Value Website
Training Guide

Still have questions? Please visit our help center at helpme.haleymarketing.com. Here you can search our knowledgebase, view training videos, and submit support tickets for additional assistance.

Contents

Getting started with your new website

Your site is set up and ready for you to update with your company details. Here are the steps you should take:

- Update the text on the pages
- Take your site live

These steps are detailed below, but before you can get started, you must get familiar with WordPress. This guide will assist you with getting started using your WordPress site. By no means is this guide an exhaustive list of features or instructions. More advanced information can be found on wordpress.org, other websites, or in various books. The information contained here is just meant to give you a quick start to using your new site.

Logging In

Your site was created with WordPress as your content management system. You must login to the WordPress Admin area of your site to make any updates to the site.

1. To access your WordPress CMS, enter your website URL into your web browser, adding /wp-managers/ to the end. For example, www.yourdomain.com/wp-managers/.

2. Enter your user name and password to login (*note that passwords are case-sensitive*).
   Select **Log In**. If you have not received your login information, please submit a request at
   http://helpme.haleymarketing.com.

   *If you have forgotten your password, select the Lost Your Password link at the bottom of the login form. Enter your email address or user name and click Get New Password to receive your new login credentials.

Getting familiar with the WordPress Dashboard

After entering your login information, your website dashboard will load, which looks like this:
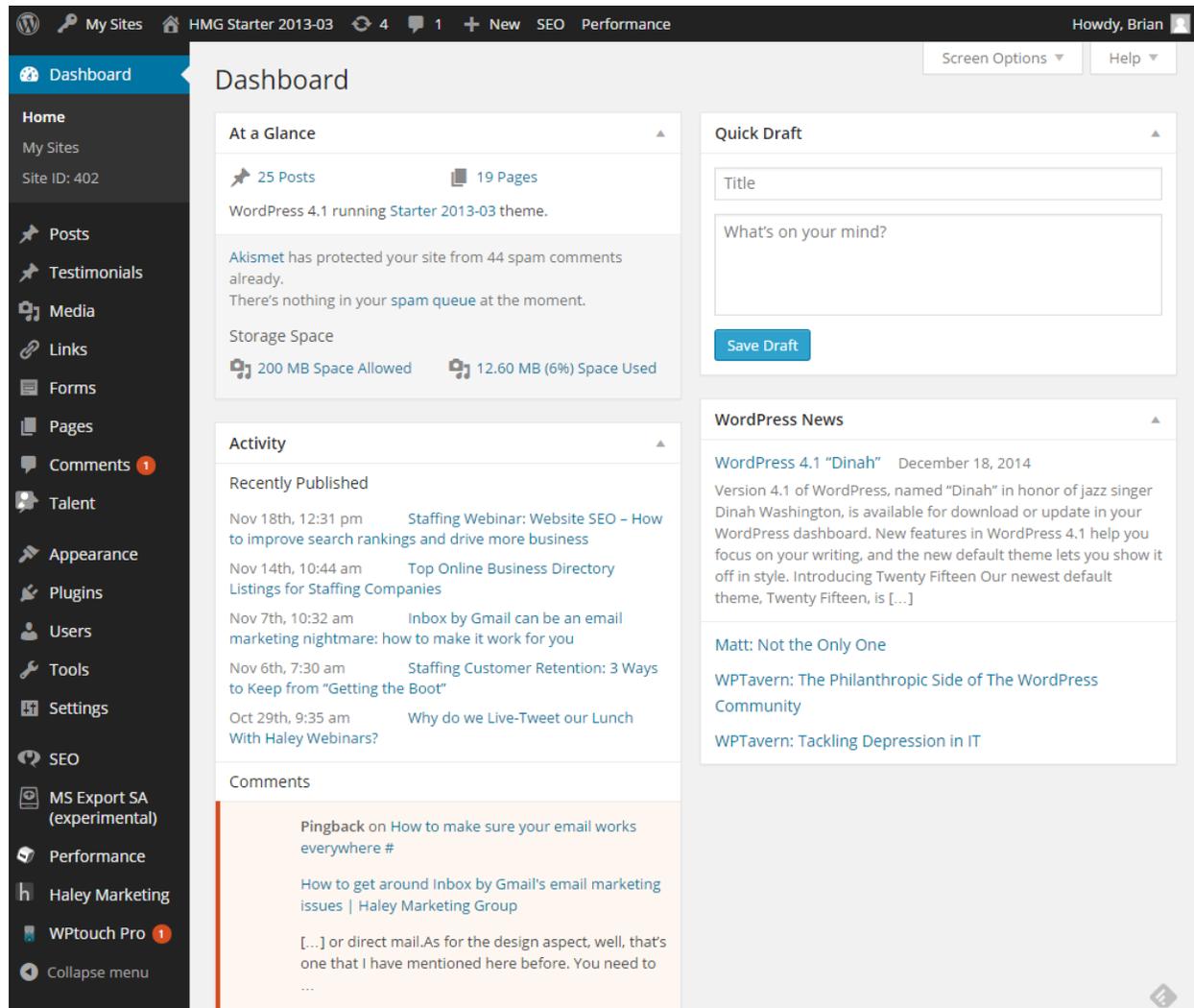
Take a moment to familiarize yourself with the layout of the dashboard. You can get help for any screen by clicking the Help tab in the upper right corner.

