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SUPPORT + MANAGEMENT + WORDPRESS

Cheat Sheet for myclient.com

This document includes step-by-step instructions for the following tasks:

All cheat sheets begin from the Dashboard. To get to the dashboard, login using your username and password at

https://myclient.com/wp-admin

Administratively Add a New User

Summary: This is sometimes necessary when a member joins through AMHCA or they mail in their payment. It requires us going into the website and manually adding a user.

*Go to https://myclient.com/member-registration/ and fill out the member registration form. The member will get an email that prompts them to continue completing their application online.

Note: It is imperative that they complete their portion of the application. They must do this in order to log in.

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Administratively Finish an Incomplete User

Summary: When a member first creates a user name and password for the site, they are creating a user account, but not completing the process. In order to complete the process, they must complete a member application. There are times when members do the first part, but not the second. As an admin, you can finish the process for them if you have all of their information.

1. Go to the Dashboard and then Users
2. Click “incomplete” users
3. Scroll down to the user that you would like to complete.
4. Roll your mouse over their user and you will see “switch to”.
5. Click “Switch to”. This will switch you to their user account and you can use the site like you are logged in as them but without having to know their un and pw.
6. You will now see the button for the membership application.
7. Click the membership application and complete it. Click submit when done.
8. Once you have done this, go to the very bottom of the page (left hand corner at very bottom) and click the link to switch back to your own user account. Then you can proceed using the site as yourself.

Here is a link to a video which shows how to do this.

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Administratively Edit a User’s Role

Subject: The user role determines what access a member can have. If they are inactive, then they cannot access certain parts of the site. An incomplete user is a user who hasn’t finished their membership profile. An active member is obviously active.

1. Go to “Users”
2. Find the user that you wish to change the role for.
3. Click the membership ID. (Note - This ID may be a number, or it could be an alpha-numeric user name)
4. Scroll all the way to the bottom of the user profile and check the role that you wish to change to.

Administratively Edit a User (Mailed in Renewals)

Summary: When a member renews by mail, we have to edit their information on the website.

1. Roll mouse over "myclient Member Management"
2. Click "Edit Member"
3. Use search box to in top right to find the name of the member.
4. Click Members name and then click the edit button on the right and edit member data. Make sure to click update when done.

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Change Public Profile Information

Summary: If member has a public profile and they wish for that information to be changed on the public profile

1. Roll mouse over "myclient Member Management"
2. Click "Edit Public Profile"
3. Use search box to in top right to find the name of the member.
4. Click Members name
5. In the box called, "Find a Clinician Registry Fields" make needed changes. Make sure to click update when done.

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Export Members

Summary: This will allow you to export a .csv file of all of the members. This also allows you to select which fields you wish to export as well as a date range.

1. Roll mouse over "myclient Member Management"
2. Click "Export Members"
3. Select Member Application from the drop down menu and check the fields you wish to display on the export file, then click "Download Export File"

