Managing Your New WordPress Website

Documentation prepared for you by BigWing | LOCALiQ

Introduction

Congratulations on the launch of your new website! We've been glad to be alongside you as a partner while creating this version of your business online. But, we don't recommend letting your site sit still. Taking an active interest in your site's future content can ensure that it never goes "stale" or becomes irrelevant. In fact, search engines tend to favor websites that show occasional regular content updates from time to time over sites that appear to have been abandoned and whose information may be out of date.

With that in mind, we will continue to be your partner in making sure that any changes or new content you want to publish going forward should be as easy as we can make it. Our first step on that is providing you with this step-by-step guide to help you get to know your new platform.

About WordPress

WordPress is the largest content management platform on the web by far, and that is largely because just about anything you might want to do is probably possible in WordPress thanks to the power of its massive community. They work together to keep the platform updated, modernized as standards change, and secure in order to keep up with any new vulnerabilities and threats that spread online from time to time. As a part of your website's maintenance contract we'll be keeping up with these system updates to make sure your website's software is always running optimally.

Technical bona fides aside, what draws most everyday people to WordPress is that they make content management easier and more customizable than most. Websites big or small can be controlled through your dashboard, and any custom features we've configured (such as testimonials, contact forms, or even design tools) are all managed in the same place.

WordPress itself is ever-changing, so this guide will mostly focus upon what tools and processes may be unique to your website. But if you don't see how to do something that you'd like to implement on your site we highly encourage you to reach out to us so that we can find a solution that will fit best within your site's ecosystem.

About Gutenberg

While WordPress has been around since 2003 they made one of their biggest changes at the end of 2018 by including a new set of tools known as "Gutenberg" (after the famous printing press). This new feature replaces the plain WordPress editing experience (an interface that looked more like a Word document than a webpage) with an optional What-You-See-Is-What-You-Get interface that more closely resembles your actual pages. Through Gutenberg it's now easier to see what you are changing and how it will impact the way your website looks.

When editing a page, post, or other piece of content, you will now see that individual parts of that content are treated like Lego blocks. Content blocks can be dragged around to other places on the page freely, new blocks can be inserted where you are typing so that you can configure how they look and what they do, and some blocks of content even have special features such as contact forms, links to your other pages, and more.

If you'd like to play around with Gutenberg in a safe "sandbox" without touching your website's content you can visit https://testgutenberg.com. Here you'll have a dummy content page you can manipulate, move around its pieces, drop in new blocks, edit what's there and more all without worrying that you might accidentally save unwanted changes into one of your own pages.

Since Gutenberg is the direction that WordPress is headed we've made sure that all the tools we've picked for your website were specially chosen because they work well with Gutenberg. This also includes custom sets of blocks that were setup to directly match your website's theme, fonts, and color scheme so that you can build your pages without having to worry as much about consistency in branding, colors, typography, and other design matters.

About Plugins

Part of what makes nearly anything possible with WordPress is its library of community-created "plugins" that can be installed into your website to add features or functionality. BigWing | LOCALiQ has used several select choices of these when building your website.

Often when looking at plugins there may be several or even dozens of them all designed for similar features. Narrowing down which one to use isn't just a matter of how highly rated or popular they are, either. It's important to note that our team takes careful time to audit and evaluate all plugins we use to ensure they don't slow down your site too much, create any security vulnerabilities, and also that it won't change any of your website's other essential features or settings. Any new plugins should fit in well with your site's current ecosystem.

If a new plugin is installed without our knowing and it ends up causing issues we may have to restore your site to an earlier backup which could cause any of your other changes to be lost. For this reason we ask that you consult with us before changing any of your website's plugins so that we can research the best way to accomplish what you want.

Future Support

While we've tried to anticipate future needs you may have and tried to make your content tools robust and versatile your needs may change and new ideas may come up. Though we'll always be working behind-the-scenes on software updates and system maintenance we'd also like to be an active partner in finding new and unique ways to grow your website. If you don't see what you need covered here, or have any questions, please reach out to us at...

Getting Started

Your website uses WordPress's dashboard to collect all of its tools and settings in one place. From writing blog posts to editing pages to creating new login accounts so that your colleagues can help you manage the website, we'll discuss each of these tasks step-by-step.

Logging In

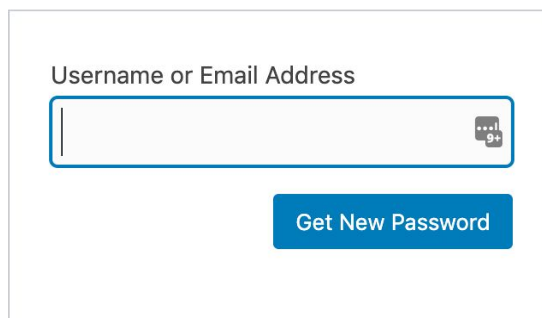
First, we'll need to make sure that you can login. When your website was launched we would have created a user account for you (as well as anyone else that was requested) and sent login info to your email address. This would have included a randomly-generated password to start, but you are not required to keep the password you are given.

Your Login Link

You can sign into your website's dashboard using the link below:

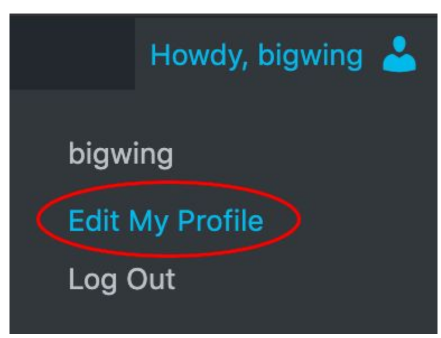
https://financialmort.wpengine.com/wp-admin/

If you no longer have your initial login information then you can use the "**Lost your password?**" link just below the sign in fields. It will then send you a new, randomly-generated password to your email address. You'll need to login with that information at least once before you can change the password to something else.

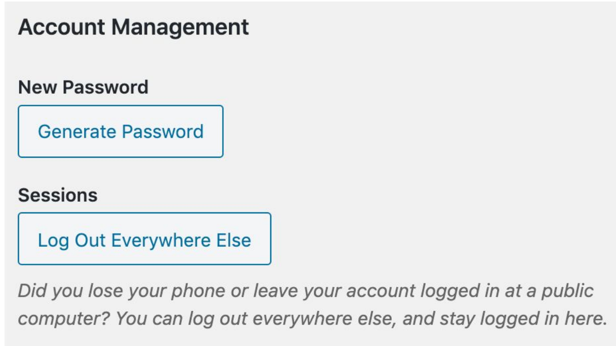


Changing Your Login Information

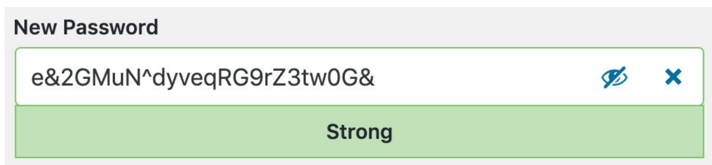
Once you are able to sign in, if you want to set your password to something else you'll be able to do so. In the upper right-hand corner of the dashboard you'll see your name. Hover over it and choose "**Edit My Profile**".



Scroll down to the section titled "**Account Management**" and you'll see some options including "**Generate Password**" and "**Log Out Everywhere Else**". The second button is worth noting as it can be used to make sure that if you accidentally left yourself signed in on a device that other people could be using (a public or shared computer for example) then you can use this to close any open sessions by logging out everywhere but your current device.



To change your password click the “**Generate Password**” button and it will show you a randomly-generated strong password. You can type over these contents if you want to manually set the password to something else. However, we do still strongly recommend that your new password be rated as “**Strong**” before saving. This should ensure that your password is harder to guess or to crack with malicious software.



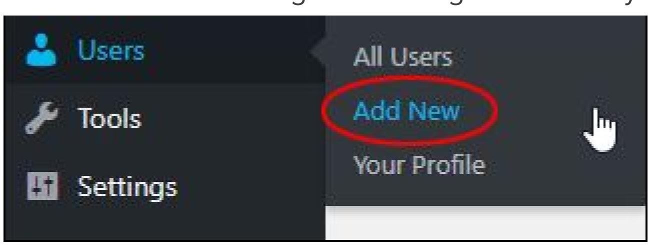
When you are done, be sure to click the “**Update Profile**” button at the very bottom.

