RLI Chapter Website Manual

Congrats! You've made a great decision to invest in an RLI Chapter Website. This is a huge step towards harnessing the power of the RLI brand, growing your membership, and better serving your members.

Definitions

- **Frontend**
  Refers to the part of the website that users see when they visit your website page.

- **Backend**
  Refers to the part of the website only approved admins and leadership may see which integrates with the RLI National Database.

- **Chapter Region**
  Refers to the membership area your chapter covers. For example, the Florida Chapter's Chapter Region would be Florida and the Carolinas Chapter's Chapter Region would be North Carolina and South Carolina.

- **Wordpress**
  Wordpress is the free publishing software and content management system (CMS) on which you will be managing your website. Wordpress is widely considered easy to use and is the CMS of choice for almost 75 million websites—including yours!

- **Website Administrator**
  Any user from a chapter that has access to the backend side of the chapter site. These can be either an authorized chapter administrator or leadership member.

- **Search Engine Optimization (SEO)**
  The process of maximizing the number of visitors to a particular website by ensuring that the site appears high on the list of results returned by a search engine.

Support & Help

- **Here are a few helpful (and free) resources** to learn the platform and get your questions answered:
    - WordPress Codex: https://codex.wordpress.org/
    - WordPress TV: http://wordpress.tv/
    - Check out the WordPress For Beginners section on this page: https://codex.wordpress.org/WordPress_Lessons
- **If your issue is related to backend functionality**, you may contact Jessa Friedrich, Marketing Manager, by email at jfriedrich@realtors.org to schedule a time to discuss.

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- **If your issue is related to frontend functionality** and you are working on editing, updating, or creating new pages or content for your website and have questions, there are multiple resources available to you. Here is a step by step guide to finding the answer:
    1. Check the WordPress Forum. Your website is built on a platform called WordPress and your theme (template) is called Enfold. WordPress is one of the most widely used website building platforms around which means if you have a question, there's a good chance so has someone else!
    2. Google it. This sounds obvious but there really is a good chance the question you have has been asked before and we all know that Google knows all. Simply type in "WordPress Enfold theme + your question." You can also add the term 'YouTube' to this search and there is usually a tutorial video available, too.
    3. If you still can't find an answer OR if your issue is related to backend functionality, you may contact Jessa Friedrich, Marketing Manager, by email at jfriedrich@realtors.org to schedule a time to discuss.

Website Content Management

For questions on anything provided in this section or for additional ideas, please contact the RLI Chapter & Membership Relations Manager. Make sure to read through the 'Helpful Tips' under each section to enhance your chapter's marketing efforts!

Getting Started

You are working in what is called a staging website. This site is not live to the public and is only visible by you – the website editor. Do not share this link or promote it publicly anywhere. And don't worry about breaking anything or messing anything up, it is just a staging site so we have plenty of time to make adjustments before the site goes live at a time of your choosing.

Note: You will notice that most of the site information is defaulted to the RLI Carolinas Chapter. This is because we used them as our first example to create the template for all other sites. This section will show you how to update the site name, logo, and social sites to reflect your chapter's information. You will also need to update the page content on each page to do this as shown how to in the following section.

Once you have access to your staging site, please let Jessa (jfriedrich@realtors.org) know the following, if you have not already:

1. Does your chapter have dues?
2. Do you plan to take payments for courses, renewals, and/or new member applications through your new website?
3. If so, do you have a Stripe payment processing account yet? If so, please give Mike your login credentials.

Here are the very first things you will need to do when you first start editing your website. To complete the below, please login to your staging website using the link (ie. https://rli-arkansas.yourstagingwebsite.com/wp-admin/) and credentials provided.

