

# Client Training Manual

Thank you for choosing Planeteria Media. We are dedicated to setting you up for success in maintaining your website. Below you will find basic and advanced tutorials. Please use the Table of Contents to jump around as this document is quite lengthy. This document is also a living document so more items will be added! Disclaimer: some information on this manual may not be relevant to your site. Please skip these areas. If you are unsure or are in need of additional information that is not in this manual please email Planeteria's Support team at [support@planeteria.com](mailto:support@planeteria.com) and we will be happy to add tutorials here as soon as we can.

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## Introduction

### What is Wordpress?

WordPress is a Content Management System (CMS). This means that it stores, organizes, and displays content provided by you. This content can then be changed by you or interacted with by a user.

If you are interested in learning more about WordPress and its endless possibilities, check out their website at [wordpress.com/about](https://wordpress.com/about).

### The Dashboard

The Dashboard is where you edit your site. This area is also called the Backend. Note the Dashboard will look different according to your site and user status: you may not see some of the tabs described below.

### Sign In

To sign in to your Dashboard (the backend), follow these steps:

1. Go to your Testing site URL
2. Enter your username and password
3. Click on Log In

### Tabs

**Note:** If you do not see a tab on your Dashboard, your organization has opted not to include this feature.

### [News/Posts](#)

The Posts (or News) tab is where you will find your News content. Posts are usually used for dated, periodic content like blog updates and news stories.

## Media

The Media tab is where you will find all your multimedia items: Images, videos, documents, PDFs, and audio files all live here. You can organize content into folders, make subfolders, and tag things for directories.

## [Forms & Submissions](#)

Forms allow you to collect data from users of your website. Examples are email address, phone number, mailing address, whether they are interested in signing up for a newsletter. Forms can also be used to sell products.

## [Pages](#)

The Pages tab in the Dashboard is where you create, edit, and remove pages from your site.

Pages are used to organize content into relevant sections and make it pleasing to the eye of the users. Pages are different than Posts in that Pages are not dated, and the content within them usually doesn't change.

## [Meetings/Events](#)

The Meetings and Events section in the Dashboard is where you create, edit, and remove meetings and events from your site. You can create individual meetings or events or set up recurring meetings. In meetings, you can upload Agendas and Minutes. You can add content to expand on the meeting or event details.

## Departments/Divisions

The Departments and Divisions tab is where you will find your organization's departments and subdivisions within them.

## People

The People tab is where you will find information about employees from your organization. You can add, edit, or remove people, which will automatically update wherever the staff is populated on your site. An excellent way to handle staff turnover, a name that can be changed once and is then updated all over the site.

## Resources/Resource Library

The Resource Library tab is where you can find PDFs organized by category. Then filters are created on template pages, and the resource is loaded to a page with a single click. Similarly, updates and resource changes are done in one place, which then affects the entire site.

## FAQs

The FAQ section is where you can enter frequently asked questions; wherever this functionality is featured on your site, the questions will automatically populate. Pre-formatted for a Question-and-Answer type format, you only need to fill in the blanks.

## Projects

The Projects tab is where you can categorize projects into “buckets,” such as current and future projects; these are then plugged into regular pages by way of templates.

## RFPs

The RFP (Request For Proposal) tab is where you can enter RFP information, and wherever the RFP functionality is populated on the site, RFPs will auto-populate on those pages.

## Appearance

The Appearance tab is where you can view and manipulate your site's menus. You can have multiple menus, such as the main navigation menu and the footer menu. Drop-down items are also set up here.

## Users

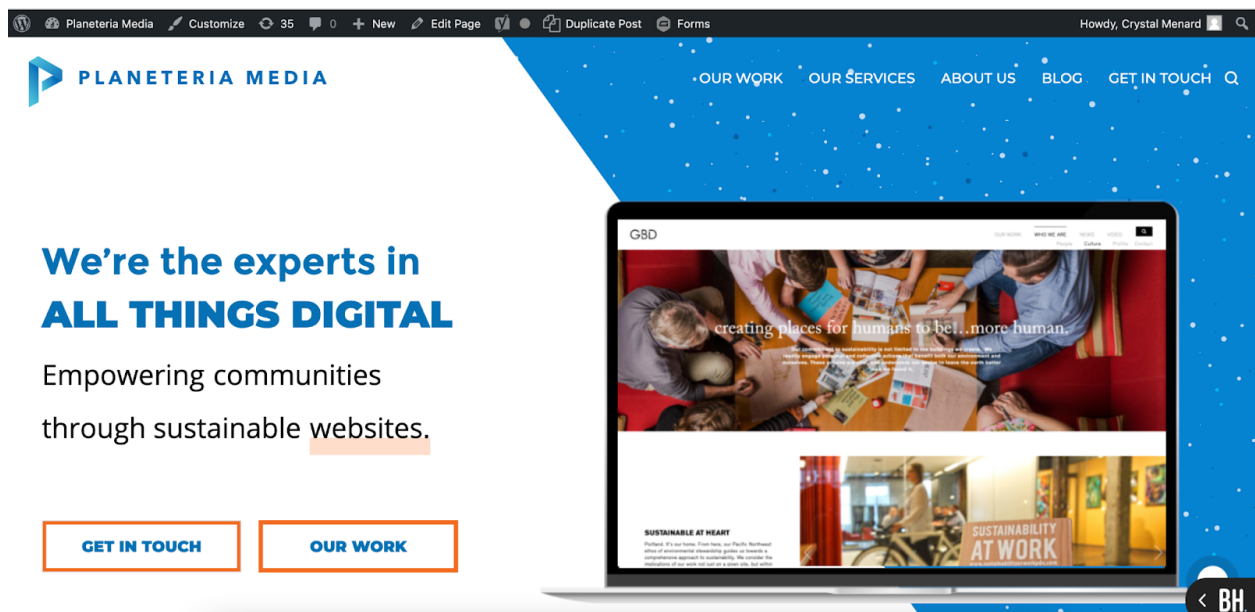
The Users tab is where you can manage users with access to the backend. You can add as many users as needed, remove them, and update their roles (i.e., editor, administrator).

## Frontend Vs. Backend

Your website has two main parts: the frontend and the backend.

### Frontend

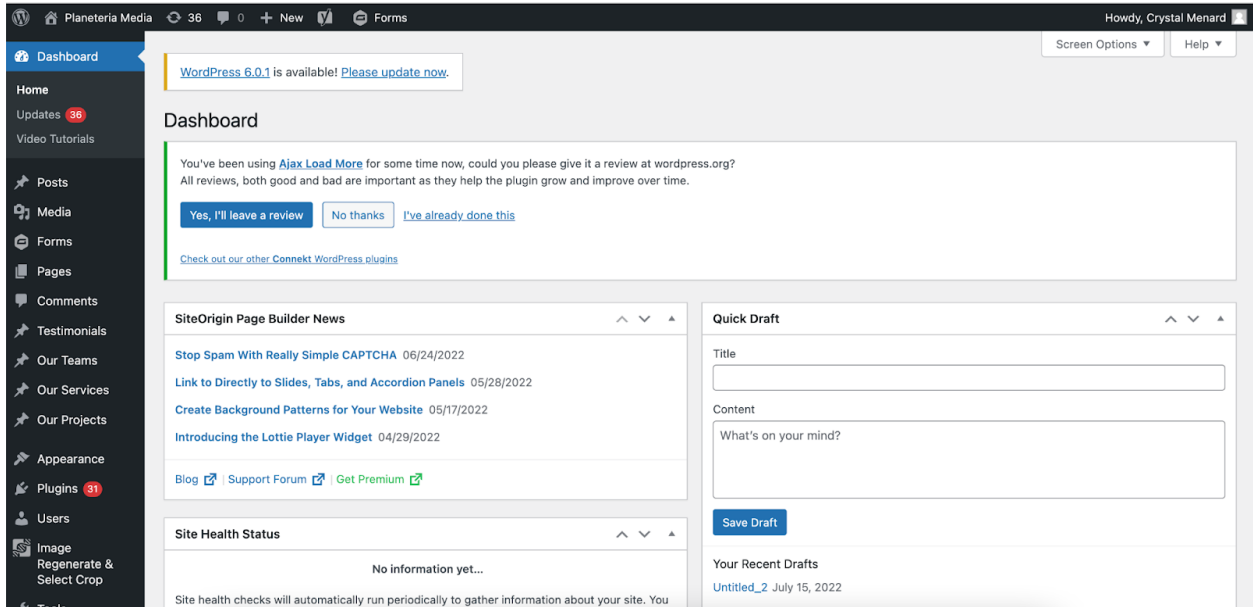
The frontend is your live site. It is what you and your users see.



### Backend

The backend is called the Dashboard in WordPress. It is where you make edits to your site. Familiarize yourself with the options your organization has activated: not every category is used on every website. Please note, your backend may look different, however the functionality and layout should be very similar. If you have questions please reach out to Planeteria.





## How to Log In to the Backend

### Log into Test Site

Before your site goes live you will be given a test url. It will look something like "test-site-name.pantheonsite.io".

1. Go to your site's test url
2. Type "/wp-admin" at the end of the url and hit Enter (PC) or return (Mac)
3. Type in your username and password
4. Click on Log in

### Log into Live Site

Once your site goes live you will be given the site's official url. You will log in using the same credentials as you used in the test site. You will get an error message if you try logging into the test url.

1. Go to your official site's url.
2. Type "/wp-admin" at the end and hit Enter (PC) or Return (Mac)
3. Type in your username and password
4. Click on Log in

### Forgot Credentials

If you forgot your username and password, you can reset them by following the steps below.

1. Go to your test URL (if your site is not live yet) or your live site URL (if your site is live) and type"/wp-admin" at the end, then hit Enter (PC) or Return (Mac)
2. Click on "Lost your password?" located underneath the login box
3. Enter the username or email address
4. Click on Get New Password

You will receive an email to reset your password. If you did not receive one, check your spam folder or other folders in your email address, as it may have gone to a folder other than your inbox.

## Users

Users are added to the Backend and can edit the website. Depending on their role, users can modify the site in various ways. There are several user roles.

- Administrator
- Editor
- Contributor
- Subscriber

The Administrator and Editor roles are the most common. The Administrator can make any edits on the site, whereas the Editor has less capability. For more information on user roles please visit [WordPress' Roles and Capabilities article](#).

**Note:** Only an Administrator can add new users and change a user's role.

You can also create other user types that are more restrictive in what a user can and cannot do. For example, if only one person makes news posts, a user can be assigned to only the News tab in the Dashboard. If you would like more information, please get in touch with Planeteria's Support team: [support@planeteria.com](mailto:support@planeteria.com).

## Edit User Role

**Note:** only Admin users can change a user's role.

1. Go to Users in the Dashboard
2. Click on the user's name
3. Scroll until you see Role with a dropdown menu beside it
4. Click on the dropdown field to change to the new role
5. Scroll to the bottom and click on Update User

## Add New User

**Note:** Only Admin users can create new user profiles.

1. Click on the Users tab in the Dashboard
2. Click on Add New
3. Enter the user's username (typically the email address) and email address
4. Change their Role as necessary
5. Click on Add New User

The user will be sent an email asking them to change their password. They will then be able to log into the backend. If they did not receive an email, the confirmation email might have gone to their spam folder.

Always check your spam folder before requesting another email. If you are still having difficulty with receiving emails from WordPress please reach out to Planeteria at [support@planeteria.com](mailto:support@planeteria.com).

## Template Vs. Page Builder Pages

There are two types of pages - Template pages and Page Builder Pages.

### Template Pages

Template Pages are pre-built pages with embedded content in them, meaning you fill in fields or make selections from a menu to create a page. If you make a page with a

template but don't add anything to the content editor, you will still see something on the frontend. Your homepage is an example of a template page.

## Page Builder Pages

Page Builder Pages are essentially blank canvases. When you create a page with no template page, you will have an empty white field on the frontend until you start adding content blocks to the content editor.

## Custom Post Types

Custom Post Types are tabs in your Dashboard such as People, Jobs, Meetings, Events, etc. They are called Post Types because they look like posts but are customized to have specific information or content and posted on your site differently than a regular post or page. They help categorize and manage content more easily on your Content Management System (CMS).

## Disclaimer

Please note, your dashboard, pages, editors, etc. may look different than what is shown in this documentation. Some information may also be irrelevant for your website. If you have questions, comments, updates, or feedback about any of the documentation below, please email [support@planeteria.com](mailto:support@planeteria.com).

# The Dashboard

## News

The News tab is where you can add, remove, or edit News posts.

## Create News

1. In the Dashboard click on News
2. Click on Add News
3. Enter in a Title. At this point you can publish or save a draft of the page
4. Add content. Click on Update as you go to save your work.

## Publishing

You can backdate to show an older date than the current date or forward-date a post (the Post will not show on your site until that day).

1. Go to the Advanced Settings pane on the right and make sure you are on Post (not Block)
2. Next, to publish, click on the date and change it accordingly
3. Update

## Categories

Categories are helpful so users of your site can filter the posts appropriately.

### Creating Categories

1. In the Dashboard, click on News
2. Click on Categories
3. Add a new category by adding in a Name and then clicking on Add New Category

You can edit already created categories by clicking on Edit underneath the title.

### Assigning a Category

You can assign the post to a category. This will help the users of your site filter posts by categories.

1. On the Advanced Settings pane on the right, under the News tab, scroll down until you see Categories.
2. Check the appropriate category
3. Update

## Featured Images

You can set a featured image for each post. When you assign a featured image, it will show up anywhere posts are syndicated on your site.

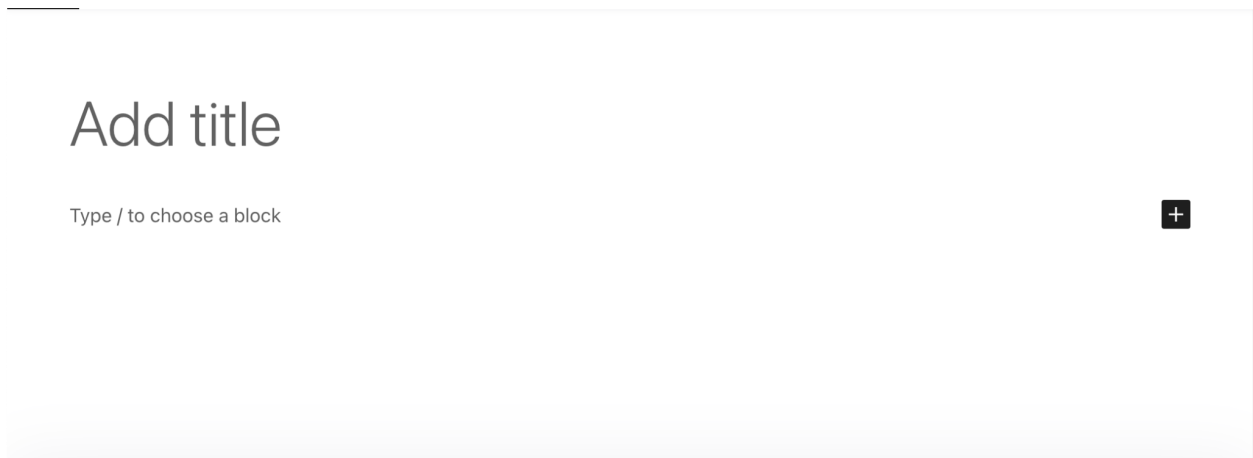
## Pages

Pages are what make up the bulk of your site. Pages are meant to have static content, meaning the content on a page does not change over time. There are different components to the Page editor.

### Main Toolbar



### Page Builder



### Syndication

These fields have more settings. The Services/Programs section allows you to tag the page as a service to an administering department. When a page is tagged as a service it will display in the Service Directory page (if you opted into this functionality) and it will display in the department page it is tagged to. The Quick/Page/Post Redirect section allows you to redirect the page to an external website. The Yoast SEO (Search Engine Optimization) section appears if the Yoast plugin has been added to your website. It helps to determine how well the page is doing in terms of search engine optimization.

Services / Programs	^ v ▾
Quick Page/Post Redirect	^ v ▾
Yoast SEO	^ v ▾
General Syndication	^ v ▾
Right Sidebar Content	^ v ▾

## Advanced Settings

Page	Block
<ul style="list-style-type: none"> <li>▾ <b>Summary</b></li> <li>▾ <b>Yoast SEO</b></li> <li>▾ <b>Service Types</b></li> <li>▾ <b>Featured image</b></li> <li>▾ <b>Page Attributes</b></li> </ul>	

## Meetings/Events

### When

Add the date and time of the meeting or event. If this is an event you can add multiple dates using the Add Occurrence button. If the meeting or event gets canceled you don't have to delete the meeting or event, you can click on the radio button underneath the section "Was This Calendar Canceled?"

Meetings & Events ^ v ▲

When Where What Contact Materials

Dates & Times \*

Indicates the start and end date / time (s) for this calendar item. You can enter up to 8 different event occurrences. Please note that if this is a calendar item that has unique materials at each occurrence (like a meeting) you'll want to enter them as separate calendar items rather than as separate occurrences of the same calendar item.

	Start Date & Time Start date and time for this instance. If you don't have a time to enter then leave it at 12 AM.	End Date & Time End date and time for this instance. If you don't have a time to enter then leave it at 12 AM.
1	September 26, 2023 9:45 am	

[Add Occurrence](#)

Was This Calendar Item Cancelled?  
Checking this will put a cancelled flag on the meeting listing.

## Where

If the meeting or event is in-person choose or add the location name and address.

When **Where** What Contact Materials

Location Name  
Select a location from these common options, or click other and write a custom location name.

1  
 Online Only

Location Address  
Location of the event.

If the meeting or event is virtual add the virtual meeting link or live stream link.

Virtual Meeting Link  
If applicable provide the link to the virtual event.

Live Stream Link  
If this meeting has a livestream link you can place it here.

## What

Add a summary description of the meeting. This content appears in the main meeting/event calendar page underneath the meeting or event's featured image. If you have opted to have a meeting or event's detail page then content will go in the Page Builder section.



When Where **What** Contact Materials

Summary Description  
Event or meeting summary provided in the listing. If the event needs its own page then use the page builder above.

[Add Media](#) Visual Text

Paragraph B I [List] [List] [Quote] [List] [List] [List] [Link] [List] [List] [Table]

## Contact

If there is a specific person to contact for the meeting or event click on the radio button underneath "Is there a designated person to contact about this calendar item?" You can manually enter the person's information or choose from the People database by clicking on the radio button underneath "Is this person in the website database under 'People'?"

When Where What **Contact** Materials

Is there a designated person to contact about this calendar item?  
If there's a contact person designated for this meeting or event, please check this box.

Is this person in the website database under "People"?  
If the person to contact about this calendar item is already in the "People" content directory on this site, please check this box. Otherwise you can leave it unchecked and manually enter the contact person's information below. Please note that you cannot add people to the "People" directory from this screen. **Add to "People" directory first.** (this is only recommended if you will need to link this person to other site content in the future).

Contact Name

Contact Info

Visual Text

Paragraph B I [List] [List] [Quote] [List] [List] [List] [Link] [List] [List] [Table]

# Materials

This section is for meetings only. Add any document relevant to this meeting.

Meetings & Events

When Where What Contact **Materials**

Meetings Template Only

The Materials section is only meant for calendar items using the meetings template. Calendar items using the events template should defer to the page builder options above.

Agenda

Minutes & Recordings

Other Documents

## Resources/Resource Library

This tab creates a Document Library on your site and filters PDFs by categories you create.

### Resource Type

Add new resource types

Alerts

FAQs

Forms & Submissions

Media

Meetings

People

**Resources**

Basic Site Admin

Admin Columns

Clear Cache

Help & Support

**Library Select**

Select the libraries/indexes in which to show this file. Please note that library pages are programmed. If a new file library/index page needs to be added to the site, please contact **Planeteria**

Bills & Resolutions

Key Documents

Maps

All Resources

Add New

Resource Types

Release Date

If applicable, indicate the date that this resource was published or released.

### Add a new resource

Screen Options

Help

### Resources

Create resource library items for media library items, collections and links that should be indexed in the library and featured on relevant department and division, service and program and other pages.

**Add New**

### Add a title

### Add new Resource

Add title

## Select the resource type

### Document Type

Please select a doc type. This will be used for filtering options in document libraries.

- Weekly Commission
- Monthly Commission
- Activity Zoning, Urban Design and Subdivision
- Administrative
- Annual Reports and Plans
- Archive
- Awards and Grants

## Add the content

Content can be PDFs or URLs to external sites

## Resource Library



Metadata

Downloadable Content

External Content

### Files For Download

Select one or more downloadable files such as PDF or XLSX to put in this listing. Put multiple files in the order you'd like them to appear. Examples of why you may have multiple files are: instructions and form, report and appendices, document translations or multiple versions.

Add File For Download

## Publish

Screen Options

### Add new Resource

Add title

## Resource Library



Metadata

Downloadable Content

External Content

### Files For Download

Select one or more downloadable files such as PDF or XLSX to put in this listing. Put multiple files in the order you'd like them to appear. Examples of why you may have multiple files are: instructions and form, report and appendices, document translations or multiple versions.

Add File For Download

## Publish



Save Draft

Preview

Status: Draft Edit

Visibility: Public Edit

Publish immediately Edit

SEO: Not available

Readability: Not available

Copy to a new draft

Publish

# Blocks

Blocks are used to add different types of content. Your CMS comes with WordPress blocks as well as blocks created by Planeteria’s development team suited specifically for your website.

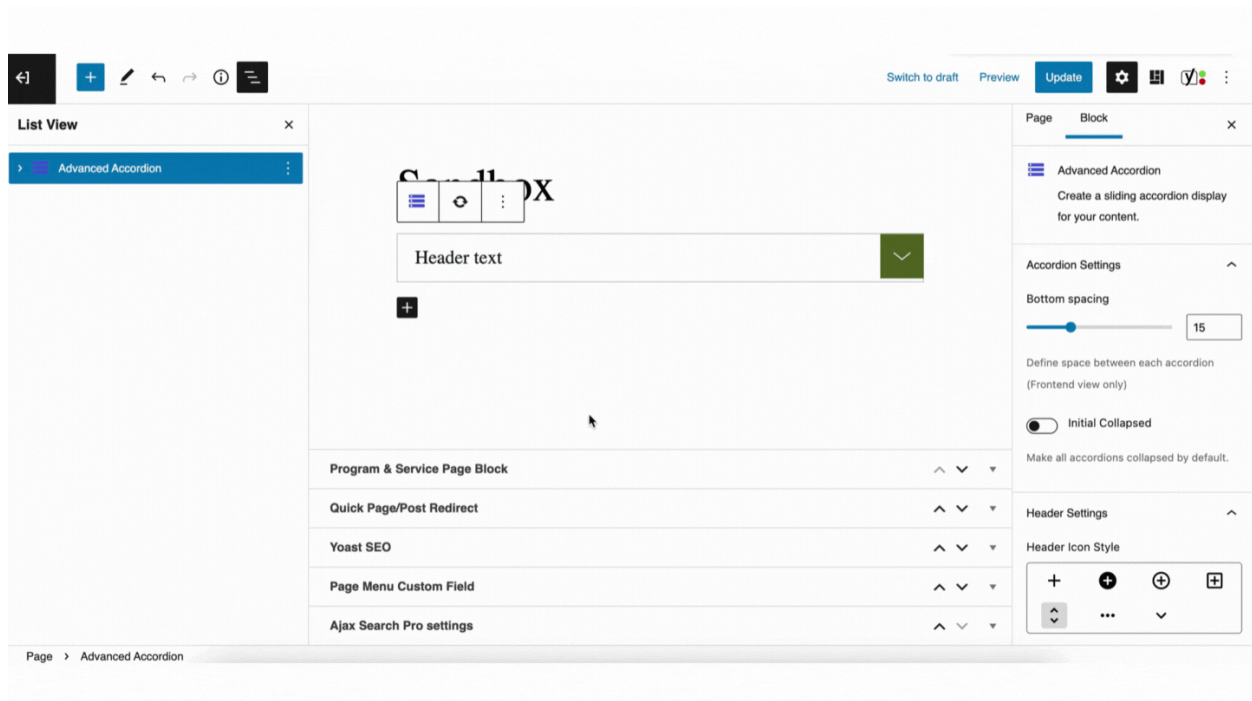
## Accordion

The Accordion block allows you to add content into different collapsible sections.

The accordion toolbar consists of few options





The first icon allows you to add an accordion block to a column or group block.





