

User Guide

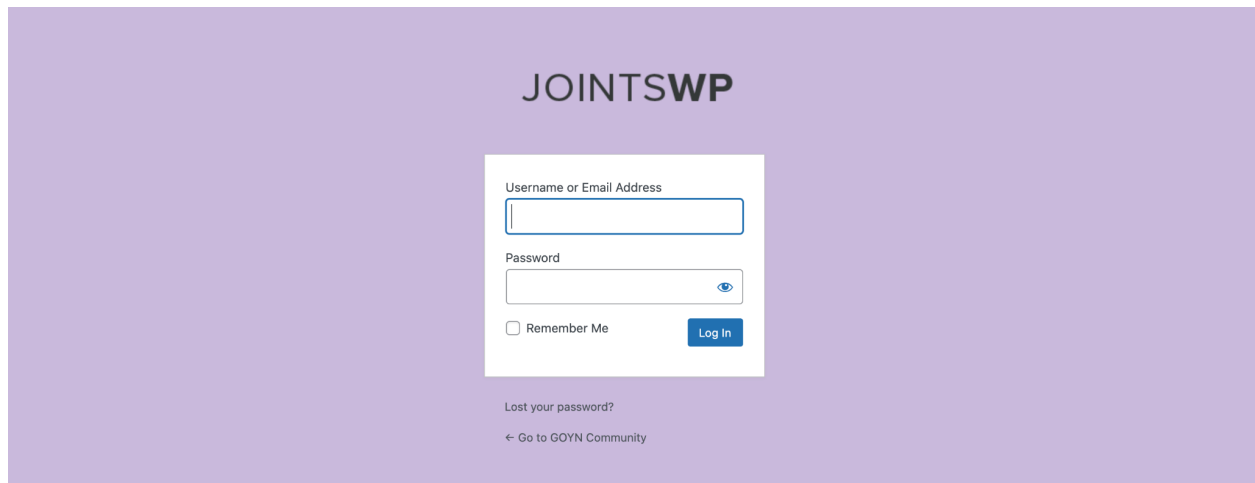
GOYN Community Template

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Logging In

Before you can make any changes to your site, you will need to log in. The login for your site is typically found at the following URL – *http://your-wordpress-site.com/wp-admin*. Of course, you'll need to replace *your-wordpress-site.com* with your actual domain name. As an example, we will use ***goyncom.wpengine.com/admin*** in this Guide.



You can log in to your Dashboard using either your Username or your email address associated with your account.

If you do not already have an admin account for the site, you will need another existing admin to set up a user on your behalf. If you are an admin, learn how to add users [here](#).

Navigating the Admin Dashboard

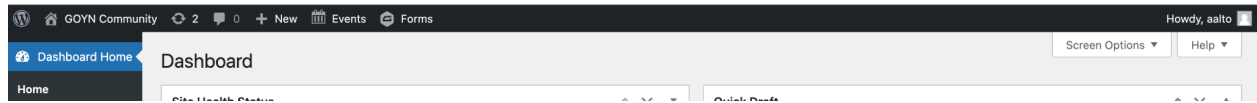
Once you've logged in, you will see your Admin Dashboard. The Dashboard provides some high level information about your site including recent site activity, updates from the WordPress community, and pages recently published on your site.

There are two other important areas of the Admin dashboard where you can navigate to edit and add content on your site:

WordPress Toolbar

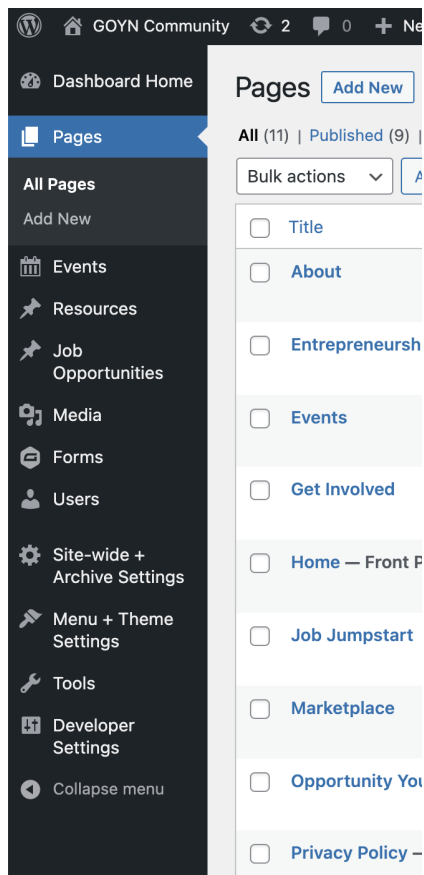
At the very top of your Dashboard, you will see a “toolbar” with a few helpful quicklinks. In the example screenshot below (and throughout this documentation) the site name is *GOYN Community*.

On the right side of the Toolbar, you will also see the name of the person who is currently logged in (where it says “Howdy, aalto” in the example below). Move your cursor over your name to reveal the *Log Out* link as well as a link to edit your user profile.



When you are logged into your WordPress dashboard and you visit your website, you will see the Toolbar running across the **top** of your site. This bar only appears if you are currently logged into your WordPress site, which means that it won't be visible to your everyday site visitors. If you are not logged in, the Toolbar won't be displayed.

Left-side Admin Menu



Down the left-hand side of the Dashboard, you will see your main admin navigation menu. This is where you'll find all the options to update and configure your site.

Hovering your cursor over each of the main menu options will display a 'fly-out' menu with the various choices for that menu option. Once you click each of the main menu options, that menu will expand to show all the available options within that section (if there are any).

The GOYN Community Template's Dashboard Menu Options include:

- **Dashboard Home**
- **Pages**
- **Events**
- **Resources**
- **Job Opportunities**
- **Media**
- **Forms**
- **Users**
- **Site-wide + Archive Settings**
- **Menu + Theme Settings**
- **Tools**
- **Developer Settings**

At the bottom of the menu you'll see a link called *Collapse menu*. Clicking this will hide the menu and simply display their icons instead. Click the small arrow icon again to expand the menu.

Adding Content to your Site

Every word and image on the GOYN Community Template is editable, though you will need to understand a few basics of WordPress in order to find where/how to edit that content.

Posts, Pages, and Archives

WordPress is built around two basic concepts: **Posts and Pages**. The main difference is that Posts allow you to associate [Categories](#) and [Tags](#) whereas Pages don't.

Additionally, Posts are meant for more timely content, such as Events or Resources that at some point will “expire” or need to be updated. Pages are used for more static content (i.e. content that doesn't change or changes infrequently, timeless). An 'About us' page is an example of a Page on a typical website. In most cases, you'll find that the content in the 'About us' page doesn't change all that frequently.

Archives are similar to Pages, but they're a specific type of Page that automatically pulls in a collection of Posts. For example, a “Calendar” is technically an Archive because it is a collection of Event Posts.

The GOYN Community Template has several Post types available (each type has a different design based on the content requirements):

- Events
- Resources
- Job Opportunities

The Template also has several Page templates available (some are more flexible than others):

- Home (not flexible, designed for specific sections based on design specifications)
- About (not flexible, designed for specific sections based on design specifications)
- Get Involved (not flexible, designed for specific sections based on design specifications)
- Page with Header (very flexible, leverages the page builder with a number of designed blocks that can be used)
- Default Template (very flexible, leverages the page builder with a number of designed blocks that can be used)

☐	Title	Author	Status	Date
☐	About	aalto	Published	2021/07/22 at 8:13 pm
☐	Account — UM Account	aalto	Published	2021/08/11 at 5:42 pm
☐	Entrepreneurship Hub	aalto	Published	2021/09/08 at 8:52 pm
☐	Events	aalto	Published	2021/08/13 at 5:15 pm
☐	Get Involved	aalto	Published	2021/08/13 at 2:28 am
☐	Home — Front Page	aalto	Published	2021/07/20 at 3:22 am
☐	Job Jumpstart	aalto	Published	2021/09/08 at 8:51 pm
☐	Login — UM Login	aalto	Published	2021/08/11 at 5:42 pm
☐	Logout — UM Logout	aalto	Published	2021/08/11 at 5:42 pm
☐	Marketplace	aalto	Published	2021/09/08 at 8:52 pm
☐	Members — UM Members	aalto	Published	2021/08/11 at 5:42 pm
☐	Notifications	aalto	Published	2021/08/11 at 8:12 pm
☐	Opportunity Youth	aalto	Published	2021/09/08 at 8:51 pm

The above screenshot is shown for Pages but is very similar in transactions regarding the different Post types (events, resources, and job opportunities).

At the top of the page you can view how many Pages in total you have in your site, how many have been published by yourself or how many are Published or in Draft. When hovering your cursor over each row, a few links will appear beneath the Page title.

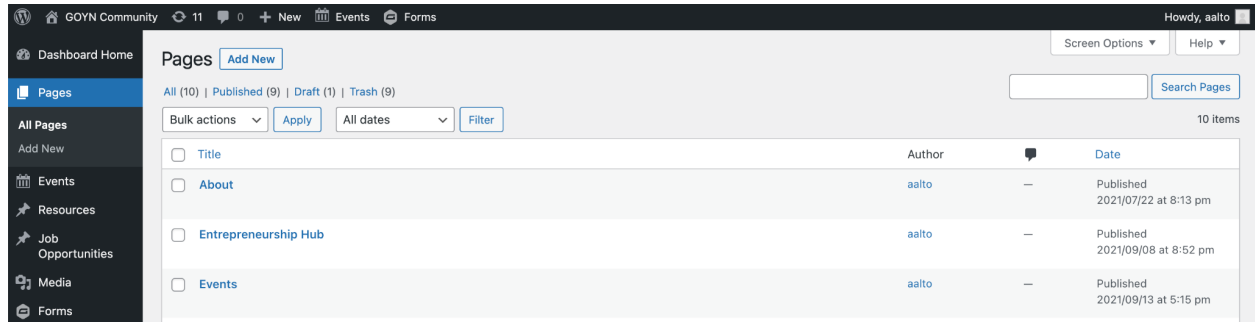
- **Edit** – Will allow you to edit your Page. This is the same as clicking on the Page title
- **Quick Edit** – Allows you to edit basic Page information such as Title, Slug, Date plus a few other options
- **Trash** – Will send the Page to the Trash. Once the Trash is emptied, the page is deleted
- **View** – Displays the Page. If the Page hasn't been published yet, this will say *Preview*

Next to each Page title is a checkbox. This allows you to perform an action on multiple items at once. You simply check the Pages that you would like to affect and then from the Bulk Actions dropdown select either the *Edit* option or the *Move to Trash* option and then click the *Apply* button. The *Edit* option will allow you to edit the Author, Parent, Template, whether to allow Comments or not and the Status of each of the checked items. The *Move to Trash* option will move the selected items to the Trash.

