

ASRA Website Instructions

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Introduction

This documentation attempts to provide adequate instruction on how to carry out common tasks when managing the website. Never hesitate to contact a member of Pixel Designs for help if you've read the documentation and are still unsure of how to do something - we are happy to help any time.

About the site

This website uses the WordPress content management system, along with some premium plugins:

- WooCommerce (provides eCommerce functionality)
- Stripe Payment Gateway for WooCommerce
- WooCommerce Memberships
- WooCommerce Subscriptions

More detailed information on how to use Wordpress, WooCommerce, WooCommerce Memberships and WooCommerce Subscriptions can also be found online.

Pages

Add Pages

1. To get started adding a new page to your WordPress site, find the **Pages** menu in the WordPress Dashboard Navigation menu. Click **Add new**.
2. Add the title of the page, like *About*. Note: If you have pretty permalinks set up, the title of your page will also be the URL slug.
3. Next, add some content. (Note: See section "Edit Pages" for more information on formatting content, adding images, changing page attributes and more.)
4. When you're ready to publish, you can either publish immediately, save as a draft, or schedule the page to be published later.

View Pages

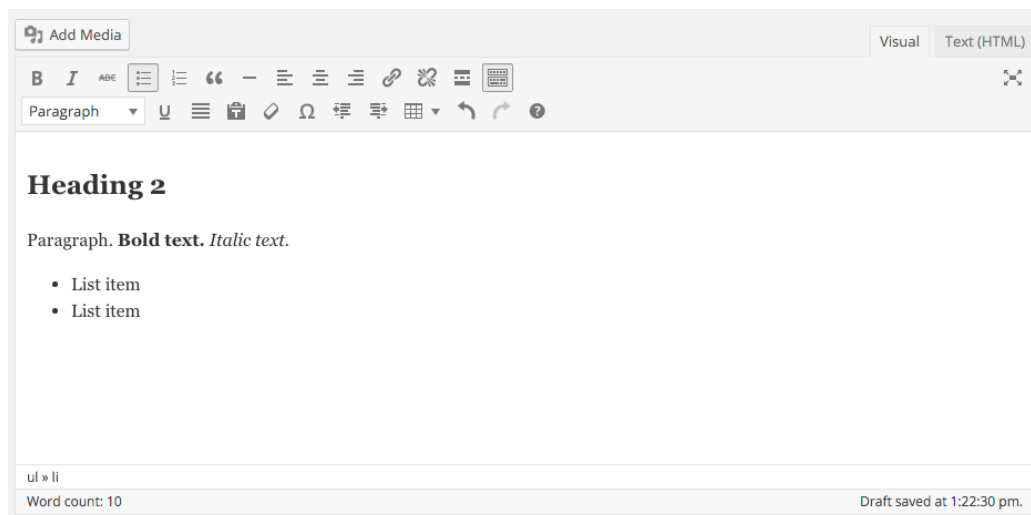
To view a list of pages on the site click on **Pages > All Pages** in the WordPress Dashboard Navigation menu.

Edit Pages

Formatting text

The majority of your formatting options can be found in the **Post Editor Toolbar**. If you've ever used a word processing software such as Microsoft Word, most of these icons should look familiar.

To get started formatting your WordPress pages, visit **Pages > Add New** or **Pages > All Pages** and select the post you'd like to edit.



The formatting icons included in the WordPress post editor include:

- In the first row of the toolbar, we have options to **bold**, **italicize** or **strikethrough** text. To bold text, just select the text you'd like to format and click the bold button. You'll see this text has been bolded.
- The next two icons are for **bulleted** and **numbered lists**. If you'd like to add a list to a post, just select the text, then click that icon.
- The **quotation mark icon** is the block quote feature. This will add an indentation and special style to your selected text.
- Next are **alignment options**. You can choose to align left, center or align right.

- Next are the **insert/edit link** and **remove link** buttons. To add a link, select some text and click the **insert link** button, then enter a URL and click **Add link**. To remove a link, click on a link and then click the **remove link** button.
- The next icon is the insert more tag. This is for blog posts and won't have any effect on pages.
- If you'd prefer to write your posts in **distraction free mode**, click this icon. This will take you to full-screen writing mode similar to using a Word processing software. To exit out of this mode, we'll click "exit fullscreen."
- If we click the **Show/hide the kitchen sink**, another line of formatting options will be revealed. Here you add heading styles to your text, underline text, and more.

If you ever get stuck using your formatting icons, you can simply hover over the icon to see the name and function.

Adding images and other media

1. To add an image to your page simply click on the **Add Media** button that is right above the content editor. This will open the Media Library in a modal window. Select an image from the Media Library or click **Upload Files** to add a new image to the Media Library.
2. Once you've selected an image you can select the alignment, size, or add a caption in the **Attachment Details** section in right hand column.
3. It's also a good idea to add **alt text** describing the image. This is helpful for your website visitors who are visually impaired and browse the web with a screen reader, because the screen reader will read the image description to them.
4. Once you've made the desired adjustments click the **Insert into page** button at the bottom right corner of the window.
5. Now that the image is inserted into the content area, you can change the alignment by clicking on the image then selecting the alignment. Edit the caption and other details by clicking on the image then clicking the **Edit (pencil)** icon. You can also drag it to a different paragraph or add a link to it.

Page Attributes

The **Page Attributes** section applies a parent page and template to your new page.

For the **Parent** section, you can arrange your pages into hierarchies. If you would like the current page to be a sub-page of another page, select the parent page here.

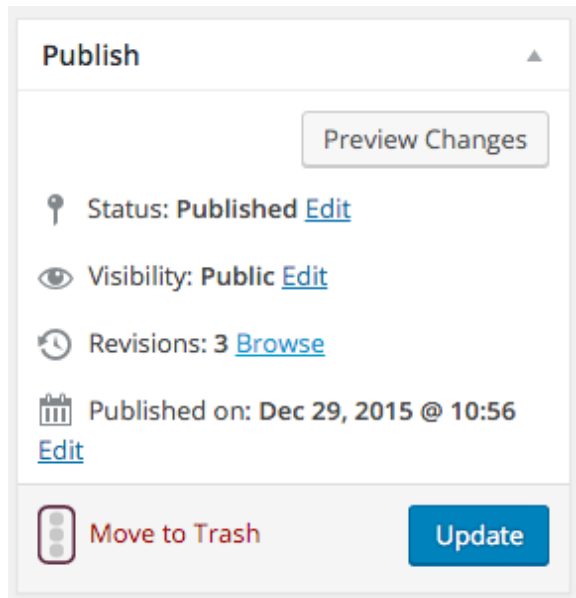
In the **Template** section, you can select a specialized template for your page. Some templates are specially made for use on a specific page but some, like the following, can be used around the site:

- Full-width page (No sidebar): this template is a page with no sidebar
- List Child Pages: this template was created for the Knowledge Base page and simply displays a list of links to its child pages

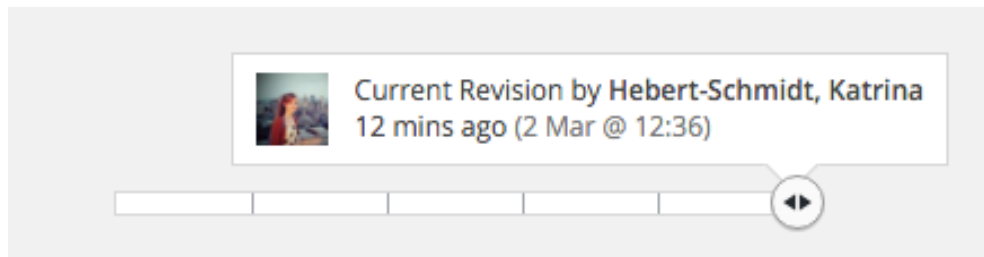
To test out how each of these templates would change the look of the page, select a page template. Now, you can **preview** the changes to this page and decide whether or not to apply this page template to the page. (The preview button is located in the **Publish** box)

Page Revisions

Revisions is an excellent tool that allows you to quickly and easily revert back to a previous version of a page. You will find a link to revisions in the **Publish** box.

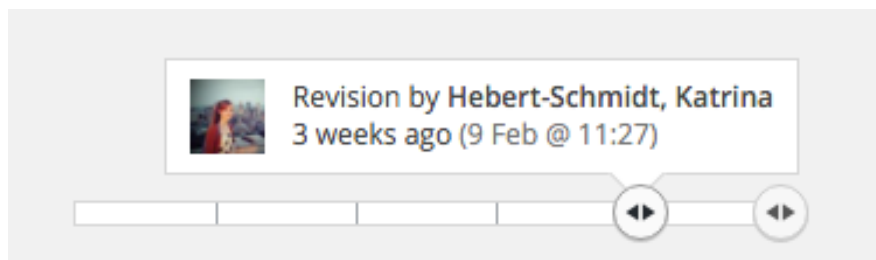


Click the Browse link next to Revisions to browse your revisions.



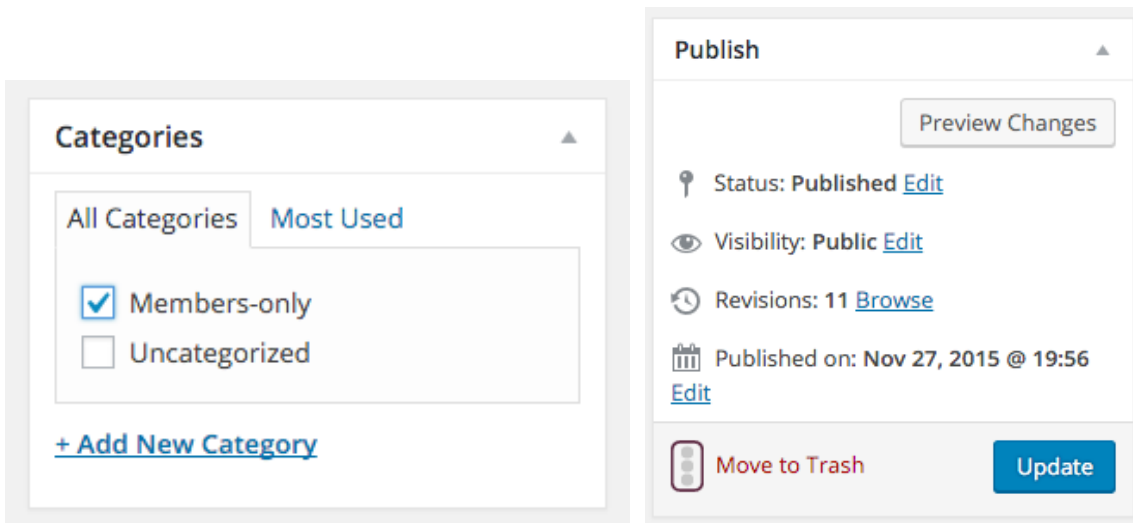
Slide the marker around to select a revision. By default it will compare the revision with the one that came before it. **Content highlighted in green is new content** that didn't exist in the previous revision and **content highlighted in red was removed** compared from the previous revision.

Compare any two revisions: Select two specific revisions to compare by checking the "Compare any two revisions" checkbox. In this mode that you will have two markers that you can slide around:



Members-Only Pages

To set Member-Only restrictions on a page, go to the [Edit](#) screen for that page and check off the *Members-Only* category, then click [Update](#).