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- Changing the site name
    - On the left side bar navigate to Appearance>Customize>Site Title. Then add your chapter name (ie. RLI Arkansas Chapter). When you are done, hit the blue 'Publish' button above. Then return to your main dashboard page (ie. https://rli-arkansas.yourstagingwebsite.com/wp-admin/)
- Changing Your Chapter Logo
    - On the left side bar, select Enfold Child. Under the first section, 'Theme Options' you can change your logo under the 'Logo' section on this tab by clicking the blue 'Upload' button (see image below). Once the media library opens, you will need to upload your RLI Chapter logo from your computer. Once uploaded, select the blue 'Use Image as Logo' button in the bottom right. Then, click the blue 'Save All Changes' button on the 'Theme Options' page.
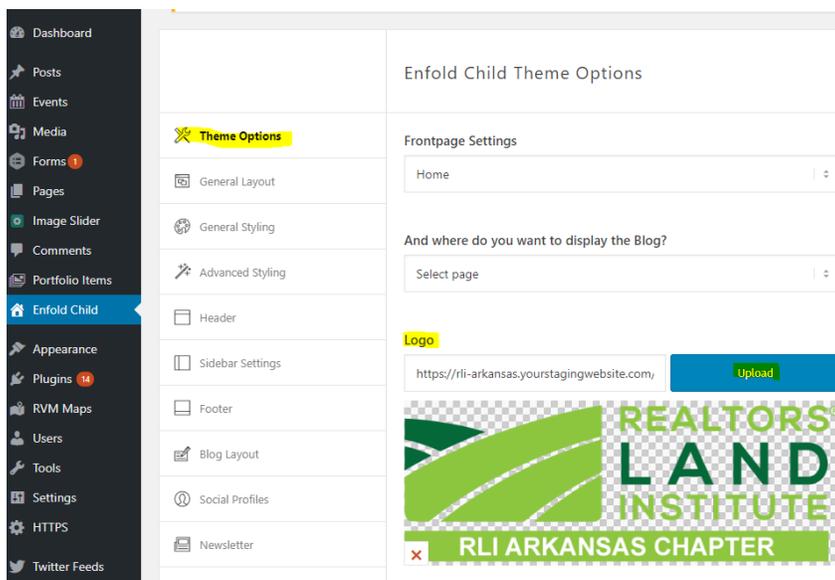
- Adding your social media profiles.
  Note: If your chapter does not have its own social media profiles, you may skip this step and it will default to the RLI National social media pages.
    - While still under the Enfold Child section, select the 'Social Profiles' tab (see image below). Complete the information as needed to update with information navigating to your social sites. From here you can also add or remove social sites using the green + or red – buttons next to each. When you are done, click the blue 'Save all changes" button.

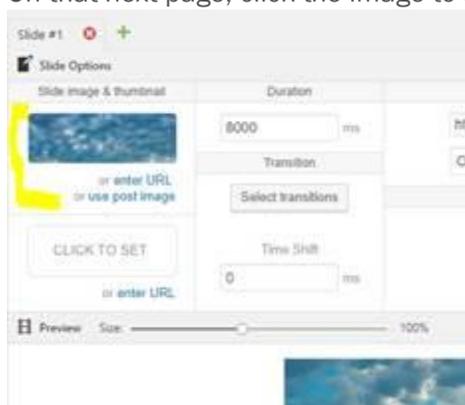<p align="center">**"The Voice of Land"**</p>
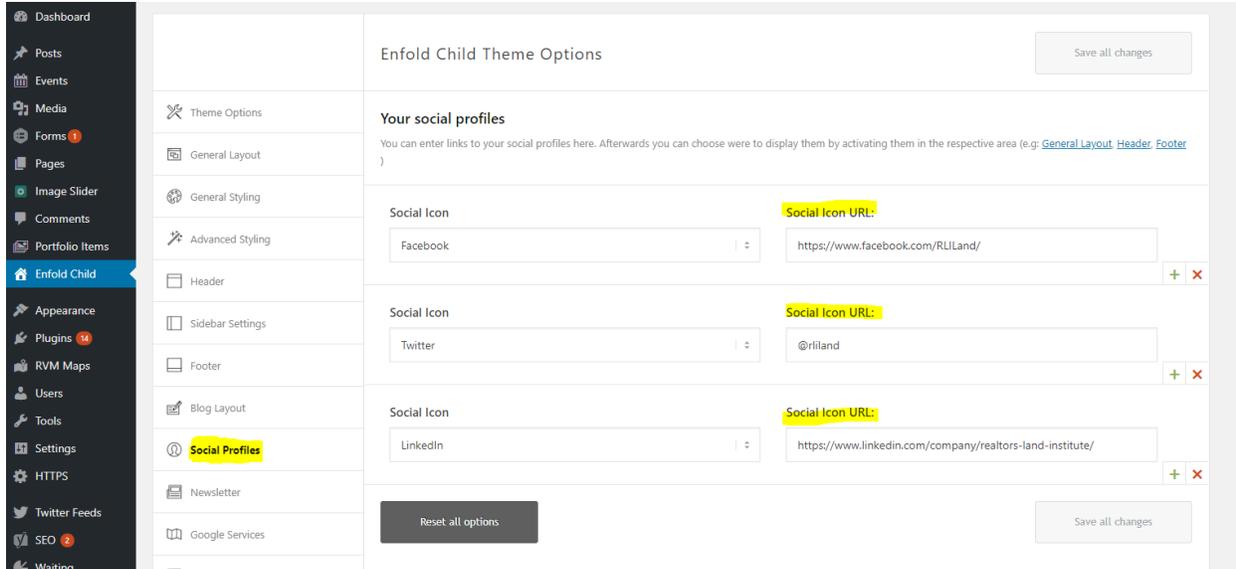
- You will also want to update your menu structure. See instructions under the next section. You can wait to do this until you have completed updating all of your pages and know which you will be keeping and which pages you will be deleting. For example, some chapters do not have blogs, so they would want to delete the Blog page from the Menu structure.