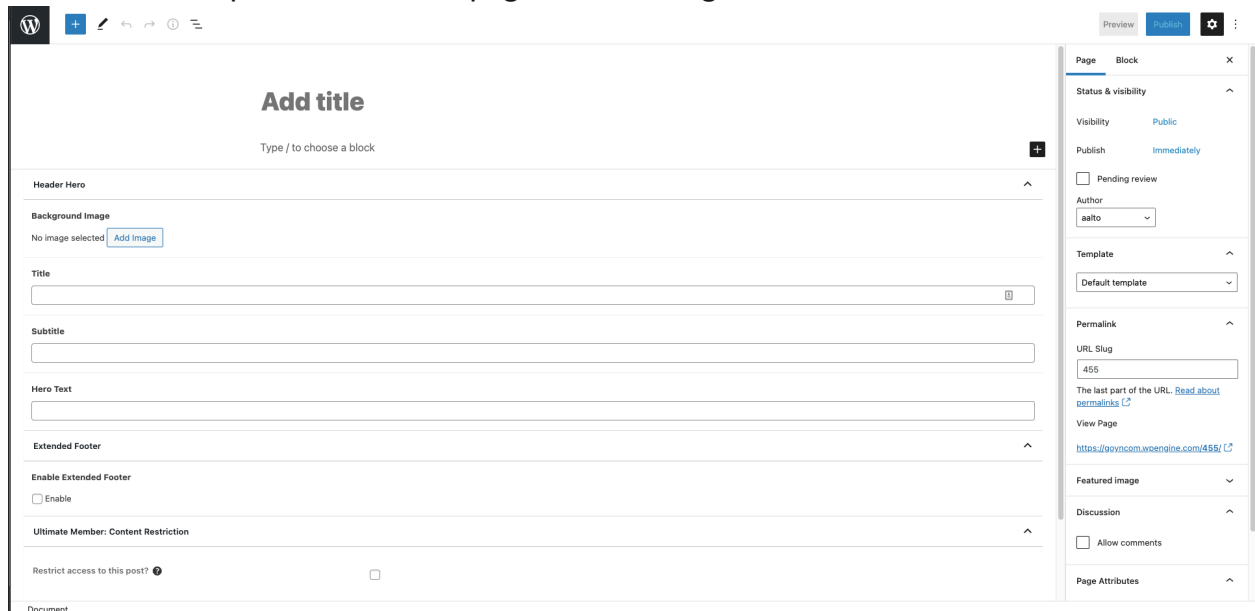
You can also filter the pages that are displayed using the dropdown list and the *Filter* button.

Adding a New Page

To add a new Page, hover your cursor over the *Pages* menu option in the left-hand navigation menu and in the fly-out menu, click the *Add New* link. Alternatively, click the *Pages* menu option and then click the *Add New* link underneath, or the *Add New* button at the top of the page.

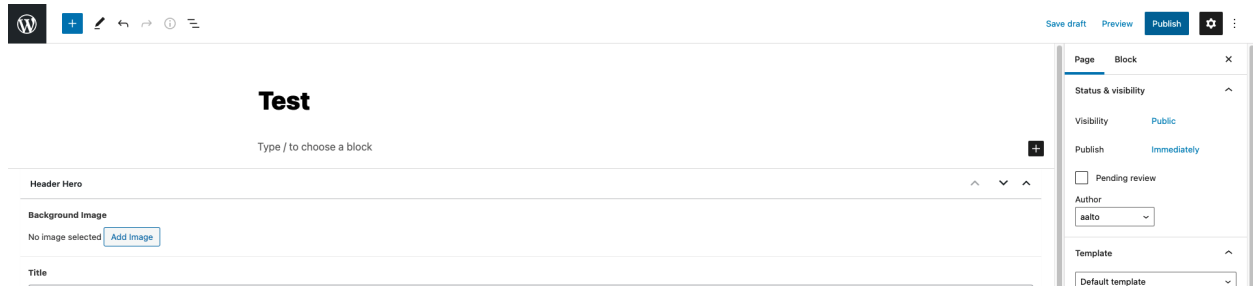


You will then be presented with a page like the image below:



The first step in creating a new page is to choose the template you want to use.

Once you've added all your content to your Page or Post you have the option of Saving the Page as a Draft or Publishing the page. Clicking the *Save Draft* button will simply save your Page/Post. This is handy if you would like to come back at a later date to add more content or if you're simply not ready to publish yet.



Clicking the *Publish* button will save your Page/Post and publish it on your website.

Clicking the *Preview* button will show you a preview of the current Page/Post.

There are also several options available when saving. By default, the *Status* is set to Draft but this can be changed by clicking the *Edit* link just to the right of *Status*: within the *Publish* panel.

- **Pending Review** means the draft is waiting for review by an editor prior to publication.
- **Draft** means the post has not been published and remains a draft for you.

You can also change the visibility of the Page by clicking the *Edit* link just to the right of *Visibility*: within the *Publish* panel.

- **Public** is the default and means the page is viewable to all. There is also an option to make the Post 'sticky'. Sticky posts are placed at the top of all blog posts and stay there even after new posts are published.
- **Password Protected** allows you to assign a password to your page. Only people who have the password will be able to access the page.
- **Private** hides the content from the public completely. Normal users and visitors will not be aware of private content. You will only see the private content when you are logged into your WordPress blog.

Just below the Title for your content is the full URL for your Page or Post. Clicking this will take you to the published page, or if the page hasn't been published yet, a preview of the page. Clicking the *Edit* button next to the URL allows you to change the Permalink (i.e. the URL) of the Page or Post. You might decide to do this for improving SEO (Search Engine Optimization). Most times though, you'll simply leave the default URL which WordPress automatically generates based on your Page/Post Title.

By default, when you click the *Publish* button your Page/Post is published immediately. To change this, click the *Edit* link just to the right of *Publish immediately* within the *Publish* panel. You can then select the date and time that you'd like to schedule your Page/Post to be published. You must also click the *Publish* button when you have updated the date and time fields to publish at the desired date and time.

Adding a New Event

To add a new Event, hover over the *Events* menu option in the left-hand navigation menu and in the fly-out menu, click the *Add New* link. Alternatively, click the *Events* menu option and then click the *Add New* link underneath, or the *Add New* button at the top of the page. You will be presented with a page like the image below

The screenshot shows the 'Add New Event' form in the GOYN Community dashboard. The left-hand navigation menu is open, showing options like Dashboard Home, Pages, Events, Add New, Tags, Event Categories, Venues, Organizers, Import, Settings, Help, Troubleshooting, Event Add-Ons, Resources, Job Opportunities, Media, Forms, Users, Site-wide + Archive Settings, Menu + Theme Settings, and Tools. The 'Events' menu is highlighted, and the 'Add New' link is visible. The main content area is titled 'Add New Event' and contains a text input field for 'Add title'. Below the title field are two buttons: 'Add Media' and 'Add Form'. A rich text editor toolbar is visible, showing options for Paragraph, Bold, Italic, Bulleted List, Numbered List, Quote, Indent, Outdent, Link, Unlink, and Table. Below the editor is a 'Word count: 0' indicator. At the bottom, there is a section titled 'The Events Calendar' with a 'TIME & DATE' subsection. This section includes a 'Start/End:' label, two date pickers (both set to 9/17/2021), a time range (8:00am to 5:00pm), and a 'Time Zone: UTC+0' dropdown. There is also an 'All Day Event' checkbox.

Please enter the name of your event in the “Add title” field - this shows up on the Calendar page (or the events “archive page”). You will also need to include a start / end time + date (otherwise it will default to today’s date and time). You can optionally add a location, map, map link, organizer(s), external event website, and event cost. On the right side of the screen, there is a field for “Featured image”. You can add an event image here that will show on both the Calendar and the Event single pages. Add an event description in the “Excerpt” field towards the bottom of the page.

Adding a New Resource

To add a new Resource, hover over the *Resources* menu option in the left-hand navigation menu and in the fly-out menu, click the *Add New* link. Alternatively, click the *Resources* menu option and then click the *Add New* link underneath, or the *Add New* button at the top of the page. You will be presented with a page like the image below.

Resource 1

Description lorem ipsum

External Link

URL
<https://goyn.org/wp-content/uploads/2020/12/GOYN-Bogota-.pdf>

Resources

Location Text
Charlottesville, VA

Location on Map
Charlottesville, VA, USA

Map **Satellite**

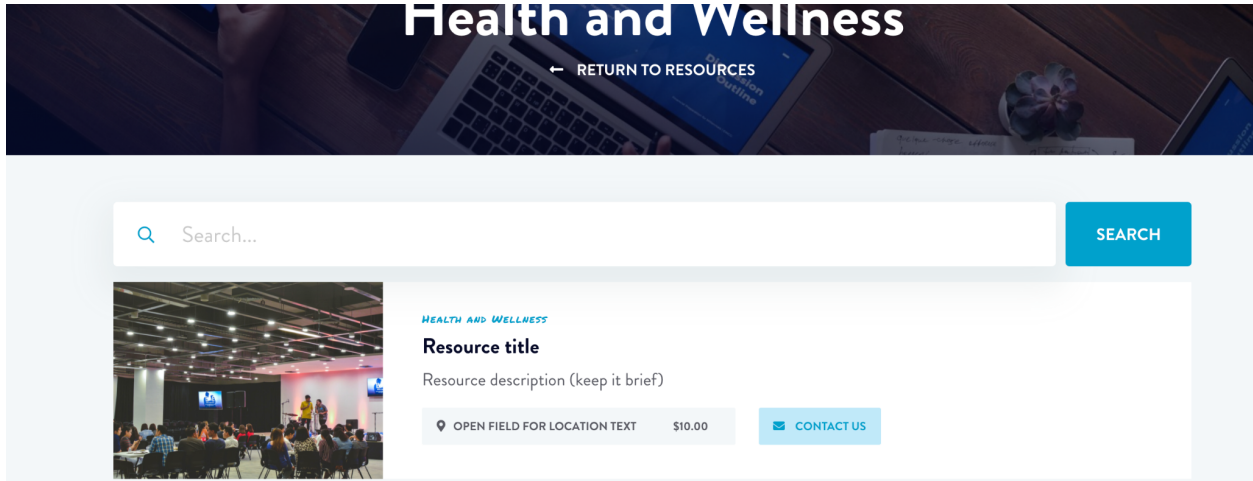
Right Sidebar:

- Resource** **Block** **X**
- Status & visibility** **^**
- Visibility: **Public**
- Publish: September 21, 2021 3:09 pm
- Move to trash**
- Permalink** **^**
- URL Slug: resource-1
- The last part of the URL. [Read about permalinks](#)
- View Resource: <https://goyncom.wordpress.com/resource-1/>
- Resource Categories** **^**
- Add new Resource Category: **Health and Wellness** **X**
- Separate with commas or the Enter key.
- Featured image for this Resource** **^**

Important Resource fields:

- Title (this is the only required field, everything else is optional)
- Brief description (just below the title field, where it says “Type / to choose a block”)
- External Link / URL (link out to the actual resource)
- Location text (this is just an open text field to add in a location name)
- Map address (this will dictate the actual map pin on the Resources map view)
- Cost (leave blank if the resource is free)
- Contact Us Text (leave blank if there is no direct contact)
- Contact Email Address (leave blank if there is no direct contact)
- Resource Category (found on the right side bar)
- Featured Image (found on the right side bar)