The left-hand navigation menu provides links to all of the WordPress administration screens, with submenu items displayed on hover.

Links in the Toolbar at the top of the screen connect your dashboard and the front end of your site, and provide access to your profile and helpful WordPress information.

Updating the text on pages

Your website was setup with starter content that must be updated before taking your site live. To do this, you will edit the existing pages:

- Select **Pages** from the main navigation. You will be directed to a page that contains a full listing of all the pages available on your site (if your site has a large number of pages, you may have to move to the next page to see the remaining items on the list).
- Hover over the page title to view editing options, or click on the page title to be taken to the **Edit Page**.
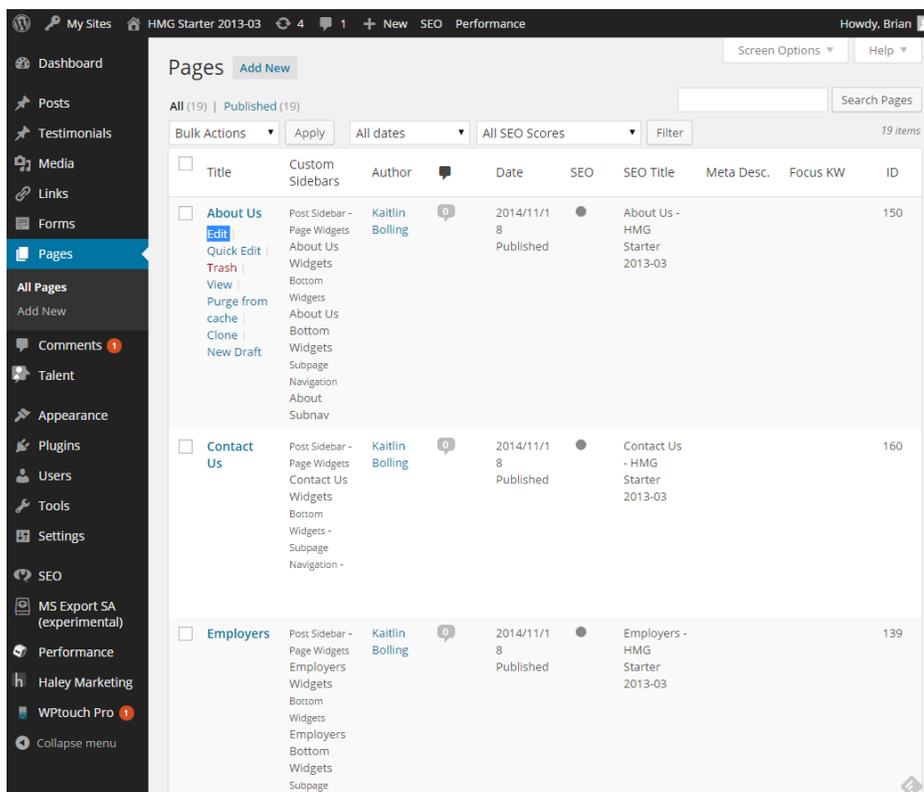
- The title of the page is used in menus and navigation. You may update these, but be aware there are limitations to how much text can be accommodated in the menus.
- Click on the main section to update the page text.