TRANSFORM TO

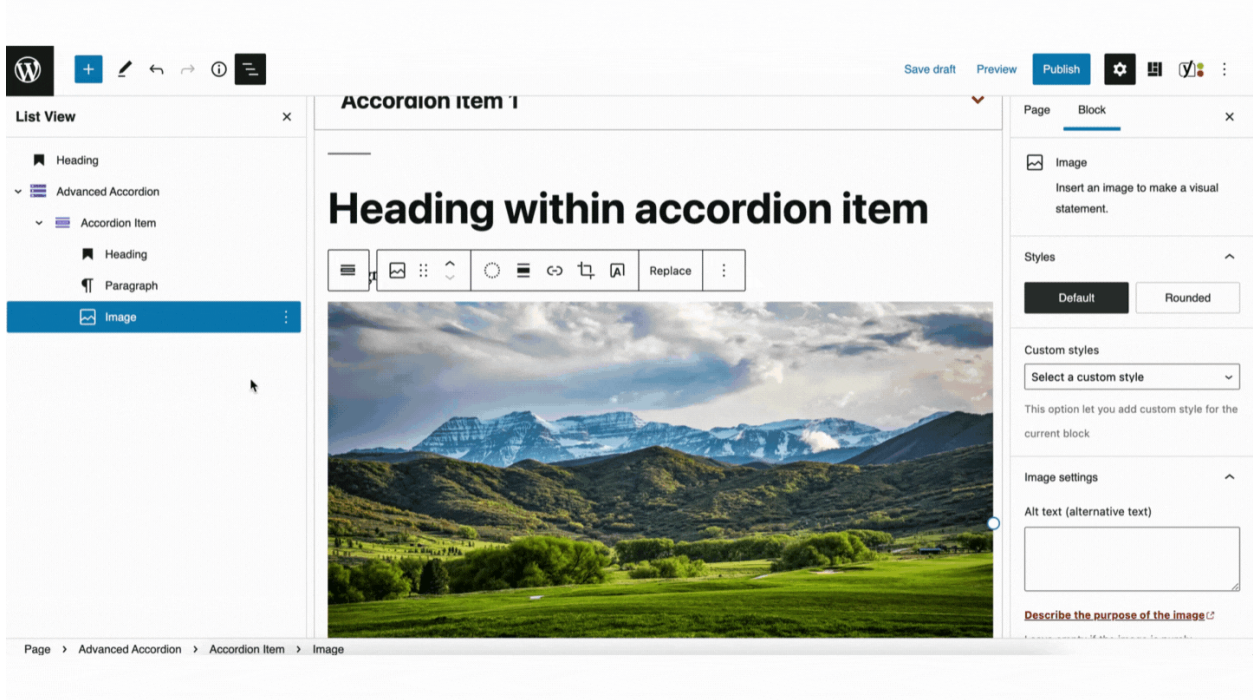
 Columns

 Group

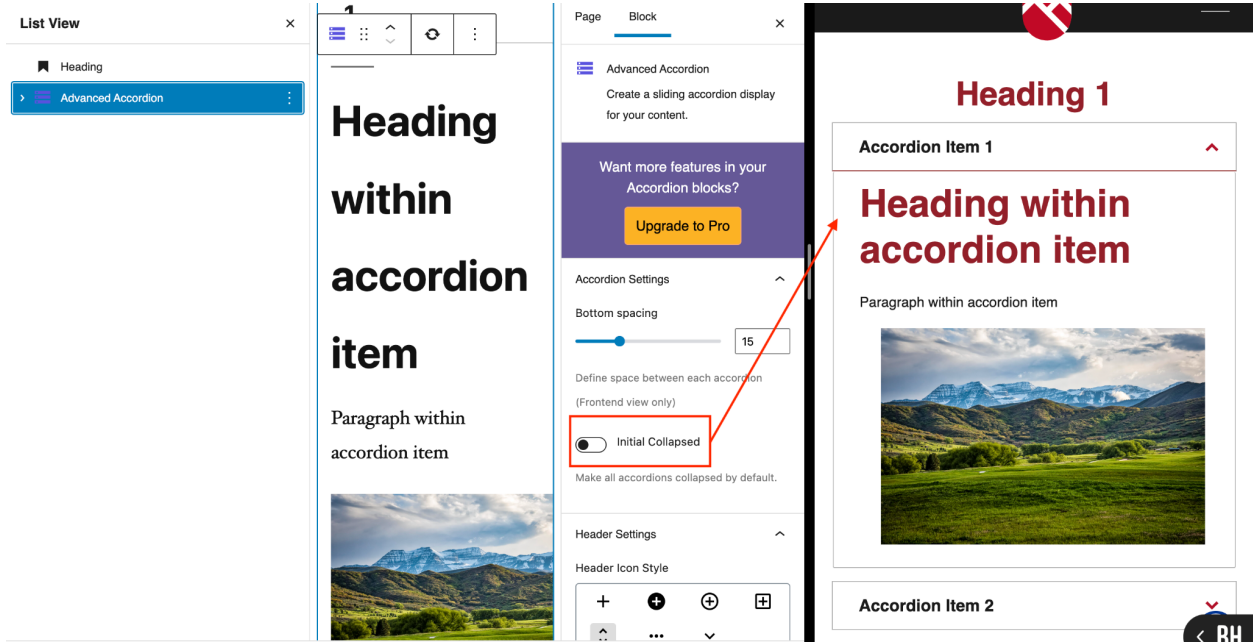
You can add blocks into an accordion item.

The screenshot shows the WordPress Gutenberg editor interface. The main content area displays a heading "Sandbox" followed by "Heading 1". Below the heading is an "Accordion Item 1" block. The accordion item is currently empty, with a text prompt "Type / to choose a block" and a plus sign icon. The left sidebar shows the "List View" of the page, with "Advanced Accordion" expanded to show "Accordion Item". The right sidebar shows the "Page" settings for the "Block", including "Accordion Settings" with options for "Bottom spacing" (set to 15), "Initial Collapsed" (checked), and "Header Tag".

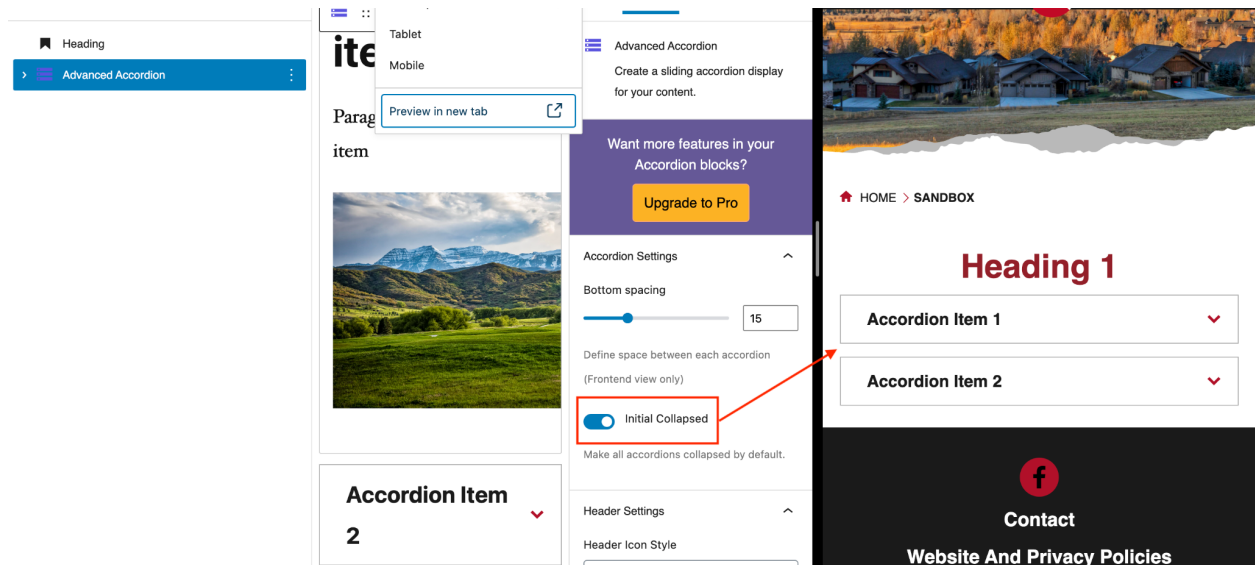
You can add multiple accordion items. Make sure you keep related content together by Duplicating the first Accordion Item you are given. Then, the whole set can be moved by adjusting the first one.



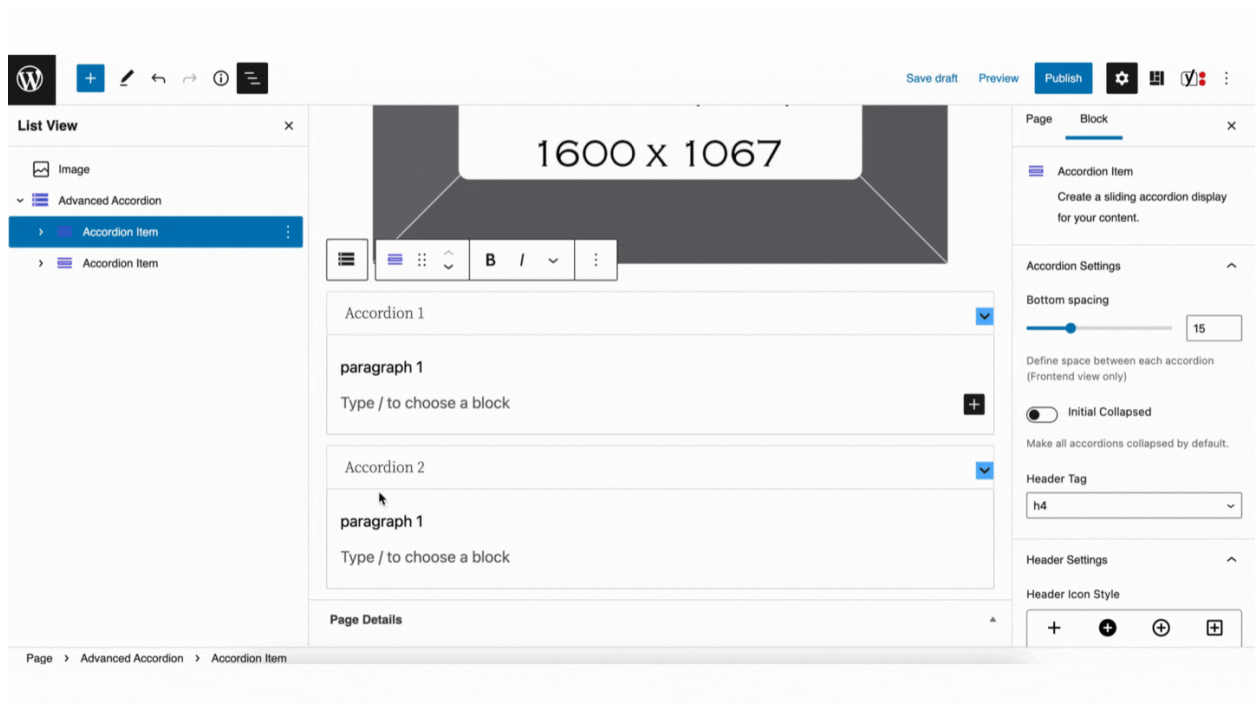
At default, the first accordion item is expanded. You can collapse the first item.  
**Accordion item not collapsed.**



## Accordion item collapsed.



You can rearrange accordion items by dragging and dropping them.



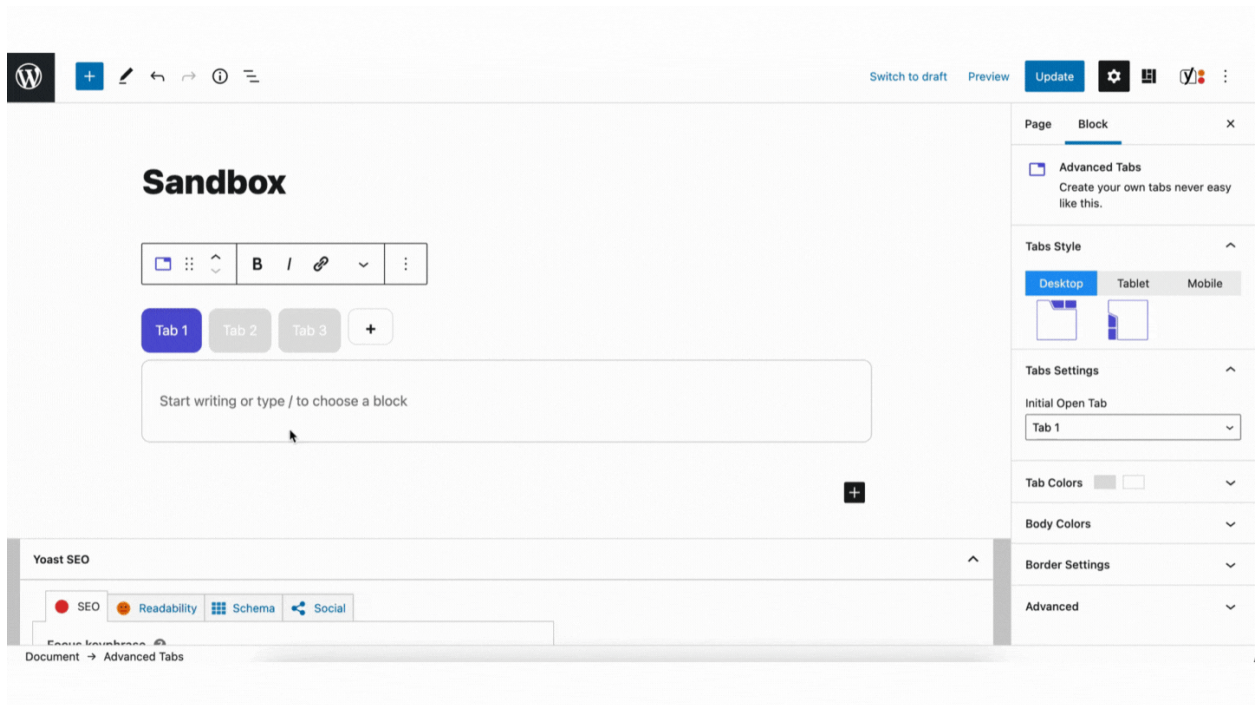
## Advanced Tabs

### Add Block

1. Click on the white plus button
2. Search for Advanced Tabs

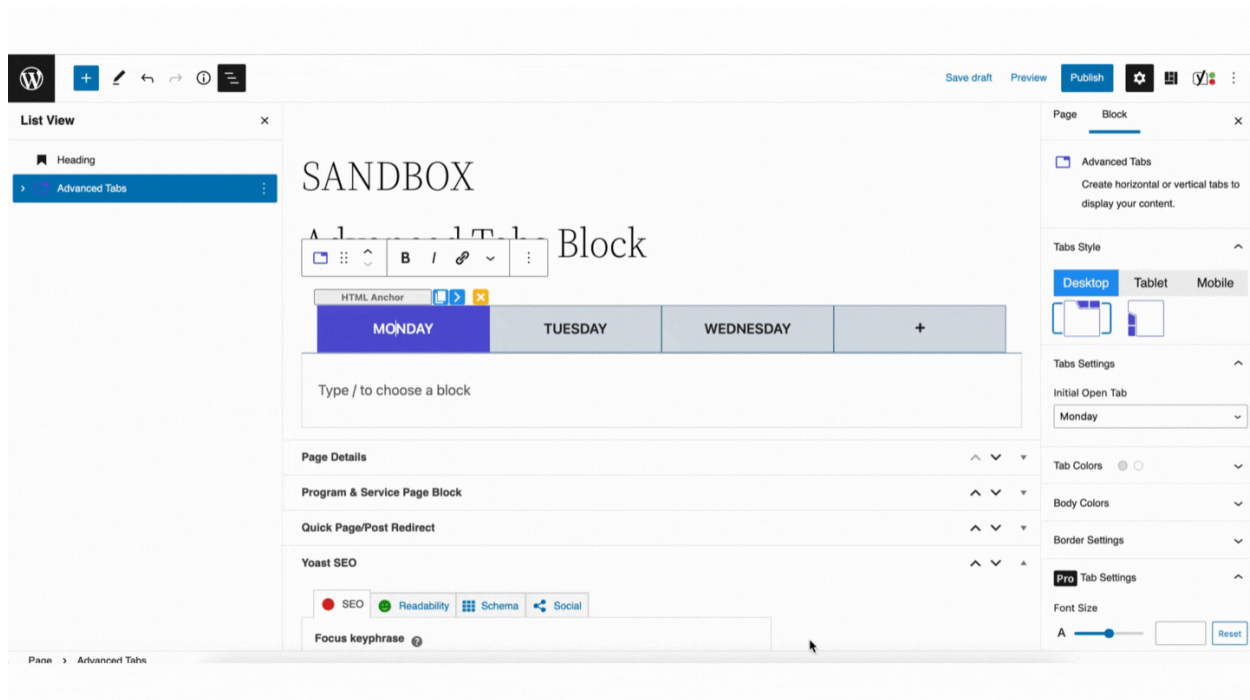
[Back to top](#)

3. Click on the Advanced Tabs icon
4. Highlight the titles in the tabs to change the title



## Add Content

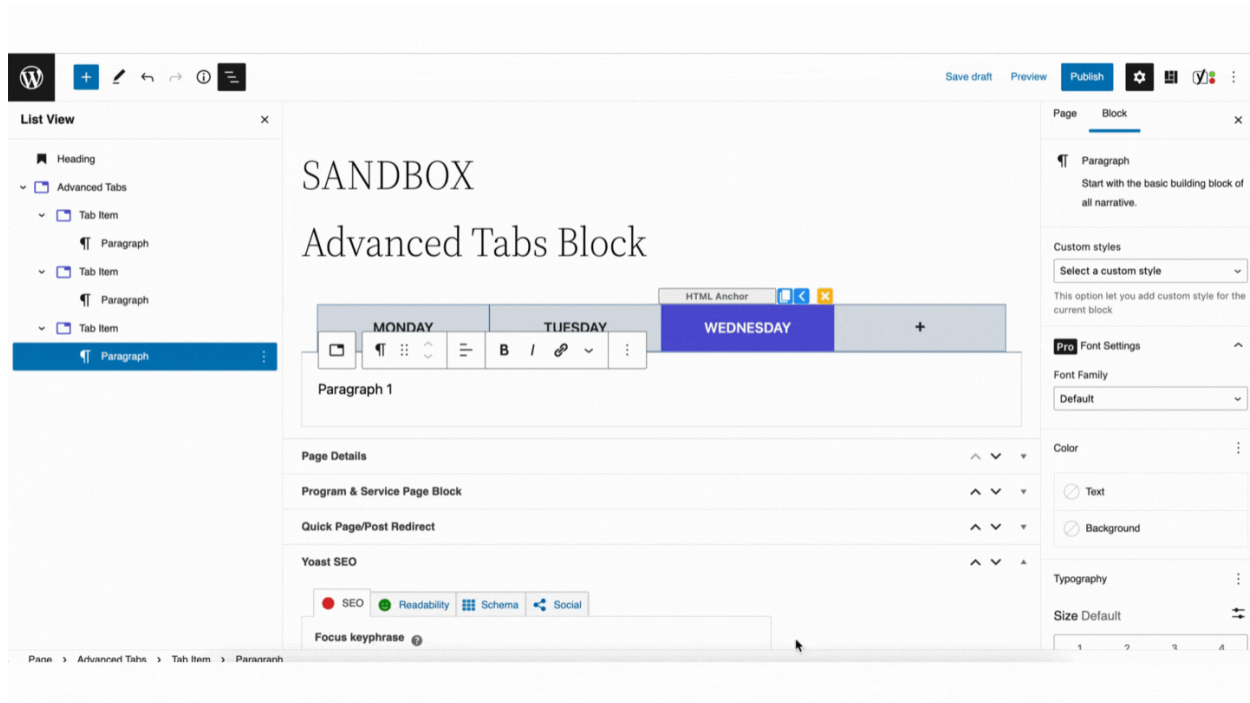
You can add blocks inside each tab.





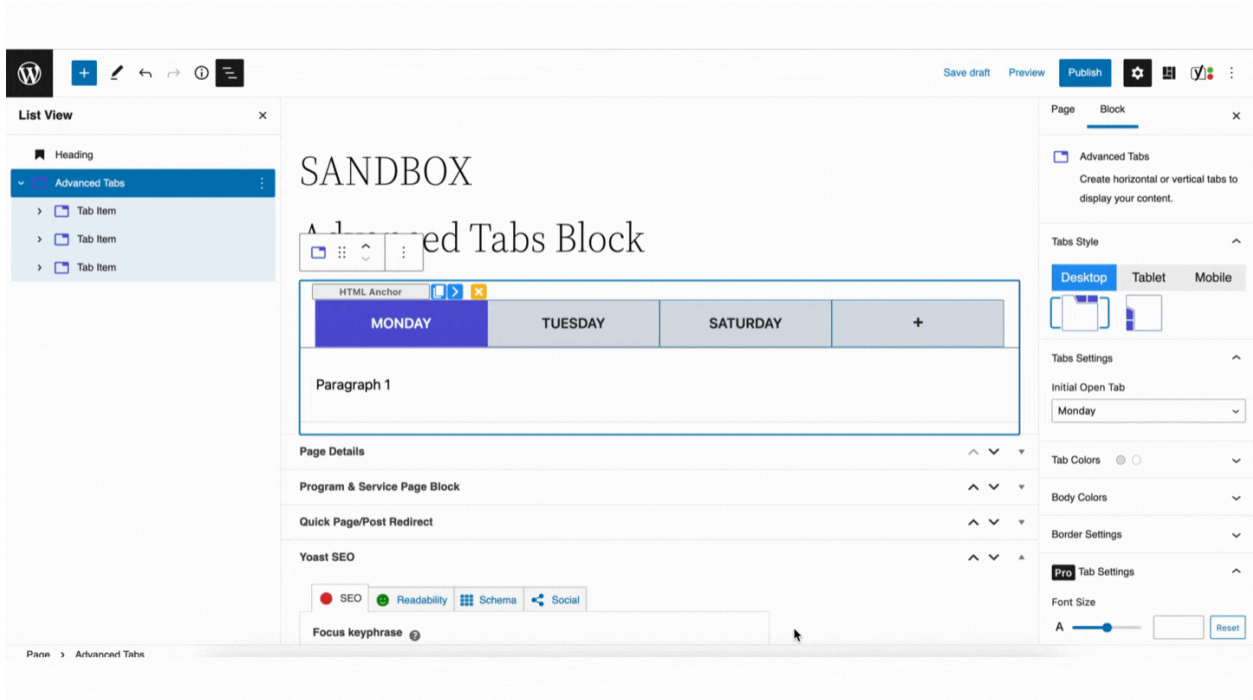
## Add and Remove Tabs

You can add more tabs or remove current tabs. Too many tabs can cause problems with mobile users, so be aware of how many you use.



## Rearrange Tabs

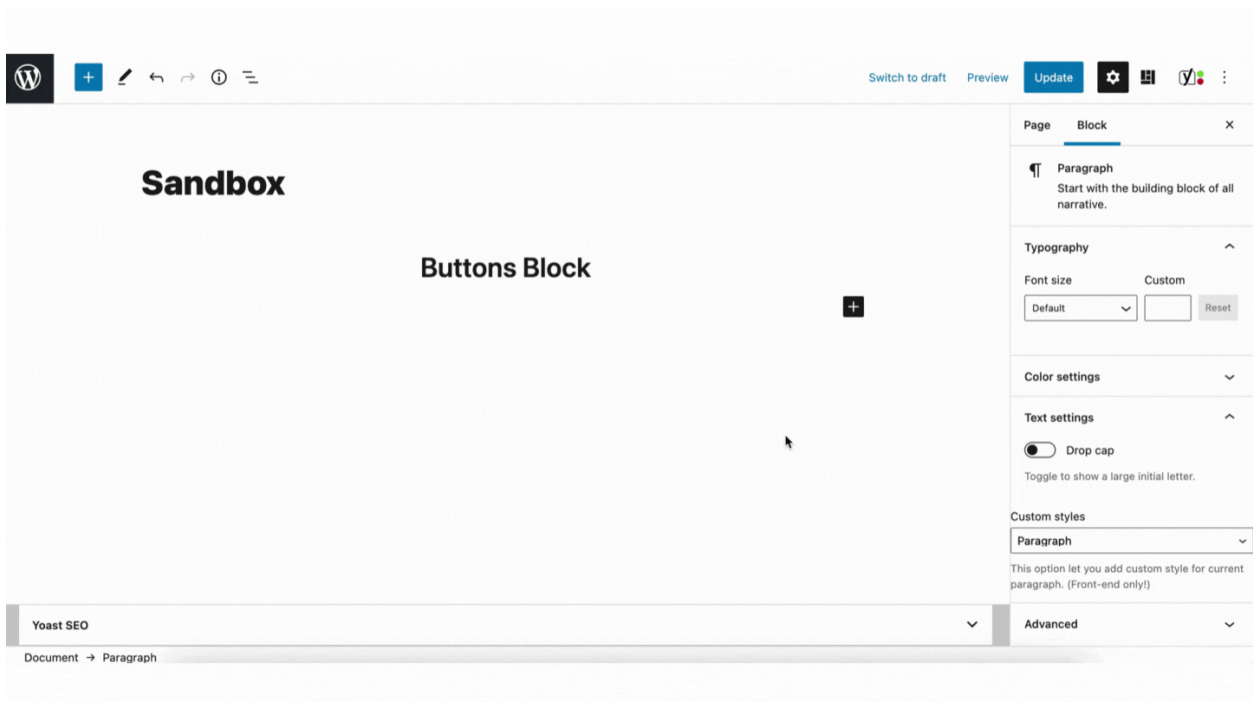
You can rearrange the tabs as you see fit by dragging them back and forth.



## Buttons

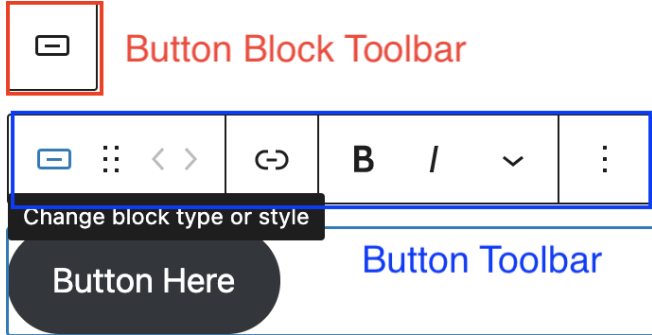
Buttons are links to other pages on your site or external websites.

## Add Button Block



# Button Block Toolbars

The Button Block has two toolbars, one for the block and one for the button itself. Moving, deleting, and duplication is done on the top one, and destinations and other details are on the bottom.