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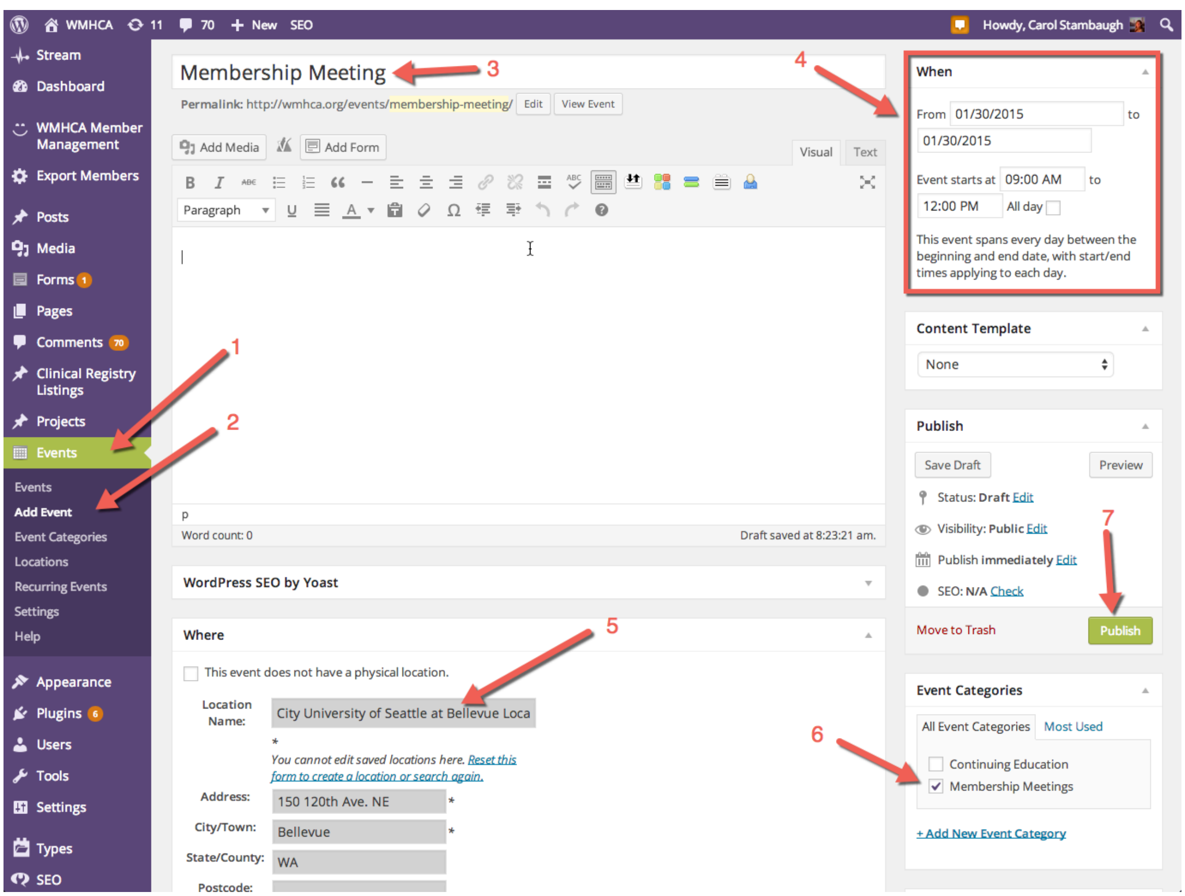
Managing Events

Summary: There are a couple of different management tasks included below.

