

# WordPress CMS Instructions for



**Circle Z Ranch**  
Patagonia, Arizona

Arizona's original guest ranch

## Notes

# CMS instructions for Circle Z website (WordPress)

Updated 10-2018

**Login to Staging** CMS: <http://circlezranch.wpengine.com/wp-admin>

After site goes live, login here: <http://circlezranch.com/wp-admin>

Login credentials will be supplied by site administrators (subject to change)

**Dashboard:** Your login will take you to the dashboard.

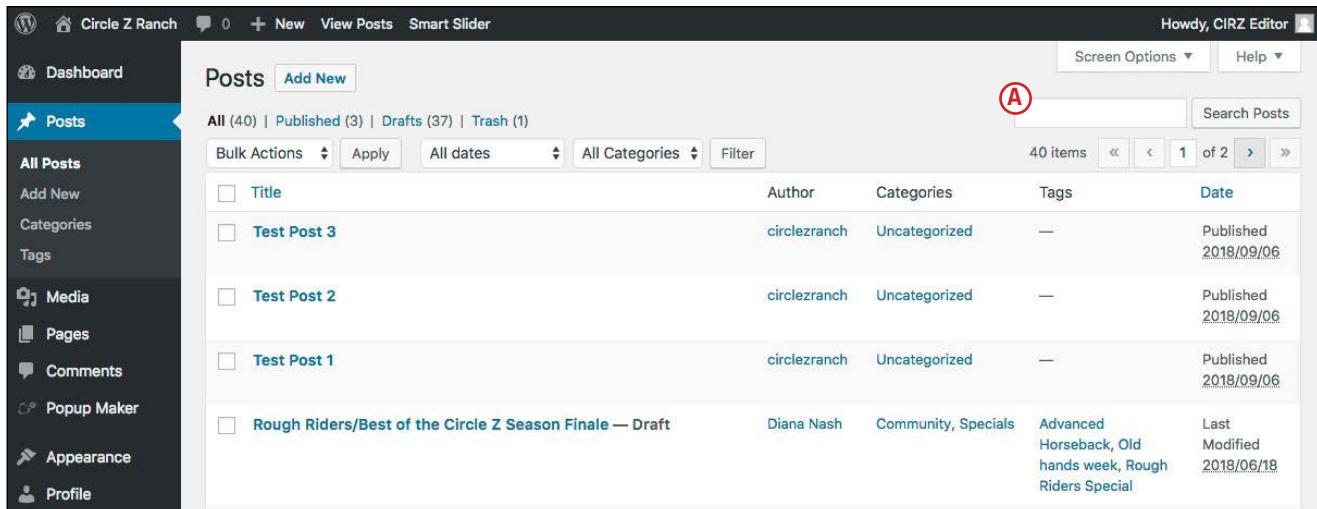
The screenshot shows the WordPress dashboard for the 'Circle Z Ranch' website. The left sidebar contains links for Posts (A), Media (C), Forms (D), Pages (B), Comments, Popup Maker (E), Appearance, Profile (F), Tools, and Smart Slider (G). The main dashboard area includes sections for 'At a Glance' (showing 3 Posts - A and 78 Pages - B), 'Pages Tree' (listing categories like Activities, Dining, About Us, Amenities, Book Now, Home Page, Lodging, and Planning Your Trip), 'Forms' (listing Employment with 1 unread and 1 total), and a 'Quick Draft' section. The top right corner shows the user 'Howdy, CIRZ Editor' and 'Screen Options'.

Your edit options appear in the left column in the upper-left box in the dashboard.

- (A) **Posts:** To add or edit a post (blog or news article, etc.), click here. Posts may be programmed to appear in various places throughout the site, depending on categories assigned to them.
- (B) **Pages:** To add or edit a page, click here.
- (C) **Media:** This will allow you to browse your media library to add or edit photos or upload documents.
- (D) **Forms:** Clicking here will allow you to add to or edit forms or view and download form data.
- (E) **Popup Maker:** This is where you can add or edit the popout maps on the lodging pages.
- (F) **Profile:** This is where you can change personal information, email address or reset a password.
- (G) **Smart Slider:** This is where you will edit or change pictures in the slideshow on the homepage.
- (H) **Screen Options:** This is where you determine which edit options or dialog boxes will display on the CMS page.

## Adding Content Overview

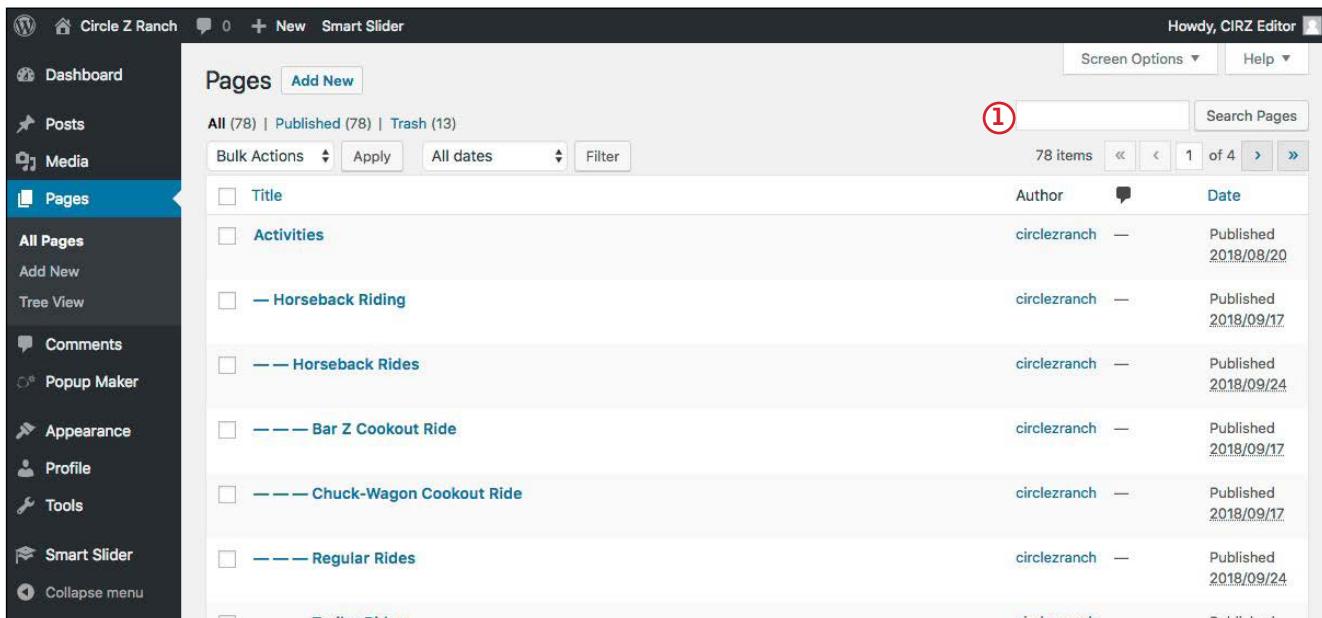
**Posts:** Click Posts in the left navigation column to add or edit posts (articles). You will see the following page.