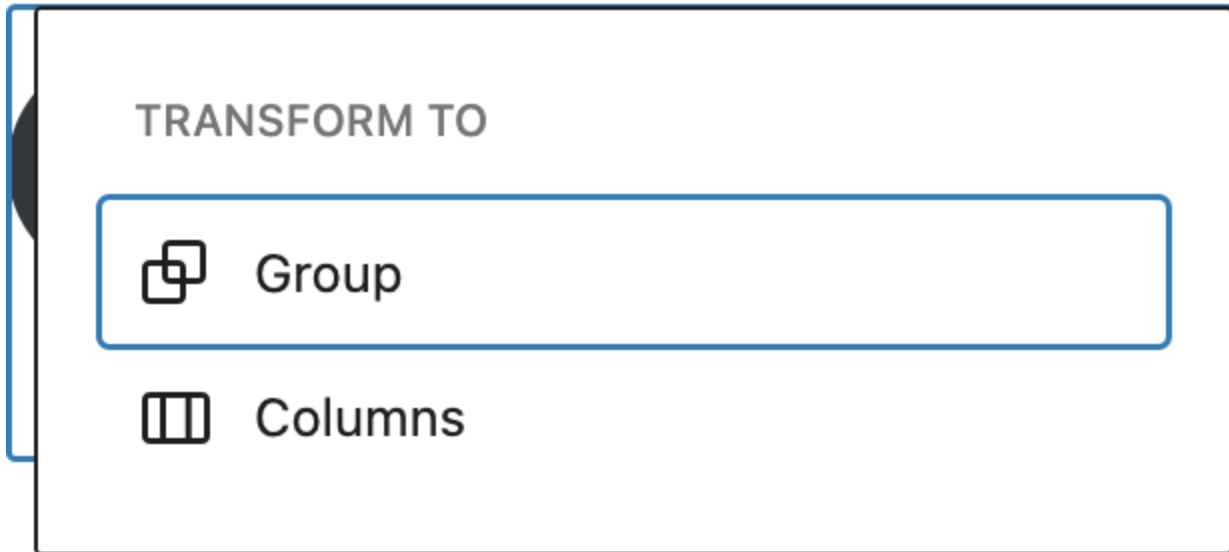
Hover over the Button Toolbar to view and click on the Button Block Toolbar.

## Block Toolbar



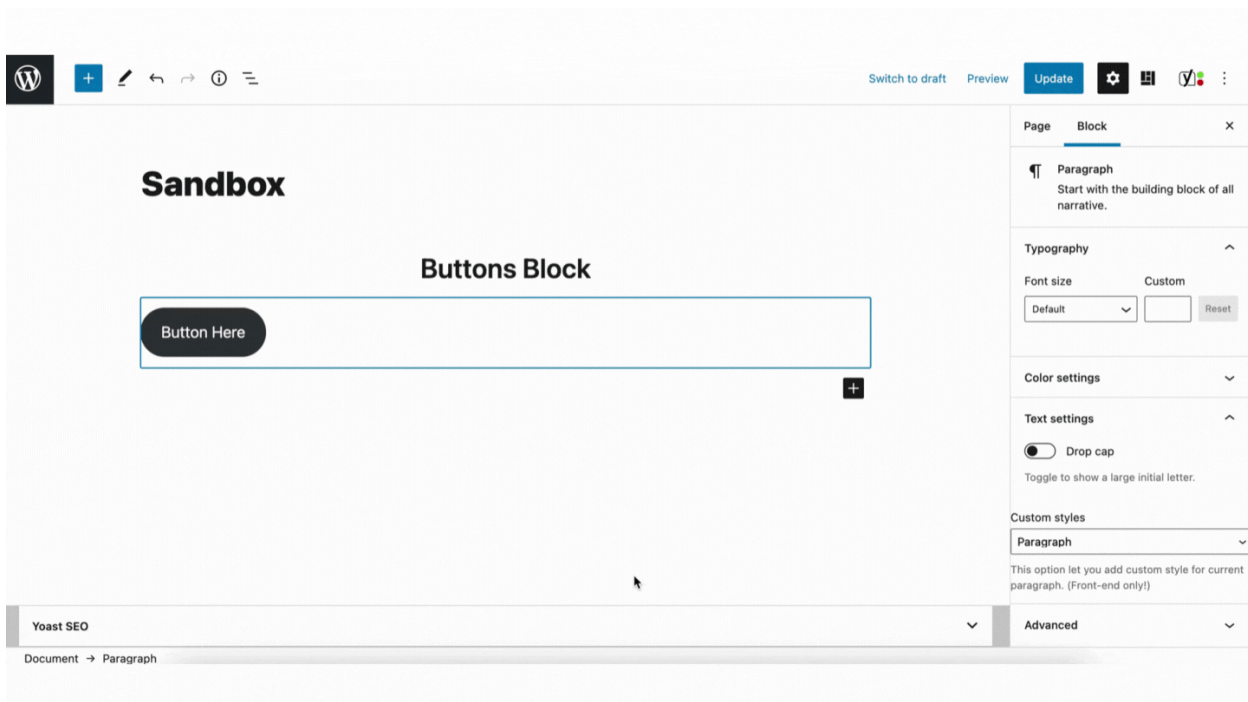
## Transform Tool

The first icon is the Transform tool. It allows you to insert the Buttons block to a group or a column.



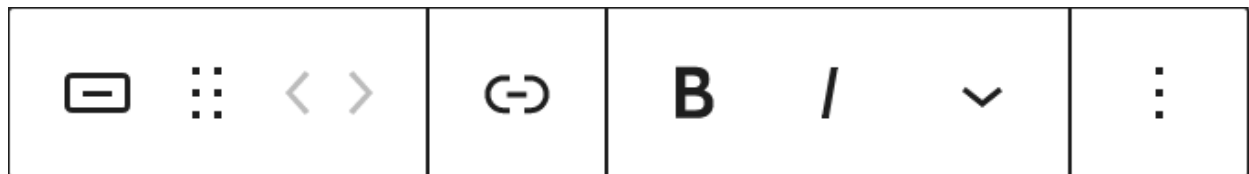
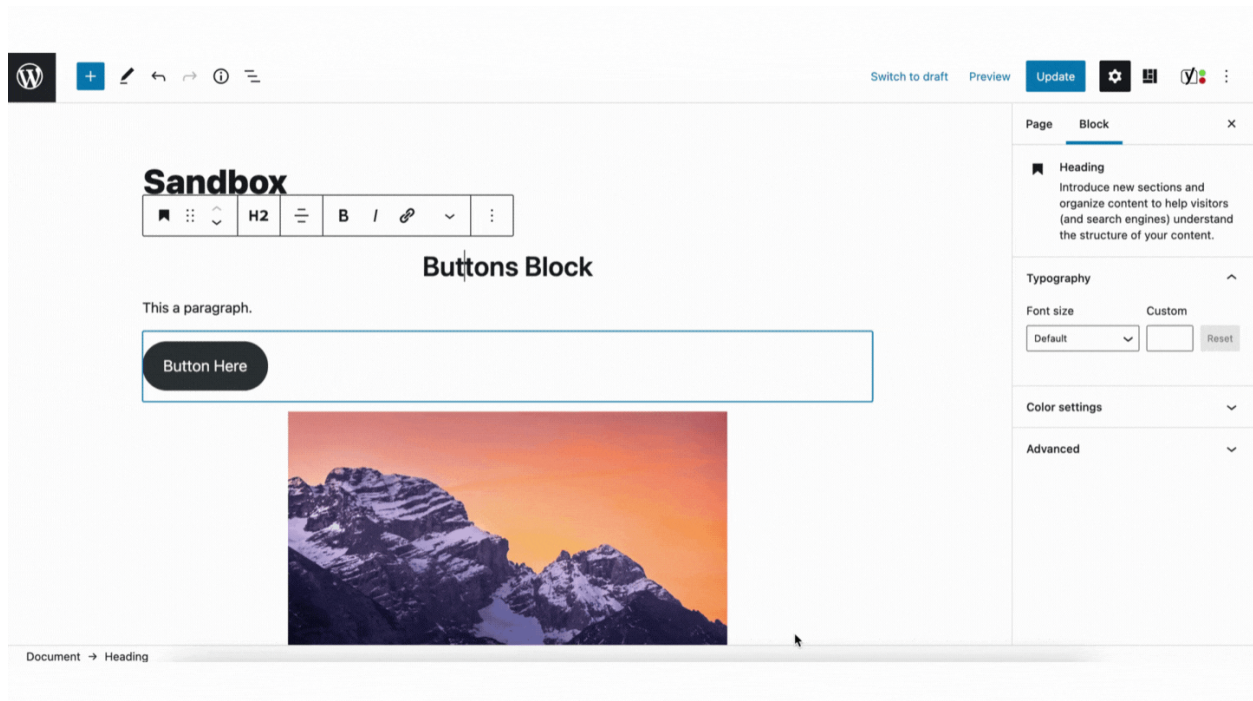
## Drag Tool

The next icon is the Drag tool. It allows you to drag the block to another location.



## Move Up/Down Tool

The Move Up/Down Tool is similar to the Drag Tool. It allows you to move the block to another location.



## Transform Tool

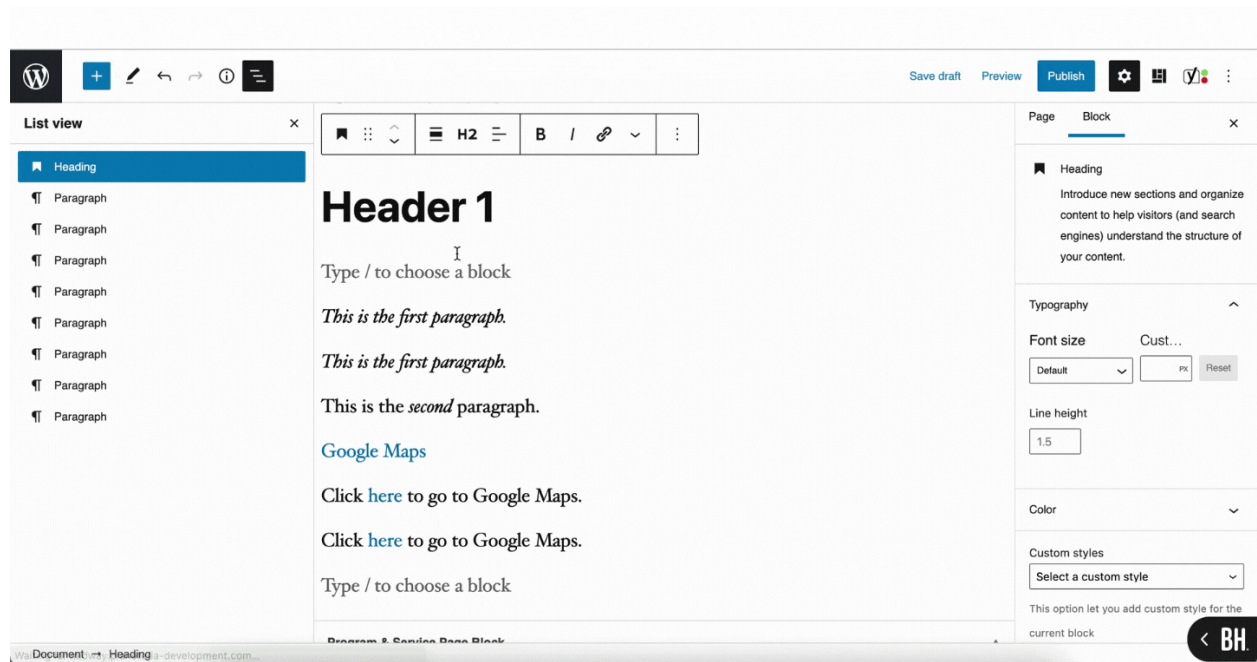
You can transform the Button Block to similar blocks.

## Header

The header block allows you to write a line of text. You can format headers in different ways. When you click inside the header block you will see the block toolbar pop up right above the block. Headers also have a lot to do with how search engines and accessibility software interacts with a page, so use them with that in mind.

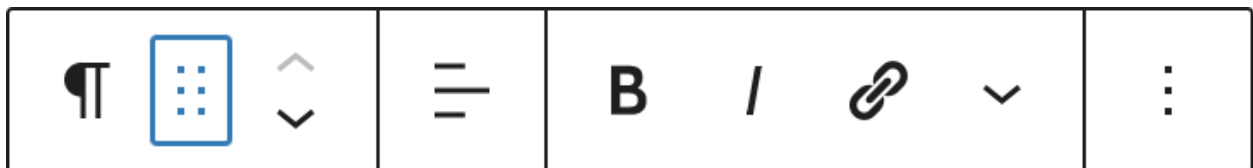
## Transform Tool

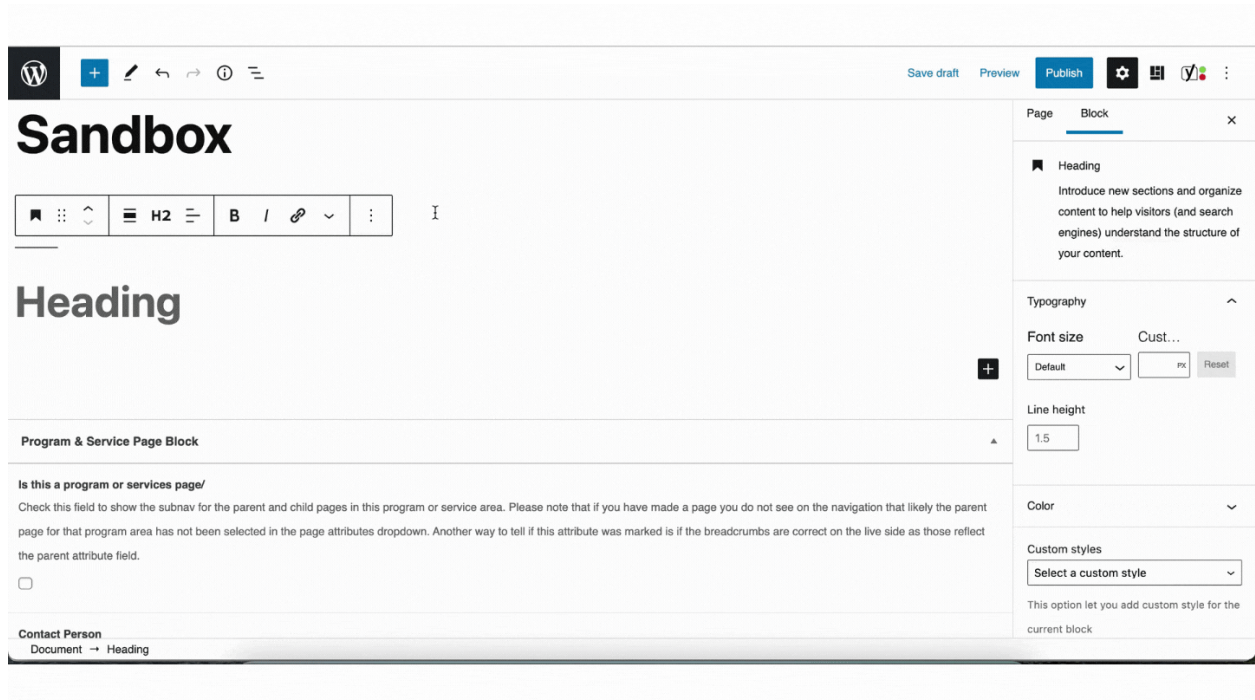
The first icon is the Transform tool. When you click on it you will have several options to change the header block to other blocks similar to the header block.



## Drag Tool

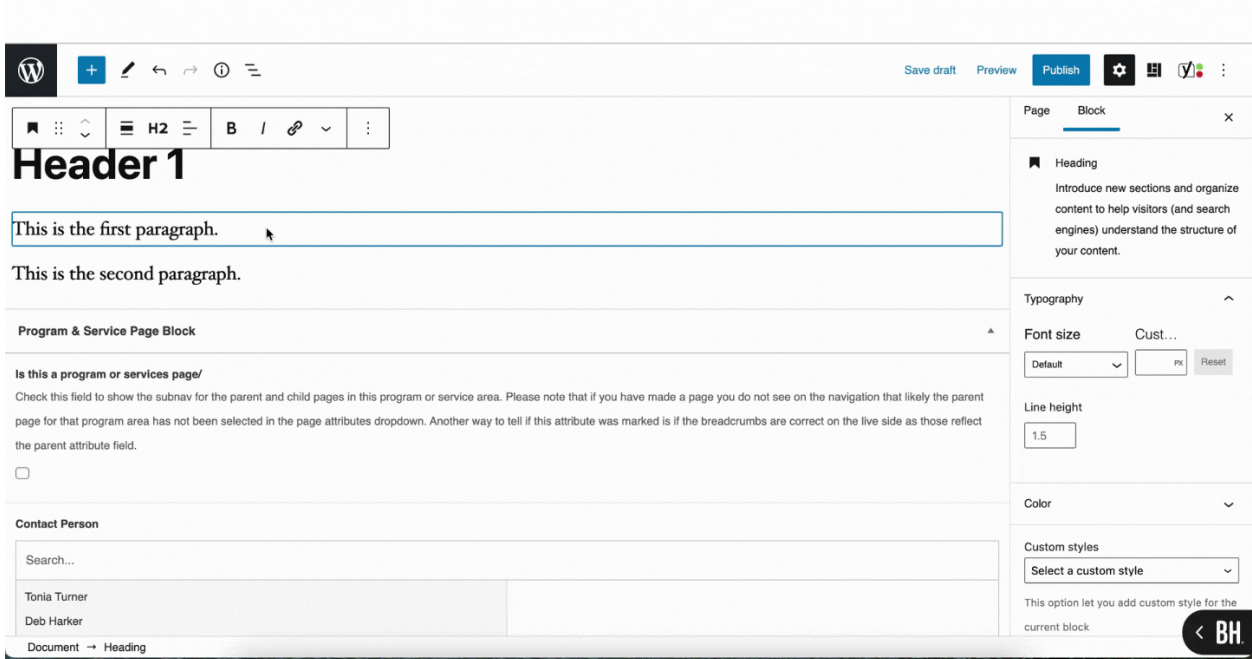
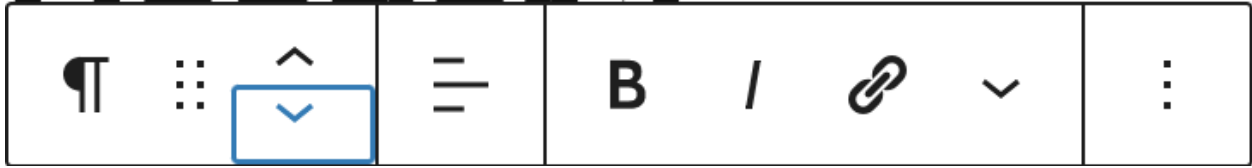
The next icon is the Drag tool. It allows you to move the block to other locations of the content editor. Multiple selections can be moved at once.





## Up/Down Arrow Tool

The next icon is the move down or up arrow. This is similar to the Drag tool. When you click on the up arrow or the down arrow, it moves the block above a block or below a block, respectively. Similar to the drag tool, this does the same thing one step at a time.



## Change Heading Level Tool

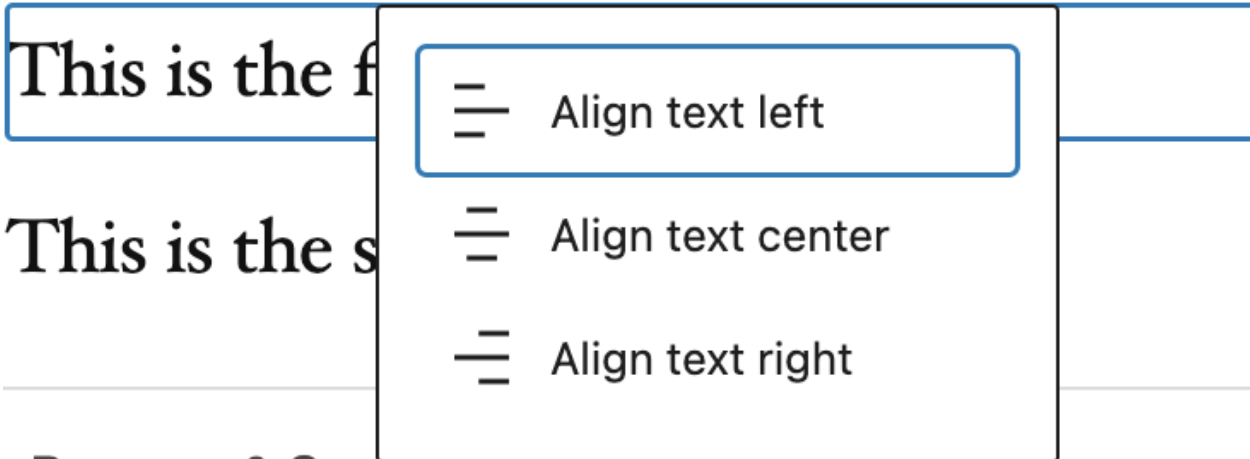
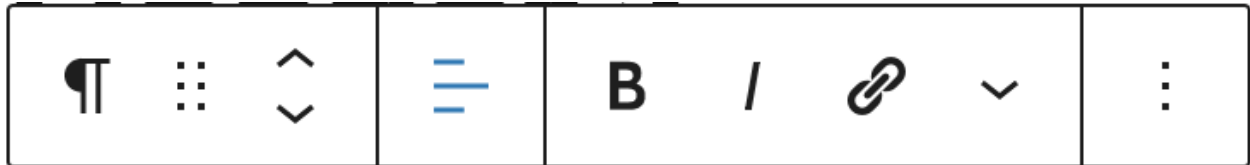
The next icon is the Change Heading Level Tool. You have options for headers 1-6. Used not only to create eye-catching headlines, the H1-6 also establishes hierarchy for page readers and search engine.





## Change Text Alignment Tool

The next icon is the Change Text Alignment tool. You can left align, center align, or right align text.



## Bold Tool

The next icon is the Bold tool. You can bold a whole block or individual words.

WordPress Gutenberg editor interface. The top toolbar shows the Bold (B) icon highlighted. The main content area contains:

- Header 1
- Paragraph: This is the first paragraph.
- Paragraph: This is the second paragraph.

The right sidebar shows the 'Block' settings panel:

- Page: Block
- Heading: Introduce new sections and organize content to help visitors (and search engines) understand the structure of your content.
- Typography: Font size (Default), Line height (1.5), Color.
- Custom styles: Select a custom style.

## Italics Tool

The next icon is the Italics tool. You can italicize a whole block or individual words.

WordPress Gutenberg editor interface. The top toolbar shows the Italic (I) icon highlighted. The main content area contains:

- Header 1
- Paragraph: *This is the first paragraph.*
- Paragraph: This is the second paragraph.

The right sidebar shows the 'Block' settings panel:

- Page: Block
- Heading: Introduce new sections and organize content to help visitors (and search engines) understand the structure of your content.
- Typography: Font size (Default), Line height (1.5), Color.
- Custom styles: Select a custom style.

## Link Tool

The next icon is the Link tool.



You can link a whole block or individual words. If you see a phone number, add tel: and the phone number into the link field to make a clickable call link.

The links can open up a new window or it can open on the same tab.

WordPress editor interface showing a page titled "Header 1". The main content area contains the text "This is the first paragraph." followed by a "Google Maps" link and a "Click here to go to Google Maps." link. The right sidebar shows the "Paragraph" block settings, including typography options like font size (Default) and line height (1.5), and text settings like "Drop cap". The bottom of the sidebar shows "Custom styles" with a "BH" button.

Header 1

*This is the first paragraph.*

Google Maps

Click [here](#) to go to Google Maps.

**Program & Service Page Block**

Is this a program or services page/  
Check this field to show the subnav for the parent and child pages in this program or service area. Please note that if you have made a page you do not see on the navigation that likely the parent page for that program area has not been selected in the page attributes dropdown. Another way to tell if this attribute was marked is if the breadcrumbs are correct on the live side as those reflect the parent attribute field.

**Contact Person**  
Document → Paragraph

Page Block

Paragraph  
Start with the building block of all narrative.

Typography

Font size: Default, Cust...  
Line height: 1.5

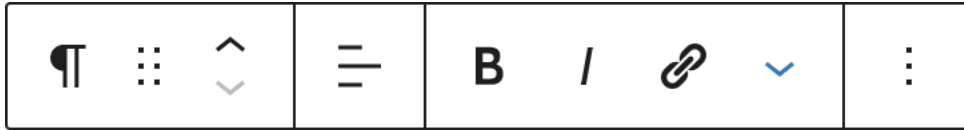
Color

Text settings

Drop cap  
Toggle to show a large initial letter.

Custom styles < BH

## More Tools



Click [here](#) to go to Google M

### Program & Service Page Block

#### Is this a program or services page/

Check this field to show the subnav for the page for that program area has not been selected in the parent attribute field.

< > Inline code

 Inline image

 Keyboard input

 Strikethrough

X<sub>2</sub> Subscript

X<sup>2</sup> Superscript

A Text color

You may see what these tools do and how they work, but they are rarely used so it might pay to ask before using them on a site going live.