Managing Other Users

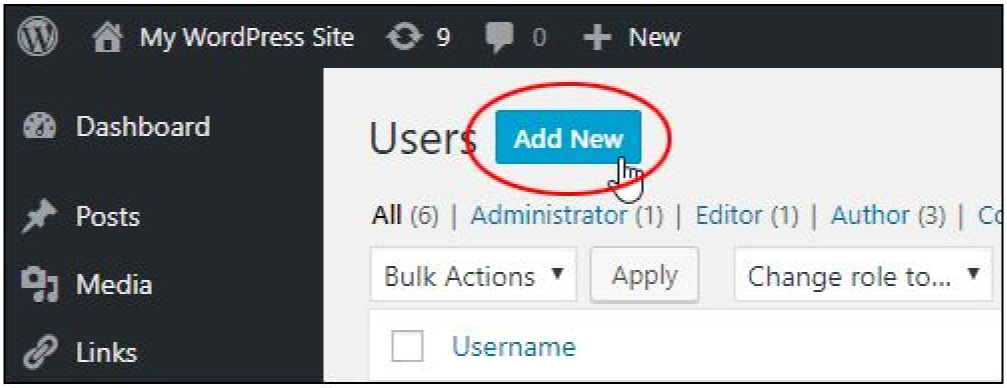
If other colleagues are going to be helping you with the website, for security reasons it’s best to give them their own account rather than sharing login information. You can also manage each user’s privileges to restrict or enable them access to parts of the site as you see fit.

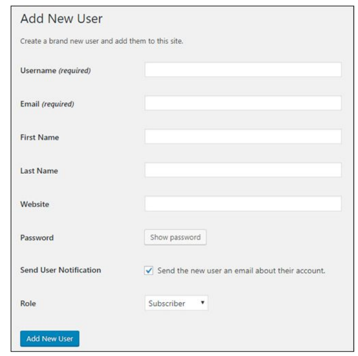
Adding A New User

1. To add new users and give them login access to your site, go to “**Users > Add New**”.

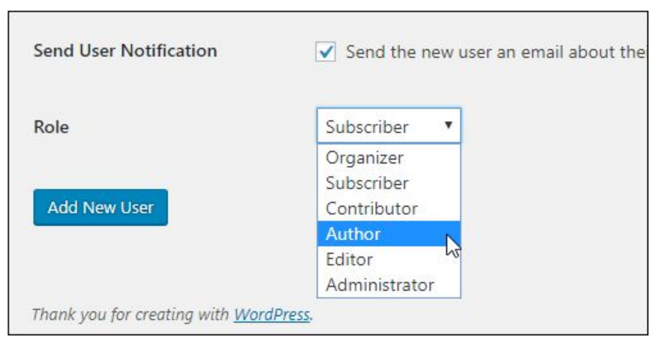


2. You can also add new users from your “**Users**” screen by clicking “**Add New**” above the list of users.





3. Either option should bring up the “**Add New User**” screen.
4. Enter the requested information into each field. **Username** and **Email** are required fields. The username cannot be changed once it is set. Various functions of WordPress will use the email address entered to send users notifications and to reset a forgotten password.
5. **Website** is an optional field.
6. You have the option to view a randomly-generated strong password that will be sent to the new user automatically, but you do not have to edit the password manually. However, this is where you can assist a user later if they need a new password created or sent to them (other than the “forgot password” option on the login screen).

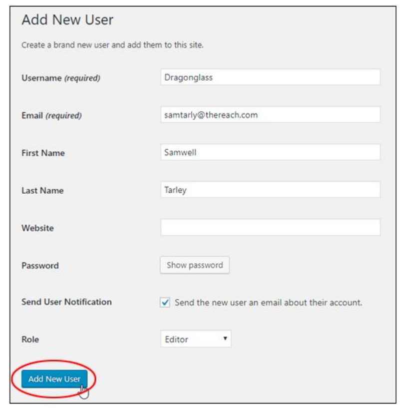


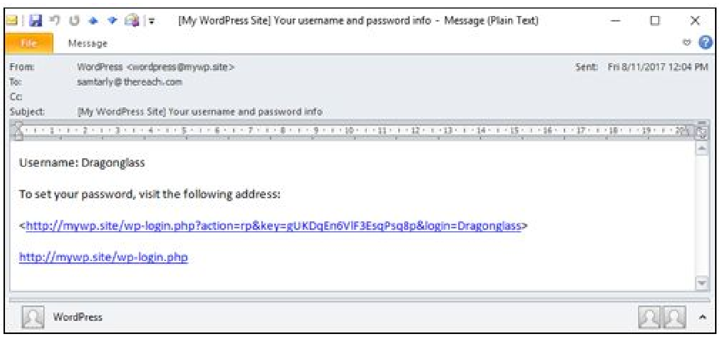
7. Check the “**Send User Notification**” box if you want your new user to receive a notification email about their account. Deselect if you don’t want your new user to have access to their login password.
8. Select the role you want to assign to your new users from the drop-down menu. Note the User Permission Roles summary table we’re including below which breaks down

what parts of the site each role can control:

BIGWING	WordPress User Permission Roles				
	Adminstrator	Editor	Author	Contributor	Subscriber
Posts	Full Control	Full Control	Add, Edit, Publish, Delete Own	Add, Edit, Delete Own	No Control
Pages	Full Control	Full Control	No Control	No Control	No Control
Upload Files	Full Control	Full Control	Full Control	No Control	No Control
Moderate Comments	Full Control	Full Control	No Control	No Control	No Control
Plugins	Full Control	No Control	No Control	No Control	No Control
Themes	Full Control	No Control	No Control	No Control	No Control
Users	Full Control	Edit Own	Edit Own	Edit Own	Edit Own
Settings	Full Control	Full Control	No Control	No Control	No Control

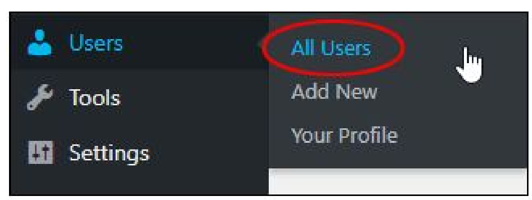
9. After completing all of the new user's details, remember to click on "**Add New User**" at the bottom to save your changes.
10. The site administrator will receive a notification email that a new user has been registered on the site, and the new user will also receive a registration email containing the login details.



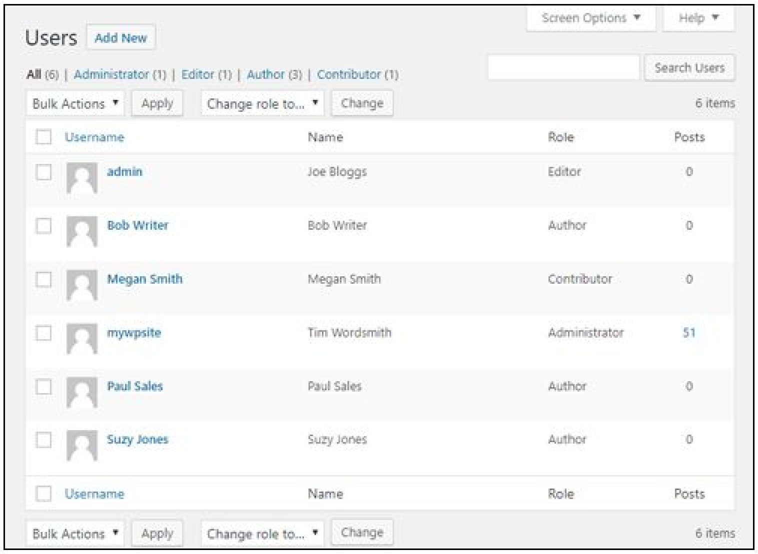


Changing Individual User Roles

1. If you are an Administrator on the site you can view all registered users on your site by going to your navigation menu and selecting "**Users > All Users**".
2. This brings up the "Users" screen which lists all registered users on your site and displays information

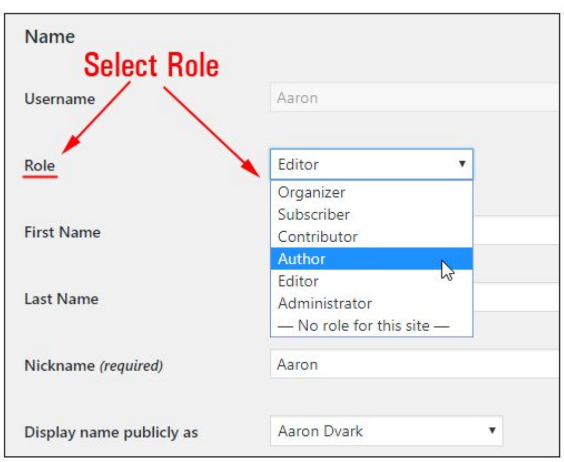


about them including their role.



3. To assign or reassign an individual user's role, hover the cursor over the username and click on the "Edit" link.

4. This will bring up their "**Edit User**" screen.
5. Scroll down to the "Role" section and select a new user role from the drop-down menu. You can refer back to the User Permission Roles table from the previous section for a breakdown of each role.