Next, you will need to decide which pages you want or don't want on your website. Then, you'll want to start editing the content of your pages to be specific to your chapter. The next section walks you through updating your website content.

- Changing you WP Advanced Image Slider images on the Home page
  - When editing the Home page click "Edit Layer Slider here'. This will open new tab/page where you can edit the layer slider image.
  - On that new page that opened, select the below slider to edit:

  - On that next page, click the image to select a new one (see highlighted below):

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- Select the image and click save.
- Then close that window and switch back to the edit Home page tab and click the blue 'Update' button there.

Updating, Creating and Managing Page Content

Your site came with prepopulated website content on all of its pages. However, you will need to update the content to make it more relevant to your members. You may also find you need to create additional pages. This section will provide you the knowledge and tips to update and create page content.

- How to edit and create pages
  - Read this page to gain familiarity with how your website pages work and follow these instructions to start editing your pages: https://codex.wordpress.org/Pages
- Uploading, Using, and Sharing Media Files (ie. images and documents)
  - On each page you will have the option to 'Add Media' and upload images. It is suggested that you add Alternative Text to each image describing what it is for SEO Purposes (ie. 2018 RLI Arkansas Chapter Fall Meeting; or RLI Arkansas Chapter Logo).
  - You may view your image library by navigating on the left hand side menu to 'Media' and then 'Library'.
  - Helpful Tips
    - The slider images for the homepage are 1770x470px. You can easily edit images to this size using the free Canva.com image editing software and putting these into the custom dimensions fields.
    - Find royalty free, no-cost images for your site on www.pixabay.com or use photos you or a member has taken. Always download the largest file size so the image is high enough resolution to look professional on the website. **Note: Only use photos you have permission to use on your website.**
    - Each image you upload has its own link which can be used to share it/use it. For example, if you upload a course flyer, you can open it in the media library and grab the link by clicking the text and doing a crtl+a on the keyboard to select all for the whole link. Then you may use that link in emails to share the flyer.
- The Education/Upcoming Courses Page
  - This page is set up to automatically populate with upcoming RLI National Course and your chapter's upcoming courses once they have been submitted and approved by National.
- Helpful Tips for Website Page Content
  - TIP: Anywhere you see testimonials is a great opportunity to customize the site to your chapter. Reach out to your leaders or members to get testimonials to add to these pages. Make sure to get a high res headshot from them to upload and add next to their testimonial.
  - TIP: Make sure to keep page content up to date and regularly review your pages for accuracy of information.

