



State Association Website Training Guide

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Getting started with your new website

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

- Update the text on the pages
- Enter the content in your members only sections
- Setup your member and industry partner directories
- Enter upcoming events
- Enter your ads
- 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 to the Admin Area of your site

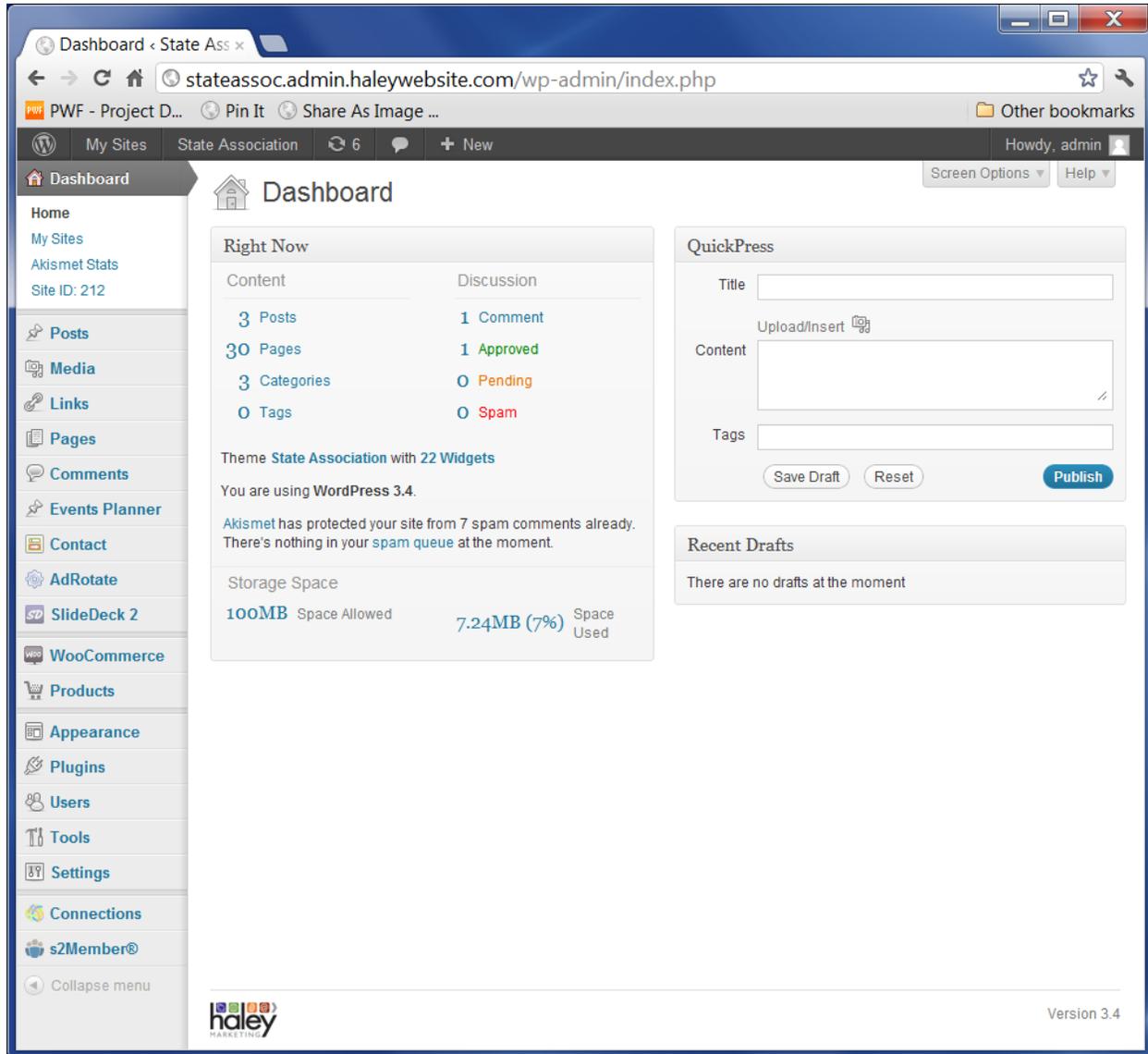
Your site was created with WordPress as your content management system. You must login to the WordPress Admin area of your site to make any updates to the site.

1. Using any current browser, go to
[http:// <your_company_domain>.admin.haleywebsite.com/wp-admin/](http://<your_company_domain>.admin.haleywebsite.com/wp-admin/)
(e.g., <http://capitalareastaffingassociation.admin.haleywebsite.com/wp-admin/>)
2. Enter your user name and password and press the Log In button. (Note that passwords are case sensitive.) If you have not received your login information, please contact support@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.

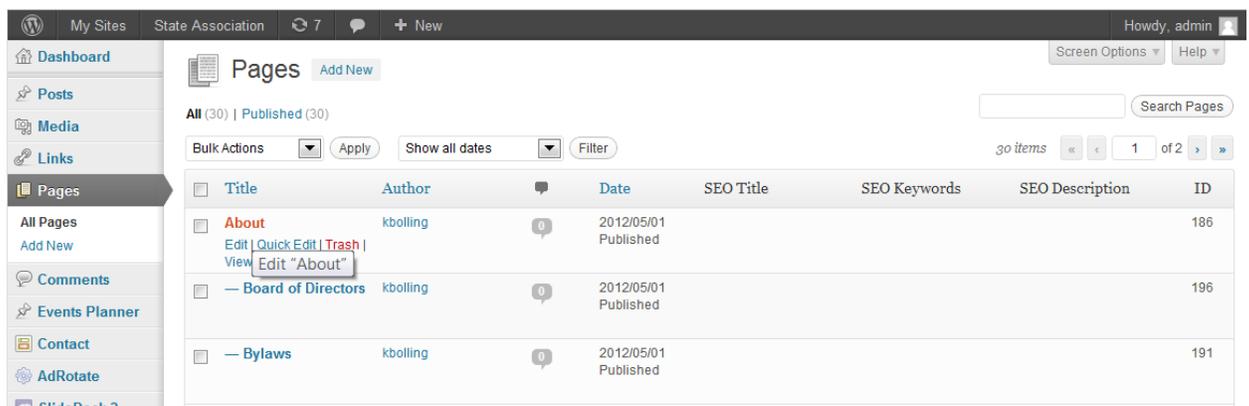
The left-hand navigation menu provides links to all of the WordPress administration screens, with submenu items displayed on hover.

