NASSGAP Website Documentation

This document will walk through functionality and processes for both the frontend of the website (for users/members) as well as backend procedures for Administrator users.

Members

Registration

https://www.nassgap.org/register/

New users/members can register for an account, as long as the URL to register is known — as well as the password to access the form. The current password to access the page is **NASSGAP**

Member Registration Form (screenshot)

Upon accessing the Member Registration page, there is a form with numerous required fields. Required fields have an asterisk (*) on the input label. The form has 3 basic sections:

1. General Info
    a. First Name *
    b. Last Name *
    c. Title
    d. State/Organization *
    e. Account Type *
        i. State Regular Member
        ii. State Voting Member
        iii. Associate Member
        iv. Friend of NASSGAP
    f. Password *
2. Contact Info
    a. Street Address
    b. City
    c. State
    d. Zip
    e. E-mail Address *
    f. Phone Number

    g. Fax Number
    h. Website
3. Communication Preferences
    a. Button to a separate "Add/Update Listserv" form, to request to be added
        i. https://www.nassgap.org/request-listserv/
    b. Checkbox for Billing Contact
        i. Will auto-subscribe the user to the appropriate MailChimp list
    c. Checkbox for Primary Contact
        i. Will auto-subscribe the user to the appropriate MailChimp list

Account Created

Upon completion of the form, the user will now have a User Account on the website, which is used to log in and gain access certain Members-only areas/features.

1. A Public Profile is automatically created, based on the form fields (screenshot)
2. A "Welcome to NASSGAP" email is sent to the user's email address (screenshot)

Public Profile

https://www.nassgap.org/user/

Public Visibility

A user's Public Profile is visible to all website visitors — whether a Member or an anonymous visitor. They can view all fields within the top General Info section and the Contact Info section (screenshot).
- However, they can NOT view the *Communication Preferences*.

Editing the Public Profile

A logged-in user can edit most all aspects of their Public Profile.

1. To begin, click the settings/gear/cog icon in the top right (screenshot)
2. Click "Edit Public Profile"
3. Add/change the profile photo by clicking the user image and choosing "Upload photo"
    a. Drag a photo into the "Upload your photo here" area, or click the "Upload" button to find an applicable file on your device.
    b. Change/adjust the crop of the photo.
    c. Click "Apply".
4. First Name, Last Name, Title, State/Organization, and Account Type can be changed.
    a. *State/Organization Member Status* can only be changed by an Administrator

5. Contact Info can be changed.
6. Click “Update Profile” button when done (or the checkmark icon in the top right).
7. Communication Preferences can be changed by clicking the “Notifications” link, which will open a new tab to that area in the User Account.

“My Polls” tab

Logged-in Members will see a “My Polls” tab on Public Profiles. This tab will conveniently show all of the polls that user has created. When viewing your own Public Profile, it will show your own list of polls.

User Account

https://www.nassgap.org/account/

When logged in, a Member can edit their account details. The User Account page also has a link for the user to view their Public Profile — since the User Account is different/separate from the Public Profile.

Upon accessing the User Account page, the user has abilities to view/modify certain aspects of their account:

Account

- Account Type (view only)
- Username (view only)
  This was auto-generated during registration, based on their first and last name. This isn’t really utilized on the website, other than:
  - Used in Public Profile URL (e.g., https://www.nassgap.org/user/exampleusername/)
  - Ability to log in with it, instead of their user email address
- First Name
- Last Name
- E-mail Address
  - Changing the email address here will also change which email is used to login

Change Password

- Set a new password if the current password is known

Billing Address
The address tied to the user’s billing information for purchases such as Memberships and Events. This is NOT shown to other Members, and it CAN differ from the address used in the Public Profile. It can always be updated/changed during the checkout process too.

Membership & Registrations
A list of all the user's current and past purchases of Memberships and Events, with the ability to view the details of each order.

Notifications
Change the user's *Email Communication Preferences*, which are tied to MailChimp email lists.

- Primary Contact
- Billing Contact
- All Members (this one is auto-added to a user account, when they first register their account)
- Button to a separate "Join/Update Listserv" form, to request to be added
    - https://www.nassgap.org/request-listserv/

Delete Account
User's can delete their own account, which will entirely remove that User Account from the website. The user's password is required before being able to delete the account.

Directory

https://www.nassgap.org/members/

The Membership Directory is visible to all website visitors — whether a Member or an anonymous visitor.

- However, anonymous visitors will NOT see Public Profiles that have a "State/Organization Member Status" of **Inactive**. Only logged-in users will be able to view those Public Profiles within the Directory.

Filtering
The Membership Directory is organized alphabetically, by last name.

1. You can narrow down results, by using the filters at the top:
    - Account Type
    - State/Organization
    - State/Organization Member Status
2. Click the "Search" button.
3. Any matching Members will be displayed, along with the count of Members returned.

Viewing Profiles
The Membership Directory page displays each Public Profile in a "card" grid format, with basic information on the Member card.

- If logged-in as a Member, then the Member Directory *may* also contain Public Profiles which have a "State/Organization Member Status" of **Inactive**.
    - Those Member cards will appear faded.
    - Only logged-in Members will be able to view the **Inactive** Member cards within the Directory. Anonymous visitors can not.
- A Member's full Public Profile can be viewed by clicking the name or photo on one of the Member cards.