The screenshot shows the WordPress Posts dashboard. On the left sidebar, 'Posts' is selected. The main area displays a list of posts with columns for Title, Author, Categories, Tags, and Date. Three posts are listed: 'Test Post 3' (Author: circlezranch, Categories: Uncategorized, Published: 2018/09/06), 'Test Post 2' (Author: circlezranch, Categories: Uncategorized, Published: 2018/09/06), and 'Test Post 1' (Author: circlezranch, Categories: Uncategorized, Published: 2018/09/06). A red circle labeled 'A' points to the search bar at the top right of the main content area.

Posts may appear throughout a site, depending on categories assigned to them. They can be programmed to display in various and possibly multiple places, such as a homepage as well as NEWS or EVENTS pages if your site uses them.

To edit an existing post, click the title of it in the main portion of the window. If you do not see the post you wish to edit in the list, enter a portion of the title in the search bar at the upper right (A), then click Search Posts. To add a post, click Add New from the column on the left or at the top of the main portion of the page. You will see the Add New Post window (next page).



The screenshot shows the WordPress Pages dashboard. On the left sidebar, 'Pages' is selected. The main area displays a list of pages with columns for Title, Author, and Date. Several pages are listed: 'Activities' (Author: circlezranch, Published: 2018/08/20), 'Horseback Riding' (Author: circlezranch, Published: 2018/09/17), 'Horseback Rides' (Author: circlezranch, Published: 2018/09/24), 'Bar Z Cookout Ride' (Author: circlezranch, Published: 2018/09/17), 'Chuck-Wagon Cookout Ride' (Author: circlezranch, Published: 2018/09/17), and 'Regular Rides' (Author: circlezranch, Published: 2018/09/24). A red circle labeled '1' points to the search bar at the top right of the main content area.

**Pages:** Click Pages in the left dashboard column to edit existing pages or add a new secondary page (see above).

The Pages list shows the existing pages used in the website. Twenty pages are listed per page by default. You can navigate to the next 20 by clicking the arrows at the bottom right or top right of the page. To quickly find a page in the CMS, WordPress has included a very simple and functional search field on each of the edit pages at the top right (1). If you know a portion of the title of the page, enter it in the search field and click Search. All pages with titles containing the text you entered in the search box will be displayed.

To edit an existing page, click the name in the main column. To add a secondary page, click Add New from the column at left under Pages. You will see the Add New Page window. For edit instructions, please see [page 6](#).



When editing pages, it is helpful to open three tabs or windows in your browser: One with the Media Library, one with the page you are currently editing in the CMS and one tab with the live site in regular view so you can refresh the pages as you go and check your updates.

## Posts

Posts are dynamic content that can be used in many places on a site where content is added or updated regularly such as Blogs, News or a variety of other types of content. Add a new post by clicking Posts, then Add New.

The screenshot shows the WordPress 'Edit Post' screen. On the left, a sidebar lists various menu items like Dashboard, Posts, All Posts, Add New, Categories, Tags, Media, Forms, Pages, Comments, Popup Maker, Appearance, Profile, Tools, Smart Slider, and Collapse menu. The main area is titled 'Edit Post' with a sub-section 'Add New'. A title field contains 'Rough Riders/Best of the Circle Z Season Finale' with a circled '1'. Below it is a permalink field with a circled 'Edit' link. The main content area has a toolbar with icons for Add Media and Add Form, and tabs for Visual and Text. The text area contains two paragraphs of text. The first paragraph starts with 'The newest spec' followed by circled '2c', '2b', and '2a'. The second paragraph starts with 'This years Rough Riders Week, we entertained 16 guests. The first ride, to' followed by circled '2b' and '2a'. The third paragraph starts with 'During our steak night cook out on Monday, we invited musician Joe Barr to' followed by circled '2a'. The fourth paragraph starts with 'On Tuesday, we took guests to the Wagon Wheel Bar. Although the day was windy,' followed by circled '2a'. Below the text area is a thumbnail image of a landscape. To the right of the text area are several metaboxes: 'Publish' (Status: Published, Visibility: Public, Published on: Jun 18, 2018 @ 15:07, Preview, Edit, Move to Trash, Update), 'Featured Image' (Thumbnail of 'Rough Riders 2018', Click the image to edit or update, Needs to be 700px x 525px for Posts and 1400px x 575px for Pages, Remove featured image), and 'Categories' (All Categories: Community, Specials, Day Trips, History, Most Used, circled '3'). Red numbers 1 through 5 are overlaid on the screen to indicate specific points of interest.

Type/paste the title for your post in the top field (1). This will be the headline for your post. Formatting of these has been programmed and is automatically applied.