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 screenshot shows the WordPress admin dashboard for a 'State Association' site. The 'Pages' menu item is selected in the left sidebar. The main content area displays a list of pages with columns for Title, Author, Date, SEO Title, SEO Keywords, SEO Description, and ID. The 'About' page is the first item in the list, and its title is highlighted. A tooltip menu is visible over the 'About' title, showing options: Edit, Quick Edit, Trash, View, and Edit 'About'.

Title	Author	Date	SEO Title	SEO Keywords	SEO Description	ID
About	kbolling	2012/05/01 Published				186
— Board of Directors	kbolling	2012/05/01 Published				196
— Bylaws	kbolling	2012/05/01 Published				191

- 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.

The screenshot shows the WordPress 'Edit Page' interface. The main content area displays the following text:

About [your state/region] Staffing Association

Explain the purpose of your organization – why you exist, what you do, who can join. For example:

The [your state] Staffing Association is the voice of the local staffing industry. We promote the interests of our members through legal and legislative advocacy, public relations, education, and the establishment of high standards of ethical conduct.

Members offer a variety of services, including temporary help, permanent placement, temporary-to-permanent placement, long-term and contract help, managed services (often called "outsourcing"), training, human resources consulting, and PEO arrangements, in which a staffing firm assumes responsibility for payroll, benefits, and other human resource functions.

Please contact [name] at [email address] or [phone number] for more information about the [your state] SA. We are an affiliated chapter of the American Staffing Association (ASA).

About ASA

 MEMBER OF
American Staffing Association

The association was founded in 1966 as the Institute of Temporary Services to ensure that quality temporary help services were available to businesses and to promote flexible employment opportunities for people. In 1970, the institute became the National Association of Temporary Services. In 1994, the name was expanded to National Association of Temporary and Staffing Services because many of our members were offering more than temporary help services. Five years later, the name was changed to American Staffing Association to better reflect the full range of staffing and human resources services offered by member companies.

The right sidebar contains the following sections:

- s2Member@**: Page Level Restriction? (dropdown), Require Custom Capabilities? (checkbox).
- Publish**: Preview Changes (button), Status: Published (with Edit link), Visibility: Public (with Edit link), Published on: May 1, 2012 @ 10:07 (with Edit link), Move to Trash (link), Update (button).
- Page Attributes**: Parent: (no parent) (dropdown), Template: Default Template (dropdown), Order: 0 (input).

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** 

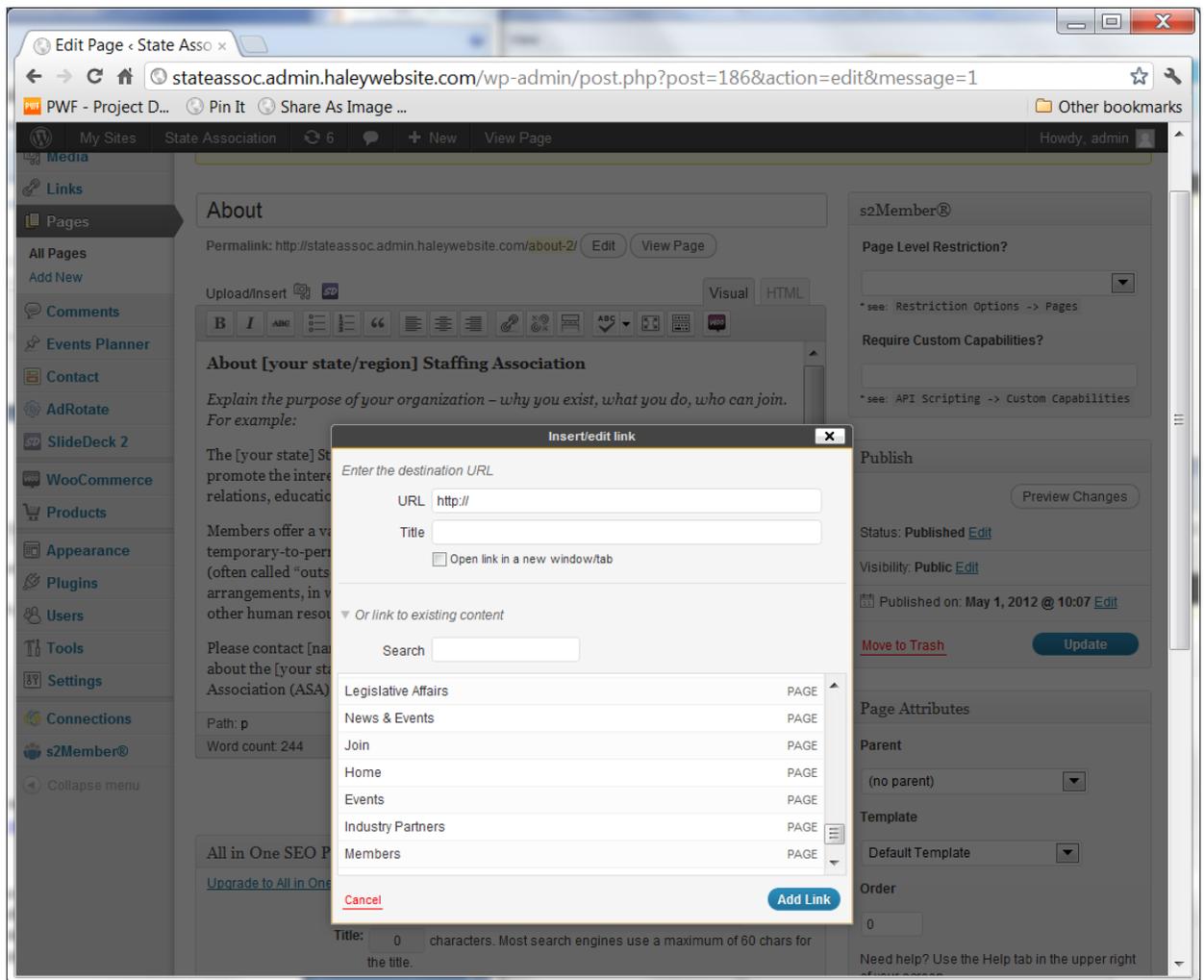
We strongly recommend that if you are cutting and pasting text from Word, that you use the Paste from Word option. This will strip out any Word formatting that could render wrong or even break your site. Just press the button and paste your text into the box provided.

