

Website management in WordPress

WordPress is one of the most widely used website platforms in use today. It's very easy to use and customize.

Theresa Cassiday set up your website. She has full access to all functions of the website. If you have questions on site management:

402-541-5005 cell phone

theresa@catenacreations.com

Site management navigation

The administrative site is accessed through this URL:

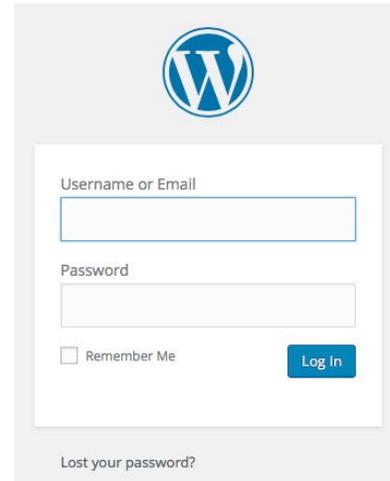
<https://clientwebsite.com/wp-login.php>

Type in your **User Name** and **Password** in the appropriate boxes to get to the main administrative screen.

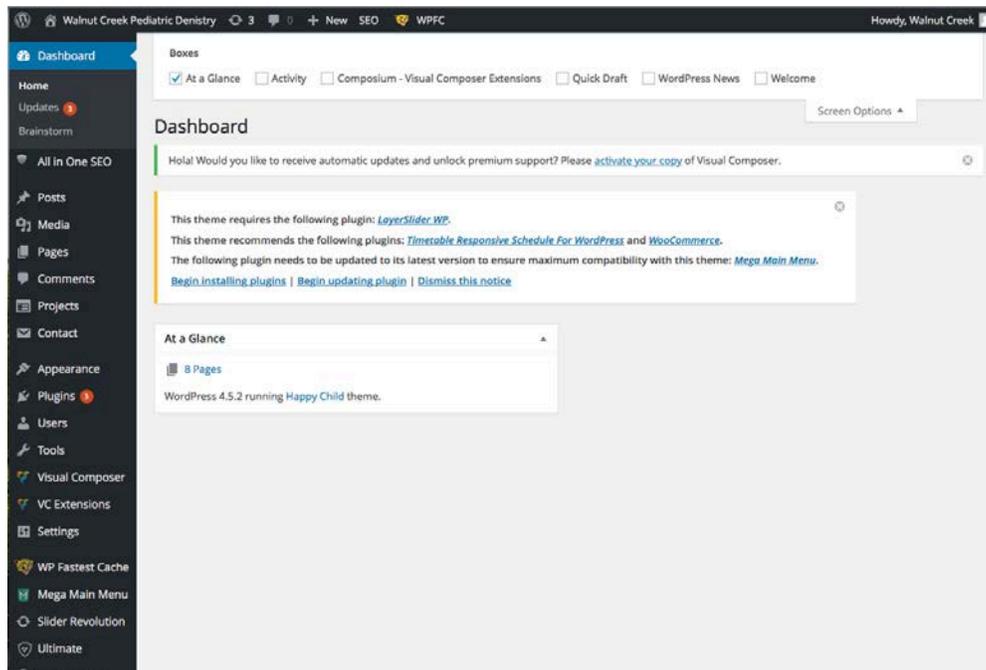
User name:

Password:

The WordPress Dashboard will appear. This will show a summary of your site activity. You may also see some messages about installing plugins or activating licenses, but you can ignore those.



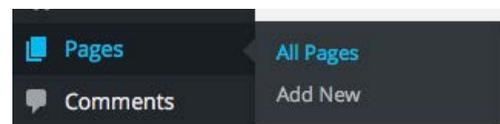
The image shows the WordPress login page. At the top center is the WordPress logo. Below it is a white login box with a light gray border. Inside the box, there are two input fields: 'Username or Email' and 'Password'. Below the 'Password' field is a checkbox labeled 'Remember Me'. To the right of the 'Remember Me' checkbox is a blue 'Log In' button. Below the login box, there is a link that says 'Lost your password?'.

