HOW TO:

NMUG SITE ADMIN
VERSION 1.0

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READ FIRST

NOTE: Please be careful with the subscriptions and transactions. They are tied to both PayPal and Stripe and if there is a mismatch, that user's subscription may no longer work properly.

Site Terminology:

- **Members:** These are users who have signed up to the site. A member can be someone who is trying out the site, an active members, or a past member. This also includes any staff or comped memberships.

- **Subscriptions**: A subscription provides access to content or features for a specific period of time, whether recurring or non-recurring. For example, an annual auto-renewing subscription, or a one-time annual access subscription are both subscriptions. A Subscriptions are used by PayPal and Stripe, so anytime payment is made with one of these gateways, a subscription is created. If we add a member manually, subscriptions are not created.

- **Memberships:** A membership provides access to content or features on the site, such as weekly meetings or an individual class. Memberships are purchased through recurring subscriptions that auto-renew, or non-recurring subscriptions that grant access for a set period of time. For example, a "Class" membership could be purchased with a non-recurring membership subscription that gives access to a specific class, or an annual recurring subscription give access to our weekly meetings.

  - **Recurring**: These renew every year.

  - **Non-Recurring**: These expire after a year.

  - **Classes**: Coming soon.

- **Transactions**: A transaction is a single payment made by a member. Transactions can be one-time purchases like non-recurring subscriptions, or recurring payments like auto-renewing subscriptions. Transactions are applied to a subscription. For example, when a member purchases a non-recurring annual subscription, that initial payment is a one-time transaction. If they purchased an annual auto-renewing subscription, each year when a new payment is made, a new transaction is created for that subscription

In summary:

- Subscriptions provide access to content for a period of time, whether recurring or non-recurring and are created with PayPall and Stripe payments. They are not created when a members I added manually.

- Memberships provide access to content and can be purchased via recurring or non-recurring subscriptions.

- Transactions are individual payments made by customers, including initial subscription sign-ups and any recurring subscription payments.

Backups: The site is backed up daily, so if something does go wrong, we can restore a backup. But if someone signs up or submits a group message in between when it was backed up and restored, we lose all that data. *We should not rely on a backup for experimenting.*

ADD NEW MEMBER MANUALLY

• **Search:** Search to see if they are already a member.

• **If you found a name**, they are already a member.

• **If no name was found**, they do not have an account on the site. Select **New Member.**

1. **Username**: Fill in a username. Username must be unique and there can be no spaces. I use the members first name and last name with a dash separating them.

2. **Email**: Email address of Member

3. **First Name**

4. **Last Name**

5. **Set Password**: You do not need to set a password, but you can if you want.

6. **Membership**: Set if it is a recurring or non-recurring. *When you add a member manually, in most cases this will be a non-recurring.*

7. **Amount:** The amount the member paid.