**Formatting text:** In the formatting bar at the top of the main body area, there is a "Toolbar Toggle" icon (2b) that toggles the next row (or two) of icons on and off. Type/paste text into the main body of your post (2). If you are pasting text from a Microsoft Word document, it is strongly recommended that you first save your Word doc as plain text (.txt). This will remove any formatting that may transfer with the pasted text from Word. It will create a separate document, so you will have your original to follow for style. The second row of icons has a formatting drop-down menu (2c) which allows formatting of text. Use **ONLY** Paragraph style. If needed, you can use the icons in the styling palette to apply bold (formatted to appear blue on your page), italic, underline, bullet lists, indent or change justification, however, anything more than very simple text styling in posts is discouraged.

Photos used with posts are added with **Featured Image** (4). Images added to posts should be cropped and sized BEFORE adding them to the site to **700x625 pixels**. Photos should be optimized to the smallest file size possible (ideally less than 150K) without degrading the image. If larger images are loaded, file sizes may cause longer load times. If you wish to use additional images in your post, these may be added to the body of the article. See page 11 for instructions.

Normally, before you submit (**Publish**) your post, you would need to assign a category (3). Currently the site is not programmed for multiple categories so it can be left uncategorized. You may see categories in the box. These were carried over from the previous website and are not used.

You can preview your post by clicking the Preview button at the upper right of the page. When you are finished with your post, you will need to publish it (5). You have several options. If you are happy with your post as-is, click **Publish** (blue button). If you are not ready to publish your post and have it display on the site, you can click **Save Draft** (5a). This will save your work and allow you to complete it and publish it later. You also have the option of finishing the post and setting a publish date. To do this, click **Edit** (5b) at right of **Publish** immediately in the same box. This will allow you to set a publish date / time.

News posts are arranged by date published on the homepage with the newest post at the top. If for some reason you'd like these rearranged, such as keeping an important post on the homepage, edit the publish date to set the order you want.

## Pages

To edit an existing page, click **Pages** in the left column menu, then select from the list of pages in the main window. If you know the name of the page you wish to edit, enter a portion of the name in the search field and click **Search**. It will display any pages with your search text in the name.

**Note:** If you are adding a page to the existing site, it will NOT appear in the navigation menu. The main navigation is set by a special module which will need to be edited to show the new page. If you need to do so, please contact Partners and we will be happy to help you with this.

The title of your page appears in the top box (1). This displays in large type across the top main image of the page.

Each page needs to have **Parent (2)** and **Template (3)** set. The parent page is the section head under which the page belongs. If you need to move the page in the navigation menu, this is done with the **Menu** module mentioned above.

All pages in a CMS are based on templates. The template determines the base layout and editable areas. The pages in the site should have this preset.

To edit text on a page, type / paste into the appropriate edit region of your page (4). Formatting the body text is the same as for **Posts** (previous page). Remember to save your Word docs as plain text before you start. Failing to do so may cause appearance problems because Word adds hidden formatting code to the text. If needed, you can use the icons in the styling palette to apply bold, italic, underline, bullet lists, indent or change justification.

The example at right is the main Lodging page. This page and most of the others use custom fields that begin below the main edit region of the page (4a). Custom fields have corresponding explanations included above each field describing where it is used and any necessary special treatment. On pages using the **Default Template**, such as the **World Class Birding** page, the photo section is a repeater. To add another group of photos with explanation following, click the blue **Add Row** button.

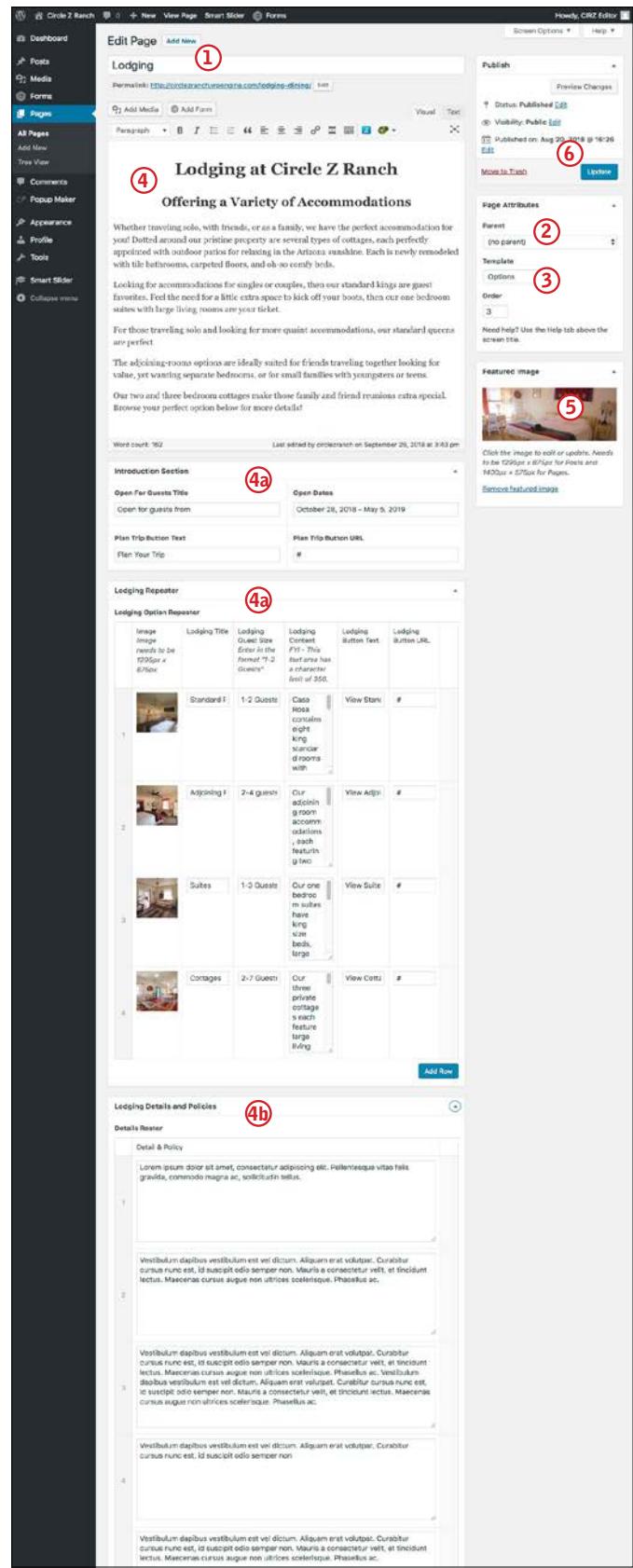
**Lodging Details and Policies (4b)** are edited on this page ONLY. These display on the other lodging pages, but cannot be edited on those.