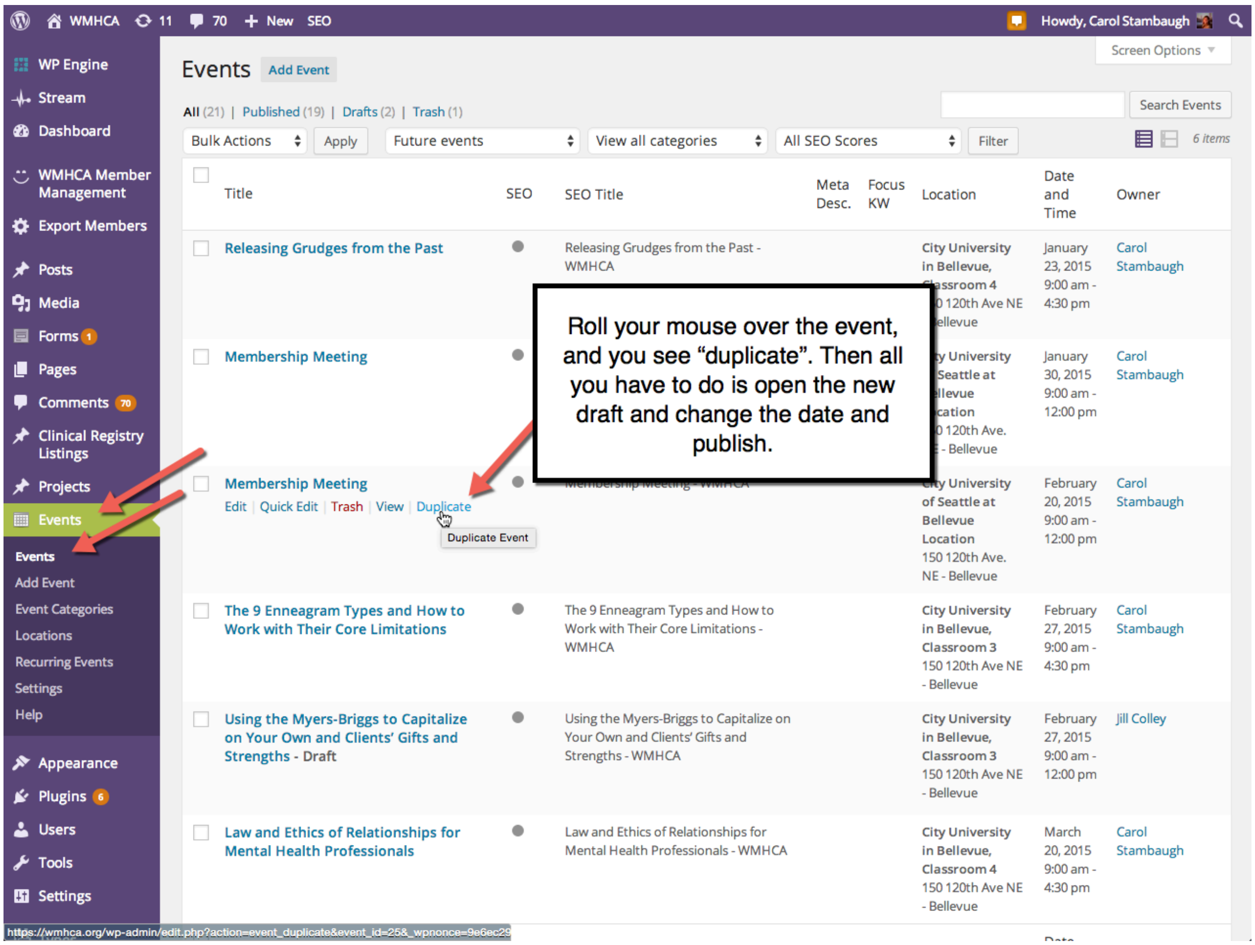
Adding Membership Meeting Events

1. Click Events
2. Click Add Event
3. Add the title of the event and add any description that you wish to add to the main content area
4. Add the date and time in the “When” Box
5. Add the location. (Note, a location that is used over and over again, can be added and saved by clicking locations. Any saved locations will show up when you begin typing)
6. If your event has a category, make sure to select the proper category.
7. Not shown below - Scroll down to the excerpt and paste the information that you want to show in the Continuing Education Listing page (the page that lists all events) https://myclient.com/events/categories/cont-ed/
8. Click publish.



Duplicating an event

1. Click Events to show the full event listing.
2. Roll your mouse over the event and you will see “duplicate”. Click duplicate.
3. Open the new draft, change the content, date and all relevant information and then click publish.



Editing the Excerpt on Events

Summary: The content that shows on the archive page (ie. https://myclient.com/events/categories/cont-ed/) is found in the excerpt area of each event.

1. Enter the event into the excerpt area. Note that you must use html in this area. (Hint - you can add a new post and create the content there and then click to the text tab and copy the html) Be sure to delete any new random posts that you create.

2. To create the "Get Details" button, simply open an older event and copy the button code from the old page and add it into the excerpt area. Make sure to change out the link to the new link.
3. Test, test test - Go back to the listing page and test to make sure that your Get Details button goes to the right place.