Download Directory
The Membership Directory can be downloaded by all website visitors — whether a Member or an anonymous visitor.

- Click the the "Download Directory" button, to access the file.
- The file is a "CSV" format, which can be viewed in Excel, Google Sheets, OpenOffice Calc, etc.
- The file on the website is updated/refreshed every hour, on the hour. So it can be possible that the version downloaded is slightly out of date (by no more than an hour).

Member Portal

https://www.nassgap.org/portal/

The "Members Only Portal" is an area where logged-in users can view Members-only content. Once logged into the website, a "Members Only Portal" link will appear in the top menu.

Pages/Sections
The Member Portal contains various content broke out into individual pages and sections:
- Ballots (PDF document files)
- Committee Documents (PDF document files)
- Conference Presentations (PDF document files)
- Contracts and Grants (PDF document files)
- Correspondence (PDF document files)
- Meeting Minutes (PDF document files)
- Polls (list of available Polls, as well as a button to "Create & Manage Polls")
- Renew Membership (area to purchase yearly Associate or State Membership)
- Requests for Proposals (PDF document files)
- User Guide and Forms (various document files)

Files
Most of the pages/sections include numerous sets of files (usually PDF types). In most cases, these files are Member-only files. Therefore, extra security exists to prevent direct access to these private files unless logged-in as a website user.

Polls

https://www.nassgap.org/polls/

To view a thorough walk-through of the Polls feature, please view this how-to documentation.

Membership Renewals

https://www.nassgap.org/item-category/memberships/

The "Memberships" area is a category containing various Membership items which can be purchased. In most cases, there will be a yearly Associate Membership option and a yearly State Membership option.

- Membership options can only be purchased once per Organization, per year.
- Multiple years can be purchased at the same time, if the appropriate yearly item is available.
- Within each yearly Associate or State Membership item, is a drop down list of applicable Organizations.
- Selecting a particular Organization will display the availability status of that Membership:
    - Membership available
    - Membership has already been purchased for your state/organization

Renewal Process

When it's time for Membership Renewal, Members can:

1. Navigate to `Members Only Portal > Renew Membership`
2. Click the appropriate Membership item, for example: 2018-2019 State Membership
3. Choose the applicable Organization from the drop down list
    a. Each yearly Associate or State Membership item, is a drop down list of applicable Organizations.
    b. Selecting a particular Organization will display the availability status of that Membership:
        i. *Membership available*
        ii. *Membership has already been purchased for your state/organization*
4. Click "Add Item" to add it to your Cart
5. Click "Add Payment" to proceed to Checkout
6. Fill out the Billing Details and any other applicable fields
7. Choose to pay by Check or Credit Card
8. Click "Place Order"

9. Upon order submission, the user will receive email(s).
    a. If paying by Check:
        i. The **user will receive an "Invoice" email**, which will also include a reminder on where to send the Check.
        ii. The order will be marked as "On hold". It will NOT be marked as "Completed" until manually done so, after payment is received.
        iii. Once the order has been marked as "Complete", the **user will then receive a "Receipt" email**.
    b. If paying by Credit Card:
        i. The credit card will likely be automatically processed and charged, and the order will automatically be marked as "Completed".
        ii. The **user will receive a "Receipt" email**.
10. The Membership "Receipt" email will also contain information for the Membership purchaser, that can be sent along to their colleagues:
    a. Invite other individuals within the Organization, to register on the website.
    b. Inform existing users to review/update their account profiles.

Event Registration

https://www.nassgap.org/item-category/events/

The "Events" area (linked to, above) is a category containing various Event items which can be purchased. In most cases, there will be an annual NASSGAP Conference option.

- Only a single Event item can be purchased per order. Separate orders/transactions are required if trying to purchase/register multiple event attendees.
- There may be multiple Registration Options which drive the price (e.g., Non-Member vs. NASSGAP Member). Choose the appropriate pricing option from the dropdown.
- Within each Event item, multiple fields may be available to provide additional information during registration.
- During the payment step of the Checkout process, there may be fields to add the Attendee information — particularly in case the Attendee (ticket holder) person will be different than the Billing Details person.
- In most cases, Events are available to be purchased by both logged-in Members and anonymous visitors.

Finding Events

Events can also be found by various methods:

- `Main Menu > Events > Calendar`
  Navigate the Calendar to find the desired Event, and click it to view the actual Event item to register/purchase.
- `Main Menu > Annual Conference Information`
  Clicking the "Register Now" button will link you to the actual Event item to register/purchase.
- The *Events* area in the website footer contains the 2 most-upcoming Events.
  Clicking the "Register" button will link you to the actual Event item to register/purchase.