All templates have an option to add an image at the top right of the page that is added it as a **Featured Image (5)**. Featured images should be sized to **1400 x 575 pixels** BEFORE uploading to the site.

When you are finished with your page, you will click **Update (6)** (if it's a new page the button will say **Publish**). This will save your edits and make the page live on the site. You may need to refresh the live page in your browser to view your edits.

**Revisions:** in the case that something happens during editing where the page ends up in a very unsatisfactory state or something has been lost that was critical to the page, it is possible to restore from a previous version. Near the bottom of the page, you should see **Revisions** you will see previous save dates. Click the date of the revision you wish to restore. This will open a page showing the changes (in html code). To commit to this version, click **Restore this Revision** (blue button). This feature will be enabled on the live site.

**Note:** it is very common in Word or a text editor to use two carriage returns to create space between paragraphs. CSS styling on the website adds space between paragraphs automatically, so if your pasted text has too much space, you may need to delete extra returns between paragraphs.



## Editing Smart Slider

This site currently uses a single slider which appears on the homepage in the top section.

**Editing the slideshow:** from the Dashboard, click Smart Slider in the menu at the left. Click the Homepage slider in the main window to the right. This will bring up the edit options for the existing slideshow.

You can drag the thumbnails to change the order in which the slides display.

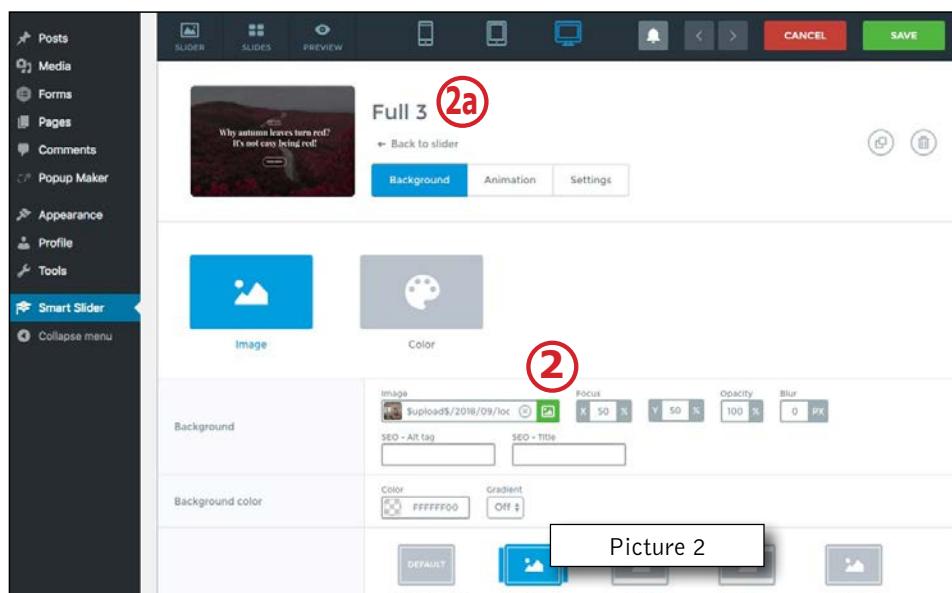
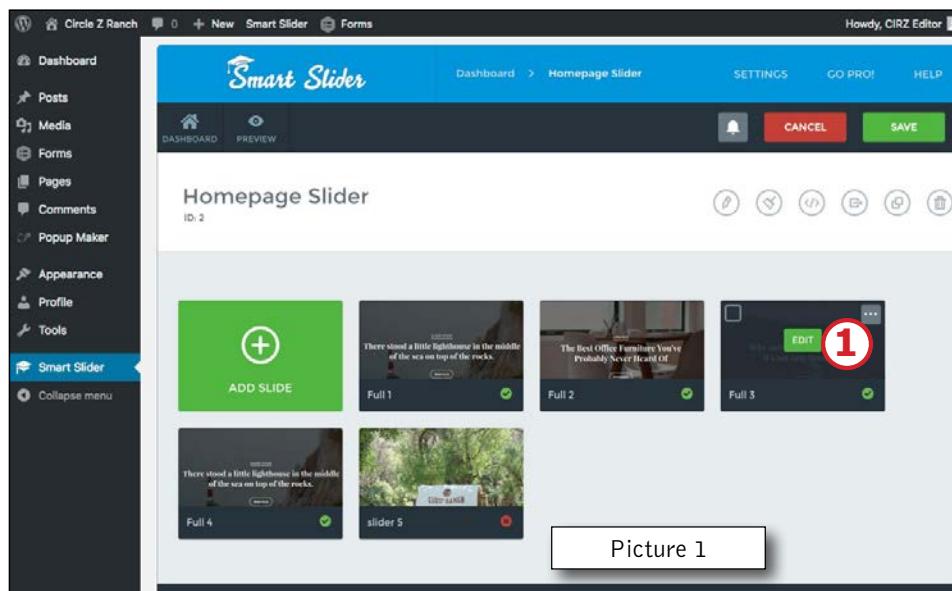
**Slider Images:** To replace the image in an existing slide, click the green Edit button as you hover over the slide in the main window (1) (Picture 1). Click the Background button (blue in Picture 2)

**NOTE:** Slide photos should be sized **EXACTLY** to **1400 x 800 pixels BEFORE** then uploaded to the Media Library before they are added to the slideshow. All images in a single slideshow should be sized exactly the same.

Click the green icon (2). This will bring up the Media Library where you can select the replacement image. Click the green Save button.

To change the text that displays over the image, click either of the existing lines of copy (3). This will open the edit options where you can change the text (3a) or URL (3b).