- **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

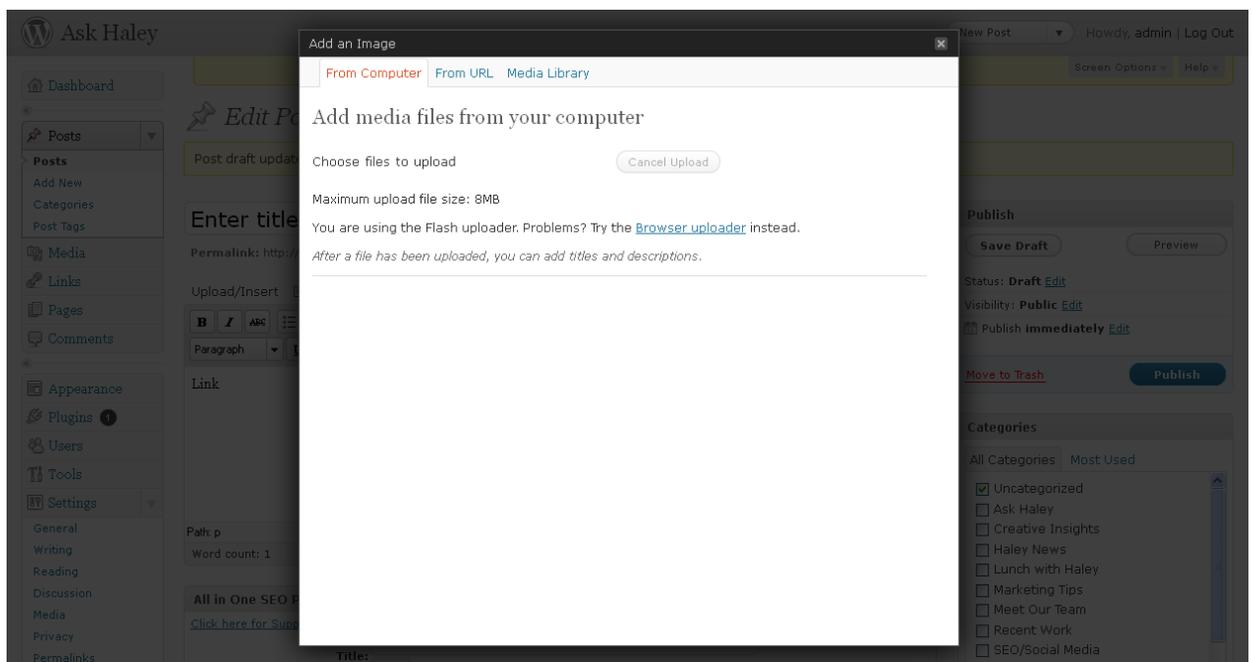
recommend checking the box next to “Open link in a new window/tab.” That way, visitors to your site will always have a window open, making it easy to return to your website.

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** 

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.

