



Wordpress Basics



ENGENIUS

Your site is live!

We did it together—we got your new site online so the world can see what you are all about. The next step is keeping it up-to-date and active so that it accurately portrays the hard work you are putting into your job everyday!

This manual provides a few basics to help you remember what we went over in your training session, but if you need more help

CONTACT SUPPORT

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Logging In

Accessing the Admin Panel

The back-end of any Wordpress site can be accessed by going to:

_____ /wp-admin
(yourdomainname.com)

You will then see a login screen where you should enter your credentials:

Username: _____

Password: _____

You are now on the Dashboard and from here you can access anything you need to make adjustments to your website.

TIPS & TRICKS

We recommend opening the dashboard in one tab of your browser, and opening your website in the tab right beside it. This way you can easily go back and forth between the two.

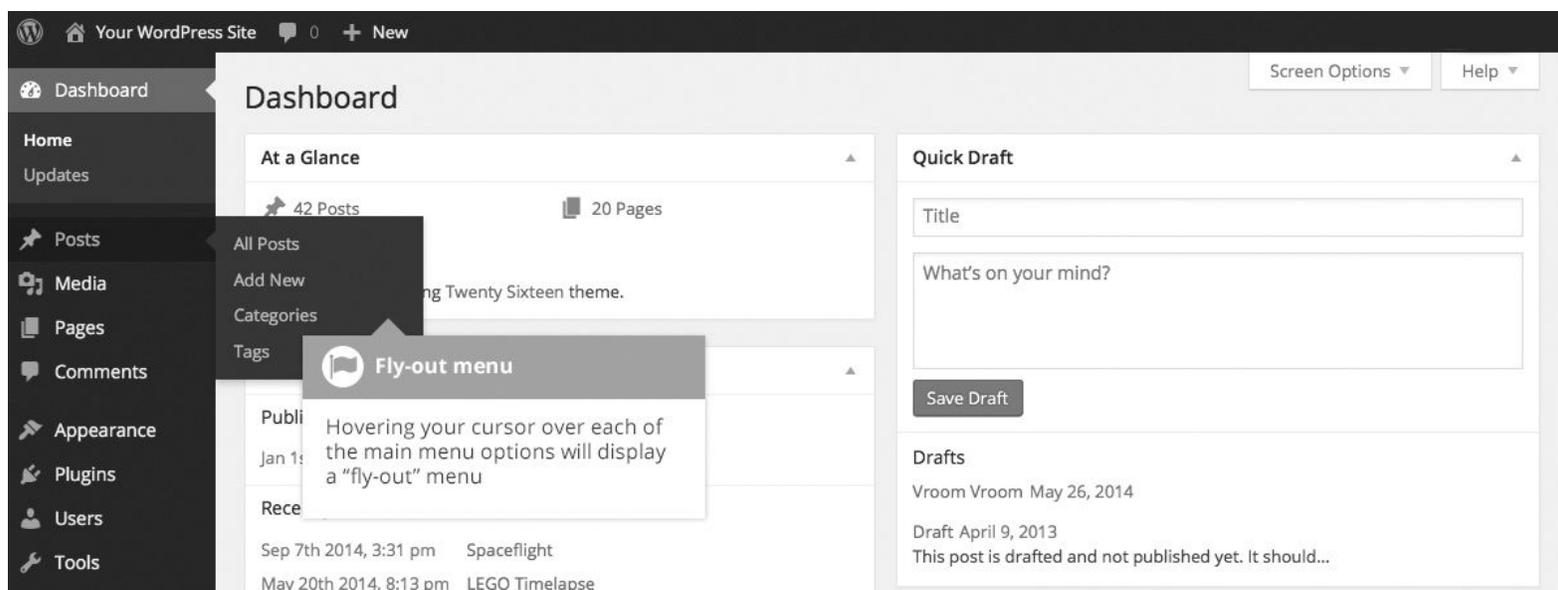
DASHBOARD MENU OPTIONS

The left-hand side of the WP Admin panel list all your menu options. Scrolling over some of those options will also reveal a “fly-out menu” with further options. The options in this left-hand menu will vary depending on the theme used for your site.