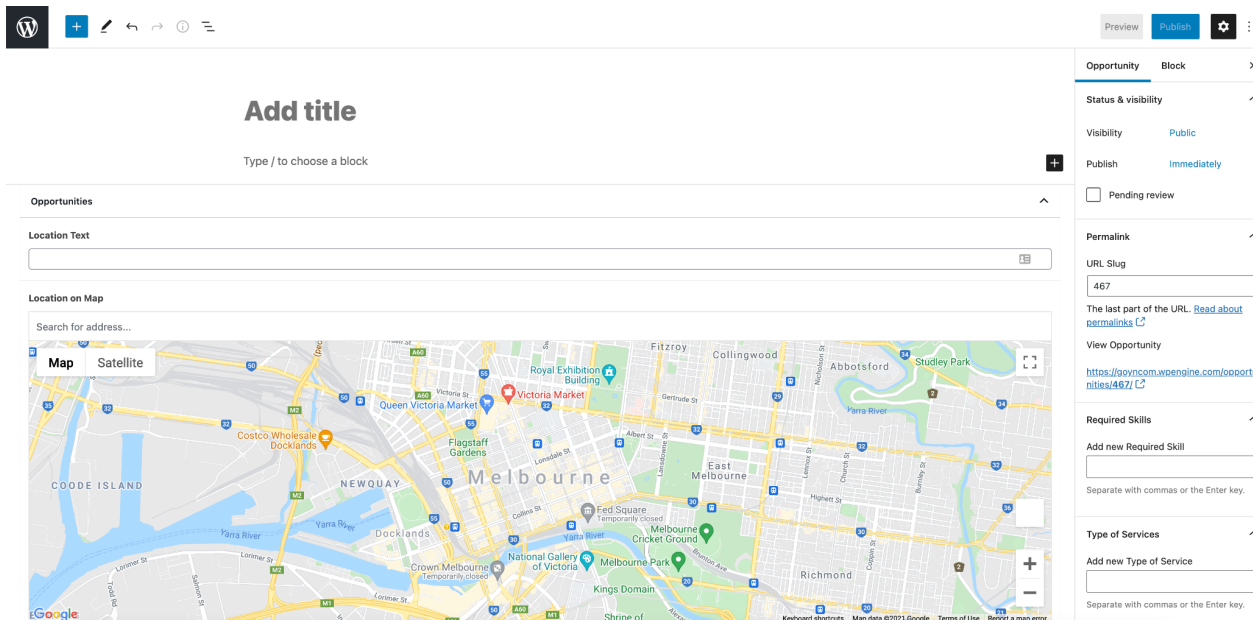
Here’s what a resource card will look like on the actual site if you fill out all of the fields:



Adding a New Job Opportunity

New Job Opportunities will automatically be pulled into the “Job Listings” page (in our sample site: <https://goyncom.wpengine.com/opportunities/>).

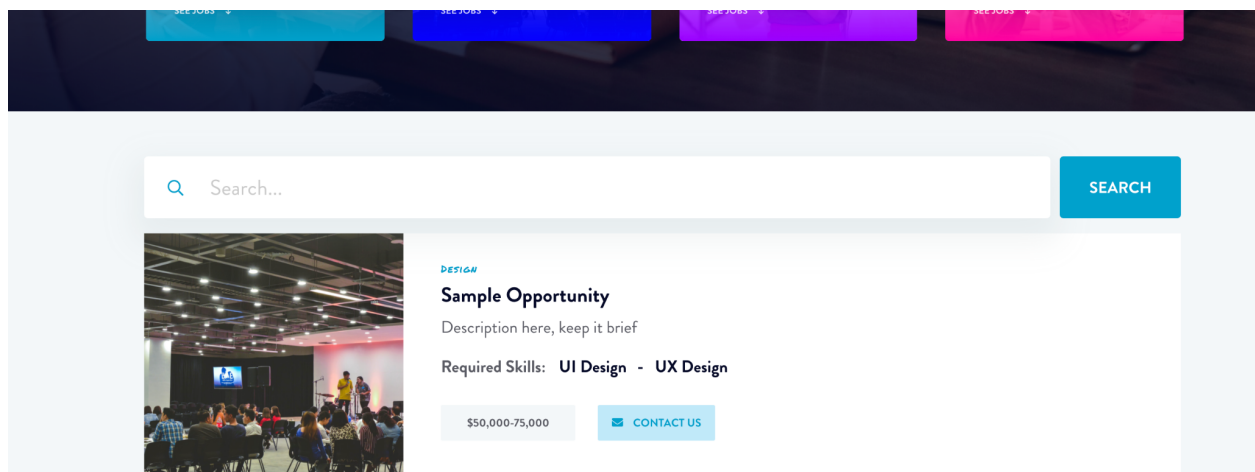
To add a new Job Opportunity, hover over the *Job Opportunities* menu option in the left-hand navigation menu and in the fly-out menu, click the *Add New* link. Alternatively, click the *Job Opportunities* menu option and then click the *Add New* link underneath, or the *Add New* button at the top of the page. You will be presented with a page like the image below.



Important Job Opportunity fields:

- Title (this is the only required field, everything else is optional)
- Brief description (just below the title field, where it says “Type / to choose a block”)
- Location text (this is just an open text field to add in a location name)
- Map address (this will dictate the actual map pin on the Job Opportunities map view)
- Average Pay (leave blank if the resource is free)
- Contact Email Address (leave blank if there is no direct contact)
- Required Skills (ex: “Coding, UX Design”; found on the right side bar)
- Type of Service (ex: “Technology”; found on the right side bar)
- Featured Image (found on the right side bar)

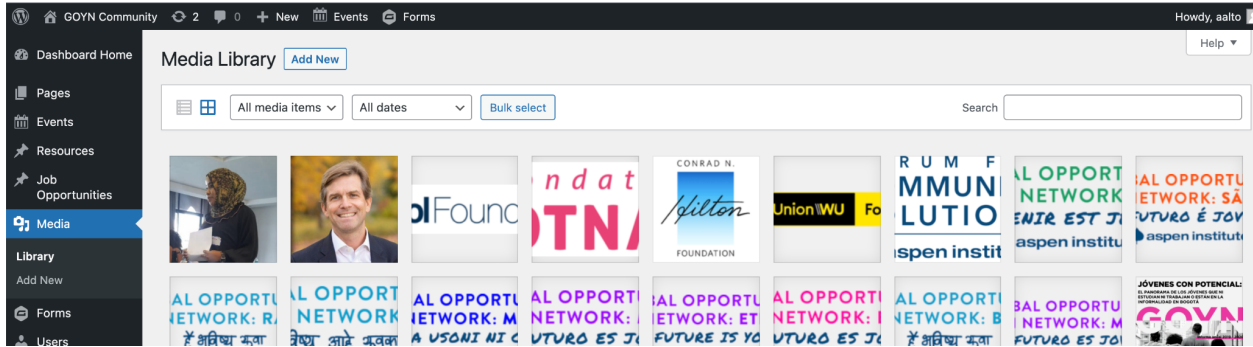
Here’s what a Job Opportunity card will look like on the actual site if you fill out all of the fields:



Adding Images & Other Media

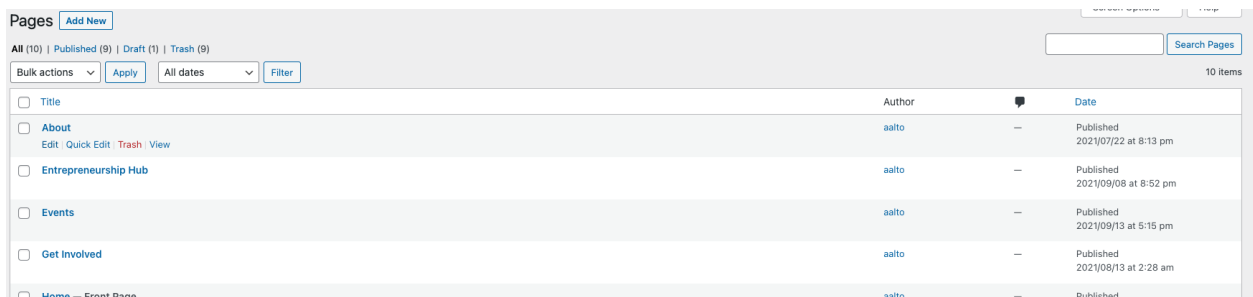
Adding images and other media files such as videos, documents, or PDF's is very easy within WordPress. All of your images and files are stored in the “Media Library”, whether you add them there directly or add them into a Page/Post.

You will be able to access your Media Library on the Dashboard Menu by clicking “Media.” You will then be able to drag and drop your file/image into WordPress in order to use the picture in a Post or Page.



Editing Existing Content

To edit an existing page or post, simply click on the relevant Page/Post title, when viewing your list of Pages or Posts. Alternatively, click on the *Edit* link that appears beneath the title when hovering your cursor over each row.



The screen that appears will be the same as the *Add New Page/Add New Post* screen, only with the existing content displayed. When you've finished editing your Page/Post, click the *Update* button.

IMPORTANT:

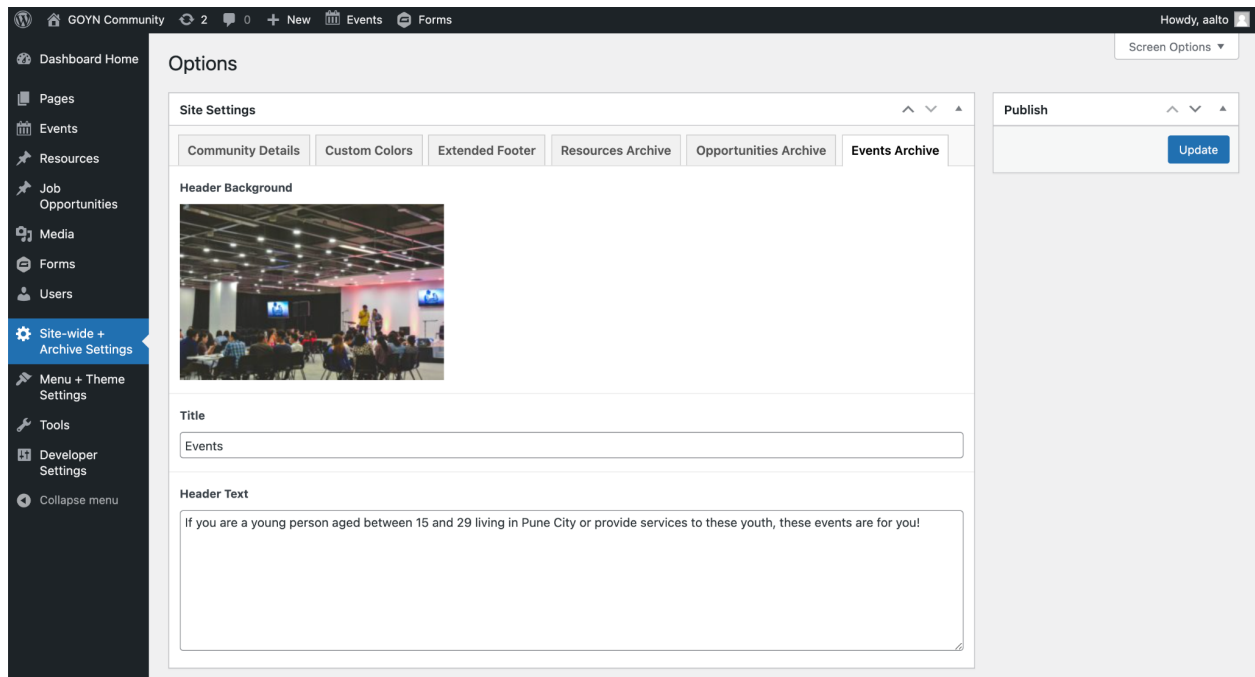
To edit content in site-wide elements (such as the header or footer) or archive pages (for example, the Events Calendar page), go to the "Site-wide + Archive Settings" menu option in the admin. *When in doubt, if you can't figure out how to edit something, check the Site-wide + Archive Settings area of the admin.*

Edit the Events Archive

On our example site: <https://goyncom.wpengine.com/events-home/>

The Events archive page will automatically pull in upcoming event posts, so if you want to edit/delete a specific event, you'll have to go to that specific event post in the admin.