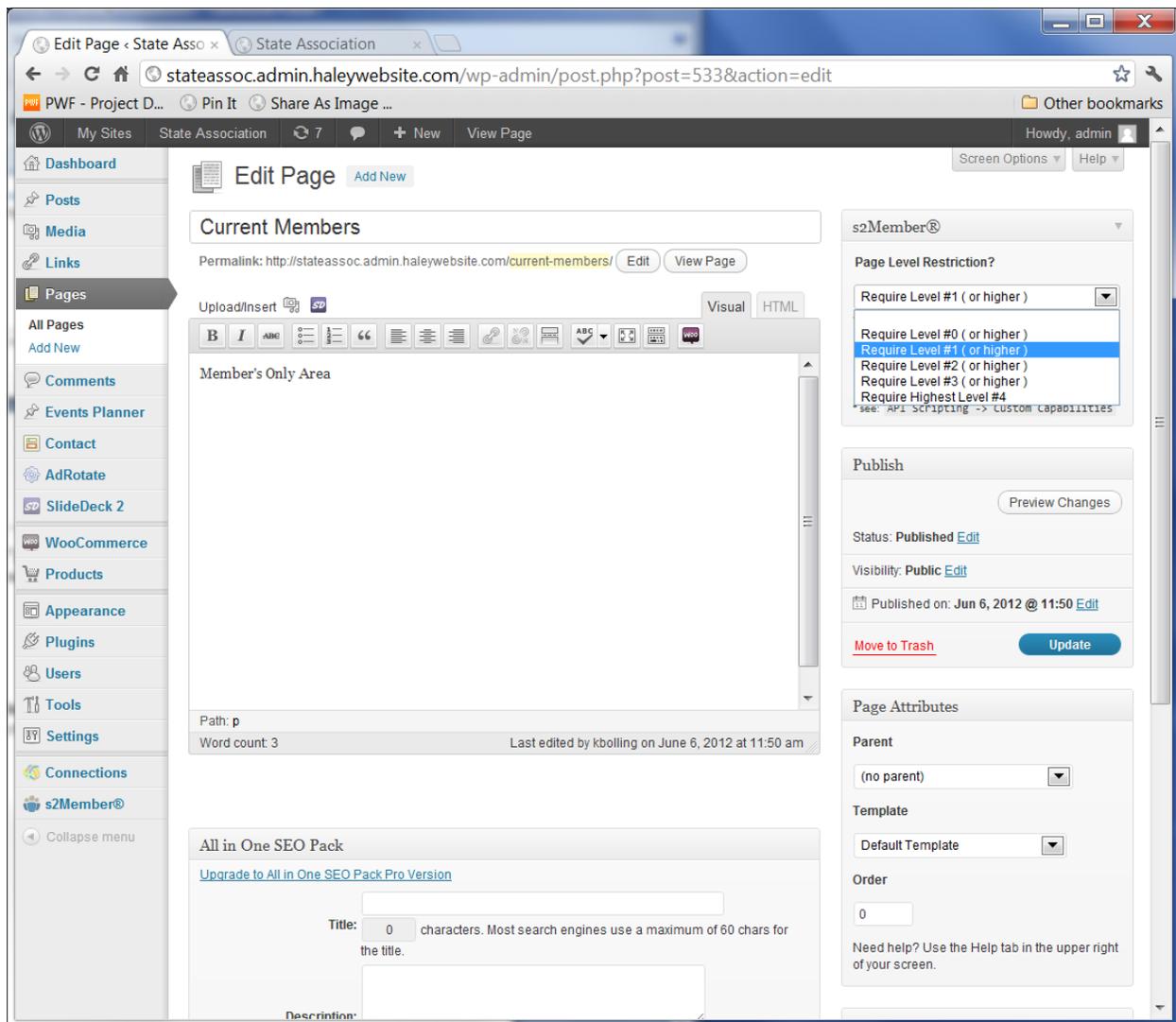
Managing “Members Only” pages

Your site has a “members only” area that is only accessible with a login. There are two types of access levels for these pages:

Level #1 – Members only

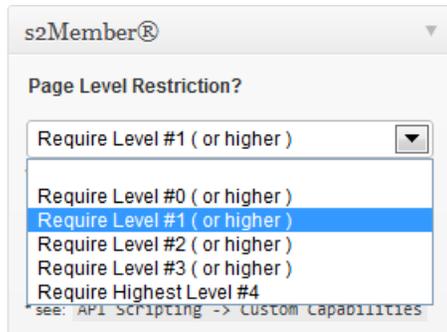
Level #2 – Industry Partners *and* Members

Initially, your site is setup with a Current Members page, limited to Members only, and a Current Industry Partners page, limited to Industry Partners and Members. You can add content to these pages using the instructions in the **Updating the text on pages** above.



If you add pages that you would like to be in the “members only” areas, you will need to restrict the pages:

- From the page that you want to restrict, select the appropriate level from the s2Member box in the top right side of the window. Again, Level #1 will allow only members to see the page content, while Level #2 allows both industry partners and members to see it.

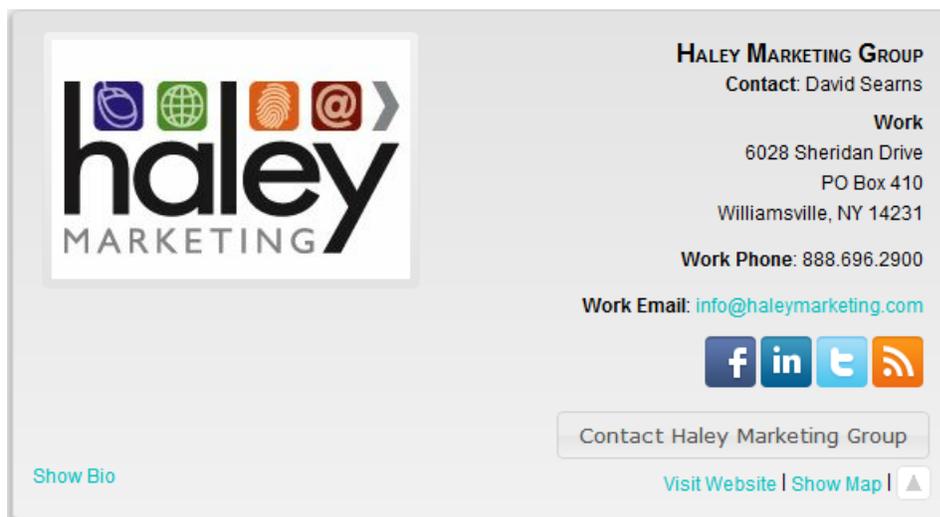


Managing your Member and Industry Partner Directories

Your site includes two separate directories: one for association members, and one for industry partners. Based on the categorization you select when entering the member information, the listing will be displayed on the respective page of your site. The directory can be searched by category or keyword.

Each member can be setup with a logo, company name, address, phone, web address, social media links, and a bio (brief description). If the address is entered, a Google map is automatically generated.

When someone wants more information about one of your members, a convenient contact form is displayed (if an email address is present for the directory entry). The contact form submits the email to the member and is copied to the state association site administrator email as well.