Add New Registration Form to an Event

1. Go to an old form that is similar and duplicate the form.
2. Change the information in the copy (including title, price, etc). When changing the price, make sure the change it in the form field and in the field description.
3. Add the Stripe Feed through Form Settings - This is important because this is how you get paid. Make sure to use a products and services feed.
4. When setting up the Stripe feed, make sure you set the conditional for payment option -> credit card. This will make the feed fire when they pay by credit card, but not by check.
5. Go to event and then add the form to the very bottom of the event.

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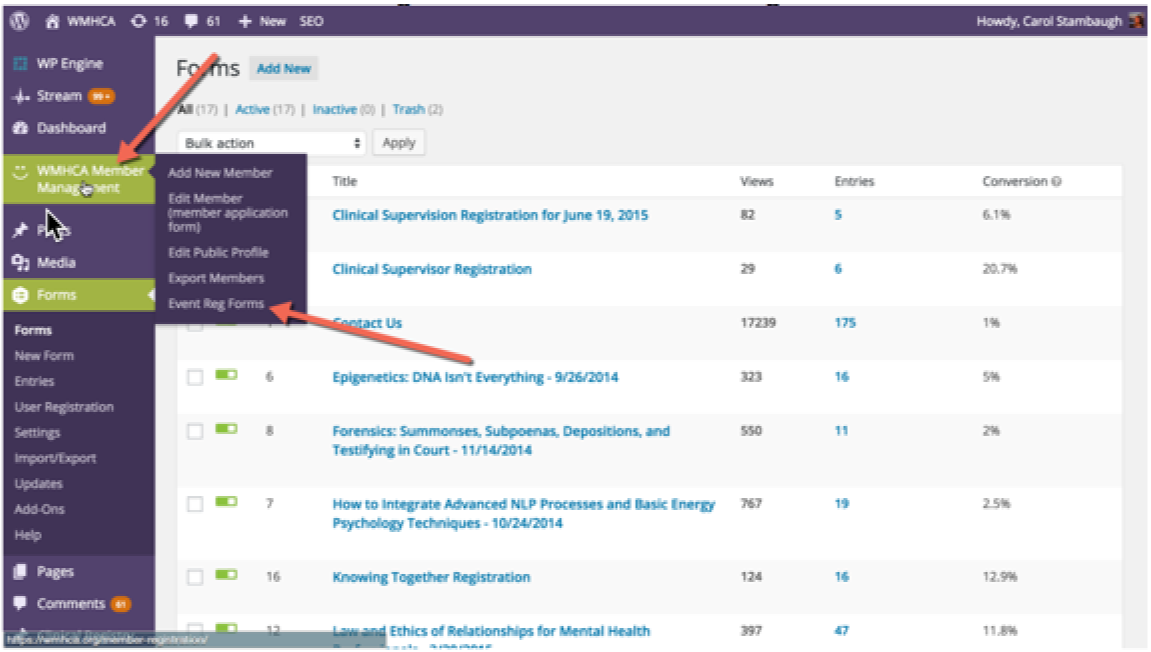
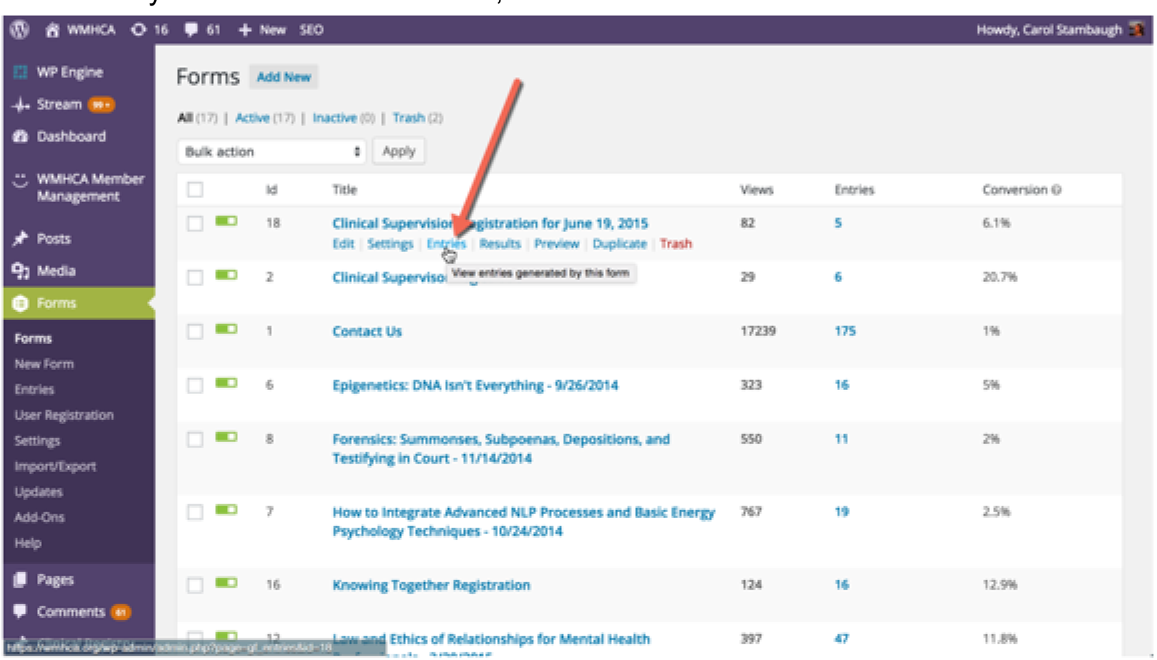
Resend Registration Email Notifications

