Super User Guidebook

Approved by Steven Ingley

ISMS Management Representative

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Super User Guidebook

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1   Introduction

Multiverse is an advanced software solution for businesses who wish to sell online and have complex requirements.

The guidance contained herein is for general use of Multiverse and may describe some features and functionality that is not enabled in your environment. This may be because it has been intentionally disabled for you, or that your current software license does not permit its use. To request changes to your configuration and/or the features available, please contact us at support@sigmatechnology.co.uk.

Wherever you see a word or phrase in *Italics*, this relates to an area of the system; either a type of content, or a function/module. You should be able to find these in the menus and from the main dashboard once logged in.

2   User Interface

2.1   Logging In

Simply navigate to /admin on your domain name to be presented with the login screen. For example: *www.mydomain.co.uk/admin*

Login using the username and password that have been provided to you.

Passwords are *cAsE sEnSiTiVe*, and you will be forced to change this password the first time you login. Please, never write your password down anywhere – if you forget the password it can always be reset.

Notes:

- Depending how your version of Multiverse is configured, the admin account may be disabled in preference of individual administrator accounts.

2.2   Getting Around

Upon login, you will usually be presented with the Dashboard (unless you tried to access an administrator link directly and were then asked to login).

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The menu, available by tapping the hamburger icon at the top-left of the admin console, groups functions together for ease:

- 'Dashboard' takes you back to the main page.
- 'Content' displays all types of content you can edit, such as *Pages*, *Content Blocks*, *Products*, *Events* etc.
- 'eCommerce' displays order processing, stock control, invoicing and purchasing options.
- 'Users' specifies the different types of accounts available for management.
- 'Advanced' provides tools for the configuration and promotion of your website.
- 'View Live Website' opens the front-end website in a new tab so you can admire your work.
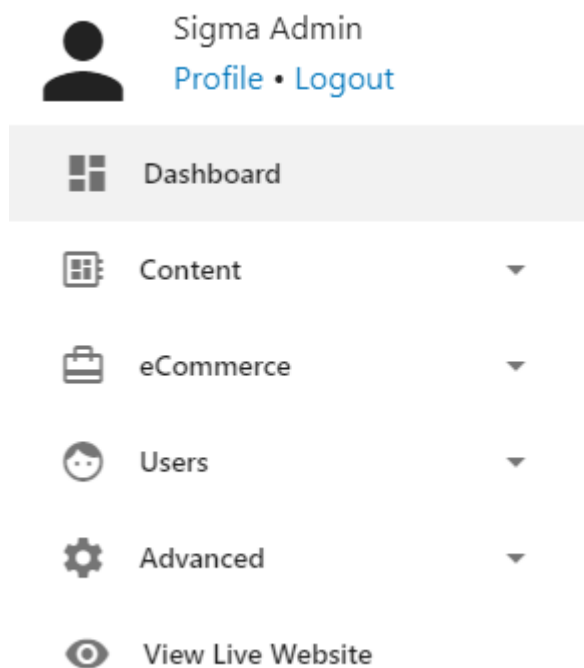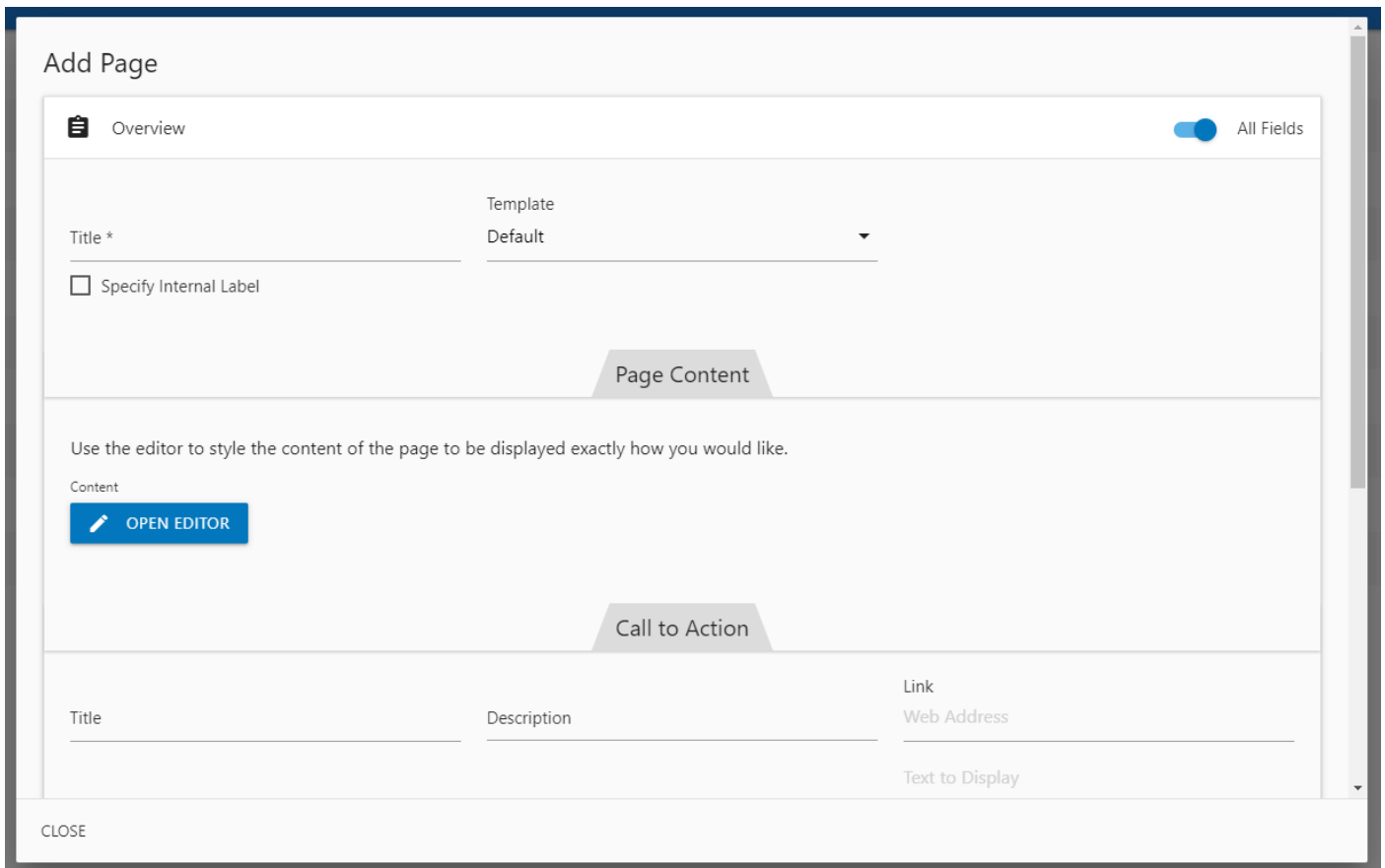
2.3   Creating Content

