B'nai Sholom Website

Webmaster's Guide

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Thanks to input from:

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Contents

Goal of This Document

The goal of this document is to provide quick steps to perform some of the general and specific tasks to update and maintain the website.

Logon to make changes.

bnaisholomalbany.org/wp-admin/

Passwords

Our website is an ongoing target for hackers. Please maintain tight security of your password and make it as complicated as you can tolerate. Use a combination of Capitals, lower case, numbers, and special characters.

This is the screen that will show when first logging in
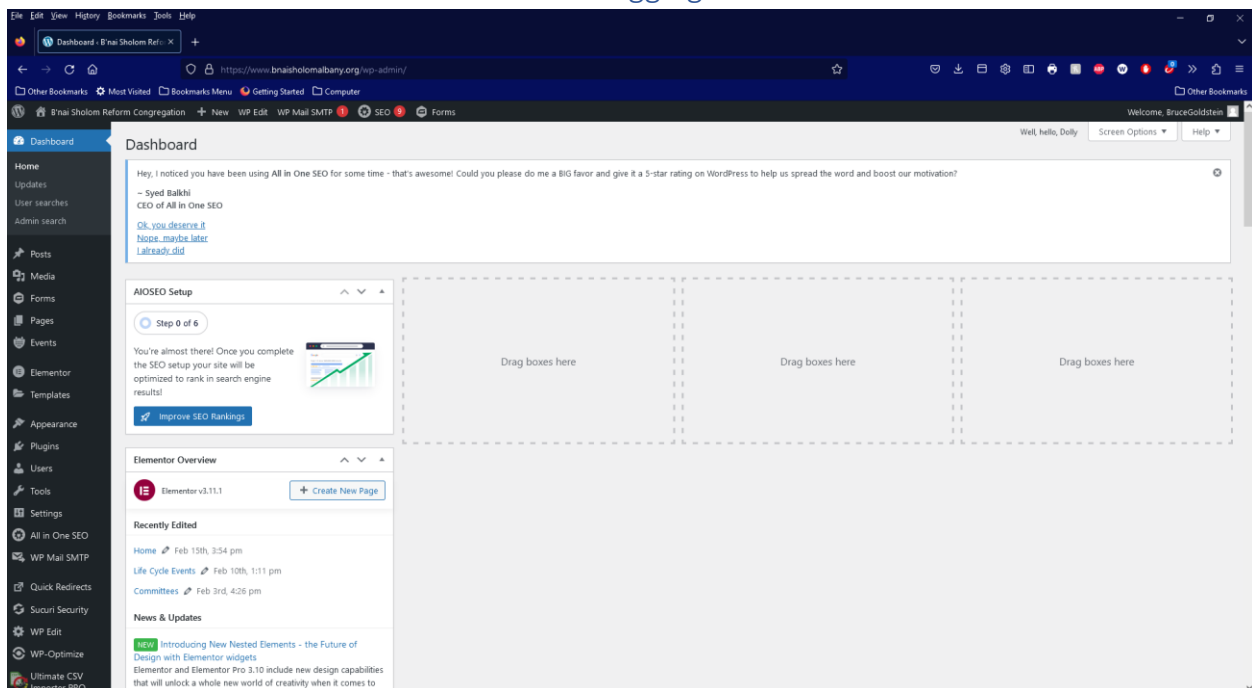
Using the Elementor Editor

- The hamburger at the top left contains the EXIT (usually after performing the 'Update' which is way at the bottom of the Elementor dashboard.
- Click on the 'pen' on the section of the page you wish to Edit.