Summary: At times, an attendee may call and say they did not receive their email notification. Here are the steps to resend them.

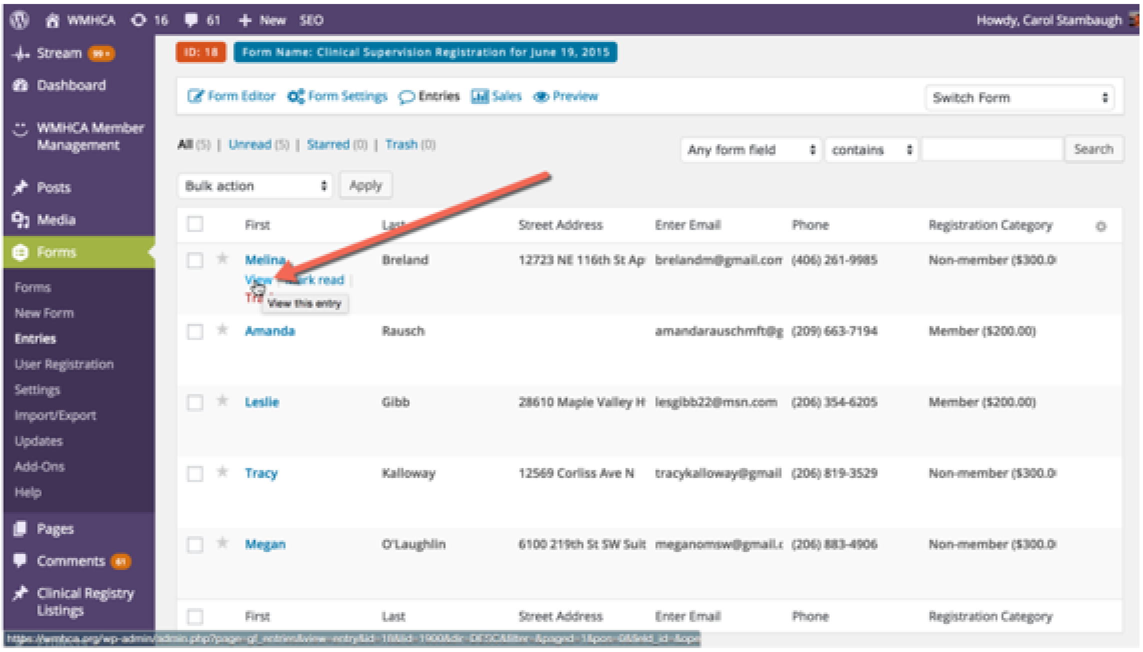
1. Click myclient then Click "Event Reg Forms"