**Important:** Because settings in this module are somewhat complicated, if you would like to create an additional slide, It's best to duplicate an existing slide and edit that. Click the icon with three dots at the top right of an existing slide ((1) Picture 1) and choose Duplicate from the drop-down menu. Rename the duplicate slide ((2a) Picture 2).Edit the slide as described in the paragraphs above.



## Popup Maker

Popup Maker is used for the ranch maps that open when the button is clicked in the lower sections of the lodging pages.

**Editing the Popups:** from the Dashboard, click Popup Maker in the menu at the left. Click the name of the popup in the main window to the right. This will bring up the edit options for the existing popup. Alternatively, click Add Popup to add a new popup.

Type the name for the popup in the first field (1). Repeat in the field immediately below.

**Popup Images:** Add a new map image by clicking Add Media (2) and select the image from the Media Library. To replace the image in an existing image, click the image, then the x in the menu that appears (2a). Then click Add Media and choose the new image as mentioned above.

**NOTE:** Map images should be sized to **1000** pixels wide **BEFORE** they are uploaded to the Media Library.

Below the main content region should be the Popup Settings (3). In the Triggers section, click Add New Trigger (3a) or click the pencil icon to the right of the existing trigger to change it. The trigger should be lower-case, have dashes (-) instead of spaces and begin with a dot (example: .cottage-2).

On the corresponding lodging page, you will add the trigger text in the **Popup Name Selector** field within the **Ranch Map Section** (Picture 3). Note that the dot preceding the make is removed.

In the Display (3b) section, set **Size** to **XLarge** and **Max Width** to 1000 pixels like the example in Picture 4.

All (8) | Mine (1) | Published (8) | Trash (1)  
Bulk Actions Apply All dates Filter  
Name Title CSS Classes Opens Date  
Cottage 1 Cottage 1 popmake-5195 | popmake-cottage-1 7  
Cottage 2 Cottage 2 popmake-5193 | 3  
Published

Cottage 2  
(Required) Register a popup name. The CSS class 'popmake-{popup-name}' can be used to set a trigger to display a popup.  
Cottage 2  
(Optional) Display a title inside the popup container. May be left empty.  
Add Media Form Visual Text  
Paragraph B I « »   
Word count: 0 Last edited by CIRZ Editor on September 28, 2018 at 8:51 pm  
Popup Settings  
Triggers Triggers cause a popup to open. Add New Trigger  
Targeting Type Cookie Settings Actions  
Display Close Advanced  
Click Open None Extra Selectors: .cottage-2  
Cookies control the repeat display of a popup. Add New Cookie

Comments  
Popup Maker  
Appearance  
Profile  
Tools  
Smart Slider  
Collapse menu

Popup Name Selector  
Enter the name of the css selector that matches the one you entered into the popup maker selector.  
cottage-2

Add Popup  
Popup Themes  
Extend  
Help & Support  
Appearance  
Profile  
Tools  
Smart Slider  
Collapse menu

Word count: 0 Last edited by CIRZ Editor on September 28, 2018 at 8:42 pm

Popup Settings  
Triggers Appearance | Size | Animation | Position | Advanced  
Targeting  
Display 3b  
Close  
Advanced  
Size X Large - 95%  
Select the size of the popup.  
Min Width 0 %  
Set a minimum width for the popup.  
Max Width 1000 px  
Set a maximum width for the popup.

## Adding Links

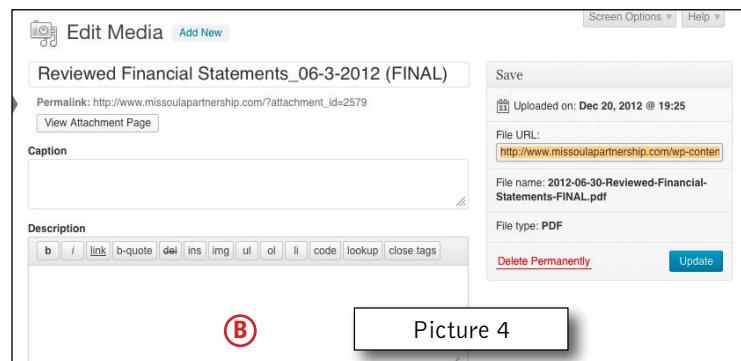
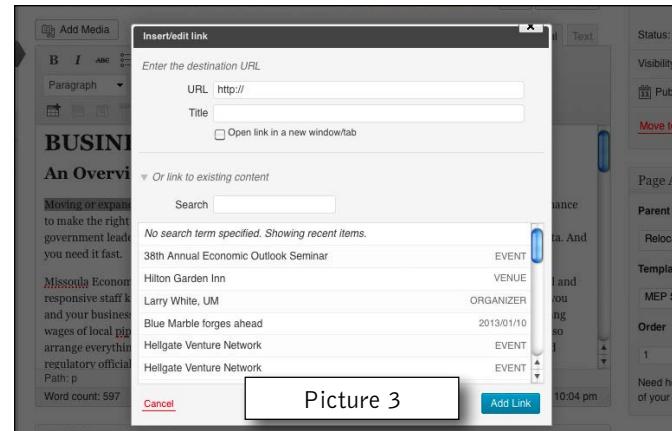
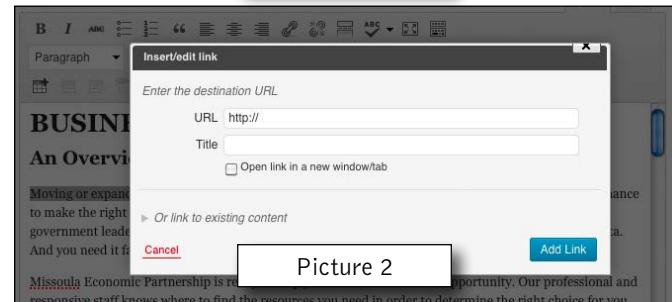
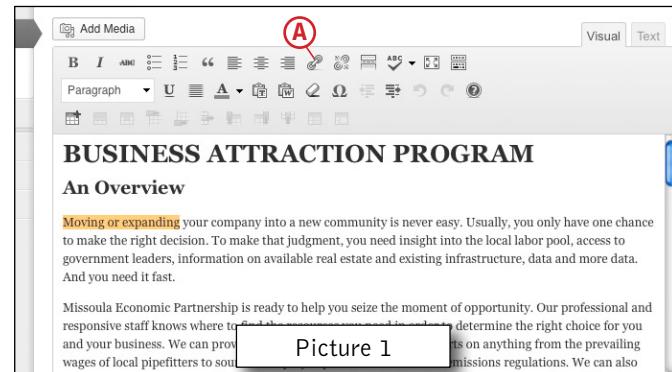
To add a link to text or an image that will take you to a page within your site, or to add an external link, highlight the text or if adding a link to a photo, click to select it. Then click the Link icon (**A**). Enter the URL of the page to which you wish to link (**including the http://**). If the page is within your site, expand the Or link to existing content option (Picture 2). Scroll through the list, select the page to which you will link (Picture 3), then click Add Link.