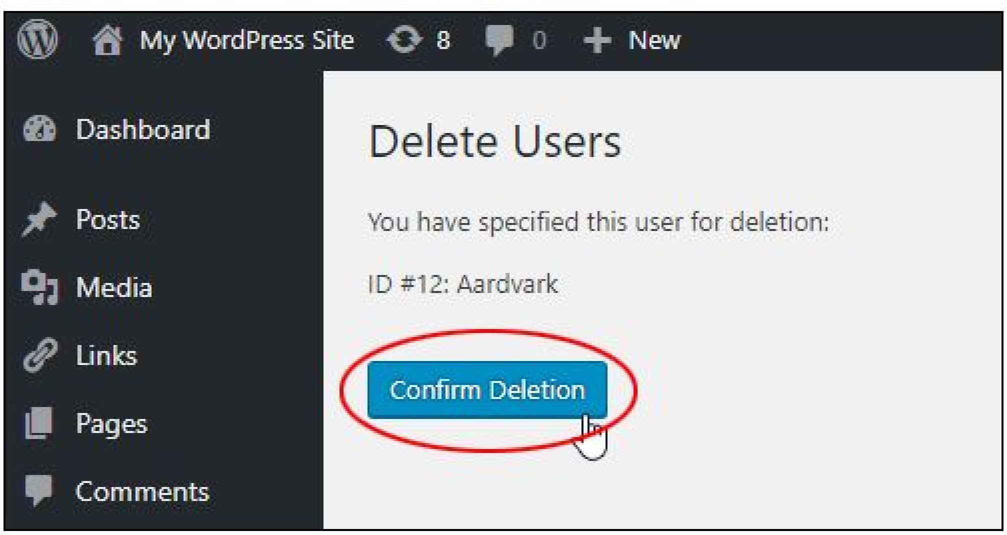
6. Click “Update User” to save your setting.

7. The user role will be updated.

Deleting Individual Users

1. To delete an individual user, hover the cursor over the username of the entry to be deleted and click on the “Delete” link.

2. You will be asked to confirm the deletion. Click on “Confirm Deletion” to proceed. NOTE: If the user you are deleting has any content tied to them (such as pages, posts or other entries) you will be prompted for whether you want to assign that content to another of your users. If so, you will be given a list of options to choose from so that your content gets reassigned to that user.



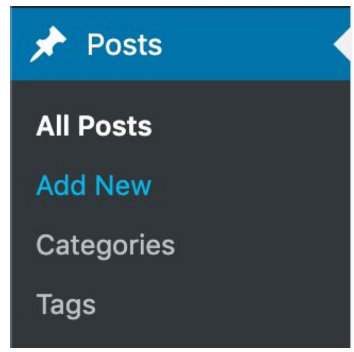
3. The user will be deleted and their details will be removed from the database.

Blogging

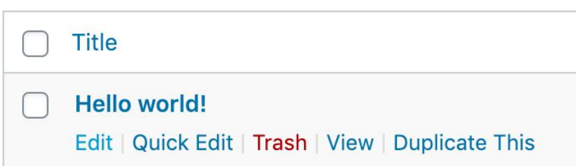
At the beginning of this guide we mention that taking an active interest in your website's content can keep it from becoming stale or irrelevant. Also, search engines prefer seeing a website where something somewhere gets updated from time to time so that they are signaled that the website has not been abandoned and is being continuously curated. The easiest way to do all of this is to operate a blog.

Ideally, you'll want to setup some sort of schedule for when you plan to blog so that your content changes consistently. For example, you might decide to post a shorter (300-600 word) post every few weeks. Or, you might decide for a longer (700+ words) post once a month or so.

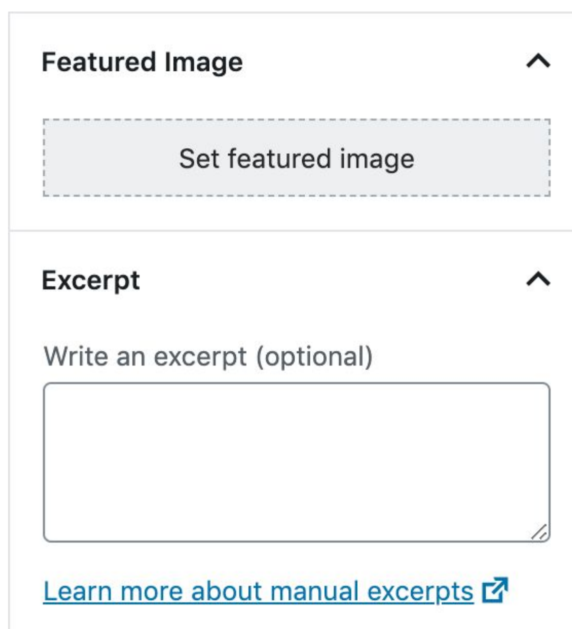
Whatever your desired frequency though it's important to stick to it to reap the best benefits. It'll train search bots that there's new content on your site on a regular basis. This will encourage your regular visitors to check back periodically to read what's new, and it will also train the search engine bots how often they should return to grab and index your latest article (and possibly earn some "freshness" brownie points in your search engine rank).



You can locate your website's blogging tools on the left side of the dashboard under the heading of "**Posts**". Here, you can click on the title of a post to edit it or hover over it for more options.



When clicking "**Add New**" you'll be taking to a writing screen. There are only two requirements for a blog post: a title and some content of some sort - basically, you can start typing just like writing an email. However, we also recommend that you use the right sidebar and provide one "**Featured Image**" and also consider typing a short description into the "**Excerpt**" field.



The **Featured Image** will show at the top of the post as well as act as the thumbnail for that post when it shows on your archive page (a grid of your past posts), in search results, and when sharing the post on social media. Images that are landscape-oriented (as in, they are longer than they are tall, like most computer screens) are recommended, as if you use an image that is portrait-oriented (taller than it is long) the image may become cropped when displayed.

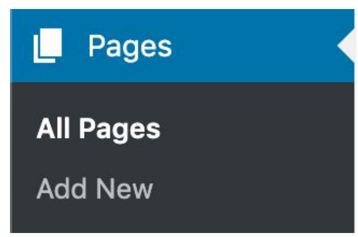
The **Excerpt** field is optional, but what it does is introduce your article with a short summary before someone clicks to read the entire post. If you do not provide an excerpt then the article's summary will be created for you automatically by grabbing the first 55 words of your post. That may be fine, but if you want to override the automatic summary you can always fill in the excerpt later.

Feel free to keep a blog post simple with just text - and simpler is typically better. However, you also have access to the same robust Gutenberg "blocks" in your blog that you'll have when working on your content pages. So, if you want to drop in a form for someone to fill out, organize your content into columns, or use any of the other special purpose blocks in your article you're free to do so. We'll cover working with blocks in the next section.

When done creating a new post be sure to click "**Publish**" in the upper right-hand corner (or that button will be replaced with an "**Update**" button if you are editing an existing post).

NOTE If you don't see your blog as a page in your website's menu then we may have hidden the page until you've made at least one post. This is to prevent visitors from seeing a mostly empty page. If you're done writing your first blog post, just contact us when you're ready and we'll finish launching your website's blog features.

Finding Your Content Pages



Working on your site's content pages works about the same way as it does for blogging. Down the left side of your dashboard you'll see "**Pages**" as an option. Visiting this section will show you all of your website's pages. Clicking their names will launch an editor, or hovering over each page's row will show additional options.

While blogging is typically kept as simple as possible, your content pages are typically more robust both in text and in structure. Most of this structure comes in the form of Gutenberg "blocks" which we've discussed briefly so far and will cover in more detail in the next section.

Editing Content Pages

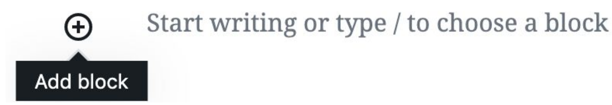
The most fundamental part of your website is its content pages. While our staff has ensured that your starting pages are written and structured well and contain some elements of design to them we want to always encourage that you take an interest in these pages should your site need to say something different.

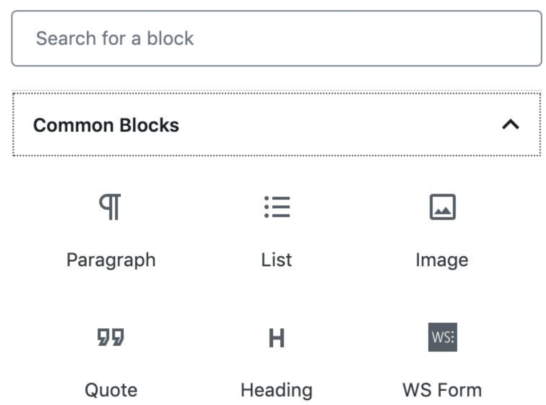
With that in mind, we utilize WordPress's Gutenberg editing system so that when you decide to change one of your content pages what you see in the editor will be very close to how the page will look when viewed by a visitor (with some differences on tablet and phone).

Working With Blocks

As a reminder, if you'd like to play around and get familiar with how Gutenberg works you can visit https://testgutenberg.com/ where you'll have very similar editing tools for a dummy page and there's no risk of saving changes to your live website.

The basics though are that in addition to typing your text into the editor you can also drop in a block by clicking on the plus icon.