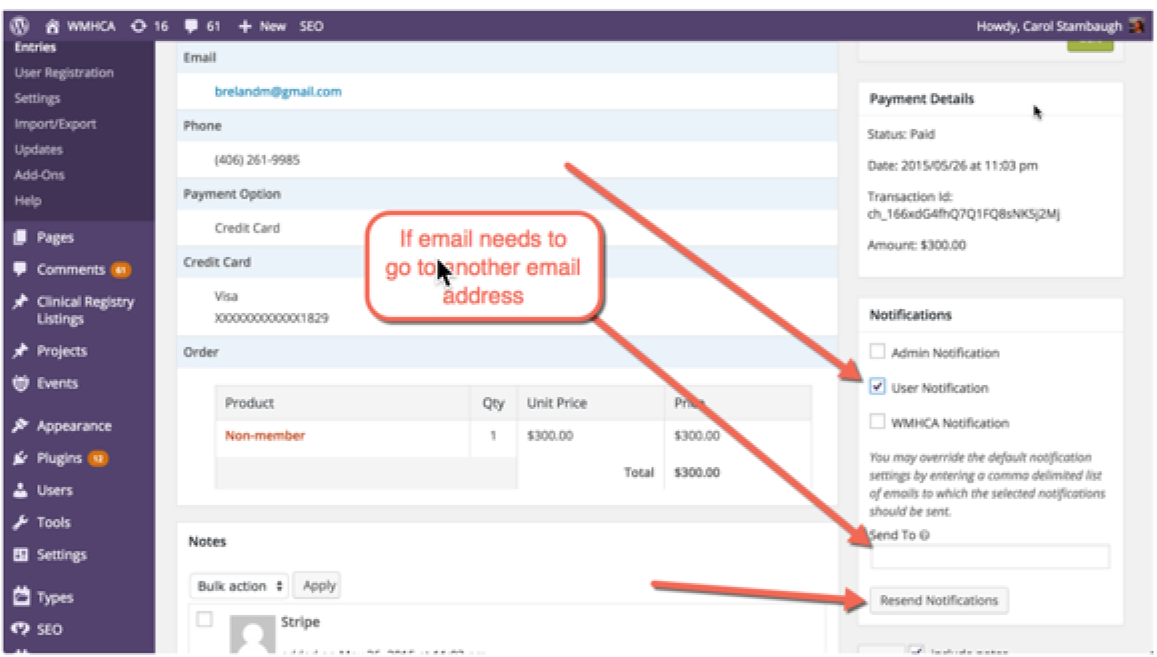
2. Roll your mouse over the event, then click "entries"



3. Find the attendee who needs the information resent and click “view”.



4. Click user notification which sends the registrant email again. It will automatically send to the email that they used. If they need it sent to a different email, then add the new email and click “resend notificaitons”



