8 – Original Buy Button code**) with the new MCP4 generated Buy Buttons (**Figure 9 - MCP4 Buy Buttons**). Simply locate your signup page (perhaps signup.html) and replace the old Buy Button code with the new MCP Buy Button code.

```
0 10 20 30 40 50 60 70 80 90
1 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN"
2   "http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
3 <html xmlns="http://www.w3.org/1999/xhtml">
4   <head>
5     <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
6     <title>
7       Customer Signup Page
8     </title>
9   </head>
10  <body>
11    <div>
12      <h1>Customer Signup Page</h1>
13      This is the page where you put your promotional material (text, images, etc..) and
14      most importantly, where you put your Buy Buttons that allow people to signup.
15      <p>&nbsp;</p>
16
17      <form action="http://www.yoursite.com/cgi-bin/order/order.pl" method="POST">
18        <input type="hidden" name="x_action" value="buy">
19        <input type="hidden" name="x_product_id" value="10000000000">
20        <input type="submit" value="Buy product, pay thru PayPal">
21      </form>
22
23    </div>
24  </body>
25
26 </html>
```

Figure 8 – Original Buy Button code

```
0 10 20 30 40 50 60 70 80 90
1 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN"
2 "http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
3 <html xmlns="http://www.w3.org/1999/xhtml">
4 <head>
5 <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
6 <title>
7 Customer Signup Page
8 </title>
9 </head>
10 <body>
11 <div>
12 <h1>Customer Signup Page</h1>
13 This is the page where you put your promotional material (text, images, etc..) and
14 most importantly, where you put your Buy Buttons that allow people to signup.
15 <p>&nbsp;</p>
16
17 <a href="http://www.yoursite.com/mcp4/buy/button/1">Buy Now!</a>
18
19 </div>
20 </body>
21
22 </html>
```

Figure 9 - MCP4 Buy Buttons

Updating .htaccess Files

A .htaccess file is merely a file that contains a list of web server commands. In this case, commands to password protect a directory. The command that we need to update is the “AuthUserFile” command. This command tells the server (Apache) where to find the file that contains the list of usernames / passwords that are allowed access the folder/files.

Step By Step Guide

1. In your FTP client, go to the members only / protected directory (usually something like: /public_html/members/)
2. Download the .htaccess file to your computer.
3. Open the downloaded .htaccess file in a text editor (notepad will do, we use the free [PSPad](#))
4. Once opened, it will look something like **Figure 10** – Original .htaccess file.
5. It is the “AuthUserFile” line that we need to update, the rest can remain unchanged.
6. Change the path from:
AuthUserFile /home/yoursite/public_html/cgi-bin/order/data/.htpasswd
to
AuthUserFile /home/yoursite/public_html/mcp4/admin/config/htpasswd/.htpasswd

The Important thing to note here is the change from “/cgi-bin/order/data/” to “/mcp4/admin/config/htpasswd/”. See **Figure 11 - Updated .htaccess File**.

The part before this (/home/yoursite/public_html/) will vary depending on your server’s configuration.

```
0          10          20          30          40          50          60          70
1 # Membership Client Pro protected folder
2
3 order allow,deny
4 allow from all
5 require valid-user
6 Authname "Members Area - Protected by Membership Client PRO"
7 Authtype Basic
8 AuthUserFile /home/yoursite/public_html/cgi-bin/order/data/.htpasswd
9
10
```

Figure 10 – Original .htaccess file

```
0          10          20          30          40          50          60          70
1 # Membership Client Pro protected folder
2
3 order allow,deny
4 allow from all
5 require valid-user
6 Authname "Members Area - Protected by Membership Client PRO"
7 Authtype Basic
8 AuthUserFile /home/yoursite/public_html/mcp4/admin/config/htpasswd/.htpasswd
9
10
```

Figure 11 - Updated .htaccess File




If you have additional protected areas, then you will need to repeat the above process for each of them.







Congratulations, you have successfully upgraded to MCP4. The final step is to integrate MCP4 with your site.

Integrating MCP4 with your Website

The Signup Process

Below is a screenshot walkthrough of the signup process. MCP4 adds 2 new pages

-  Pages that you create and control
-  Payment processor generated pages, created by PayPal, 2CheckOut, etc...
-  MCP4 generated pages (based on templates)

| A | B | C | D | E | F |
|---|---|---|---|--|---|
|  |  |  |  |  |  |
| Signup Page (signup.html) | Payment Processor | | MCP4 on Your Site | | Your Site (/members/index.html) |

A - User comes to your site, goes to the signup page you create (perhaps <http://www.yoursite.com/signup.html>) and clicks on the MCP4 generated Buy Button that you created and have put on that page.

B – User enters in their payment details

C – Payment processor displays a payment complete confirmation page

D – MCP4: The user is automatically prompted to pick a username / password

E – MCP4: Username signup complete page is displayed, along with a link to the Product page.

F – User follows the Product link and enters the “member’s only area” (perhaps <http://www.yoursite.com/members/index.html>), this is your page that you created that contains all the valuable content that the user is paying for.

Login Link

Regardless of which protection method selected while creating the protected area (Step 1), the simplest and best solution is to link directly to the “Members Only” page directly.

Example:

Already a member? Go straight to the `Members Only Area`.

If the user is not logged in, then the user will **automatically** be prompted to enter in their username / password. They will remain logged in until they close all their browser windows.

Lost Password Link

MCP4 comes with a built in lost password retrieval tool. To allow your users to retrieve their own lost password, simply link to `/mcp4/login/recover/` (assuming MCP4 was installed in default location)

Example

Lost your password? `Retrieve it`.

Conclusion & Resources

If you have successfully followed the above steps, then you are ready to start selling!

We hope that you have found this guide useful. It is the first step in discovering the power and benefits of MCP4. Any comments or suggestions about this document (or any other MCP4 support document) are welcomed via our [contact page](#).

Resources

If you have additional questions, you may find the following resources useful,

<http://www.mcp4.com/membership-software/support/> - MCP4 Support Area

<http://www.mcp4.com/wiki/> - Wiki

<http://www.mcp4.com/helpdesk/> - MCP4 Help desk