(**Note:** if the page is not yet published you may want to click **Save Draft** instead)

How to Add a Photo Gallery

Adding a photo gallery is fairly simple:

1. Create a new page and select Photo Galleries as it's parent page. (Fig. 1)

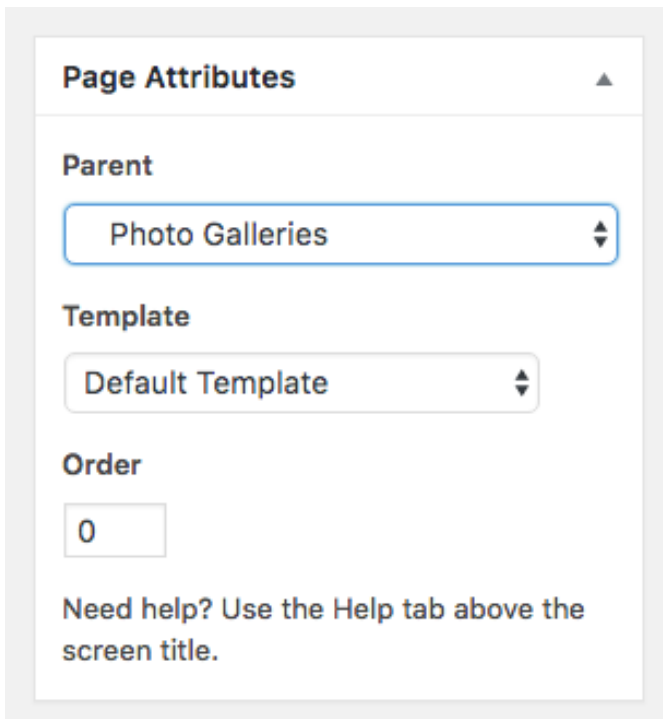


Fig. 1

2. Click on the Add Media button above the content editor, then click on Create Gallery
3. Select the photos you want to add to the gallery by clicking on them. Their thumbnails will appear at the bottom of the window. Click the checkmark next to each image to remove an image.
4. Click "Create new gallery" at the bottom of the window. This will create the Gallery and take you to the Gallery settings.
5. Drag and drop to re-order the images. Add captions to the images by clicking where it says "Caption here..." underneath the image.
6. Click the "Insert gallery" button to add your gallery to the page.

Once you've inserted your gallery, it should look like the screenshot below (Fig. 2). To make changes to the gallery, click once on the gallery then click the edit (pencil) icon.

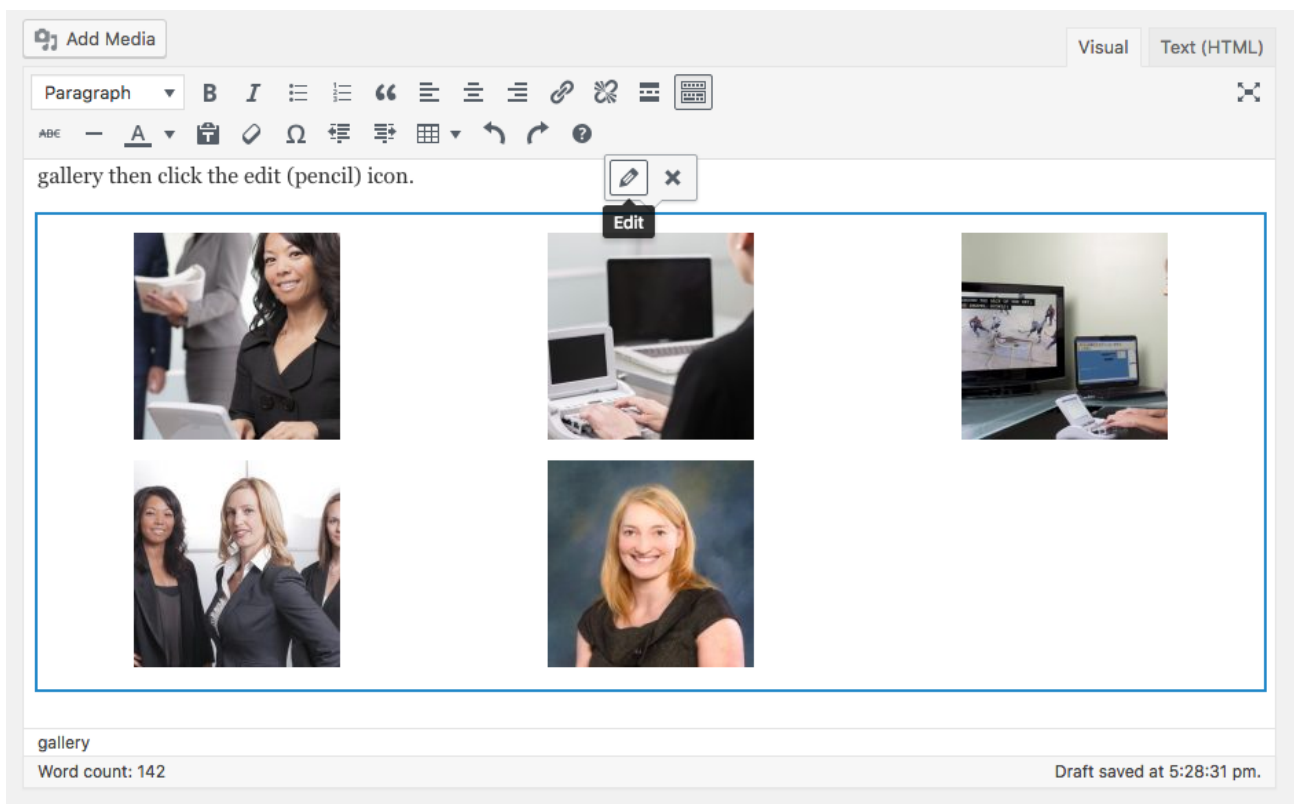
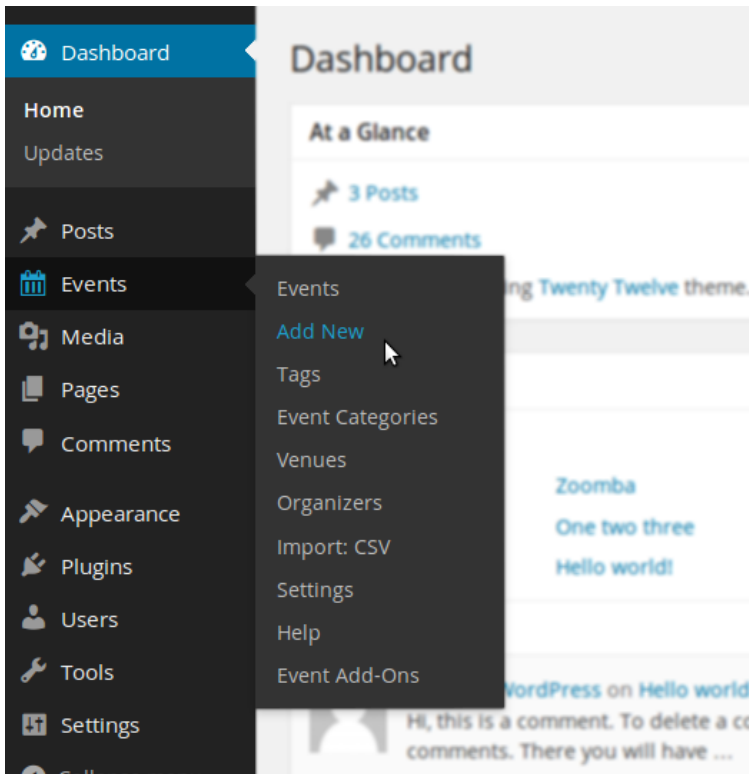


Fig. 2

Events

Add a New Event

To add a new event click on **Events > Add New** from the WordPress dashboard.

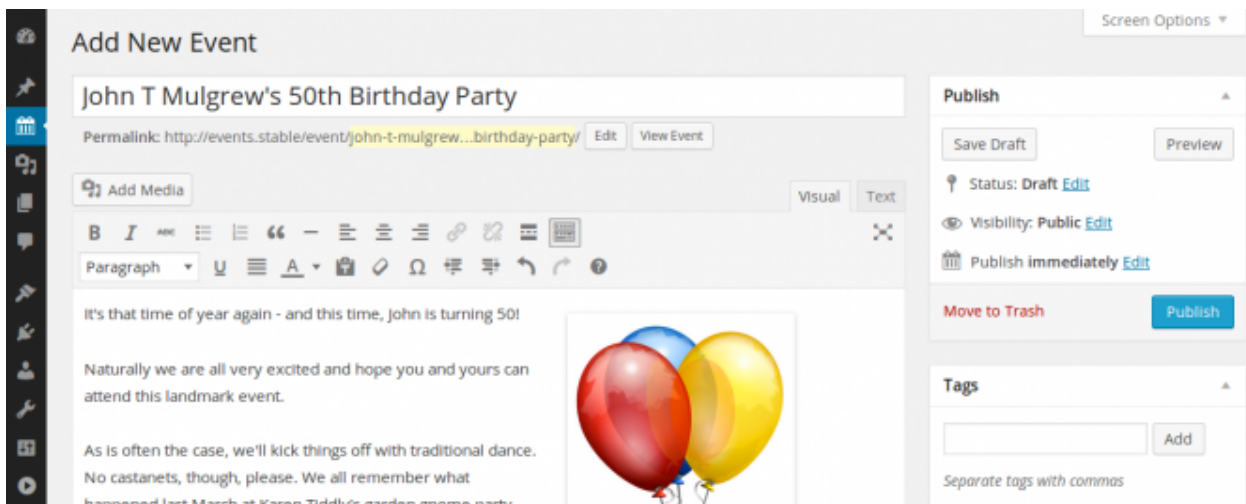


View & Edit Events

To view a list of already created events go to **Events > Events** in the WordPress dashboard. Click on the event name to view and edit an event!

Title & Description

Just as with a page, you can add a title and description to your event. The expected controls for saving it as a draft or publishing it are present, too:



Event Time & Date

Of course, events have specific bits of information associated with them that most pages and posts don't require – start and end dates, for instance, not to mention venues and organizers.

Fields to set all of these things can be found below the description editor, in an area called the events meta box:

The Events Calendar

EVENT TIME & DATE

All Day Event:

Start Date & Time: @

End Date & Time: @

EVENT LOCATION DETAILS

Use Saved Venue:

Venue Name:

Address:

Let's look at each of the settings in this area in turn. First, the date and time fields.

- The **All Day Event** checkbox is useful when the event is taking place on a particular date (or dates) – but you don't really know when, or else feel that it is good enough to say it takes place "all day" without being more specific
- The **Start Date & Time** is fairly self-explanatory – this is simply when the event starts. If you already checked the All Day Event box you will not be able to specify a time – otherwise, of course, you can also pick a time at which the event will start
- Generally what starts must finish, but that isn't always the case. Use the **End Date & Time** fields if there is a defined end time for the event – if there isn't you can leave the end date and time identical to the start date and time: doing so effectively indicates an open-ended event

Venues & Organizers

Next, let's move on to the **Event Location Details**:

EVENT LOCATION DETAILS

Use Saved Venue:

Venue Name:

Address:

City:

Country:

State or Province:

Postal Code:

Phone:

Website:

Show Google Map:

Show Google Maps Link:

The first thing you'll see in this section is the **Use New Venue** dropdown. This allows you to select a venue that you created for some previous event — it can save you some time when creating events in the future by re-using existing venue details. (Note: If you prefer not to specify a venue, simply move on to the next section.)

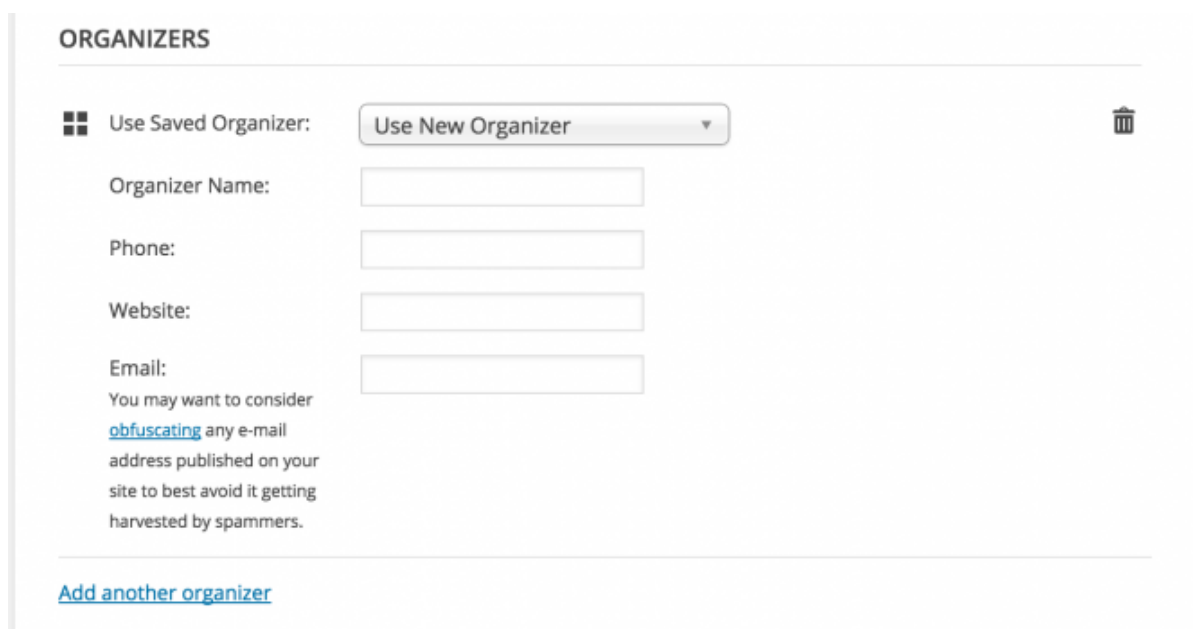
Venue details

Provide a venue name, optional address details and – if you like – a contact phone number and website. The last two checkboxes control whether a map should be shown to visitors and if a link to a map should be displayed.