Below is the screen showing the editing. Make your changes on the left side. Once you make any edit, the **UPDATE** button will turn green.
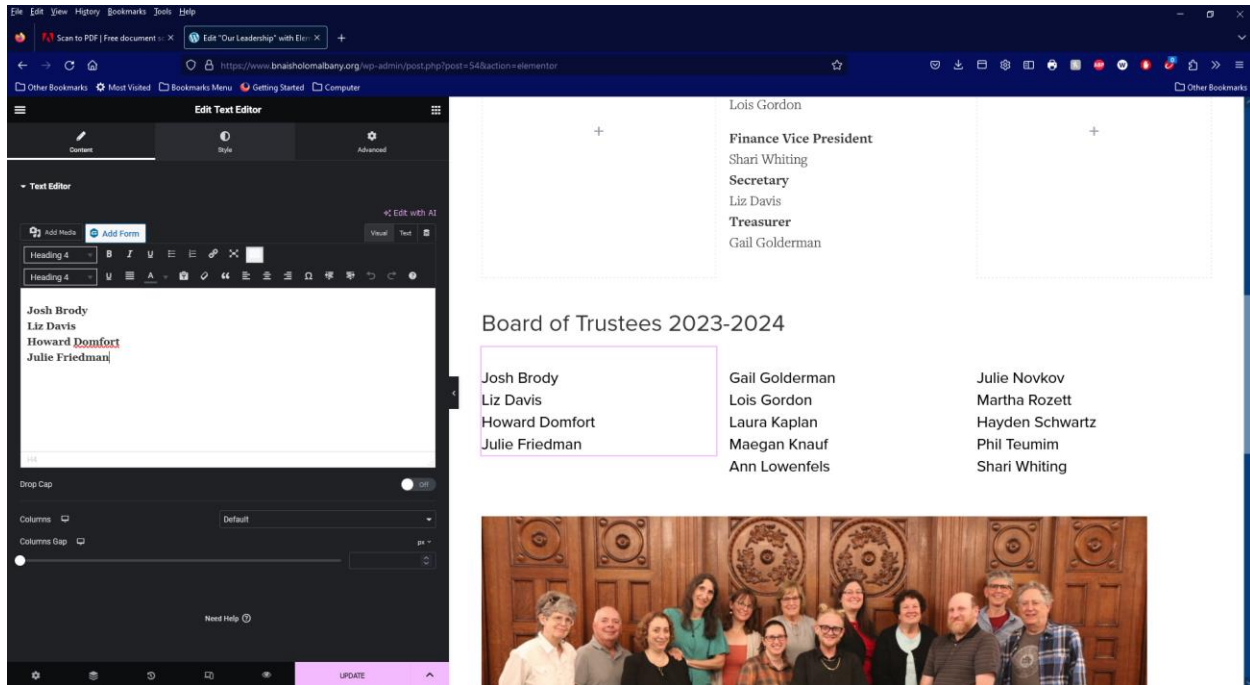
Contact and Office Hours Section of each Page

To edit the contact information at the bottom of the page:

1. Go to the Dashboard
2. Appearance
3. Customize
4. Synagogue Contact Information (and office hours)

> Office hours:
> Tuesdays-Fridays, 9:30 am - 4:30 pm
> Closed Mondays

Pictures

- Pictures should be in JPG format. (PNG involve extra steps to convert to jpg)
- Pictures cannot EXCEED 2500 bytes in size
- When uploading pictures, fill in the ALT Text to describe the picture for our visually impaired viewers.

Picture Alignment

For example, in the "Our Community" section of the home page, the following is the process to change the picture alignment:

1. There is a pink box that represents 'Edit Column' in the upper left just above the picture.
2. CLick on it
3. Find the Vertical Align and change from the default to 'Middle'
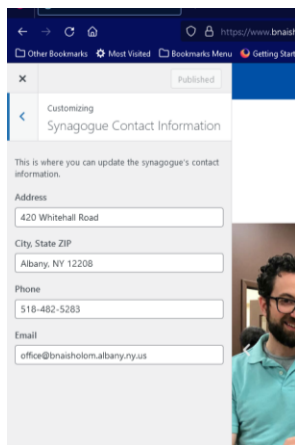
The Homepage Picture Rotation