  You have two editing options: Visual and HTML. We recommend selecting the Visual editing option, as it presents a rich text editor toolbar that is very similar to working in Microsoft Word. If you select "HTML," you will have the opportunity to make changes using HTML code. We do not recommend attempting to use HTML unless you have experience using HTML on other websites.
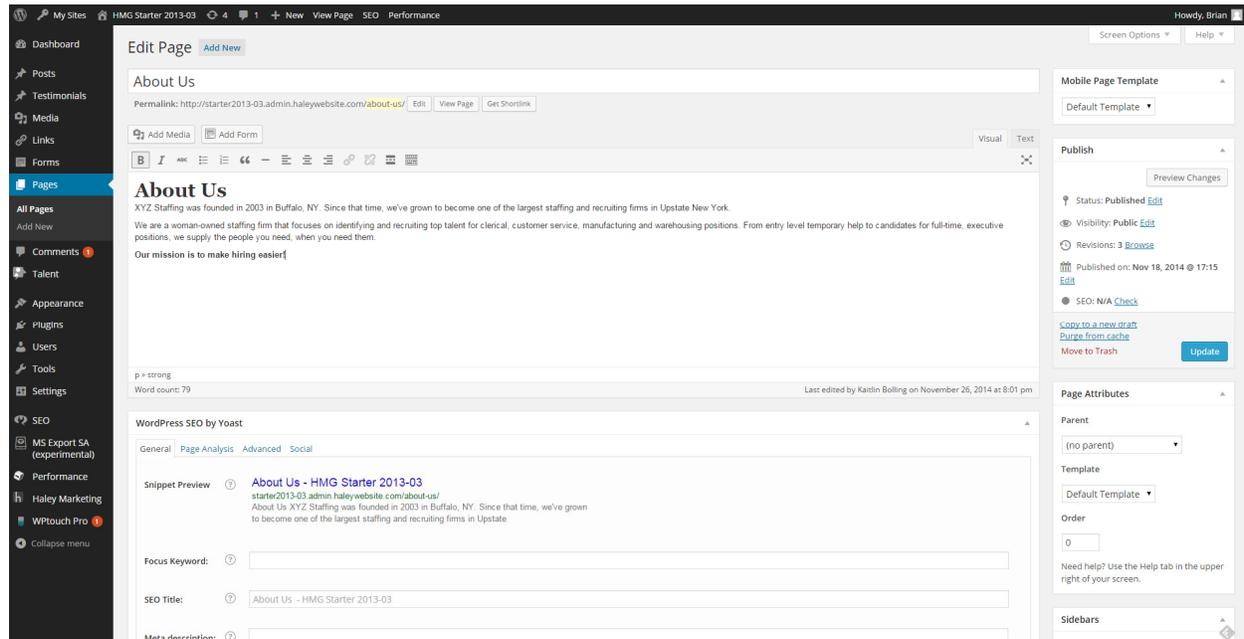
Basic page formatting in WordPress

Similar to many popular word processing applications, you can change the format of text by selecting one or more characters and clicking on the appropriate formatting option.

For example, to make text bold, select the appropriate text and click on the **B** in the toolbar. Similarly, to italicize text, select the appropriate text and click on the *I* in the toolbar.

## A note about using underlined text on web pages:

Most users expect underlined text on web pages to be hyperlinks. Therefore, it is generally considered bad practice to underline words or phrases, as it could confuse readers who are expecting underlined text to link somewhere.

Using the Rich Text Editor Toolbar
By default, the toolbar is displayed in minimal format. The majority of the text changes you will need to make can be handled with this version of the toolbar.