If your event is happening a little off the beaten path and there isn't a mappable address, you can use latitude and longitude instead. To do this, leave the venue without an address. After you've created the event, go to **Events > Venues** and edit the Venue in question. You'll see an option there for adding coordinates.

Once you're happy with the event's venue you can move on to the next section: the organizer details.

Rather like the venue details, you can select any pre-existing organizer details that you have already entered. Also – just as with the venue details – this area is completely optional.



ORGANIZERS

Use Saved Organizer: 

Organizer Name:

Phone:

Website:

Email:

You may want to consider [obfuscating](#) any e-mail address published on your site to best avoid it getting harvested by spammers.

[Add another organizer](#)

You do not

need

to provide organizer details and, if you do, you need only provide as much information as you want to. You can add multiple organizers to an event, but keep in mind that if you opt for multiple organizers, any organizer information (like the phone number or email) will not show on the frontend — only the organizer names will be listed.

Event website

The next section lets you provide an event website:

EVENT WEBSITE

URL:

This is particularly useful if you are showcasing events organized by external organizations and they have a dedicated event website.

Event Categories

Categorize events using the **Event Categories** section. Simply check or uncheck the category to add or remove it. (Note: these are not the same set of categories that are used for pages.)

Event Categories ▲

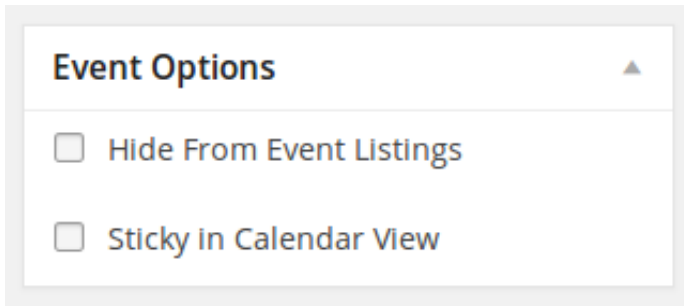
All Event Categories Most Used

- National Holidays
- Banquets
- Convention
- Aretha Franklin Revivalists
- Meetup
- Shindigs & Hoedowns
- Readings

[+ Add New Event Category](#)

Event Options

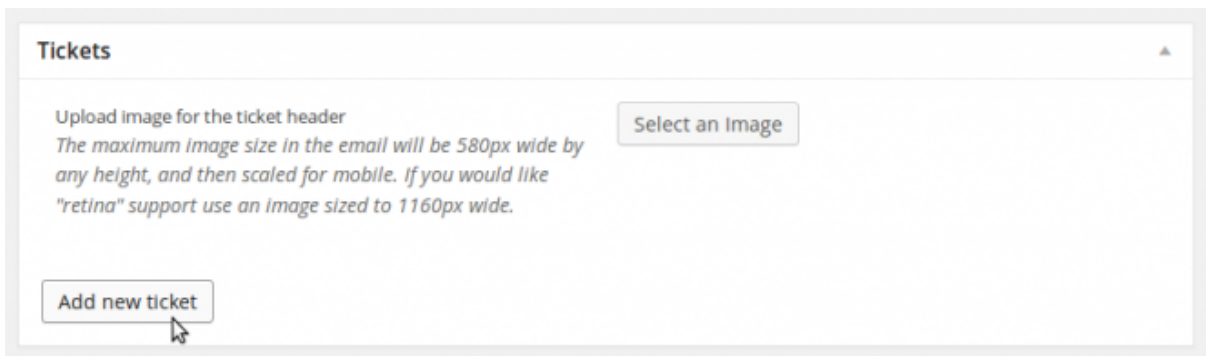
Usually found close to the tag and event category meta boxes, you can find the Event Options:



- Sometimes you want to be able to link to an event post (by email, or from a page) but would prefer it isn't included in the main event views – checking the **Hide from Event Listings** box accomplishes just that
- You might also happen to have a whole load of events taking place on the same day ... naturally that can cause some problems in month view – and so, at least by default, no more than 3 events per day are shown in that view – selecting **Sticky in Calendar View** helps you to ensure that this event is one of the ones that do show

Add Event Tickets

Below the main content box you will find the **Tickets** meta box:



Simply click on the **Add New Ticket** button and you will be presented with some additional options:

Tickets ▲

Upload image for the ticket header
The maximum image size in the email will be 580px wide by any height, and then scaled for mobile. If you would like "retina" support use an image sized to 1160px wide.

Add new ticket

Sell using: Easy Digital Downloads WPEC WooCommerce RSVP

Ticket Name:

Ticket Description:

Start sale:

End sale:

When will ticket sales occur? If you don't set a start/end date for sales, tickets will be available from now until the event ends.

Price: *(0 or empty for free tickets)*

Stock: *(Total available # of this ticket type. Once they're gone, ticket type is sold out.)*

SKU: *(A unique identifying code for each ticket type you're selling)*

To make a purchasable ticket, you will want to select **Sell using WooCommerce**. If you want to collect attendee RSVPs without selling tickets, you can select RSVP instead.

- **Ticket name** lets you set a unique name for the ticket type – which might be something like Member Ticket, Non-Member Ticket, Guest Ticket, etc. Consider adding the event name to the ticket name, so that you can easily differentiate the tickets later on.
- **Ticket description** is optional, but it's a good space to add any information customers might be interested in, such as "Social activities only" for the Guest Ticket.
- **Price** controls the price of each ticket. If the tickets are not going to be sold – but rather you are going to give them away for free – you can leave this field blank or set it to 0.
- **Start sale** dictates when the tickets are available for sale. You don't need to set this field – by default sales will start when you publish the event or ticket.
- **End sale** does the reverse – you can set this to a date after which the tickets should no longer be available for customers to buy. As with the start sale field, setting this is optional for events and the default is to stop sales when the event itself starts.
- **Stock** is the number of tickets that are available: if you leave this blank it is assumed that there is no limit and customers can buy as many as they would like. If you have a limited number of spots for your event, you'll want to make sure to set this accordingly.
- **SKU** lets you set a unique code to help identify the tickets. This is another optional field and is of most use to merchants with an existing stock-keeping unit system.

As soon as you're ready, simply click on **Save This Ticket** and you're done ... and never fear, if you make a mistake you can easily correct it by clicking on the edit link later on:

WOOCOMMERCE [Event sales report](#) | [Attendees](#)

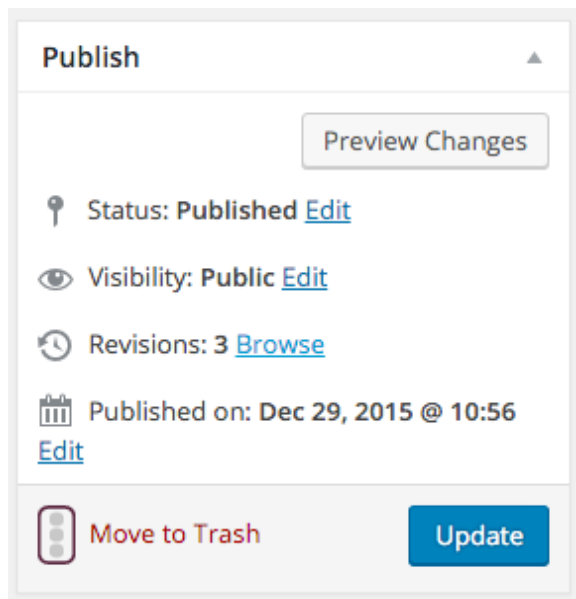
[ASRA Spring Convention 2016](#) \$75.00 Sold 1
[Guest Ticket](#)

[Edit](#) | [Delete](#) | [Edit in WooCommerce](#)
| [Report](#)

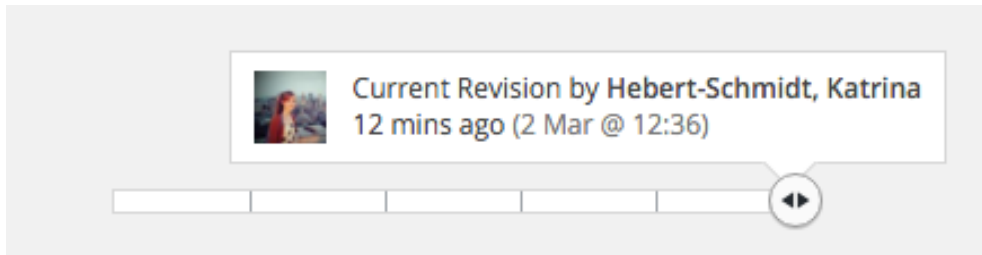
Event Revisions

Revisions for events work the same way as they do with pages. Please note that revisions only restore the main content area **it will not restore** the extra data such as the event date, location, tickets, etc.

A link to the revisions can be found in the **Publish** box, just like with Pages.

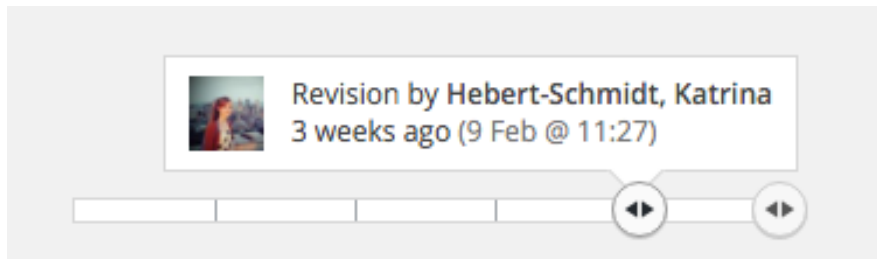


Click the Browse link next to Revisions to browse your revisions.



Slide the marker around to select a revision. By default it will compare the revision with the one that came before it. **Content highlighted in green is new content** that didn't exist in the previous revision and **content highlighted in red was removed** compared from the previous revision.

Compare any two revisions: Select two specific revisions to compare by checking the "Compare any two revisions" checkbox. In this mode that you will have two markers that you can slide around:



Members-Only Tickets

To set up members-only tickets, you will need to go to a different page so before you get started, click one of the **Save Draft / Publish / Update** buttons in the Publish box to save any changes you've made to your event.

Once you're ready, scroll down to your tickets. Hover on a ticket and click **Edit in WooCommerce:**

[2016 ASRA Fall Conference Test](#) \$250.00

[Ticket](#)

[Edit](#) | [Delete](#) | [View](#) | [Edit in](#)
[WooCommerce](#) | [Report](#)

Add new ticket

This will take you to the **Edit Product** screen. Scroll down until you see the **Memberships** box:

Memberships

- Restrict Content
- Grant Access
- Discounts

Disable restrictions *Check this box if you want to force this product to be public regardless of any restriction rules that may apply now or in the future.*

<input type="checkbox"/>	Plan	Only Members Can	Accessible ?
	This product can be viewed & purchased by all customers. Add a rule to restrict viewing and/or purchasing to members.		
	Add New Rule		

Need to add or edit a plan? [Manage Membership Plans](#)

Use custom message *Check this box if you want to customize the viewing restricted message for this product.*

Use custom message *Check this box if you want to customize the purchasing restricted message for this product.*

Stay in the *Restrict Content* tab, and click on the **Add New Rule** button.

Next, you'll want to select the membership plan, and then change it from Only Members Can **view** to Only Members Can **purchase**:

<input type="checkbox"/>	Plan	Only Members Can	Accessible ?
<input type="checkbox"/>	Certified Shorthand Reporter	view ✓ purchase	<input checked="" type="radio"/> immediately <input type="radio"/> specify a time <input type="checkbox"/> Start after trial
Add New Rule		Delete Selected	

Leave the Accessible setting on “**immediately**”.