Event Registration Process

When it's time for Membership Renewal, Members can:

1. Navigate to the Event item
2. If applicable, choose the appropriate Registration Options (pricing) from the drop down list
3. Fill out any additional fields.
    a. Note that certain options (such as Meal tickets) may increase the price.
    b. This information will be saved with the order, and is also added to the order emails.
4. Click "Register" to add it to your Cart
    a. Note, if you already have an Event item in your cart, you will not be able to add another. You will either have to remove that item from the cart, or complete the order.
    b. A message will appear at the top of the Event item, if this is the case (screenshot).
5. Click "Add Payment" to proceed to Checkout
6. Fill out the Billing Details and any other applicable fields
7. Fill out the Attendee fields if they are present
    a. This *Attendee* will receive a Ticket/Confirmation email once the order is fully marked as "Completed".
    b. The *Attendee* will **not** receive the other emails related to the order, that the purchaser normally receives (e.g., Invoice and Receipt) — unless the Billing Details email address is the same as the Attendee email address.
8. Choose to pay by Check or Credit Card
9. Click "Place Order"
10. Upon order submission, the user (purchaser) will receive email(s).
    a. If paying by Check:
        i. The **user will receive an "Invoice" email**, which may also include information on Lodging.
        ii. The order will be marked as "On hold". It will NOT be marked as "Completed" until manually done so, after payment is received.
        iii. Once the order has been marked as "Complete", the **user will then receive a "Receipt" email**, which may contain information on Lodging.
    b. If paying by Credit Card:
        i. The credit card will likely be automatically processed and charged, and the order will automatically be marked as "Completed".

ii. The **user will receive a "Receipt" email**, which may contain information on Lodging.

Admins

Tickets (Events)

After guests register for an event (product) and their order is marked as "Completed", their Attendee details will show within the Tickets area. This section contains each attendee that is a "ticket holder" to an event, where each one has a unique Ticket ID.

- To more easily sort/filter based on a particular event, you can organize these guests/attendees by Purchase Date, Event Name, etc.
- This list can also be exported as a CSV, by clicking the "Export" button.

Additional information (e.g. meal tickets) for the attendees can be found within the separate *Orders* section, as mentioned further below.

Forms

Some forms can be embedded onto a page, and submitted by anyone. These forms are set up with the Gravity Forms plugin. Currently, this area contains these forms:

- Contact
- Request to join Listserv
- Request to register Organization

Form entries

Each user submission of each form is stored/saved and can be viewed from this area, by going to `Forms > The form of your choice > Entries`

You can click "View" on a form entry to view all of the available data/fields that were filled out.

Form exports

You can also export form submissions by going to `Forms > Import/Export > The form of your choice`. You can choose any/all of the fields associated with that form, as well as limit the data based on certain logic, or by date range. The export file is a CSV.
Screenshot: https://d.pr/free/i/8D5cak

Polls

To view a thorough walk-through of the Polls feature, please view this how-to documentation.

Default settings
Note that Administrators can also adjust the default settings that are initially enabled/disabled when a user creates a new poll by setting certain options, by going to:
`Polls > Options > Default settings`
Screenshot: https://d.pr/free/i/p12nxN

- This will not affect previous/existing polls, but it will become the new "default" for future polls.
- However, the settings can be overridden/adjusted on each new poll during creation.

Orders

All purchases will be stored/saved in the WooCommerce Orders section: `WooCommerce > Orders`

Changing views
Order information is initially listed in a table structure with certain columns. There are currently 2 separate "Views" that can be used, to change which *columns* show within the Orders section. Choosing from the Switch View dropdown (screenshot) will change the columns in the table:

- Orders Basic
    - *Status* — On hold, Processing, Completed, etc.
    - *Order Number* — Unique ID for each order
    - *Date* — Date/time the order was submitted
    - *Customer* — First and last name of the user who completed the transaction
    - *Billing Company* — Company name that was added to Billing Details
    - *Billing Email* — Email address that was added to Billing Details
    - *Product* — Comma-separated list of items that were purchased
    - *Total* — Overall dollar amount of the transaction
    - *Order Items* — Similar to "Product" column, but also contains the quantity of each
    - *Payment Method* — Credit Card, Check payments, etc.
    - *Customer Note* — Custom text that the purchaser may have added during checkout

- Event Details
  This includes the same columns as Order Basic, but also adds to additional columns of data, that is useful when viewing Event information captured during checkout.
    - *Attendee Details* — Attendee (ticket holder) fields captured on the Checkout page
    - *Event Details* — Custom field data captured from the Event registration page

Sorting/filtering Orders
Similar to other tables/lists/columns within WordPress, you can filter the Order list to display only certain Orders based on criteria — as well as sort by certain columns.

- Filtering
    - *Order status* — use the top links (separated by pipes) to choose a particular Order status (e.g., only show Orders that are "On hold")
    - *Dates* — use the "All dates" dropdown to select a particular Month of Orders
    - *User* — use the "Filter by registered customer" dropdown to search for a particular user account (search by name, email address, etc.)
    - *Billing Company* — use the "Any Billing Company" dropdown
    - *Billing Email* — use the "Any Billing Email" dropdown
    - *Product* — use the "Any Product" dropdown to find orders that contain a particular item such as a particular Membership or Event (filter by the overall item, or down to a particular "variation" of that item)
- Sorting
    - *Status*
    - *Date*
    - *Product*
    - *Total*
    - *Payment Method*

You can filter and sort at the same time, and even Export the current view, to capture only the Orders you want (e.g., show me all the Orders for the *2018 NASSGAP Conference* that are *Completed*, while sorted by *Payment Method*).

Viewing/Updating Order details
Within the Order table list, clicking on the Order Number will bring you into the Order Details. This area will provide additional information, and allow for editing/updating the Order.