At the top-right of every content-related screen, there are buttons to assist you with finding, analysing, and creating content.

Notes:

- The buttons may be hidden in certain scenarios based on deliberate restrictions in place on, for example, the creation of new types of content.

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Any fields marked with a * after their name are mandatory and must therefore be completed before the new content can be created. Simply complete the mandatory fields as a minimum and tap the pulsing 'Create' button at the bottom of the form.

If you don't see the field you're looking for, it may be hidden (if it is optional, and also currently empty). Tap the 'All Fields' toggle switch to see all fields.

2.3.1   HTML Editors

Anywhere you see the 'Open Editor' button, you can write more freely and customise the content you're creating using colours, styles and HTML.

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To launch the editor simply click/tap the button. You will then be presented will a full-featured editor, which if you've ever used a Microsoft Word or Google Docs you'll have no problem getting to grips with.

2.3.2   Adding and Handling Media

Multiverse supports all major media types including images, files and documents, video and audio. To add and manage media for an item, simply open the 'Media & Documents' section within the item's modal window.
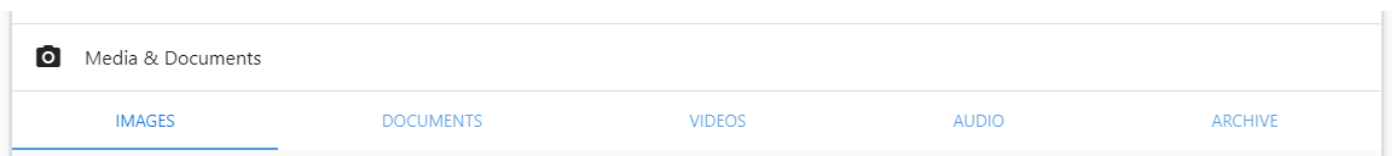
Notes:

- If the 'Media & Documents' section is missing then uploads of media have been restricted for the type of content being edited.
- If not all types of media are available to upload then uploads of these types of media have been restricted for the type of content being edited.