This will bring up a menu of various blocks all of which can be considered components of your page. You'll see straightforward options like paragraphs, bullet lists, images, headings and such, but also some specialty blocks that may serve many different purposes. You can also search for blocks using the bar at the top if there's something specific you're trying to add to a page (like dropping in a YouTube video for example).

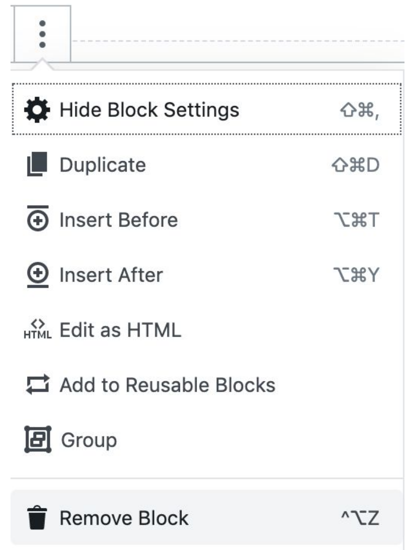
Scrolling down the block browser there will also be blocks organized by categories such as:

- **Common Blocks** - the basic components that go into content such as different text and media types
- **Layout Elements** - can be used to split content into rigid columns, add manual spacing, content breaks, and other formatting rules
- **Formatting** - these are for inserting special kinds of text such as code, quotes, or tables

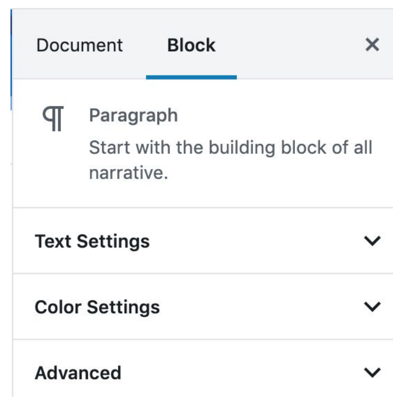
There are other categories as well, some of which we'll discuss specifically in the next sections. Also, since Gutenberg is a part of WordPress, new blocks may be added as WordPress releases new features.

Once blocks have been dropped into your workspace you can then drag them into different positions by clicking on them once to select them and then using the "handle" that will appear to the far left of the block. You can also use the up or down icons at the top or bottom of the handle to rearrange the block above or below adjacent blocks one "step" at a time.

With a block selected, a header of tool icons should appear across the top. The icons will vary depending on the block you've clicked. One icon you should always see is the vertical ellipse which will give you additional options such as inserting a new block above or below what you've selected (which can be easier to use than trying to drag something into the "sweet spot" between two blocks).



Also, with a block selected, your right-hand toolbar should change to give you settings for that particular block to allow you to customize it. Such tweaks could include making text bigger/smaller or changing colors on text, picking size presets for images, setting links and styles for buttons, or other properties that will change from block to block.



To summarize, when you initially drop in a block it likely won't do much other than hold the place for a piece of your page you have planned. You can go ahead and place it in your workspace, drag it around or rearrange things until it's in the right spot, then open its settings and tell it what you want it to do. Once that block is setup the way you'd like it, move onto the next piece of your page's content until all your blocks are assembled with the text, images, links, buttons, contact forms, or other pieces that make up your new page.

Some blocks may require more setup than others whereas some are very straightforward. There are also some custom blocks and features which are unique to your website which we'll discuss in the next sections.

Using Kadence Rows as a Foundation

There are numerous third-party makers of Gutenberg Blocks that expand upon the ones that WordPress offers with their base system. Kadence Blocks Pro is one that we have chosen so that you'll have some more powerful tools in your toolbox which were specifically customized to match your website's theme, fonts, and colors. We'll cover some of the basic highlights as well as how to customize things to suit your needs going forward.

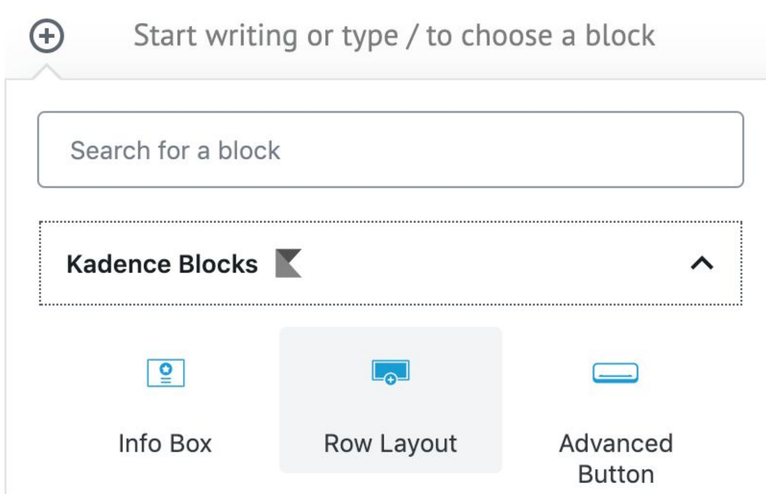
The primary block in Kadence - **the one which should be used as a container for everything else** - is the "Kadence Row". This serves a few useful purposes:

- It groups similar content to keep things organized into managed sections. Once a row contains contents you can easily move the entire row around along with everything that's inside of it.
- A row can be told how many columns to have, how wide each column should be, and when those columns should break back into their own rows on desktop, tablet, or mobile-sized devices when space gets tight. This is an improvement on Gutenberg's basic column block (found under "Layout Elements") which does not allow you to control when the columns turn into rows or how they "stack".

- Rows can have their settings changed so that everything within that row follows the same rules for colors, padding, and other display properties. For example, you might want to create a stripe effect in a page where everything in one row has white text and a dark background. You can tell the row what text color everything should have, and then fill it with as much text as you need without having to tell each piece of text what color it should be - it'll follow the rules of the row that contains it.
- Adding a background image, parallax scrolling effect, or video header can be used to create striking calls-to-action or to replace a page's default header.

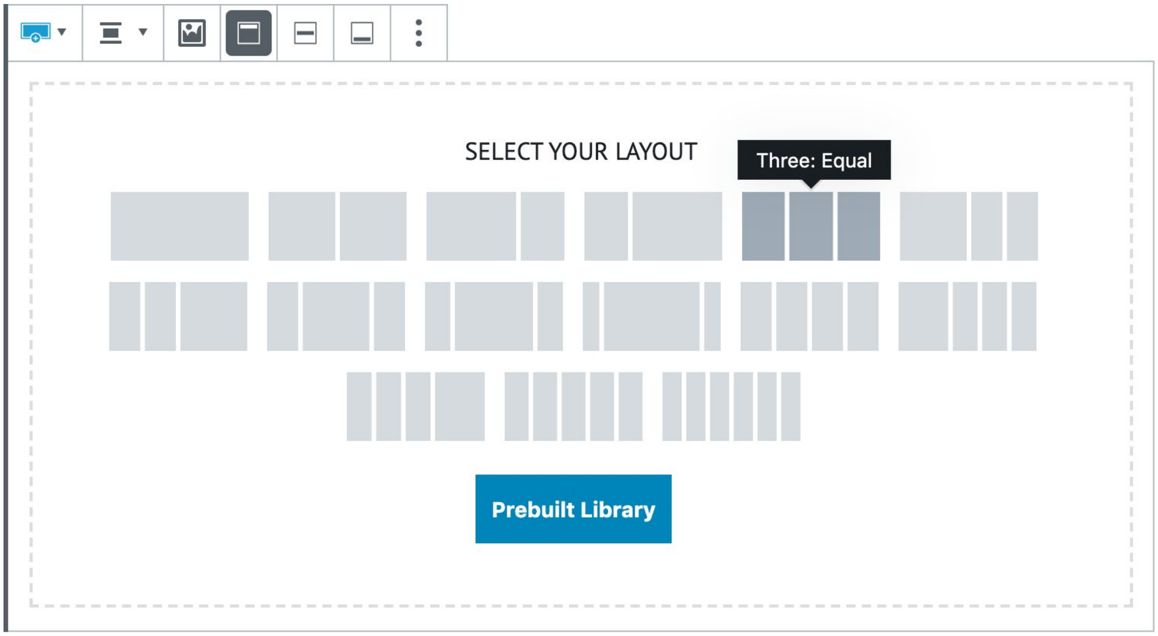
It's highly recommended that before you insert any new blocks of content into a page that you start with a row. If a row is already there then you may wish to edit that row to add a column or you may want to add a row before or after the current row. This will ensure that each section of content that has different formatting is grouped into easily managed containers. Dropping content directly into the editor without first adding a row can lead to issues such as that content not having the same padding as other parts of your site and make it more difficult to arrange things later on as the amount of content grows.

Begin in the Block Editor by clicking the plus icon to insert a new row:



NOTE Blocks are arranged by category, and "**Kadence Blocks**" has its own category. "**Row Layout**" should be one of the first ones in the list, but the list order does change so that the blocks you use the most float to the top.

Once you've clicked "Row Layout" you'll be given some options to help you get started. You can choose how many columns you'd like now if you already have a plan in mind (including whether those columns are equal width or wider/narrower on one side) or you can always add or remove columns to your row later on down the line.