HALEY MARKETING GROUP
Contact: David Searns

Work
6028 Sheridan Drive
PO Box 410
Williamsville, NY 14231

Work Phone: 888.696.2900

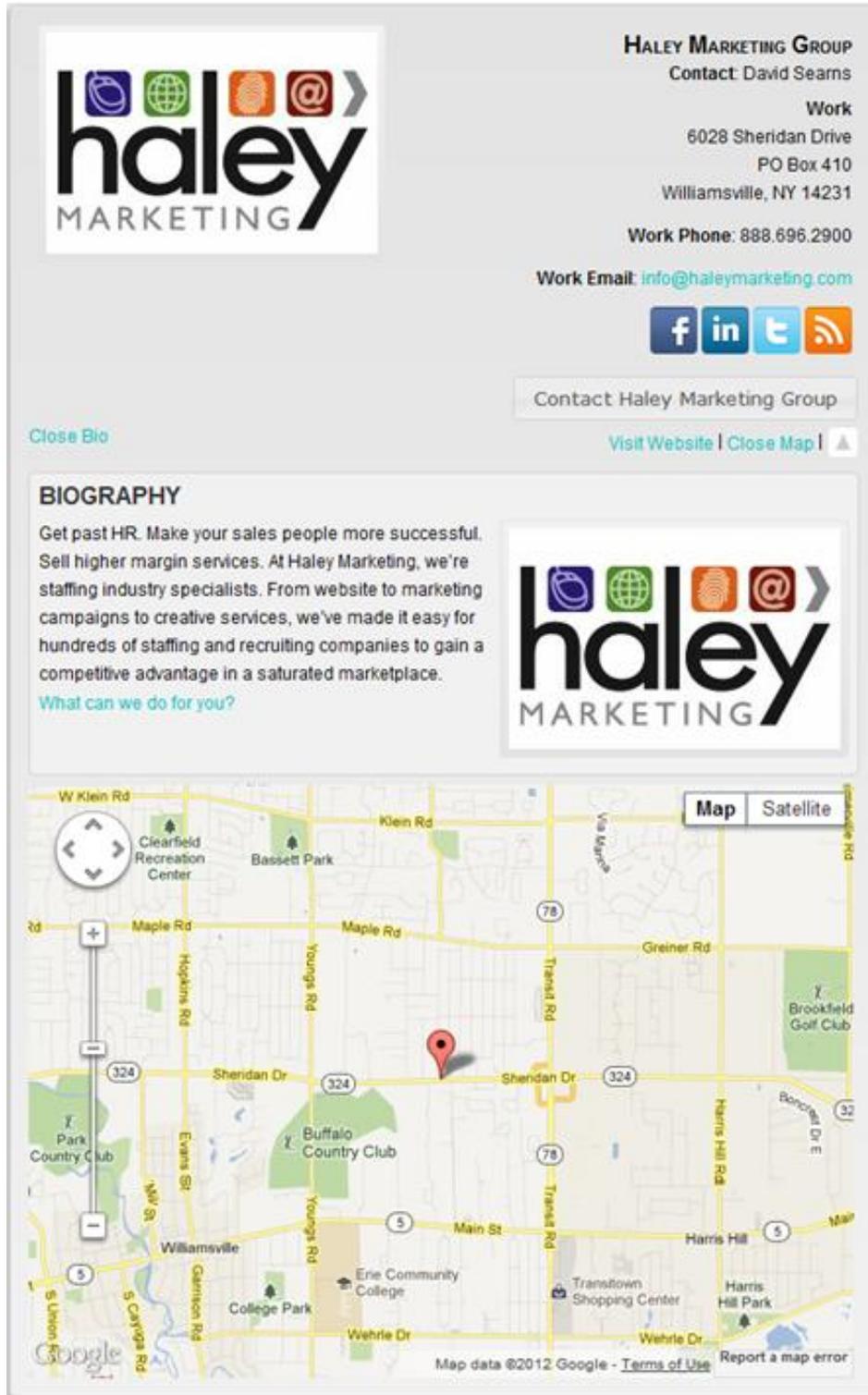
Work Email: info@haleymarketing.com

[f](#) [in](#) [t](#) [RSS](#)

[Contact Haley Marketing Group](#)

[Show Bio](#) [Visit Website](#) | [Show Map](#) | ▲

Opening the bio and map changes the directory listing to look like this:

A screenshot of a directory listing for Haley Marketing Group. The listing includes the company logo, contact information for David Searns, social media icons for Facebook, LinkedIn, Twitter, and RSS, and a "Contact Haley Marketing Group" button. Below this is a "BIOGRAPHY" section with text about HR services and a "What can we do for you?" link. To the right of the biography is a smaller version of the company logo. At the bottom is a Google Map of the Williamsville, NY area with a red pin marking the company's location. The map shows streets like Sheridan Dr, Youngs Rd, and Main St, and landmarks like Buffalo Country Club and Erie Community College.

Adding Members

The Member Directory uses a WordPress plug-in called Connections. You will use Connections to add, update and remove listings.

- Select **Connections** from the main navigation.
You will be directed to a page showing more information about the plug-in.
- From here, select **Manage**.
You will see a listing of all directory listings. It is important to understand that the Member directory and the Industry Partner directory are managed from the same place. The categorization of the listing is what determines the page on which it is displayed.
- To add a new member, press the **Add New** button at the top of the page.
This will take you to a blank entry form. Any information entered here will display on the directory listing.
- Before you Add the Entry, verify that:
 - You have selected to publish as an Organization
 - You have selected at least one category. You may want to select sub-categories as well. Select Association Members to publish to the Members page. Select Industry Partners to publish to the Industry Partner page.
- When you are ready to publish the directory listing, press the **Add Entry** button.

Updating Members

Similar to adding a new member, you can update members:

- Select **Connections** from the main navigation.
- From here, select **Manage**.
- Click on the directory listing that you would like to update to be taken to the **Edit Page**.
- When you have made all of your changes, press the **Update** button.

Deleting Members

You have the option to either delete a member or just stop displaying the listing:

- Select **Connections** from the main navigation.
- From here, select **Manage**.
- To prevent a listing from displaying without deleting it, hover over on the directory listing that you would like to stop showing. Then, click **Unapprove**. This will remove the listing from your site, and move the record to the Moderate area of Connections.
To reinstate the listing, simply go to the Moderate area (just below the Connections heading), hover over on the directory listing and click **Approve**.
- To permanently delete a record, hover over on the directory listing that you would like to stop displaying. Then, click **Delete**. This will permanently delete the record. To reinstate this information, you would have to create a new member entry.

