

GrassRootsWeb.



**Web Design
the GrassRootsWay.**

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Overview

Welcome – we couldn't be more excited to have you getting started on a project with us! This document is meant to help you design fantastic websites easily, efficiently, and for free. It is also here to provide a guide for how to engage with clients in the GrassRootsWeb way.

Most of this guide will have been covered in our training, but following this document along should mean you don't have to keep everything in your head!

I have never come across a guide like this – there is so much information out there to help you with web design, but finding the most helpful stuff can take a while. This guide is by no means exhaustive – a key part of web design is solving issues, and Google will always be there for you as it was and is for us.

Lots of luck with getting started at GrassRootsWeb, and if you ever have any questions, just give us a shout!

- The team at GrassRootsWeb

Useful resources

Wpbeginner.com – is a great site with long articles talking you through setting up most plugins, softwares, etc.

Google – an answer to every question is on Google. Some of the first things you click on suggest using CSS in order to sort a functionality, but this is rarely actually required – there is usually a plugin/ workaround for everything.

[fontspace](#) – download custom fonts where the elementor ones fall short of your client's needs

[JPEG to SVG online file converter](#) – good for making icons – e.g., adding a jpg logo/screenshot to header

[Canva - icon maker](#) – can be useful for designing a logo. Also, PowerPoint. If you get free month trial can download with clear background, which is v useful

[stock images](#) – Unsplash.com stock images are great and free. Canva has some good stuff too, but I always start here

[How To Make an Elementor Website Load Faster](#) – good for site speed optimisation. Don't feel you need to follow everything!

[WooCommerce Payments - WooCommerce.com](#) – best ecommerce plugin

[Free Online Image Crop & Resize Tool | Mediaviewer](#) – resizing (in terms of pixels) is useful for custom loading speed work

[Elementor WordPress tutorial](#) – get back to basics in using elementor and envato elements if you missed the taster session/ need a refresh

[GiveWP plugin](#) – the best donation plugin. Standard version takes a 2% cut on top of standard PayPal (2.9% + 20p) or Stripe (1.9% + 20p) payment fees. If you pay about £50/year, you can avoid this additional 2%. Check out [12 Best WordPress Donation and Fundraising Plugins \(2020\)](#) for alternatives, though in our experience, that one really is the best

Initial Preparation

Your personal domain and server (Free)

30 mins

Don't use the training servers! They're very likely to mean your work gets irretrievably lost

Good for providing mock-ups before client's server has been bought, also for practicing with plugins and WordPress

- Create a free account at <https://infinityfree.net/>
- Login to your control panel by clicking the login link from the client area (might be under accounts > manage).
- Find and click on Softaculous Apps Installer from the control panel (under software section) – this may say something went wrong, please try again in 20 – try a few times at 10/20-minute intervals and it should work
- Click WordPress.
- Leave most of the setting on the page. Set and note down your admin account login details (use the same ones as for infinityfree) and site name. Scroll to bottom of page and Click Install Now.
- Click admin website link (domain.epizy.com/wp-admin)
- This will take you to WordPress dashboard - bookmark this page.
- Install and activate "Elementor website builder" + "Envato Elements – Photos & Elementor Templates" plugins (plugins in black left bar > add new)
- Install and activate Ocean WP theme (Appearance in black left bar > Themes > add new)

If you get logged out, you will need to use the second set of login details to get back in.

NB As a free provider, this service has limits on the amount of data your website can have on it. If you exceed these limits (which you will not be warned about), your account will be frozen and you will lose everything on it. As such, I recommend keeping the number of pages on this account low – if using it to create templating options for clients before they have their own servers, delete your old pages you are no longer using – being frozen out is super annoying! Also install updraftplus plugin and back up your work (see back up your work section). This way if you do get frozen out you can restore your site on another account.

Plugins

Preinstalled (if using Bluehost), keep

- **Bluehost**
- **Google Analytics Monsterinsights**
- **WPForms Lite**

Use right from start

- **Elementor**
 - o Absolutely essential – use for all editing pretty much
- **Envato Elements**
 - o Loads of free templates – never make a page from scratch! It'll look bad and take forever
- **UpDraftPlus**
 - o Use it to regularly back up your work separate to your host – save it on a google drive/ equivalent
 - o If your host shuts you out, etc, this way you can restore the backup
- **Smush**
 - o Compress images, use it from the start
 - o Lazy loads images, improves page speed
 - o Make sure to set up in settings
- **Sticky Menu, Sticky Header (or anything!) on Scroll (or ocean sticky header extension)**
 - o Enables header to stay stuck at top as most proper sites have. To make it work, go onto settings > sticky menu – then put "#site-header" into "sticky Element" box. That should do it.