Adding a Picture to the Image Carousel

1. Go to the Homepage (from the dashboard, ➔Visit Site)
2. Click 'Edit with Elementor'
3. There is a small 'pen' symbol on the upper right corner of the picture on the right side. Click on the pen.
4. On the left side of the screen there are thumbnails of all the pictures in the rotation. Click anywhere in this section (there is a 'pen' symbol which can be clicked on)
5. You can delete a picture; drag to change the order; or add another picture.
   a. To add a picture, click on "Add to Gallery" and go through the process to upload a picture.
   b. At the bottom of the dashboard on the left there is an 'Update' button. Changes will only be permanent if 'Update' is activated.

Homepage Coming Up Section

The "Coming Up' section of the homepage is controlled by Events that have the Event Category "Featured" checked.

If a flyer/picture is wanted to show on the homepage:

1. Edit the event and on the lower right column, there is a box where you can click on **Set Featured Image** which will allow you to select the media you want.

Note, though, that the image doesn't appear in place of the name of the event and date/time, it will appear above it.

1. Events that involve payments/registration:
   a. Duplicate an existing "form" and change its title.
   b. Manipulate the form to add picture (flyer), payment amount, etc.

2. Events not needing registration/payment
   a. Edit the Event to be 'Featured'

Homepage News and Notes Section

Use this section for Flyers that are not calendar related.

If the flyer contains clickable URLs:

1. Create or use the PDF formatted version of the flyer
2. Add the PDF to Media
3. Save the URL of the flyer.
4. Add the PDF and specify to Custom LINK URL which you saved when the media was uploaded.

Adding a New Bulletin

Adding a New Bulletin (Same Year)

1. From the Dashboard insert the pdf using Media
   a. Click on Media
   b. 'Add New'
2. On the right, click on 'copy URL to clipboard'
3. Go to the Bulletin page.
4. Edit the page using Elementor Editor
5. Type in the Month name above the previous month
6. Highlight and press the 'link' symbol and copy in the URL of the PDF file
7. Press 'Update'
8. Save the WORD source as it may be needed for other B'nai Sholom processes (example: Facebook, etc)

Adding a New Bulletin (New Year)

1.

Adding a Press Release (News)

Note: Picture(s) must be added separately. Download the picture from the email and save it.

1. Go to the News Page
2. Click on the first press release that is at the upper portion of the page.
3. Click on "Edit Post"
4. Click on 'Add New' (on the line that says "Edit Post"
5. Copy the Title from the WORD document.
6. Copy the remainder of the Press Release but NOT the ending which is below:

****

Founded in 1971, B'nai Sholom Reform Congregation in Albany is a home for contemporary Reform Judaism in the Capital Region. Nearly 130 diverse households from eight counties seek religious, educational and social fulfillment at B'nai Sholom. For information about B'nai Sholom and the benefits of belonging, visit

7. Remove the extra line(s) that is between each paragraph and/or page separator(s)
8. Click on Media and load the picture (most press releases will have a single picture)
9. Click on the picture
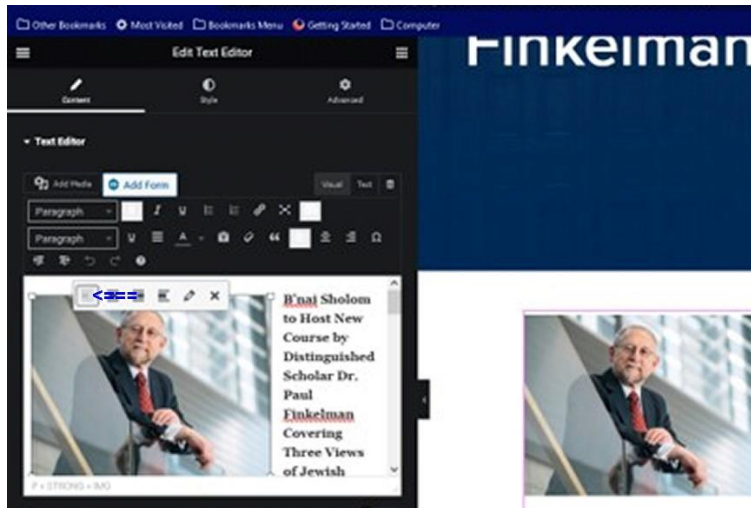
10. Click on the symbol (pointed by the Blue Arrow) that represents "embed on left with the words on the right.
11. Click on the 'pen symbol' and set the size to medium.
12. "UPDATE" and exit Elementor.