Managing Events and Calendars

Your site includes an Event Planner that will allow you to manage free and paid events. It integrates with PayPal so you can accept payment online if you choose as well.

Featured events are displayed on the homepage:

Featured Events

- Jul 20 **Disability Best Practices: Advantage Staffing Firms!**
- Jul 31 **EMPOWER your organization to be proactive!**

Upcoming events are featured on the sidebars on all sub pages.

Upcoming Events

- Jul 20 **Disability Best Practices: Advantage Staffing Firms!**
- Jul 31 **EMPOWER your organization to be proactive!**

All events can be seen on the News & Events page under the Events category as a list or on a calendar.

July 2012

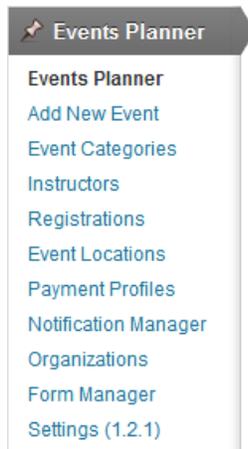
Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Getting Started with Event Planner

Before you can add events, there is some setup required. You must add any event categories, locations, etc., before you will be able to use them in an Event to be schedule.

Select **Event Planner** from the main navigation.

You will be directed to a page listing of all events currently entered and addition menu options will open under the Event Planner in the main navigation:



- **Event Categories** – You may choose to categorize your events. You need to enter an event category here so that you can select the category when scheduling your event.
- **Instructors** – If you will be promoting education events, you may want to enter the name and a brief bio of your instructors. You need to enter the instructor here so that you can select that person when scheduling your event.
- **Registrations** – You may manual enter registrations to events here. You can also see all registrations that have come in online as well.
- **Event locations** – You may provide locations, addresses, and directions for your events here. You need to enter the location here so that you can select it when scheduling your event.
- **Payment Profiles** – Haley Marketing Group will setup your PayPal Express Checkout profile on your behalf during setup. We do not recommend changing anything in this section until you are more familiar with the site.
- **Organizations** – If your events are presented or sponsored by another organization, you can set up the name and a brief description to be used on your events. You need to enter the organization here before you can select it when scheduling your event.

Scheduling Events

The Events calendar uses a WordPress plug-in called Event Planner. You will use Event Planner to schedule events on your site.

- Select **Event Planner** from the main navigation.
You will be directed to a page listing all events currently entered.
- To add a new event, press the **Add New Event** button at the top of the page.
This will take you to a blank entry form.
- Enter the name of the event and a description, as well as a synopsis.
- Scrolling down, add the dates for the event and registration availability.
- Add times and prices. Note that you must enter a price, even for free events. You do not have to display the amount on free events though.

Dates

User can only register for **one day** .
 User can register for **one or more days** .
 User automatically registers for **all days** .
 A class/course.

Start Date	End Date	Regis. Starts On	Regis. Ends On	Capacity
07/26/2012	07/26/2012	07/01/2012	07/26/2012	1000

Recurrence helper

Times and Prices

Is this a free event? Yes No

If the user can register for more than one day, do the following prices apply to: The Whole Event Per Day

Times (optional)

Start Time	End Time	Hide
2:00 PM	3:00 PM	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes

At least one price is required, even if it's a free event. Enter price in 0.00 format.

Prices

Price Label	Price	Min.	Max.	Show 0?	Hide
Free!	0.00	<input type="checkbox"/> 0 <input checked="" type="checkbox"/> 1	<input type="checkbox"/> 0 <input checked="" type="checkbox"/> 1	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes

Type: Attendee Other
 Discountable? No Yes
 Note to Customer (Optional)

- Under Settings, you may select the location, payment choices, organization hosting the event, etc.

Settings

General | Forms | Display & Other Options | Messages | Discounts | Attendee List

Event Location:

Room, suite...
Enter more specific information about the location.

Payment Choices: PayPal Express Checkout

Organization hosting the event:

Email message to use for confirmations: No email messages found. Please go to Events Planner > Notification Manager to create notifications.

Replace the default email?:
If no, the message in the notification will get appended to the default confirmation email.

Presenter, instructor, Trainer...: David Searns

- On the right side of the page, select the categories and options.

Event Categories

All Event Categories | **Most Used**

Free Webinar

[+ Add New Event Category](#)

Options

Status:

Registration Availability:

NOTE: You must publish this post for users to be able to see it.

- When you are ready to publish the event, press the  button.

Managing Advertisements and Sponsors

Your site includes advertising management that will allow you to place, create and manage advertisements on your site.

Featured events are displayed “below the fold” (i.e., by scrolling down) on the homepage and all subpages. There is also an optional scrolling ad feature at the bottom of all subpages.

There are three standard sizes of ads used on the site:

Small: 100 x 100

Medium: 300 x 100

Large: 300 x 200

While other sizes can be used, we strongly suggest that you use these to ensure the integrity of the site.

Getting Started with AdRotate

The plug-in used to manage ads is called AdRotate and it provides many advanced options as well as tracking and reporting on your site ads. We will only cover the basics of creating and placing an ad here. Please refer to the plug-in documentations for additional information. You may also choose to have Haley Marketing Group create and place your ads for a reasonable fee.