NOTE Kadence Row includes a "**Prebuilt Library**" button which includes some pre-designed pieces of content. While this can be a quick way to get started it's important to note that the prebuilt library is built and controlled by Kadence, not by BigWing | LOCALiQ, and the designs they offer may not use the same color scheme, fonts, sizing rules, or other thematic settings that we've used throughout your site's existing content. What this means is that if you use them as is they may clash with your site's design unless you then edit the pieces to use colors and settings closer to the rest of your site's theme.

Also of note is the width control along the top toolbar. You'll have these controls when working with many other content blocks. In most cases the default setting will be fine. It's important to note that many of your content pages have a "boxed in" appearance with margins on the sides of the page to create breathing room. This was an intentional design choice that works well for most pages. If however you want to insert a row of content that goes completely edge-to-edge there is a "**Full width**" option available that will break out of those margins. This can be useful for calls-to-action that need to stand out from other basic content.

Once you have a Kadence row inserted you can fill it with other blocks and content as needed, but you can also use the right-hand settings column to change text colors and background effects that will be applied to all content inside that row.

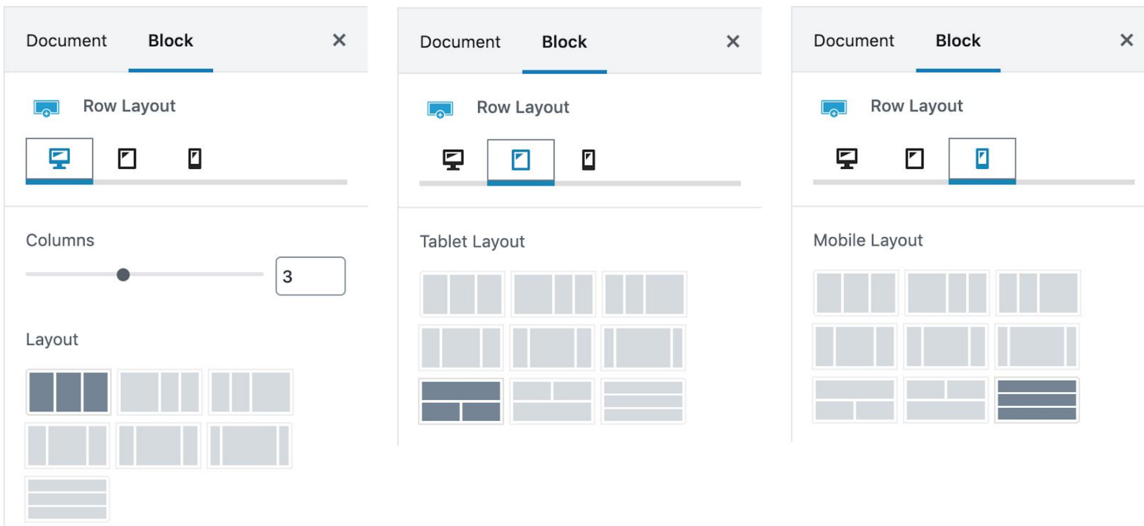
You can use as many blocks as you need, but we do not recommend placing rows inside of other rows as that can create redundant padding around your work since each row adds its own spacing.

If you'd like to learn more about Kadence's blocks and how to use them you can also use the following resources:

- [Kadence Gutenberg Block Tutorials Blog]
- [Kadence Blocks Knowledge Base]
- [Kadence Blocks PRO Knowledge Base]

Setting Up Rows For Mobile Devices

One of the most useful things you can do with a Kadence row versus the regular "Columns" block is setup different rules for how many columns will appear on different sized screens. This is controlled at the top of the right-hand settings column using the three icons that represent desktop screens, tablet screens, and phone-sized screens. Clicking on each icon will let you control how the row will rearrange on each type of screen.



In the examples above, a Kadence row is setup to have three equal-sized columns on desktop-sized screens. On tablet-sized (or "in-between") screens, the first column will become its own row, but columns two and three will still be stacked into its own two-column row. On mobile-sized screens all three columns stack into their own rows.

Note the layout icons that allow you to setup lots of different layouts. This can be a powerful way to easily ensure that your content looks as good as it can on a variety of screen sizes. Depending on the amount of information you put into each column you may find that, as screen sizes shrink and content gets squeezed around, one of the other layout choices may be a better fit for what your content does on those devices.

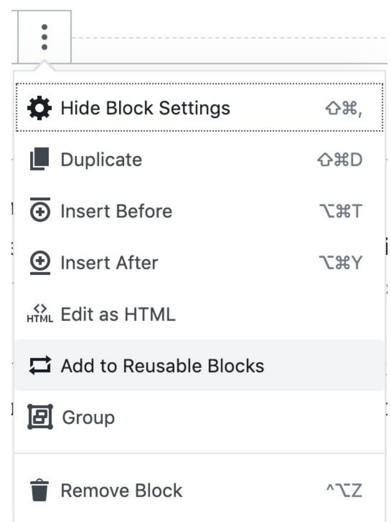
We highly recommend trying your site's pages on a tablet and a phone and changing these settings to see which ones look the best. Though BigWing | LOCALiQ has already gone through the site's content during our launch quality checks, future content changes should continue to be checked.

What Are “Reusable Blocks”?

Reusable Blocks are a way to take a snapshot of a set of blocks to use again later. For example, on many of your site’s pages are graphical “hero” headers and occasional “call-to-action” rows that are all styled similarly for a consistent design to match your brand and theme. Much of the time, these were built using the basic Gutenburg tools so that they can be edited just like the rest of the page. In order to save time inserting these same styled elements into every page of your site we set it up once in the editor and then turned it into a “Reusable Block” so it could be inserted again and again with just a few clicks.

NOTE Reusable Blocks are not Gutenberg’s version of “copy and paste”. You can still select a block and do a standard copy (**Ctrl+C**) and paste (**Ctrl+V**) that same block elsewhere just like you can copy and paste other things. In most cases, copy and paste is the method you will probably find easiest to keep using regularly, especially if something will only be used a few times and you know you intend to tweak each of them after placing them in your page. Reusable Blocks are specifically for saving blocks exactly as they are in a library for future use, not for quick duplication.

Creating a Reusable Block

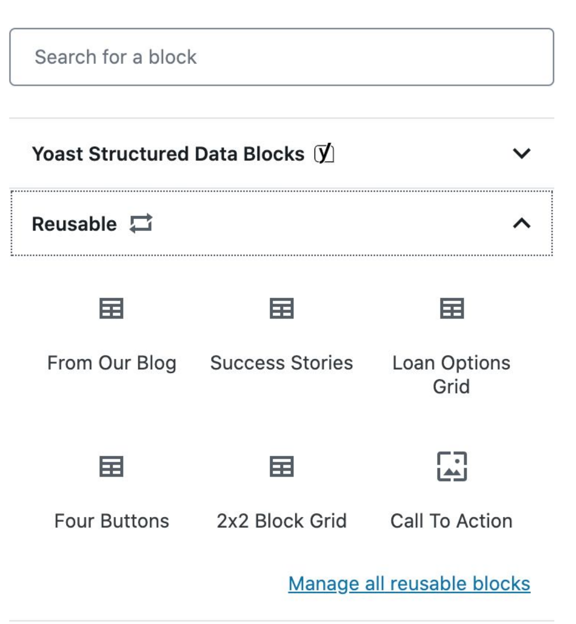


Setup a block the way you want it once, such as if you are going to have a row with a custom background image and effect, a special text color setting, a heading, a button, or any other number of pieces.

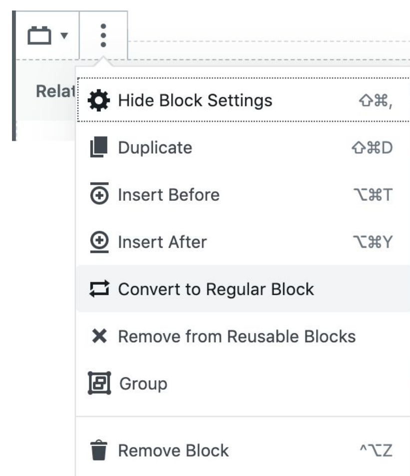
Then, to save yourself that setup work the next time you need a block like this, select the top-most block (usually a Kadence row) and click on that block’s vertical ellipse icon (⋮). In the dropdown menu choose “Add to Reusable Blocks”, give your new block a custom name in the Name field, and then click Save.

Inserting a Reusable Block

The next time you need a block just like that one again you can browse for any saved blocks by opening the “**Reusable**” category in the block browser. Click on the block’s name and it will be inserted into your workspace.



Editing a Reusable Block After It Is Placed



The initial intention behind Reusable Blocks is not to make your own library of custom blocks (though that's almost how we are using it in your website's case). This feature was actually designed by WordPress so that you could put something into several pages identically (for example having matching call-to-action rows on every page of your website) and have one centralized way to change all of those same elements simultaneously. Editing the call-to-action in one page would make all "copies" of it elsewhere on your site match without having to seek out and change each one individually.