Note that you will need to add a rule for each membership type that should have access to this ticket. Tip: *Participating Memberships do not need access* because all Participating Members already have a Certified Shorthand Reporter membership

If you would like to delete a rule, **click the checkbox** next to that rule, then click on the **Delete Selected** button.

Once you’re done scroll back up to the **Publish** box and click **Update**:

Publish ▲

[Preview Changes](#)

📌 Status: **Published** [Edit](#)

👁 Visibility: **Public** [Edit](#)

📅 Published on: **Mar 1, 2016 @ 17:27**
[Edit](#)

Catalogue visibility: **Hidden** [Edit](#)

📄 [Copy to a new draft](#)

🗑 [Move to Trash](#) [Update](#)

You can use your browser back button to go back to the Event.

Managing Orders and Attendees

The Order Process

Generally speaking, the process is as follows:

- A customer **purchases** one or more tickets
- An order or purchase **record** is created
- You **review the order** and, if you're happy with it, you **mark the order Complete**
- When the order is marked completed **tickets are generated and emailed out** to the customer
- At the same time, ticket details are added to the **attendee list** for the event

If you are using RSVP mode, you will not have any order confirmations- only attendee reports from your RSVPs.

Creation and completion of orders

The process begins with the customer purchasing one or more tickets. Customers add any number of tickets to the cart and continue on to pay for their order. This will create a new order in **WooCommerce > Orders**.

Next, YOU must **review each new order** in **WooCommerce > Orders** and mark it complete if everything looks acceptable. One exception might be if you run out of tickets: rather than *completing* the order you may want to *cancel* it and issue a refund to that customer, along with a note to the customer explaining what happened.

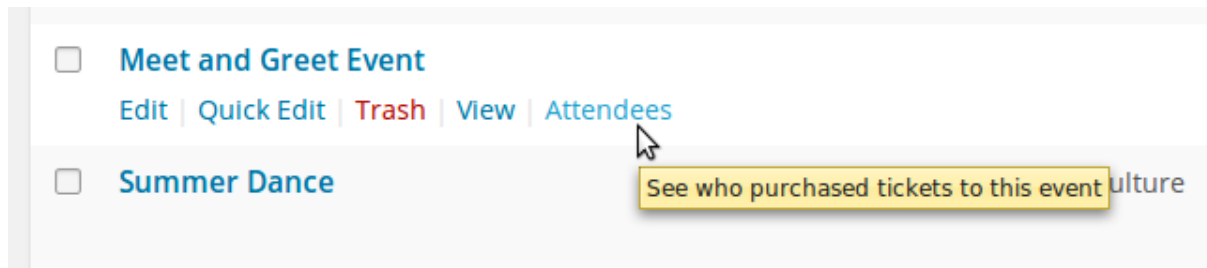
Tickets will not be dispatched as soon as the customer has paid - you must first mark the order complete.

Once the order is marked complete, the ticket(s) will be generated and emailed out to the customer and those tickets will be added to the event's attendee list.

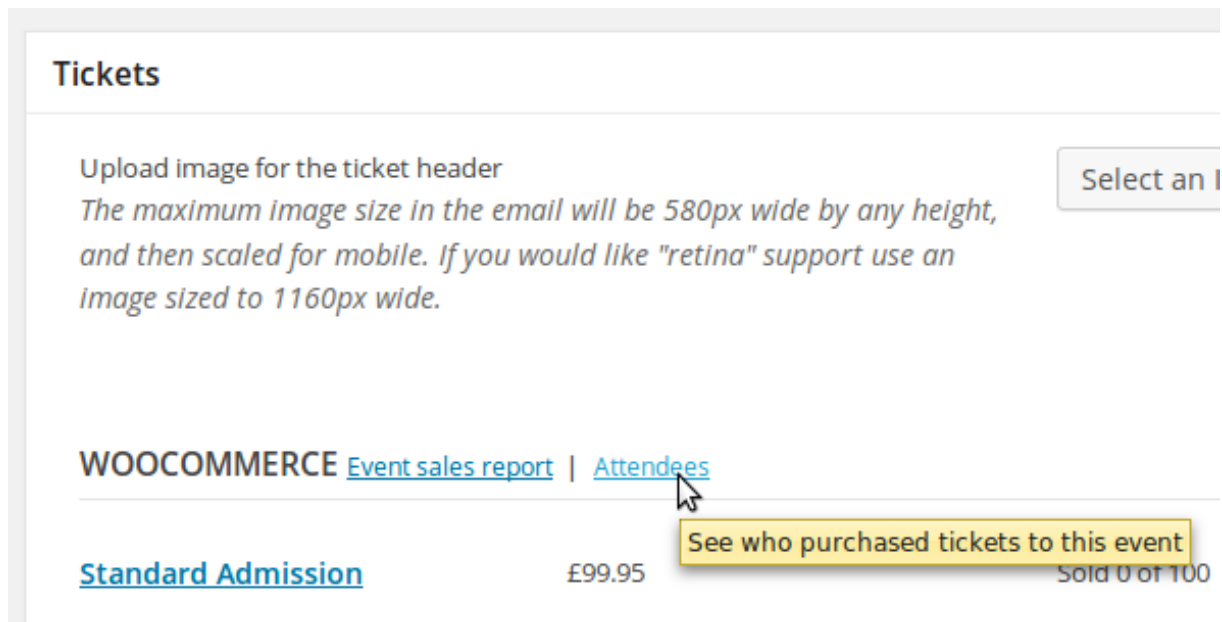
The exception to this is if you are using the free RSVP ticket type; there is no order status or payment collection-related processes for the RSVP ticket type.

Attendee list

The attendee list is a consolidated list of all the ticket purchases that have been made and completed for a given event. There are a couple of ways in which you can navigate to the screen. The first is to hover over an event, page, or post in your WordPress admin and click on the Attendees link:



The second is from within the Tickets meta box in the content editor:



Either link will take you to a new screen where you can see a list of attendees/issued tickets, including the purchaser name, email, ticket ID and unique ticket security code:

Event Summary

Event Details
 Start Date / Time: December 28, 2014 @ 9:15 pm
 End Date / Time: December 28, 2014 @ 11:15 pm

Ticket Sales
 Standard Admission: Sold 3 of 100

Tickets sold: 3
Checked in: 0

Bulk Actions Filter by ticket #, order # or security code:

<input type="checkbox"/>	Order #	Order Status	Purchaser name	Purchaser email	Ticket type	Ticket #	Security Code	Check in
<input type="checkbox"/>	116	Completed	Pete Dobson	pete@hotmail.com	Standard Admission	120	00b41c90f	<input type="button" value="Check in"/>
<input type="checkbox"/>	116	Completed	Pete Dobson	pete@hotmail.com	Standard Admission	119	1c974319f8	<input type="button" value="Check in"/>
<input type="checkbox"/>	117	Completed	Margaret Wretch	northwest@hotmail.com	Standard Admission	118	802766e79a	<input type="button" value="Check in"/>

Bulk Actions

There are lots of interesting facets to this screen – but first it's worth stopping for a moment to consider the order flow.

Incomplete orders and unissued tickets

What if tickets have been purchased but the orders have not yet been completed? Well, that would mean the tickets have not been issued and so they won't display on the attendee screen.

The summary of tickets sold will actually reflect this with a breakdown of how many tickets are held in finalized orders and how many are held in orders needing further attention:

Tickets sold: 5

Finalized: 3 Awaiting review: 2

Checked in: 0

Navigating the attendee screen

Perhaps the next most important thing to pay attention to is the check in button: the idea here is that when attendees arrive at your event you can confirm their ticket is valid...and that a duplicate with the same ID has not already been checked in before admitting the person.

QR Code Check-ins


Tickets will have a QR Code on them. You can use these codes for in-person check-ins at your event; whether the ticket is being shown on a smartphone screen, or is printed out on paper, once scanned it will check-in that attendee. Here's a screenshot of a ticket with a scannable QR Code:

Black Tie Dinner & Ballroom Dance

January 15, 2016 @ 6:00 pm

TICKET #	TICKET TYPE	PURCHASER	SECURITY CODE
1137	Club Members	Bob Snell	68de1a9d30

VENUE Winchester Mystery House 525 S Winchester Blvd San Jose http://localhost/master-qa	EVENT MANAGER F. Scott Fitzgerald
--	---

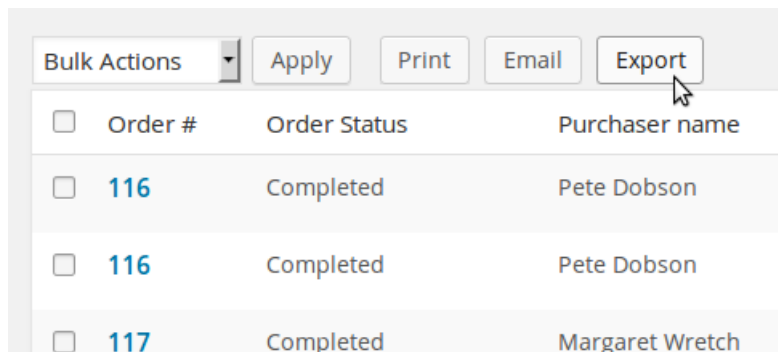


Check in for this event

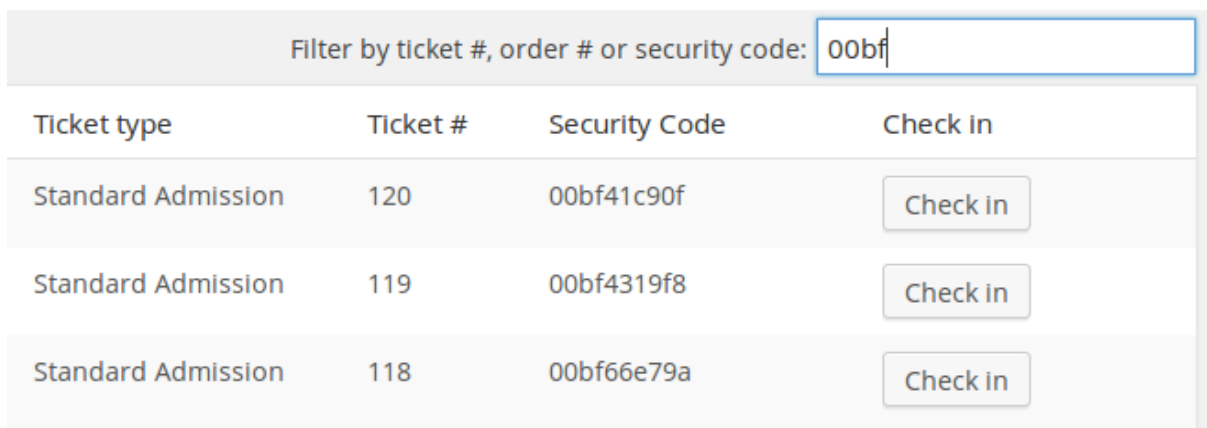
Scan this QR code at the event to check in.

Exporting Attendee Data

Another key feature is that you can extract all of the attendee data by one of three different means: you can print to paper, email it, or export it as CSV data (which makes it easy to import into a spreadsheet application).

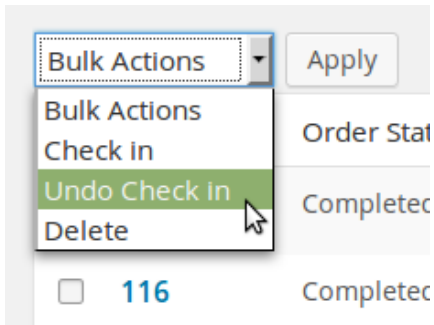


If you have lots of attendees you'll also love the filter options:



Simply type in a ticket number (or just the start of one) and it will show you only those tickets. It also allows you to filter by order number and security code.

The last thing we're going to look at are the available bulk actions. Sometimes you want to check in lots of tickets all at once – or indeed you might want to reverse that operation and undo the check in for one or more attendees, or even delete entries altogether. By checking the relevant rows and choosing a bulk action you can do just that:



Just hit **Apply** and it is done

RSVP Attendees

If your event uses the RSVP ticket type instead of having tickets for sale, then viewing and managing RSVP attendees is all **exactly the same** as the above process, but there is no “order status” on RSVP tickets.