8. **Expire**: The expiration date of the subscription.
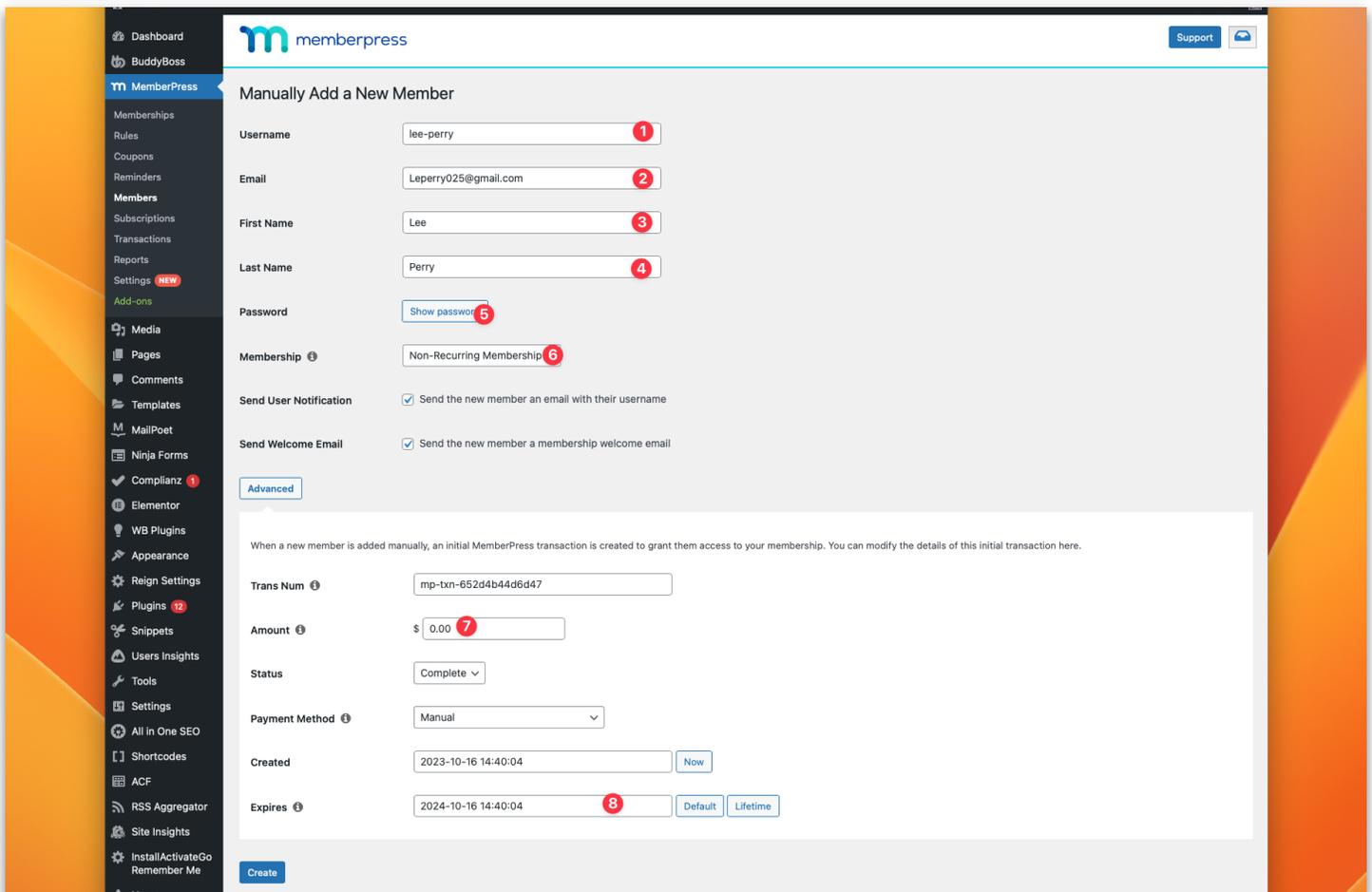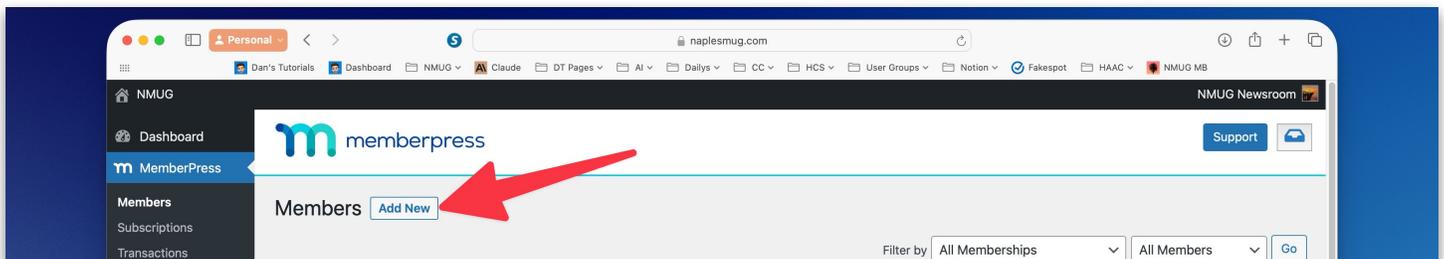
SET A NEW PASSWORD

• **Search:** Search the user.

1. Hover your cursor over the name to show Edit. Click on Edit.
2. Scroll to find the Password field and enter a new password.

CANCEL A SUBSCRIPTION

1. Select Subscriptions in the sidebar.

2. Search for the user. Select Any (slower) for a general search.

3. Hover your cursor over the name to show Cancel. Click on Cancel to cancel any recurring subscription.

EDIT A SUBSCRIPTION

When you edit a subscription, to change the date it renews as an example, you are actually editing the transaction tied to that subscription. So you need to find the transaction.

1. Select Transactions.

2. Enter the username, name, or email of the member.

3. Select Any (Slower) in the dropdown to expand your search so it includes any field.

4. In the results, hover your cursor over the latest transactions and click on Edit.

5. Scroll to find Expiration Date to change when the membership expires or renews,