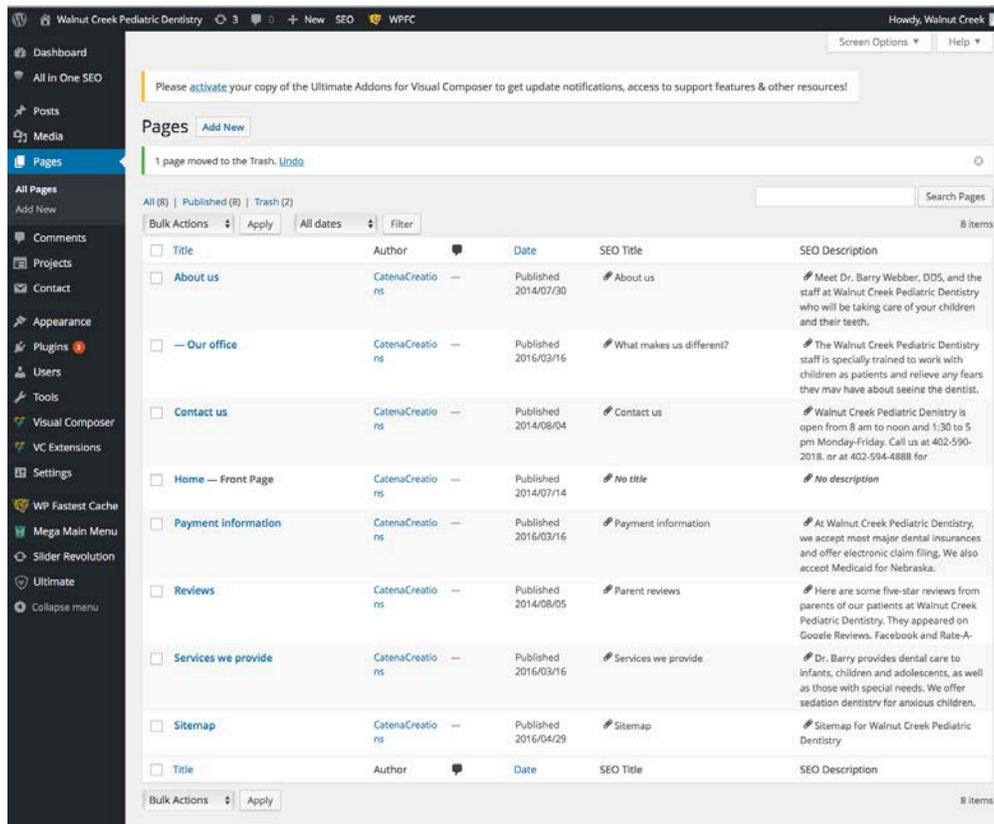


Update a page

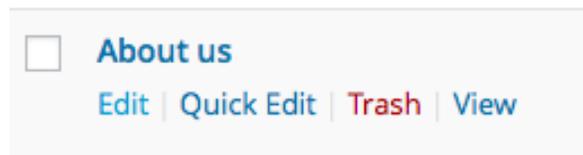
To access the pages, click on **Pages --> All pages**.

A list of all your pages will appear.



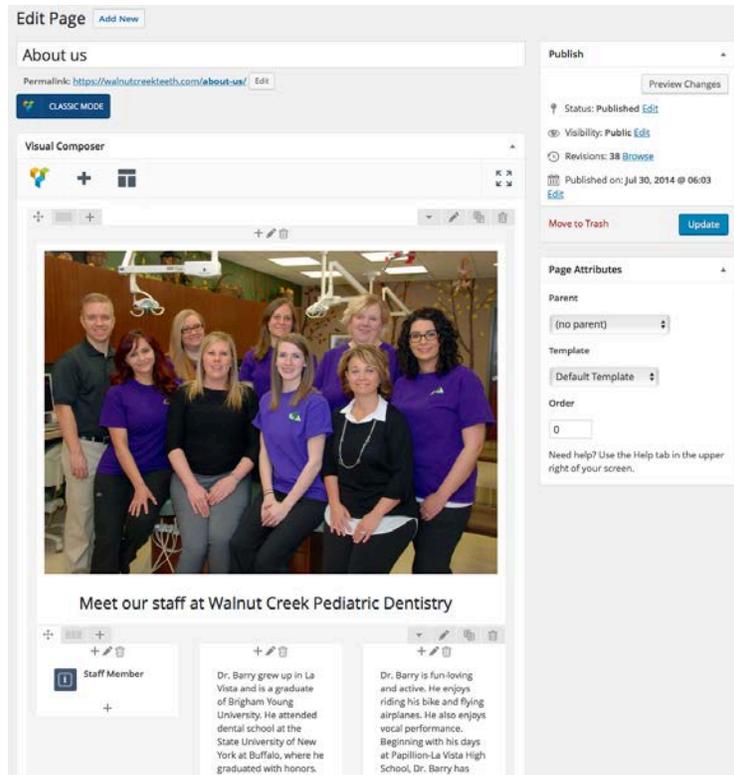


Scroll through the list and find the page you want to update. When you mouse over the name of the page, you will see four options appear. You can click on the name of the page, or click **EDIT** to open the page.



When the page opens, the first box you'll see is the **Page title**. This creates the page link and the link in the menu. **DO NOT** change this or it will change the menu.

You have two options for editing your site. Your page will open in the **Visual Composer** mode. This will show you the columns, rows and special elements that make up the page.



There is a tab called **Classic Mode** in the upper left corner. This changes the view to the classic WordPress text area.

When you click on the **Classic Mode** button, the default tab is the **Visual** tab. This gives you access to the easy editing tools. Once you're there, you'll want to see all the editing icons. Click on the last one in the top row to make them appear. This is called the **Toolbar Toggle** icon.

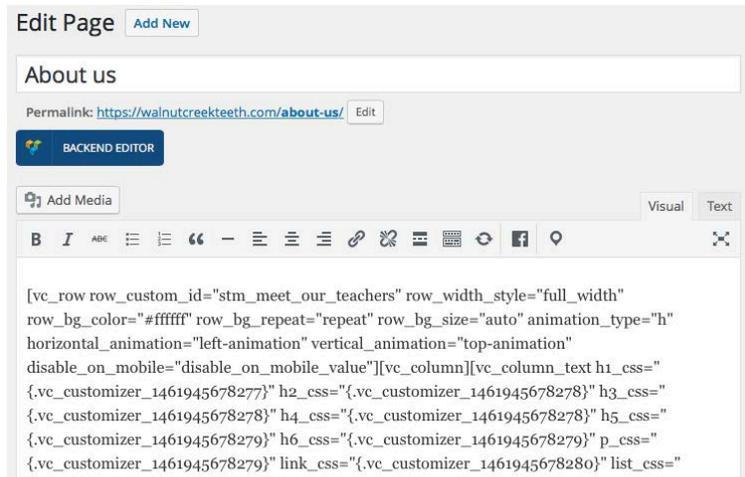


The other tab is **Text**, which gives the view of the exact HTML coding for the page. Some pages may open with this as the default. If they do, switch to the **Visual** tab.

You can edit content and write your page online within the WordPress website. However, if you're writing text for a new page, it's best to write and edit in Word. You can edit and spell check in Word, then copy and paste into WordPress.