Use at End

- **WP Super Cache**
 - o Good tool for caching, use <https://www.wpbeginner.com/beginners-guide/how-to-install-and-setup-wp-super-cache-for-beginners/> to set up once site is nearly done
- **GDPR Cookie Consent (CCPA Ready)**

Might be useful

- **Popup maker**
 - o Useful for subscribe buttons
- **Smart fonts for Elementor**
 - o Way to integrate custom fonts
 - o <https://WordPress.org/plugins/codevision-elementor-smart-fonts/>
 - o Only accepts .ttf file fonts – you can convert your font file into this online
 - o Upload .ttf in settings, then search name of font in elementor editor under typography
- **Woocommerce**
 - o If the client needs a payment gateway, this is the one to go for
- **Styler for WPforms**
 - o Means you can customise look of WPforms

NB – Plugins are great, and enable you to have loads of functions on your website. However, too many slow the site down, so *deactivate and delete any unused ones at the end of the project!*

Footers

Please be sure to make your clients aware that at the end of the project you will be attaching a footer to their site that reads “Made by GrassRootsWeb”. Please phrase this as a question and be respectful but highlight that it is your intention to them. This allows GRW to claim its role in the creation of this website and advertise its work so that we can continue to support more charities or small businesses like them and train more volunteers for free.

To do this please upload the image that will be provided below and add a link to the image which should be the GrassRootsWeb homepage link; <https://grassroots-web.com/>

The image link is: <https://mcusercontent.com/cba7f47218f5aaa98c18c1e3b/images/6b0c252f-fab7-095c-29e1-4928b89c643b.png>

And should appear like this:



Getting Started with a Client

There's more to being a great web designer than being technically gifted. At GrassRootsWeb we pride ourselves on how we blow away clients from our very first meeting – and this comes down to the professionalism with which we run our client meetings. Here's how to wow them.

Your primary objective is to maximise the value you are contributing to the client. You need to make this clear to yourself and the client right from the start.

You achieve this by:

- Working with the client to develop an idea of what they want,
- Understanding this and refining this thoroughly
- Executing on this understanding
- Continually refining your work to better match client desires

Principles

- Put the client first – see above
- Lead – don't wait to get asked or told what to do – come to a meeting with a plan of the next steps (which can always be revised), a plan of what needs to be gone through in the meeting, etc.
- Be independent – most issues in web design can be fixed with enough googling and free plugins – you can fix it!

Keep in mind – whilst you have/are building the site, it is always their site! You have responsibility to make it amazing, but it is ultimately about what they want to get out of it, not you – you put the client first. When referring to your work together and what you're achieving, it's always a "we" (you + Client), never an "I" that has achieved a lot.

Our way of working - Rapid Revisions

This is the cornerstone to how we work. This means that rather than only showing our work when it has reached a point where we think it is looking great, we continually show it and get feedback on imperfect mock-ups and drafts. This is a highly efficient way of working, known by many as "Agile". Using this method, with under 30 hours of work a fantastic website can be created (see ____ below). This is because little time is wasted perfecting the details of templates that will later be thrown out, for example. This means that we generally carry out an entire client project in a single week, though this can be stretched to fit around your other commitments.

Because we work so quickly, we need to have access to meeting our clients frequently for short meetings to discuss drafts – for example, on the first day especially, up to 4 separate meetings may be necessary (if you and the client are available) to go through introductory information, moodboarding, logos, and landing page templates. It is **important that these meetings are separate** so that the material and ideas you bring to them can be influenced by previous meetings.

As not everyone is familiar with this way of working, it is important to explain this to clients at/before the first meeting, and explaining its value.

How to lead client meetings

Some of these steps may seem obvious or unnecessary – but they come highly recommended.

Set out at the start:

- What you'll be discussing in the meeting
- What you want to have achieved by the end of the meeting
- How long the meeting should take
- Expected next steps

At the end:

- Overview what you've achieved (and not yet achieved) compared to aims
- Next steps on both sides (yours and client)
- Time frame of next step
- Next meeting – when and what it'll be for

Keep in mind – some clients may be very proactive, even dominant, and may not want you to lead the meetings, instead preferring to tell you what needs doing. That is okay – you do not always need to appear in charge.