Here's a screenshot of Attendees who have RSVPed to an event:

Attendees

RSVP Demo
<http://tribe-products.dev/event/rsvp-demo/>

Event Details
 Start Date / Time: December 17, 2015 @ 8:00 am
 End Date / Time: December 17, 2015 @ 5:00 pm
 Venue: International Space Station
 Address: Intl

Sales by Ticket
 Two Guests: Sold 4 of 246
 One Guest: Sold 7 of 493

Total Sold: 11
 Finalized: 11
 Awaiting review: 0
 Checked in: 0

Order #	Order Status	Purchaser name	Purchaser email	Ticket type	Ticket #	Security Code	Check in
<input type="checkbox"/> 802		Billy White Feather	george@tri.be	One Guest	802	841cefff9a	<input type="button" value="Check in"/>
<input type="checkbox"/> 801		Billy White Feather	george@tri.be	Two Guests	801	f12a2942fe	<input type="button" value="Check in"/>
<input type="checkbox"/> 800		Billy White Feather	george@tri.be	One Guest	800	9cfa737c8c	<input type="button" value="Check in"/>
<input type="checkbox"/> 799		Billy White Feather	george@tri.be	One Guest	799	b838aa2a76	<input type="button" value="Check in"/>
<input type="checkbox"/> 798		Billy White Feather	george@tri.be	Two Guests	798	b8d2b31cb2	<input type="button" value="Check in"/>
<input type="checkbox"/> 797		Billy White Feather	george@tri.be	Two Guests	797	870ac12daa	<input type="button" value="Check in"/>
<input type="checkbox"/> 796		Billy White Feather	bwhitefeather@gmail.com	One Guest	796	ad57dfe733	<input type="button" value="Check in"/>

Add Products

To add a new product go to **Products > Add Product**

Viewing and Editing Products

To view a list of products go to **Products > Products** in the Wordpress dashboard. Click on the product name to go to the **Edit Product** screen.

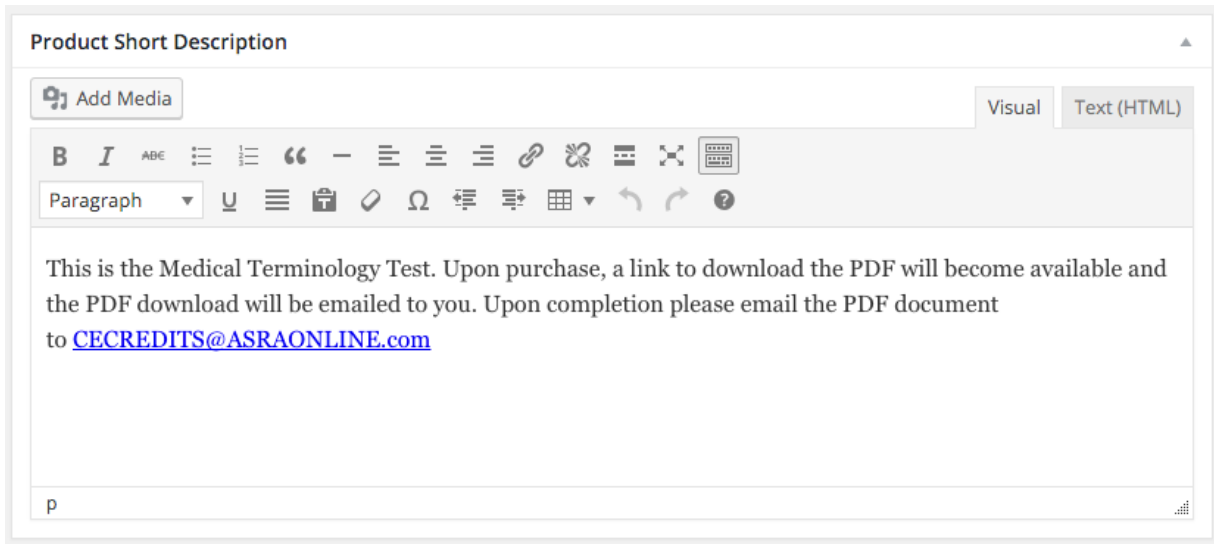
Title and Description

Each product has a place to enter a title, and a description:

The screenshot shows the 'Edit Product' interface in WordPress. At the top, there's a title field with the text 'Medical Terminology- Article Test 23'. Below the title is a 'Permalink' field showing a URL: 'https://asraonline.com/shop/medical-terminol...-article-test-23/'. There are 'Add Media' and 'Add Product' buttons. A rich text editor toolbar is visible with options for 'Visual' and 'Text (HTML)'. The description area contains the text 'Medical Terminology Test - downloadable PDF.'. At the bottom, it shows 'Word count: 5' and 'Last edited by on January 29, 2016 at 1:08 pm'.

Important note: Although this content editor appears large and important, the description you enter here will actually end up tucked away at the bottom of the product page when you're viewing the product on the website. I recommend using this content area for extra technical details about the product, or you just leaving it blank!

Scroll down a bit more to find the **Product Short Description** section. This is where you will want to enter the main description for the item, as this description will be featured prominently below the title when viewing the product page.



Product Data

General

Scroll up or down and find the **Product Data** section:

The screenshot shows the 'Product Data' meta box for a 'Simple product'. At the top, 'Virtual' and 'Downloadable' checkboxes are checked. The left sidebar has tabs for 'General', 'Inventory', 'Linked Products', 'Attributes', and 'Advanced'. The 'Advanced' tab is selected, revealing the 'Downloadable Files' section. This section contains a table with columns for 'Name' and 'File URL'. One file is listed: 'Test 23' with the URL 'http://asraonline.com/'. Below the table is an 'Add File' button. Further down, there are three settings: 'Download Limit' set to 'Unlimited', 'Download Expiry' set to 'Never', and 'Download Type' set to 'Standard Product'. Each setting has a help icon and a descriptive tooltip.

This is where you will configure the product and enter vital data like pricing. Generally, you will want to leave the product type as **Simple product**.

Enter the **price** in the Regular Price field. If you would like to set a **sale price**, enter a sale price. Clicking *Schedule* will allow you to schedule a start and end time for the sale price ahead of time.

Virtual/Downloadable Products

If you are adding a downloadable product such as an Article Test, you should check both the **Virtual** and **Downloadable** checkboxes. The “**Virtual**” setting tells WooCommerce that this is not a physical product and therefore does not require any shipping. You can see in the screenshot above that the “**Downloadable**” setting will enable you to add Downloadable files and other related options to the item.

Click the **Add File** button to add a downloadable file to this product. You will want to set the name and then click choose file to select a file from the Media Library, or upload a file. Once you've uploaded or selected the file in the Media Library click *Insert file URL* to add it.

Set a Download Limit and Download Expiry if desired, and change the Download Type only if the file is an audio file (Music) or an application (Application/Software).

For more information about Digital/Downloadable product handling visit: <https://docs.woothemes.com/document/digitaldownloadable-product-handling/>

Inventory

The Inventory tab allows you to enable stock management for a product and set up a stock quantity. You can also allow backorders, set the stock status, and restrict a product so that it is only sold individually.

For more information about other product types and managing products visit: <https://docs.woothemes.com/document/managing-products/>

Members-Only Products

To set up a members-only product you have multiple ways of approaching it.

1. You can scroll to the Memberships section, which looks exactly the same here as it does when editing tickets or pages and events, and add as many rules as you would like:

Memberships ▲

Restrict Content

Disable restrictions *Check this box if you want to force this product to be public regardless of any restriction rules that may apply now or in the future.*

Grant Access

Plan Only Members Can Accessible ?

This product can be viewed & purchased by all customers. Add a rule to restrict viewing and/or purchasing to members.

Add New Rule

Need to add or edit a plan? [Manage Membership Plans](#)

Use custom message

Check this box if you want to customize the viewing restricted message for this product.

Use custom message

Check this box if you want to customize the purchasing restricted message for this product.

2. You can use **Product Categories**:

Product Categories ▲

All Product Categories
Most Used

Article Tests
 Memberships

[+ Add New Product Category](#)

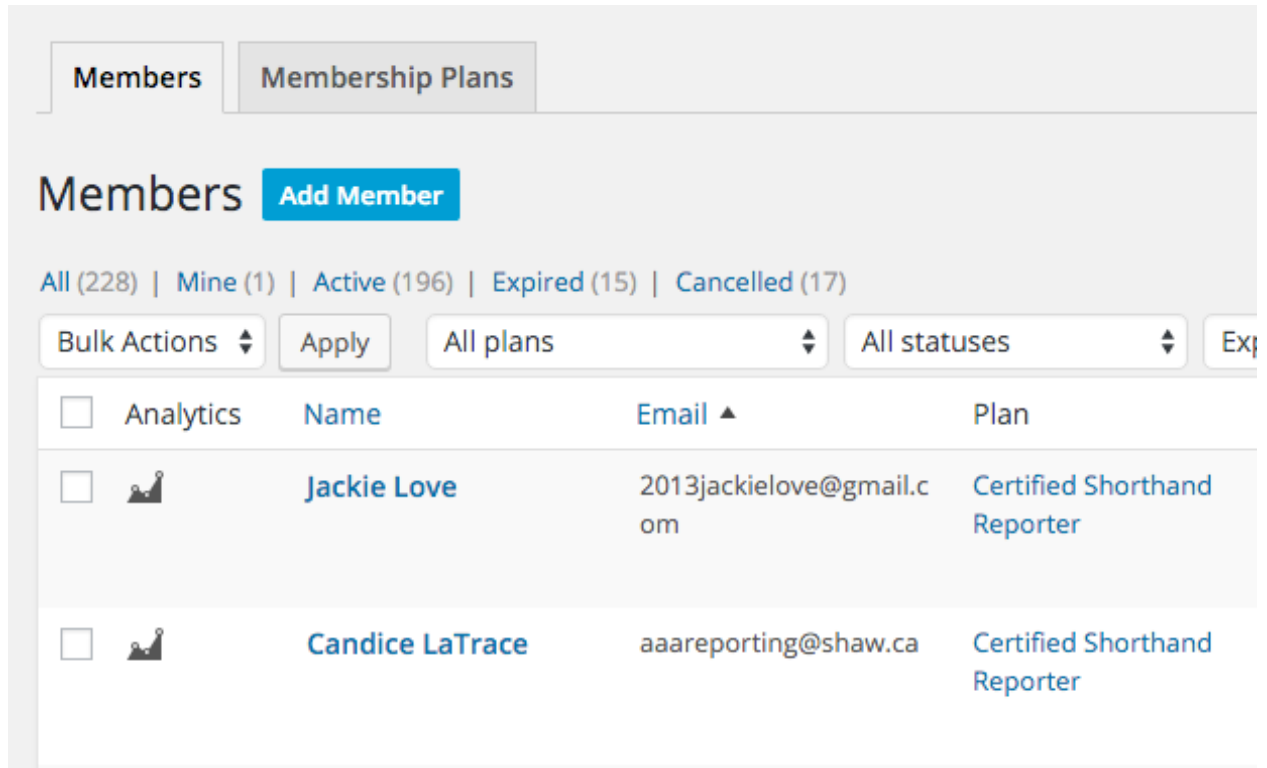
The **Article Tests** category is already set up to be Members-Only, so if you are adding an Article Tests you can simply check off that category!

Set up a new Members-Only category

To set Members-Only restrictions up on another product category, first create your new category by clicking **+Add New Product Category**.

Note: Page categories, product categories and event categories are all **separate** sets of categories.