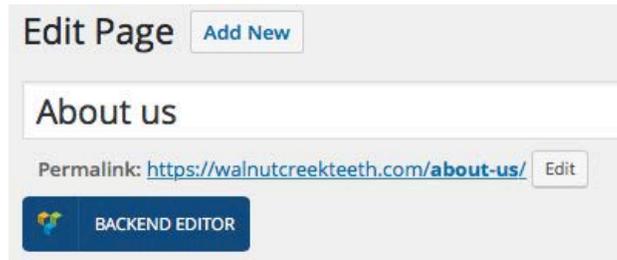
To edit in Backend Editor:

When you open a page in Classic Mode, you'll see a bunch of codes in brackets, such as `[vc_row][vc_column width="1/1"][vc_column_text]`. This means your page was created with the Visual Composer. This lets you add columns and different text formats without a lot of coding.

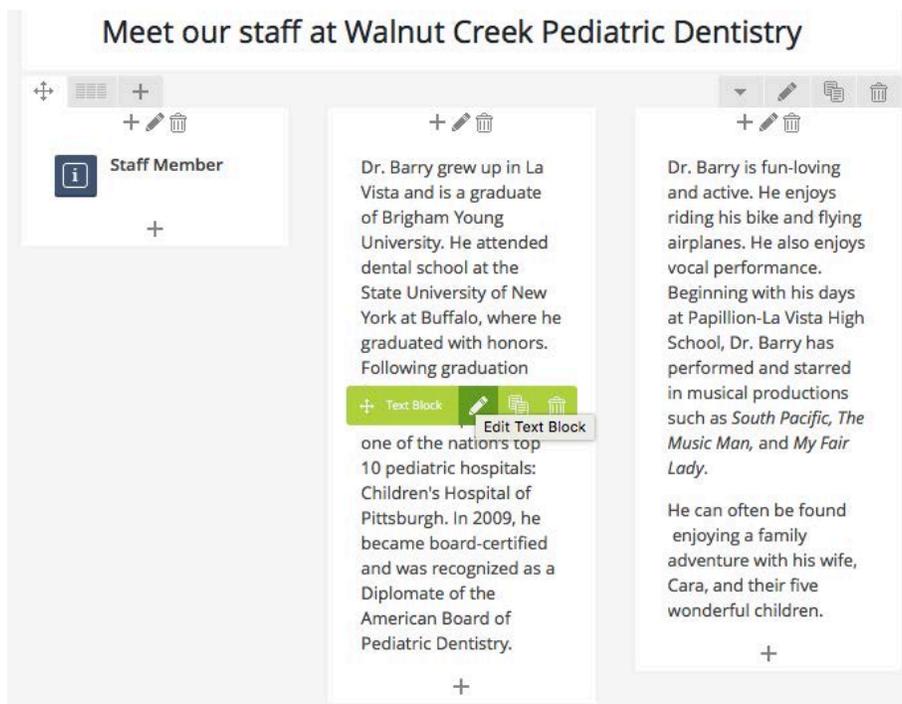


To edit this content:

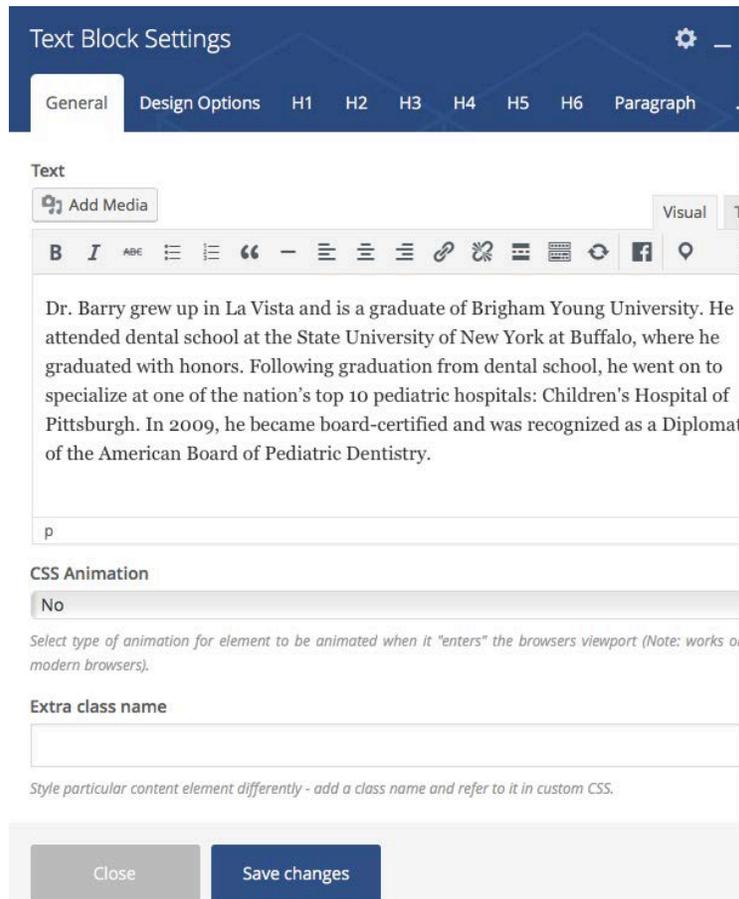
1. Click on the **Backend Editor** button to see the different parts of the page.



2. Mouse over the section you want to edit. A green bar with several buttons will appear: the plus with the four arrows lets you move the block; the pencil is **Edit**; the center button with two pages is **Copy** and the trash can is **Delete**. Click on the pencil icon.



3. A pop-up window that says **Text Block Settings** will open that gives you the options for editing that section. Edit the text and options, then click the **Save Changes** button at the bottom.



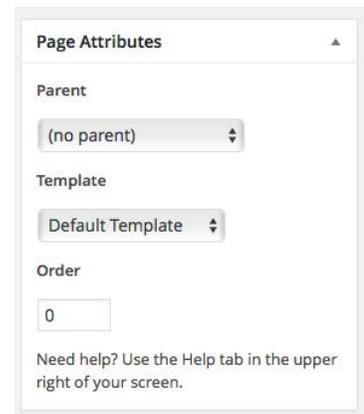
Page Attributes

You will see other settings on the right side of the page. These are the Page Attributes. They should be:

Parent: (no parent)

Template: Leave this on **Default Template**.