After inserting a block into a page though, if you want this block to be changed independently of how it was setup you can do so by converting it into a regular block. Click on your reusable block's vertical ellipse icon (⋮) and from the dropdown menu choose "**Convert to Regular Block**". This will unpack all of your saved settings and content and turn it into a block that can be freely changed just like the others on your page.

Managing or Deleting a Reusable Block

As a reminder, you may not need to create a reusable block for every piece of similar content and in many cases it may be best to just rely on copy/paste instead of creating a list of blocks that you'd then have to maintain and keep tidy. If you've created a Reusable Block and no longer need it you can clean up your saved blocks to prevent future confusion.

At the bottom right corner of the list of reusable blocks in the block browser is a link for "**Manage All Reusable Blocks**". Here you can view the blocks you've created, edit them locally (so you can change its settings for future use), or delete them from your list.

About our Custom Reusable Blocks

Many of your content pages have pieces that match each other because they started off as Reusable Blocks during the initial setup. As pages were finished these blocks were converted into regular blocks so that each page could be edited freely without affecting the others.

We've kept these blocks in your library to save additional time creating pages in the future while still ensuring that new pages can easily use those same design elements on the existing pages. The blocks we built are as follows:

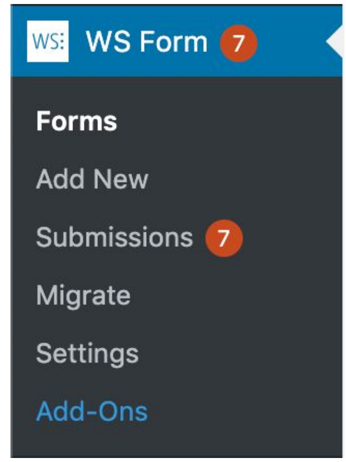
Call To Action	A full width row that comes with a background image behind a colored overlay and features a heading, some text, and an action button. The background image can be customized after placing as can all text and links. The default left-aligned image can also be removed or replaced as needed. This is intended to be used at the close of a page to give visitors an action to take such as to download a guide, apply for a loan, contact you, or other lead capture tactics. Nearly all content pages BigWing | LOCALiQ created will end with some sort of call to action as it's always a good idea to use an attention-getting message to encourage people to reach out to you.
2x2 Block Grid	A quick set of four square images with a text overlay across the bottom. These are useful for quick calls to other content pages. The images can be swapped out easily and the text and link changed so that you can use this as a template to highlight a set of things your visitors should check out. You can also copy and paste each image block a few more times within each column if you'd like to have more than four, or delete some if you only want a few.
Four Buttons	A lower level way of calling out to some additional content, this is a section of four plain lozenge-style buttons. The text and links of each button can be changed. Handy for linking to a set of pages without having to also pick some images for each of them like you would with the 2x2 Block Grid.
Loan Options Grid	Similar to the 2x2 Block Grid but this time 3x2 and also already filled out with six of your loan products. You can use it as is to bring visitors into each product or replace the images, text, and links to call out to other content instead.
Success Stories	As seen on the homepage, this is the block used to create containers for the three testimonials featured there. You can use this block to add additional testimonials elsewhere in your content.
From Our Blog	This block hasn't yet been used since the website starts off with no blog posts in it, but once you have at least one blog post you could use this block to add a feature to any content page (the homepage might be a good place for it) that calls attention to the article. Click on the placeholder space on the right and you can tell it how to find the post (or content page) you want to feature.

Other Unique Features of your Website

In addition to customizing your website's theme and the WordPress experience there are some features that were added as a custom set of tools per your request.

Contact Forms

Though contact forms are a basic feature in most websites the default offerings in WordPress are basic and do little more than send you an email. Our preferred plugin for creating contact forms is WS Form. We will have configured your website's current forms for you already, and you'll be able to view how these are setup by going to "**WS Form**" on the left of the dashboard.



NOTE If you see a number in a red circle next to the "**WS Form**" heading this is the number of new submissions that have come in from your site's forms. Submissions will be discussed in the next section.

Visiting the main screen here will show you a list of forms, and hovering over a form's row will reveal options to manage each form.

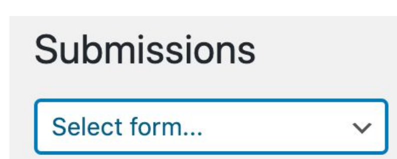
There are numerous ways you can build a form and customize what it does when someone sends their information such as to send them to a special page at completion or create a custom response email. Any forms built by us have already been configured prior to launch but can be edited later as needed. You can read more about managing your forms in the WS Form official documentation here.

Checking Form Submissions

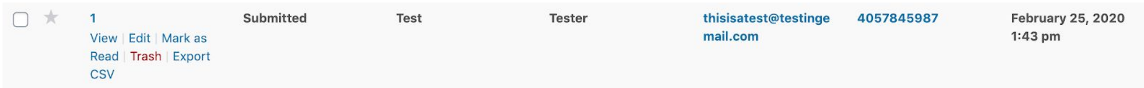
By default, when anybody fills out one of your website's forms your chosen admin user will receive an email message that contains the information that your visitor shared in the form. You can also edit the form to send those notices to other email addresses if you choose (see the WS Form official documentation for steps).

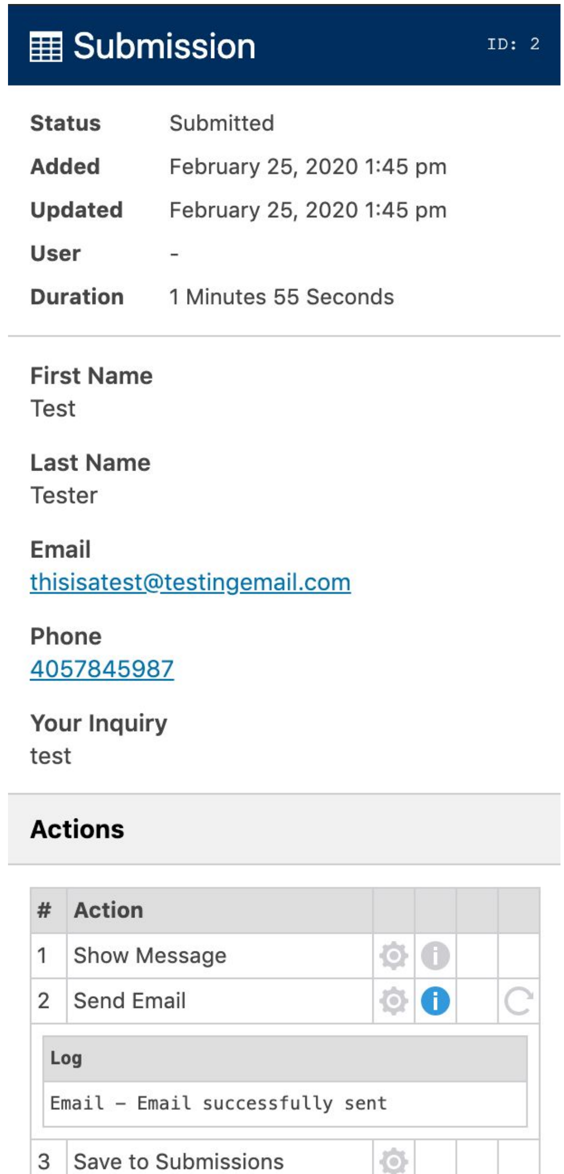
Rather than relying on those email notifications though you can also check your website's submissions at any time by going to "**WS Forms** > **Submissions**" on the left of your dashboard. If you have new submissions you may see a number in a red circle indicating how many of them are new.

Submissions are organized by what form your visitor filled out on the website. Before you can view them you'll need to specify which form's submissions you want to view. At the top of the next window there will be a dropdown menu with a list of your site's forms. Select the form and it'll list all submissions for that form.



When looking at the list of your submissions they will all be marked as new until you select one and click "**View**".



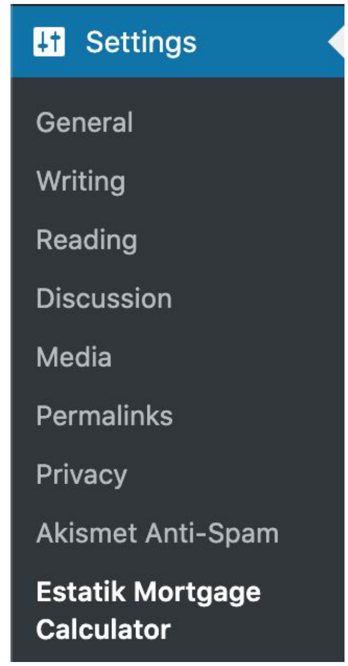


Viewing a submission will show you on the right the exact date/time that they filled out the form as well as what they typed into each of your form's fields. The "**Actions**" section in the lower right will also show you what the user was sent when they completed the form which is usually showing them a brief message and sending them a thank you email. Clicking the info icon will give you details about those such as what message they were sent and if the email was delivered successfully.