Next, go **WooCommerce > Memberships** to manage your Membership Plans:



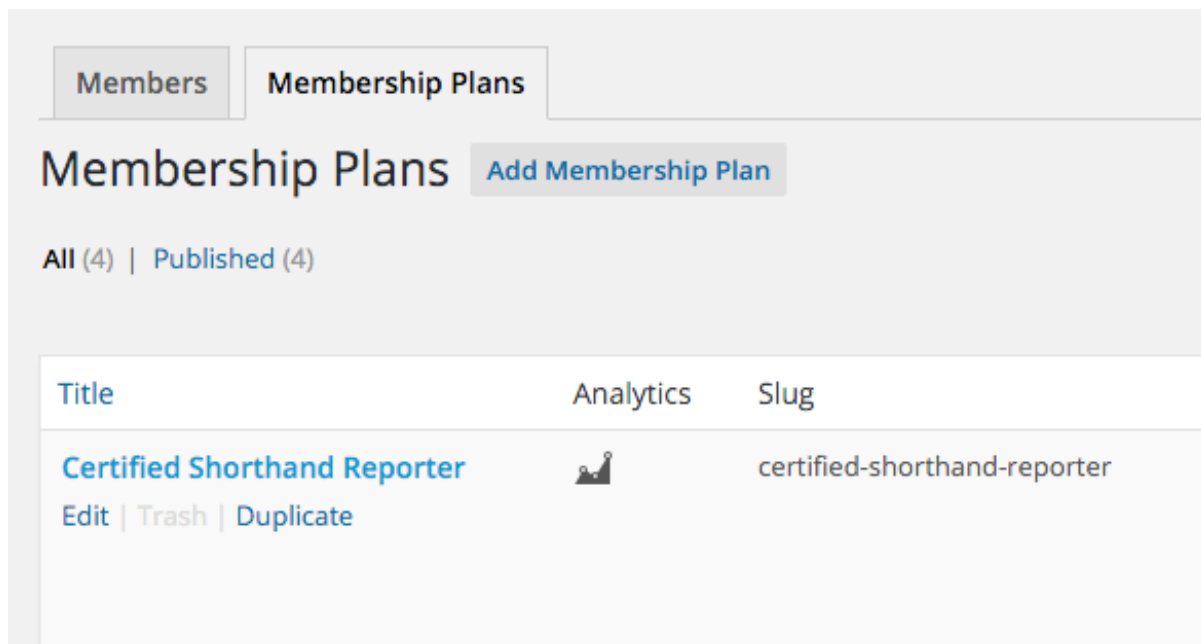
Members [Add Member](#)

All (228) | Mine (1) | Active (196) | Expired (15) | Cancelled (17)

Bulk Actions ▾ Apply All plans ▾ All statuses ▾ Exp

<input type="checkbox"/>	Analytics	Name	Email ▲	Plan
<input type="checkbox"/>		Jackie Love	2013jackielove@gmail.com	Certified Shorthand Reporter
<input type="checkbox"/>		Candice LaTrace	aaareporting@shaw.ca	Certified Shorthand Reporter

Click on the **Membership Plans** tab, then click on a membership type:

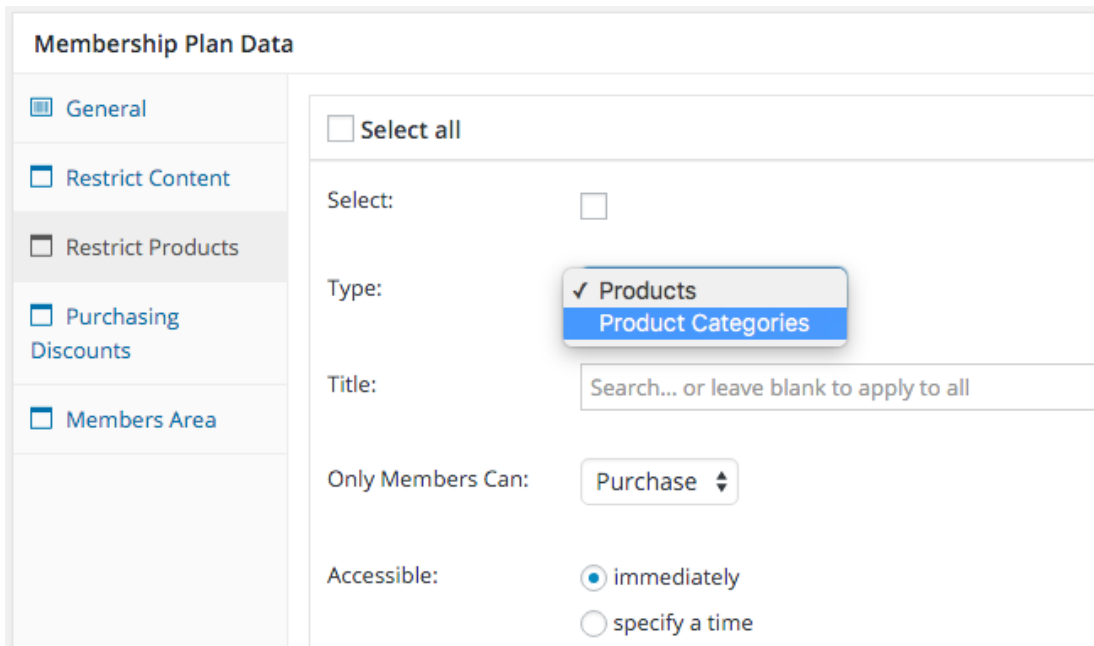


Members **Membership Plans** [Add Membership Plan](#)

All (4) | Published (4)

Title	Analytics	Slug
Certified Shorthand Reporter Edit Trash Duplicate		certified-shorthand-reporter

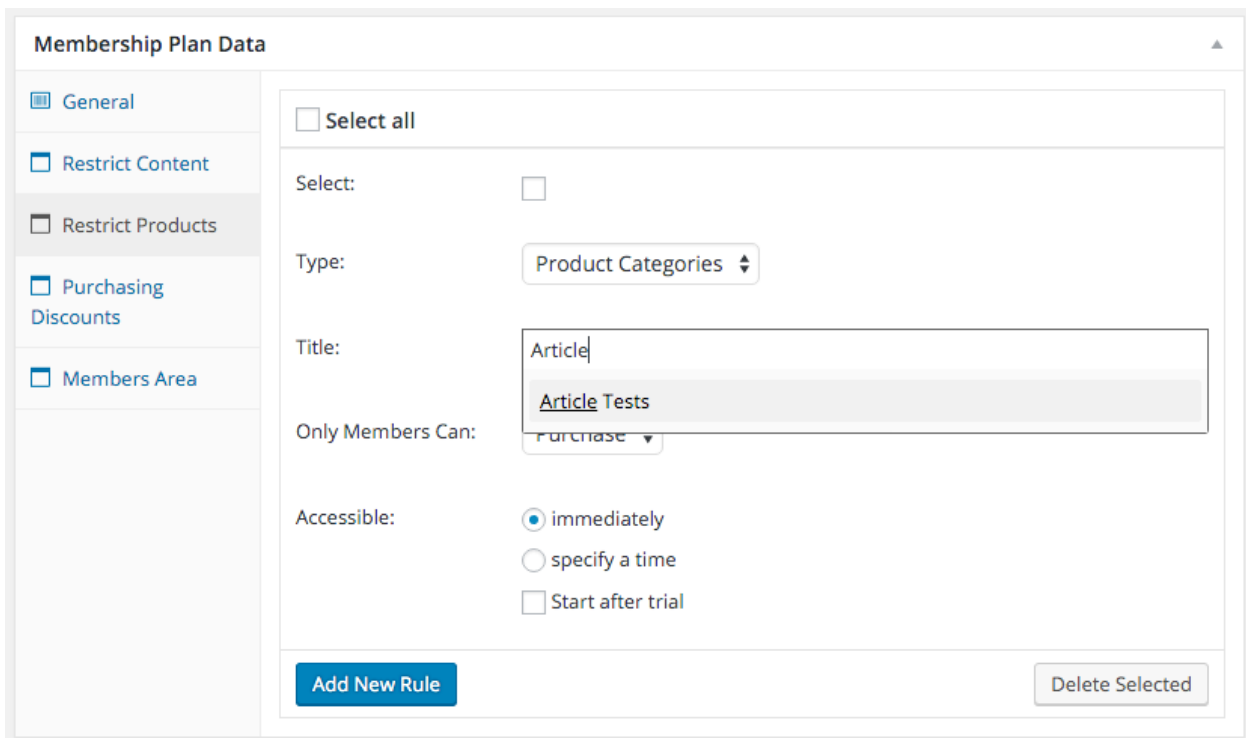
Next, navigate to the **Restrict Products** tab, then select *Product Categories* from the **Type** dropdown:



The screenshot shows the 'Membership Plan Data' form with the 'Restrict Products' tab selected in the left sidebar. The main form area contains the following fields:

- Select all
- Select:
- Type: A dropdown menu with 'Products' selected and 'Product Categories' highlighted.
- Title: A text input field with the placeholder text 'Search... or leave blank to apply to all'.
- Only Members Can: A dropdown menu with 'Purchase' selected.
- Accessible: Radio buttons for 'immediately' (selected) and 'specify a time'.

Once you've selected the Product Categories type, you can start typing the name of the category:



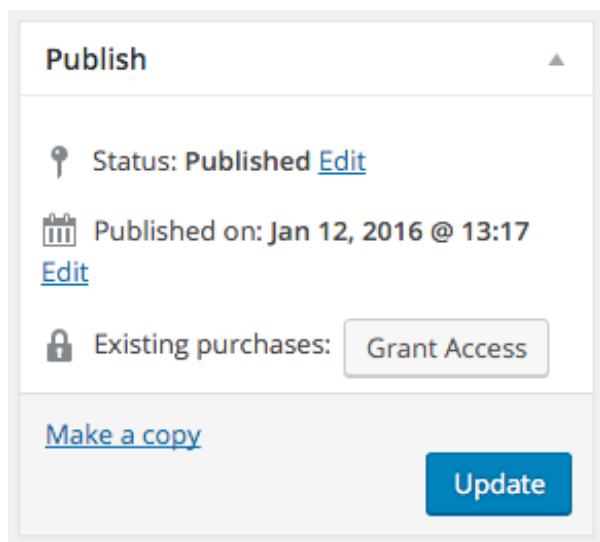
The screenshot shows the 'Membership Plan Data' form with the 'Restrict Products' tab selected in the left sidebar. The main form area contains the following fields:

- Select all
- Select:
- Type: A dropdown menu with 'Product Categories' selected.
- Title: A text input field containing 'Article' with a dropdown menu showing 'Article Tests' highlighted.
- Only Members Can: A dropdown menu with 'Purchase' selected.
- Accessible: Radio buttons for 'immediately' (selected), 'specify a time', and 'Start after trial'.

At the bottom of the form, there are two buttons: 'Add New Rule' and 'Delete Selected'.

Once you have selected the category, you may want to change the **Only Members Can** setting to **View** so that only members can see those products or leave it set to **Purchase** if you would like visitors to be able to see the products but not purchase them.

Once you're satisfied, click **Add New Rule**, then click **Update** in the **Publish** box.



Next you will want to go back and repeat this process for other membership types that should have access.

Note: You **do not need** to grant access to Participating Memberships as all Participating Members already have a Certified Shorthand Reporter membership!

Managing Orders

Introduction

Orders are created when a customer completes the checkout process and are visible by Admin and Shop Manager users only. Each order is given a unique Order ID.

An order also has a status. The order statuses let you know how far along the order is, starting from pending and ending with complete. The following order statuses are used:

- **Pending payment** – Order received (unpaid)
- **Failed** – Payment failed or was declined (unpaid). Note that this status may not show immediately and instead show as pending until verified (i.e., PayPal).

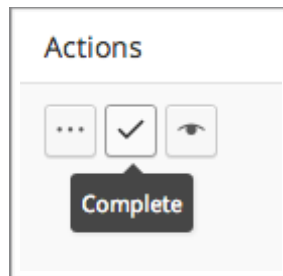
- **Processing** – Payment received and stock has been reduced- the order is awaiting fulfillment
- **Completed** – Order fulfilled and complete – requires no further action
- **On-Hold** – Awaiting payment – stock is reduced, but you need to confirm payment
- **Cancelled** – Cancelled by an admin or the customer – no further action required
- **Refunded** – Refunded by an admin – no further action required

Viewing orders

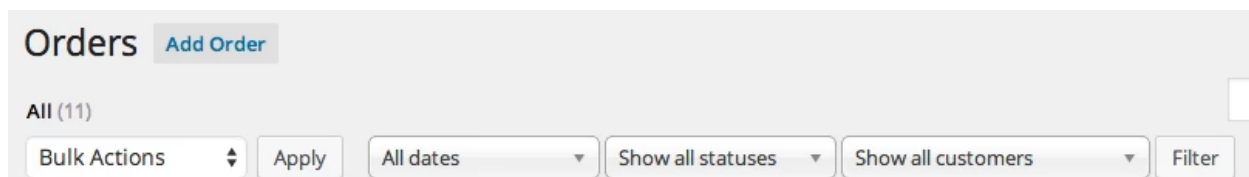
When you start taking orders the order management page will begin to fill up. You can view these orders by going to WooCommerce > Orders in the left hand admin menu.