2.3.2.1 Featured Images

When you want an image to be displayed front and centre, use the 'Add Featured Image' button and Multiverse will automatically size and crop the image you upload so that it is the best fit for the position it is display in on the front-end website.

Featured images appear in listings such as *Categories* and will also be the primary image for content such as *Products*, *Events*, *Blog Articles*, *Galleries*.

Notes:

- If the 'Add Featured Image' button is not available, then featured images are not available for the type of content being edited.

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2.3.3   Viewing and Publishing

Controls are available at the top-right of each modal window, which allow you to quickly open the current content in a new tab so you can review what it will look like to visitors, and also toggle whether the content is published or not.

Simply click/tap the toggle switch to publish/unpublish the content.

2.4   Linking Content

The real power of Multiverse becomes apparent when linking together items you have created. All relationships in Multiverse are based on a parent > child model, and the system knows just what to do when you link together certain items. It handles all the complex logic and front-end generation for you. Here are a few examples:

Parent	Child	What Multiverse Does
Page	Content Block	Generates the child as a block within the parent.
Page	Slideshow	Generates the child as a block within the parent.
Page	Dynamic Feed	Generates the child as a block within the parent.
Product	Content Block	Generates the child as a block within the parent.
Event	Content Block	Generates the child as a block within the parent.
Menu Item	Page	Generates a link to the child within the parent.
Menu Item	Category	Generates a link to the child within the parent.
Product	Product	Upsells the child when the parent is being sold.
Product	Customisation	Generates the child as a question available for configuring the parent when it is being sold.

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Product	Component Part	Reduces the stock of the child by the number specified in the relationship settings when the parent is sold.
Product	Calculation	Dynamically alters the price of the parent based on *Customisations* chosen and their settings.
Ticket	Customisation	Generates the child as a question available for configuring the parent when it is being booked.

eCommerce

3   Products

Multiverse enables you to sell physical and digital products with ease.

3.1   Customisations

When you need to allow a customer to enter additional information relating to a *Product*, you can use *Customisations*. The easiest way to think of this, is that they are customising their purchase.

Common scenarios for use of *Customisations* include:

- Choosing different sizes of a product
- Choosing different colours of a product
- Recording inscriptions
- Printing images onto products
- Offering optional extras

3.2   Choices for Field Type

There are various field type options available for you to choose from, most of which can be made mandatory if you wish:

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Field Type	Description	Can Be Mandatory
Text Field	A single-line free text box.	Yes
Text Area	A multi-line free text box.	Yes
Number	Whole numbers only (e.g. 1, 50, 75)	Yes
Decimal	Decimal numbers to two decimal places (e.g. 1.01, 50.99, 75.00).	Yes
Date	A country-specific formatted date.	Yes
Time	A time in hours and minutes.	Yes
Colour	Colour picker with images displaying each colour. Can also be used for patterns/textures.	Yes
File Upload	Files can be added to the item (common image and document formats only).	Yes
Fixed Value	Becomes an option in a drop-down menu, list of radio buttons or checkboxes.	Yes *except checkboxes*

3.3   *Fixed Value Customisations*

When using 'Fixed Value' as the Customisation Type, it must be connected to a *Customisation Group*. Oftentimes, the easiest way to set these relationships up is to first create the Customisation Group, then add new/link existing Customisations to that group, specifying 'Fixed Value' for any new ones created.

A Customisation Group can be set up to display as:

1. Drop-down Menu (with or without multiple choices allowed)
2. Radio Buttons (select one choice from a list of two or more)
3. Checkboxes (optionally select any number from the choices)

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- Because of the nature of checkboxes, it is not possible to make them mandatory. If you need to make the Customisation Group mandatory, use either Drop-down Menu or Radio Buttons.

3.4   Charging Additional Fees for Customisations

It is possible to charge an extra fee on top of the base *Product* price for any *Customisation*. To do so, enter the VAT-exclusive additional fee into the *Price Effect* field within the *Customisation*.

When a user chooses a specific option that has a *Price Effect* defined, this additional fee will be added to the product's base price. For example, a £10 product with a £2 *Price Effect* would cost £12, or £14.40 including VAT at 20%.