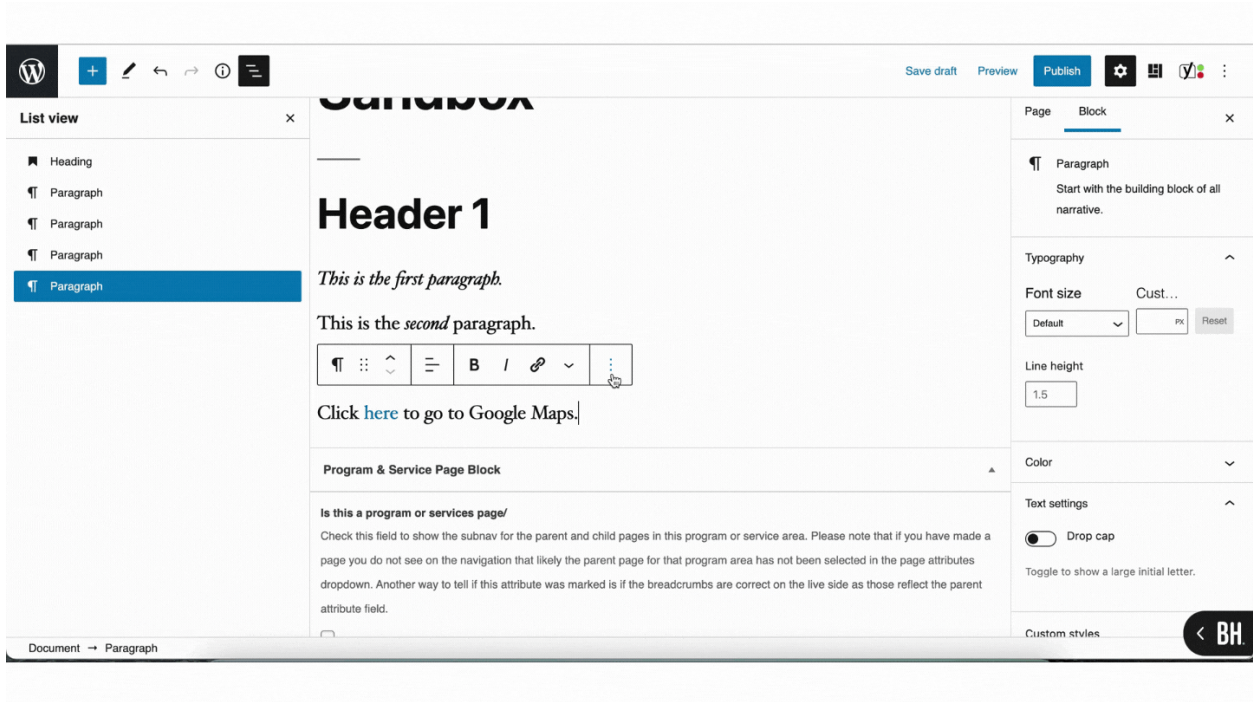
## Options Tool

This tool is in all blocks.

		/	
<p>Click <a href="#">here</a> to go to Google Maps.</p>			<div style="background-color: black; color: white; padding: 2px; font-weight: bold;">Options</div> <ul style="list-style-type: none"> <li>Hide more settings <span style="float: right;">⇧⌘,</span></li> <li style="border: 1px solid blue; padding: 2px;">Copy</li> <li>Duplicate <span style="float: right;">⇧⌘D</span></li> <li>Insert before <span style="float: right;">⇧⌘T</span></li> <li>Insert after <span style="float: right;">⇧⌘Y</span></li> <li>Move to</li> <li>Edit as HTML</li> </ul> <hr/> <ul style="list-style-type: none"> <li>Add to Reusable blocks <span style="float: right;">↺↻</span></li> <li>Group</li> </ul> <hr/> <ul style="list-style-type: none"> <li>Remove block <span style="float: right;">⇧⇧Z</span></li> </ul>
<p><b>Program &amp; Service Page Block</b></p>			
<p><b>Is this a program or services page/</b>          Check this field to show the subnav for the parent and page for that program area has not been selected in the parent attribute field.</p> <input type="checkbox"/>			
<p><b>Contact Person</b></p>			
<p>Search...</p>			
<p>Document → Paragraph</p>			

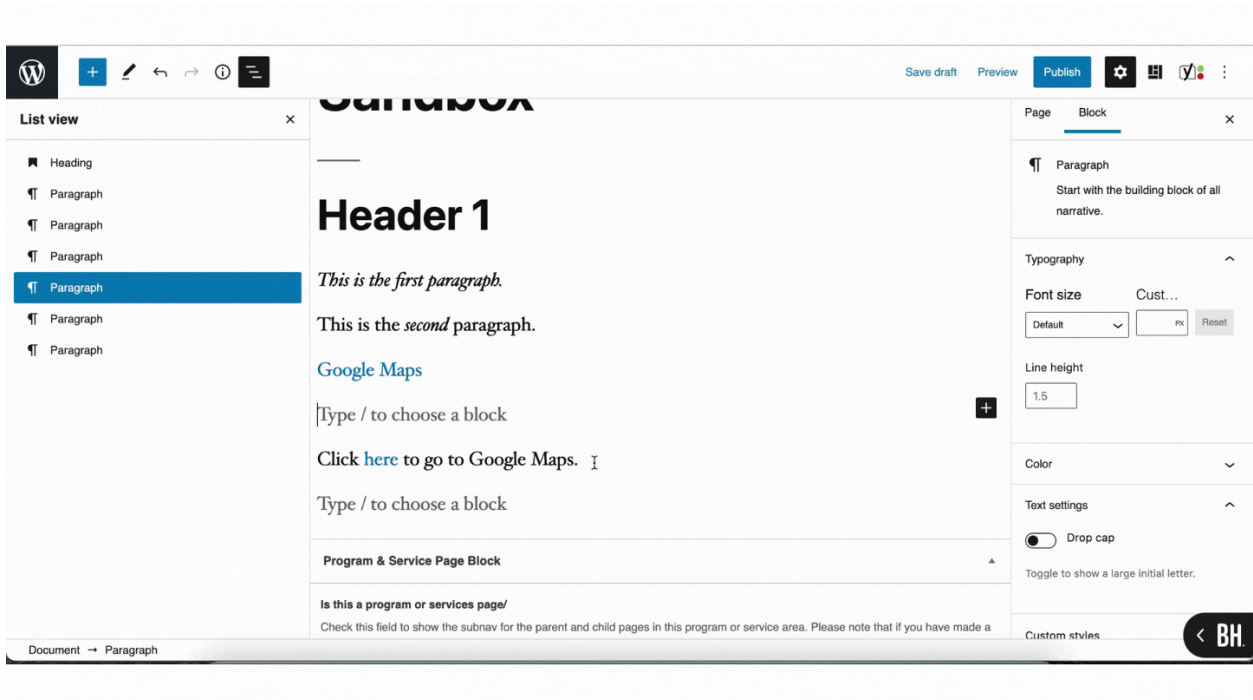
### Insert before/Insert after

Insert a block before or after an existing block. Very useful when inserting content when there's no space to click.



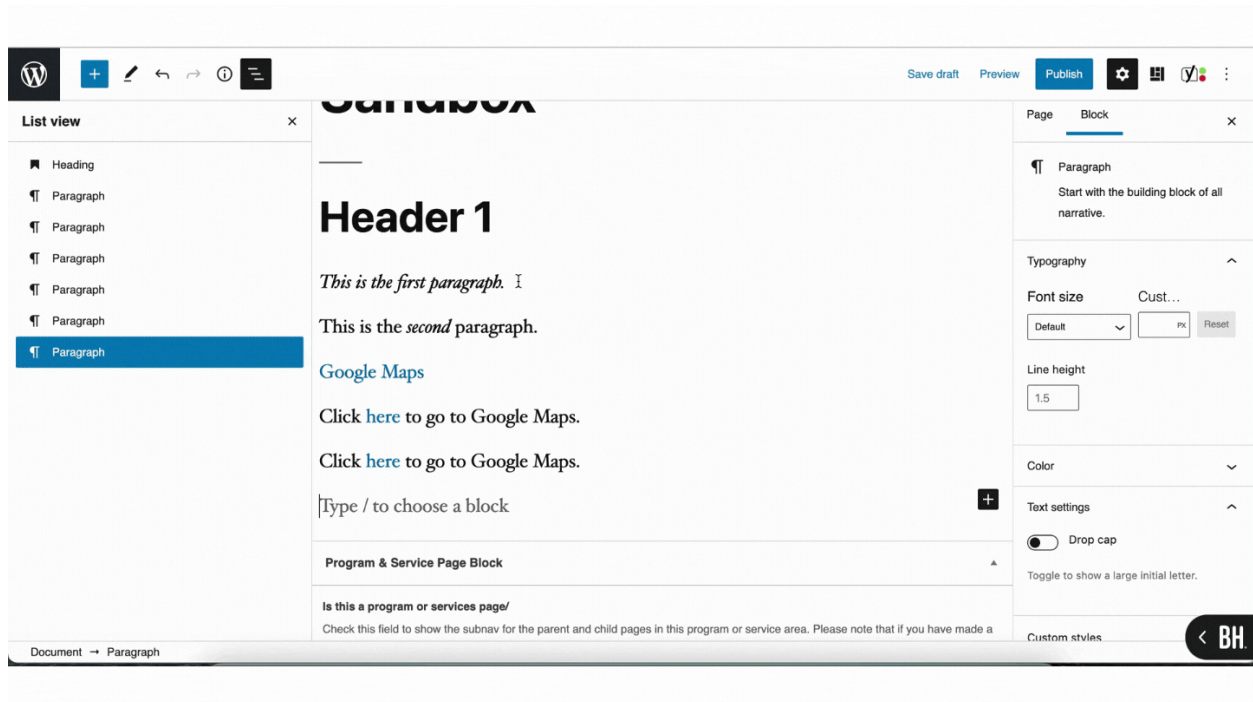
## Copy

Copy a block then paste it anywhere in the content editor. You can copy and paste between any Word Press project.



## Duplicate

Duplicate is a one-step process to the copy and paste tool, inserting the copy below the original.

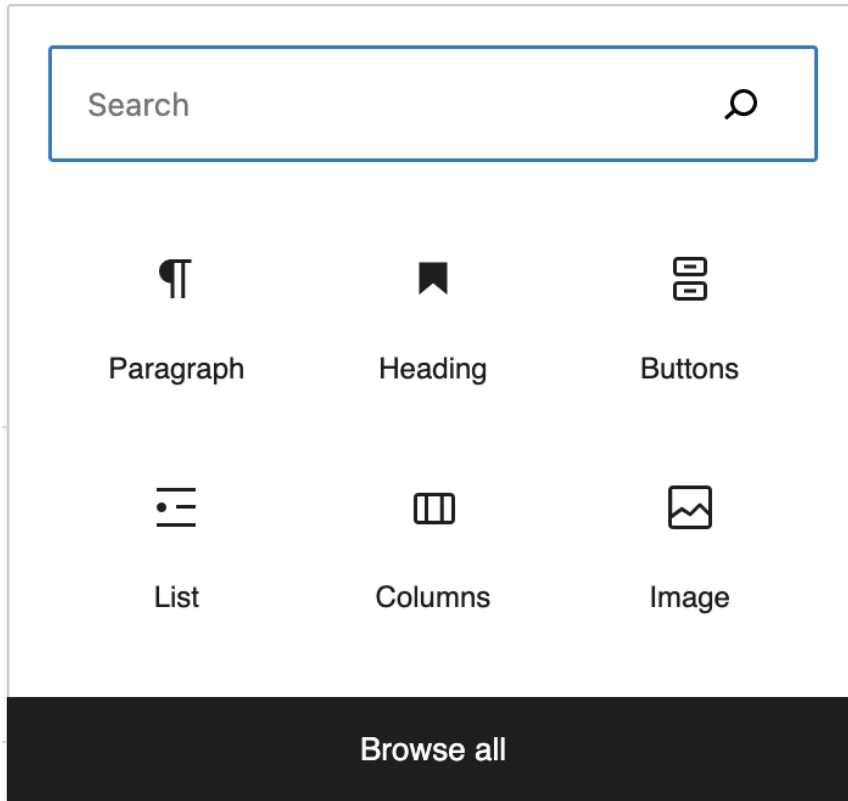


## Image

### Add Block

The image block allows you to insert an image. You can format images in different ways. When you click inside the image block you will see the block toolbar pop up right above the block.

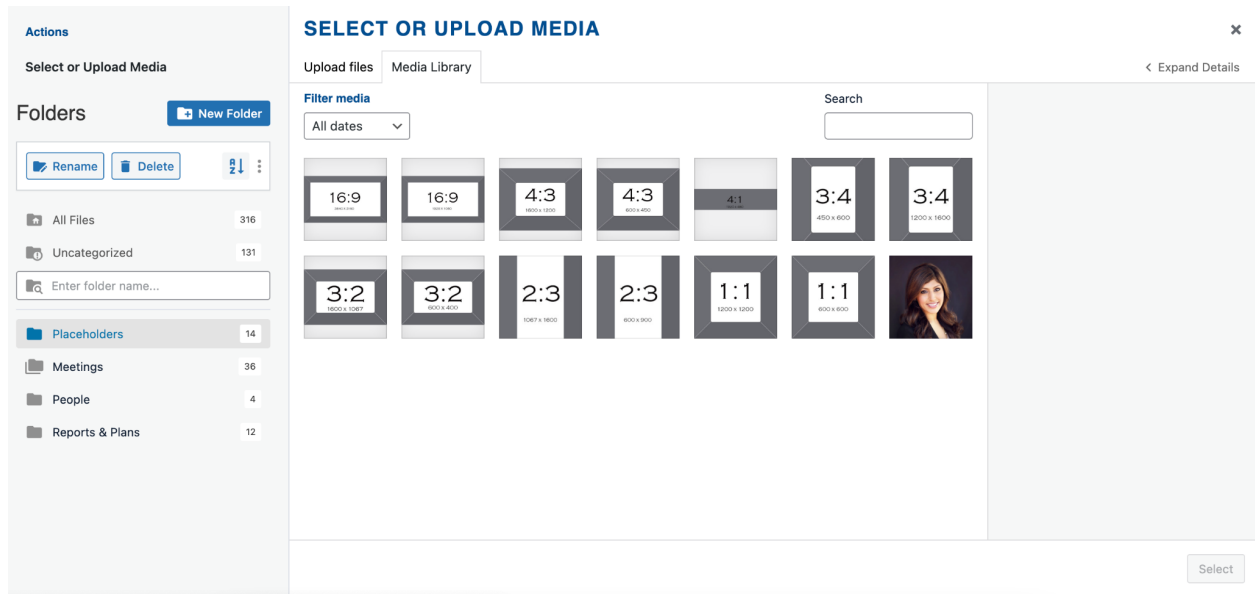




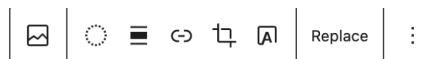
When you click on the Image icon the image block will appear. You can upload directly from your computer or upload from an image in the Media Library. You can also insert from a URL, however that is highly discouraged. In almost all cases, you will want to add content to the Media Library before adding it to an image block.



When you click on the Media Library, the Media Library will open. Select an image then click Select at the bottom right.

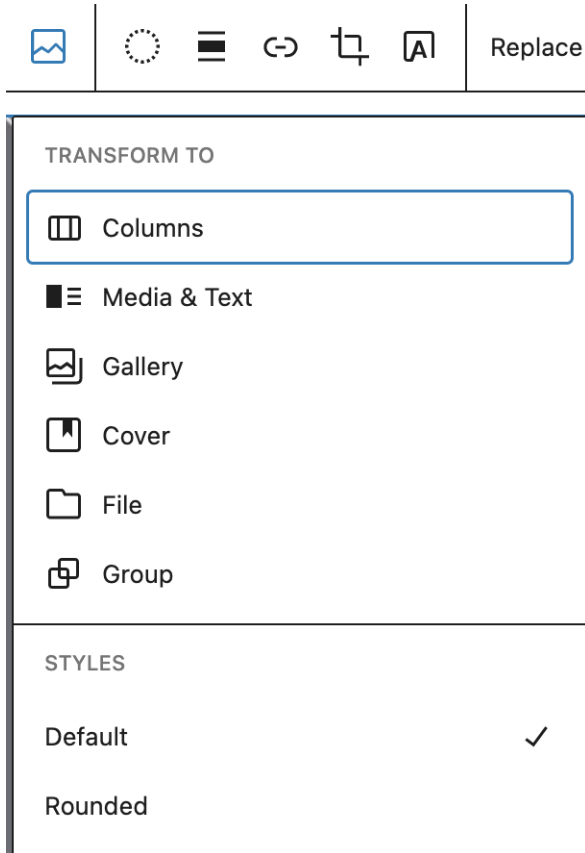


The image will appear in the Content Editor. You will see the image toolbar right above the image.



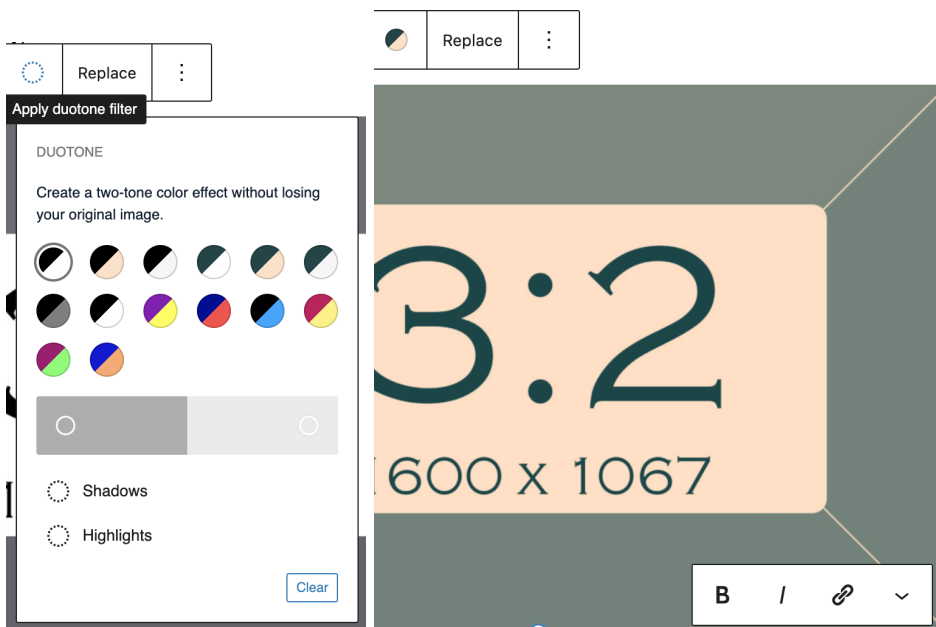
## Transform Tool

The first icon is the transform tool. You can transform the image to other blocks similar to the image block.



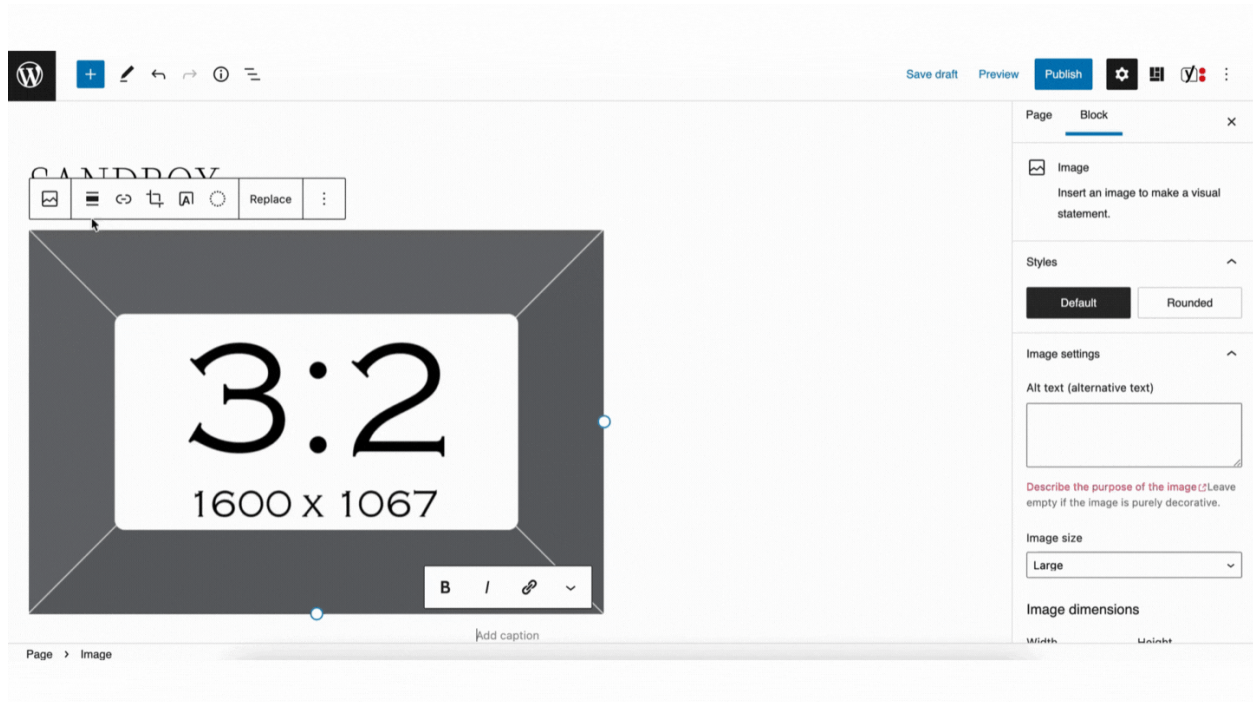
## Duotone Filter Tool

The Duotone Filter Tool allows you to change the filter of the image.



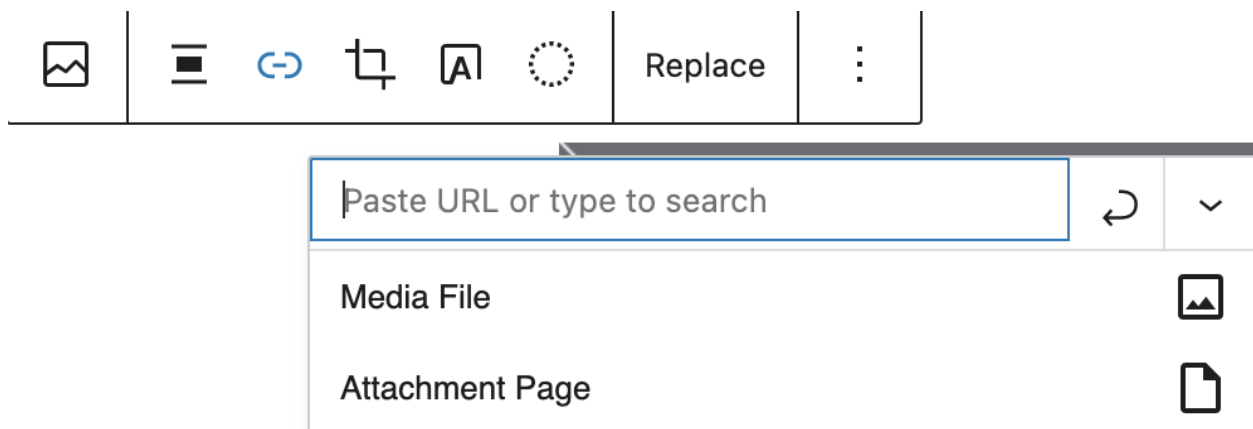
## Change Alignment Tool

The Change Alignment tool allows you to align the image to the left, center, or right.



## Insert Link Tool

The next icon is the Insert Link tool. You can insert a link so that when someone clicks on the image it will take you to page on your site, an external site, or an attachment.



## Crop Tool

The next icon is the Crop tool. It allows you to crop the image from the Content Editor. However, it is highly discouraged. It is recommended to upload and insert an image that has already been resized and optimized.



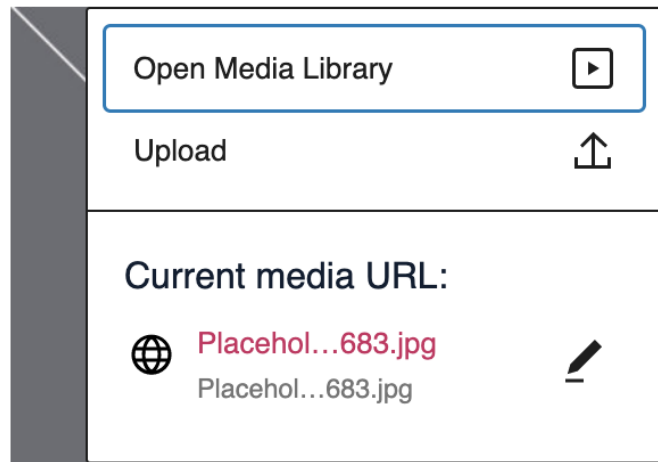
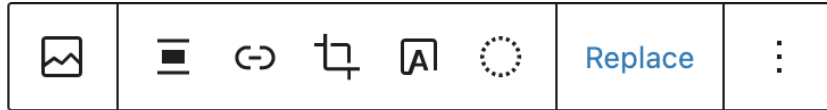
## Cover Tool

The next icon allows you to add text on top of the image. When this is done, it turns the image block into a cover block.