- o TIP: On each page, add links to other pages on your website and on National's website to help your Search Engine Optimization (SEO). For example, if your page reads, "The REALTORS® Land Institute offers the Accredited Land Consultant Designation..." Hyperlink 'Accredited Land Consultant Designation' to the page on National's website that talks more about earning the designation.
  - o TIP: Boost your SEO! On the page where you create the website page, make sure to update the 'Yoast SEO' section at the bottom of the page. Here is some additional information that can help you use Yoast to boost your SEO: https://moz.com/blog/using-yoast-seo-for-wordpress#usingyoast
  - o TIP: Update all of the testimonials and images on your site to be those of your own chapter members.
- Hide a page or blog post from public
  - o For example, if you do not yet have posts on your blog page yet, you can follow these steps to hide the Blog page from the public:
    - ▪ Navigate to the page in the 'Pages' tab and open the page for editing.
    - ▪ On the right side of the page, under the 'Publish' section, change the 'Visibility' from 'Public' to 'Private' and click the blue update button.
    - ▪ Then, if needed, make sure to also remove it from your Menu if it is on your main menu by going on the black left sidebar under 'Appearance' and selecting 'Menus'.
- How To Update Your Site Menu/Navigation
  - o To update what shows up on your websites main navigation, or menu, bar, on the left side select 'Appearance' and then select 'Menus' from the pop out (see image below).
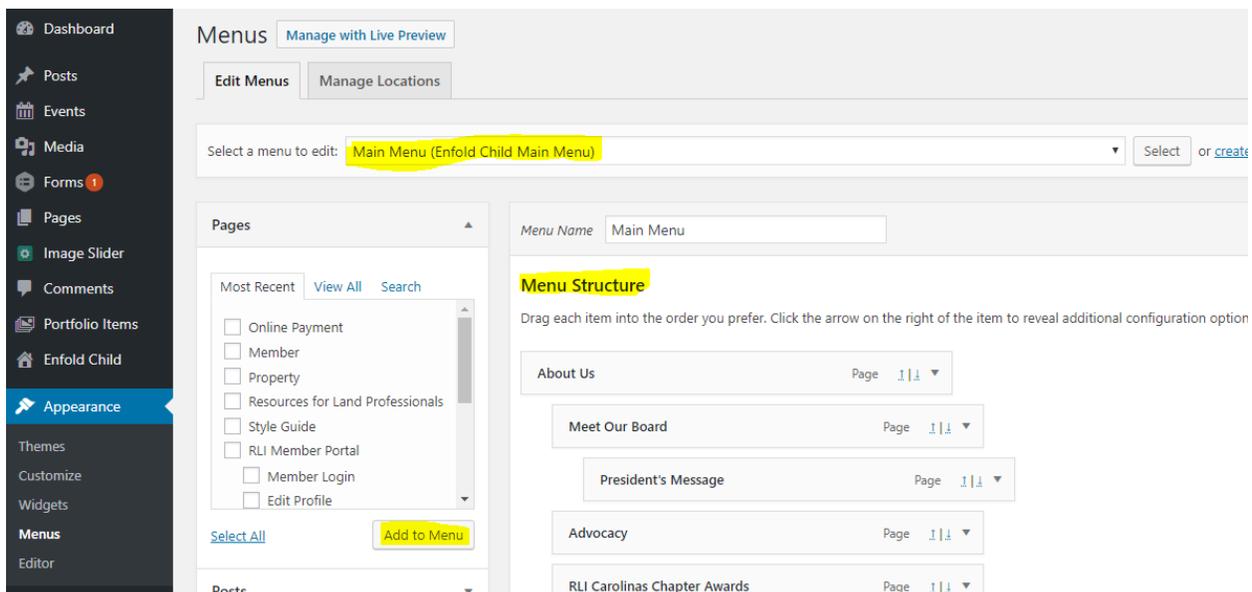
- ▪ Add/Remove Pages from Menu
  - • On this page, you can add or remove different pages from your menu navigation under the 'Menu Structure'. To the left you will see a box where you can find pages to add to your menu, when you click the check box next to one and hit the 'Add to Menu' button it will be

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added under the Menu Structure section and you will need to drag and drop it wherever you'd like it show on the menu navigation (see section below on structuring your menu).