If you'd like to change the messages and emails a form sends to a user please refer to the WS Form official documentation.

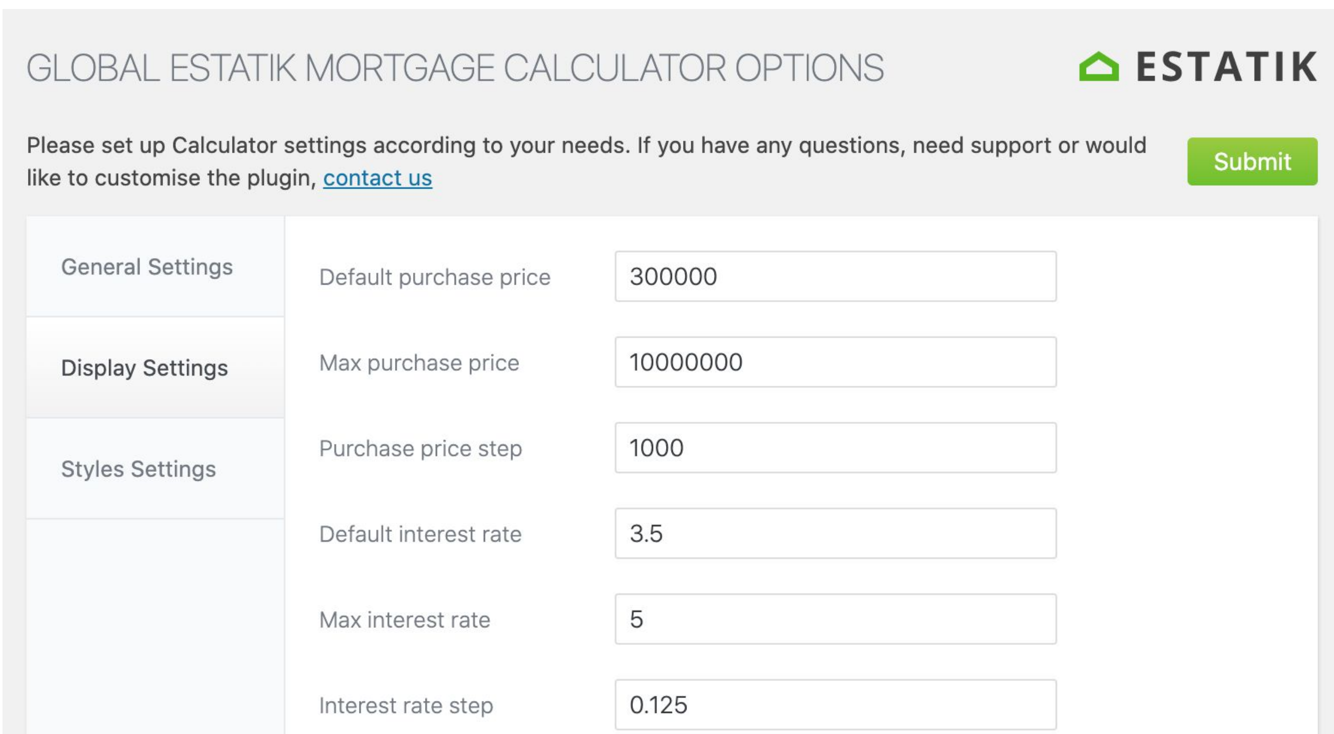
Estatik Mortgage Calculator

Your website's mortgage calculator page is powered by a special plugin. Though it's mostly set-and-forget you may choose to edit its default or placeholder values later on if your loan packages change (for example, if you want to have the default interest rate, loan term, or down payment to start with different numbers).

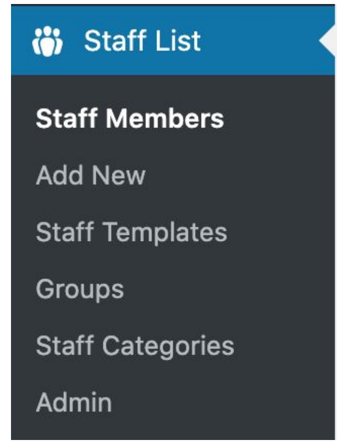


To access this section you'll find "**Settings**" on the left of your site's dashboard and then go down to "**Estatik Mortgage Calculator**". The next screen will have some tabs in its left margin, most notably the "**Display Settings**" tab where you can setup what the default and placeholder settings will be for many of the fields as well as minimum/maximum ranges and step settings for the sliders.

You can also turn on or off additional fields such as down payment, property tax, PMI, and home insurance if you want those to be considered when giving a visitor an estimate. Many of these were left off for the sake of simplicity but can be added, changed, or removed as you see fit.



Staff List



The staff directory of your website is one of its most crucial components. We've installed a special plugin to help structure and standardize the information as well as help format things properly for search engines and to allow for unique features for your loan officers.

When you're signed into your dashboard you'll find "**Staff List**" down the left side. We've already configured many of its setting screens, most notably the custom template we've setup under "**Staff Templates**" which was built by the BigWing | LOCALiQ staff especially for your site and its custom design. It's likely that the only screens on the staff tool that you'll ever use will be the "**Staff Members**" screen (where you can view, edit, or remove your existing staff) and the "**Add New**" screen.

Before we get into the specifics of managing staff it may help to understand the benefits of handling staff content this way as opposed to simply creating a regular content page for each staff member and writing it all out freehand. The first thing this feature does is allow for quick and easy data entry. You need only fill in fields containing each person's data and it'll be placed into a template that matches every other staff profile. It'll handle all formatting and take input like loan app links, phone numbers, and email addresses and ensure that they are all arranged consistently from one profile to the next.

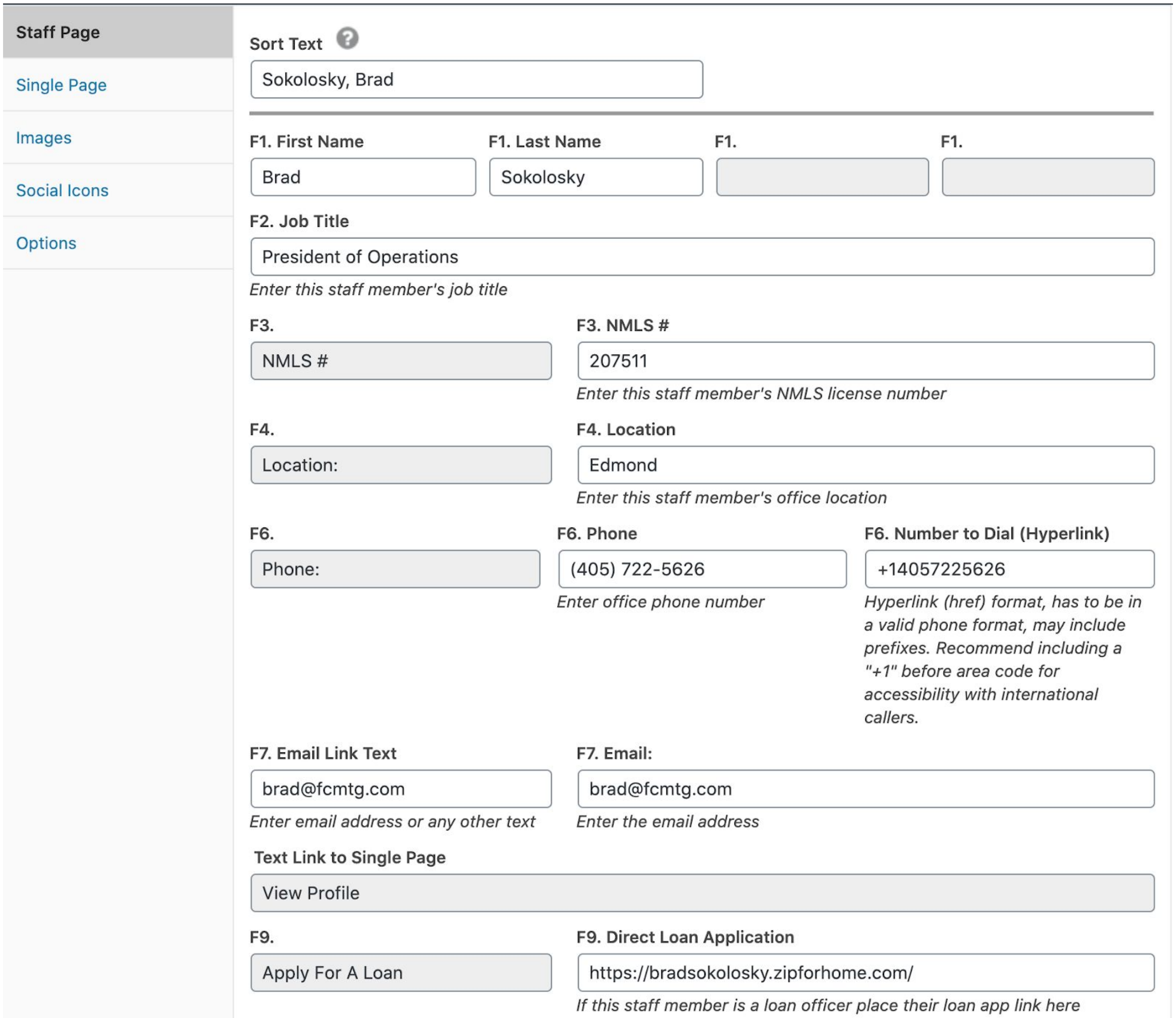
Another big feature is that it takes each staff member's information and formats it according to search engine Schema guidelines. Schema is a way of labeling important bits of data into categories to add clarity and context. Schema came from a collaboration between many of the big search engines (including Google, Bing, Yandex, and Yahoo!) and helps their content crawlers focus on useful details such as contact information and professional affiliations and also works to add rich snippets onto the search engine results page when someone's profile is a match for a search.