## Replace Tool

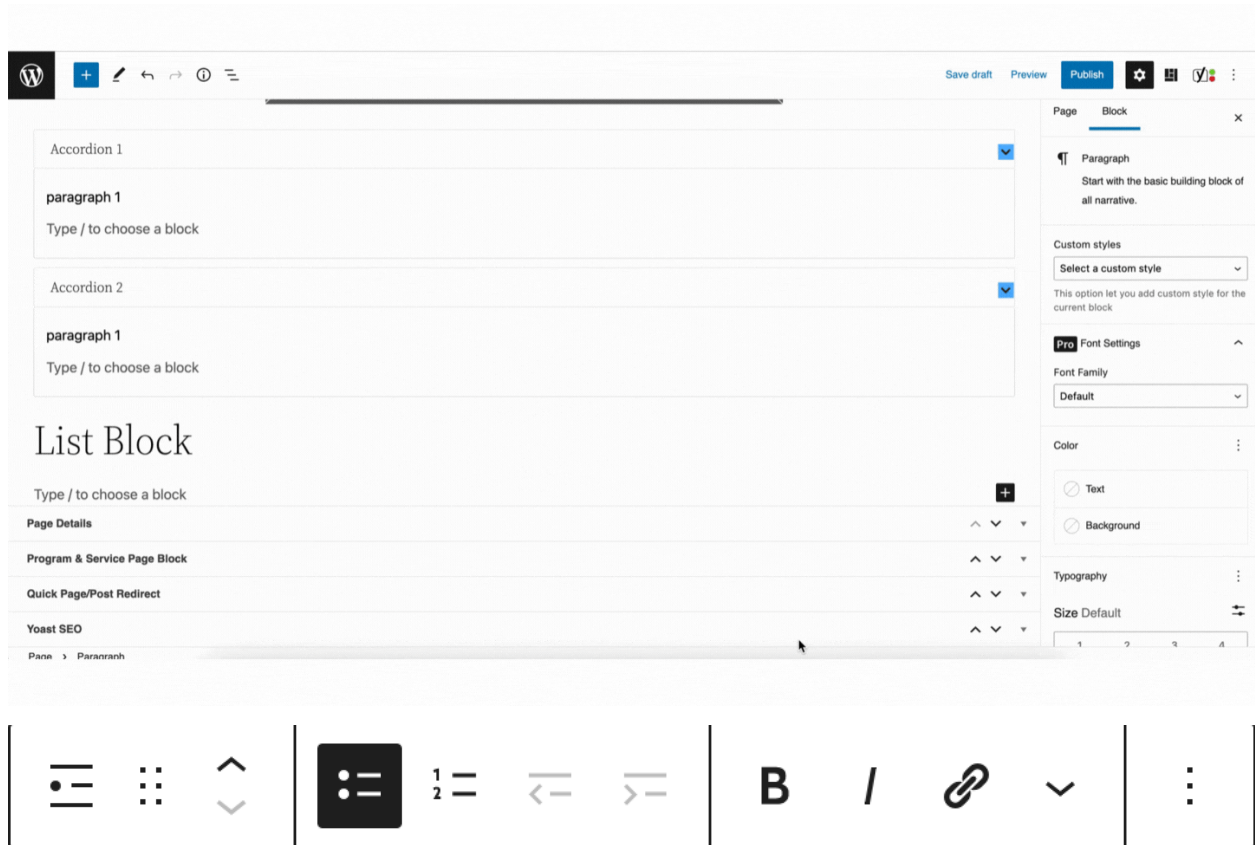
The next icon is the Replace tool. You can replace the current image with an image from the Media Library or by uploading from your computer.



## List

### Add a List block

You can create ordered (numbers) or unordered (bullet) lists.

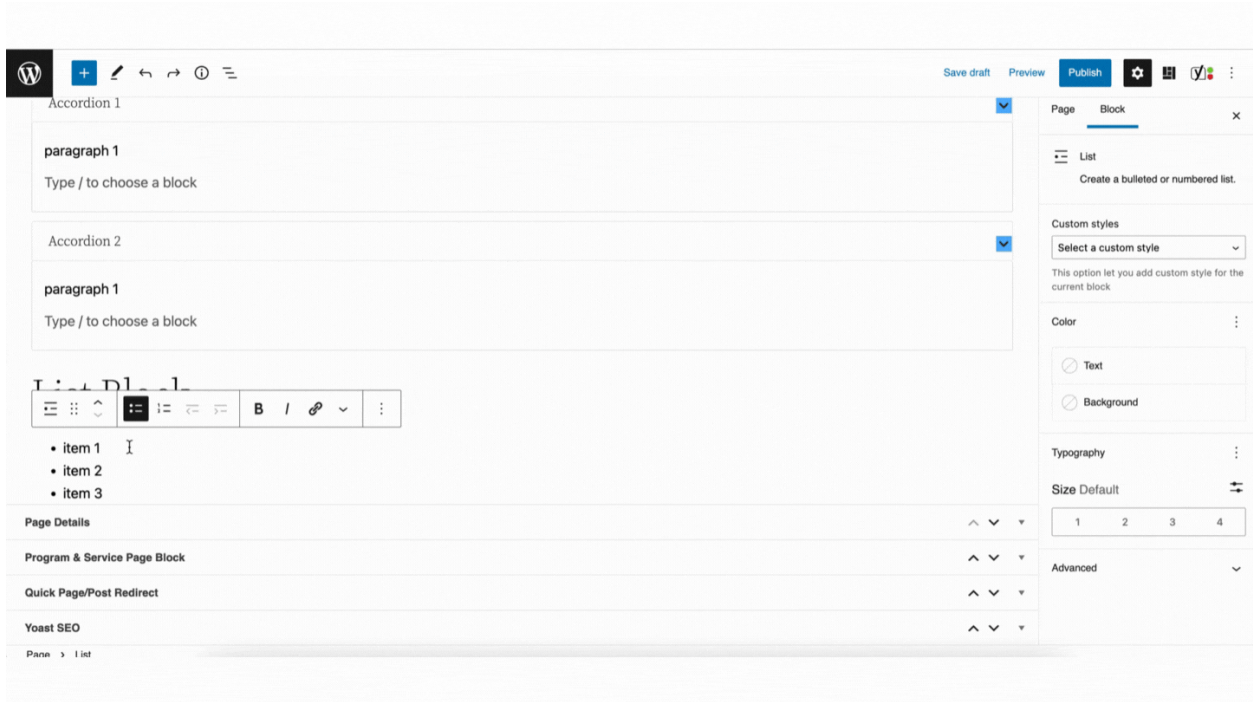


- List

## Toolbar

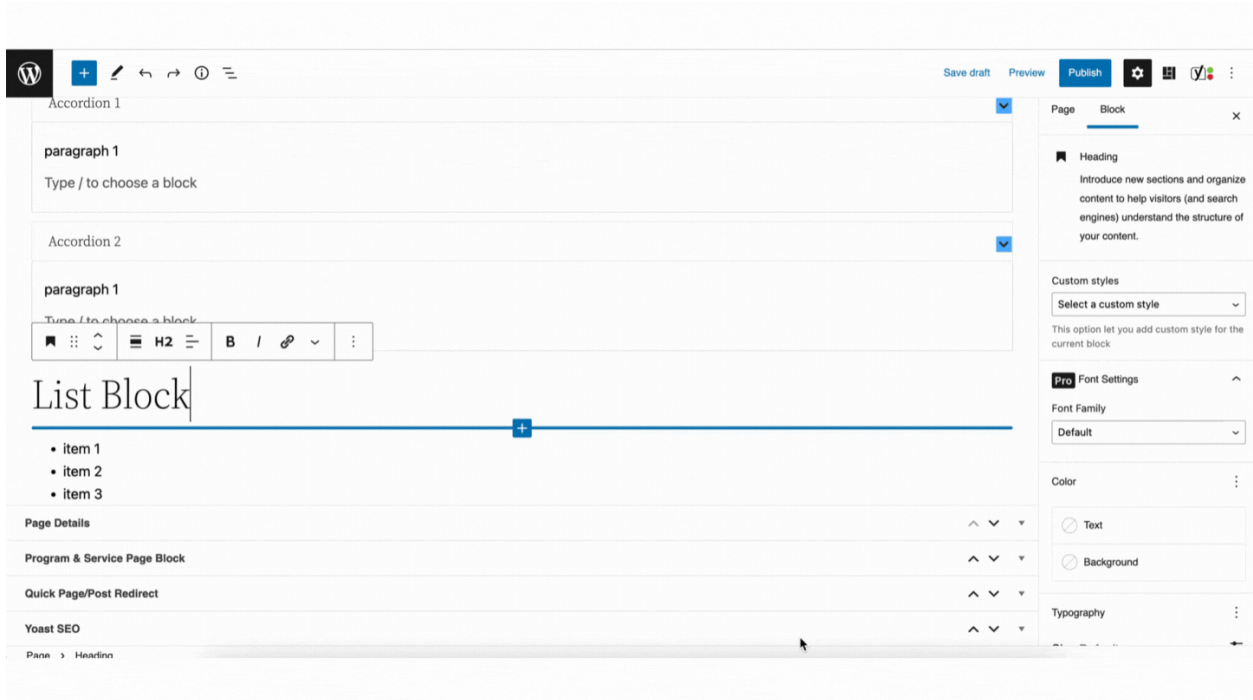
Transform Tool

You can transform the list block to another block similar to it.



### Drag Tool

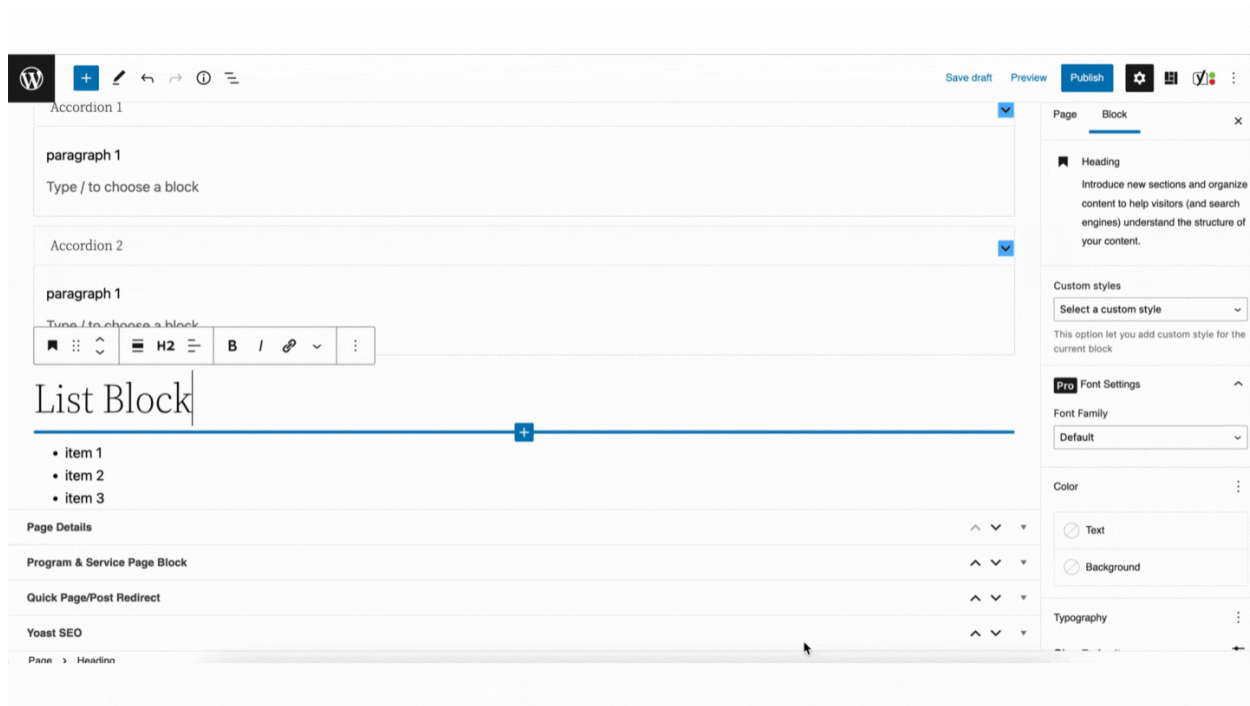
The Drag tool allows you to move the list block to another location.





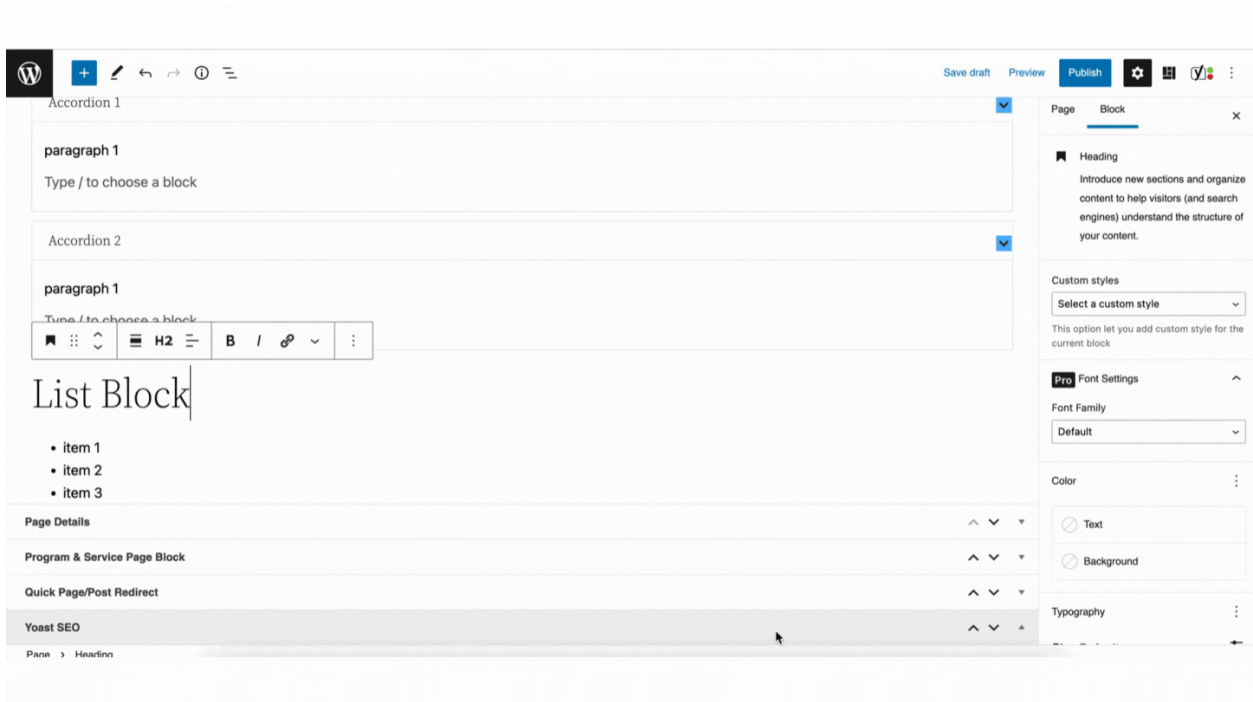
## Up/Down Tool

The Up/Down tool allows you to move the block up one spot or down one spot.



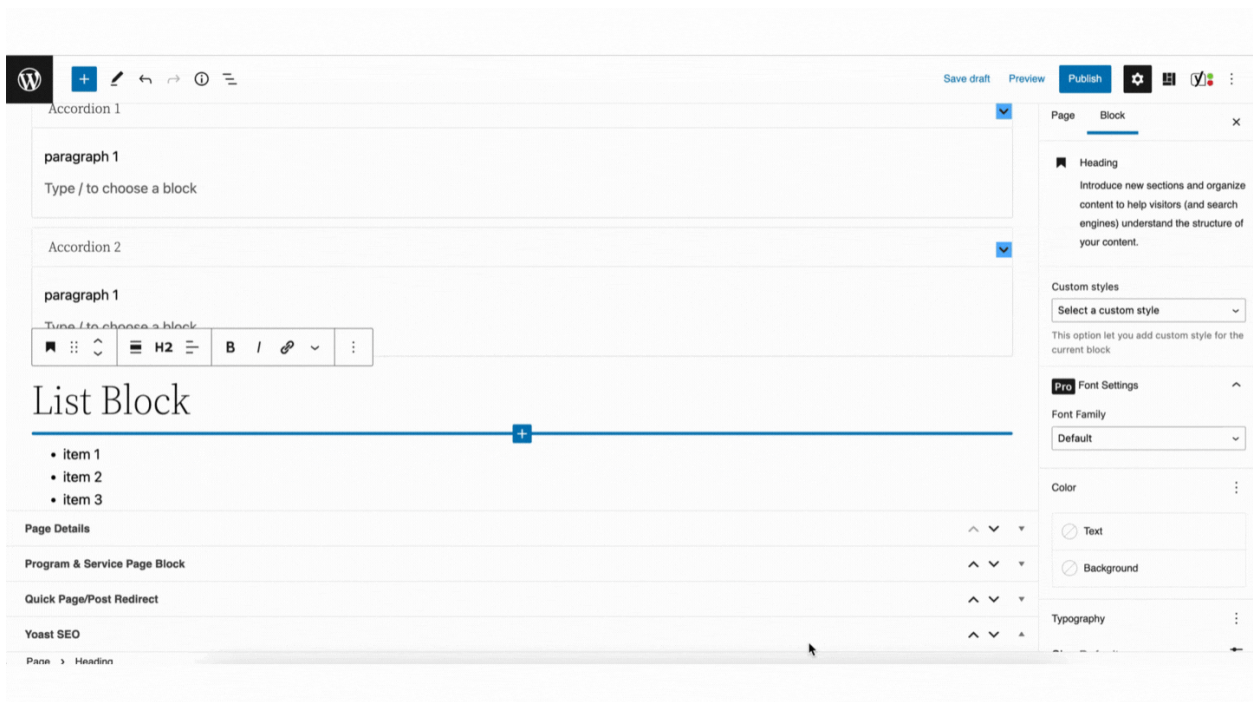
## Unordered and Ordered List Blocks

The Unordered and Ordered List Blocks allow you to change the list from an unordered list to an ordered list and vice versa.



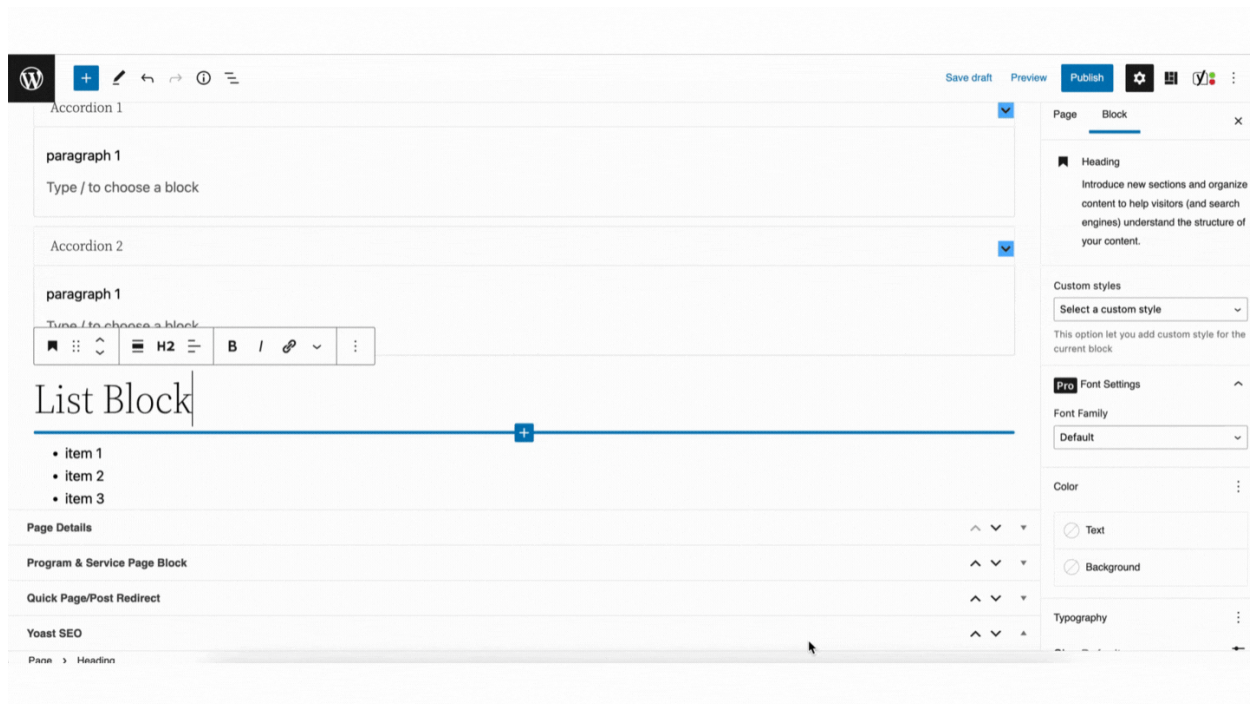
## Indent Tool

The Indent tool allows you to create subitems.



## Bold, Italic, Link Tools

The bold, italic, link tools allow you to bold, italicize, or link words in a list.

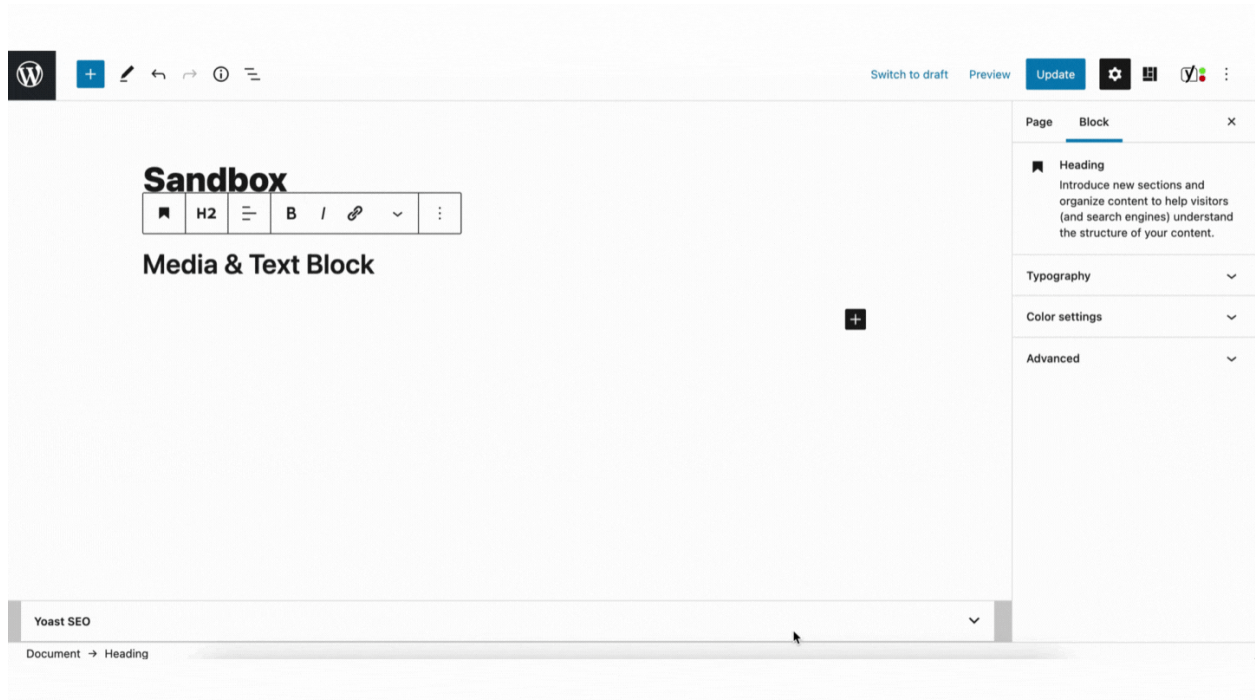


## Media & Text

The Media & Text block allows you to align an image and text horizontally.