- Select **AdRotate** from the main navigation.
You will be directed to a page listing of all ads currently entered.
- For each ad you can see:
 - ID:** the unique identifier used when placing ads on pages
 - Show from:** the start date of the range of dates when the ad will be displayed
 - Show until:** the end date of the range of dates when the ad will be displayed
 - Weight:** ads can be given more "weight" to give them more priority over other ads
 - Impressions:** the total number of times the ad has been viewed
 - Today:** the number of impressions today
 - Clicks:** the total number of times the ad has been clicked
 - Today:** the number of clicks today
 - CTR:** clicks divided by impressions, expressed as a percentage

<input type="checkbox"/>	ID	Show from	Show until	Title	Weight	Impressions	Today	Clicks	Today	CTR
<input type="checkbox"/>	8	May 01, 2012	May 01, 2013	Ad - Small - Report	6	2422	9	--	--	--
<input type="checkbox"/>	9	May 01, 2012	May 01, 2013	Ad - Medium - Report	6	1552	9	--	--	--
<input type="checkbox"/>	10	May 01, 2012	May 01, 2013	Ad - Large - Report	6	576	9	--	--	--
<input type="checkbox"/>	11	July 06, 2012	August 06, 2013	Lunch with Haley - Report	6	8	8	2	2	25 %

Creating and Ad

The ads on the site are managed using a WordPress plug-in called AdRotate. You will use AdRotate to add, update and remove events from your site.

- Select **AdRotate** from the main navigation. You will be directed to a page listing of all ads currently entered.
- Click Add New from the top menu

New Ad

The basics (Required)	
Title:	<input type="text" value="Your Ad Title"/>
AdCode:	<div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <pre></pre> </div> <div style="flex: 1;"> <p>Options: %id%, %image%, %link% HTML/JavaScript allowed, use with care!</p> <p>Basic Examples: Clicktracking: <pre>This ad is great!</pre> Image: <pre></pre> Combination: <pre></pre></p> <p>Advanced Example: Clicktracking: <pre>Text Link Ad!</pre></p> </div> </div>
Display From:	<input type="text" value="08"/> / <input type="text" value="July"/> / <input type="text" value="2012"/>
Until:	<input type="text" value="08"/> / <input type="text" value="July"/> / <input type="text" value="2013"/>
Activate:	<input type="text" value="Yes, this ad will be used"/>

- Enter a title for your advertisement. This will be used in reports to identify the ad.
- Copy and paste the following AdCode:

```
<a href="%link%" target="_blank"></a>
```

This AdCode will link the URL and display the image that you will define in the next few steps. There are more advanced uses for the AdCode but this will create your basic ad. If you want to place text below the image in your ad, you may copy and paste the following AdCode instead:

```
<a href="%link%" target="_blank"></a><br /> Enter your text here.
```

- Enter the starting and ending dates of your ad. Your ad will not be displayed before or after these dates, respectively.
- Make sure your ad is activated. It should say "Yes, this ad will be used."

Advanced (Everything below is optional)

Advertiser:
Must be a registered user on your site with appropriate access roles.

Clicktracking: Enable? url:
Use %link% in the adcode instead of the actual url.
 For a random seed you can use %random%. A generated timestamp you can use.

Banner image: Media:
 - OR -
 Banner folder:
Use %image% in the code. Accepted files are: jpg, jpeg, gif, png, swf and flv. Use either the text field or the dropdown. If the textfield has content that field has priority.

Weight: 2, Barely visible
 4, Less than average
 6, Normal coverage
 8, More than average
 10, Best visibility

Maximum Clicks: Disable after clicks! Leave empty or 0 to skip this.

Maximum Impressions: Disable after impressions! Leave empty or 0 to skip this.

Expected Clicks: Set a target or milestone for clicks. Shows in the graph. Leave empty or 0 to skip this.

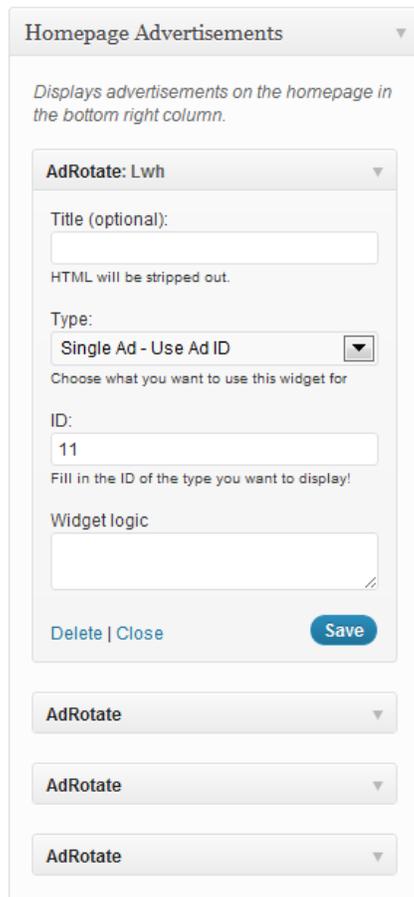
Expected impressions: Set a target or milestone for impressions. Shows in the graph. Leave empty or 0 to skip this.

- In the Advanced section, check the **Clicktracking Enabled** checkbox and enter the URL that you want linked to your ad.
- The Banner Image will be the image that you are using for the advertisement. Press the **Select Image** button. Using the WordPress Media Browser, either upload or select the image to be used. When adding your image you can upload it as normal. Please refer to the standard ad image sizes above. For Alignment you must choose "none" and for Size you choose "Full size." *If you do not use these settings, your image will not be added to the ad and will not work.* Be sure to Press the **Insert into Post** button to select the image.
- Press the **Save Ad** button. Your ad is created, but is still not displayed on your site. You must follow the instructions under Placing an Ad to complete the process.

Placing an Ad

Once you have created an ad, you can place it on the site using the widgets that have already been set up for ads.

- Note the AdCode of the ad you will be placing on your site.
- Select **Appearance**, then **Widgets** from the WordPress Admin Menu
- Ads appear in three places on the site:
 - Homepage
 - Sidebar
 - Bottom Slider
- Select one of these areas and it will open.
- You will see the AdRotate Widgets, select one and it will open.



The screenshot shows the 'Homepage Advertisements' widget configuration. It includes a description: 'Displays advertisements on the homepage in the bottom right column.' The configuration fields are:

- AdRotate:** Lwh
- Title (optional):** (empty text field)
- HTML will be stripped out.** (checkbox)
- Type:** Single Ad - Use Ad ID (dropdown menu)
- Choose what you want to use this widget for** (checkbox)
- ID:** 11 (text field)
- Fill in the ID of the type you want to display!** (instruction)
- Widget logic** (empty text area)
- Buttons:** Delete | Close and Save

 Below the configuration area, there are three 'AdRotate' widget slots, each with a dropdown arrow.