The below steps are if all goes to plan – in reality, there are constant revisions needed, a client may like none of your templates and you'll have to start that step again. Though sometimes dispiriting, you're constantly gaining experience and understanding of the client's preferences, and at worst you've lost a couple of hours – you've still got an amazing site coming!

Building a Client Website – the process

The following steps are the key milestones in building a website for a client – whilst likely many of them will provide helpful guidance, many issues and needs are likely to crop up which have not been discussed at all here. You're at GrassRootsWeb because you have initiative, and so I have no doubt you will excel in these moments. The gaps in the guide will be filled in on the back of your feedback and experience.

The first proper meeting

Time: 45 mins

There's quite a lot discussion needed at the start for you to do a great job, and warn them of this – first impressions matter, and you don't want to scare them off!

Give an overview of the site building process, and the meetings you will require so they know what to expect. For example:

- Day 1: Intro meeting ft Moodboarding + shortlist sample templates
- Day 4: 4 templates with moodboard content - get thoughts
- Day 7: Landing page + mobile landing page
- Days 8-20: Other pages
- Ongoing revisions as we go through this

Explain rapid revisions way of working.

Then, it is important for you to determine the following by the end of this meeting:

- Function of site – what does the client want to get out of it? Subscriptions? Sales? Follows on social media?
- Audience – who is the audience? B2B? B2C? the more detail you can get the better
- What feelings do you want audience to get out of the site?
- Devices – will audience be using mobiles or desktops more? If mobiles, you should make mobile pages FIRST, as the pages made first always look better, have more effort put into them, etc.
- Content – what do they want to display on their site? In depth textual analysis? Mainly photos showcasing their work? A payment portal?
- Any other specific functions they want out of site
- Style – formal, informal, techy, etc. – If their org was a person, how would they describe them in 3 words?
- Colours – they associate with the brand and they want to be present on the site
- What are their brand values?
- These are a starting point - Ask as many questions as you need to get a thorough understanding of what they want from their site.
-

Keep in mind - the client may not always have a good picture of what they want, and you need to be prepared for this. Work together in establishing values, personality, audience, style, functions. When these are sorted you should have a much clearer picture of what is needed.

Revisions Policy – must make client aware in first meeting

This is noted in the brand consultation form, but not all clients fill this in, and even if they do it is important to mention it!

"It is worth noting that there are two main limiting factors on the time it takes to complete your website.

- 1) The clients and web designers' availability to attend meetings with your web design team which are necessary to progress your project
- 2) How many sets of revisions/additions the client requests the team to undertake

As such, the client is in a large part in control of how long the website takes to build.

To protect our volunteers from projects that go significantly over the initially suggested timeframe, we have a time-limited revision policy.

All requested revisions to a draft website must be submitted to your web design team under 28 days into the start of the project (measured from the date of the first meeting with your team). All our projects are calibrated in such a way that it is very possible for our volunteer designers to have built the website in this time given their time availabilities. As such, this deadline is irrespective of the stage of the website at that point in time.

We note this here solely to encourage the efficient building of your site and protect our volunteers, not to cause any difficulties."

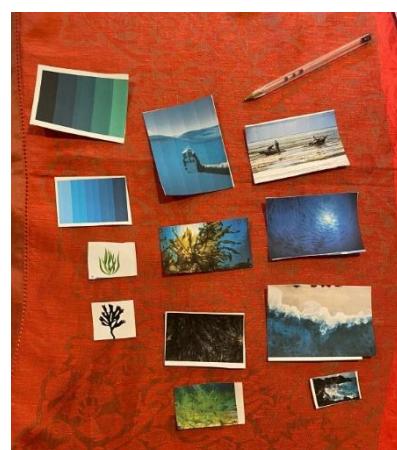
Moodboarding (to do in first meeting)

Time: 2 hrs (mainly pulling together content)

Moodboarding is where we go through potential materials to represent feel and aesthetics of website - images, colours, fonts, icons. Though not all materials will end up in launched site, it helps the client think through what sort of feel they want, and designer to execute on that feel.

It generally makes sense to do the first step of templating (get feedback on template longlist) at the same meeting, saves having to organise loads of separate meetings.