- ▪ Rename Menu Navigation Pages
    - • You can rename these to make them simpler for viewers to understand. To do this, expand the menu option next to each page you want to rename using the v down arrow to its right.
- ▪ Remove Menu Navigation Pages
    - • To remove a page from your navigation, expand the menu option next to each page you want to rename using the v down arrow to its right. Then select the red 'Remove' hyperlink.
- ▪ Structuring Your Menu
    - • Take note that there are different levels of the navigation so you can have main, or what are called 'parent', navigation pages (ie. About Us) and sub-navigation pages, what are called 'child', navigation pages (ie. Meet Our Board). To make a page a child under a parent, you would drag it under the parent you want it under and move it slightly to the right so it is indented under the parent on the Menu Structure.
- ▪ Make sure to click the blue 'Save Menu' button in the top right of the Menu Structure section after making any changes to the menu structure.

The Blog Page

Your new site comes with the option to host a chapter blog. RLI National strongly encourages all chapters to publish regularly on their blog. This section will outline the benefits of hosting a blog and provide you the knowledge and tips to create blog posts.

- • Why spend the time to manage an active blog? Adding fresh content to your site regularly does the following:
    - o It is the single best way to boost your ranking in search engine results and keep visitors coming back to your website.
    - o It makes for great content to share on your social media sites and takes visitors from your social sites to your website where they can learn more and, hopefully, join!
    - o It positions your Chapter and members as a local expert resource in the industry.
    - o It provides value to your members and their clients.
- • Where does the content come from?
    - o Ask your chapter members to contribute posts to your blog by sharing their expertise. Have them contribute pieces that are a quick and easy 300-700.
    - o Commit to contributing at least one or two posts per month from the Chapter. Have either and admin or someone in leadership contribute.
    - o Ask an industry service provider to write on a topic related to their business.
- • What kind of content should be included on the blog?
    - o Anything that your members feel would be valuable for their colleagues or clients to know.

- o Anything that your members' clients would find valuable.
- How to create a post
  - o Follow these instructions: https://codex.wordpress.org/Writing_Posts
- Helpful tips
  - o TIP: Check out the RLI blog and other industry blogs to see what topics they are writing on to get inspiration for topics of your own.
  - o TIP: Write about an industry topic from a local perspective. For example, have a member describe how they've used 1031 exchanges in your Chapter Region. The more local / regional content you produce the better chance of increasing your SEO and attracting local agents to join your chapter and discover RLI. What problems do agents in your area face? Provide helpful blog posts addressing common issues or hot topics.
  - o TIP: At the end of a member's post, link the Author Bio to their chapter 'Find A Land Consultant' record page.
  - o TIP: Link any related upcoming courses, pages, blog posts, or resources on your site to keep them engaged.
  - o TIP: Let the author know when their piece is posted and encourage them to share it on their social sites.
  - o TIP: Use images (try sourcing free ones from www.pixabay.com). Using images will help your Search Engine Optimization (SEO) so you come up higher in search results.
  - o TIP: Boost your SEO! On the page where you create the post, make sure to update the 'Yoast SEO' section at the bottom of the page. Here is some additional information that can help you use Yoast to boost your SEO: https://moz.com/blog/using-yoast-seo-for-wordpress#usingyoast
  - o TIP: On each post, add links to other related posts/pages on your website and on National's website to help your Search Engine Optimization (SEO). For example, if your post content reads, "The REALTORS® Land Institute offers the Accredited Land Consultant Designation…" Hyperlink 'Accredited Land Consultant Designation' to the page on National's website that talks more about earning the designation.

Membership Management

Before proceeding, make sure to login to the backend of your chapter website by visiting https://www.rliland.com/wp-admin and using your login credentials. If you need your login credentials contact the RLI Chapter & Membership Relations Manager.