1. Click the Order Number to view a particular Order
    a. If the Order contains an Event item, it will likely display the "Attendee Info" at the top of the Order Details (screenshot)
    b. In addition, an Order that contains an Event item, will contain any additional Event Registration fields that were captured, within the Order "Item" section (screenshot).
2. Update the Status by clicking the "Status" dropdown and changing it.
3. You can add a custom note to the order, in the right sidebar "Order notes" area.

    a. This can be a Private note, or one that gets emailed to the Customer (which will be sent, along with their Order details)
4. Click “Update” if changing something like the Status.
    a. If the status changes from something like “On hold” to “Completed”, the customer will likely be sent a “Receipt” email.

Products

Both Membership items and Event items are considered WooCommerce Products. These are created and managed by going to the `Products` link in the backend sidebar. From here, you can “Add New” items or “Edit” existing items.

Creating New Products
Whether creating a new Event item or a new Membership item, it is generally ideal to Duplicate or Clone an existing product that is similar to the one you want to create. This ensures all of the previous settings are already configured. Then, you would only need to modify the stuff that needs to change with the new item.

1. Hover over an existing product and click “Duplicate” or “Clone”.
    a. *Clone* — will create a new replica of your item and save it as a “Draft”. It will keep you within the list of Products (unlike the “Duplicate” option).
    b. *Duplicate* — will create a new replica of your item and save it as a “Draft”. In addition, it will also add *(Copy)* to the product title, and will bring you into the Edit Product screen, to start editing the new product
2. Start editing your newly created product.
    a. Update the *Title* to something different, to ensure its easy to differentiate this product from the one you copied it from.
    b. Update any other information as necessary (Descriptions, Pricing, Categories, etc.)
3. Once finished, click “Publish” to make the product go live (screenshot)
    a. Or click “Save Draft” to be able to publish it later.

FYI: Membership Products
Each year, two (2) separate Membership items should be created as NEW products. You should NOT try to rename the previous year’s product titles, as that may cause confusion with previous order data. Creating them as new items will allow for keeping old data tied to the other year’s Memberships.

For example:

- *2018-2019* Membership products could be:
    - 2018-2019 State Membership
    - 2018-2019 Associate Membership

- *2019-2020* Membership products could be:
    - 2019-2020 State Membership
    - 2019-2020 Associate Membership

Settings for Membership Products

Note, all of these settings will be carried over if you create a New item by copying from a previous one. However, this information/instruction is still mentioned below, just as an FYI. These steps are likely not necessary if working from a copied item.

1. *Product name* (title) should be unique for each item/year/membership
2. *Variable* product type
    a. Ensure the Product Type is set to "Variable product" (screenshot)
3. *Attributes* tab (screenshot)
    a. Choose the appropriate Attribute set from the dropdown and click "Add"
        i. The "State" Membership makes use of the State Organization attributes
        ii. The "Associate" Membership makes use of the Associate Organization attributes
    b. Uncheck "Visible on the product page"
    c. Check "Used for variations"
    d. Click "Select all" for the Value(s). This will prefill all the Values from the Attribute terms.
    e. Click "Save attributes"
    f. Now that the Attributes are added, we need to make them as actual dropdown options. This is done by creating a "Variation" for each of the Attributes…
4. *Variations* tab
    a. Select "Create variations from all attributes" from the dropdown, and click "Go".
        i. Note, WooCommerce can only create up to 50 variations per run. So if your product has more than 50 attributes/variations (which is the case for State Membership products), you will need to repeat the above step, to force WooCommerce to create any remaining Variations…
        ii. Select "Create variations from all attributes" again, if necessary, and click "Go". Worst case, it won't create any additional. Best case, it will add any additional Variations that weren't created in the first batch/run.
    b. Once all of the Variations have been created, you need to adjust certain options for each of them…
    c. Click the "Add variation" dropdown to choose Status > *Toggle "Virtual"*, then click "Go".
        i. This will automatically set all Variations as "Virtual" and therefore ensures no Shipping is required for the option.
    d. Click the "Add variation" dropdown to choose Pricing > *Set regular prices*, then click "Go".

        i. Enter the dollar value (without the $ symbol) that each Membership would cost (e.g., `1000`).
    e. Click the “Add variation” dropdown to choose Inventory > *Toggle “Manage stock”*, then click “Go”.
        i. This will allow you to set a specific stock quantity per each option.
    f. Click the “Add variation” dropdown to choose Inventory > *Stock*, then click “Go”.
        i. Enter a value of `1`
        ii. This will limit each Membership “Organization” option, so that it will automatically go “Out of stock” once it is purchased.
    g. You can now expand one of the Variation options, and it should appear like: https://d.pr/free/i/u1PBJl
5. *Product categories*
    a. All Membership products should be within the “Memberships” category, as well as one of the subcategories of “Associate” or “State” (screenshot).
6. *Product image*
    a. Click “Set product image” to create a main image for the item.
    b. The Media Library should open. You can search for the image (e.g., “membership”) (screenshot)
    c. Click the desired image, and then “Set product image” (screenshot).
7. *UM Content Restriction*
   In most cases, you will want to prevent Membership products from being accessed by the public (anonymous website visitors). For this reason, Membership products should be restricted to *Logged in users* only.
    a. Scroll down to the “UM Content Restriction” section of the product
    b. Check “Restrict access to this content”.
    c. Choose “Logged in users” from the “Who can access this content” dropdown.
    d. Choose “Redirect user” from the “What happens when users without access tries to view the content” dropdown.
    e. Choose “Login page” for the “Where should users be redirected to” dropdown.
    f. In the end, this section should look like: https://d.pr/free/i/d23ZfF
8. Publish
    a. Click “Publish” to make the new Membership item go live (screenshot).