You can open the toolbar to the full view for advanced formatting by pressing the "kitchen sink" button.
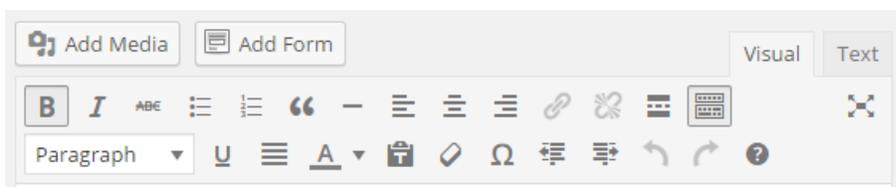
The buttons you will most commonly use are:

- *Text Formatting*
  To change the appearance of text, including using the styles that have been defined for your site, you can use several toolbar options. Simply select the text that you would like to format and choose the appropriate buttons.

- *Bullets and Numbering*
  You can choose to add bullet points or numbered lists by selecting a paragraph (or highlight multiple paragraphs) and selecting the appropriate option from the toolbar.

- *Undo & Redo*
  The undo and redo buttons allow you to step through your changes while editing.

- *Text Alignment*
  You can choose to align your text left, center, or right using the respective buttons in the toolbar. To do this, click a paragraph (or highlight multiple paragraphs) and select the appropriate option from the toolbar.

- *Paste from Word*

  We strongly recommend that if you are cutting and pasting text from Word, that you use the Paste from Word option. This will strip out any Word formatting that could render wrong or even break your site. Just press the button and paste your text into the box provided.

- *Hyperlinks*

  To create a hyperlink, or "link", to a web page or file, you can use the Insert/Edit Link tool. There are two toolbar buttons for working with links. The first one allows you to create links in your content and the second one allows you to remove links from your content.

  To create a link, select the text that you would like to make a link and click on the Insert/Edit Link button. The following dialog will appear.
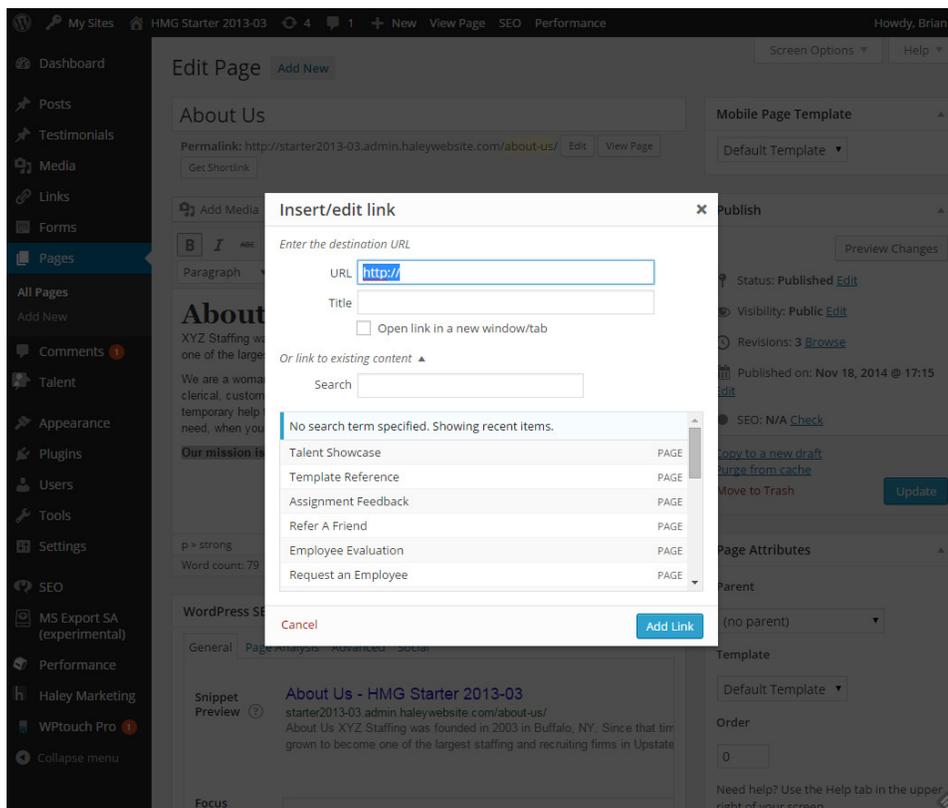
  The Link URL is simply the location of the webpage, document, or other resource on the Web. A URL usually looks something like this: http://example.com/path/to/filename.ext.