Managing Member & Prospect Records

- Manage member records.
  - o Add fields to all chapter member records to better keep track of chapter specific information.
    - Navigate to 'Admin'
    - Under the 'Member Custom Fields' tab, click the 'Add Field' button.
    - Complete all information and click the 'Add' button

- o Update a member's National record information including, email address, company name, phone numbers, business address, add notes, and more.
- o View your members' 'Course History' tab in their records.
- o Add/process a new chapter member without paying through the new member application form.
  - ▪ Logout of your chapter website as an admin.
  - ▪ Take the New Member Application Form on the front end
- o Add/process a new chapter member without paying through the New Member Application Form.
  - ▪ Add the "new member" as a prospect.
  - ▪ Select the "Mark Active" button in their record under their profile image field.
- • Manage prospect records.
  - o Add new prospects to the database.
  - o Pull lists of prospects in your Chapter Region from the National Database.
  - o View record information about courses taken and contact information.
- • Helpful Tips
  - o TIP: Use your member's 'Course History' to target them in emails for upcoming courses that are either similar to what they have taken in the past or to invite them to courses they have not yet taken that you are hosting. You can also use this information to see how close you members are to completing their education requirements towards the ALC so you can encourage them along the way.
  - o TIP: Use prospect lists to target your emails and extend your reach.

Managing Chapter Dues

- • Define your chapter's annual dues rate.
  - o Navigate to 'Admin'
  - o Under the 'General' tab, define your 'Yearly Membership Dues' in the text field using only numerals (ie. 175.00).
- • Create batch invoices based on expiration date
  - o If using the new website to create invoices, dues invoices will automatically generate at a defined time based on their expiration date.
- • Create an ad hoc invoice
  - o Go to the member's record for which you plan to create an invoice.
  - o Click the 'Add Invoice' button and define the 'Invoice Type'
  - o Enter all information
  - o Click the 'Add Invoice' button
- • For how to email dues notices to your members, please refer to the 'Chapter Management' section under 'Sending Emails.'

Using Search Functionality

- • Using the 'Advanced Search' functionality
  - o Navigate to 'Chapter Database' on the left-hand sidebar of the backend after logging in as a Website Administrator.

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- o Select 'Search Database'
  - ▪ Here you can either do a simple search for a specific record by typing in the users first and/or last name
  - ▪ OR you may do an 'Advanced Search' (this is how you can pull/export lists; see the next section for more information on how to pull/export a list).

Pulling Lists of Members/Prospects

- • What lists can I pull?
  - o Pull lists of prospects or new members at National in your Chapter Region.
  - o Pull lists of your current chapter members and/or prospects.
  - o Pull specific lists through the 'Advanced Search' feature.
- • How to pull lists with the 'Advanced Search' feature
  - ▪ Start by selecting the 'Search Criteria' dropdown;
  - ▪ Then, one at a time, select the criteria from the dropdown which you want to search by to get your list. For example, if you want to pull all members that are ALC Designated you would select 'ALC Designated' from the dropdown and then say 'True' in the field that appears. Then, simply hit search. From here you can export the list.
  - ▪ Export your list by selecting all of the fields you would like in the export then hit 'Export Now'
- • Helpful Tips
  - o TIP: Use the lists of National's new members in your Chapter Region to target new Chapter members—invite them to courses and meetings via email or have another member reach out to them on the phone.
  - o TIP: Use National's list of prospects in your Chapter Region to do a membership drive.
  - o TIP: Here are some ideas of how to use exports to improve your communications:
    - ▪ Do an Advanced Search by 'Expiration Date' to start emailing or mailing renewal reminders.
    - ▪ Do an Advanced Search by 'Join Date' to target new members (or old ones) and send emails to engage them or remind them of their benefits as a RLI Chapter and National member—always take advantage of every chance you get to link them back to your website!
    - ▪ Do an Advanced Search by 'Member Classification' to find any Military Transition Program members in your Chapter Region and send them special offers on Veterans Day or any other day!

Education Management

Before proceeding, make sure to login to the backend of your chapter website by visiting https://www.rliland.com/wp-admin and using your login credentials. If you need your login credentials contact the RLI Chapter & Membership Relations Manager.