### Add Media & Text Block

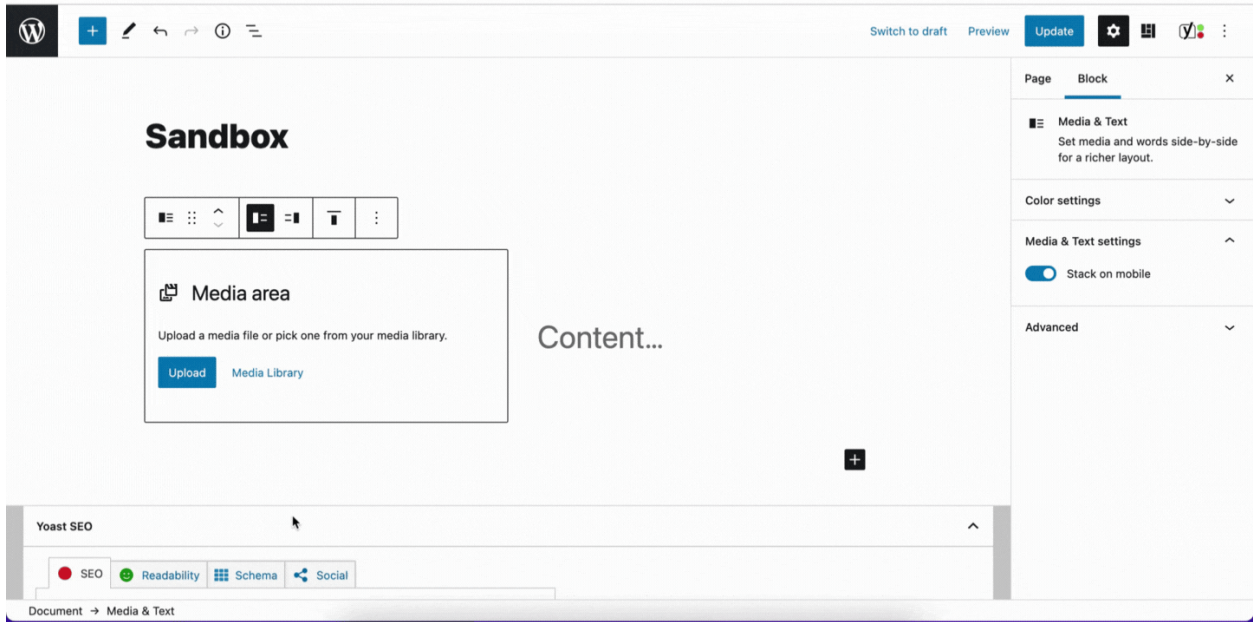
1. Add a new block
2. Click on the white plus button with black box
3. Search for Media & Text
4. Click on the Media & Text icon. The Media & Text block will appear in the content editor



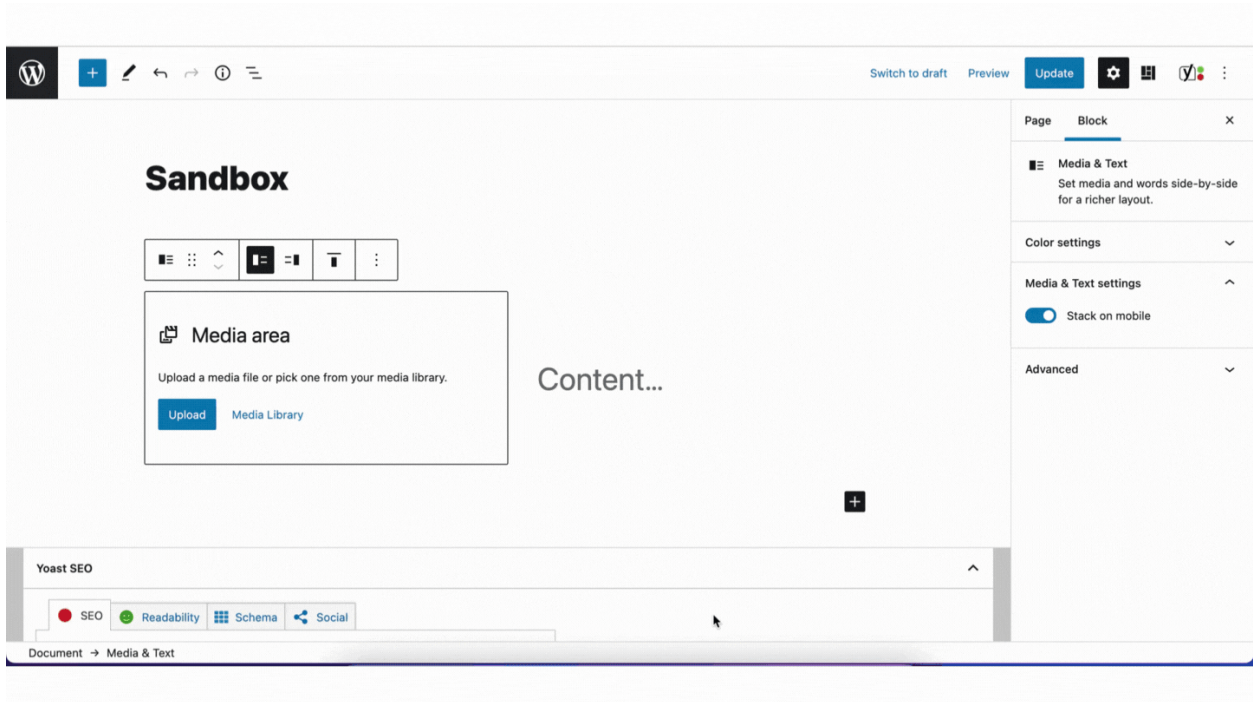
## Insert Image

There are two ways you can insert an image - uploading from your local drive or insert from the Media Library. In our case, you almost always want to add content to the Media Library first.

## Upload



## Insert from Media Library



## Resize Image

The screenshot shows the WordPress editor interface. At the top, there's a navigation bar with icons for adding blocks, undo, redo, and help. The main content area is titled "Sandbox" and contains a "Media & Text Block". Inside this block, there's a sunset image on the left and a "Heading 2" on the right. Below the heading, there's a button that says "Add a Button". The right sidebar is open to the "Block" settings for the "Button" block. It shows a preview of the button, a "Fill" color selector, and "Outline" settings. Below that, there are sections for "Color settings", "Border settings" (with a "Border radius" slider set to 5), and "Width settings". At the bottom, there's a "Yoast SEO" section with tabs for "SEO", "Readability", "Schema", and "Social". The breadcrumb trail at the bottom reads "Document → Media & Text → Buttons → Button".

## Insert Content

You can add any block to the Content section of the Media & Text block.

The screenshot shows the WordPress editor interface. The main content area is titled "Sandbox" and contains a "Media & Text Block". Inside this block, there's a sunset image on the left and a "Content..." placeholder on the right. The right sidebar is open to the "Page" settings. It shows "Status & visibility" with "Visibility" set to "Public", "Publish" date "07/14/2022 12:07 pm", and "Author" set to "Crystal Menard". There are links for "Copy to a new draft", "Rewrite & Republish", and "Move to trash". Below that, there's a "Video Tutorials" section and a "Yoast SEO" section with "Readability analysis: Good" and "SEO analysis: Needs improvement". At the bottom, there's a button that says "Improve your post with Yoast SEO". At the bottom left, there's a "Yoast SEO" section with a "Document" tab.

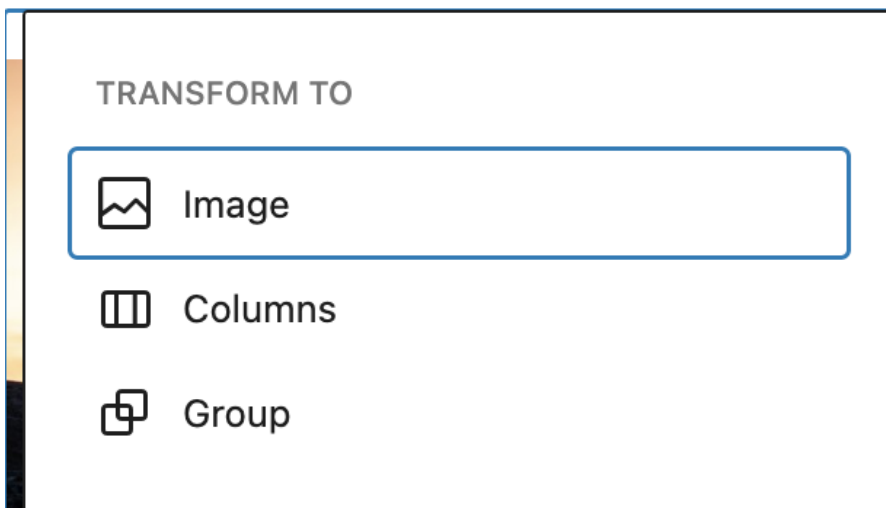
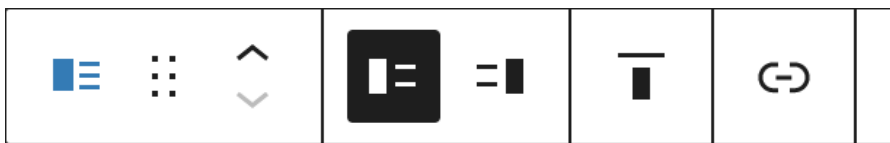
## Media & Text Block Toolbar

When you click on the Media & Text block the Media & Text toolbar will appear above the block.



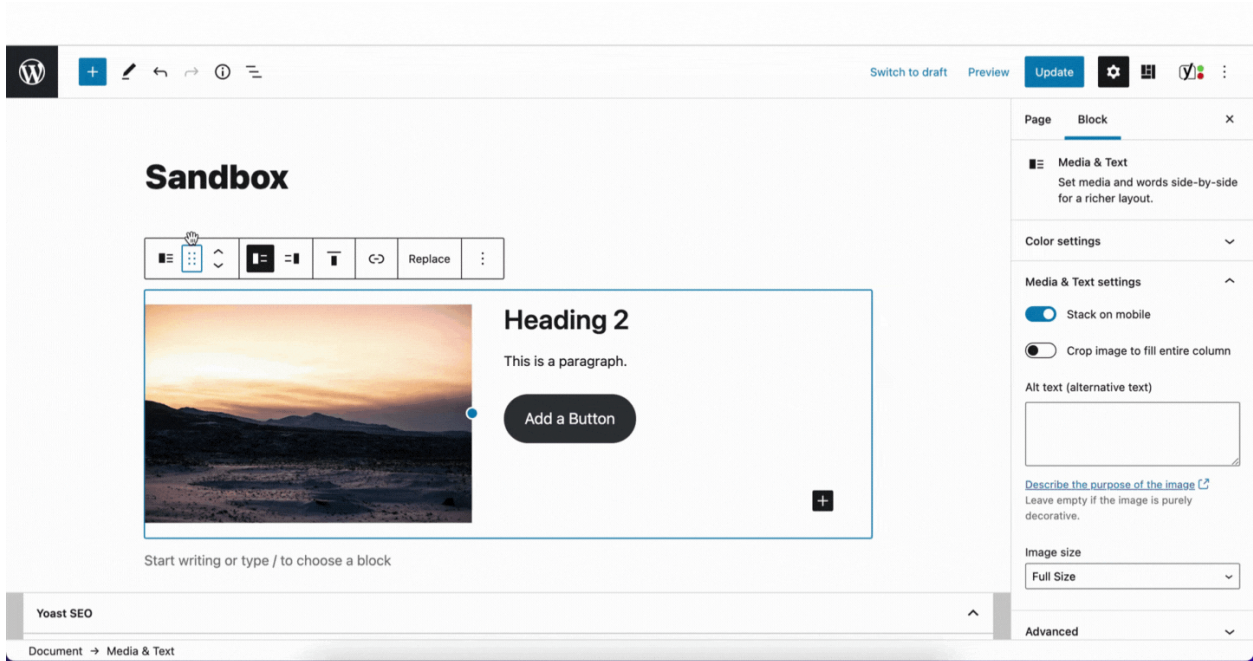
### Transform tool

The first icon is the Change block type or style tool. It allows you to change the block from Media & Text to other similar blocks.



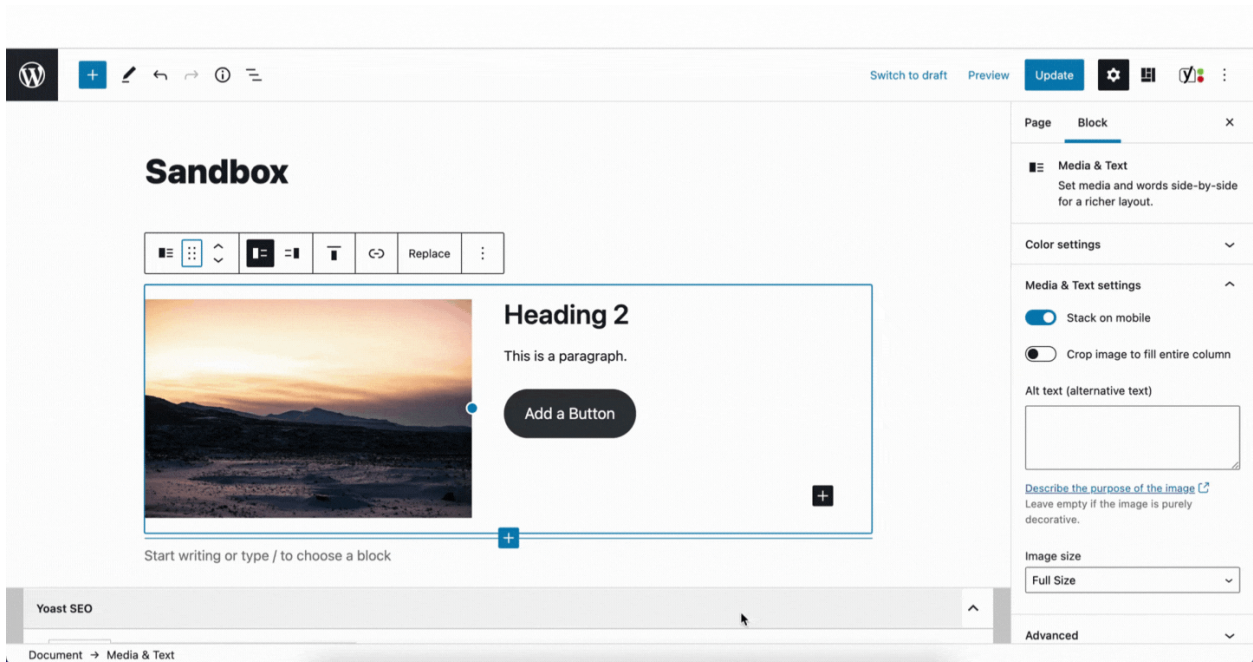
### Drag Tool

The next icon allows you to drag the block to other locations of the page.



## Move Up/Down Tool

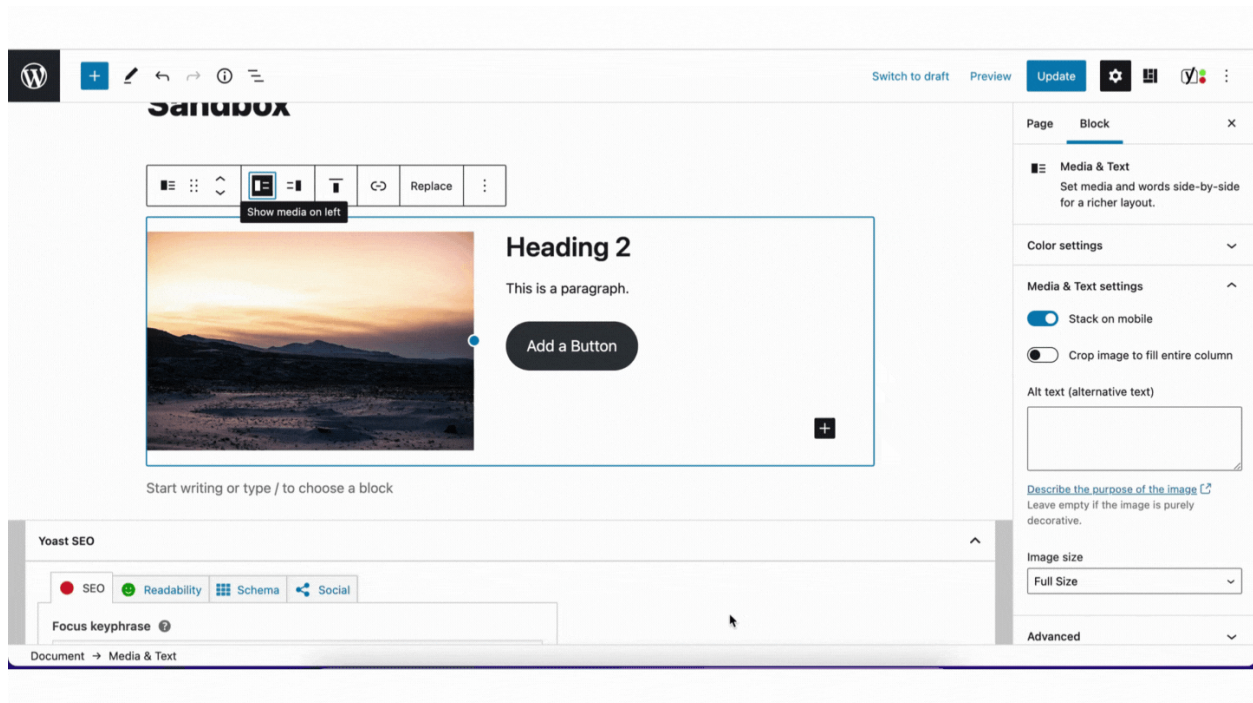
The Move Up/Down tool is similar to the Drag Tool. It allows you to move the block above or below other blocks, respectively.





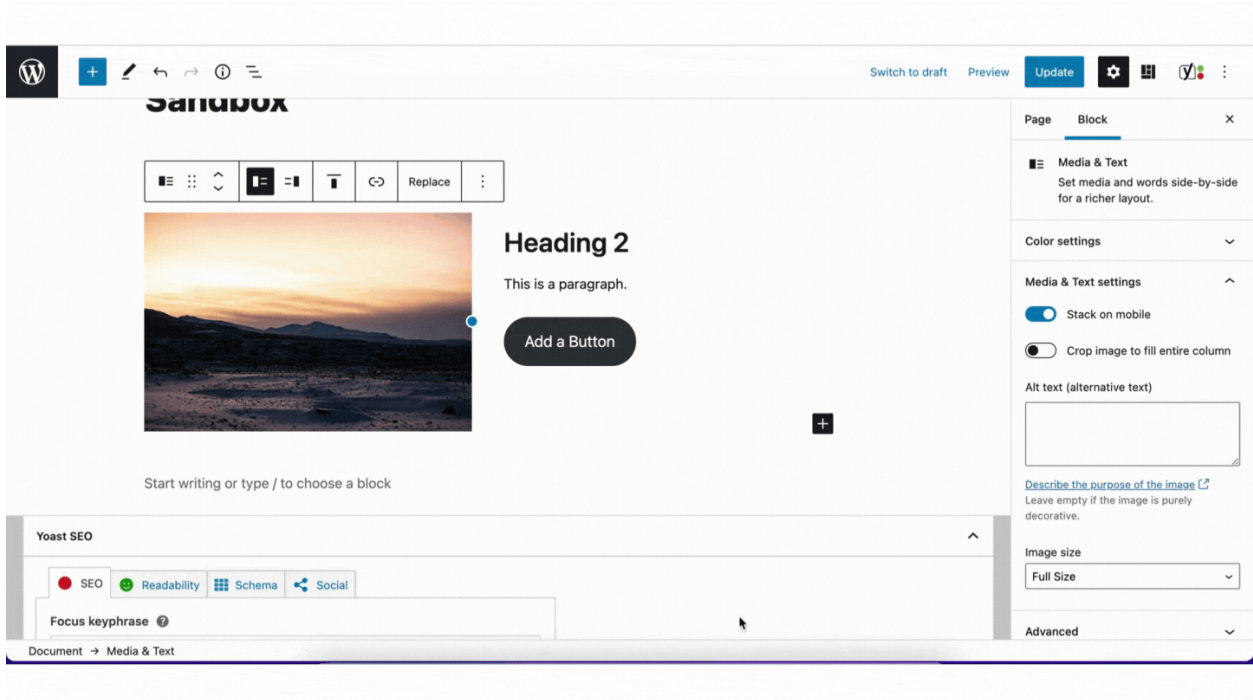
## Show Media On Left/Right

The next two icons allow you to move the image to the right or to the left with the content moving to the left or right, respectively.



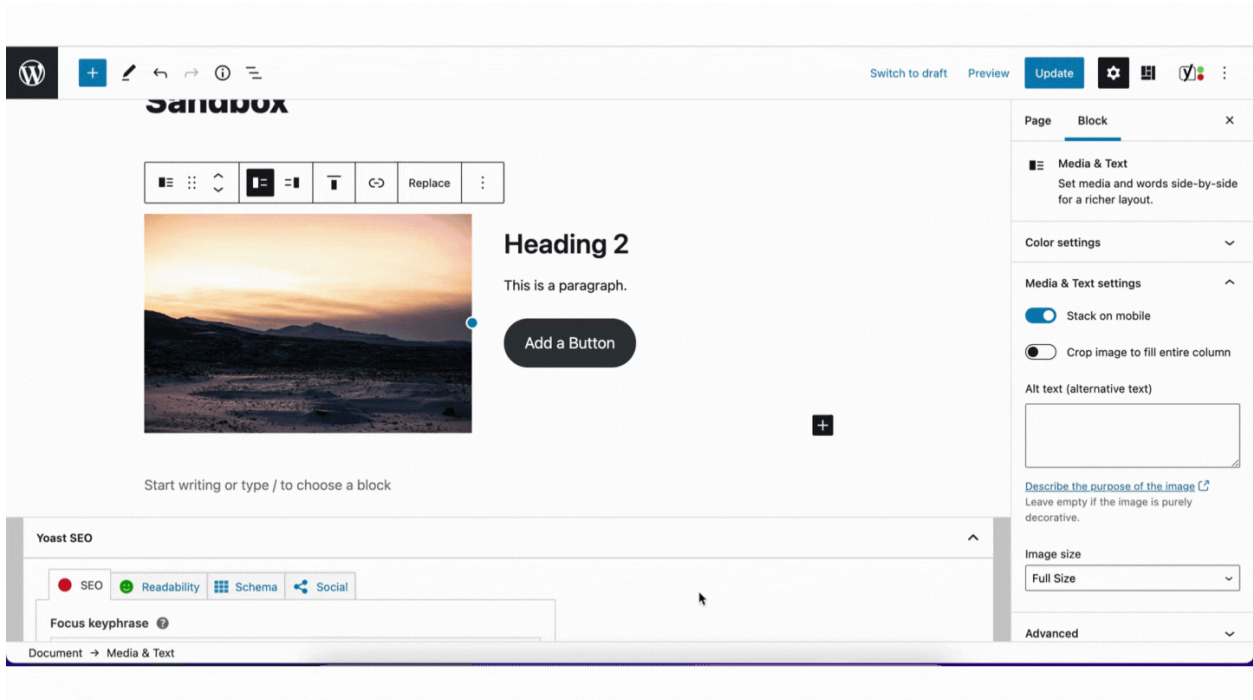
## Vertical Alignment Tool

The next icon allows you to change the alignment of the image to the top, middle, or bottom of the content.



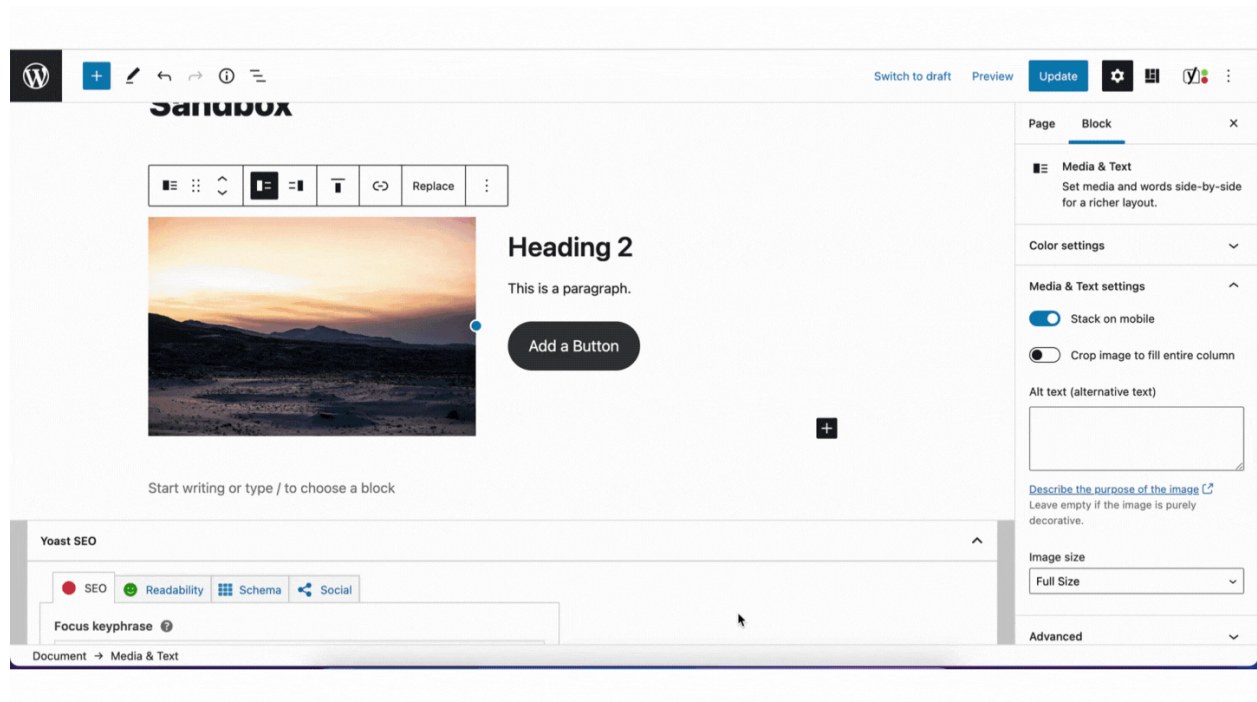
### Link Tool

The next icon is the Link tool. It allows you to add a link to the image. You can assign the link to open in a new tab.



## Replace Tool

The Replace tool allows you to replace the image with another image.



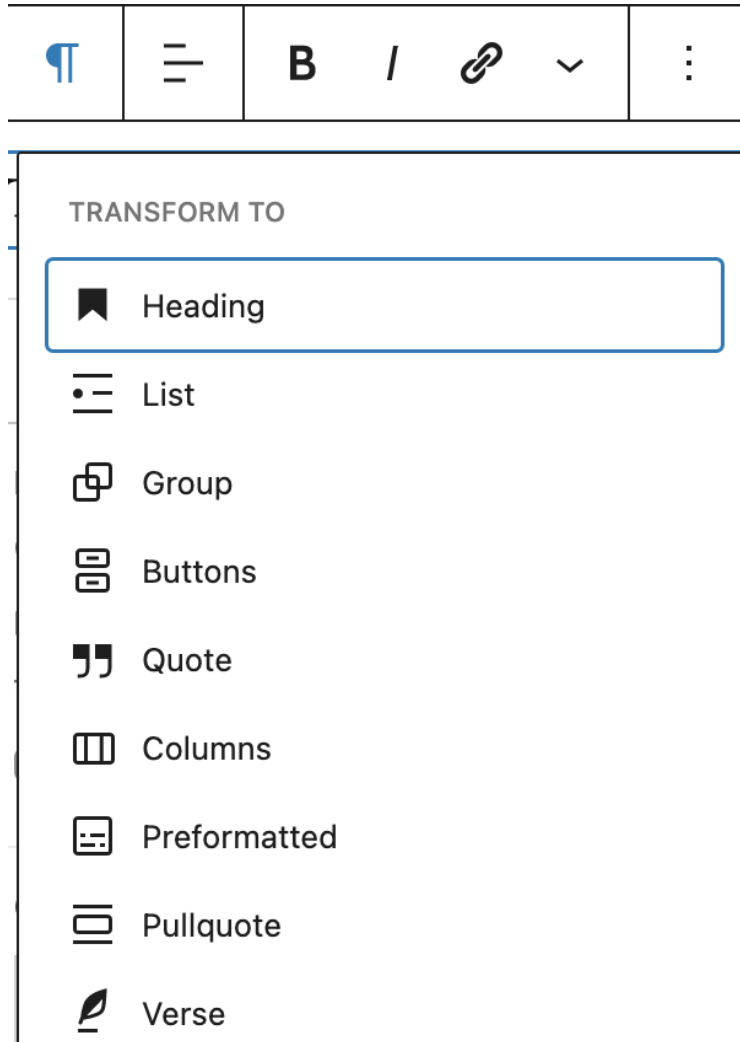
## Paragraph

The paragraph block allows you to write groups of text. You can format paragraphs in different ways. When you click inside the paragraph block you will see the block toolbar pop up right above the block.