Order: Leave it set at 0.

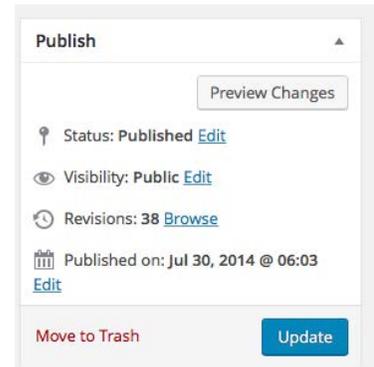


Publish your changes

After you edit your text, go through your page one more time to proofread your changes. Then click the **Update** button at the top of the screen.

To check your page, click the **View Page** button. The page will open in your browser.

To go back and edit your page, click on the **Edit Page** link at the top of the screen. Make your changes, then click on the **Update** button.

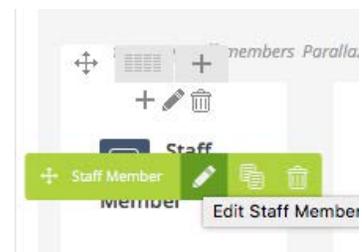


Edit/add a staff member:

The page that's most likely to need updating is the About Us page, which shows the staff's bios and photos. Each bio has two sections to edit: the **Staff Member** area and the bio **Text Block**.

The employee's photo, name and title are edited in the **Staff Member** area. To access this:

1. Mouse over the **Staff Member** area. When the green bar appears, click the **Pencil icon** to edit.



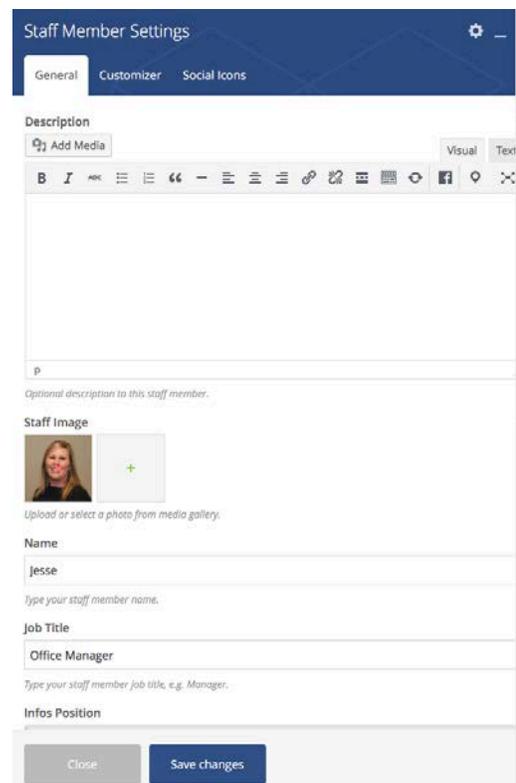
2. Three tabs will appear at the top: **General**, **Customizer** and **Social Icons**. Make sure the **General tab** is selected.

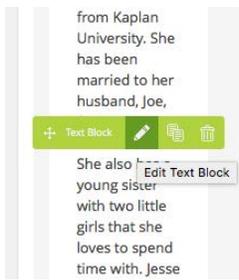
3. Scroll down to the **Staff Image** area. This is where you'll change the photo. Click on the red X in the middle of the current photo to delete it. Then click on the + sign in the blank box to add a new photo. This will take you to the Media Library. You can upload your photo from here, then select it to add it. (See instructions below for uploading a photo.)

NOTE: The staff photo **must** be cropped into a square, and the final size must be **200 x 200 pixels**. This is needed so the photo will appear correctly in the circle.

4. Once the photo is added, type the person's **Name** and **Job Title** in those boxes. You don't need to worry about the rest of the settings.

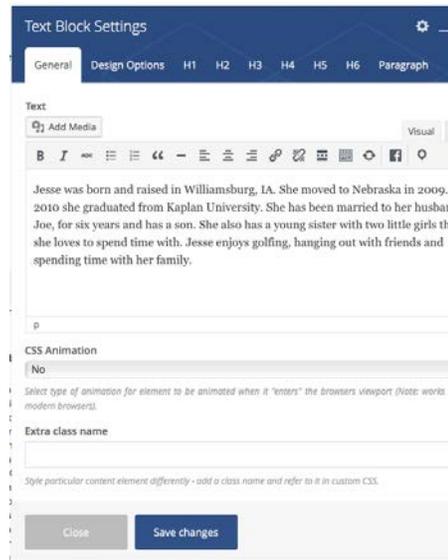
5. Scroll to the bottom and click the **Save Changes** button to save your work.





To edit the Staff Member text:

1. Mouse over the **Text Block**. When the green bar appears, click the **Pencil icon** to edit.
2. Several tabs will be seen at the top. Make sure you're on the **General tab**.
3. Delete the text that's in the current box, and copy/paste your new text in to the text area.