- Based on previous discussion of desired style, find 50+ images (Unsplash.com), 7+ colour palettes, 15+ icons (for logo potentially), and 15+ fonts that you think could be used on the site/ as inspiration for the site.
- Download photos from unsplash in small resolution! They're still very HD, and will load faster
- You will heavily lean on some of this content in the site itself – so the more time you invest in making a big collection to show the client of very diverse content (you can never expect what they'll like), the better your website will end up – great photos are the backbone of a beautiful website
- Ideally, paste them onto a word document and print them out, but if you're working remotely with the client/ don't have a colour printer, use moodboarding software/ Microsoft OneNote
- (e.g., <https://www.creativeblog.com/graphic-design/16-great-tools-creating-mood-boards-91412793>)
- Show the client all your content and tell them to sort it into content they like, are neutral to, and don't like



for their site.

- Put aside the neutral and don't like piles. Depending on how big the liked pile is, ask them to refine it down until you have about 7/8 images, 2 icons, and 2 colour palettes
- Voila – you have your moodboard – this can be changed or refined at any point, but is a fantastic guide for the feel you aim to create in your site in the future.

Templating (do first step in meeting 1)

Time: 2-3 hrs

- Based on discussions of style, personality, etc, + content and feel from moodboarding session, pick 8ish templates straight from Envato elements which you think might be appropriate in terms of feel for site
- Ideally show these to the client. They pick 4ish for you to mock up. Otherwise pick the 4 frontrunners yourself.
- Create 4(+) mock-up landing page templates – this means changing out the images on the site with ones from the photo gallery/moodboard, and changing the titles to something relevant, but little else
- Use your own.epizy.com site to make these pages if client domain/server not yet set up
- Solicit feedback from client on what they like – they can like the font from one template, one section from another, an animation style from one, and an overall feel from another, for example.

Sort domain and server (do in meeting 1 or 2)

Time: 0.5-3 hrs

The sooner you sort this out, the easier life is! Certainly, do it by the end of the templating step.

Use Bluehost as server (unless client has strong preference otherwise) – free SSL, good rates, good integration with WordPress.org

NB WordPress.com is not the same as WordPress.org! You are trained in working with WordPress.org which will enable you to use plugins, and is open source. DO NOT get your client set up on WordPress.com!!!

Suggest client to sign up for 3 years (locks in promotional discount), base package, no addons needed. This is the best value. Make client aware that when they have to renew, it will cost a bit more (£80ish a year instead of £50ish) – this is standard across all major web hosts unfortunately. The more years they pay for upfront, the longer they get the promotional price for.

*****Ask client to sign up using our promotional link – we typically send over this email, enabling us to be 100% transparent with our clients:**

Hiya,

Just sending over a link to the web host we have always recommended to clients, Bluehost. It offers very affordable rates coupled with a very high standard of customer support (unlike other affordable options). It is the officially-recommended host of WordPress.

We will talk you through how to set it up at the coming meeting, and that way you don't get any unnecessary costly features, and everything should go smoothly. That way they can directly build your site and get it live much sooner!

We discovered recently that there is an affiliate program with all web hosting companies which ensures that you get a discount for the first few years you buy of web hosting, and we get a small amount of revenue for referring you. This program is in place at identical rates for all the major web hosting companies, and so does not influence in any way who we recommend as a host.

As such, if you would be kind enough to access Bluehost through our link, we would greatly appreciate it, as it would help contribute slightly (at no cost other than to the hosting company) to enabling what we do.

<https://www.bluehost.com/track/grassrootsweb/>

Best wishes,

Refresher for how to set up Bluehost

Talk client through setting up over the phone, making sure they don't pay for any add-ons they don't really want!

- Click on: <https://www.bluehost.com/track/grassrootsweb/> (be transparent about the promotional link!)
- Go to view plans
- Base plan
- Put in domain they want (or domain they have if they have one already). If they've already bought a domain on GoDaddy and would like to use this one, put that in.
- Put in organisational details, name, etc.
- Pick how many years they want it for (3 recommended!)
- Untick all addons – we can back up their site for free, Bluehost provides a free SSL, etc. So, unless for whatever reason they don't want to be noted as the owner of their domain on the domain registry (in which case buy domain privacy) – I don't really see much point, no addons are advised.
- Create password, which should be shared with the web design team over the phone, NOT written down, by email, etc.
- Follow along next steps, enabling WordPress.org install that pops up, but not paying for any addons (WordPress.org is free).
- You're all set! If you need to access their website as an admin from now on, you can login via Bluehost.

Additional steps

Only needed if they've bought a domain (but not hosting) already.