You can Shift+Return to drop a line without creating a whole new paragraph block.

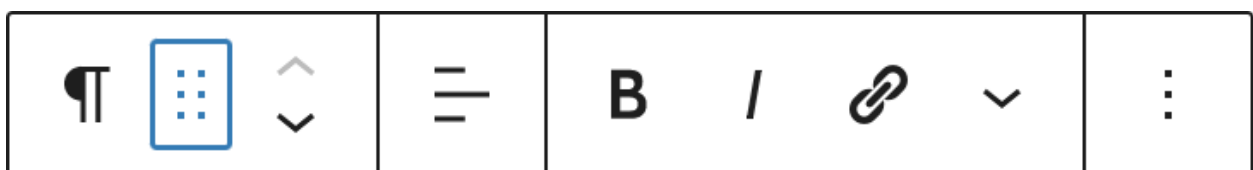
## Transform Tool

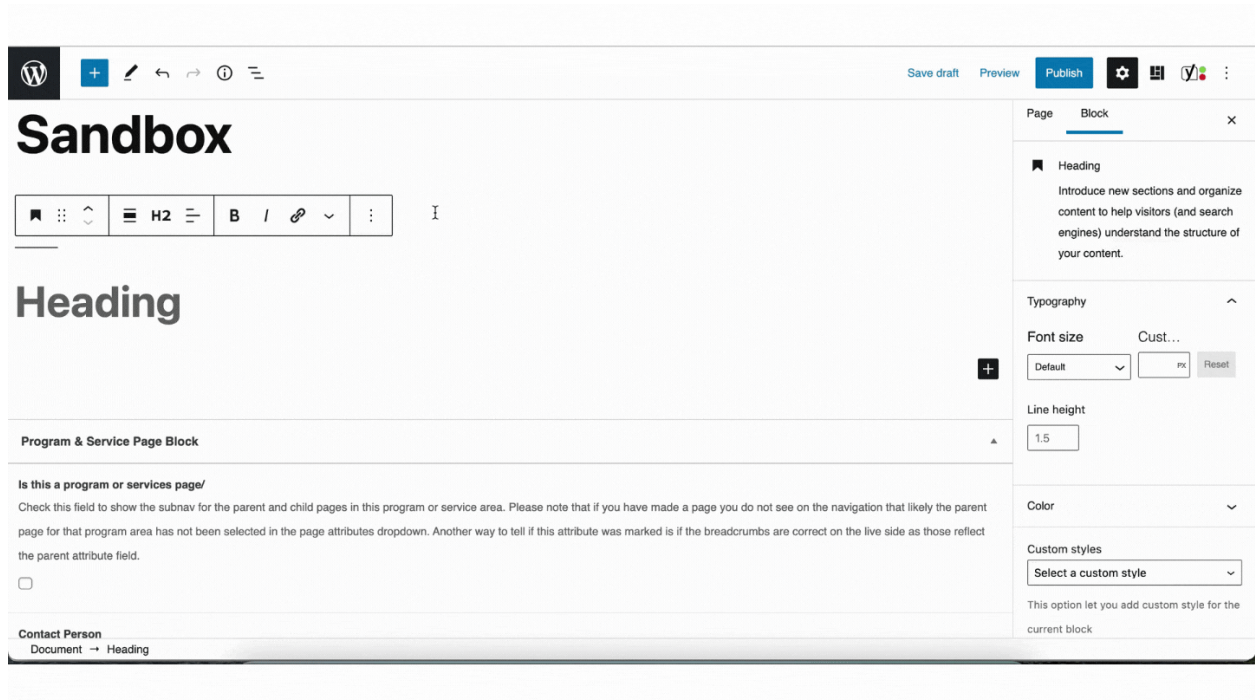
The first icon is the Transform tool. When you click on it you will have several options to change the paragraph block to other blocks similar to the paragraph block.



## Drag Tool

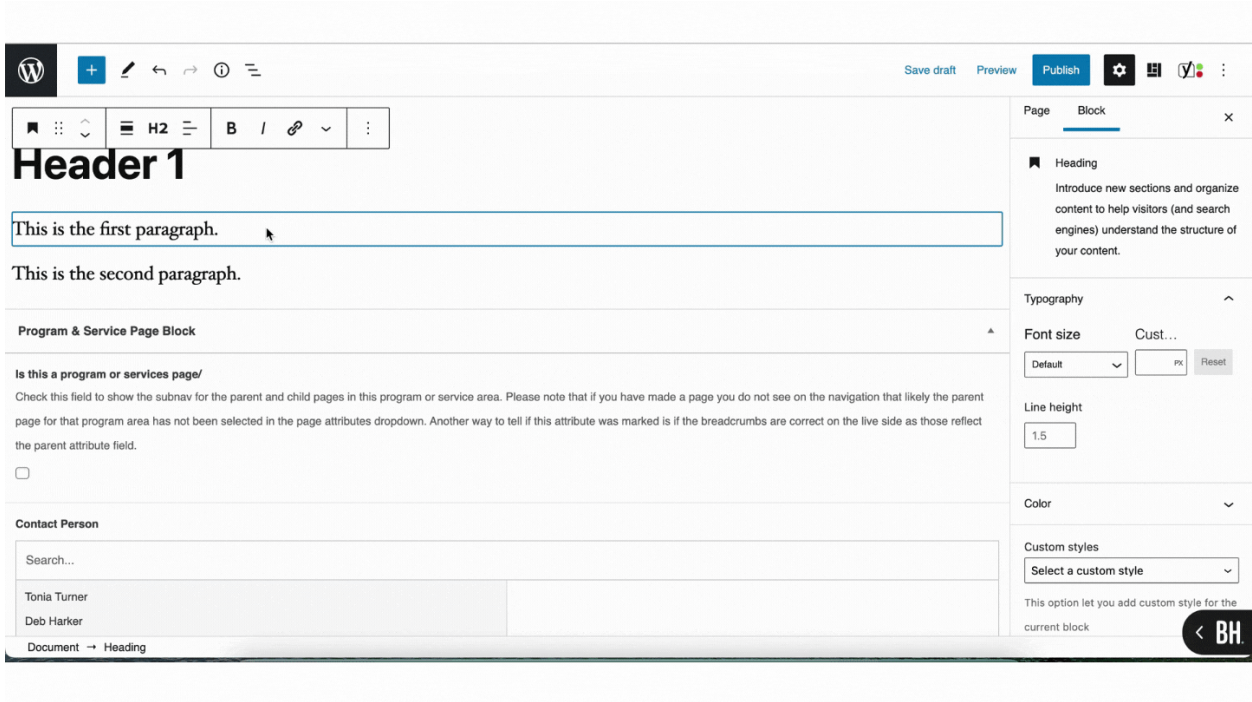
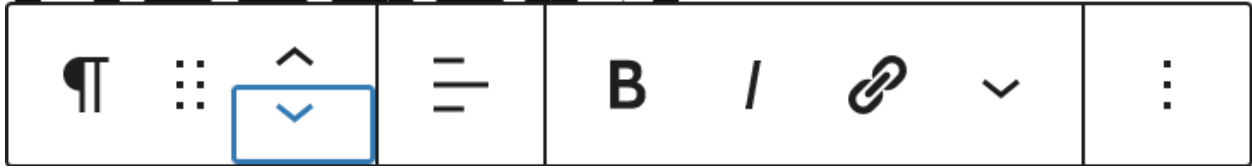
The next icon is the Drag tool. It allows you to move the block to other locations of the content editor.





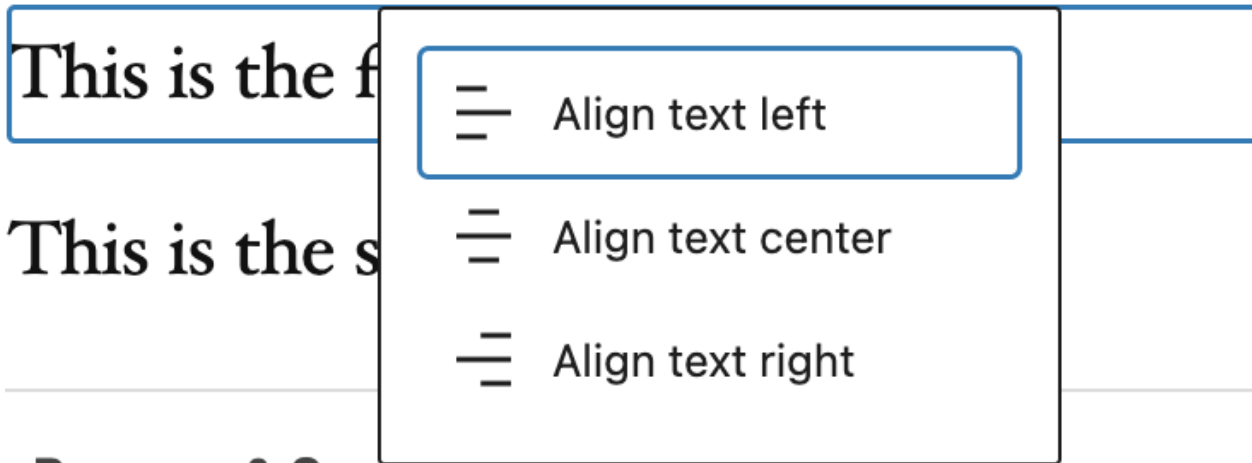
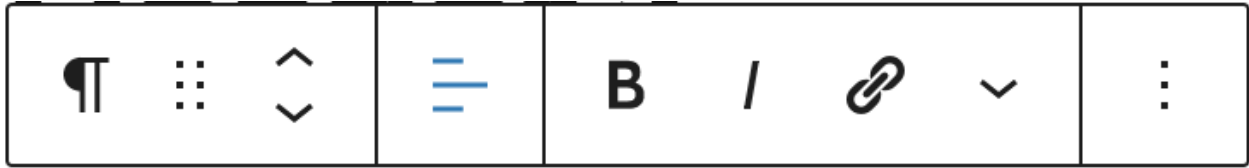
## Up/Down Arrow Tool

The next icon is the move down or up arrow. This is similar to the Drag tool. When you click on the up arrow or the down arrow, it moves the block above a block or below a block, respectively.



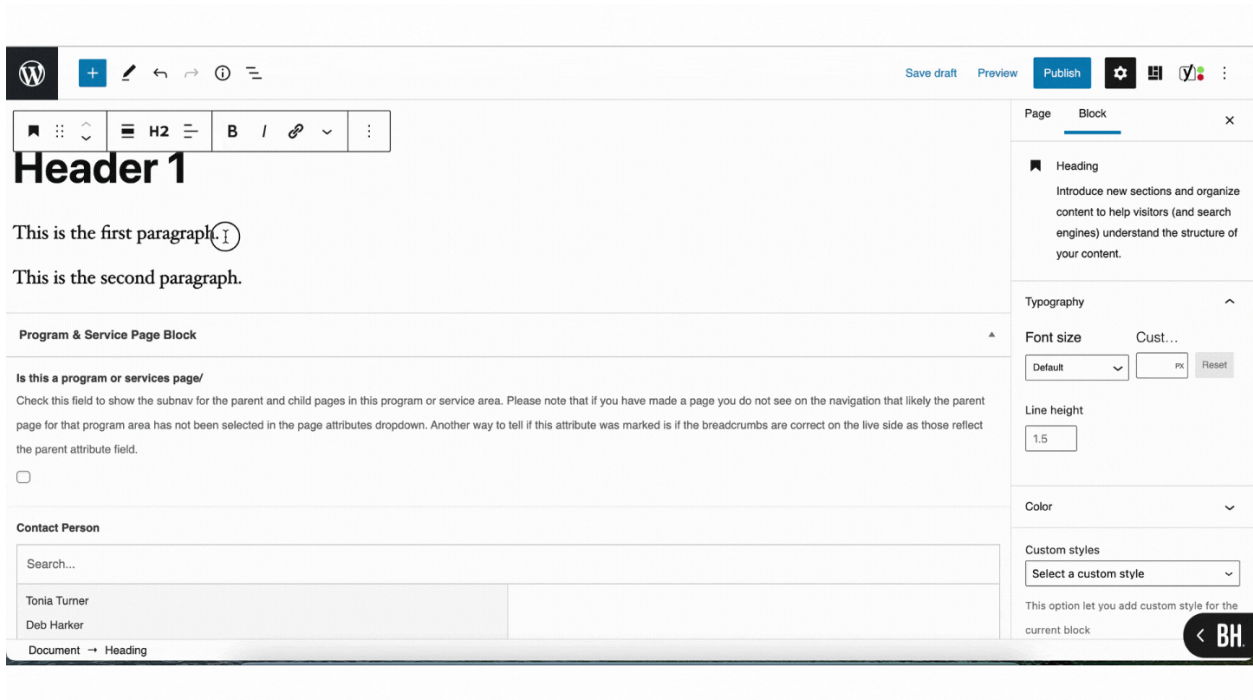
### Change Text Alignment Tool

The next icon is the Change Text Alignment tool. You can left align, center align, or right align text.



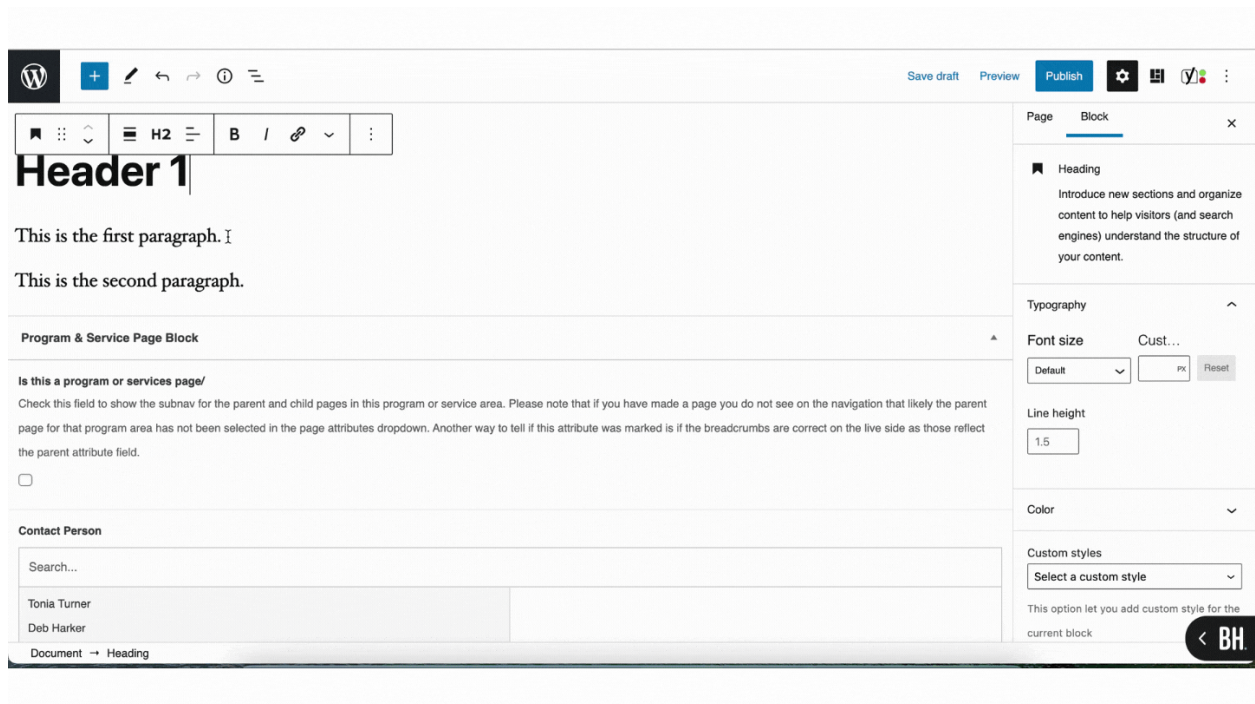
## Bold Tool

The next icon is the Bold tool. You can bold a whole block or individual words.



## Italics Tool

The next icon is the Italics tool. You can italicize a whole block or individual words.



The screenshot displays the WordPress Gutenberg editor interface. At the top, the WordPress logo and navigation icons are visible. The main editing area shows a heading block labeled "Header 1" and two paragraphs of text: "This is the first paragraph." and "This is the second paragraph." Below the text is a "Program & Service Page Block" with a checkbox labeled "Is this a program or services page/" and a "Contact Person" section with a search field and a list of names: "Tonia Turner" and "Deb Harker". The right-hand sidebar contains settings for the selected heading block, including "Page", "Block", "Heading", "Typography", "Font size", "Line height", "Color", and "Custom styles". The "Italics" icon (a slanted letter 'i') is highlighted in the block toolbar at the top left of the editor.

## Link Tool

The next icon is the Link tool.



You can link a whole block or individual words.



Header 1

This is the *second* paragraph.

Google Maps

Click here to go to Google Maps.

**Program & Service Page Block**

Is this a program or services page/  
Check this field to show the subnav for the parent and child pages in this program or service area. Please note that if you have made a page you do not see on the navigation that likely the parent page for that program area has not been selected in the page attributes dropdown. Another way to tell if this attribute was marked is if the breadcrumbs are correct on the live side as those reflect the parent attribute field.

**Contact Person**  
Document → Paragraph

Page Block settings: Paragraph, Typography (Font size: Default, Line height: 1.5), Color, Text settings (Drop cap: off), Custom styles: BH

The links can open up a new window or it can open on the same tab.

Header 1

*This is the first paragraph.*

Google Maps

Click here to go to Google Maps.

**Program & Service Page Block**

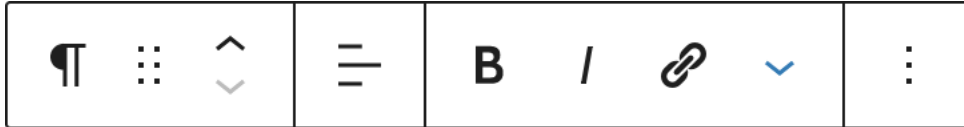
Is this a program or services page/  
Check this field to show the subnav for the parent and child pages in this program or service area. Please note that if you have made a page you do not see on the navigation that likely the parent page for that program area has not been selected in the page attributes dropdown. Another way to tell if this attribute was marked is if the breadcrumbs are correct on the live side as those reflect the parent attribute field.

**Contact Person**  
Document → Paragraph

Page Block settings: Paragraph, Typography (Font size: Default, Line height: 1.5), Color, Text settings (Drop cap: off), Custom styles: BH

### More Tool

You may see what these tools do and how they work, but they are rarely used so please use at your discretion.






Click [here](#) to go to Google M

#### Program & Service Page Block

##### Is this a program or services page/

Check this field to show the subnav for the page. If the program area has not been selected in the parent attribute field.

- < > Inline code
-  Inline image
-  Keyboard input
-  Strikethrough
- $X_2$  Subscript
- $X^2$  Superscript
- A Text color

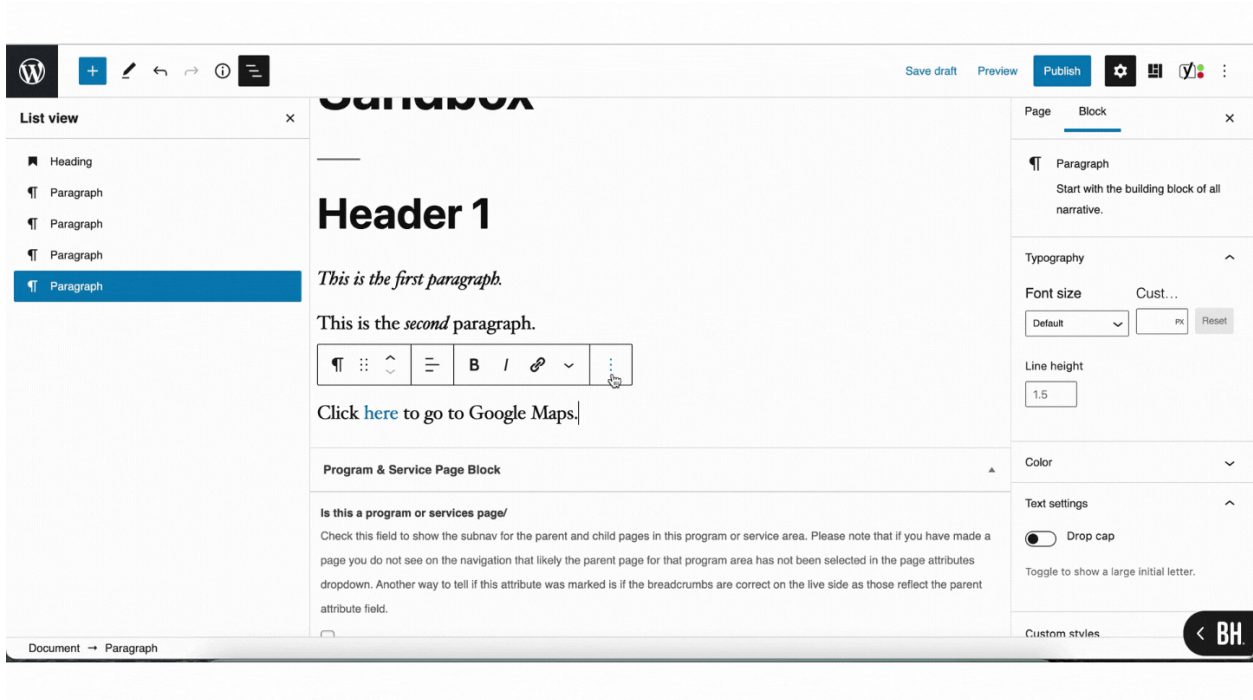
### Options Tool

This tool is in all blocks.

<p>Click <a href="#">here</a> to go to Google Maps.</p>			<p><b>Options</b></p>
<p><b>Program &amp; Service Page Block</b></p>			<p>Hide more settings </p> <p><b>Copy</b></p>
<p><b>Is this a program or services page/</b> Check this field to show the subnav for the parent and page for that program area has not been selected in the parent attribute field.</p> <p><input type="checkbox"/></p>			<p>Duplicate </p> <p>Insert before </p> <p>Insert after </p> <p>Move to</p> <p>Edit as HTML</p>
<p><b>Contact Person</b></p> <p>Search...</p>			<p>Add to Reusable blocks </p> <p>Group</p>
<p>Document → Paragraph</p>			<p>Remove block </p>

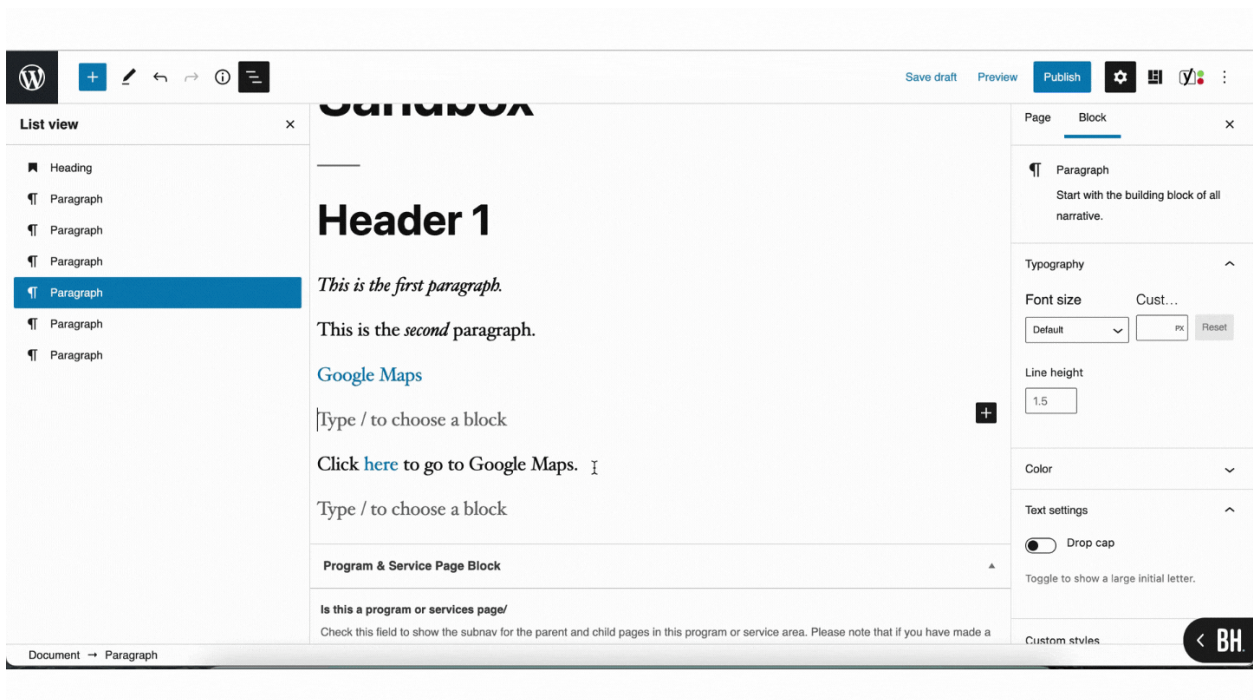
## Insert before/Insert after

Insert a block before or after an existing block



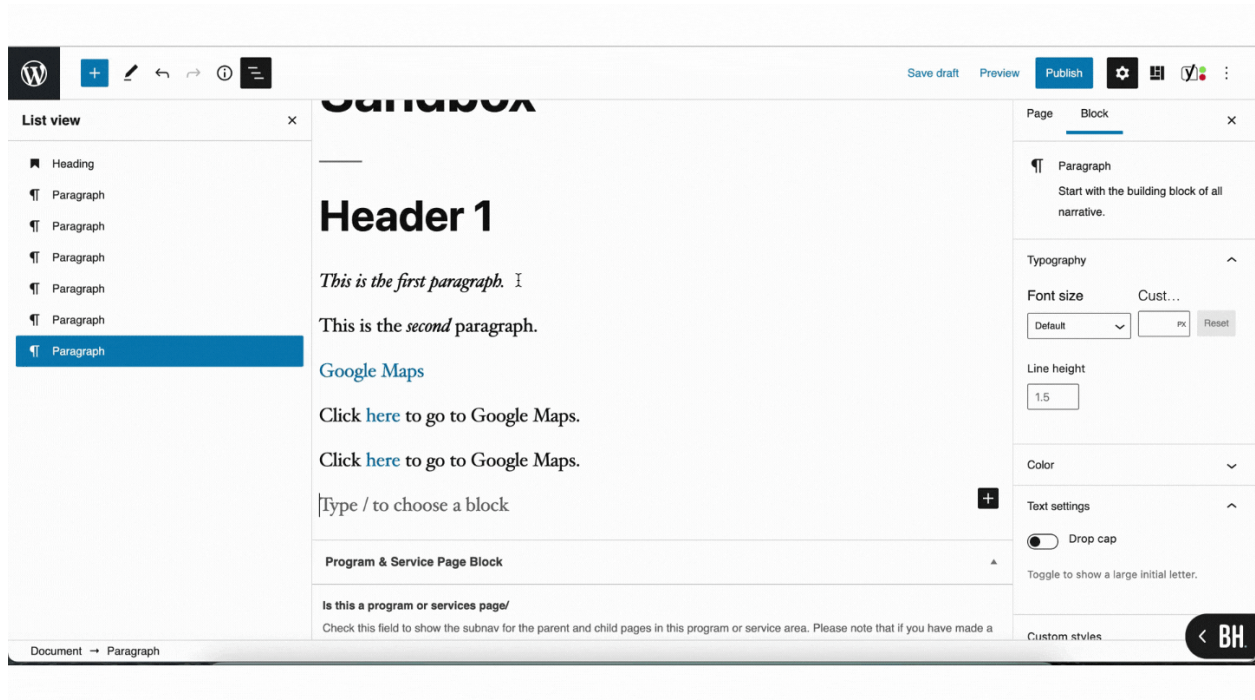
## Copy

Copy a block then paste it anywhere in the content editor. Content can carry over to any Word Press site you might work on.