Tweaking a copied Membership Product

If you created a new Membership item by copying (Cloning or Duplicating) a previous one, you should only need to update:

- *Product name* (title) to the new year(s)
- Ensure all Variations have an Inventory > *Stock quantity* of `1`
- Ensure all Variations have the desired *Pricing*

FYI: Events Products

Events are WooCommerce products that are able to be assigned specific dates, venue information, and that will also appear on the Calendar page. They may also, optionally, make use of additional functionality that can be added to the *Product data* area, to display and capture additional information regarding the Event.

- *Custom Attendee Fields* — fields to capture event ticket-holder info, which shows up on the final Checkout screen (e.g., screenshot)
- *Add-ons* — custom product options that can provide additional fields (checkbox, radio buttons, text input, etc.) on the Event item page, that can be filled out before Registering — and can also affect price if desired (e.g., screenshot)
- *Custom Tabs* — adds tabs, which can provide additional product information/sections at the bottom of the Event item page (e.g., screenshot)

FYI: Annual NASSGAP Conference
Each year, the NASSGAP Conference item should be created as a NEW product (by copying the previous one).
- You should NOT try to rename the previous year's product title, as that may cause confusion with previous order data.
- Creating the event as a new/copied item will allow for keeping old data tied to the other year's Conference.

Settings for Event Products
Note, all of these settings will be carried over if you create a New item by copying from a previous one. However, this information/instruction is still mentioned below, just as an FYI. These steps are likely not necessary if working from a copied item.

1. *Product name* (title) should be unique for each item/event
2. Product data — set desired Product Type
    a. Ensure the *Product Type* is set to "**Variable** product" only if you plan to have more than one (1) ticket type (e.g., *NASSGAP Member* and *Non-Member*)
    b. Otherwise, use "**Simple** product".
3. *General* tab (if Product Type is "**Simple** product") (screenshot)
    a. Specify a Regular price.
    b. Optionally, set a Early Bird (Sale) price — along with an optional start and end date for the sale
4. *Inventory* tab
    a. Ensure "Solid individually" is checked (screenshot)
    b. This ensures only 1 event can be purchased per transaction, which is the preferred method, due to Attendee information is properly collected during checkout.
5. *Attributes* tab (if Product Type is "**Variable** product") (screenshot)
    a. Choose the "Registration Options" from the dropdown and click "Add"
    b. Uncheck "Visible on the product page"
    c. Check "Used for variations"
    d. Click "Select all" for the Value(s). This will prefill all the Values from the Attribute terms

            i. Which will be used to create ticket options (e.g., *NASSGAP Member* and *Non-Member*)
    e. Click “Save attributes”
    f. Now that the Attributes are added, we need to make them as actual dropdown options. This is done by creating a “Variation” for each of the Attributes…

9. *Variations* tab (if Product Type is “**Variable** product”) (screenshot)
    a. Select “Create variations from all attributes” from the dropdown, and click “Go”.
    b. Once all of the Variations have been created, you need to adjust certain options for each of them…
    c. Expand each Variation and manually enable the “Virtual” checkbox
        i. This ensures no Shipping is required for the option.
    d. Expand each Variation and manually add a “Regular price ($)” for each one.
    e. By default, the *Stock status* will be “In stock”.
        i. You can change each variation’s *Stock status* to instead be “Out of stock” to prevent users from purchasing it until you’re ready for them to. At which point you can set it back to “In stock”.
        ii. Optionally, you can enable the “Manage stock” checkbox, and then set a “Stock quantity” if you want to set a specific stock quantity per each option.
            - This will limit each ticket option, so that it will *automatically* go “Out of stock” after the specified quantity is sold out.
    f. Optionally, add a brief “Description”, that would show when that particular option is chosen during registration.
    g. You can now expand one of the Variation options, and it should appear like: https://d.pr/free/i/zbnYHH

10. *Custom Attendee Fields* tab (screenshot)
    This information is captured during the final stage of Checkout/Payment, and is used to acquire information about the Attendee (ticket holder), and also gets included in Order emails. Adding any fields, besides these ones, may not properly get captured/displayed on the Order emails. The fields/labels that should be added are:
    a. **Address** — Text (required)
    b. **City** — Text (required)
    c. **State/Province** — Select (required)
    These are the “Options” that should be added:
        i. `Choose a State... | Alabama | Alaska | Arizona | Arkansas | California | Colorado | Connecticut | Delaware | District of Columbia | Florida | Georgia | Hawaii | Idaho | Illinois | Indiana | Iowa | Kansas | Kentucky | Louisiana | Maine | Maryland | Massachusetts | Michigan | Minnesota | Mississippi | Missouri | Montana | Nebraska | Nevada | New Hampshire | New Jersey | New Mexico | New York | North Carolina | North Dakota | Ohio | Oklahoma | Oregon |Pennsylvania | Rhode Island | South Carolina | South Dakota | Tennessee | Texas | Utah | Vermont | Virginia |`