In the admin, go to “Site-wide + Archive Settings”, then choose the “Events Archive” tab.



Here you can edit the:

- Header background image
 - The header background image should work well as a **background** because the title and intro text will be on top of it. There will be a darker overlay automatically applied to any image added, allowing the text to be more readable. Regardless, it is not recommended to use any image with text in it or a very specific focal point that could get cut off when the image is cropped to fit in the area allowed on the page.
 - The ideal image dimensions for this are 1440x440px
- Page title
- Page intro text (“Header Text”)
 - This should be relatively brief, introductory text explaining the purpose of the page

Edit the Resources Archive

On our example site: <https://goyncom.wpengine.com/resources/>

The Resources archive page will automatically pull in resource posts, so if you want to edit/delete a specific resource, you'll have to go to that specific resource post in the admin.

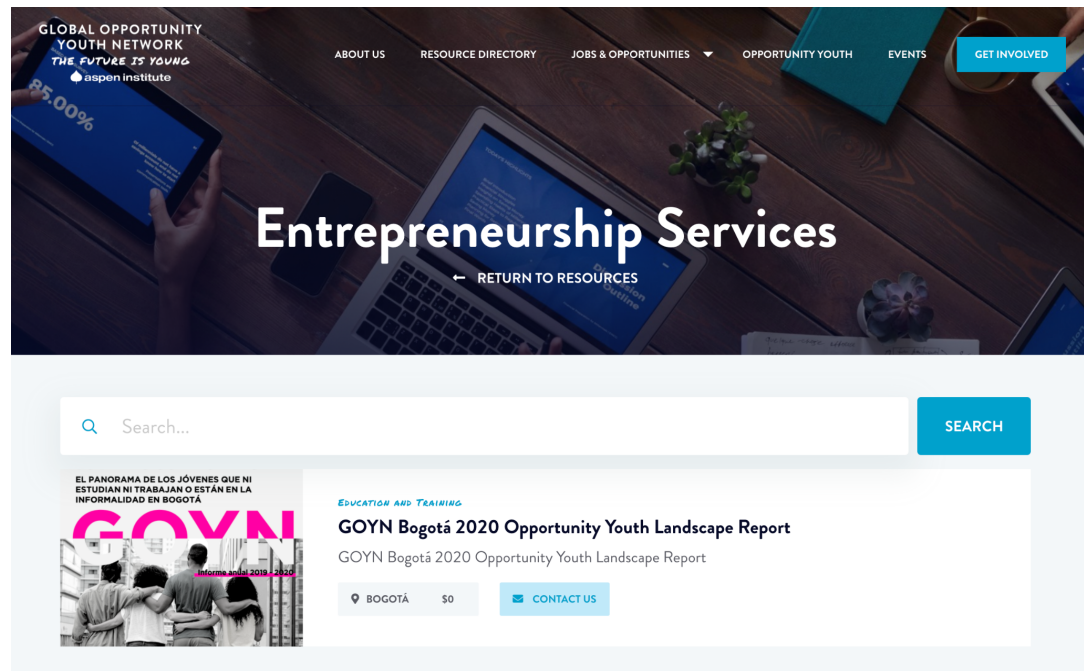
In the admin, go to “Site-wide + Archive Settings”, then choose the “Resources Archive” tab.

The screenshot shows the GOYN Community dashboard. On the left is a dark sidebar with navigation links: Dashboard Home, Pages, Events, Resources, Job Opportunities, Media, Forms, Users, Site-wide + Archive Settings (highlighted), Menu + Theme Settings, Tools, Developer Settings, and Collapse menu. The main content area is titled 'Options' and has a sub-header 'Site Settings'. Below this are tabs: Community Details, Custom Colors, Extended Footer, Resources Archive (selected), Opportunities Archive, and Events Archive. The 'Resources Archive' tab is active, showing a 'Header Background' section with a placeholder image of people working on laptops. Below the image is a 'Title' field containing 'Resource Directory'. Underneath is a 'Header Text' field with the text: 'If you are a young person aged between 15 and 29 living in Pune City or provide services to these youth, this directory is for you!'. Below that is a 'Breadcrumb Text' field containing 'Return to Resources'. At the bottom is a checkbox for 'Enable Resource Categories'. On the right side of the 'Options' panel, there is a 'Publish' button and an 'Update' button. The top right of the dashboard shows the user 'Howdy, aalto' and a 'Screen Options' dropdown.

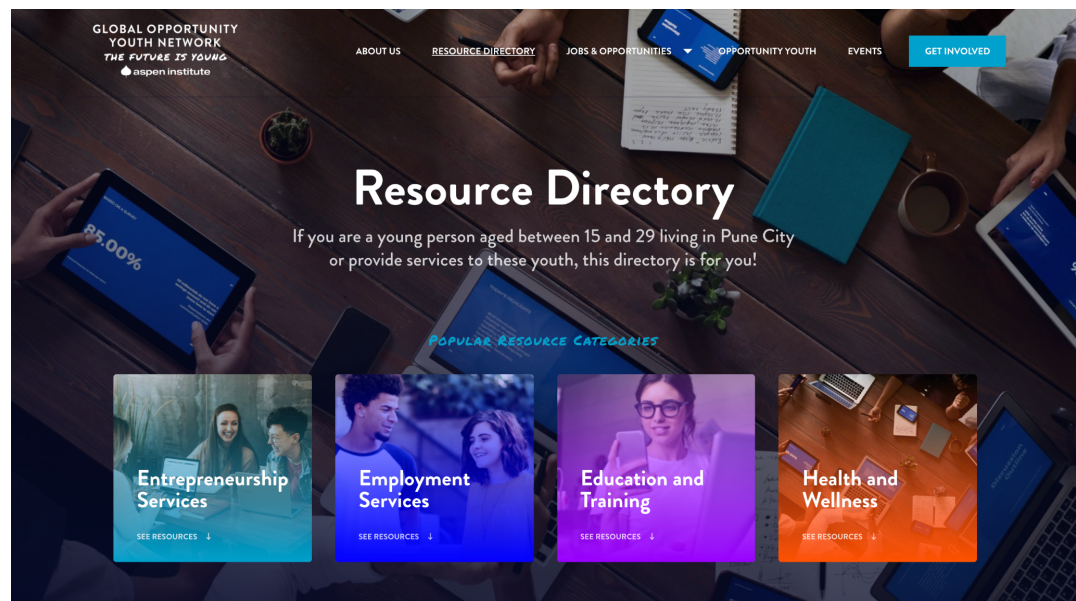
Here you can edit the:

- Header background image
 - The header background image should work well as a **background** because the title and intro text will be on top of it. There will be a darker overlay automatically applied to any image added, allowing the text to be more readable. Regardless, it is not recommended to use any image with text in it or a very specific focal point that could get cut off when the image is cropped to fit in the area allowed on the page.
 - The ideal image dimensions for this are 1440x440px
 - Page title
 - Page intro text ("Header Text")
 - This should be relatively brief, introductory text explaining the purpose of the page
 - Breadcrumb Text
 - By default this will say "Return to Resources"
 - This text will show up if a user clicks on a specific category, for example "Entrepreneurship Services"
- [\(https://goyncom.wpengine.com/resource_category/entrepreneurship/\)](https://goyncom.wpengine.com/resource_category/entrepreneurship/)

- It will show up just below the category title and allow the user to easily get back to the Resources Archive to browse all resources and categories.

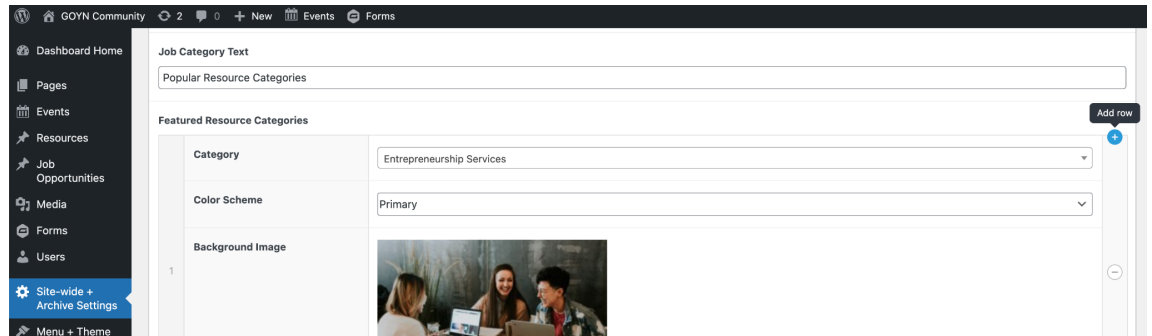


- Enable or disable the resource categories
 - If you enable the categories, users will see four featured categories at the top of the Resource archive page:

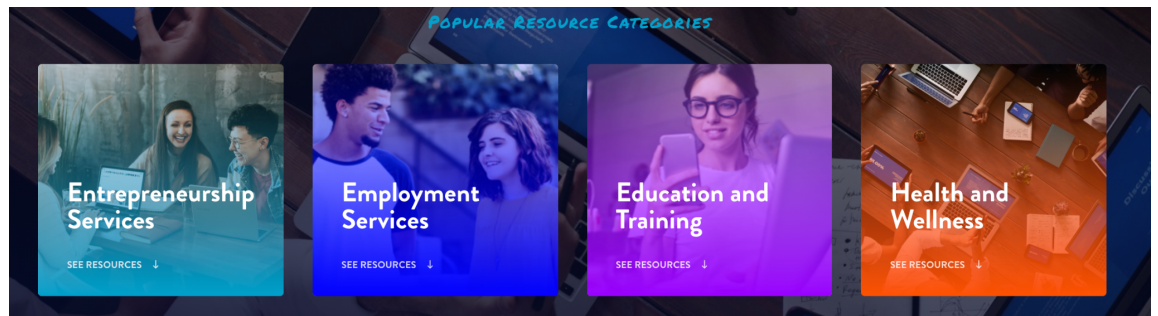


- Disable categories if you want to make the page shorter or don't have enough categories to feature
- Job Category Text
 - By default, this will say "Popular Resource Categories" in blue just above the four featured categories.

- Featured Resource Categories
 - The ideal number of featured categories is four, although you are able to have any number of categories. To add or delete categories, you can hover over the right side and choose the “+” or “-” options to add or remove



- You can also drag and drop the order of featured categories by hovering over the number on the left
- See Resources Text
 - On the featured resource category boxes, by default it says “SEE RESOURCES” underneath the category title, though this is editable here. It does use the same text across all featured category boxes.