Links to PDFs and pages outside the site are normally set to open in a separate window. To do this, check the Open link in a new window box below the Title field (Picture 2).

If you wish to link to a file such as a PDF within your site, there are a few steps involved. First, upload the PDF to your Media Library (see next page). If the document has already been uploaded to your Media Library, click the name of the document. You will then highlight and copy the File URL (Picture 4). Return to the page on which you wish to add the link. Next, highlight the text to which you will link (Picture 1). Click the Link icon (**A**, Picture 1). Paste the address into the URL box (Picture 2) and click Add Link.

To add a link to an email address, you will add this in the URL field. The proper syntax for an email link is mailto:user@domain.com (no spaces).

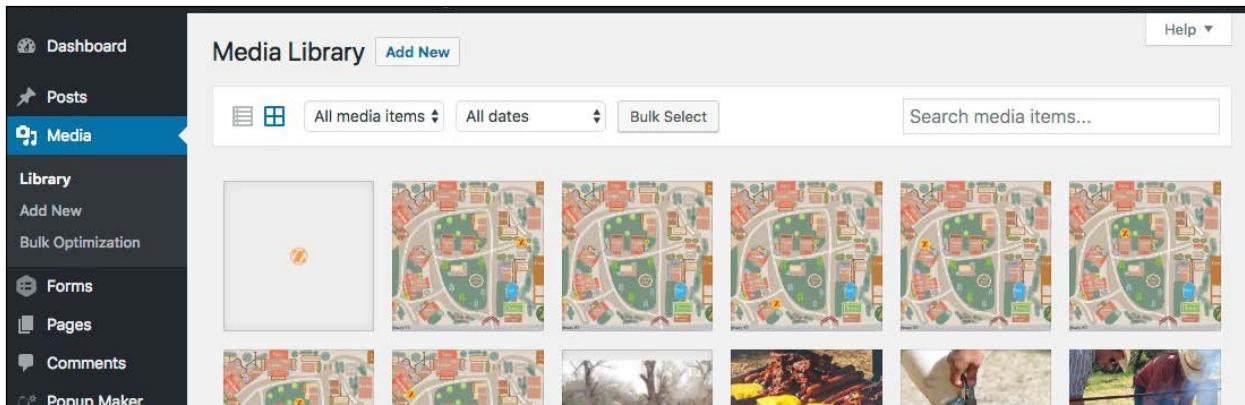
When you are finished, click Update to close the dialog. If you are finished editing your page, click the blue Update button in the Publish area at the upper-right of the page. View the page in your browser to confirm the updates have been made to your satisfaction.



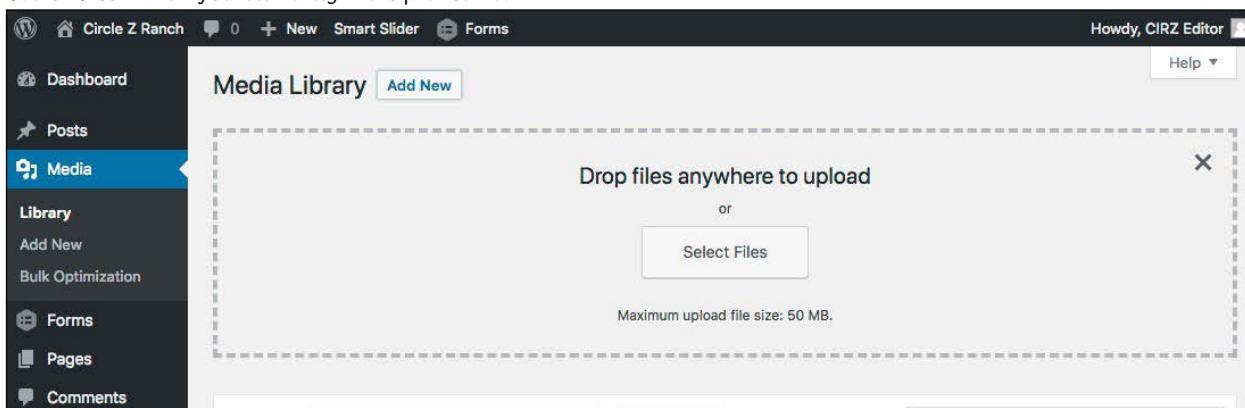
**Tip** Once you add a photo to a page, even though you may not save the page, or if you delete the photo before saving, it remains in your Media Library. If you want to use that photo in a different place, or add it again, try adding it first from the Media Library. Every time you drag or add a photo from your computer, it adds it again to the Media Library. It's easy to accumulate several instances of the same photo in your library.

## Media Library

The Media Library contains pictures and linked documents that you will use on your site. To view your Media Library, click Media in the left column of your dashboard. This will display a thumbnail list of all your media items.



You can scroll through the items or use the search to find a specific file. Click a thumbnail to view information about the item. You can add items by clicking Add New at the top left of Media Library (see above). This will bring up the Upload window (below) to which you can drag multiple items.