- Transfer nameservers of domain to Bluehost server: on domain website (e.g., GoDaddy) go onto domain settings > DNS settings > scroll down to change nameservers, then put in nameservers in confirmation email of hosting account (usually ns1.bluehost.com and ns2.bluehost.com for Bluehost). Can take a few days to work once settings are sorted, so wait a bit before troubleshooting.
- Forwards additional domains owned by the client to main domain (if they have spares/ want this (e.g., client1.co.uk forwarded to client1.com))
<https://uk.godaddy.com/help/forward-my-domain-12123> is a very easy explanation for GoDaddy domains. Takes a bit of time to forward so don't worry if pages don't seem to forward instantly.

Transfer site from old domain to new domain

Time: 20 mins

There are multiple techniques. The best is to install updraftplus and restore the files from the old domain into the new domain (see back up your work section!).

If, however, updraftplus isn't working, you can copy and paste each page from one domain to the other with the help of a plugin.

- Install Might Addons for Elementor plugin on both old WordPress account and new WordPress account
- Activate both, and go onto elementor for both
- Right click a section in old domain and press MA copy all
- Make all pages on new domain that you had built on old domain (set to elementor full width, and edit in elementor)
- Add a section in appropriate page of new domain
- Right click and press MA paste all
- This will paste the whole page for you
- The pictures won't transfer typically so you'll have to re-add them in.
- The same goes for the theme, plugins, etc.
- Further details in video tutorial here: <https://mightythemes.com/cross-domain-copy-paste/>

Logo Design (if required)

Time: 1-2 hrs

- Use Wix logo maker to make lots of suggested logos around name of client
- Use personality, style, etc. words from client discussion to help direct algorithm to suggest what is appropriate
- Screenshot a few pages of the options
- Show the many options to client, suggest they circle their favourites and what they like about them
- Use PowerPoint (or more advanced software if you have it) to try to make options of logos based on these discussions.
- Show to client, and keep iterating until they're happy – the logo matters

- 4 final logos are often necessary – with and without the company name, and on a dark and light background (e.g., black vs white text)
- Use .SVG files to create logo – that way they have no background and can change colour, etc. on PowerPoint (if image desired on logo is a JPEG, etc, convert to SVG online before transferring to ppt)
- Reupload icons/ screenshots thereof to SVG converter online to turn them into true icons. Can change colour of SVGs online afterwards using free tools if needed.
- Save logos to photo gallery for website – you'll be using them a lot

Back up your work!!!

Time: 20 mins

Losing your work is very upsetting and can lose you so much time... don't let it happen to you!

- Install updraftplus WordPress backup plugin
- Go onto settings > updraftplus
- On updraftplus page, click settings tab. Click choose your remote storage, and set that up! (I recommend google drive).
- Return to backup/restore tab. Click backup now.
- Check that you can find the backup on your google drive! This is really important – if you can't, you probably haven't set up remote storage properly. This will mean you won't be able to access your backup files in the event of a server crash (and you'll lose all your work).
- If WordPress does somehow get uninstalled, your host blocks you out, etc. all you have to do is reinstall this plugin and restore everything you backed up.
- When building your site, BACK IT UP DAILY! This will mean you can only lose up to a day's work if the server blocks you out (which on the free servers it will very soon).
- If you're struggling to set it up using those steps, this tutorial makes it clearer: <https://www.youtube.com/watch?v=MZCmAZ8rnMk>

Site Structure + Menu

Time: 0.5-1hr

- Flow chart from landing page(s) towards rest of site – where does it make sense to have parent pages/subsections, what will menu look like, etc.
- Then build menu (Appearance > menus)
- Designing menu is done in customiser (appearance > customise)
- **To make menu/header look how you want, you'll need to install the OceanWP theme! (appearance > themes)**

Make draft template landing page

Time: 3 hrs

- Using feedback from templating session, create a single landing page that fits with their feedback.
- If they don't have specific content ready to fill in (most don't), leave it as dummy text, but have an idea of what sort of thing will go where
- Keep refining this before making lots of other pages – otherwise will have to go through and change font, spacing, etc. of 10 pages which isn't good

- Think & discuss with client – what do they want audience to do on seeing page?
- You can use your own epizy.com site to make this page – then when domain and server are ready, import template (export from one onto computer in elementor, then import into the next) (but this is not recommended)
- Remember key design principles! Focus, clarity, white space, consistency, and alternation

Consistency part 1

Make a document which lays out the specifications you'll be using for your style, and make sure that all parts of the website match these across all pages!