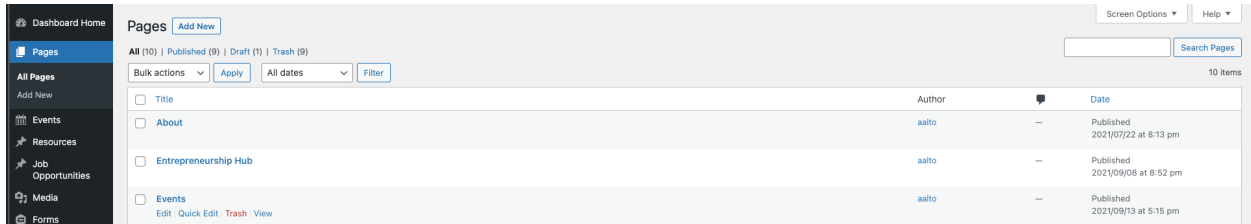
Edit the Job Opportunities Archive

On our example site: <https://goyncom.wpengine.com/opportunities/>

The Job Opportunities archive page will automatically pull in job opportunity posts, so if you want to edit/delete a specific job opportunity, you'll have to go to that specific job opportunity post in the admin.

Deleting Content

If you wish to delete one of your Pages or Posts, click on the *Trash* link that appears beneath the title when hovering your cursor over each row. This will move the Page/Post to the Trash.



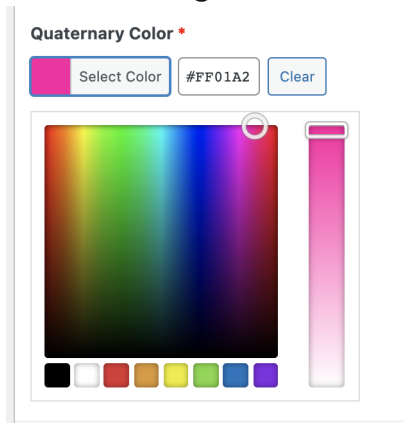
To delete the Page/Post permanently or to restore the Page/Post, click the *Trash* link at the top of the screen. When the cursor is hovering over each item in the Trash, the *Restore* and *Delete Permanently* links appear. Click *Delete Permanently* to permanently remove a single Page or Post. Clicking *Restore* will restore the Page or Post.

Site-wide + Archive Settings

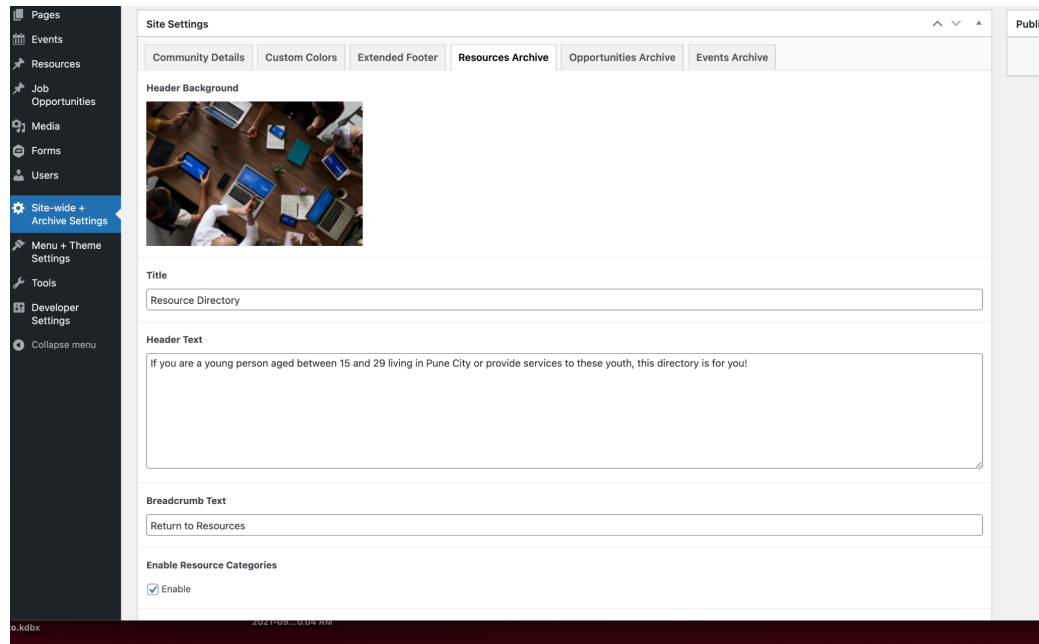
As mentioned earlier, when in doubt, if you can't figure out how to edit something, check the Site-wide + Archive Settings area of the admin.

Site-wide settings include the site logo, primary and secondary colors, optional extended footer, resources archive, opportunities archive, and events archive. Site logo, colors and extended footer affect these areas across the site.

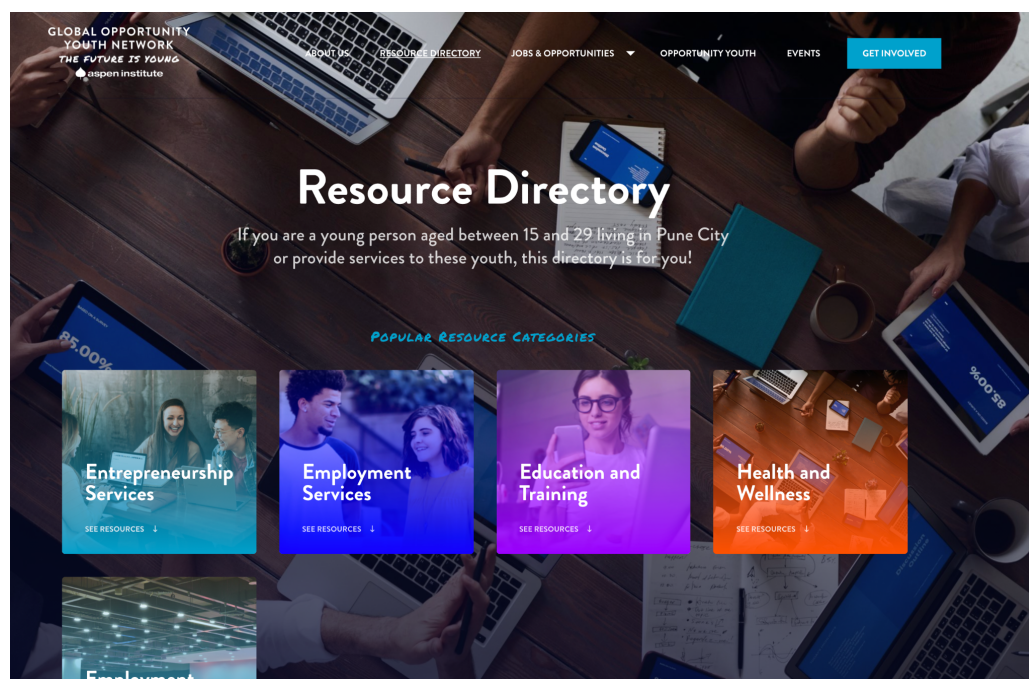
Selecting primary, secondary, tertiary, quaternary, quinary, and senary colors can be done by clicking 'Select Color' and dragging the circle to any color within the color palette area. Darkness or lightness can be adjusted within the selection area to the right.



The **Resources Archive** affects the 'Resources Directory' page (see second screenshot below). Header background image, resource category and all text and content within this page can be edited here. Click 'Update' in the top right corner to Publish any changes.



The screenshot shows the 'Site Settings' interface for the 'Resources Archive'. On the left is a dark sidebar with a menu including Pages, Events, Resources, Job Opportunities, Media, Forms, Users, Site-wide + Archive Settings (highlighted), Menu + Theme Settings, Tools, Developer Settings, and Collapse menu. The main content area has tabs for Community Details, Custom Colors, Extended Footer, Resources Archive (selected), Opportunities Archive, and Events Archive. The 'Resources Archive' tab is active, showing a 'Header Background' image of people at a table, a 'Title' field with 'Resource Directory', a 'Header Text' field with a paragraph about youth services, a 'Breadcrumb Text' field with 'Return to Resources', and an 'Enable Resource Categories' checkbox which is checked. A 'Publish' button is in the top right corner.



The **Opportunities Archive** affects the 'Job Opportunities' page (see second screenshot below). Header background image and all text and content within this page can be edited here. Click 'Update' in the top right corner to Publish any changes.

Site Settings

Community DetailsCustom ColorsExtended FooterResources Archive**Opportunities Archive**Events Archive

Header Background

Title

Job Opportunities

Header Text

Explore job vacancies in your area

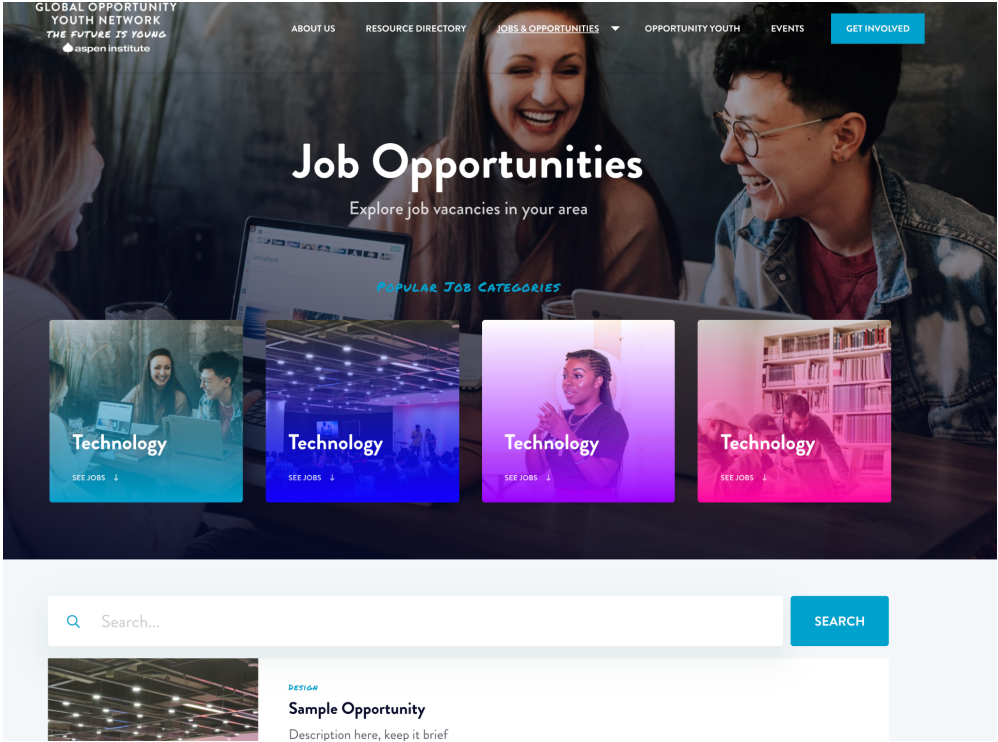
Breadcrumb Text

Return to Opportunities

Enable Opportunity Categories

☒ Enable

Job Category Text



The **Events Archive** affects the ‘Events’ page (see second screenshot below). Header background image, event text and content within this page can be edited here. Click

'Update' in the top right corner to Publish any changes.