`Washington | West Virginia | Wisconsin | Wyoming | American Samoa | Guam | Northern Mariana Islands | Puerto Rico | Trust Territory of the Pacific Islands`

   d. **Postal Code** — Text (required)
   e. **Organization** — Text (required)
   f. **Title** — Text (required)

11. *Add-ons* tab (e.g., [screenshot])
    This information is captured on the actual Event item page itself, as additional fields during Registration (before the user adds it to their cart).
    a. Click "New add-on" to create a field of data to collect from the user. Options include:
       i. *Checkbox* — shows a checkbox or checkboxes that can be ticked/unticked by a customer
       ii. *Radio buttons* — shows a radio button or radio buttons from which the user can choose only one
       iii. *Select box* — shows a dropdown list of options from which the user can select one
       iv. *Custom input (text area)* — shows a text field where users can write multiple lines of text (character limit possible)
       v. *File upload* — allows users to upload a file
       vi. *Additional Custom Price Input* — shows a field where users can enter a numerical value that is added to the product price
       vii. *Additional Price Multiplier* — shows a spinner where users can input a number (e.g., quantity)
       viii. *Custom input (text)* — There are five in-built types. This shows a text field where users can enter either any text; just letters; just numbers; both; or an email address only
    b. Add a "Name" for your add-on group. Displayed on the product page above any fields you add to the group.
    c. Optionally set any groups as "Required fields", if the add-on requires a value/selection.
    d. Add a "Description" to the add-on. Shown beneath the group name on the frontend.
    e. Ensure "Global Addon Exclusion" is checked
    f. Examples: https://d.pr/free/i/tubm8v

12. *Custom Tabs* tab (e.g., [screenshot])
    This area will add additional tabs to the bottom of the Event item page, so each Event is able to have its own set of custom tabs (in addition to the regular "Event Details" one that is automatically added).
    a. Click "Add a Tab"
    b. Give a custom "Tab Title"
    c. Add the tab's content
    d. Click "Save Tabs"
    e. Ensure you don't add TOO many tabs, as it may cause display issues and/or confuse the user.

13. *Event* tab (e.g., screenshot)
    This area is what changes the “regular” product into an “Event” product… which will also add it to the Calendar, and provide the automatic “Event Details” tab at the bottom of the item.
    a. Is this product an event? — Yes
    b. Number of Days — Select how many days the event goes for
    c. Multi-day type — Choose if the event spans sequential days, or choose the specific dates.
    d. Start Date — Choose the first date of the event
    e. End Date — Choose the final date of the event
    f. State time — Optionally choose the initial start time of the first day
    g. End time — Optionally choose the end time of the last day
    h. Venue — Type in the venue’s name
        i. e.g., `Embassy Suites by Hilton Albuquerque Hotel & Spa`
    i. Directions — Usually type in the address of the location. Example:
        i. `Address:`
           `1000 Woodward Place NE, Albuquerque, NM 87102`
    j. Email — Usually `nassgap@nassgap.org`
    k. Ticket logo — Usually `https://www.nassgaporg.com/wp-content/uploads/NASSGAP_Logo_WithTag_RGB.png`
        i. This is added to the ticket email that the Attendee will receive.
    l. Ticket subject — Usually `NASSGAP Conference Ticket {OrderNumber}`
        i. This is added to the ticket email that the Attendee will receive.
    m. Ticket text — Optionally add text that will be added to the bottom of the Attendee’s ticket email.
    n. Choose which information to provide on the Attendee ticket email (e.g., screenshot); and ensure certain data is collected during Checkout. Usually:
        i. *Include purchaser or attendee details on ticket*
        ii. *Display "Add to calendar" on ticket*
        iii. *Display date and time on ticket*
        iv. *Display barcode on ticket*
        v. *Capture individual attendee details*
            - **This one is important!**
        vi. *Email attendee rather than purchaser*
            - This sends the Ticket email to the *Attendee* rather than the user who bought the Event item
        vii. *Capture attendee telephone*
            - **This one is important!**
        viii. *Email tickets*
            - This will cause the Ticket email to be sent once the Order is marked as “Completed”
14. *Product categories*
    a. All Event products should be within the “Events” category * (screenshot).

15. *Product image*
    a. Click “Set product image” to create a main image for the item.
    b. The Media Library should open.
    c. You can search for the image or Upload a new one.
        i. To upload a new one, either drag the image into the Media Library area, or click the “Upload Files” tab, then “Select Files” to find the image on your device.
    d. Click the desired image, and then “Set product image” (screenshot).
16. *Post Expirator* (screenshot)
    a. Check the box to “Enable Post Expiration”
    b. Specify the date and time that the Event should be “hidden”.
    c. Set “How to expire” to be “Draft”.
    d. This is used to ensure it is removed from the website Footer after the Event is over, otherwise it would continue to show, since the Footer area shows the “oldest”... even if they have expired. This ensures that “past events” are removed from that area.
17. Publish
    a. Click “Publish” to make the new Event item go live (screenshot).