## Duplicate

Duplicate is a one-step process to the copy and paste tool.



## Gravity Forms

Gravity Forms allow you to collect data from users on your site by making a fillable page which is then sent back to the administrator.

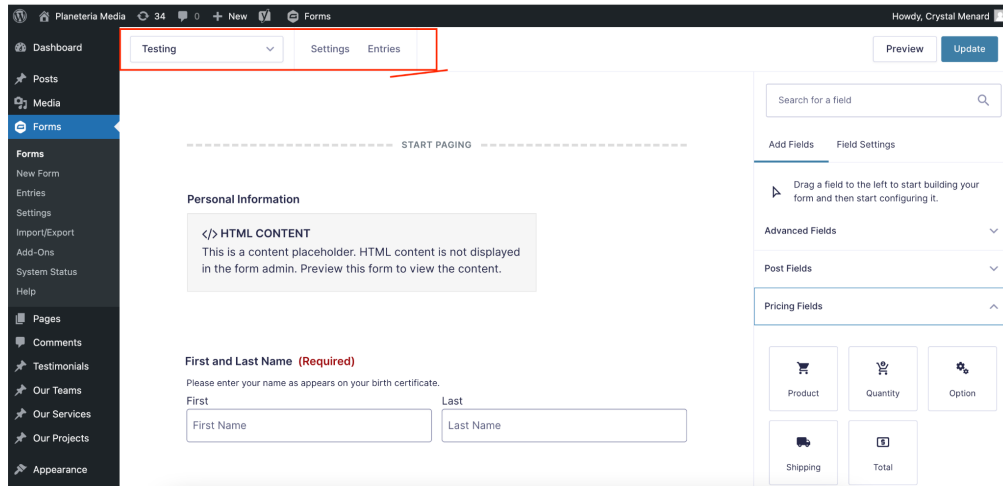
From the Forms tab in the Dashboard, you can add, edit, remove, and modify form settings, as well as quickly get to Notifications and Confirmations.

### Create Form

1. Click on the Forms tab in the Dashboard
2. Click on Add New
3. Add a Form title and/or Description
4. Click on Create Form

5. Drag fields from the right pane to the editor field of the forms or simply click the needed field and it will appear at the bottom of your form
6. Click on a field to edit settings in the panel to the right
7. Click on Update to save your changes

When you are in a form editor, you can go to the settings and Entries section of that form.

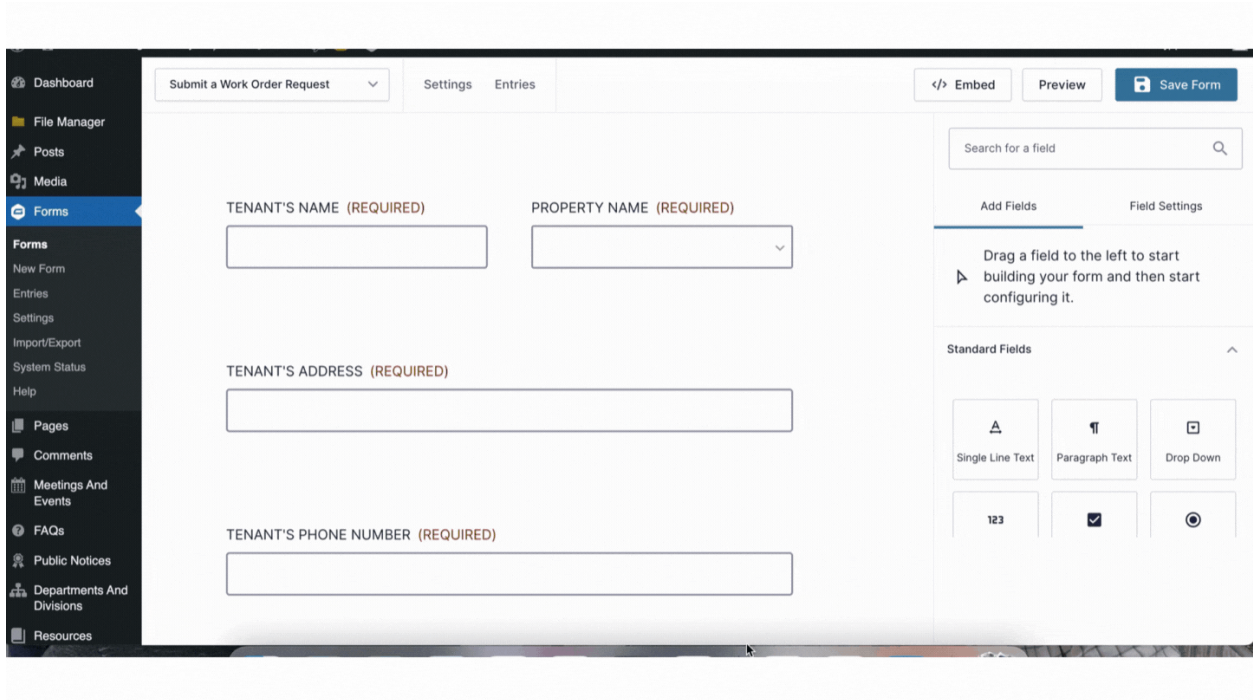


## Fields

All fields have the same toolbar that shows above the field when it is clicked on.



The first icon is the drag tool. You can drag and drop fields to different locations of the form.



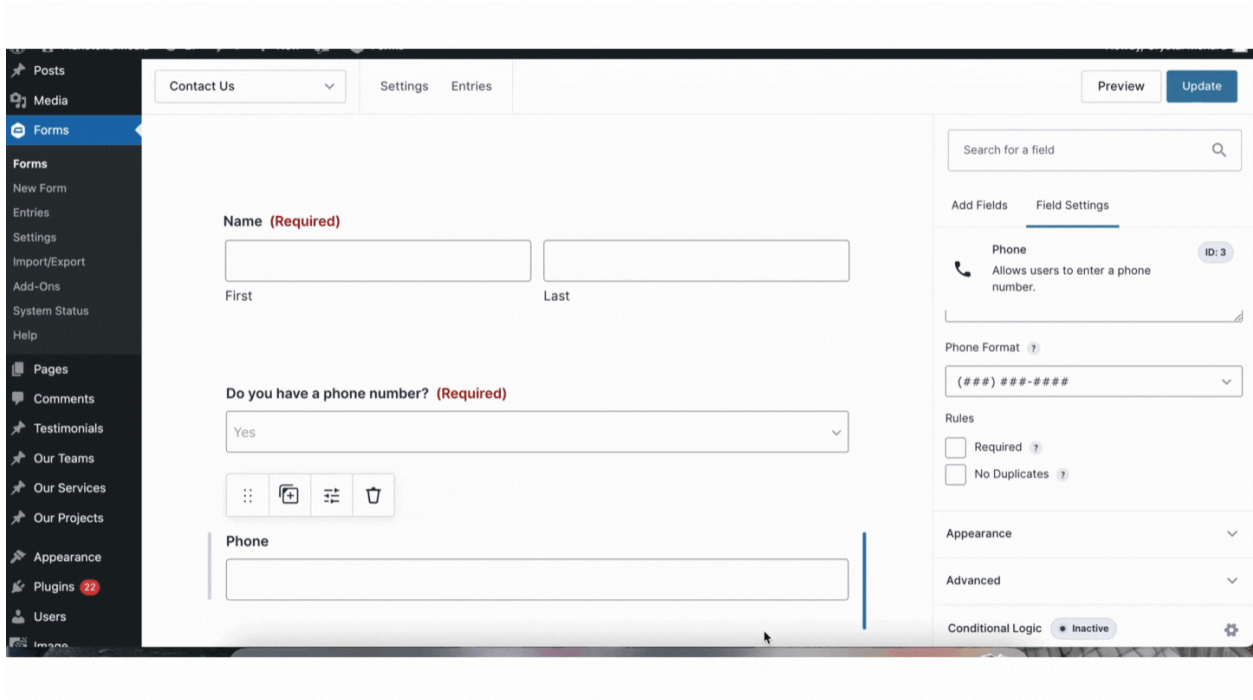
The second icon is the Duplicate tool. You can duplicate the current field.

The third icon is the Settings tool. You can view the Settings tab by clicking on this icon.

The last icon is the Trash tool. If you no longer want the field click on the trash icon and it will be removed from the form.

### Conditional Logic

You can use conditional logic to show fields based on the answer to a previous question. For instance, use this on Radio Buttons to make content appear only after certain selections are made.



## Form Settings

1. Click on the Forms tab in the Dashboard
2. Click on the title of the form you want to edit then click on Settings, or hover over the title and click on Settings

## Settings

You can change the title and description of the form, title and description placement on form fields, the way the Submit button looks, and whether the form can be saved and resumed later.

1. After making changes to this Settings tab, scroll down and click on Save Settings

## Confirmation

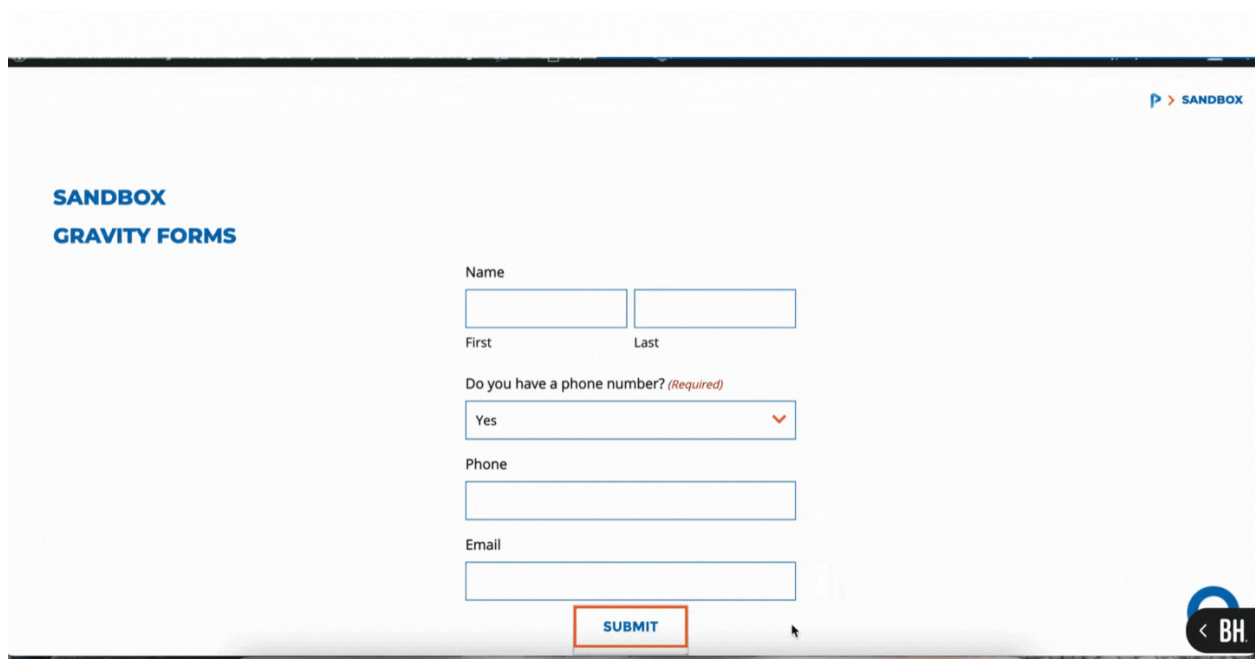
You can change how the confirmation landing page looks or create your own.



## Editing Current Confirmations

1. Click on the Confirmations tab on the left
2. To edit the current confirmation response, click on the title or hover over the title and click on Edit
3. You can change the confirmation text by filling out the Text Box or change the confirmation to take you to a new page on the site, or redirect it to another website entirely.
4. Click on Save Confirmation

Confirmations can be more complex using conditional logic. See the tutorial below for an example.



The screenshot shows a web form titled "GRAVITY FORMS" in a "SANDBOX" environment. The form includes the following fields:

- Name:** Two input boxes labeled "First" and "Last".
- Do you have a phone number? (Required):** A dropdown menu with "Yes" selected.
- Phone:** A single-line text input box.
- Email:** A single-line text input box.

A "SUBMIT" button is located at the bottom of the form. In the top right corner, there is a "SANDBOX" label with a play icon. In the bottom right corner, there is a circular logo with the letters "BH" and a left-pointing arrow.

## Creating new confirmations

1. Click on the Confirmations tab on the left
2. Click on Add New
3. Fill out the Confirmation name, Confirmation Type
4. You can set a conditional confirmation based on the user's responses
5. When done, click on Save Confirmation

## Notifications

You can make changes to who the responses go to based on certain conditions.

## Inserting Forms Into a Page

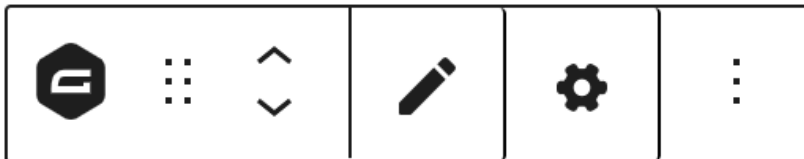
### Embedding a Form

Once a form has been created, you can embed a form into any page in your site.

1. Go to the page you want to embed the form
2. Add a block where you want the form to go
3. Click on the white plus sign with black box and search for Gravity Forms
4. Click on the Gravity Forms icon. The Gravity Forms block will appear in the content editor
5. Click on the down arrow next to Select a Form and choose the form you want to embed. The form will upload.
6. Click Update to save your changes.

### Settings Toolbar

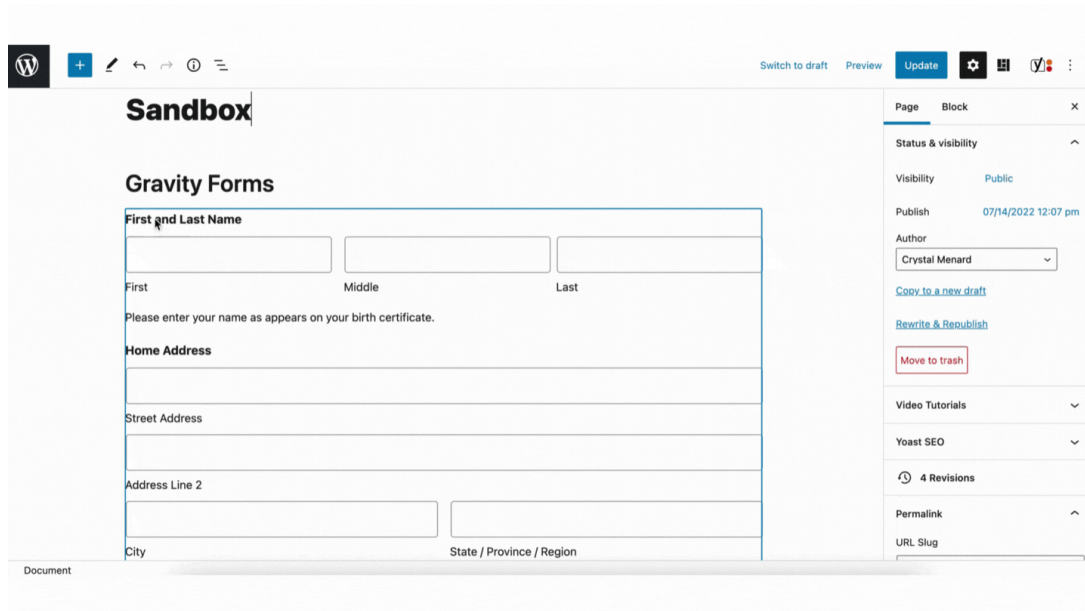
When you click on the Gravity Forms block in the content editor you will see the toolbar right above the block.



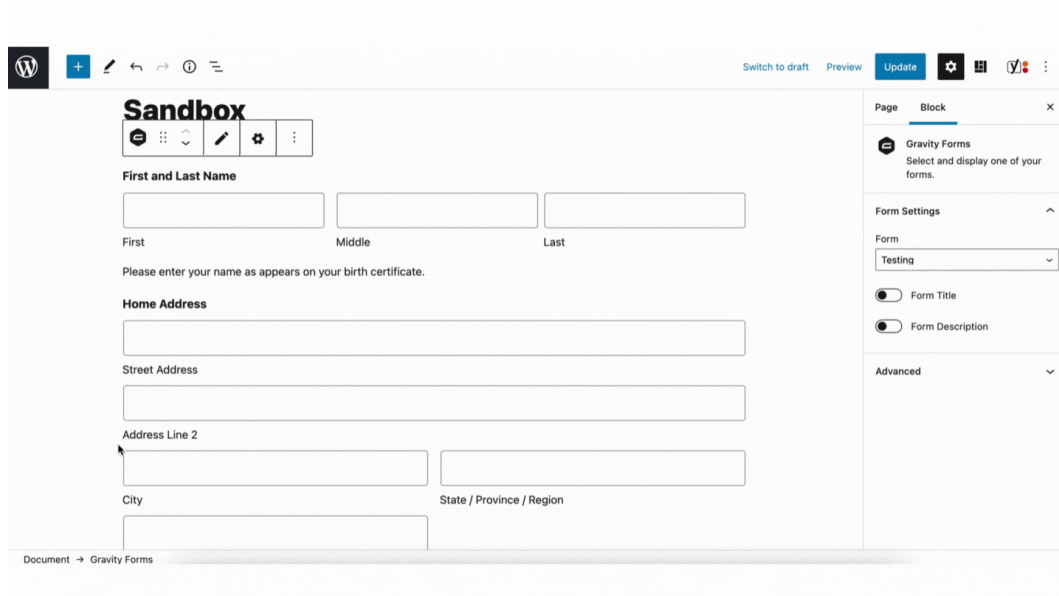
The first icon allows you to insert the block into a column or group block.



The second icon is the drag tool. It allows you to drag the block to other locations.



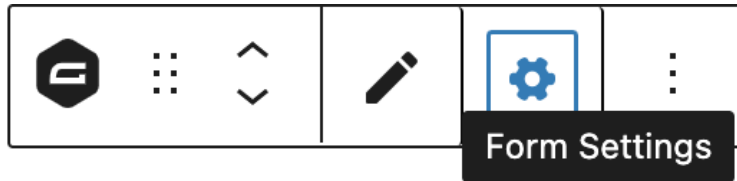
The next icon is the Move tool. It allows you to move the block above or below the top or bottom block, respectively.



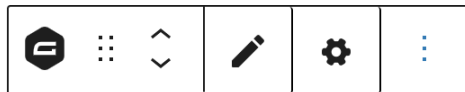
The next icon is the Edit Form tool. When you click on this the Form editor will open up in a new tab.



The next icon is the Form Settings tool. When you click on this the Form settings will open up in a new tab.



The last icon is the universal settings tool for all blocks.



<b>First and Last Name</b>	Hide more settings ⌘⌘,
<input type="text"/>	Copy
First	Duplicate ⌘⌘D
Please enter your name as app	Insert before ⌘⌘T
<b>Home Address</b>	Insert after ⌘⌘Y
<input type="text"/>	Move to
Street Address	Add to Reusable blocks ↺
<input type="text"/>	Group
Address Line 2	Remove block ⌘⌘Z
<input type="text"/>	

## Advanced Block Settings

In the advanced block settings you can choose to hide the title and description of the form. You can also choose to preview the whole form in the content editor or not.

Page **Block** ×

---

**Form Settings** ^

Form

Testing ▾

Form Title

Form Description

---

**Advanced** ^

Preview

AJAX

Field Values

Tabindex

Form ID: 6

## Link Form

Instead of embedding the form directly into the page you can link it. There are two ways to do this.

Creating a page then embedding

1. Go to Pages in the Dashboard
2. Click on Add New

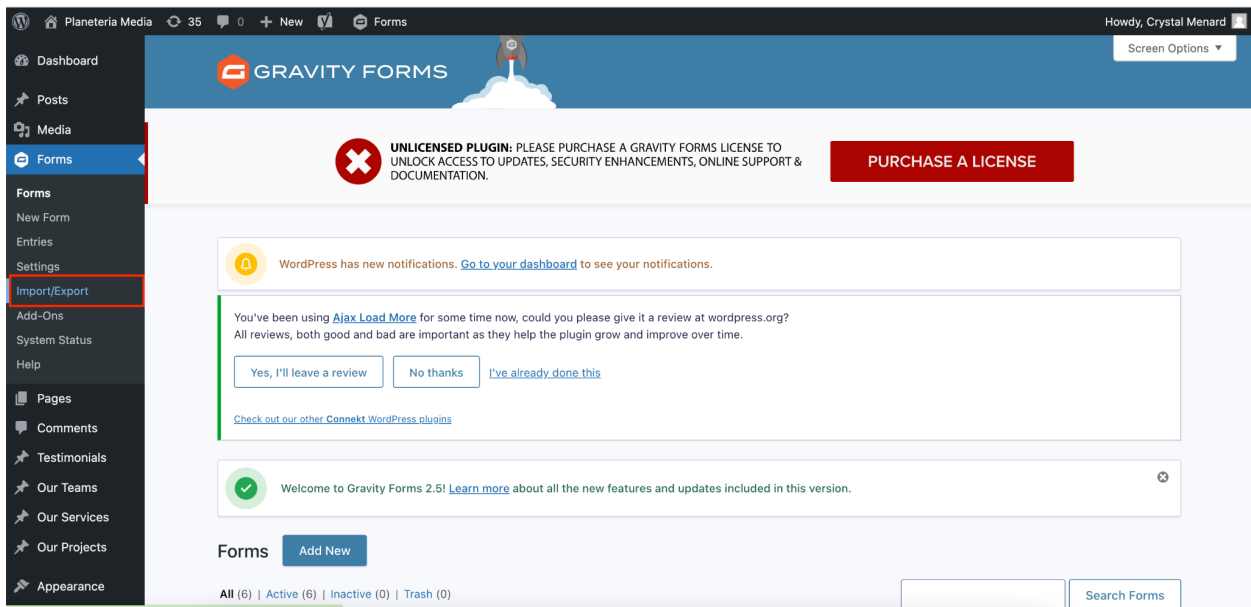
3. Add the title of the Form as the Title of the Page
4. Click on the white plus button then search for Gravity Forms
5. Click on the Gravity Forms icon
6. Select the form you want to embed
7. Click on Publish then Publish again
8. Copy the url of the page then use it to link it on a button or in a paragraph

### Making a New Page in the Form Settings

1. Go to Forms in the Dashboard
2. Click on the title of the Form you want to link
3. Click on the `</>` Embed icon on the top right
4. Under the Create New section, make sure the Page is checked off and type in the Title of the Form
5. Click Create

## Entries

You can view and export entries for your forms.



1. In the Dashboard, click on the Forms tab then click on Import/Export
2. Select a Form from the dropdown menu
3. Select the fields you want to export

4. You can also export entries based on conditional logic or the date range
5. When done, click on Download Export File. A csv file will be downloaded to your local drive.