Pages

Events

Resources

Job Opportunities

Media

Forms

Users

Site-wide + Archive Settings

Menu + Theme Settings

Tools

Developer Settings

Collapse menu

Site Settings

Community DetailsCustom ColorsExtended FooterResources ArchiveOpportunities ArchiveEvents Archive

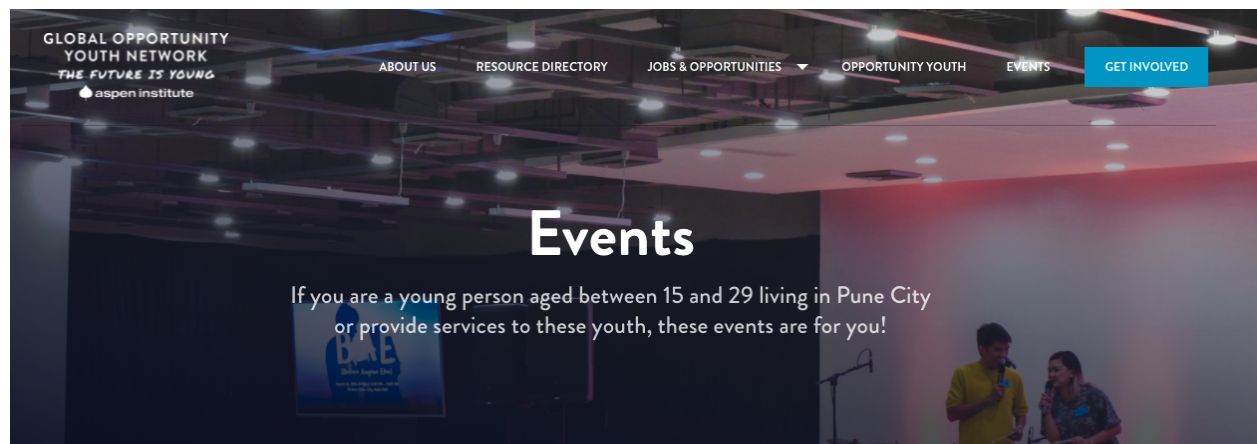
Header Background

Title

Events

Header Text

If you are a young person aged between 15 and 29 living in Pune City or provide services to these youth, these events are for you!



« All Events

Menu + Theme Settings

The various Appearance menus allow you to change how your site looks and behaves. Generally this area of the site should only be edited by software developers. The site

theme, widgets and menu area can have drastic effects to the site and should work out of the box. The theme editor includes software development code that affects the entire site and should be edited with extreme caution by experienced software developers if need-be.

Plugins

Plugins extend and expand the functionality of WordPress. Once a plugin is installed, you may activate it or deactivate it here. There are thousands of plugins available that provide a huge range of functionality. The easiest place to find them is within the official WordPress [Plugin Directory](#). You can search and install new plugins by clicking on the *Add New* button at the top of the page or the *Add New* link in the left-hand navigation menu.

Once a plugin has been added to your site, it needs to be 'turned on.' To do this, click the *Activate* link to activate it. Depending on the plugin, you might also find that there are settings that need to be configured.

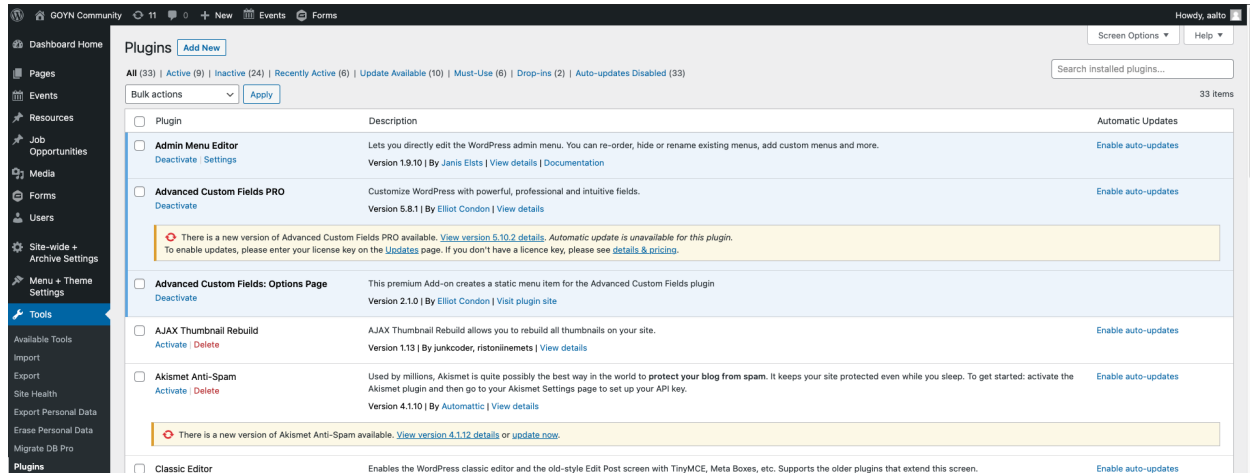
Activated plugins will be displayed with a different colored background within your list of plugins. They will also be highlighted with a blue vertical bar down the left side of the row.

If any of your installed plugins have available updates, a small number will appear next to the *Plugins* menu option. The number will advise you as to how many plugins have updates available. A message will also be displayed just below the plugin name and description, advising that it has an update, along with a link that allows you to view the details for the new version and another link for updating the plugin.

Prior to updating a plugin, it's wise to verify that the plugin functionality hasn't changed significantly as to adversely affect your site. It's also recommended to check that the plugin and your site still works as expected, once it has been updated.

When you click the *update now* link just below the plugin description, the plugin will automatically update whilst you remain on the *Plugins* page. You will be notified when the plugin has completed updating.

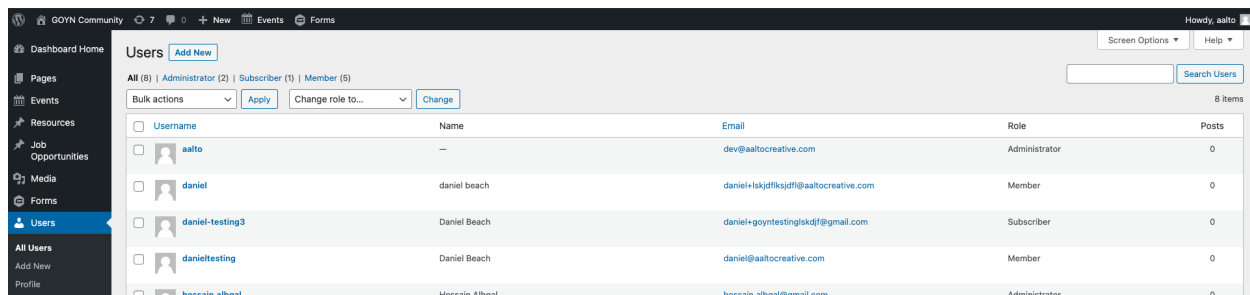
If you have plugins that have been deactivated because you're no longer using them, it's good practice to remove them from your site. You can do this by clicking the *Delete* link underneath the plugin name.



Admin Users

This screen lists all the existing users for your site. Users with roles other than Administrator will see fewer options when they are logged in. Depending on your Role, you can also add new users as well as manage their Roles.

At the top of the screen there are links that allow you to filter the list of Users based on the User Roles. The number in brackets will advise how many there are for that type.

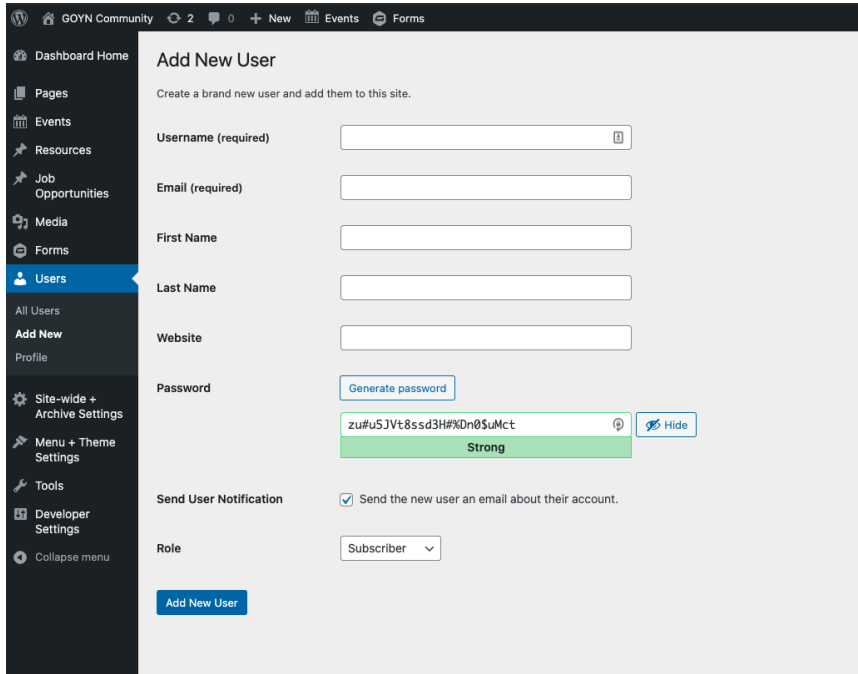


When hovering your cursor over each row in the list of Users, links will appear beneath the user name.

- **Edit** – Allows you to edit the user profile
 - **Delete** – Allows the User to be deleted. This link won't be available for your own profile
- A User can have one of five defined roles as set by the site admin: Site Administrator, Editor, Author, Contributor, or Subscriber.

Adding a New Admin User

To add a new user, click on the *Add New* link in the left-hand navigation menu or the *Add New* button at the top of the page.