3.5   Linking Customisations

An unlimited number of *Customisations* (questions) can be added to *Products*, and when an item is purchased these questions will be asked to the customer, allowing them to 'Customise' their purchase.

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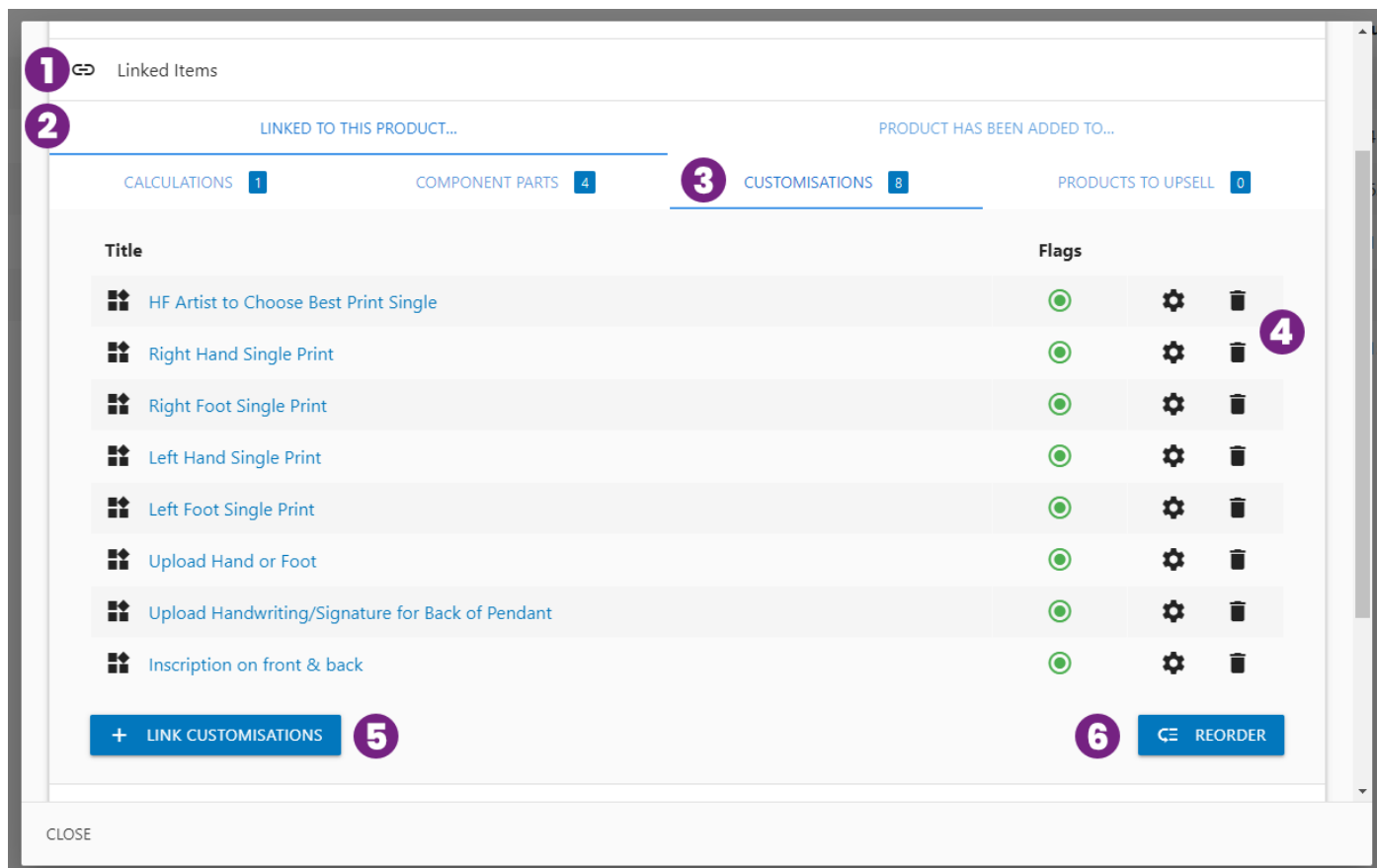
1. Tap the Linked Items heading to expand or contract this section.
2. Display parent or child relationships. By default, child relationships are displayed, unless only parent relationships are available.
   a. 'Linked to this Product' denotes child relationships.
   b. 'Product has been added to…' denotes parent relationships.
3. Linked items are separated into type of item. Tap the heading to view the linked items of that type.
4. Controls for each linked item
   a. Tap the cog to access advanced settings for the relationship.
   b. Tap the bin to remove the relationship (all settings will be lost).
5. Link more existing Customisations, or create new Customisations and automatically link them once created.
6. Change the order of the Customisations – in this example this allows you to change the order of the questions being asked for configuring the Product.

