



## Step by Step User Guide

### Clone a new site

- 1) Login as admin
- 2) Hover over My Sites, hover over Network Admin and select Dashboard from the list.
- 3) In the left sidebar, click on NS Cloner.
- 4) Under Select Source, choose the site you want to clone under the “Or select” dropdown menu. (Use Agency Demo Site).
- 5) Under Create New Site > “Give the Target site a Title”, enter the name of the Client’s site.
- 6) Under Create New Site > “Give the Target site a URL (or "Name" in WP terminology), enter the text that will form the new site URL, (i.e. it will be “newtext”.benefitseasyportal.com).
- 7) Select Clone in the big gold button at the bottom.
- 8) It should give you a notice that the site was successfully created, and you can then go to the new site under My Sites and start editing it.

### Step 1: Basic Setup & Customization

- 1) Update logo & favicon
  - a. In the admin dashboard, click on Site Settings on top left of black bar.
  - b. Under Site Settings, there is a place to add the site logo and favicon, including a Upload Image button or space to copy and paste a URL if the logo is already in the Media Library.
  - c. Click Update Settings.
- 2) Update site title & tagline
  - a. Click on Site Settings on top left of black bar.
  - b. Under Site Settings, there is a place to add the site title and tagline.
  - c. Click Update Settings.
- 3) Change site color scheme
  - a. Click on Site Settings>Fonts & Colors at the top left in the admin dashboard.
  - b. There are numerous options to change the site colors here, each of which controls colors for different parts of the site.

- c. You will usually be changing the Primary colors, which changes the trim/accent color.
  - d. You can also override them for a specific page if you want to – those options are on the page itself.
  - e. Click Update Settings
  - f. Note: This should change the accent on ALL pages INCLUDING benefit pages OR we change the design for the benefit pages so if a request comes in to change we don't have to manually do this everywhere. The document upload color – can this be part of the color scheme or set to standard gray.
- 4) Change banner features
- a. Click on Site Settings>Banner Settings at the top left in the admin dashboard.
  - b. You can change the and title and text here, along with the button text and link.
  - c. You can also change the Video URL here – YouTube and Vimeo are supported, other video services may not work.
    - i. To enter a YouTube video, go to the YouTube video's page
    - ii. Click on Share, which will pull up a popup box
    - iii. Click on Embed, then copy and paste the code into a blank document
    - iv. Copy just the <https://www.youtube.com/embed/XXXXXXXXXX> and paste it into the Video URL box.
    - v. To remove the video entirely, make the Video URL blank.
  - d. You can change the banner font color under Foreground Color – make sure it is a different color than the banner image so it is easily visible.
  - e. The banner image can be changed under Hero Background Image, including a Upload Image button or space to copy and paste a URL if the logo is already in the Media Library.
  - f. Click Update Settings.
- 5) Update footer
- a. Click on Appearance>Widgets at the top left in the admin dashboard.
  - b. Click on Left Footer at the top right of the Widgets screen.
  - c. Click on the arrow on the right side of the box that says Text.
  - d. In the popup box, enter the text you want to appear in the footer.
  - e. Click Save, then once it has saved click Done.
- 6) Language translation buttons – contact eTekhnos support for help with this feature.

## Step 2: Editing and Adding Pages

- 1) In the admin dashboard, click on Pages>All Pages to see the list of all pages.
- 2) To Edit an Existing Page
  - a. Click on the name of the page you wish to edit, or you can click Edit under the page name as you hover over it.
  - b. You can change the banner image and text here under Page Header Background and Subtext.

- c. Scroll down to the WPBakery Page Builder.
- d. Hover over the item that needs to be updated (i.e. Custom Heading Text: Benefits at a Glance”, and click the Pencil/Edit Icon.
- e. In the popup box, make changes to the title text, then click Save Changes.
- f. Repeat for any other items that need to be updated.
- g. To update buttons links, click on the Edit icon for that button, select the PDF document from the Media Library (there will be a Media Library button so the user can select the document once all of the buttons have been swapped out for the new Document buttons).
- h. To add a new page item, click on the + sign at the bottom of the section where you want to add the new item, and then select the kind of item you want to add.
- i. Click Save Changes.
- j. To add a URL link, use the “General Button.”
- k. Once all edits to the page have been made, click on Update at the top right of the page to make all changes live .

### 3) To Add a New Page

- a. In the list of pages, find the page you want to clone, hover over the page name, then click the “Duplicate This” option and you can clone the page.
- b. Open the new page and change its title to something new.
- c. Go to Appearance>Menus in the left sidebar.
- d. Click the box next to the new page on the left, and click Add to Menu.
- e. The new page will appear in the Menu Structure at the bottom of the list.
- f. You can click on the page and holding it down drag it up to where you want the new page to go, either as a top level menu item or a subpage below another page (subpages are indented to the right).
- g. You can also remove pages by clicking on the black arrow next to the word Page at the right of each menu item, then clicking Remove.
- h. Once the menu edits are complete, be sure to click Save Menu at the top or bottom.