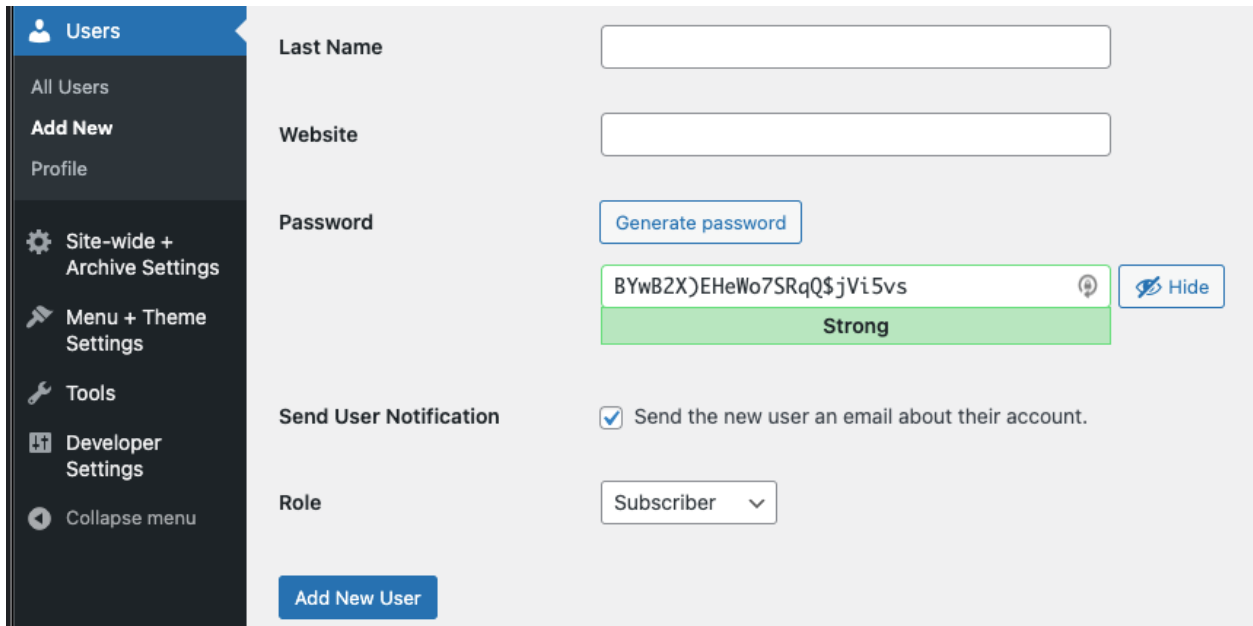
The screenshot shows the 'Add New User' form in a WordPress dashboard. The left-hand navigation menu is visible, with 'Users' selected. The form fields include: 'Username (required)' with a text input and a help icon; 'Email (required)' with a text input; 'First Name' with a text input; 'Last Name' with a text input; 'Website' with a text input; 'Password' with a 'Generate password' button, a text input showing a generated password 'zu#u5JVt8ssd3H#Xdn0\$uMct', a 'Show password' button, and a 'Strong' password strength indicator; 'Send User Notification' with a checked checkbox and the text 'Send the new user an email about their account.'; and 'Role' with a dropdown menu set to 'Subscriber'. An 'Add New User' button is located at the bottom left of the form.

Once the above page is displayed, simply fill in the various fields and click the *Add New User* button.

- **Username** – (mandatory) Enter the username of the new user here. This will also be used as the Login name for the user. Once saved, the Username can't be changed
 - **E-mail** – (mandatory) Enter a valid email address of the new user here. The email address must be unique for each user. If a published Post or Page is authored by this user and approved comments are made to that post or page, a notification email is sent to this email address
 - **First Name** – Enter the first name of the new user here
 - **Last Name** – Enter the last name of the new user in this text box
 - **Website** – (you can ignore this field)
 - **Password** – Clicking the *Show password* button will show you the password that has automatically been generated for the new user
 - **Send User Notification** – When ticked, WordPress will send your new user an email about their account
 - **Role** – Select the desired Role for this user from the dropdown list
- Here is a basic overview of the different user roles and the permissions associated with each one:
- **Administrator** – Somebody who has access to all the administration features

- **Editor** – Somebody who can publish and manage posts and pages as well as manage other users' posts, etc.
- **Author** – Somebody who can publish and manage their own posts
- **Contributor** – Somebody who can write and manage their posts but not publish them
- **Subscriber** – Somebody who can only manage their profile

WordPress will automatically generate a strong password when you create a new user. Clicking the *Show password* button will display the password that was generated and if you want, will also allow you to change it. The password strength indicator, shown just below the password field, must indicate at least Medium before WordPress will allow you to save the new user. It goes without saying, the stronger the password the more secure the login so it's advisable that the strength indicator shows your password as being Strong. To make a password stronger, use upper and lower case letters, numbers and symbols like ! " ? \$ % ^ &).

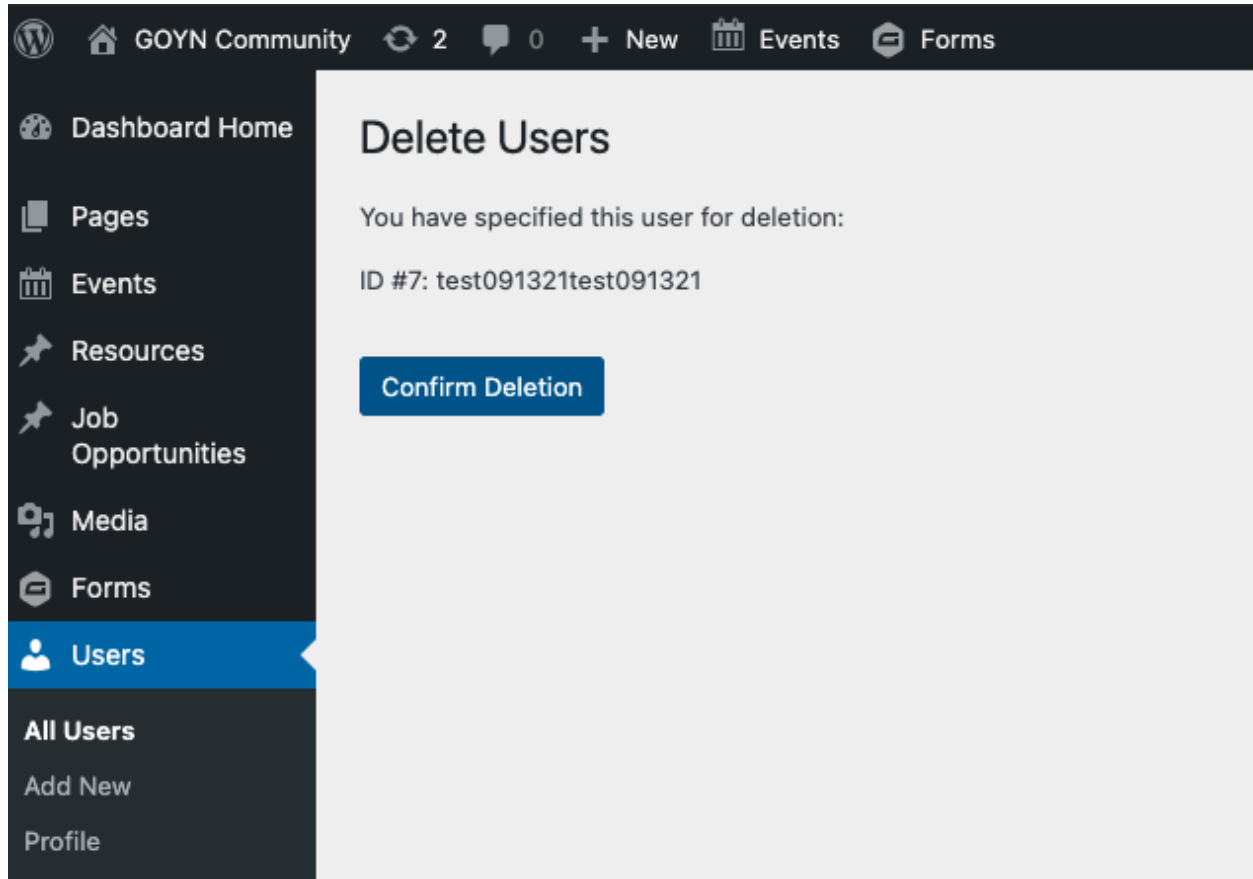


The screenshot shows the 'Add New User' form in the WordPress admin dashboard. On the left is a dark sidebar menu with options: 'Users' (selected), 'All Users', 'Add New', 'Profile', 'Site-wide + Archive Settings', 'Menu + Theme Settings', 'Tools', 'Developer Settings', and 'Collapse menu'. The main form area has the following fields and controls:

- Last Name:** A text input field.
- Website:** A text input field.
- Password:** A text input field containing the generated password 'BYwB2X)EHeWo7SRqQ\$jVi5vs'. To the right of the field is a 'Generate password' button and a 'Hide' button. Below the field is a green strength indicator that says 'Strong'.
- Send User Notification:** A checkbox that is checked, with the label 'Send the new user an email about their account.'
- Role:** A dropdown menu currently set to 'Subscriber'.
- Add New User:** A blue button at the bottom left of the form.

Deleting an Admin User

To delete a user, click on the *Delete* link that appears beneath the user name when hovering your cursor over each row. The *Delete* link won't appear for the user that is currently logged in.



Along with deleting the user you will be given the choice of what to do with all the content currently assigned to that User. The available choices are:

- **Delete all content** – This will delete all the content which this user created
- **Attribute all content to** – This will assign all the content currently linked to this User, to another User of your choosing. Simply select the User from the dropdown list

After making your selection, click the *Confirm Deletion* button to remove the User.

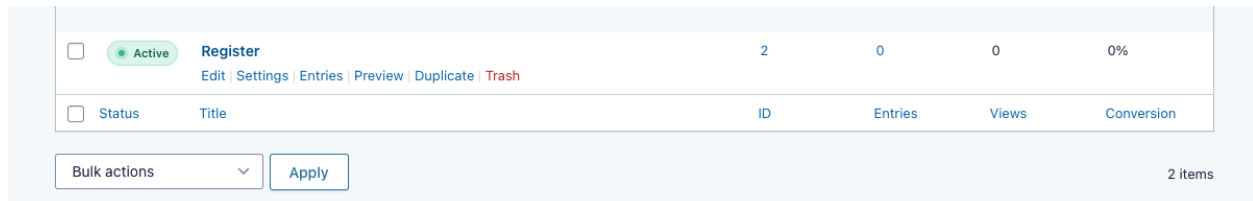
Registering Contacts

Contacts are different then User records - Users are individuals that can **log in to the site** and make edits (this is why we often refer to them as “Admin Users”). *Contacts* will not be able to actually log in to the site, however, you will be able to capture details about them with a form and access/export that list later.

From the public facing site, one can register themselves by going to the “Get Involved” page. They can also go directly to the “Register” page if they have a link (perhaps from an email or

social media post to link them directly to the registration form). In our sample site, the link is <https://goyncom.wpengine.com/register/>.

Once they submit the information from the registration form, it will be stored in the admin. Go to Forms > hover over the “Register” form > choose “Entries” to review, sort, and filter through all submitted entries.

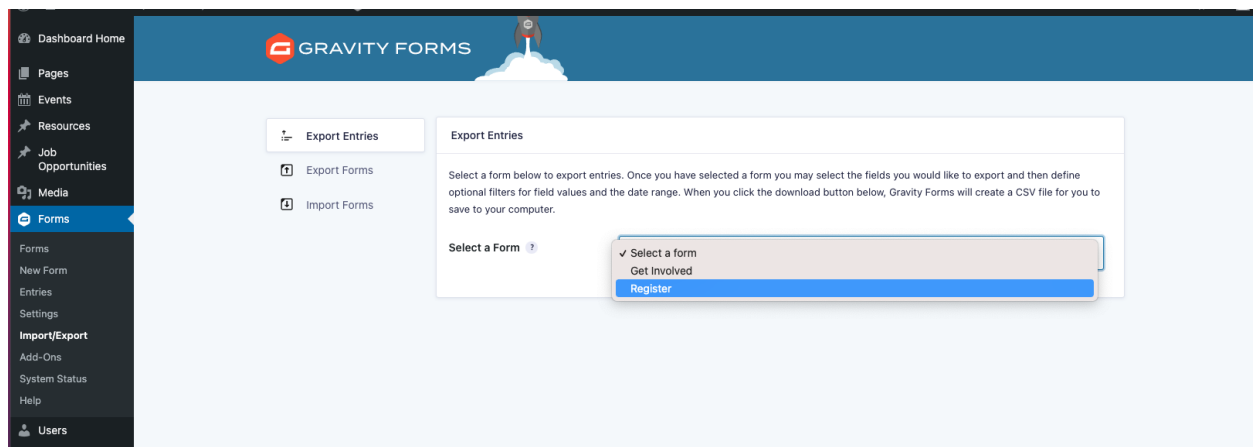


The screenshot shows the Gravity Forms admin interface. At the top, there's a table with columns for checkboxes, status, title, ID, Entries, Views, and Conversion. The 'Register' form is listed as 'Active' with 2 entries, 0 views, and 0% conversion. Below the table, there are 'Bulk actions' and an 'Apply' button. The bottom right corner indicates '2 items'.