  If you are linking to a web page or file outside of your website (on another website, for example), you will need to copy and paste the URL into the Link URL field. You can usually copy URLs directly from the address bar in your browser. When linking to an outside website, we

recommend checking the box next to "Open link in a new window/tab." That way, visitors to your site will always have a window open, making it easy to return to your website.

If you are linking to a web page on your site, it is best to open the "*Or link to existing content*" area and search for the page to which you want to link. This way if the page name or URL changes, the link will continue to work.

- *Inserting/Editing Images & Media*   Upload/Insert 🖼
You have the option of adding images and media (including PDFs and other file types) using the icons above the formatting toolbar. For web use, lower resolution images and files are suggested. This will improve load times for visitors to your site. We recommend adding files that are smaller than 1mb, or under 800x600 pixels.

To insert an image into your content, place the cursor where you would like the image to appear in the document and select the appropriate icon. The following dialog box will appear:
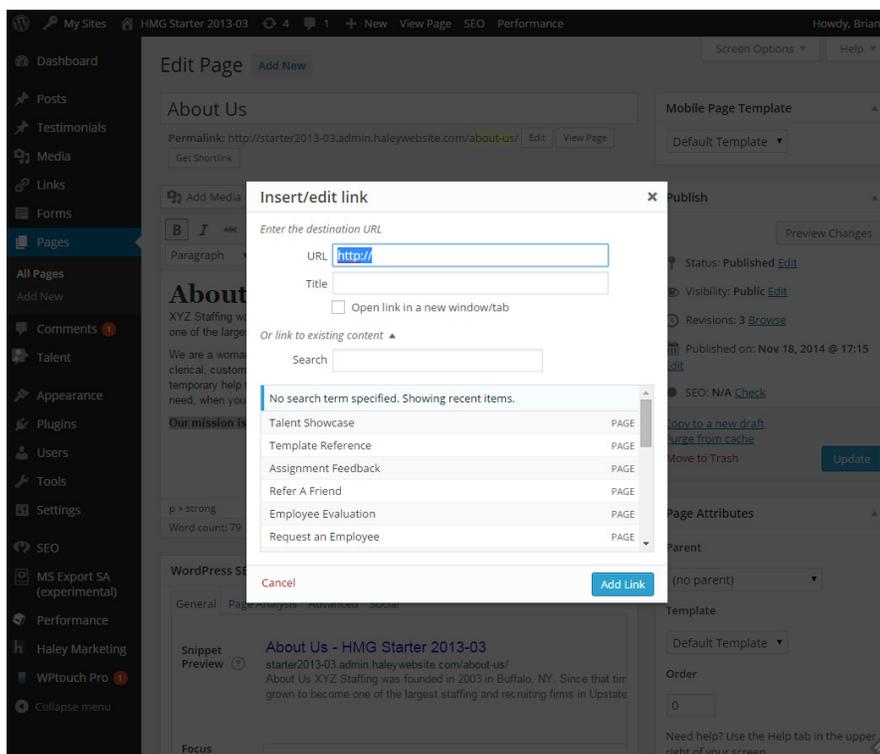
You can select an image or file from your computer, a URL, or use one already uploaded into your Media Library. Once the image is uploaded, you can change alignment, dimension and other image attributes using the advanced editing mode.

Taking Your Site Live

Once your site has been set up to your liking, you can take the site live. There are two parts to this process: (1) pointing your domain (URL) at the new site, and (2) Notifying Haley Marketing Group so we can update the configuration on our server to route your domain to the site.