Setting up Schema for each person manually could become complicated (and you can learn more about person Schema here if you're curious), but we've built the important info directly into the staff template so that as you're filling in someone's details it'll build Schema code for them behind-the-scenes automatically.

With the technical background out of the way, let's look at the process of entering staff into the system. Whether adding a new member or editing an existing one you will see the same set of screens. On the first screen, the "**Staff Page**" tab, it will collect basic information that will be shown on the brief grid of all your other staff members (additional details will come on later screens). Most of the fields are self-explanatory, but a few have some special features attached:

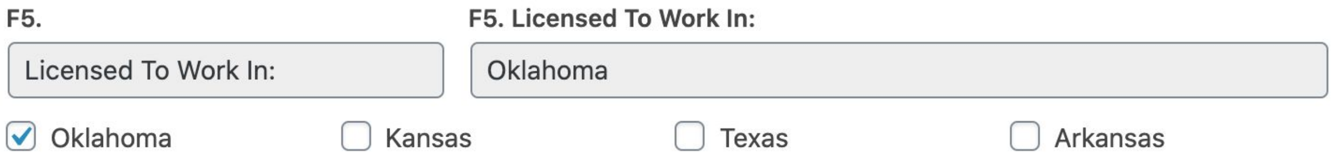
- "**Sort Text**" at the very top of the page was added into the template so that staff could be sorted by last name followed by first name. We recommend filling this out with their last name, a comma, and then their first name, but you can also do things like insert special characters at the beginning of this field if you want someone to be bumped to the top of the list regardless of their name (for example to have executive teams appear first).

- "**F6. Phone**" is the reader-friendly way of typing a phone number. Type it how you'd like it to appear visually such as including parenthesis around the area code, dashes or dots between numbers (example: "405.555.1234"), or any other chosen separators. If your office stationery has phone numbers written a certain way feel free to type it here in the same manner. This field is here to be cosmetic but informative.
- "**F6. Number to Dial (Hyperlink)**" is used to make sure that no matter how you typed the reader-friendly phone number field in "**F6. Phone**" we want to ensure that it is picked up as a click-to-call link. Some mobile browsers are smart enough to detect when text looks like a phone number and will automatically turn it into a link, but not all mobile phones or call-capable internet devices (like ones that use VoIP) are the same. This field will manually turn the phone number into the correct kind of link that will work no matter what kind of device someone is using (as long as it has calling functionality). Here, you'll type only the numbers with no separators. It's also recommended that you begin the phone number with "+1" just before the area code (which is noted just below the field as a reminder) because without that prefix if someone is calling from an international service it won't connect to the right country code and you won't receive the call.
- "**F7. Email Link Text**" is similar to the reader-friendly "**F6. Phone**" field in that you can type whatever text you want to be shown on the link to your staff member's email address. For the sake of our examples we've setup everyone's email link text to just be their email address so that visitors can read the address easily if needed. However, if you were to type "Email me" into this field as an example then on someone's profile it would add the text "Email me" and clicking on it would open an email compose window.
- "**F9. Direct Loan Application**" should be left blank if this staff member is not a loan officer and if so then this feature will not be used. However, if they do offer loans and have been setup in your origination software with their own online application you can paste the URL into this field so that an "Apply For A Loan" link will be added to their profile and will take visitors directly to their application.

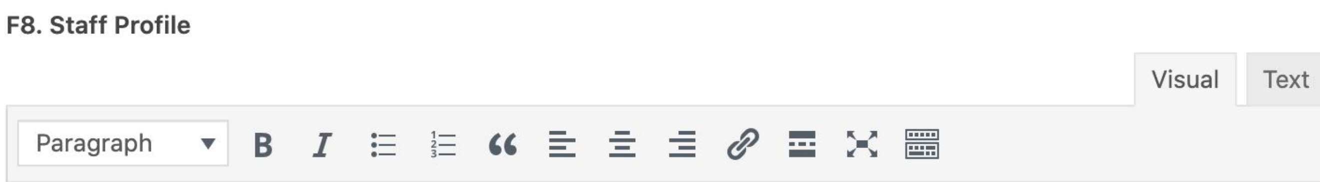


The information entered into the “**Staff Page**” tab will be carried into the next tab, “**Single Page**”. This screen is used to provide the more rich personal information that someone will see when they open an individual’s profile. There are only two additional items to complete on this screen.

The first is “**F5. Licensed To Work In:**” where you can simply check the boxes next to the states where this person is licensed. As you check the boxes it will automatically chain them together as “Oklahoma, Kansas, Texas” (for example) which will save you on typing.



The next field is “**F8. Staff Profile**”. Here you will have a full editor so that you can format the text much like you would when using a word processor. Many of the icons should be familiar, such as bold, italics, bullet lists, text alignment, and inserting links. The final icon that looks like some blocks stacked on top of each other will open an additional toolbar with even more options that aren’t as common such as changing text color, inserting special characters, and more. This editor can also accept contents pasted into it from other word processors, but if anything odd does show up after pasting from another program (such as unnecessary margins, mismatched fonts, odd sizing rules, and so forth) you can use the “**Clear formatting**” icon from the extra toolbar to reset a selected block of text.



The next screen will be the “**Images**” screen to provide this person’s photo. Use the “**Select Image**” button and you’ll be able to browse for or upload a photo to use for this person. If you do not select an image then a placeholder will be provided automatically.

We also recommend filling out the “**ALT Tag**” field with the person’s name or a description of something else from the photo. ALT tags are used by search engines to understand what is in a photo, and they are also used by screen reading programs that help the visually impaired navigate websites.

You have the option to make the photo on the staff grid be one image and the photo that accompanies their full bio be a different image. However, if you are fine with the same image being used in both places then you can leave the rest of the screen alone and it will default to using the same image.

Staff Page Image

Image URL: https://www.fcmortgageloans.com/wp-content/uploads/2020/08/FCM-Headshots-12

Image ID: 576

Select Image

ALT Tag: Brad Sokolosky

Single Page Image

Image URL: SP

Image ID: 0

*To use the same image for Staff Page and Single Page enter **SP**.*

Image Link

Image Link: SP

*To create a link to built-in Single Page enter **SP**. For other links enter URL.*

The "**Social Icons**" screen has not been implemented beyond the basic Facebook, Twitter, LinkedIn, and Email fields, and at the time of launch was not being used for any of the profiles. However, if you wish to use this feature in the future those four social icons should work fine. If there are additional custom ones you wish to use that will require editing the staff template to tell it what other social icons to use. This process is described in the plugin's documentation here.

The final "**Options**" screen only has a few notable fields to fill out, both of them having to do with proper search engine optimization (SEO). While neither of these fields are likely to break anything and are considered optional it is good to follow best practices so that things are consistent and predictably formatted across your website.

Single Page SEO Options

"Pretty" Permalink: brad-sokolosky

*Optional. Person name or any other text. Example: **john-smith**. No spaces!*

Page Title: Brad Sokolosky - President of Operations

Optional.

The "**'Pretty' Permalink**" field is what will show up in the address bar while someone is visiting this person's profile and will also show up as the link to this page when it shows up in the search results. Staff URLs look like https://www.fcmortgageloans.com/profile/firstname-lastname/ with "firstname-lastname" of course being each person's name. Keeping this format is a good practice as clean URLs make for healthy SEO.

"**Page Title**" is a little different. Your website uses plugins such as the **Yoast SEO** plugin to generate most of your site's page titles, but it does need help in some areas. In this field's case we have things setup behind-the-scenes so that Yoast can write the first half of the page title (which is "Staff | Financial Concepts Mortgage |") but this field will be used to write the second half of the page title. The recommendation here is to type the person's full name followed by their title which will then get added on to the end of what Yoast generated.

The final thing to consider is if this person should be added to your site's separate list of loan officers (as seen on your website's "Select A Loan Officer" content page just before applying). On the right side of the window you'll find the "**Staff Categories**" feature. If you check the box for "**Loan Officers**" then they will be included on that page.