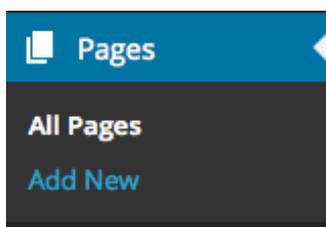


4. Click the **Save Changes** button to save your work.

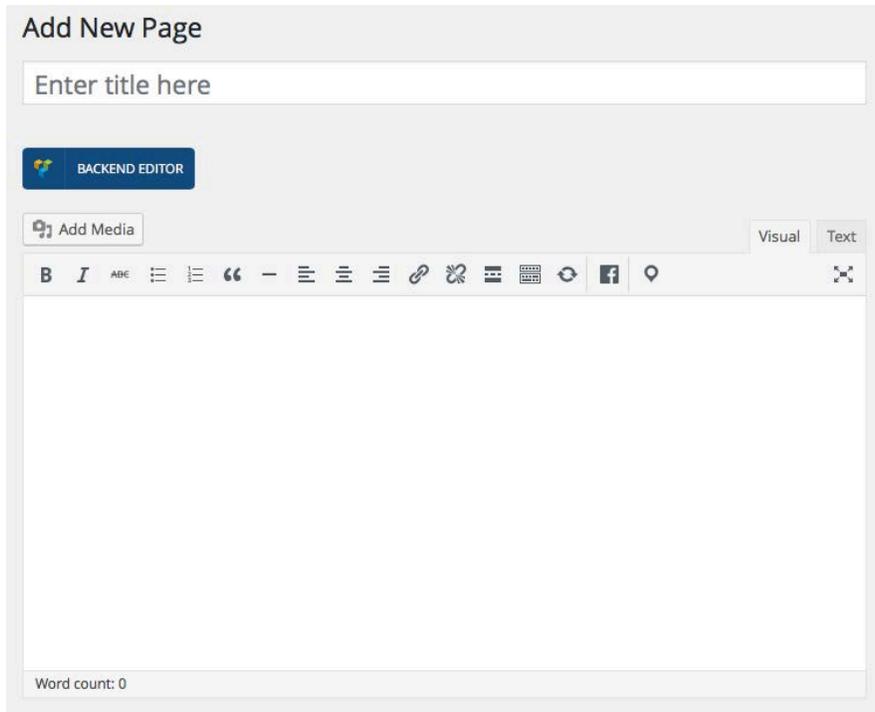
5. Scroll to the top of the page and click the **Update** button to save the page.

Create a new page

To add a new page: Click on **Pages > Add New**.



A blank page will appear. Click on the **Classic View** button (if needed) to get to the standard WordPress view.



Type the **page headline** in the box at the top. This will be the page link, as well as the menu link. Keep it short -- no more than 1 or 2 words, or it won't fit in the menu.

Below that, you'll see **Backend Editor** button. For now, we'll stay in the **Classic** mode.

At the top of the text area you'll see two tabs: **Visual** and **Text**. These allow you to create your page in regular WordPress format.

The default tab is the **Visual** tab. This gives you access to the easy editing tools. Once you're there, you'll want to see all the editing icons. Click on the last one in the top row to make them appear. This is called the **Toolbar Toggle** icon.



The second tab is **Text**, which gives the view of the exact HTML coding for the page. Some pages may open with this as the default. If they do, switch to the **Visual** tab.

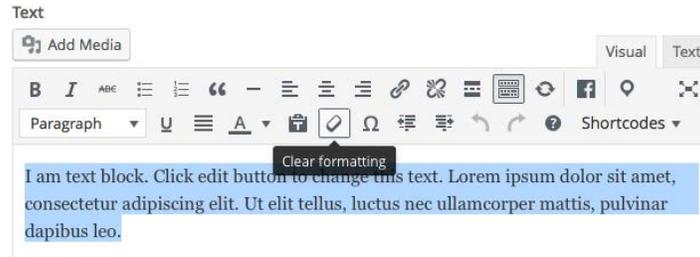
You can edit content online within the WordPress website. However, if you're writing text for a new page, it's best to write and edit in Word. You can edit and spell check in Word, then copy and paste the text into WordPress.

Type your text into the Text Area. Format it as needed.

Cleaning up your text from Word

Word is a great tool for editing text. However, when you copy this text and paste it into WordPress or another content management system, you'll also take along all the coding that formats the Word document. You don't want this on your webpage -- it will corrupt the look of your page, and will greatly slow down the website.

To clean up the text, select and highlight all of it. Then click on the **Clear formatting** icon. This will remove all formatting from Word.



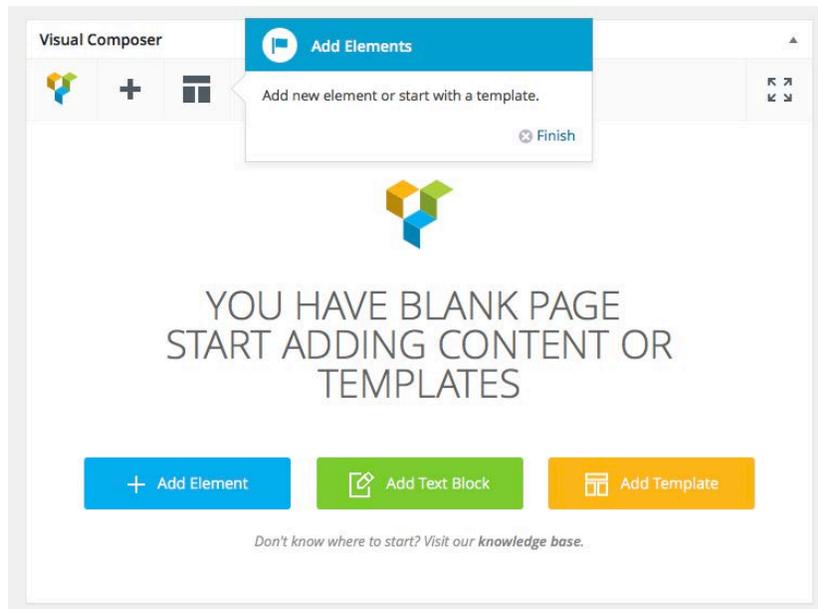
When your text is copied and cleaned up, go to the top of the page and click **Save Draft**.