Pointing your domain (URL) at the new site

You will need to update your domain's DNS settings to point the A record for your website to the IP address of the Haley Marketing Group servers where your new site is hosted. The IP Address that you will point to is **50.57.203.223.**

To explain, your DNS record is responsible for translating your domain name into numerical IP addresses, so that a browser can connect with the real physical address of your website. DNS is the Internet's address book, and it's essential for the online availability of your website. If the DNS records are not set correctly, your domain name will not be pointed to your website files and your website will subsequently be unavailable.

Under most situations, the DNS record is controlled by your domain registrar (i.e., the company with whom you registered your company's domain name). You will need to contact your DNS provider, or login to your account, to change the "A record" to point to the IP: **50.57.203.223.**

If you have the account information for your DNS provider, you may choose to allow Haley Marketing Group to make this change on your behalf. If you would like to do so, please send the DNS provider's URL, username, password, and domain name to support@haleymarketing.com.

Advanced Topics

Adding a New Website Page

You may add new subpages (pages that do not appear in your main navigation) to your site. Note that using the Add New Page feature to add a main level navigation may cause design elements to break. Please contact support@haleymarketing.com to add pages to the top level of your site.

- From the main navigation, select **Pages>Add New**. You will be directed to the **Add New Page**.

- Enter the name (title) for your new page in the **Enter Title Here** box. Try to keep your page title to approximately one to three words. The page title will determine the name of your page for the page headline, as well as your site navigation. Titles that are too long can "break" certain design elements on your site.

- Once you have determined the page title, move on to the main body area of the page. Here, you can add and format copy and images (See the *Basic Page Formatting in WordPress* section.)

- On the right side of the **Add New Page**, you will find a box unique to the Pages section of WordPress. **Page Attributes** will determine the placement and design of your new page.

  You should only be adding new subpages (pages that do not appear in your main navigation) to your site. For new subpages, select the main page that will house your new page. For example, if you want to add a Testimonials page, the parent page could be your About Us page. WordPress pages are built on design templates which establishes the specific design used. Please note, you should select the "Subpage Template – 1 column" or Subpage Template – 2 column" for your new pages.
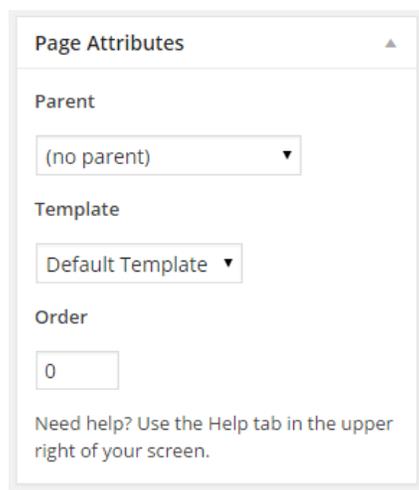
Updating the phone number in the top bar

Various widgets are used to control the "theme" areas of the site.

- Select **Appearance** then **Widgets** from the main navigation.
- Select **Top Bar** (top right) and press the down arrow to open.
- Press the down arrow next to the Text widget to open.
- Update the phone number.
- Press the Save button.

Updating the Social Media links in the top bar

Access via the WordPress Admin Menu: Appearance then Widgets
Then select: Social Media Links (top right) and press the down arrow to open the Text area

- You will see the code for the links as an unordered list in HTML. If you are not familiar with HTML, we strongly suggest you have HMG make the changes on your behalf.
- If you choose to change the HTML, please copy and paste the existing code into a document on your computer first. This way, if you make a mistake, it can be easily set back to the original.
- To change the link, copy and paste the full URL of your social media page where the # is. The URL must be inside the quotation marks.

  For example:
  Linked In

  Becomes:
  <a href="**http://www.linkedin.com/company/haley-marketing-group target="_blank**"
  class="linkedin">Linked In

You may choose to comment out the code instead of deleting the links that you do not want to display. To do this surround the code with <!--START COMMENT and END COMMENT-->.