Adding Photo Collages to a Web Page

1. On the Dashboard, click Pages.
2. Find the page you want, hover over it and click Edit with Elementor.
3. The page should have a box at the bottom that says Drag Widget Here. Go to that box and click on the + sign.
4. At left, choose the number and configuration of columns that you want and click on it.
5. Click on the + sign in the column where you want to photo to go. Then go to the left side of the screen and drag the Image box to the + sign.
6. Go back to the left side, hover over the image box at top and you will see Choose Image come up. Click on that.
7. You will see a box on the right that says Upload files. Click on that.
8. Then click on select files. Find the photo you want and drop it in the box.
9. You will see the photo at the far right.
10. Hit Select at bottom right.
11. If the photo is too big, you can size it at the left. You can also add the caption at the left by typing it in.
12. When you see the photo and caption looks the way you want it to look, hit Update on the left.

Pointers to Documents

Some of the 'clickable' documents do not have an associated webpage. For example take a peek at the Cemetery Page where the information for cemetery plots show. To get this to work do the following:

1. Convert to PDF format (if in WORD, 'save as' and change to pdf type
2. Go to the dashboard and select Media and 'Add New'
3. Upload your item and after uploading, highlight your document and on the lower right there is a place to 'Copy to Clipboard'. Click on it.
4. Go to the page you desire to make the change and 'Edit'
5. Add or highlight the words you want to be associated with the document.

6. Click on the 'link' icon and 'paste' in the link from the media screen.

Web Calendar Maintenance

Add an event

A. Select "Events" along the left side of the page, then select "Add Event".

B. Enter the name of the event in the "Add title" field.

C. Under "When" on the right side of the page:
   i. Select the date range in the "Event Dates" field. Click the same date twice to enter one day (not a range of days).

   ii. Select the starting time in the "Event Times" field. Use the same time in both fields to just specify a starting time. Otherwise, enter the ending time in the next field.

D. Select the event category in the "Event Categories" field. This is below the "When" section on the right side of the page.

E. Select "Publish" on the right side of the page.

Add a recurring event

A. Select "Events" along the left side of the page, then select "Recurring Event".
B. Select "Add Recurring Event" along the top of the page.

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C. Enter the name of the event in the "Add title" field.

D. Scroll down to "Recurrences"

    i. Enter the time of the event under "Event Times".

    ii. Click inside the "Select date range" field and select the starting and ending dates of the events.

    iii. Next to "This event repeats", select the appropriate recurrence from the drop-down menu. If you select "weekly", then select the day of the week. If you select "Monthly", then enter the day of the month of the recurring event.

E. Select the event category in the "Event Categories" field on the right side of the page.

F. Select "Publish" on the right side of the page.

Edit an event

A. Edit a stand-alone event

    i. Select "Events" along the left side of the page.

    ii. Scroll to find the event you wish to edit.

    iii. Hover the cursor over the title of the event, then select "Edit" from the options listed under the title.

    iv. Make the changes.

    v. Select "Update" along the right side of the page.

B. Edit a single event that is part of a series

    i. Select "Events" along the left side of the page,

    ii. Scroll to find the event you wish to edit.

    iii. Hover the cursor over the date of the event, then select "Detach".

    iv. Confirm that you wish to detach the event by selecting "OK" in the dialog box.

    v. Scroll to find the event that you wish to edit.

    vi. Hover the cursor over the title of the event, then select "Edit".

    vii. Make the changes.

    viii. Select "Update" along the right side of the page.