Tweaking a copied Event Product

If you created a new Event item by copying (Cloning or Duplicating) a previous one, you should update:

- *Product name* (title) to the new Event name
- Ensure the proper *Attributes* (Registration Options, which is used to set multiple ticket options) are applied, if applicable
- Ensure all desired Variations (which are the multiple ticket options/types) are added, if applicable
- Ensure all Variations have the desired *Pricing*
- Ensure all Variations have the *Stock status* set to “In stock”
    - Alternatively, you can limit the amount of tickets, by enabling “Manage stock”, and then specifying a particular count for *Stock quantity*.
- Ensure the necessary *Custom Attendee Fields* are present.
- Update/edit any desired *Add-ons*.
- Update/edit any desired *Custom Tabs*.
- Ensure all Event options are set, including:
    - Is this product an event? — Yes
    - Number of days
    - State Date
    - End Date
    - Start time (optional)
    - End time (optional)
    - Venue (name)
    - Directions (usually contains the address)
- Update the *Product short description* if necessary.

- Update the *Product image*, if desired.
- Update the *Post Expirator* date, to ensure it is removed (set as Draft) from the website Footer after the Event is over.

*** Event Category limit**
Note that products within the "Events" category will automatically have a limit set, so that a user can only add 1 of those products to their cart at a time.

- This is the case for any/all products that happen to be within the "Events" category.

Media (private files)

Adding "private" (Member-only) files is slightly different than uploading files to the regular Media area.

- Files that will be linked to, from Member Portal pages, should often make use of the extra security that exists, when uploading files to the "private" folder.
- This is to prevent direct access to these private files unless logged-in as a website user.

How to upload Private files

1. Navigate to Media Library Folders Pro
2. Drill into the "private" folder within the folder tree and click the "private" folder.
3. Optionally choose a subfolder to add the file into (click that folder)
    a. The "general" folder can be used if desired, for random files
4. Once you've chosen the applicable private sub-folder to add the file to, click "Add File"
5. Drag-and-drop the file into the designated area, or click "Choose File" to browse your device for a particular file.
    a. If using the "Choose File" method, click "Upload Image" after you've chosen your file.
6. The file is now added to the designated private folder (screenshot).
7. To get the full private path to the file, you can click on it (or right-click to open in a new tab)
8. Then, copy the "File URL" within the "Save" metabox (screenshot).
   The path should look something like:
   `https://www.nassgap.org/wp-content/uploads/private/general/test.txt`
9. You can paste this File URL into a Members Only Portal page, to give Members access to it.

Users

All users with a website account will be listed in the backend `Users` area. In addition, Administrators can modify existing users on the frontend of the website too, from the Member Directory.

Editing a Public Profile

Administrators can edit any user's Public Profile, by viewing the Member Directory and clicking "Edit Profile" on any of the cards. Once editing a user's Public Profile, they can change information in the same way as editing their own profile.

Changing views

User information is initially listed in a table structure with certain columns. There are currently 3 separate "Views" that can be used, to change which *columns* show within the Users section. Each view contains different types of user information. Choosing from the Switch View dropdown (screenshot) will change the columns in the table:

- Basic Info
  - *First name* — user's first name (pulled from their Public Profile)
  - *Last name* — user's last name (pulled from their Public Profile)
  - *Email* — user's email address which is also used to login (pulled from their Public Profile)
  - *Role* — regular website users should have a NASSGAP role, while users with full backend access should have an Administrator role
  - *Account Type* — State Regular Member, State Voting Member, Associate Member, Friend of NASSGAP (pulled from their Public Profile)
  - *State/Organization* — the State/Organization that this user belongs to (pulled from their Public Profile)
  - *Member Status* — the State/Organization Member Status of this particular user (pulled from their Public Profile)
  - *Nickname* — the username of the user account
- Profile Info

  Contains similar columns as above, plus additional columns:
  - *Street* — user's address Street (pulled from their Public Profile)
  - *State* — user's address State (pulled from their Public Profile)
  - *Zip* — user's address ZIP code (pulled from their Public Profile)
  - *Phone* — user's telephone number (pulled from their Public Profile)
  - *Fax* — user's facsimile number (pulled from their Public Profile)
  - *Website* — user's website address (pulled from their Public Profile)
- More Info

  Contains some similar columns as previous Views, plus additional columns:
  - *User ID* — unique number to identify the user by
  - *Username* — similar to the Nickname column, but also includes their Profile photo (photo pulled from their Public Profile)
  - *Orders* — list of Order IDs that belong to the user along with their current status (hovering will show additional info, while clicking will bring you to the Order Details)
  - *Account Created* — the date/time the user registered
  - *Last Login* — the date/time the user last logged into their account
  - *Stripe ID* — unique ID that links this user to the credit card processor

Sorting/filtering Users

Similar to other tables/lists/columns within WordPress, you can filter the User list to display only certain Users based on criteria — as well as sort by certain columns. The fields that you're able to filter by will change based on which View (columns) is being used from the top dropdown.

Creating a New User
If/when creating a new user, it would be ideal to do this through the regular frontend Member Registration form, to ensure the proper data is filled in correctly, for their Profile.