For example, to not display the YouTube and Pinterest icons,:
<!--START COMMENT
You Tube
Pinterest
END COMMENT-->

Updating the company address in the footer

Various widgets are used to control the "theme" areas of the site.

- Select **Appearance** then **Widgets** from the main navigation.
- Select **Company Address** (middle right) and press the down arrow to open.
- Press the down arrow next to the Text widget to open.
- Update the address.
- You may use the HTML code <br /> to force line breaks.
- Press the Save button.

Updating the contact information in the footer

Various widgets are used to control the "theme" areas of the site.

- Select **Appearance** then **Widgets** from the main navigation.
- Select **Contact Information** (middle right) and press the down arrow to open.
- Press the down arrow next to the Text widget to open.
- Update the phone and fax numbers, without changing the HTML tags that are present.
- We do not recommend changing the email address. This is setup to link to the contact form, instead of displaying an email address which could be used by spammers..
- Press the Save button.

Updating the banner images on top-level pages

Banner images on top level pages can be changed by updating the Featured Image.

- Select **Pages** from the main navigation. You will be directed to a page that contains a full listing of all the pages available on your site (if your site has a large number of pages, you may have to move to the next page to see the remaining items on the list).
- Hover over the page title to view editing options, or click on the page title to be taken to the **Edit Page**.
- In the bottom right area of the window, you will see the Featured Image which is used as the banner image on that page and all sub-pages. Click on the image to edit. Refer to the "*Inserting/Editing Images & Media'* section above for instructions.

Managing the rotating banner on the homepage

Access via the WordPress Admin Menu: SlideDeck 2

- Allows you to load images and adjust the text on each slide.
- Also allows some styling changes.
- Images are auto-resized.
- Drag to reorder slides, x to delete, and add new slides.
- Text overlay is the title of the image.

Advanced Option (we do not recommend that you make these changes).

- Change text styles of overlay (one style for all images).
- Slide controls.
- Link slides (which is controlled in the image after the option is enabled).
- Create multiple slide decks and insert onto pages.

Search Engine Optimization (SEO)

While full SEO services are not included with the basic State Association website, we do provide you with an easy tool to optimize each of your pages and posts for search engines. The All-in-One SEO Pack is available on the Edit Pages. To use it, just enter the following on each page you want to optimize:

- *Title*
  The page title is displayed in the tab or the title bar of your browser, depending on the browser being used. Make sure to use relevant keywords in your title.

- *Description*
  The post/page description will appear when your page or post displays in search results. It tells the user what the post is about. Include relevant keywords in the description text when possible.

- *Keywords*
  This is a list of keywords that is automatically populated in the meta-data of the post and helps the search engine "categorize" your page. We recommend using your post "tags" as keywords and including four to eight keywords/tags per post.

Please note that Haley Marketing offers additional SEO services for your site. If you would like more information, please contact us at support@haleymarketing.com.

Adding SEO links to the footer

Various widgets are used to control the "theme" areas of the site.

- Select **Appearance** then **Widgets** from the main navigation.
- Select **Quick Links** (bottom right) and press the down arrow to open.
- Press the down arrow next to the Text widget to open.
- You will see the code for the links as an unordered list in HTML. If you are not familiar with HTML, we strongly suggest you have HMG make the changes on your behalf.
- By default the SEO Links are commented out. To use these, you must remove the comment tags. Delete these two lines:
  <!--START COMMENT
  END COMMENT-->
- For each SEO link, replace the pound sign (#).with the page URL retaining the quotation marks. Then, replace the words SEO/Quick Link with keyword rich text.
- Press the Save button.

Appendix A: Plug-ins Used on the Site

The following WordPress plug-ins are used in the State Association site. These plug-ins are either licensed to Haley Marketing Group, or where necessary, licensed to the state association on set up of the site. Links to the plug-in website are provided to allow you to gain more information.

- **Slidedeck -** http://www.slidedeck.com/
  JavaScript photo gallery with customizable styles and editable text.

Contact Form 7 - http://contactform7.com/
Contact form generator.