Each order row displays useful details, such as the customer's address, email, telephone number, and the order status. You can click the order number or the 'view order' button to see the single order page (this is also where you can edit the order details and update the status).

Order rows also have some handy shortcut buttons to quickly mark orders complete and processing.



You can filter the list of displayed orders by date, status and customer by using the form at the top of the screen:



Editing/viewing single orders

From the single order page not only can you view all order data, you can edit and update it. You can:

- Change the order status
- Edit order items – modify the product, prices, and taxes
- Stock – Reduce and restore stock for an order
- Order Actions – Resend order emails to the customer using the drop down menu above the Save Order button. Send New Order, Processing Order, Completed Order or Customer Invoice emails – very handy if manually creating an order for your customers

Order Status

Orders marked **Processing** need to be completed by an admin. This is set up for physical items that need to be shipped - the order has been paid for and stock has been reduced and now it is up to you to complete the order by either shipping a physical item or simply reviewing the order and approving it, such as in the case of event tickets.

Event Ticket orders will be marked **Processing** and must be **Completed** by an admin before the tickets will be generated and emailed to the customer. It is advisable to ensure that there is available space left in the event before approving/completing a ticket order. Once the order is marked complete (remember to click **Update!**), the customer will receive an email containing their tickets.

Click here for more information on managing orders: <https://docs.woothemes.com/documentation/plugins/woocommerce/getting-started/managing-orders/>

Process Refunds

Click here for information on how to refund an order: <https://docs.woothemes.com/document/woocommerce-refunds/> (**Note:** refer to the **Automatic Refunds** section)

How to Add an Order Manually

1. Go to the list of orders - WooCommerce > Orders - and click the “Add New Order” button at the top of the page

2. You can either select an existing user to be the customer and have their details filled out automatically if they're on file, or you may need to enter the Billing Details manually by clicking the pencil icon at the top right of Billing Details. (see fig 1.0)

Add New Order

Order #5228 details

<p>General Details</p> <p>Order date: <input type="text" value="2016-10-31"/> @ <input type="text" value="12"/> : <input type="text" value="56"/></p> <p>Order status: <input type="text" value="Pending Payment"/></p> <p>Customer: <input type="text" value="Guest"/> <input type="text" value="deaj"/> <input type="button" value="Search"/></p> <ul style="list-style-type: none"> Deanna Jackson (#110 – deannajackson@gmail.com) Tatulova-Nadeau, Natalie (#228 – natalie.nadeau@gmail.com) Youngblood, Deanna (#253 – deanna.youngblood@shaw.ca) DiPaolo, Deanna (#386 – deannaocr@hotmail.com) 	<p>Billing Details</p> <p>Address: No billing address set.</p> <p>Court Reporting School Attended:</p> <p>Graduation Year:</p> <p>CAT Software Used:</p> <p>NCRA Certifications:</p> <p>NCRA ID:</p>	<p><input type="button" value="Edit"/> Shipping Details <input type="button" value="Edit"/></p> <p>Address: No shipping address set.</p>
---	---	---

	Cost	Qty	Total
Discount:			\$0.00
Shipping:			\$0.00
Order Total: <input type="button" value="Edit"/>			\$0.00
Refunded:			-\$0.00

Fig 1.0

3. Next, scroll down to the Products section and add items to the order by clicking on “Add items”. (fig 1.1)

Product	Cost	Qty	Total
Discount:			\$0.00
Shipping:			\$0.00
Order Total: <input type="button" value="Edit"/>			\$0.00
Refunded:			-\$0.00

Fig 1.1

4. You can either add products, fees or shipping costs. To add a product, click "Add products" (fig 1.2), then type a few letters to start searching for the product you want to add (fig 1.3). Select the one you want from the results, and then you can either continue searching and adding products or click the “Add” button if you’re finished adding products. (fig 1.4) To add a fee, click the “Add Fee” button, and a blank fee will appear as a line item. Click the pencil icon to edit the fee you added and change the name and price.

Product	Cost	Qty	Total
		Discount:	\$0.00
		Shipping:	\$0.00
		Order Total:	\$0.00
		Refunded:	-\$0.00

Fig 1.2

Order Total:

Refunded:

Add products

mem

- #246 - Membership Subscription
- #247 - Membership Subscription - Membership Type: Certified Shorthand Reporter / Participating Membership (\$125.00) - \$125.00
- #248 - Membership Subscription - Membership Type: Associate Membership (\$50.00) - \$50.00
- #249 - Membership Subscription - Membership Type: Student Membership (\$0.00) - \$0.00
- #758 - ASRA Spring Convention 2016 Earlybird Member Ticket

Fig 1.3

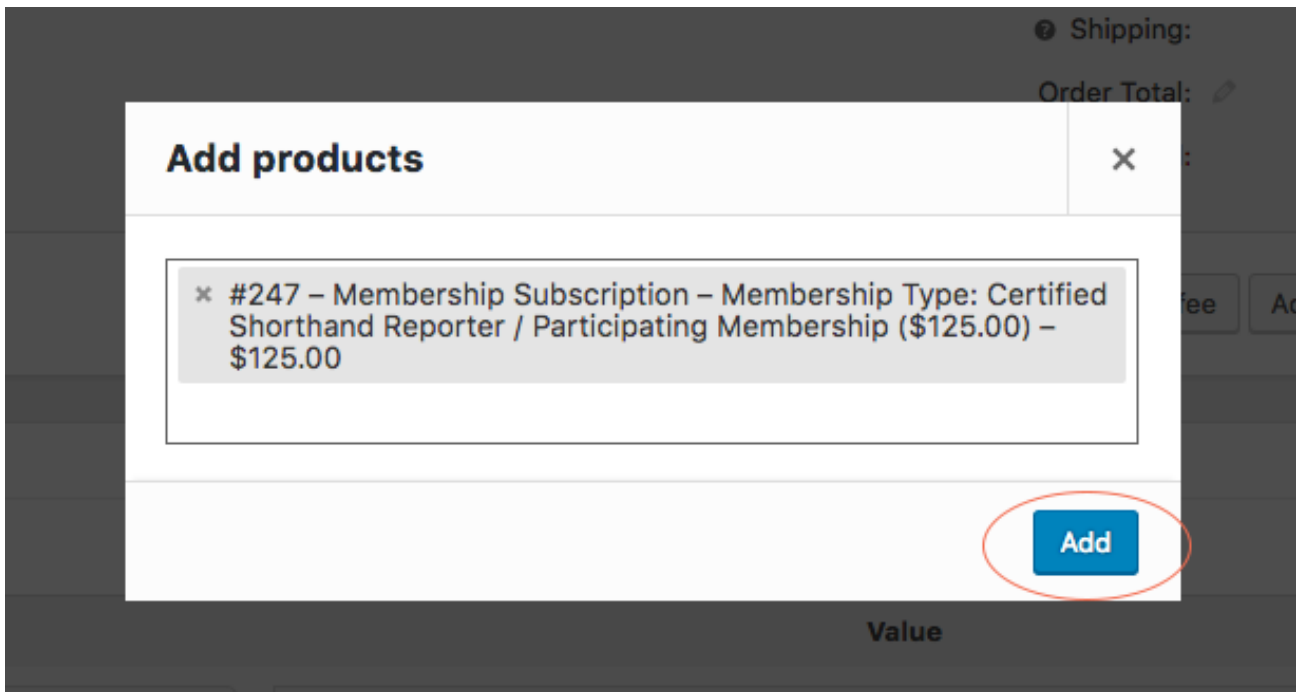


Fig 1.4

5. After adding products or fees etc. to the order, click the “Save” button in the bottom of the Products section. (fig 1.5)

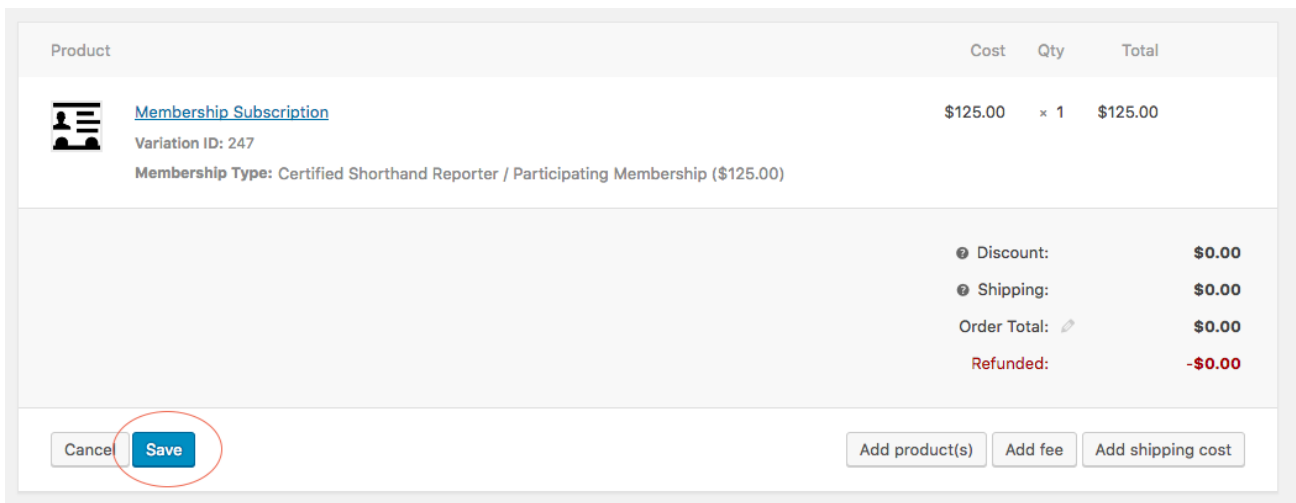


Fig 1.5

6. Once everything's been added to the order, click the “Calculate Total” button to update the Order Total (fig 1.6)


Product	Cost	Qty	Total
 Membership Subscription Variation ID: 247 Membership Type: Certified Shorthand Reporter / Participating Membership (\$125.00)	\$125.00	x 1	\$125.00
Discount:			\$0.00
Shipping:			\$0.00
Order Total:			\$0.00
Refunded:			-\$0.00

Fig 1.6

7. Change the Order Status to your desired status (in the General Details section next to Billing Details) (fig 1.7)

Add New Order

Order #5235 details

General Details	Bill
Order date: <input type="text" value="2016-10-31"/> @ <input type="text" value="13"/> : <input type="text" value="28"/>	Adc No
Order status:	Cot
<ul style="list-style-type: none"> Pending Payment Pending Payment Processing On Hold Completed Cancelled Refunded Failed 	Gra CAT NCI NCI

Fig. 1.7

8. Add a note to the order about the payment if desired, in the Order Notes section enter your note into the text box and click “Add” to add the note. (fig 1.8)

The image shows a software interface with two main sections: "Order Actions" and "Order Notes".

- Order Actions:** Contains a dropdown menu currently set to "Actions" and a blue "Save Order" button.
- Order Notes:** Contains the text "There are no notes yet." and an "Add note" section. The "Add note" section includes a text input field with the text "Customer paid \$150.00 via cheque - cheque #12345" and an "Add" button. Red circles highlight the text input field and the "Add" button.

Fig 1.8

9. Click the “Save Order” button to save the order. You can save at any point during the previous steps as well.

Users

Member Search Tags

How to add or remove available tags

Editing CE Points




1. Go to the Wordpress Dashboard (admin area), then go to **Users > All Users**.
2. Find the user you want to edit and click on their username. (Note: It might be helpful to order the users by email address or use the search bar at the top of the list.)
3. You should now be in the **Edit User** screen for that user; scroll down to the bottom of the page to find the **Education Credits & CE Points** section.
4. Click the tabs to switch between Education Credits and CE Points.
5. To add a brand new set of CE Points first click on the **Add Year** button to add a new section to that user's CE Points. You can also click the **(+)** or **(-)** buttons that appear on the right hand side of each CE Points section when hovering. **(+)** will add a new section above that particular section, and **(-)** will delete the section.
6. You can also **drag and drop** the sections by clicking on the numbers that are on the left of each section.
7. When you have made all of your changes, click the **Update User** button at the bottom of the page.