C. Edit a series of events

    i. Select "Events" along the left side of the page,

    ii. Scroll to find the event you wish to edit.

    iii. Hover the cursor over the title of the event, then select "Edit".

    iv. Make the changes.

    v. Select "Update" along the right side of the page.

Delete an event

A. Delete a stand-alone event

    i. Select "Events" along the left side of the page.

    ii. Scroll to find the event you wish to edit.

    iii. Hover the cursor over the title of the event, then select "Trash" from the options listed under the title.

B. Delete a single event that is part of a series

    i. Select "Events" along the left side of the page,
    ii. Scroll to find the event you wish to edit.
    iii. Hover the cursor over the date of the event, then select "Detach".
    iv. Confirm that you wish to detach the event by selecting "OK" in the dialog box.
    v. Scroll to find the event that you wish to edit.
    vi. Hover the cursor over the title of the event, then select "Trash".

C. Delete a series of events

    i. Select "Events" along the left side of the page,
    ii. Scroll to find the event you wish to edit.
    iii. Hover the cursor over the title of the event, then select "Trash".

Other features

A. Make a "featured" event

    i. Add the event as described in section I.
    ii. When selecting the Event Categories, also select "Featured".
        Note: If the event is a recurring event, make the first event a separate event and select "Featured". Then add a separate recurring event for the remaining occurrences. (Otherwise, we will end up with multiple duplicate events on the home page.)

Attach a flyer or additional materials to an event

These will display in the 'Coming Up' section on the home page.

i. Add the event as described in section I.
ii. In the box below, either manually add the additional information or select the paper clip icon to attach a flyer or other material.
iii. If you want to have jpg point to a single website, then Edit the event and under the Quick Page/Post Redirect
    o Check the box for Show Redirect URL in Link
    o Fill in the URL the Direct / Destination URL box

Stand-Alone pages used only by Facebook

1. Go to the dashboard.
2. Go to Pages
3. 'Add' a new page.
4. Title not important, just something unique like 'April Bulletin Ref1'.
5. Copy in the desired selection from the WORD source.
6. Verify that there are no extra blank lines.
7. 'Publish' or update as appropriate.
8. Copy the URL created that is close to the top of page labelled as '**Permalink:'** (Top left)
9. Send or use the link in Facebook (or whatever)

Payment Forms

To create a new form (new a new one for each class or event that involves a fee):

1. Duplicate from an existing form and then edit.
2. Go to settings for the duplicated form and change the FORM name
3. Set the price(s) for the class or event.
4. Copy the calculation to include the Credit Card Fee (This is a little complicated):
   a. Click on the 'Additional Contribution' line.
   b. Click on 'Pricing Fields'
   c. Click on 'Product' and drag to left
   d. Click on Field Settings
   e. Verify that 'Field Type' is 'Calculation'.
   f. 'Check Mark' for 'Disable Quantity' Field
   g. 'Insert Merge Tag"
   h. 6. Copy in and modify the calculation(s).
   i. Click on 'Validate Formula' as a sanity check.
   j. Once the calculation is complete, to find again go through the following:
      i. Go through the FORM and find 'Product Name' just after the Convenience calculation section
      ii. Find 'General'