Text

Headings

- font family (e.g., Arial):
- font size Desktop:
- font size Mobile:
- font colour: #_____
- any other details (e.g., italics)

Subheading

- font family (e.g., Arial):
- font size Desktop:
- font size Mobile:
- font colour: #_____
- any other details (e.g., italics)

Body text font family (e.g., Arial):

- font family (e.g., Arial):
- font size Desktop:
- font size Mobile:
- font colour: #_____
- any other details (e.g., italics)

Buttons:

- font family (e.g., Arial):
- font size Desktop:
- font size Mobile:
- font colour: #_____
- background colour: #_____
- border colour: #_____
- border radius:
- padding within buttons (e.g., 20px top and bottom, 50px left and right):

Images

- border radius:
- border specifications (if relevant):

Sections:

- Content width (e.g., boxed at 1000px width):
- Shape divider (e.g., mountains height 30, width 150):

Other:

- Other relevant colour codes (e.g., colour of header, of dividers, etc.)
- Note any other relevant bits!

Make draft template landing page for another device

Time: 1-2 hrs

- Duplicate all the sections from your existing landing page
- Under responsive mode, select one set of sections and say “hide on mobile”, and on the other set, “hide on desktop + tablet”
- Then modify the other set as you wish, they can now be modified completely independently of one another
- For mobile, remember – not too much text, everything vertical, large text, icons, make it as engaging as possible!

Settings to Sort (generally)

Time: 5 mins

- Appearance > Theme > add new > OceanWP > install & activate
- (For each page): Pages > quick edit > template > elementor full width > update
- Settings > reading > your homepage displays > a static page, pick homepage
- Settings > reading > discourage search engines from indexing this site (put on at start, don't forget to remove at the end)
- Settings > permalinks > common settings > postname (makes URLs legible)
- Appearance > Customize > general options > page title > style > hidden
- Appearance > Customize > top bar > general > disable top bar
- Appearance > Customize > site identity > put appropriate site title
- Appearance > Customize > site identity > put logo as site icon (needs to be in PNG (backgroundless format – convert here if not yet converted jpg2png.com)).

Make other pages

Time: 4-8hrs

- Create a footer (e.g., contact us) section that you copy paste into every page consistently
- Header/ title section should be consistent/ have a few types, but not random – again, if you copy paste and change the text it will help it look consistent

A page should always lead a user somewhere – e.g., a button to another page after reading that page's content. Pages shouldn't be put in randomly, but should have a purpose, and a clear intended action.

Mobile version pages/ desktop version pages

Time: 3-5 hrs

- Duplicate all sections of a page on elementor

- For each section, edit > advanced > responsive > hide on mobile for one set, hide on desktop+tablet for the other set of sections
- That way you can modify the two types completely independently of each other

Contact Us forms, subscribe forms

Time: 30 minutes

- For popups if you want them, I recommend Popup maker plugin
- Search WPForms in elementor editor bar, and use them, they're great!

Consistency part 2

Time: 1-2 hrs

Go through site checking that all colour codes are consistent, buttons are same shape, fonts are same size, etc. – use noted down list in consistency part 1 to help!

User Experience!

Time: 1 hr

One of our USPs – we care about this!

- Remember – Focus of a section should be v clear
- Don't have any sections in there just to look good!
- Clarity, Consistency, White Space, Alternation
- Minimise clicks needed, Maximise speed

Speeding up site

Time: 1-2 hrs

- Remove unnecessary videos – how much is the wavy background really adding?
- Compress images using smush plugin
 - o Accept all settings in setup wizard
 - o Lower “resize images” setting to like 700*700 to bulk compress most of them, then raise it again to at least 1500*1500 and reinsert big background image(s) at this size
- Caching using WP supercache plugin – see plugins section
 - o Settings to sort:
 - Easy > caching on > update status
 - Advanced > enable caching for all visitors
 - Advanced > compress pages to visitors
 - Advanced > cache rebuild
 - Advanced > mobile device support
 - Advanced > update status
 - Preload > preload mode (garbage collection disabled) > save settings
- Don't bother with a CDN – only really helps for v international audience, + can disrupt site function

Setting up Google Analytics

Time: 0.5-1hr

We've got a step-by-step tutorial here to make your life easier! If following this, no need to copy and paste any code, etc.

- Create a google analytics account. Create a new Gmail for the client if they don't have one already.
- On analytics dashboard, go to admin (bottom left, settings cog)
- Then click create property
- Name the property the URL
- Show advanced options
- Create universal analytics property
- Add the URL
- Click Create a universal analytics property only
- Tick relevant info
- Click create
- Then go onto WordPress dashboard. Install monsterinsights plugin.
- Launch setup wizard for monsterinsights. Follow steps to link WordPress site to google analytics property.
- Bookmark home of google analytics dashboard & send it to client alongside username and password (send securely) – viewing the data in monsterinsights gives you much less information!
- Analytics will initially show 0 views, even if you view the site – this is normal, it takes a few days to start working

Privacy Policy & Cookies

Time: 1hr

This is a legal requirement if taking any user data (contact form, Google Analytics, etc.)

