

True North (truenorthpropmgmt.com)

Organization Overview - User

The site is organized by Association users. Most users are associations. All association users are 'subscribers', that is, they cannot edit content, they can only view content. The association's page is private; only someone logged in as an association user can see their page.

There are two administrative users. Admin, used by True North, and dgk Consulting. Both admin users have access to all WordPress features & functions.

Organization Overview - Technical

The site uses WordPress, version 3.8.1 (the latest). It also has the following WordPress plugins installed:

- BAW Login/Logout menu (adds login/logout to the menu)
- Contact Form 7 (used to build the email forms: Contact Us and On-Line Maintenance Request)
- Easy Columns (used to design pages with columns)
- Insert PHP (allows PHP code within a page)
- Peter's Login Redirect (used to send users to their Association page)
- Shortcodes Ultimate (adds shortcode feature for editing)

To login to the site as an administrator with full editing capabilities, use your site's normal URL address in the web browser of your choice:

<http://www.truenorthpropmgmt.com>

Login using the menu.

- UserName: Admin
- Password: TN\$management

When you first log-on, you'll see the "Dashboard". You use the Dashboard to perform the following actions. On the next few pages, I have a screen shots of each action.

- **Add a User**
Adding a user is a two-step process. First you add the user (Name, Email, and Password are required.) I suggest you use TN's standard AOL email address. Then you need to modify their profile.
- **Edit User's Profile**
Here's where you can change any user information. The most common usage is to change the password. **However**, for an Association user, you always want to prevent them from using the Dashboard. Make sure you uncheck the "Show Toolbar When Viewing Site" box (see screen shot).
- **Add Association Page**
There's a standard template for creating a new Association page. It has placeholders for all the normal fields.
- **Redirect new user**
Use this feature to send a logged in user to their page. When they come back to the home page, there'll be an added link to return to their Association page.
- **Edit a Page**
You can edit pages in "Visual" or "Text" modes. Visual is a WYSIWYG view, but has a few quirks. Text mode is for coding raw HTML or PHP. The HOME page is a good example of a page with both HTML and PHP. You shouldn't need to do anything in PHP.
- **Upload a file**
This is where you upload pictures in .PNG/.JPG format or documents in .PDF format. You can upload multiple files at the same time. You can also upload files as you edit a page; use the ADD MEDIA button and upload from there.

When doing any editing, **ALWAYS publish, update, or save the page BEFORE** you leave the page. If you don't you'll lose your edits. Edits made to a page are not 'live' until you UPDATE or PUBLISH the page. You can REVIEW your edits before you save the UPDATE.

Screen shots:

Add a User

Add a new user. I suggest you use a phony email address, not the users real email. You could use your standard AOL email address. You would also use this screen to change a user's password, or any other information. After you add a user, you need to change their user profile so they can't get into the Dashboard.

Add New User

Create a brand new user and add them to this site.

Username *(required)*

E-mail *(required)*

First Name

Last Name

Website

Password *(required)*

Repeat Password *(required)*

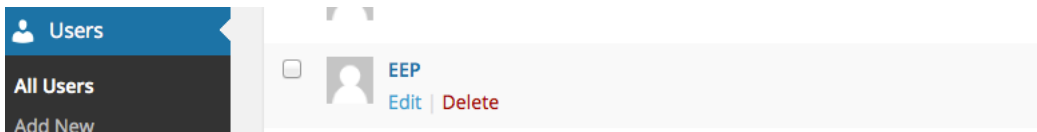
Strength indicator Hint: The password should
? \$ % ^ &).


Send Password? Send this password to the new user by email.

Role


Edit User's Profile


After you add a user, you need to edit their profile to lock them out of the Dashboard. Go to "All Users", select the one you want to edit and click Edit.





 Users

All Users
Add New
Your Profile

 Tools

 Settings

 Shortcodes

 Collapse menu

Keyboard Shortcuts Enable keyboard shortcuts for comment moderation. [More info](#)

Toolbar Show Toolbar when viewing site

Name

Username Usernames can't

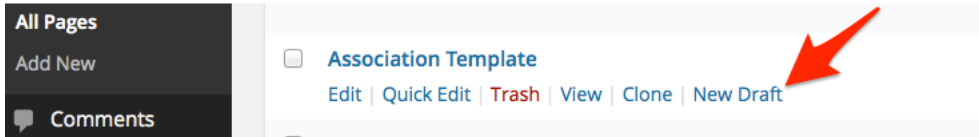
Role



**If checked, uncheck. This lets
have access to the Dashboard**

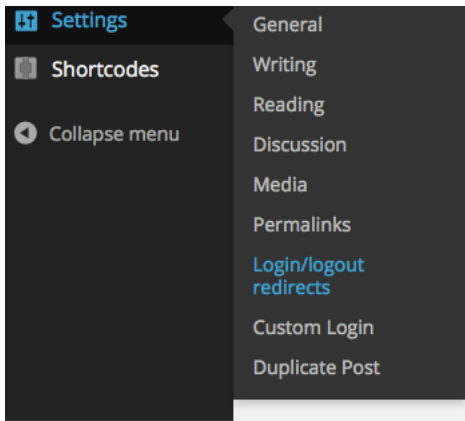
Add Association Page

Use the Association Template page as the starting point. Click the New Draft option. It will open a new page with the template fields. Name that page the same name as the Association User (this is important, in the PHP code we use the user name to find the association page)



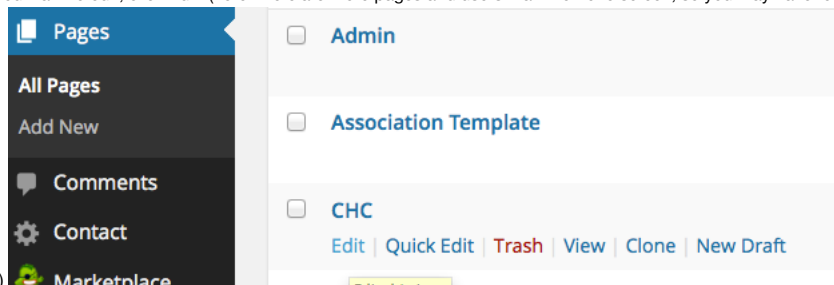
Redirect new user

This is where you tell the system where to send a user when they login. Since users and their association pages are named the same, this is easy. I set the logout redirect to take them back to non-logged in home page.



Edit a Page

Hover over the page name you want to edit; click Edit. (note: there are more pages and users that fit on one screen, so you may have to click on the next



page selector at the bottom)

Upload a file You can upload in batches or one at a time. You can also upload while editing.

- Dashboard
- Jetpack
- Posts
- Media**
- Library
- Add New
- Pages
- Comments
- Contact
- Marketplace

Upload New Media

Drop file or select from library

Select

You are using the multi-file uploader. Problems? Try the [browser uploader](#) instead.

Maximum upload file size: 64MB.