      iii.
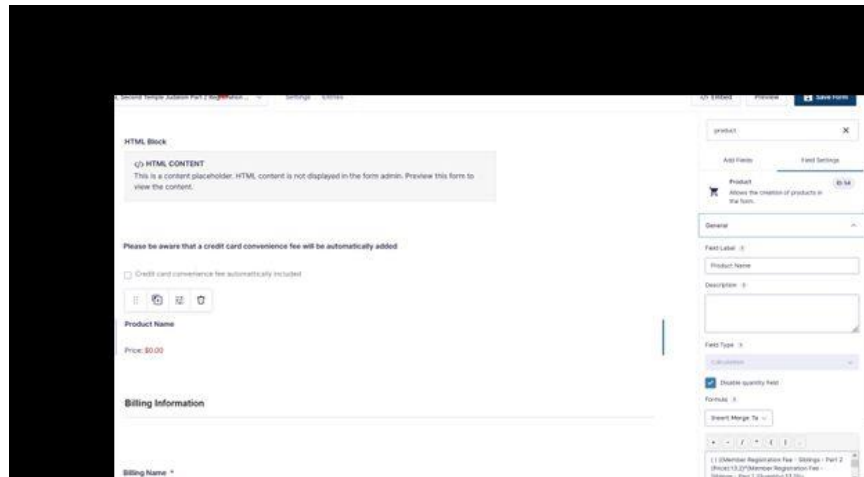
5. Set up the feed to PayPal.

Form Settings

Key Fields and the fixed data

	Email Service	SendGrid
Notifications:	SendTo	donations@bnaisholom.albany.ny.us
Notifications:	From Email	office@bnaisholom.albany.ny.us
Notifications:		Check "enable conditional logic"

Setting: PayPal	Transaction Type	Donations
Setting: PayPal	PayPal email address	treasurer@bnaisholom.albany.ny.us
Setting: PayPal	Payment Amount	Form Total
Setting: PayPal Other settings	Billing Information	Use dropdowns to define items like Billing First Name, etc
Setting: PayPal Other Options		Check all the boxes
Setting: PayPal Other Options	Process feed if all match	Check the box
Setting: PayPal Other Options	Payment method is	Use dropdown and use Pay by Credit Card..
Additional Contribution to Cover Credit Card Fee		((({Member Registration Fee - Siblings - Part 2 (Price):13.2}*{Member Registration Fee - Siblings - Part 1 (Quantity):13.3})+ ({Non-Member Fee - Siblings - Part 2 (Price):40.2}*{Non-Member Fee - Siblings - Part 2 (Quantity):40.3}))*.0199) + .49

To find the calculation field in the form (It is difficult)

1. Click on the 'Additional Contribution' line
2. Click on 'Pricing Fields'
3. Click on 'Product'
4. Click on Field Settings
5. Verify that 'Field Type' is 'Calculation'.
6. 'Check Mark' for 'Disable Quantity' Field
7. 'Insert Merge Tag"
8. 6. Copy in and modify the calculation(s).
9. Click on 'Validate Formula' as a sanity check.

Attaching the Form to an Event

Most Forms will need to be attached to an **existing** event.

On the event there is an option to add a form. Once clicked on, you can choose the form you wish to be associated with the event. 'Featured' events will end up on the home page

Removing a Button

1. Right Click on the button field you want to remove
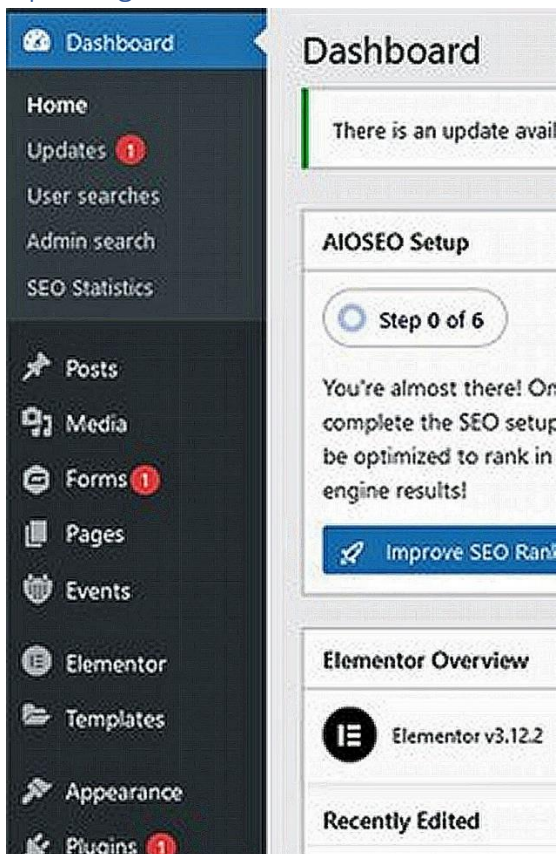2. Click on the 'Delete' in the resulting menu

Little Used Basic Information

Changing default fonts, etc (try not to go here!)