- Download and set up GDPR Cookie consent plugin
- Video on this page helps with set up: <https://WordPress.org/plugins/cookie-law-info/>
- Though boring, do this step properly or your client could end up getting fined!
- To be compliant with GDPR, your popup needs to have:
 - o An accept button (can't assume consent)
 - o A clear way of changing cookie preferences (maybe have a link to the cookie policy in the footer)
 - o A privacy policy that clearly outlines what cookies you're using
(Note you only use Analytics cookie if that's all you're using)
- Privacy policy should be easily accessible (e.g., footer menu)

Privacy policy template

- We designed this to make your life easier, you should just need to:
 - o Copy and paste it into a new page called privacy policy
 - o Change name of organisation to name of your client
 - o Note any additional data collected
 - o Make sure client knows what measures are in the privacy policy
 - o Note contact details of client (with client's permission) for complaints

Privacy Policy

___ is part of the ___ Group (if relevant). This privacy policy will explain how our organization, ___, uses the personal data we collect from you when you use our website.

Topics:

- What data do we collect?
- How do we collect your data?
- How will we use your data?
- How do we store your data?
- Marketing
- What are your data protection rights?
- What are cookies?
- How do we use cookies?
- What types of cookies do we use?
- How to manage your cookies
- Privacy policies of other websites
- Changes to our privacy policy
- How to contact us

What data do we collect?

___ collects the following data:

- Personal identification information (DETAILS IN CONTACT FORM: Name, email address, phone number, etc.)
- Anonymised Google Analytics data (if consent given)

How do we collect your data?

You directly provide ___ with the data we collect. We collect data and process data when you:

- Register online or place an order for any of our products or services.
- Voluntarily complete a customer survey or provide feedback on any of our message boards or via email.
- Use or view our website via your browser's cookies.
- [Add any other ways ___ collects data]

How will we use your data?

___ collects your data so that we can:

- Get in touch with you when you fill out our contact form
- [Add how else ___ uses data]

When ___ processes your order, it may send your data to, and also use the resulting information from, credit reference agencies to prevent fraudulent purchases.

How do we store your data?

___ securely stores your data at [enter the location and describe security precautions taken].

___ will keep your [enter type of data] for [enter time period]. Once this time period has expired, we will delete your data by [enter how you delete users' data].

Marketing

___ would like to send you information about products and services of ours that we think you might like, as well as those of our partner companies.

- [List organizations that will receive data]

If you have agreed to receive marketing, you may always opt out at a later date.

You have the right at any time to stop ___ from contacting you for marketing purposes or giving your data to other members of the ___ Group.

If you no longer wish to be contacted for marketing purposes, please contact our information officer at the email address below.

What are your data protection rights?

___ would like to make sure you are fully aware of all of your data protection rights. Every user is entitled to the following:

The right to access – You have the right to request ___ for copies of your personal data. We may charge you a small fee for this service.

The right to rectification – You have the right to request that ___ correct any information you believe is inaccurate. You also have the right to request ___ to complete the information you believe is incomplete.

The right to erasure – You have the right to request that ___ erase your personal data, under certain conditions.

The right to restrict processing – You have the right to request that ___ restrict the processing of your personal data, under certain conditions.

The right to object to processing – You have the right to object to ___'s processing of your personal data, under certain conditions.

The right to data portability – You have the right to request that ___ transfer the data that we have collected to another organization, or directly to you, under certain conditions.

If you make a request, we have one month to respond to you. If you would like to exercise any of these rights, please contact us at our email:

Call us at: _____

Or write to us: _____

Cookies

Cookies are text files placed on your computer to collect standard Internet log information and visitor behaviour information. When you visit our websites, we may collect information from you automatically through cookies or similar technology

For further information, visit allaboutcookies.org.

How do we use cookies?

___ uses cookies in a range of ways to improve your experience on our website, including:

- Understanding how you use our website
- [Add any uses ___ has for cookies]

What types of cookies do we use?