Assigning a new Role to an Existing User
Once a user has registered, you may wish to give that user certain privileges/capabilities within the admin side of the website. There are currently two roles that you can utilize to grant a user additional access to backend features:

- **Administrator** — this is the highest role a user can have, and will be able to access all areas of the backend, and has full control and capabilities to delete pages, orders, users, etc. This should be granted sparingly.
- **Shop Editor** — this role has been custom created, so that it's similar to the Administrator role, but ONLY has access to the WooCommerce areas of the backend. So, this user would be able to manage orders, products (events and memberships), etc. They can edit, create, or delete items related to WooCommerce.

1. Navigate to Users
2. Hover over the User you wish to grant the additional role to, and click "Edit"
3. Scroll down halfway, and find the "Additional Capabilities" title (screenshot)
    a. The dropdown should be blank if the user hasn't had an additional role yet.
4. In the dropdown, choose either *Administrator* or *Shop Editor*
    a. It is not recommended to grant any of the other options at this time.
5. Scroll down and click "Update User"
    a. That user is now a NASSGAP user, with an additional "Role" (capabilities)

If a user becoming an *Administrator*, they do NOT need the Shop Editor role too, since they would already have those capabilities.

Please ensure you are changing the correct "Other Roles" area, as mentioned above. There is an additional/separate "Role" dropdown near the top of the user edit area… but that should only ever be "NASSGAP". Otherwise, the would not be shown in the directory.

Exporting

Many of the Administrator areas contain data organized as lists/tables with multiple columns. These particular areas are often able to have their data exported, by clicking the “Export” button at the top (next to the Filter dropdowns).

- Doing so will export a CSV file to your device
  Note that some of the formatting may differ in the CSV compared to what you saw on screen, since the CSV file has no formatting.

If the “Export” button does not appear yet, you can click “Screen Options” to enable the “Show Export Button”, then click “Apply”. Screenshot: https://d.pr/free/i/CN3h6l

Using filtering/sorting before export
The data that is exported can be adjusted (filtered and/or sorted) prior to exporting. The items (rows) and current sorting method on the screen will be utilized when exported. So feel free to filter out certain items, or sort by a particular column before clicking the “Export” button.

Sections make use of this type of Export functionality
- Tickets (screenshot)
- Orders (screenshot)
- Users (screenshot)
  - Note this is different than the Member Directory export
  - When exporting Users from this area, make sure to use the regular “Export” button, and not the “Export Users” button (screenshot)

Other information that can be exported
- Gravity Forms (see the Forms documentation)
- Polls (individual poll results) (see the Polls documentation)
- Member Directory (see Directory documentation)

Using the CSV
After exporting the data to the CSV file, it may be preferred to open the document in Excel. This will allow you to take the data and utilize Excel’s “Format as Table” option to convert it into a style table, with the option to add additional formatting — as well as make use of data headers with sorting/filtering.

Adding/adjusting new or existing State/Organization options

When adding, removing, or updating a State/Organization, you will need to adjust a few areas to ensure the new data appears in all expected areas:

Member Registration *
- `Ultimate Member > Forms > Member Registration > State/Organization`
- Click the "Edit" pencil icon for the dropdown field
- Add/update options within the "Edit Choices" area
- Each option should be on its own line
- Click "Update"

Public Profile *
- `Ultimate Member > Forms > Public Profile > State/Organization`
- Click the "Edit" pencil icon for the dropdown field
- Add/update options within the "Edit Choices" area
- Each option should be on its own line
- Click "Update"

** Note:*
The State/Organization dropdown list for the Ultimate Member areas (*Member Registration* form and *Public Profile* form) must be the exact same — including spelling and spaces. Otherwise, the user will have difficulty when editing their Public Profile. Updating one field, will not update the other. So you will need to update both separately.
- Also, note that editing or removing an existing option will NOT update or remove it from any current users that may already have that option in their Public Profile.
- The only way to update those, is to manually go into their Public Profile and edit it, to choose the new option.
- Also note, these two above areas are entirely separate from the next "Product Attributes" area. The latter of which can be entirely separate/different options if desired.

Product Attributes
State/Organization options within a Membership item are stored as WooCommerce Product Attribute "Terms" by going to: `Products > Attributes`

The two Attributes of concern are:
- Associate Organization
- State Organization

To edit or add options for those Membership item attributes, you need to:
1. Click the "Configure terms" link for the applicable Attribute
2. Edit an existing option by hovering over it and clicking Edit or Quick Edit
    a. You only need to change the "Name" field (screenshot)
    b. After updating the Name of an existing option, it will automatically update that option within any existing Membership items that previously had that option, to the new name.
3. Add a New option by typing the new Name into the field (screenshot)

a. Note, this will only update the list for future use. Any existing Membership items will not automatically be updated with new fields.

b. To add new fields to existing items, you will need to add a new Variation the existing Product: `Products > your membership product > Edit > Product data section > Attributes`

    i. Begin typing in the new value and choose it when it appears (screenshot)

    ii. Click “Save attributes”

    iii. Click “Variations” for this product

    iv. Choose “Add variation” > Go

    v. A new empty Variation has been created

    vi. Update the dropdown to the new option

    vii. Expand the new Variation to add the proper data:

        1. Enabled
        2. Virtual
        3. Manage Stock
        4. Regular Price ($ amount)
        5. Stock quantity (1)

    viii. Click “Save changes” at the bottom of that Variations area

    ix. Click “Update” (screenshot)