- Enter the AdCode into the ID of the AdRotate Widget
- Press the Save button.
- Your ad will now display on the site.

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.

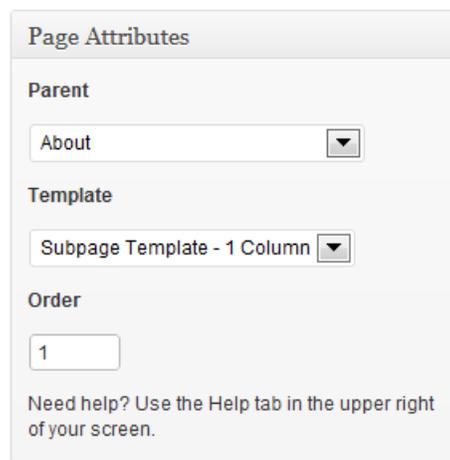
Advanced Topics

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.

A screenshot of the "Page Attributes" box in WordPress. The box has a title "Page Attributes" and three sections: "Parent" with a dropdown menu showing "About", "Template" with a dropdown menu showing "Subpage Template - 1 Column", and "Order" with a text input field containing "1". At the bottom, there is a link: "Need help? Use the Help tab in the upper right of your screen."

Updating the Featured Video on the Homepage

The Featured Video on the homepage can be changed. To do this, simply update the page named “Featured Video.”

You will need to use the Media Library to embed the new video on the page and include a headline and descriptive text. Keep in mind that there is limited space on the homepage for this content. Refer to the **Using the Rich Text Editor Toolbar** section for instructions for *Inserting/Editing Images & Media*.

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

Updating the address and contact information on the homepage

Access via the WordPress Admin Menu: Appearance then Widgets

Then select: Company Information (top right) and press the down arrow to open

- Update the address displayed on the home page
- Include `<p class="phone">716.123.4567</p>` to display the small phone icon
- Basic HTML is allowed

Updating the Social Media links on the home page

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:

```
<li><a href="#" target="_blank" class="linkedin">Linked In</a></li>
```

Becomes:

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

- 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, this:

```
<li><a href="#" target="_blank" class="youtube">You Tube</a></li>  
<li><a href="#" target="_blank" class="pinterest">Pinterest</a></li>
```

Becomes:

```
<!--START COMMENT  
<li><a href="#" target="_blank" class="youtube">You Tube</a></li>  
<li><a href="#" target="_blank" class="pinterest">Pinterest</a></li>  
END COMMENT-->
```

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.

Setting up your PayPal account

To accept payments online, you should set up an account with PayPal. To do this, go to:

1. <https://www.paypal.com/webapps/mpp/merchant?nav=2>
2. Select the option that you prefer (Standard, Advanced or Pro). You only need Standard for you new site.
3. Press Create New Account.
4. Respond to the prompts on the screen for your business location and language preference. Then, press Create New Account.
5. Create your login by completing all of the questions presented and continue to page two.
6. Enter your company information by completing all of the questions presented.
7. Review the User Agreement and Privacy policy and press Agree and Continue.
8. You will be presented with a confirmation page.
9. Open your email and find PayPal Confirmation email with the subject line "Welcome to PayPal".
10. Open the email and activate your PayPal account by confirming your email address and logging in with the password you created in step #4 above.
11. You will be taken to the My Business Setup page in PayPal.
12. From here, select Profile, and then My Selling Tools.
13. Under the section called Selling online, click on Update next to API Access.
14. Click Request API Credentials from the grey box on the right.
15. Review the API License Agreement and press Agree and Submit.
16. Copy and paste the following information into the "State Association Site – Information Needed" document or submit it to your Haley Marketing Group Project Manager for set up:
 - PayPal Email Address:
 - API Username:
 - API Password:
 - API Signature (long string):
17. Press Done.

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.
- **Events Planner** - <http://www.wpeventsplanner.com/>
Event management plug-in with PayPal registration.
- **Connections** - <http://connections-pro.com/>
Address book and directory manager.
- **Connections cMap Template** - <http://connections-pro.com/templates/cmap/>
Adds a map view and search form to Connections directory.
- **s2Member** - <http://www.s2member.com/>
Membership management plug-in that integrates with PayPal® Standard for businesses.
- **Contact Form 7** - <http://contactform7.com/>
Contact form generator.
- **AdRotate** - <http://www.adrotateplugin.com/>
Advertisement manager allowing you to easily place, create and manage your ads.

Appendix B: Available Icon Classes

The following Icon Classes are available for use in the State Association site. These are useful when denoting phone numbers, email addresses, etc. To add the icon inline with text, simply add the class to your paragraph or other tag:

```
<p class="IconClassName">Text to be displayed</p>
```

For example:

```
<p class="phone"> Toll Free: 716-123-4567</p>
```

Renders:

 **Toll Free: 716-123-4567**

Icon	Source Code
 Alert	<pre><p class="alert">Text here</p></pre>
 Email	<pre><p class="email">Text here</p></pre>
 Find	<pre><p class="find">Text here</p></pre>
 Help	<pre><p class="help">Text here</p></pre>
 House	<pre><p class="house">Text here</p></pre>
 Info	<pre><p class="info">Text here</p></pre>
 Link	<pre><p class="link">Text here</p></pre>
 Page	<pre><p class="page">Text here</p></pre>
 Phone	<pre><p class="phone">Text here</p></pre>
 Print	<pre><p class="print">Text here</p></pre>
 Star	<pre><p class="star">Text here</p></pre>
 Talk Bubble	<pre><p class="talk-bubble">Text here</p></pre>