**Note:** Although the CMS has some features for sizing photos, it is recommended that you know what size the photo needs to be on the intended page and size it appropriately BEFORE uploading it to the Media Library or page.

**Note:** Before uploading a PDF or other document to the library, be sure it is named appropriately. Clear file naming will help you later as you search the media library — and also the visitor on your site, who will see it when downloading it.

After your media item uploads, click the thumbnail image in the main window. This will open the details window where you can change Title, add a Caption, Alt Text or Description. You should always enter **Alternate Text**. This is important for text readers and text-only browsers so they have a description of the image. It also helps search engines index images on your site, thereby inviting people to your site through image searches. When finished, click **Update**.

**Adding Pictures:** To add a picture to your post or page in the body of your text, click the insertion point ahead of the text where you would like the image to appear. Click **Add Media** above the formatting bar (1) below. This will take you to the Media Library where you can select an existing image or upload a new one (see next page).

A screenshot of the "Edit Page" screen in the WordPress dashboard. The left sidebar shows links for Dashboard, Posts, Media, Forms, Pages (which is selected and highlighted in blue), All Pages, Add New, Tree View, and Comments. The main content area is titled "Edit Page" with a "Add New" button. The page title is "Horseback Rides" and the permalink is "http://circlezranch.wpeengine.com/activities/horseback-riding/horseback-rides/". There is an "Edit" link next to the title. Below the title is a toolbar with "Add Media" (highlighted with a red circle containing the number 1) and "Add Form" buttons. The toolbar also includes "Visual" and "Text" tabs, and icons for Paragraph, Bold, Italic, and various list formats. In the bottom right corner of the main area, there is a large heading "Experience the Extraordinary". On the right side of the screen, there is a "Publish" sidebar with "Screen Options" and "Help" buttons. Under "Publish", there are sections for "Status: Published" (with an "Edit" link), "Visibility: Public" (with an "Edit" link), and "Published on: Sep 24, 2018 @ 16:26" (with an "Edit" link). At the bottom of the sidebar are "Move to Trash" and "Update" buttons.

**NOTE:** Main pictures on the site should be added as a **Featured Images** on the page. The following instructions are for adding pictures to the **body of the page or post** with the text.

## Adding Pictures (continued)

After clicking the **Add Media** button you will choose one of the following options: **Upload Files** or **Media Library** (Picture 1). Another option is **Insert from URL**, but it is not recommended that this be used. If the photo you wish to add is not already in the **Media Library**, drag the desired picture to the upload box (1) or browse to your picture. You will see the options below (Picture 2). If your image is sized correctly and has been added to your **Media Library**, choose that option. From the list of thumbnails, choose the desired image and click the thumbnail. Add the **Alternate Text**, select the size (normally the **Full Size**), then click **Insert Into Post**.

**Note:** when adding photos or PDFs to your Media Library, it is recommended that you NOT change the title of the file (picture 2 (A)). Changing the title will change the name of the file in your Media Library.

**Picture 1**

Drop files anywhere to upload

Select Files

Maximum upload file size: 8MB.

**Picture 2**

ATTACHMENT DETAILS

URL: http://flatheadlakers.wpe...  
Title: lake\_info  
Caption:  
Alt Text:  
Description:

ATTACHMENT DISPLAY SETTINGS

Link To: None  
Size: Full Size - 359 x 269

If your picture spans the entire edit region, make sure you put a carriage return after the image so your text starts at the appropriate place below it. If your picture is smaller and you want the text to wrap around it, you will need to set alignment. To do that, click the picture, then click the edit icon (circled in Picture 3 below).

**Picture 3**

**Picture 4**

Image Details

Link To: None

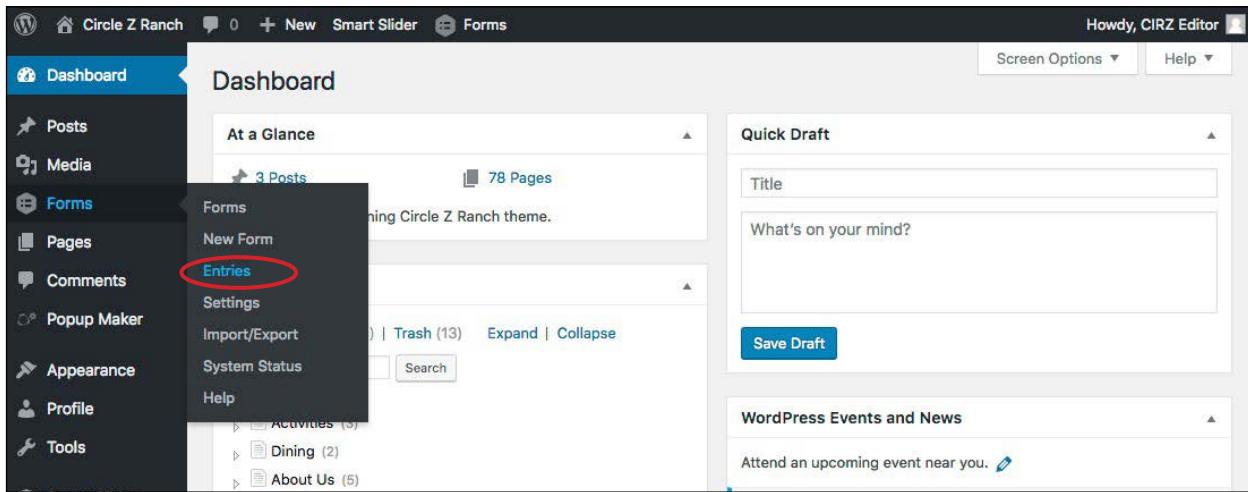
From the resulting dialog, set alignment, add **Alternate Text**. If you need to add a border, vertical and/or horizontal space, this will need to be added as html code once your picture has been placed.

**Note:** By default, every image added to a page has a Link URL. It is recommended that set this to None (B, Picture 2), as it will only take the viewer to a separate view of the same picture. If you wish to link to the picture, use the link tool as shown on Page 8.