There are a number of different types of cookies, however, our website uses:

- Functionality – ___ uses these cookies so that we recognize you on our website and remember your previously selected preferences. These could include what language you prefer and location you are in. A mix of first-party and third-party cookies are used.
- Advertising – ___ uses these cookies to collect information about your visit to our website, the content you viewed, the links you followed and information about your browser, device, and your IP address. ___ sometimes shares some limited aspects of this data with third parties for advertising purposes. We may also share online data collected through cookies with our advertising partners. This means that when you visit another website, you may be shown advertising based on your browsing patterns on our website.
- [Add any other types of cookies ___ uses]

How to manage cookies

You can set your browser not to accept cookies, and the above website tells you how to remove cookies from your browser. However, in a few cases, some of our website features may not function as a result.

Privacy policies of other websites

The ___ website contains links to other websites. Our privacy policy applies only to our website, so if you click on a link to another website, you should read their privacy policy.

Changes to our privacy policy

___ keeps its privacy policy under regular review and places any updates on this web page. This privacy policy was last updated on 9 January 2019.

How to contact us

If you have any questions about ___'s privacy policy, the data we hold on you, or you would like to exercise one of your data protection rights, please do not hesitate to contact us.

Email us at:

Call us:

Or write to us at:

SEO

Time: 0 hrs

- This is a never-ending process, on the more technical side of website creation
- As a design agency, we currently do not offer SEO services for our websites
- However, you should install Yoast SEO plugin and follow the very basic launch wizard (which will do a little SEO by itself), and that way the client is better placed to work on their SEO once we are done with their site

Ecommerce

This section is only relevant if you're making a shopping section.

Time: 2-4 hrs

Woocommerce is the way to go here – install the plugin and follow the setup. Then you'll notice you can't customise the shop pages that easily in elementor – it won't let you load them. So, check out:

<https://quadlayers.com/customize-woocommerce-shop-page/>

read section: 2) Customize the WooCommerce Shop Page with Page Builder

- The key is to insert shortcodes into elementor (search shortcode under widget) to insert woocommerce aspects into elementor pages

section 3) (on using Woocustomiser plugin) is also useful

Wrapping up

Time: 1 hr

- Uncheck the Settings > reading > discourage search engines from indexing this site box
- Return Settings>general> cache level > 2 (normal)
- Deactivate any unused plugins at the end of the project
- Set a filter in admin email to make sure contact enquiries never go into spam (they usually do otherwise)
- Give a client a brief explanation of how to use elementor and WordPress in a very basic capacity – you don't want them writing to you for years every time they spot a typo – how to change their logo on the menu, how to swap around images, how to change text, and mobile vs desktop views + editing will usually suffice and shouldn't take long at all. How to edit buttons important, so that they can refine the UX.
- Explain to client how to use analytics very briefly
- Make sure they have all their usernames and passwords – for WordPress, domain, server, google analytics.

There are always small things to sort before being truly done – it's often annoying as you're keen to move onto your next project, but they're worth it to leave a lasting great impression, and to have a great site on your own portfolio!

Technical Pointers

Good practices Tech

- As early as possible, write down colour codes you will be using in a place where you can easily copy and paste them in! otherwise colours across site will not match perfectly/ you'll spend a lot of time trying to make them match
- Create a folder on your computer specifically for photos, icons, etc. that you'll be using and upload them to elementor at very start (unsplash.com highly recommended for stock images)
- NEVER use negative Left/right margins, especially on mobile pages
 - o Messes up page structure greatly (leaves a white bar on right of page usually)
- Motion effects – keep the level you do them at consistent
 - o generally, do item by item – if you do them on columns/ sections too, you can get glitchy

Ways of fixing common bugs

We will aim to keep adding to this section in particular over time – please note down any quick fixes you come across, and we'll add them in!

- Items scrolling in front of sticky menu
 - o Select section >advanced > z index > 0
- Menu dropdowns not staying dropped in time to select them (on some or all pages)
 - o Check z indexes of sections this is happening on top of are set to 0
- if you have right bar on right of mobile page
 - o problem is probs negative left/right margins
 - o if you have a lot of them, create dummy page and copy in one section at a time, seeing which sections are causing the problem. If you can't fix the problematic sections, will have to start again.
- SVG files vanishing
 - o https://www.youtube.com/watch?v=NuwSk_yyV_k (set a width to the file)
- Can't scroll between photos on own computer's photo viewer
 - o Select all of them (shift + click)
 - o Click open for all of them
- Elements not displaying on live site/preview as they are in editor
 - o Elementor>settings>advanced>CSS print method >internal embedding
 - o Try deleting plugins – many clash

Last updated 17/02/2021