Education Credits & CE Points	
Education Credits	CE Points
CE Points	
Year *	<input type="text"/>
Article Tests	<input type="text" value="0"/>
ASRA Annual Convention	<input type="text" value="0"/>

Users [Add New](#)

All (370) | Administrator (4) | Subscriber (363) | Customer (3)

Bulk Actions ▾ Apply Change role to... ▾ Change

<input type="checkbox"/>	Username	Name	Email	Role
<input type="checkbox"/>	 aappelle Edit Delete		ahappelle@gmail.com	Subscriber
<input type="checkbox"/>	 aceborealis		ace.borealis@gmail.com	Subscriber
<input type="checkbox"/>	 AdeleJones	Adele Jones	adele125@shaw.ca	Subscriber

Certified Shorthand Reporter [Add a plan...](#)

Membership Details	<ul style="list-style-type: none"> Honorary Membership Council Certified Shorthand Reporter <input checked="" type="checkbox"/> Participating Membership Associate Membership Student Membership 	Billing Details
Plan:		Purchased in: Order 4906
Status:		Order Date: October 20, 2016
Member since:	<input type="text" value="2017-01-19"/> <small>YYYY-MM-DD - Update</small> <small>start date to plan start</small> <small>access date</small>	Order Total: \$125.00
Expires:	<input type="text"/> <small>YYYY-MM-DD - Update</small> <small>expiration date to plan</small> <small>length</small>	Subscription: 4907 - Edit Link
		Next Bill On: N/A

[Delete User Membership with Subscription](#)
[Delete User Membership](#)

Memberships

New Memberships

It is worth noting that when a user signs up for a new membership, by purchasing the membership on the website, their membership will automatically be activated by the

system once a payment goes through. **It will be up to an admin to review each new membership** subscription order and determine if the customer meets the qualifications required for an ASRA membership.

How it works:

1. The customer **purchases** a membership **subscription***. During the checkout process they create a user account (or log in to an existing account) on the ASRA website which their subscription will be tied to.
2. Once their payment is received, they are **automatically granted a membership**, and gain access to the Members-Only portion of the website

* Make sure to read the next section, **Memberships vs. Subscriptions** for important information regarding membership subscriptions.

At this point an admin will want to review the information that was submitted and determine if this user qualifies for the membership plan they subscribed to.

If the new member has signed themselves up for the **wrong membership** type, the admin may want to cancel the membership and process a refund, then explain to the new member that they have been refunded and that they should sign up for X membership instead.

Certified Shorthand Reporter		Add a plan...
Membership Details		Billing Details
Plan:	<div style="border: 1px solid gray; padding: 5px;"><ul style="list-style-type: none">Honourary Membership CouncilCertified Shorthand Reporter✓ Participating MembershipAssociate MembershipStudent Membership</div>	Purchased in: Order 4906
Status:		Order Date: October 20, 2016
Member since:	<input type="text" value="2017-01-19"/> YYYY-MM-DD - Update start date to plan start access date	Order Total: \$125.00
Expires:	<input type="text"/> YYYY-MM-DD - Update expiration date to plan length	Subscription: 4907 - Edit Link
		Next Bill On: N/A
Delete User Membership with Subscription		Delete User Membership <input type="button" value="Transfer"/> <input type="button" value="Save"/>

If the new member **does not qualify** for any ASRA membership, the admin may want to cancel the membership and process a refund, then explain to the new member why they don't qualify for an ASRA membership.

Memberships vs. Subscriptions

While **WooCommerce Memberships** works very well on its own to help you sell set-length memberships, it's very tightly integrated with **WooCommerce Subscriptions** to let you sell recurring memberships, as well as take advantage of some additional features that Subscriptions provides.

It is important to note that any time a membership is purchased via a subscription, the status and expiration will now be **tied to that subscription**. Even if the membership is supposed to be a one-year membership, the membership will still be valid so long as the subscription is active.

Pausing and canceling memberships should be done via the subscription rather than the membership status. Memberships uses Subscriptions as a guide completely if you allow it to.


View Memberships

Go to **WooCommerce > Memberships** to view a complete list of memberships and membership plans.

Members

The **Members** tab will display a list of users with a membership, which membership plan, the membership status (active, expired, etc.), the membership start date and its expiry date. If a user has more than one membership they will appear on the list multiple times - once for each membership. Click the user's name to view their membership in more detail and make changes if the membership is not tied to a subscription.

IMPORTANT NOTE: If the membership is tied to a subscription, **do not make any changes to the membership on this page**. Instead, you should edit their subscription. You will find a link to their subscription in the Billing column - simply click on the **subscription ID** number:

Associate Membership		Add a plan...
Membership Details		Billing Details
Plan:	Associate Mer ▾	Purchased in: Order 1447
Status:	Active ▾	Order Date: February 11, 2016
Member since:	2016-02-11  YYYY-MM-DD	Order Total: \$0.00
Expires:	Not yet ended	Subscription: 1448
		Next Bill On: October 1, 2016
		Delete User Membership with Subscription Delete User Members

In this example the **subscription ID** is 1448.

Membership Notes / Record Keeping

Below the plan details you will find a space to add membership notes. Some notes are added automatically by the system.

If you would like to set a membership as **“cancelled”** and **keep a record of the end date**, you will need to **leave the Expires field blank** and simply make a note of the cancellation date using the Membership notes. (This is because a membership status will automatically be changed to “expired” if the expiry date has passed.)

Membership Notes ▲

Add note ?

Notify Member

If you would like to **email your note to the member**, check off the **Notify Member** option. Notes with a purple background are notes that have been emailed to the member.

Membership Notes

Add note ?

Notify Member

This note was emailed to the member

added on March 2, 2016 at 11:49 am by [Delete note](#)

Participating Membership cancelled on March 2, 2016.

added on March 2, 2016 at 11:48 am by [Delete note](#)

There are no notes yet.

Membership Plans

The **Membership Plans** tab will display a list of membership plans. Click on a membership plan name to edit the plan details.

Managing Memberships Tied to Subscriptions

If a membership is tied to a subscription, you can opt to delete a user membership, or **delete with subscription**. Be cautious with the delete with subscription action, as this will delete both the user membership **and** the subscription in which it was purchased.

<input type="checkbox"/>	Name	Email
<input type="checkbox"/>	Beka	[Redacted]
	Edit Pause Cancel Delete Delete with subscription	
<input type="checkbox"/>	[Redacted]	[Redacted]

Delete this membership permanently and the subscription associated with it

You'll be asked to confirm this action, regardless of whether you use the membership action or the quick action, but it is **irreversible**.

Certified Shorthand Reporter		Add a plan...	
Membership Details		Billing Details	
Plan:	Certified Shor ▾	Purchased in:	Order 4906
Status:	Active ▾	Order Date:	October 20, 2016
Member since:	2017-01-19	Order Total:	\$125.00
	YYYY-MM-DD - Update start date to plan start access date	Subscription:	4907 - Edit Link
Expires:	2018-01-18	Next Bill On:	N/A
	YYYY-MM-DD - Update expiration date to plan length		
		Delete User Membership with Subscription	Delete User Membership
		<input type="button" value="Transfer"/>	<input type="button" value="Save"/>

Membership Statuses with Subscriptions

When a membership is purchased via a subscription, the **user membership statuses become tied to the subscription's statuses**. This allows you or your customers to change the subscription status and thus trigger a change in the membership.

If you **suspend** or **cancel** a subscription manually from your store's admin / dashboard, a **membership status change will also be triggered**. Suspending a subscription pauses a membership, while canceling a subscription will cancel a membership.

Customers can also make these changes themselves, depending on your Subscriptions settings. If you'd like to give customers the ability to manage their own membership pausing, upgrading, and downgrading, they can do so via Subscriptions. You can also read more about user membership statuses - <https://docs.woothemes.com/document/woocommerce-memberships-user-memberships/#statuses>

Learn more about WooCommerce Membership Subscriptions: <https://docs.woothemes.com/document/woocommerce-memberships-subscriptions-integration/>

Manage Participating Memberships

When a new member signs up for a Certified Shorthand Reporter / Participating Membership, the website gives them a CSR membership automatically. An administrator should review each new membership application and determine whether that member falls under a Participating membership or a CSR membership. If a member requires the

Membership Notes ▲

Add note ?

Membership plan changed to Certified Shorthand Reporter on 02/12/17

Notify Member Add Note

Membership access granted from purchasing Membership Subscription (Order 4906)

added on October 20, 2016 at 11:34 pm [Delete note](#)

Participating Member designation, then an administrator should change their CSR membership to a Participating Membership.

Switching a CSR Membership to a Participating Membership

To change a membership go to **Memberships** (or **WooCommerce > Memberships**) and click on the name of the member whose membership needs to be edited. You should see a tab named after their current membership plan, for example a tab titled *Certified Shorthand Reporter*, with some information about their Membership such as its status, start date, order date and subscription number.

Select Participating Membership from the Plan dropdown and click the Save button to change their membership type.

Switching to another membership type

Simply change the membership plan and save the membership to switch membership types. **Note:** The site does not automatically keep records of changes in membership plan. If you need to keep a record of the date that a membership plan was changed, use the Membership Notes section located below the membership information.

Tip: If you would like to **email your note to the member**, check off the **Notify Member** option. Notes with a purple background are notes that have been emailed to the member.

Link a Subscription to a Membership

Members who have signed up through the website by purchasing a subscription will have their Subscription linked to their Membership, as illustrated in the screenshot below:

If you have created a membership manually and the user has an active subscription, you will want to link the user's membership to their subscription. When a membership is linked to a subscription, the membership will be automatically paused when it's time to renew the subscription, and when the user pays their renewal fee the membership is automatically re-activated. If the membership is not linked to a subscription this would all need to be done manually.

To link a subscription:

1. Make sure the membership expiry date is set to **blank** otherwise it will override the subscription status.
2. Find the subscription ID that you want to link to. To find out, go to the Subscriptions section of the site to view the list of subscriptions. The subscription ID is what you click to view more details about the subscription.

<input type="checkbox"/>	Status	Subscription	Items	Total	Start Date	Trial End
<input type="checkbox"/>	ACTIVE	#5683 for Karen Munro	Membership Subscription ⓘ	\$125.00 / year Via Manual Renewal	2 days ago	-
<input type="checkbox"/>	ACTIVE	#5670 for Megan Kalan Rombough	Membership Subscription ⓘ	\$125.00 / year Via Manual Renewal	January 26, 2017	-

3. Once you have the subscription ID go to the membership that you want to link, and in the Subscription section of the membership's billing details click on 'Edit Link', and enter the subscription ID then select it.

Manage Membership Pricing

If an adjustment needs to be made to the cost of a membership, you will need to edit the Membership Subscription product. To do so, go to **Products** in the Wordpress dashboard.

Find the Membership Subscription product which most likely will be on the very last page. You can either navigate to that page or change the filters at the top of the page - try switching from *Show all product types* to *Variable Subscription* or select the *Memberships* category, then click **Filter**.

<input type="checkbox"/>		Name	SKU	Stock	Price	Categories
<input type="checkbox"/>		Membership Subscription	-	In stock	From: \$0.00 / year	Memberships
<input type="checkbox"/>		Name	SKU	Stock	Price	Categories

Click on the **Membership Subscription** product name to edit it, then scroll down to the **Product Data** section, and then select the **Variations** tab

Product Data — Variable Subscription

Default Form Values: No default Membership Type...

Add variation 3 variations (Expand / Close)

#249: Student Membership

#248: Associate Membershi

#247: Certified Shorthand F

3 variations (Expand / Close)

Hover and click on the membership type to expand it and reveal specific settings for that membership. Change the sign-up fee and subscription price to the desired price. The reason there is a sign-up fee is that a new member will not be charged for the subscription price until October 1, so if they sign up on January 1 they will pay the **sign up fee**, then on October 1 they will pay the **subscription price** to renew their membership.

Variations

#248: Associate Membershi

Advanced



SKU: ⓘ

Enabled Downloadable ⓘ Virtual ⓘ Manage stock? ⓘ

Sign-up Fee: (\$)

Free Trial: [?]

Subscription Price (\$)

 every

Subscription Length:

Sale Price: (\$) [Schedule](#)

Stock status ⓘ

Variation Description:

Synchronise Renewals: [?]