To create a page with the Backend Editor:

1. Click on the **Backend Editor** button.

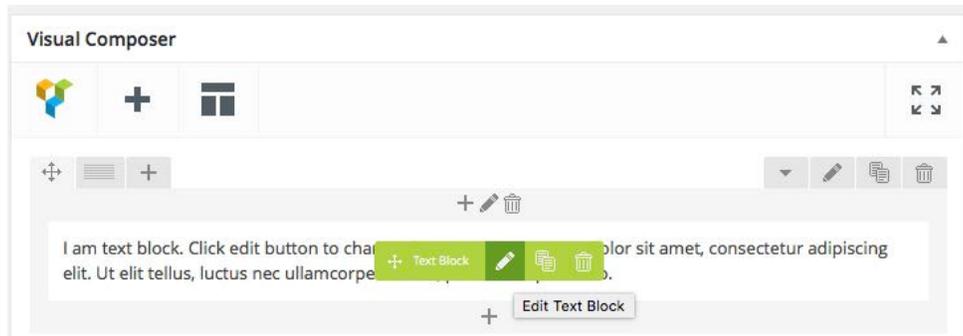


A blank page in the Visual Composer will appear.



2. You'll usually want to add a text block first. Click on **Add Text Block**, and one will appear automatically.

3. Mouse over the text block to bring up the editing buttons. Click on the pencil to add your text and images. If you copy and paste text from Word, clear the formatting as described above.



4. Click the **Save Changes** button in the bottom left corner to update the text.



All in One SEO Pack settings

We use the All in One SEO Pack plug-in to add features so we can customize our page titles and descriptions, which enhances the Search Engine Optimization (SEO) for the site. You will need to do two things here:

- 1. Write a Title.** This should be a short snippet of 2-4 words that describe the page. Total length should be 60 characters or less. The section | **Walnut Creek Pediatric Dentistry** will be added to the end of the title. This section takes 32 characters, so the front part of the title should have no more than 28 characters.
- 2. Write a Description.** This area should be 150 to 160 characters. You can copy and paste text from the page here, or you can write a new description. Be sure to include one or two keywords that you want the search engines to find.
- 3. Other settings:** Leave all the other options in this section **unchecked**.

Training | Walnut Creek Pediatric Dentistry

https://walnutcreekteeth.com/?page_id=4036
This is the training page for Walnut Creek Pediatric Dentistry.

? Title
43 characters. Most search engines use a maximum of 60 chars for the title.

? Description
63 characters. Most search engines use a maximum of 160 chars for the description.

? Robots Meta NOINDEX

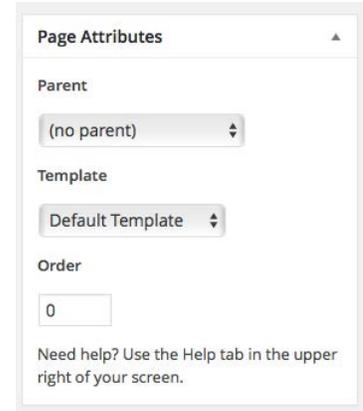
Set Page Attributes

On the top right side of the page is a box called **Page Attributes**. This sets the format and location for the page.

Parent: This is the top level link under which your page will appear. Click the drop-down list to see where your page should go.

Template: Leave this set to **Default template**. All pages use this template.

Order: Leave this set at 0.



Page Attributes

Parent
(no parent)

Template
Default Template

Order
0

Need help? Use the Help tab in the upper right of your screen.

Upload and insert artwork

You can add photos and artwork to your pages. When doing so, keep in mind that the area for an inside page is about 1100 pixels wide. So you want to make your photos and artwork 1100 pixels wide or less.

It's easiest to use PhotoShop or another photo editing program to edit your artwork and get it to the final size before you upload it to the Media Library. Or you can use this website and follow the steps: <http://picsize.com>

Once your photos are ready and in order, you need to rename them in a format that help your search engine optimization. Use this format, and put dashes between the words:

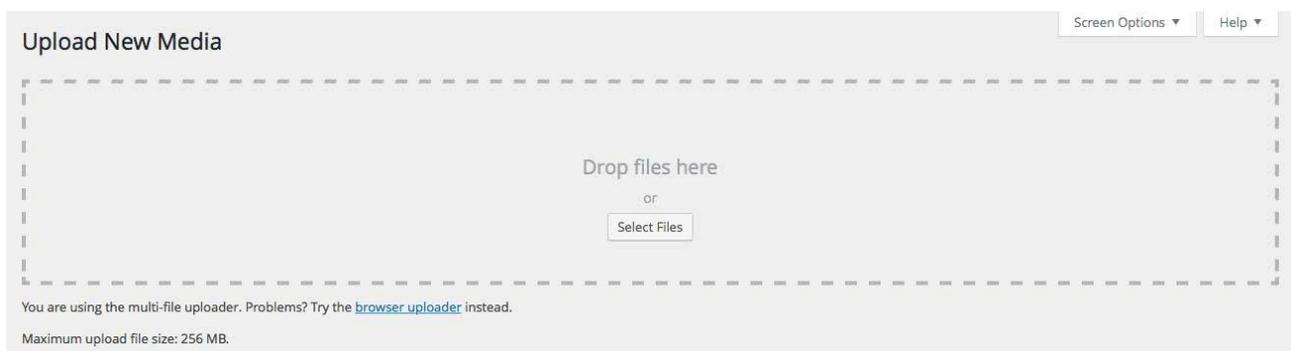
picture-name-walnut-creek-pediatric-dentistry-omaha

To add artwork to the Media Library:

Scroll to the top of the page and find the **Media** category in the **Dashboard** menu on the left. Click on the **Add New** link.



The **Upload New Media** screen will appear. Click on the **Select Files** button.



Upload New Media

Drop files here
or
Select Files

You are using the multi-file uploader. Problems? Try the [browser uploader](#) instead.
Maximum upload file size: 256 MB.

Navigate to the folder on your computer where the image is stored. Click on the file, then click **Choose**.