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- The headings on each tab will change depending what you are linking. For example, linking a *Product* to another *Product* the tab heading displays 'Products to Upsell', meaning that Multiverse will automatically promote the linked *Products* for you when a customer is browsing this product.

3.6   Advanced Price Calculations

Multiverse can run complex calculations based on *Customisation* choices. We do not recommend you set this up yourself; please contact us if you would like to use this feature so that we can discuss your requirements and decide if this is the best solution for your needs.

4   Stock Management

Multiverse comes with advanced stock management features, which when configured correctly will automate your stock control, flag items that are low in number, and allow you to easily reorder them using *Purchase Orders*.

4.1   Availability

There are three *Availability* statuses that can be set on *Products*, *Component Parts* and anywhere you see the *Stock Control* heading. How Multiverse handles items with each status, upon different actions, is defined below.

Availability Status	When Sold	Order Cancelled	Purchase Order
Obey Stock Levels	Allowed if the stock exists, or if *Strict Stock Control* is disabled.	Restocked if *Restock Items* is ticked upon cancellation.	Quantity received added to stock.
Always in Stock	Always Allowed	No Action	No Action
Out of Stock	Not Allowed	No Action	Quantity received added to stock.

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If you are not sure which status to choose, we always advise selecting *Obey Stock Levels* as this is the safest way to ensure items are not sold accidentally when they are out of stock.

4.2   Minimums and Maximums

Minimum and maximum stock levels can be configured to enable Multiverse to assist you with stock management. Setting the minimum and maximum values for a *Product*, *Component Part* etc. will then display the item on the Stock Control screen.

- Setting the Minimum value will flag the item so that you are immediately aware that the stock value has fallen below the minimum.
- Setting the Maximum value will enable Multiverse to automatically calculate the number required to be added to a *Purchase Order* to bring your stock value back up to the desired level.

Please see the Purchasing section of this document for further information on how Stock Control interacts with this area.

Event Management

5   Events

Multiverse is a powerhouse of event management and provides the tools and configuration options required to host any type of event imaginable.

5.1   Fields and Uses

Optional fields may be hidden by default to save scrolling and to reduce confusion when creating a new *Event*. You can enable optional fields at any time by toggling the *All Fields* switch.

Most fields have intuitive names and tooltips to assist you with knowing what information to fill in. For the less obvious fields, details of their uses and behaviours can be found in the table below.

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Field Name	Usage	Empty Behaviour
Availability	'Hidden' events are not added to the sitemap or listed on the front-end website. 'Private' events can only be accessed by administrators.	Defaults to 'Public'
Available From	Defines the date and time the Event can be booked from. Useful to prevent bookings before a specified date and time.	Available as soon as the Event is created
Available Until	Defines the date and time the Event can be booked until. Useful to prevent bookings after a specified date and time.	Available until 60 minutes before the Event's Start Time

Notes:

- A minimum of one *Ticket* is required to be added before an *Event* can be booked.
- Add an image to your *Event* to make it more engaging. You will be required to crop the image to specific dimensions to ensure it fits in the space properly.
- You can add documents to the *Event* and they will appear as downloads at the bottom of the *Event Description.*
- If you do not add a *Location* to the *Event*, it will display 'Location TBC' until one is added.
- If the map is not appearing for your *Event*, ensure you have dropped the pin on the map in the *Map* section of the *Location.*

5.2   Tickets

It is important to understand that delegates do not technically book onto an *Event*; they book a *Ticket* for an *Event*. Therefore, a minimum of one *Ticket* is required to be linked to the *Event* before it can be booked. Multiverse will automatically prompt you to add a *Ticket* immediately after creating a new *Event*.

By default, only the *Title*, *Price* and *Current Stock* (may be called *Places Available* in your system) fields are mandatory. Some fields may be configured to be predefined and/or read-only to reduce the amount of data input that you need to do when creating new *Tickets*.