## Step 3: Adding Documents, Images, etc. to Media Library

- 1) In the admin dashboard, click on Media>Library to see all of the documents and images that have been uploaded so far.
- 2) To get the URL of a document or image to add to a page, click on the desired item.
- 3) At the right in the URL field, copy the URL and then paste to the page or link you are working on.
- 4) To add a new image, click on Add New at the top of the Media Library.
- 5) Either drag and drop the image from your computer, or browse to the image on your computer by clicking on Select Files.

- 6) If the media file is too large to be added to the site, contact eTekhnos support for assistance.
- 7) \*\* See Portal Images Helpful Tips at the bottom for help with sizing and editing images.

## Step 4: Editing Benefits Page Sections

- 1) The Benefits page has multiple sections that can be edited, reordered, deleted, etc.
- 2) From the All Pages list, click on Benefits to edit that page.
- 3) The benefit section are listed in an accordion-style feature under the WPBakery Page Builder.
- 4) By Default the Medical section is open – you can close it by clicking on the hyphen to the left of the word Medical.
- 5) Once it is closed, you can see all of the different sections listed out by heading.
- 6) The sections can reordered by dragging and dropping the section above or below other section.
- 7) To edit a section, click on the plus sign to the left of the section heading to open up that section.
- 8) To edit any of the feature within that section, follow the procedures above in Step 2.
- 9) To add a new section, click on the “Add Section” option at the bottom of the accordion; edit the new section as you wish.
- 10) To delete a section, open that section up and then click on the X at the top right of that section (Note: Be sure to click on the X just for that section, not for a different section or the entire accordion).
- 11) To edit the Contribution Tables within each benefits section, click on TablePress>All Tables on the left side of the admin dashboard
  - a. Click on the contribution schedule you want to edit.
  - b. Edit the text inside the cells within the table as desired.
  - c. To delete columns, click on the checkboxes below the columns you want to delete, then under Selected Columns click Delete.
  - d. To add columns, click on the checkboxes below the columns you want to delete, then under Selected Columns click Delete.
  - e. Using the same method, you can duplicate the selected column or insert a new column before the selected column.
  - f. To add a new column at the end, click on Add X column(s), select the number of columns you want to add, then click Add.
  - g. Rows can be added, duplicated, inserted, or deleted using the same method
  - h. Click Save Changes.
- 12) To create a new contribution schedule, go to TablePress>All Tables on the admin dashboard
  - a. You can copy an existing contribution schedule, like the Medical one if you had a second medical rate table to enter.

- b. The Copy function is located under the contribution schedule name, just hover over it and click Copy.
- c. You can also add a new blank table by clicking Add New at the top, then specifying the name and number of rows and columns, then clicking Add Table.
- d. To enter the new contribution schedule/table into a page, copy its shortcode [table id=<ID> /] and paste it into the desired page in a text block, replacing the ID with the table number.
- e. The shortcode can be found at the top right of the contribution table editing screen, just click on the contribution schedule name on the All Tables page to see it

13) Once all changes have been made to the Benefits page sections, click on Update at the top right.

## Phase 4: Logins/Classes/Roll Out

### 1) Add a new user

- a. In the admin dashboard, click on Users>All Users.
- b. Click on Add New at the top.
- c. Under Add New User, enter the new username (cannot be the same as any other users in this site).
- d. Enter their email address (again, cannot be the same as any other users in this site).
- e. Leave Role as Subscriber, or change to Administrator if they need to have access to make changes to the site.
- f. Check the box next to "Skip Confirmation Email."
- g. Click Add New User.
- h. Click on Users>All Users again and then click on the new username.
- i. If the new user is not an administrator, uncheck the box next to "Show Toolbar when viewing site."
- j. At the bottom of the page, click on Generate Password, and copy and paste this somewhere safe.
- k. You can enter in a password on your choice, and it will make you check the box below to Confirm use of weak password if it is not a strong password.
- l. Click Update User.

### 2) Add an auto-login URL

- a. In the admin dashboard, click on Users>All Users.
- b. Click on the user you want to add the auto-login to (Don't add an auto-login to an admin user, only to a subscriber).
- c. Scroll down to the bottom of the user's profile page, to Auto-login.
- d. Click on New, then click Update Profile.

- e. Copy the URL that was generated, and that is the new auto-login URL that can be given out to the customer to bypass the login screen.

## Portal Images Help Sheet

The BenefitsEASY platform has preferred size for each image location that will ensure it looks the best on the portal. If you see an image looking cropped or distorted in any way – use the steps below to resize the image to the optimal dimensions.

The BenefitsEASY system will allow you to resize an image after uploading to the Media Library.

1. Open the Media library and select the image.
2. Under the image choose EDIT IMAGE.
3. At the top, In the New Dimensions area, change one of the numbers and notice the other will adjust to maintain the correct look and feel of the logo.
4. Hit the red SCALE button to save your changes.

Here are the recommended image sizes:

- **The default logo displays at 270 x 68 pixels.**
- **Homepage banner / Hero image: 1920x768 (under 200kb)**
- **Employee Help Desk on Homepage: 240x70**
- **HR Resources / I'm New image on right: 768x585**

## Contact eTekhnos support for the following tasks:

- Setting up multiple classes with different pages assigned to each class
- Setting up a custom web address

eTekhnos support: [support@etekhnos.com](mailto:support@etekhnos.com)