On your site, you have content in the following sections:

(check those that apply, based on your training with Engenius)

- ❑ Posts
- ❑ Pages
- ❑ Portfolio
- ❑ Clients
- ❑ Testimonials
- ❑ Events



Posts

Adding a News/ Blog post can be achieved in just 6 simple steps.

1. Hover over POSTS in the left-hand menu, and choose Add New from the fly-out menu.
2. Choose a title for your post and type it in the top space.
3. Type the content for your post in the large text box below the title. You have some basic text editing tools available to you, which should look familiar from other word processing software such as Word.
If you want to paste content from another source (such as a Word document or PDF), that is totally fine. It is just best if you first click on the icon that looks like this:  This will allow you to paste your content in Plain Text mode, erasing any formatting that may not match the formatting of the website.
4. Choose a category. You can add new categories right from the Post page, or you can click on pre-existing categories. If a category is not chosen, the post will appear as “Uncategorized” and gives a less-than-professional air. In some cases, certain categories appear on certain pages, so choosing the category is extremely important. Make note of any category-specific requirements on your site:
5. Add a Featured Image. If featured images have been utilized on your posts, you should add a featured image to all posts. It is best if you can pre-size your photo to match those already used as featured images. The size for your Featured Image photos should be _____px by _____px.
6. Hit Publish in the top right. This will make your new post automatically appear first on the Blog/ News page, and anywhere else posts are programmed to go. On your site, posts appear in the following places:

See the next page for a screenshot of these steps.

Posts (cont.)

Use this space to take notes on anything additional your specific theme requires when adding Posts.

The screenshot displays the WordPress 'Add New Post' editor. On the left is a dark sidebar menu with various options. The main content area features a title field, a rich text editor with a toolbar, and a text area. On the right is a settings sidebar with sections for 'Publish', 'Categories', 'Tags', and 'Featured Image'. Six numbered callouts are overlaid on the image:

- 1**: Points to the 'Add New' link in the sidebar menu.
- 2**: Points to the 'Enter title here' text field.
- 3**: Points to the main text editor area.
- 4**: Points to the 'Categories' section in the right sidebar.
- 5**: Points to the 'Featured Image' section in the right sidebar.
- 6**: Points to the 'Publish' button in the right sidebar.

Pages

Most of your pages are built using a Visual Composer. In the past, when you wanted to have multiple columns, or a button, or any other feature on a page, a series of codes were needed to achieve this. Today, Visual Composers allow you to build and edit sites with much less code, and a much better preview of what the actual live page will look like.

Because each site is different, we will give you personalized training on your Pages. Use this area to take notes:

Pages (cont.)

Portfolio

The Portfolio post type is used on sites which need to showcase project work. Most Portfolios consist of photography and descriptions of the project. Each site is a little different, but typically you will need to follow the same steps as on a Blog or News Post:

1. Title
2. Content
3. Category
4. Featured Image

Many times, a Portfolio entry will also have a slideshow or photo gallery. Your Engenius trainer will go over the specific details for your site. Use the rest of this page to take notes.

Clients/ Sponsors

Some Themes come with a custom post type for adding the logos and URLs of your clients. Many of our sites use this feature for Sponsor logos. While different themes may vary, in most cases you will need to follow these steps:

1. Title (for internal use only - this does not display on the site)
2. Logo
3. URL to the client/ sponsor's website.

TIPS & TRICKS

It is challenging to get rows of logos to look good because everyone's logo is a different size and orientation. We strongly recommend making all logos the same size. This will mean shrinking some and adding blank padding around others. When your site was built, a size was chosen, so it would be best to continue editing future logos to that same size.

Testimonials

Some Themes come with a custom post type for adding testimonials.

1. Title (for internal use only - this does not display on the site)
2. Quotation
3. Author's Name
4. Author's Company and/ or title
5. Featured Image - sometimes used. If you do not have an image of the speaker, you can use their company logo.
6. Category - sometimes used. If you have testimonials appear in different places on your site, categories may be used to determine which ones show up on which page. Your Engenius trainer will clarify this for you.

Events

If your site has a calendar or event listing, section, here is how to add future events:

1. Title (will appear on the calendar)
2. Date/ Time
3. Event Description
4. Category - sometimes used if your organization has many different types of activities.
5. Location - use if relevant
6. Contact person - use if relevant
7. Ticket purchase link - use if relevant



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