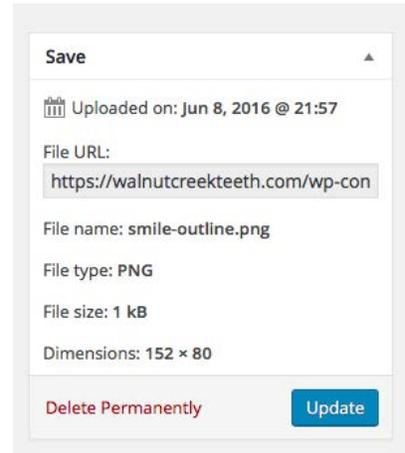
NOTE: You can select more than one file to upload by holding the **CTRL** key and clicking on all the files you want to upload. Then click **Choose**.

The file will upload and a line will appear under the upload area. Once this line has changed from **100%** to **Edit**, the photo is uploaded.



Click the **Edit** link. Scroll down to the **Alt Text** box and write a short description of the image. These descriptions are for visually impaired readers using a screen reader. This also helps with search engine optimization.

Click the **Update** button at the upper right corner of the screen to save the changes.

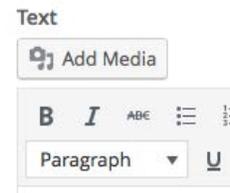


Insert artwork that's already been uploaded into a page or post:

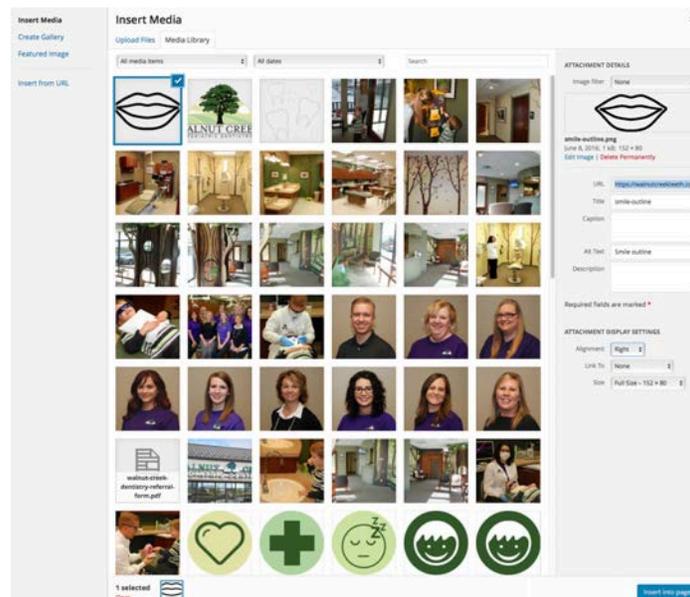
Open the page where you want to insert artwork.

Scroll down to where you want your artwork to appear, and click the cursor at the beginning of the paragraph. Then click the **Add Media** button.

The **Insert Media** screen will appear. You can upload files now, if you want. Or click the **Media Library** tab to find one that's already uploaded.



When you click the **Media Library** tab, thumbnails of your site's images will appear. Click on the thumbnail of the image you want, then review the information in the column on the right to make sure you've selected the correct image.



If the **Alt Text** field is blank, fill it in.

For **Alignment**, click the drop down menu to select **Left**, **Center** or **Right**.

For **Link To**, change Media File to **None**.

For **Size**, change to **Full Size**.

Click **Insert into page** at the bottom right corner of the screen.

To edit an image:

Click on the image. Six icons will appear over it. The first four let you choose alignment of the photo: left, center, right, none. The fifth is of a small pencil -- the **Edit Image** icon. The sixth is an X. This is the **Delete Image** icon. Click on the **Edit Image** icon.



The **Image Details** screen will appear. You can change the alignment, size, link and alt text here. Click the **Update** button in the lower right corner when your changes are complete.

Image Details

Caption

Alternative Text

DISPLAY SETTINGS

Align

Size

Link To

ADVANCED OPTIONS ▾



When your images are in the page, if you're in Visual Composer mode, click **Save Changes** to save the image. Scroll to the top of the page and click **Update** again to save the page.

Add a link

To link to another page outside your site:

Open another window or tab in your browser and navigate to the page you want to link to in the page or post.

Click in the address line and highlight the URL. Type **CTRL+C** to copy the URL.

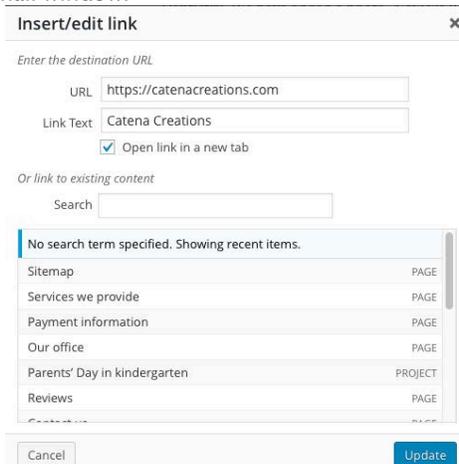
Go back to the page you're editing. Highlight the text you want to be linked. Click on the **Insert/edit link icon**.



A small window will appear. Click in the box. Type **CTRL+V** to paste in the link you just copied.



If you want the link to open in a new tab or window, or you need to search for a page on the website, click the gear icon on the right. This will open another small window.



Click the box next to **Open link in a new tab** if that's what you want it to do. Our rule of thumb is if the page is off the site or you're linking to a PDF, it should open in another tab. If you're linking to another page on the site, it should open in the same tab.

This is the training page for Walnut Creek Pediatric Dentistry. We have added a photo. Now we'll add a link.

Link to [Catena Creations](https://catenacreations.com)

Click the **Update** button. Your link should be underlined in the text.