5.2.1   Fields and Uses

Optional fields may be hidden by default to save scrolling and to reduce confusion when creating a new *Ticket*. You can enable optional fields at any time by toggling the *All Fields* switch.

Most fields have intuitive names and tooltips to assist you with knowing what information to fill in. For the less obvious fields, details of their uses and behaviours can be found in the table below.

Field Name	Usage	Empty Behaviour
Start Date/Time	Defines when the Ticket is valid from. Useful for example, when an Event takes place over multiple days, and a Ticket is only valid for one day.	Assumes the Event's Start Date/Time
End Date/Time	Defines when the Ticket is valid to. Useful for example, when an Event takes place over multiple days, and a Ticket is only valid for one day.	Assumes the Event's End Date/Time
Available From	Defines the date and time the Ticket can be booked from. Useful to prevent bookings before a specified date and time.	Assumes the Event's Available From Date/Time
Available Until	Defines the date and time the Ticket can be booked until. Useful to prevent bookings after a specified date and time.	Assumes the Event's Available Until Date/Time
Maximum per Person	Restricts the number of this Ticket that can be booked by each user.	Unrestricted unless globally configured
Require Printed Proof	Changes the behaviour slightly so that Tickets are automatically attached to confirmation emails, and notifies the user that a printed Ticket is required.	Will not prompt the user to print the Ticket
Price	When charging for an Event, you can specify the tax-exclusive price for the Ticket. Remember to also set the accompanying Tax Rule to ensure VAT is calculated correctly (if you are VAT registered).	Ticket will be free of charge

Notes:

- A *Ticket* **should not** have the same *Title* as the *Event*. Instead you should describe the type of *Ticket*, such as 'Delegate' or 'VIP', or for multi-day events, 'Saturday Ticket', 'Sunday Ticket'. This will ensure your event looks as professional as possible.
- *Tickets* that have already been purchased cannot be deleted/removed from the *Event*.

5.2.2   Capacity Management

Limiting the total capacity of an *Event* is done by setting the *Current Stock* (may be called *Places Available* in your system) for each *Ticket*. The number of places available will automatically decrease when a booking is received and increase when a booking is cancelled.

To increase/decrease the total number of places, simply adjust the total number available, whilst bearing in mind the current total number of bookings.
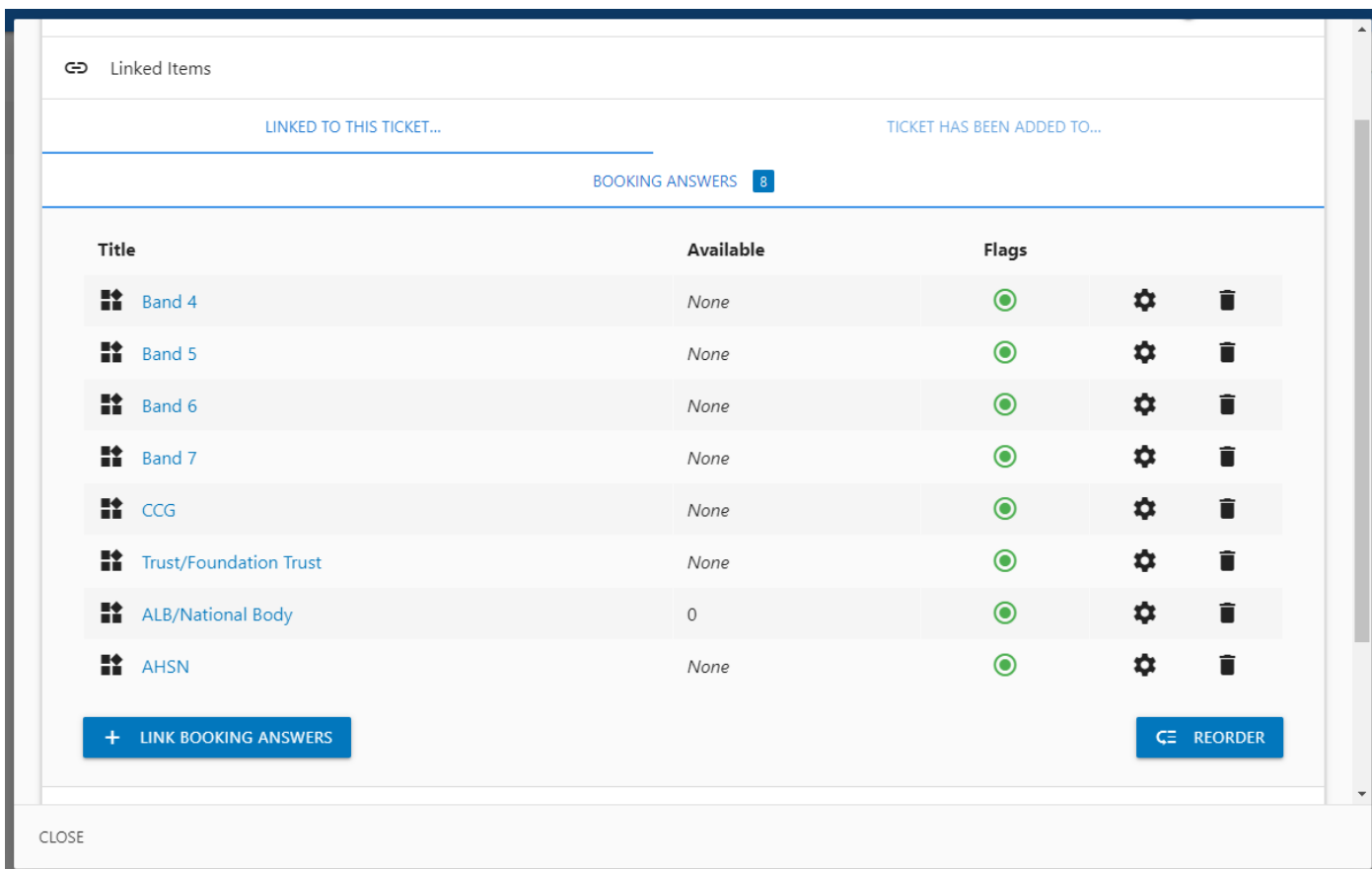
Notes:

1. For an explanation of how the *Availability* field works, and how Multiverse handles stock and capacities, please see the Stock Management section of this guide.

5.3   Customisations

Customisations work in a similar way for *Events* as they do for *Products*, whereby they allow a user to customise their booking. In most Event Management use cases, this is used to collect additional information from the delegate that is required to deliver the event, including:

- Workshop Choice(s)
- Meal Choice(s)
- Other optional items and up-sells

One important difference to note is that the *Customisations* are linked to each *Ticket*, not the *Event* itself. This allows you to ask different questions for different tickets, making Multiverse more flexible for each event's individual needs.

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If you are only using Events in the system and not Products, we may have chosen to rename 'Customisations' to something more intuitive, such as 'Booking Answers'. In this case, 'Customisation Groups' will also likely become something such as 'Booking Questions'. This is just a name change to improve usability and does not affect the behaviours of the system.

Please refer to the Customisations section within the Products section of this guide for more details on the types of options available to you for capturing the information you need, and how to add/manage *Customisations*.

Notes:

1. Information relating to dietary and accessibility requirements should be stored against the delegate's account, not on a per-event basis. This saves the delegate from having to enter the same data more than once and means they can easily update this information across all events if something does change.
2. If you export delegate information, either to a PDF or Excel file, Multiverse will **not** notify you of changes to dietary and accessibility requirements, so it is always best to export this data as close to the event's start time as possible.

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3. You must always ensure compliance with GDPR legislation. Only collect additional data from delegates that is **absolutely necessary** and that you have a legally justifiable use for.

