Build a Membership Community

Quick reference to build your membership community in Simplero.
Make a copy and check off each step as you go!

Before You Start

A few things worth thinking through and gathering before you dive in:

- ☐ Logos (light/dark mode), favicon, card image
- ☐ Style Guide: colors, fonts, buttons
  - ☐ *This feeds your navigation, buttons, and colors everywhere on the site, so it's worth setting before you build*
  - ☐ *For a deeper pass on branding, check out our Branding Personalization Workshop*
- ☐ Rough copy or descriptions ready to go (or plan to use Write with AI)
- ☐ Decide what you want the experience to feel like: what's open to everyone vs. gated behind a group, course, or product
  - ☐ *Picture the flow: if you were joining this community for the first time, what would you want to see first, and where would you want to be led next?*
  - ☐ *None of this needs to be finalized before you build. Logos, colors, and fonts can all be added or changed anytime.*

Site Foundation

Build the product and site together with the Product Wizard (Sales > Products > Product Wizard), or go straight to Content > Sites to build the site first and connect a product later. Either way, one site can connect to multiple products, so you don't need a separate site per offer.

- ☐ Site name and description. Keep it simple for now, you can refine the wording anytime
- ☐ Choosing “Community” as your site type sets your homepage to the feed by default
  You can change this later
- ☐ Select your Style Guide
- ☐ Features: Choose which features you want available in your community, such as forums, groups, courses, events, blogs, landing pages, or bots.
  These selections shape both your site’s navigation and what you see in the admin area, so start with what you’ll actually use. You can always turn more on later

Configure Your Site

Content > Sites > [Your Site] > Configure

- ☐ Site access: Private / Join / Open
- ☐ Optional: Add a custom domain, this needs to be added under your Change Your URL settings first
  You can also create a subdomain for this site. For example, if you own yourbusiness.com, you could use community.yourbusiness.com for your membership community.
- ☐ Notification defaults (this applies to all new members. Individuals can update things later)
  Auto-turns on email, app, and browser notifications for the blog and forum posts

- [ ] Member directory: doesn't need to be in your navigation, but must be on if you want members to be able to mention each other
- [ ] Member-to-member chat
    - [ ] *Restrict to a product if you want it to be a paid perk*
- [ ] Engagement points, badges, and leaderboard
    - [ ] *Customize badges in Settings > Community > Engagement Badges*

None of this is required to launch. Most of this can be changed anytime, though notification defaults only apply going forward for new members.

Site Forum

[Your Site] > Forum > Forum Settings

This is the free space that comes automatically with site access. The page title doesn't have to say “Forum,” customize the label from your site's navigation settings. You don’t need to have the site specific forum if you want it to be gated.

- [ ] Add a description
- [ ] Set posting and comment approval settings
- [ ] Add categories if you want topic-based organization, scoped so posts don't cross into the wrong one
- [ ] Preview the forum as a member
    - [ ] *(Optional) Add and pin a welcome post*

Groups

[Your Site] > Groups

Groups give you a smaller, deliberate space than the site forum, useful when only part of your community should be talking together, like a paid tier, a specific course, or a mastermind.

- [ ] Name and description
- [ ] Set to Public, Private, or Secret
- [ ] Check the group's admin view (three-dot menu > Access) to see how members currently get access
- [ ] (Optional) Add a welcome post
- [ ] Preview the group and confirm the right members can see and access it

Helpful to know: you can grant group access directly from a product's Content tab, which works across multiple products, or use a trigger on a product Variant if access should be limited to specific prices or tiers.

Courses

[Your Site] > Courses

- [ ] Set the course to Dripped if it should be restricted to specific purchases, or Published if anyone with site access should see it
    - [ ] *Individual lessons can still be set to Dripped if you want content to unlock over time*
    - [ ] *A Dripped course lets you connect a product directly to it, as an add-on or a standalone one-off sale*

- [ ] *Selling this course inside a broader membership too? A Dripped course can also be added to your membership product, so it works both ways at once*
- [ ] Add downloadable resources directly inside the course if you want a built-in resource library, or attach a resource to a product instead
- [ ] Connect a group or event series here so everything tied to this course lives in one place
- [ ] Add your modules and lessons
- [ ] Preview the course to confirm drip and restrictions are working as intended

Events

Content > Events

For the full walkthrough of recurrence, reminders, and registration settings, follow the Events Workshop. Here's what matters most for connecting it to your community.

- [ ] Create the event series and add it to your site so it can be listed on the calendar, a course, or a page
    - [ ] *Restrict to the correct product(s) so only the right members can register*
- [ ] Turn on registration, and consider automating it.
    - [ ] *Add a trigger to register members on purchase/activation and cancel registration on downgrade/cancellation*
- [ ] Not using the site's built-in calendar? Build a landing page instead and add the event there, with the same product or tag conditions if you want to control visibility
- [ ] Preview as a member with and without access to confirm what's visible and what isn't

Connect It All

the three-dot menu > Access (on site, course, or group)
Courses, groups, and events have the ability to either go all from the same product or within the course's settings.

- [ ] From a course, connect its group and event series directly so access flows together automatically
- [ ] From your product's Content tab, confirm which site, forums, groups, courses, and events it unlocks
- [ ] Confirm what happens when someone cancels or their access expires
- [ ] Not sure who has access to something? Check the Access tab on the site, course, or group. It lists every product, automation, or trigger granting entry

Navigation & Pages

Site > Layout & Navigation

Clear navigation helps members find their way around, especially in the app where there's less room to explore. Add what members will actually use, and leave the rest out.

- [ ] Add links for the forum, groups, courses, events, and any pages you want front and center
  Use My Courses, Course Catalog, and My Groups to group multiple access points together instead of linking each one individually
- [ ] Drag to reorder, and rename labels and icons to match your brand voice

- [ ] Landing pages can be used just like any other page on your site: a home base for a course, an event, or a specific offer, depending on what you need
  Want a page to show different content to different members? Add a section condition by tag, product, or list
- [ ] Preview navigation on desktop and in the app to confirm it matches the member journey
  Grant your own admin contact access to the site so you can preview it in the app too

Final Check (Before You Launch)

- [ ] Purchase or grant access as a test contact
- [ ] View in an incognito window and log in as a non-admin test user, especially if your site is set to Join
- [ ] Confirm access to the site, forum, groups, courses, and event registration
- [ ] Cancel and confirm access is removed everywhere it should be
- [ ] Not sure who has access to something? Check the Access tab on the site, course, or group
  It lists every product, automation, or trigger granting entry
- [ ] Ask yourself: does this feel like the experience you pictured back in Before You Start?
  Nothing here is final. Branding, access, navigation, and everything else can be updated anytime as your community grows.

Nothing here is final. Branding, access, navigation, and everything else can be updated anytime as your community grows. Feeling unsure about any of this? Reach out to support@simplero.com anytime, we're happy to help.

*Note this is up to date to current UI and account options as of July 2026