1. Dashboard
2. Appearance
3. Theme
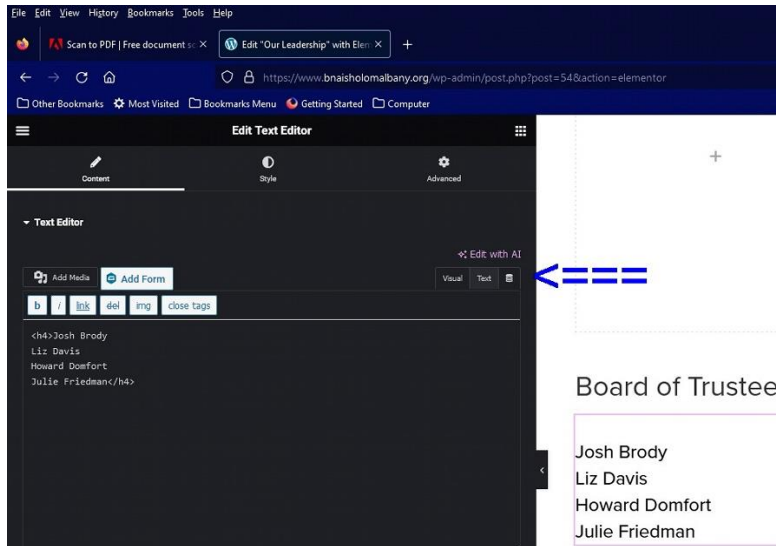4. Theme File Editor (you will receive a very strong warning about changing anything here)

Updating WORD

It is ok to update for those items that do not involve a charge (going to a PRO version)

Lists (pertains to list of officers and maybe elsewhere)

Updating the lists can be a little difficult:

          Josh Brody
          Liz Davis
          Howard Domfort
          Julie Friedman

The best sizing (to conform with the rest of the lists on this page is to use 'Heading 4' which causes everything to be double spaced). To get around the double spacing do the following:

1. Create your list.
2. Change from heading 4 to 'Preformatted'
3. Switch to 'Text' from 'Visual'
4. Change the 'control' information and data to look like the following:

   <h4>Josh Brody
   Liz Davis
   Howard Domfort
   Julie Friedman</h4>

CONTROL Information for the Up Coming section of the homepage.

The setup and control information for the Up Coming section

1. Dashboard
2. Appearance
3. Theme
4. Theme File Editor (you will receive a very strong warning about changing anything here)
5.

Website restoration

If all else fails after making an update with unexpected results that can not be easily recovered (like messed up menus, accordion definitions lost….)

1. Call GoDaddy (480) 463-8773) having the account number and pin number handy
2. Ask for technical assistance with web builder support for WORDPRESS
3. It will take between 15 minutes and several hours to restore (The last time I made the request, the website was back within 15 minutes).
    a. If you can accomplish this without anyone commenting about the website being down, then request that the board double your salary…

Placing this document on the website (unlinked private page)

1. Convert to PDF
2. Go to the Dashboard
3. Find the Page titled "Website Documentation" and edit
4. Delete the only line of information "WordPress Website Webmaster Guide
5. "Add Media"
6. In Media Upload the pdf version you previously created
7. Once uploaded, Insert into the page
8. Click on 'update'

Your Comments Please

Please enter all the positive comments concerning this document (contents and format) in the box below:

Please enter any negative comments in the box below. Make sure that the problem is described in excruciating detail using a number 2 magenta Crayola so that positive action can be taken. Thank you.

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