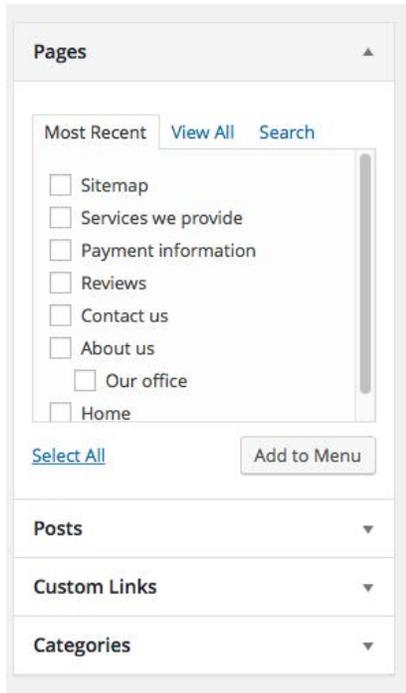
If you're in Visual Composer mode, click **Save Changes** to save the link. Then scroll to the top of the page and click **Update** to save your changes.

Add a page to the menu

When you add a new page to the website, it isn't automatically added to the menu. You need to move it there yourself.

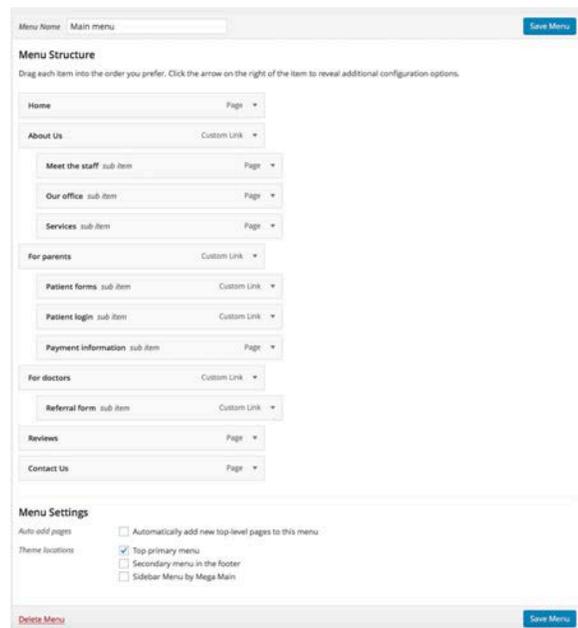
1. Click on **Appearance > Menus**.

2. Look at the **Pages** box. Scroll through until you find your new page.



3. Click on the box next to the page you want to add. Then click on **Add to Menu**.

4. The new menu item will appear at the bottom of the list.



5. Click, hold and drag the item so it lands where you want it.

6. Click **Save Menu** in the bottom right corner of the page to save your menu.

7. Go to the website and click the refresh button to load the new page. Check to make sure your menu item appears.

WordPress maintenance and updates

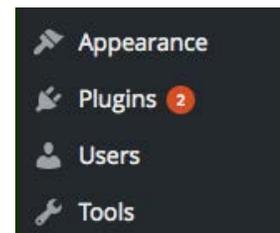
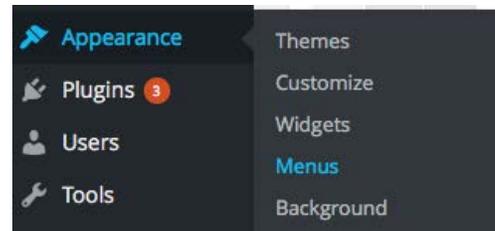
The WordPress system will update automatically as new versions are posted. You'll need to keep an eye on your site to make sure an update doesn't break something.

From time to time, when you sign in to your site you'll get a notice that a plug-in needs to be updated. There will be a number in a red circle next to the Plugins link.

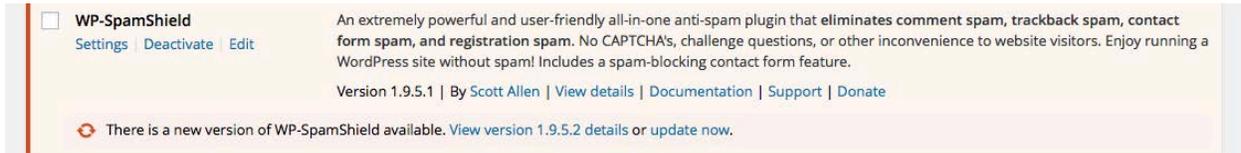
To update a plugin:

1. Click on the **Plugins** link.

2. Scroll down to the plugin where the background has changed from blue to pink. This is the plugin that needs to be updated.



3. Click the **update now** link.



4. The red arrows will rotate while the update is being processed. When it's finished, the box will turn blue and the screen will say **Updated!**.



There is one other plugin included in the theme that also needs to be updated: the Main Mega Menu. You can find it under **Appearance > Install Plugins**. To update this, click the **Update** link.

NOTE: I have had problems in the past with the automatic update for this. If that happens, please email me and I'll contact support.

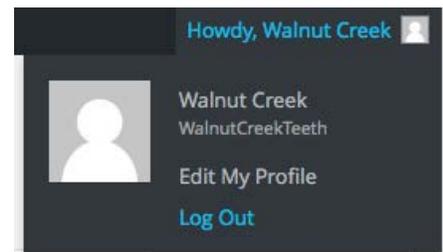
Slider Revolution also will need to be updated. I am checking with support on how to update this.

Logging out

When you're finished updating the site, please **log out**.

In the upper right hand corner will be an area that says **Howdy, Walnut Creek**. Click on this area, then click on the **Log Out** link.

You will be returned to your login screen.





You are now logged out.

Username or Email

Password

Remember Me

Lost your password?
[← Back to Walnut Creek Pediatric Dentistry](#)

Sometimes if you have multiple pages open, when you log out of the last page, you will get a message that asks, "Are you sure you want to log out?" The words **log out** will be highlighted. Click on that link and you will log out.

You are attempting to log out of Walnut Creek Pediatric Dentistry

Do you really want to [log out?](#)