5.4 Managing Customisations

Tap the 'Link Booking Answers' button and then choose 'From Existing Booking Answers' to launch the Link Manager.
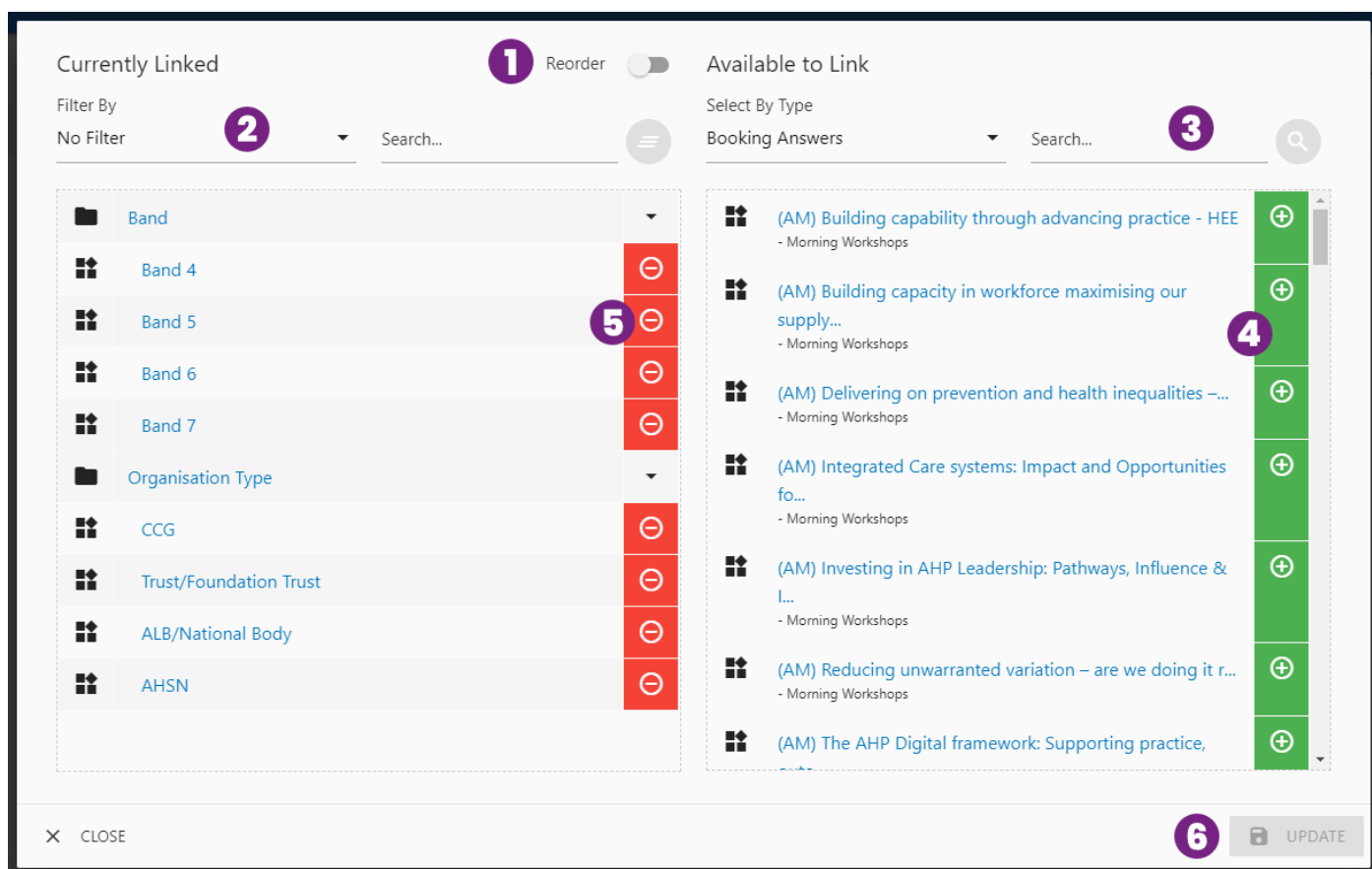
1. Tap to enable reordering functions, which will disable the + and – functions temporarily. Simply drag and drop the questions and answers until they are in the desired order. Dragging an item from the folder level (heading) will drag all items that are within it.
2. Choose the filter to display on certain types of items that are **already linked** to the Ticket, or use the 'Search…' field to find the one you need (minimum 3 characters).
3. Choose the filter to load all types of items that are **available to link** to the Ticket, or use the 'Search…' field to find the one you need (minimum 3 characters).
4. Tap the green + icon next to the option to add it to the 'Currently Linked' section.

5. Tap the red – to remove it from the 'Currently Linked' section. For items that are already linked, this will display a trash icon, signifying that the item is marked for removal upon clicking the 'Update' button.
6. Tap 'Update' once finished to commit your changes instantly.

5.5   *Advanced Price Calculations*

Multiverse can run complex calculations based on *Customisation* choices. We do not recommend you set this up yourself; please contact us if you would like to use this feature so that we can discuss your requirements and decide if this is the best solution for your needs.

Invoicing

6   Order Confirmations

TBW

7   Bulk Invoicing

TBW

Purchasing

8   Purchase Orders

TBW

Tools and Special Features

9   Search Engine Optimisation

Multiverse comes as standard with some great Search Engine Optimisation tools.

TBW

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