Adding a Chapter Course

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Chapters are now able to submit a course to National for approval through the backend of the site. **Please note Chapters will need to contact RLI staff and submit their non-refundable deposit (to be deducted from their course royalty fees) before a course may be approved.**

- To submit a course, please follow these four easy steps:
    - Step 1: Navigate to 'Courses'
    - Step 2: Select 'Add New+'
    - Step 3: Complete all information*
    - Step 4: Click the 'Add' button

Adding/Managing a Roster

Once a course has been moved from the 'pending' state to the 'approved' state, a chapter may import a roster and manage registrants.

- Creating a roster of registrants
    - Navigate to 'Courses'
    - Click the 'Roster' button next to the course to which you plan to add registrants.
    - From here you may either
        - import an Excel roster using the standardized template
        - OR 'Add Member' using the search function at the top.
- Updating a roster of attendees
    - How to remove a registrant.
        - Registrants cannot be removed from a roster. However, admins may change their 'status' on the roster to 'deleted' by clicking the member's current status in the field in the row of their record in the 'Status' column.
    - How to record grades after the exam.
        - In the roster, hover over and click the text in the 'Score' column's field next to a member for which you want to enter a score and enter the score. Do this for each member.
- Helpful Tips
    - You may also make notes for each registrant the same way in the column labeled 'Comments'.

Chapter Management

Before proceeding, make sure to login to the backend of your chapter website by visiting https://www.rliland.com/wp-admin and using your login credentials. If you need your login credentials contact the RLI Chapter & Membership Relations Manager.

Managing Chapter Member Records

- Chapters are responsible for keeping their member's records up to date. One of the most important updates chapters need to make starting out is marking all of their chapter members as active chapter members in the database. There are two ways to do this:
    - Manually

- Login to the backend of your chapter website by visiting https://www.rliland.com/wp-admin and using your login credentials
- On the left side of the screen in the black menu bar hover over 'RLI Chapter' and on the pop out menu select 'Search Database'
- On the search page, type the name of the member you would like to add/update the profile of and click the tab in their member record labeled 'Chapter'
- In the 'Chapter' tab, under the Chapter Membership Data section, click the 'Add New+' button and fill in the information requested, then click 'Add'
- Repeat these steps for each member in your chapter. If applicable, please also add them to the next section labeled 'Chapter Board Members' where you can track their position and years of service.
  - Via CSV import
    - Coming soon!

Sending Emails

- Email integration. Chapters are now able to email their members using database information to define lists by opting to integrate their MailChimp accounts with the new database. To take advantage of this option, please let Mike know you are interested.
- Triggered emails. Through the database, chapters can set up triggered emails to go out. Examples of triggered emails include welcome emails when a new member application is approved; confirmation emails when a purchase/payment has been made; etc. To take advantage of this option, please let Mike know you are interested.

Chapter Admin Resource Page

- Chapters now have easy access to all templates and flyers from National.
  - When you login to the database, all Chapter Website Administrators can access the new 'Chapter Leader Resources' page now available at http://www.rliland.com/members/chapter-leader-resource-page
    - If you are logged into the database, simply hover over the 'RLI Chapter' option on the left side navigation bar and then select 'Chapter Leadership Resources'

Policies

National Database Information Protection

- Chapters are expected to adhere to the guidelines provided in this section of the Chapter Website Manual as laid out by RLI National. By utilizing the functionality provided, chapter leaders implicitly accept the below terms and conditions.
  - **Chapters are not permitted to sell, share, or disperse *any* information**, especially member or prospect contact information, accessed in the National database with third parties, including, but not limited to, members and their companies, partners,

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and industry service providers. Lists are provided with the expectation that only Chapter leadership and designated admins use this information to contact members of their chapter and prospects within their Chapter region in adherence with these guidelines.

- To prevent overwhelming prospects and RLI members with promotional email communications, chapters should not send mass emails more than once a week.

Website Branding

- Chapters are expected to adhere to RLI's Visual Standards Guidelines when using the logo, writing content, and creating marketing materials; this includes for the website and digital communications. Templates for flyers and PowerPoint Presentations are available on the Chapter Resource Center page of the website.

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