When you are finished, click **Update** to close the dialog. If you are finished editing your page, click the blue **Update** button in the Publish area at the upper-right of the page. View the page in your browser to confirm the updates have been made to your satisfaction.

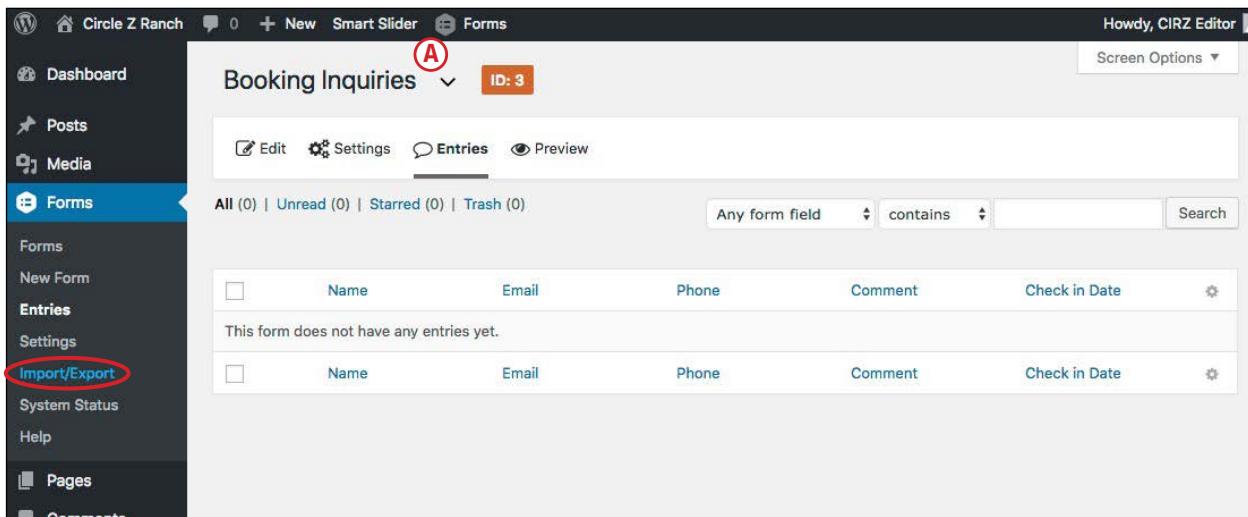
## Forms

Some sites will use forms to collect various types of data. To view the entry data on any of the forms, from your Dashboard (or anywhere in the CMS), mouseover **Forms** in the left column and select **Entries** from the pop-out menu.



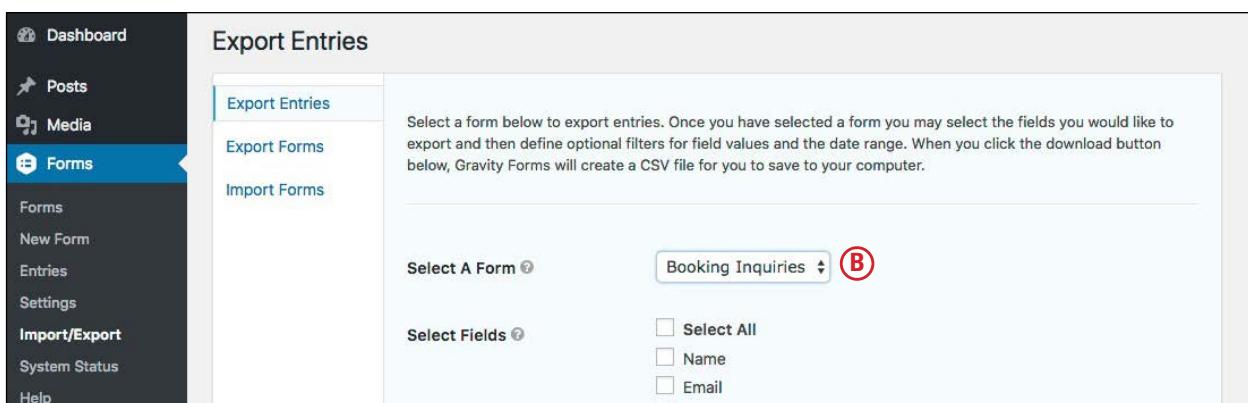
The screenshot shows the WordPress dashboard with the 'Forms' menu item highlighted. A sub-menu has appeared, showing options like 'Entries' (which is circled in red), 'Settings', 'Import/Export', and 'System Status'. The main dashboard area shows 'At a Glance' statistics: 3 Posts, 78 Pages, and a list of categories: Activities (3), Dining (2), and About Us (5). To the right, there's a 'Quick Draft' section and a 'WordPress Events and News' section.

If your site has only one form, it will take you to the entry data for that form. If your site uses multiple forms, you will be taken into the first form sorted alphabetically. To view the entry data for a different form, click the **Switch Form** drop-down (**A**) and select the form you wish to view. Entries for that form will display on the resulting page.



The screenshot shows the 'Booking Inquiries' form entries page. The 'Entries' tab is selected. The top bar includes 'Edit', 'Settings', 'Entries' (with a red circle 'A' over it), and 'Preview'. Below is a search/filter bar and a table header for columns: Name, Email, Phone, Comment, Check in Date. A message states 'This form does not have any entries yet.' The left sidebar shows the 'Import/Export' option circled in red.

You can print the page as-is or download the form data as a .csv formatted file. This file can be opened with MS Excel or similar database program. To download the data, click **Import/Export** below **Forms** in the left menu (circled above). You will next select the desired form for which you will export data (**B**), then select the appropriate fields. You can also select a date range to limit the entries further. Click **Download Export File**. Name the file and save it to your computer.



The screenshot shows the 'Export Entries' page. The left sidebar has the 'Import/Export' option circled in red. The main area has sections for 'Export Entries', 'Export Forms', and 'Import Forms'. It includes instructions about selecting a form and defining export fields. A 'Select A Form' dropdown is shown with 'Booking Inquiries' selected (circled in red). Below it, 'Select Fields' is set to 'Select All'.