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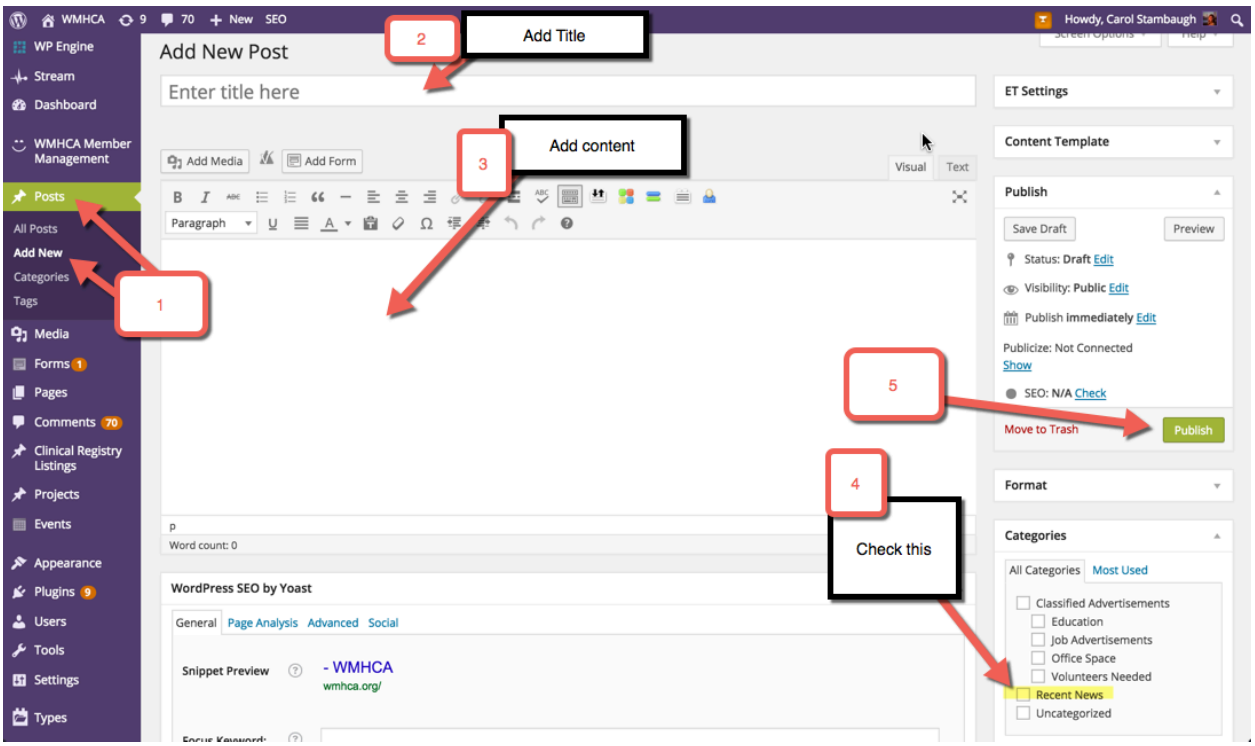
Add New Post to Recent News

1. Click “Posts” and then “Add New”
2. Add the Post Title
3. Add Content
4. To make sure that this shows up in Recent News, check this category.
5. Click “Publish”



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Edit the “About Speakers” buttons on the Continuing Education List

Summary: The Event Listing page (https://myclient.com/events/categories/cont-ed/) is a listing of all of the events and then you click on the event to get to the single event page. This Event Listing page sometimes contains a button that opens a .pdf with the speaker bios. These instructions describe how to do this.

1. Upload the .pdf document of the speakers bios to the Media gallery.
2. Once uploaded click on the new document and copy the url of this document. Save this url somewhere.
3. Open the event that you wish to modify. Go down to the excerpt area and add the following code to the excerpt: About the Presenter

**Note change the text inside the quotation marks to be the exact url of the document that you just added to the media. Also, replace Presenter Name with the actual presenters name.*

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Managing Classified Ads

Summary: The classifieds are simply using the post and category system. To add a classified, add a post and use the categories to select what type of advertisement it is.

Add New Classified

1. Click posts and then "add new".
2. Complete the title, content area and excerpt.
3. Make sure to use the category Classified Ad
4. Click Publish

Remove Classified

1. Click posts and locate the ad/post that you wish to remove. You can use the search button.
2. Either delete the post, or save it as a draft and it will no longer show up.

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Working with Coupon Codes

Summary: A coupon code can be added that will allow members to use the coupon for a discounted rate.

[View tutorial video here]

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