☐	Active	Register	2	0	0	0%
☐	Status	Title	ID	Entries	Views	Conversion

Bulk actions 2 items

Import and export entries by navigating to “Import/Export” in the left side admin navigation, select the Register form in the dropdown menu, select the fields to include in the export, conditional logic and date ranges for exports are optional, then click “Download Export File”. It will download as a csv.

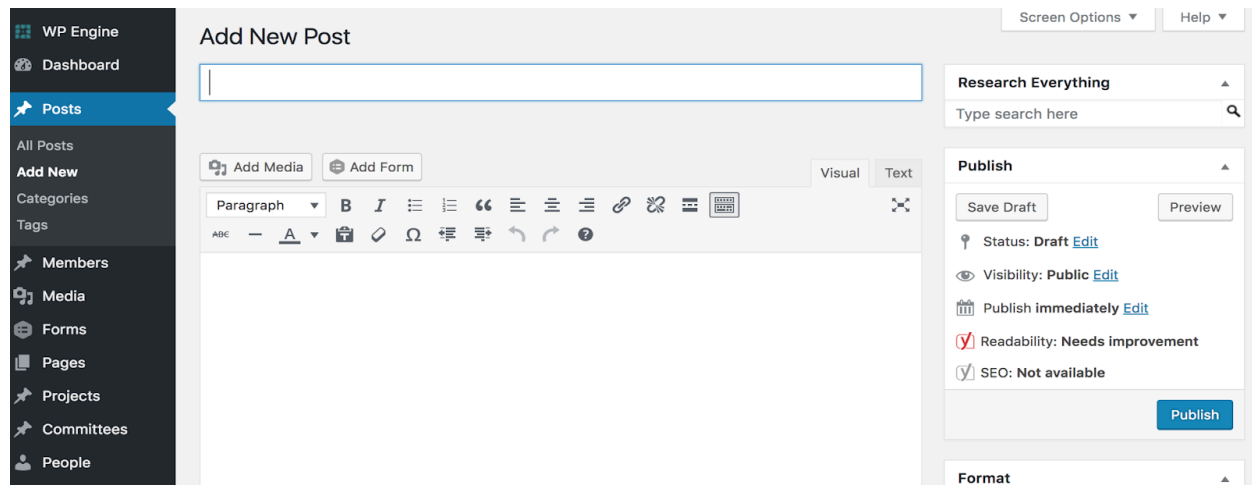


SEO

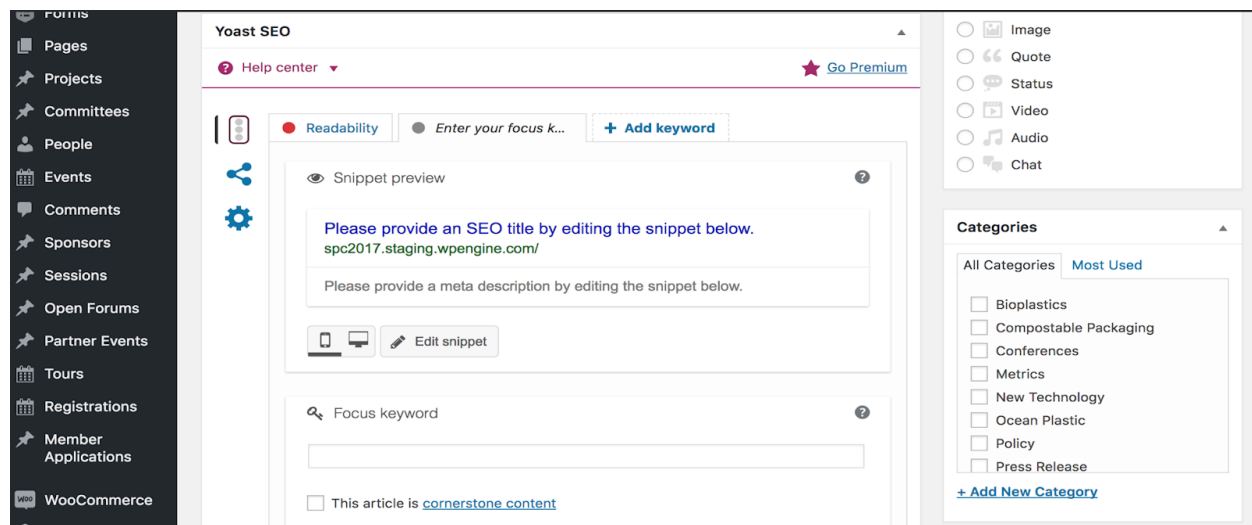
This is a feature that we (Aalto Creative) add for your convenience. This will help pull your website within search engines and give you the option to edit verbiage for your website's search results. To find more information about Yoast SEO (plugin) please use the following link: <https://yoast.com/wordpress-seo/>.

I would like to call out the options you have regarding the changing of search engine results per page/post. You can add certain keywords or change your “meta” titles to broaden a relatable search.

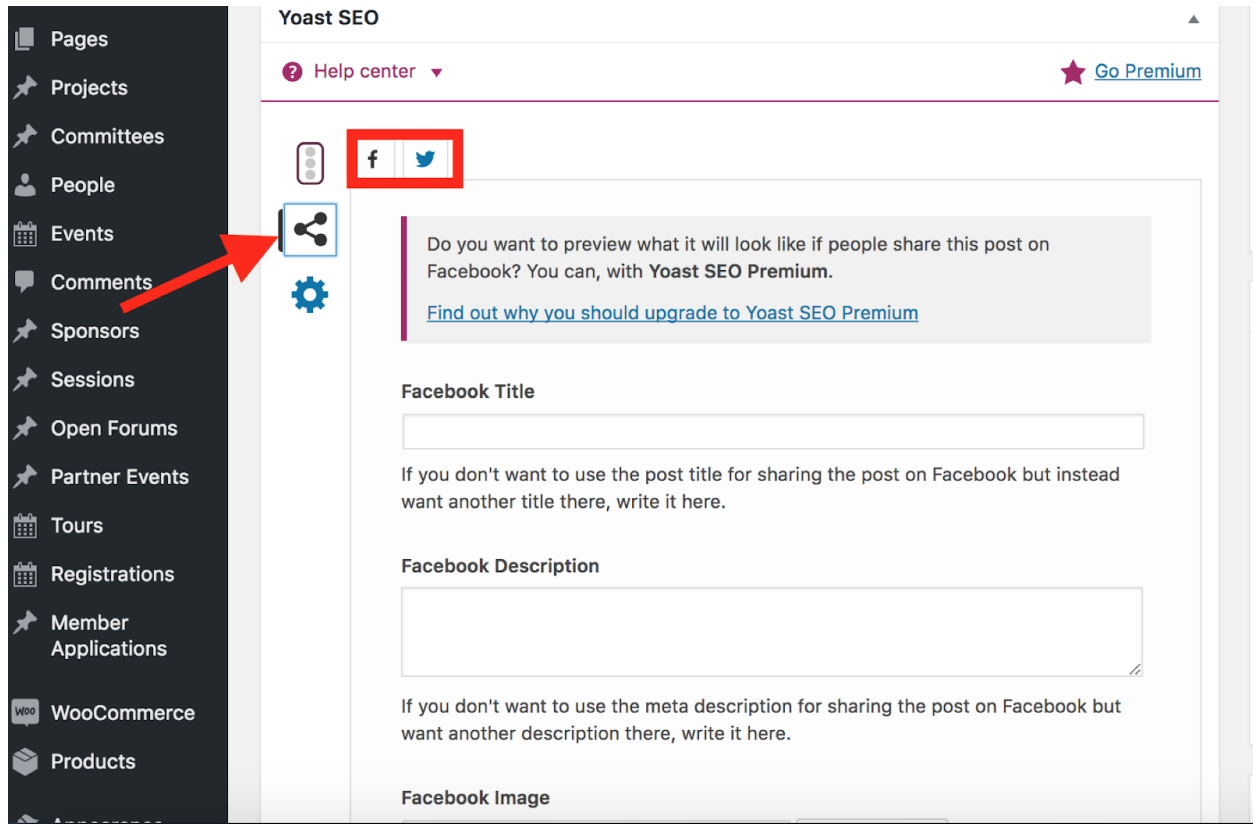
You may alter search information when you are creating a new post. After adding your new post and its description in the box below, you will be able to scroll down to the “Yoast SEO” option and edit your sites information.



Scroll down to the next available box in the middle of the page (as it will look like this)



You may also alter your social media platform to provide better search results. Please click on the social media side tab shown below (denoted by the arrow):



If social media has not updated from the changes you have made, please try using the following link to clear your cache: <https://developers.facebook.com/tools/debug/sharing/>.

Forms

Add or edit a form by going to “Forms” in the admin menu. “Add New” or click on an existing form title to edit. **Important:** once you create a form, you must then embed it into a page. Creating a form does not automatically create a page for it.

Form Embed

[Add Media](#) [Add Form](#)

Paragraph ▼ **B** *I* [List Icons] [Quote Icon] [Align Icons] [Link Icon] [Table Icon] [Image Icon] [Tablet Icon]

[gravityform id="1" title="false" description="false"]

Drag and drop form fields from the right hand side to build out your form. There are different sections of fields, Standard Fields, Advanced Fields, Post Fields, and Pricing Fields. Each form field has a description with more detail if you hover over the field name.

Once you drag and drop a form field into the form area on the left, you can edit field attributes by clicking on the field. Settings will show up for that field on the right side panel:

Resources
Job Opportunities
Media
Forms
New Form
Entries
Settings
Import/Export
Add-Ons
System Status
Help
Users
Site-wide + Archive Settings
Menu + Theme Settings
Tools
Developer Settings
Collapse menu

Name
First [] Last []
[Settings] [Add] [List] [Trash]

Phone
[]

Email
[]

File
[Choose File] No file chosen

Search for a field []

Add Fields **Field Settings**

Phone ID: 2
Allows users to enter a phone number.

General ^
Field Label ?
Phone []
Description ?
[]
Phone Format ?
(###) ###-#### v
Rules
☐ Required ?
☐ No Duplicates ?

Settings allow you to make a field required, edit the field label, add or edit a field description. Advanced settings allow you to edit the appearance of the field, add conditional logic, and more. Make sure you save your form in the upper right corner when you're done.

A full library of tutorials on using Forms can be found here:

<https://www.gravityforms.com/video-tutorials/>

Tools + Developer Settings

This area of the site should not be edited. The source software code that this site was built on is included in this section and should only be edited by experienced software engineers if need-be. URLs, date and time formats, login details, comment settings, media thumbnail settings, permalinks, and admin menu settings are included in this section of the Wordpress Admin dashboard.