Mastering & Maintaining

Your WordPress Website

<A Take-Charge! Resource>

Mastering & Maintaining

Your WordPress Website

CONTENTS

In this section, we cover adding Posts, Pages, Menus, Plugins, Images and Galleries.

In this section, we cover backing up your website, updating plugins, updating the WordPress platform, and optimising your site's database.

In this section, we cover how to maintain your theme's customised settings.

In this section, we cover how to maintain your theme's customised settings.

The contents of the first two sections of this guide can also be viewed online here:

How to Master WordPress?

How to Maintain WordPress?

Suggestion

To get the most out of this guide, we suggest that you open the document on a tablet or an iPad, if possible. This will provide ease of viewing while you learn to master and maintain WordPress on your desktop.

How to Master WordPress

Like most things, using WordPress is a cinch when you know how it works. This guide is compiled for WordPress beginners and covers the most basic steps (with as many helpful screen shots as possible).

As Yoda once averred:

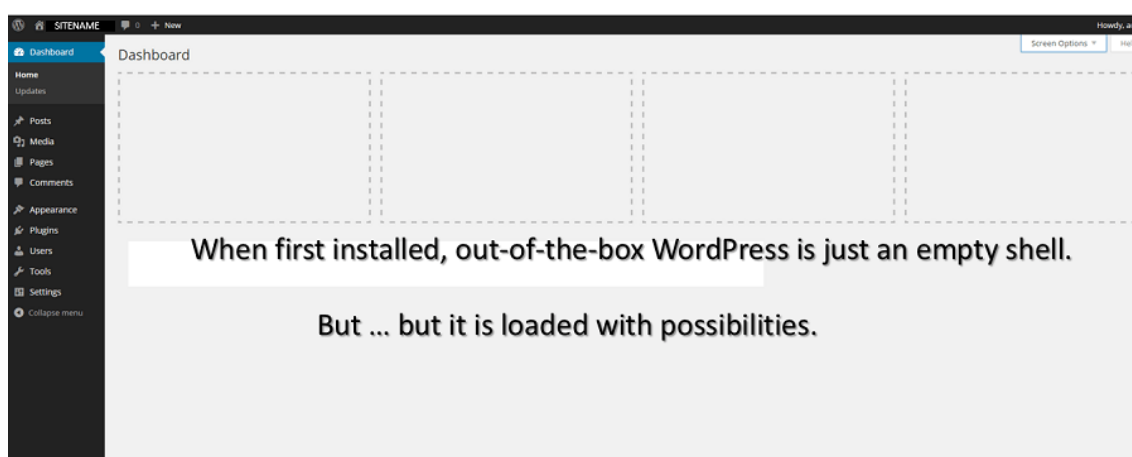" *A journey of a thousand miles begins with a single step.*

Actually, it wasn't Yoda who said that, but the Chinese philosopher, Lao Tzu. Anyway, you get the point. Ahem. So, on your pilgrimage to master WordPress, let's begin young Padawan...

How do we master WordPress?

First, a quick definition of two important terms: *front-end* and *back-end*.

The **front-end** of your website is that which is publicly visible to viewers. The shiny, pretty version. The site's **back-end** is that which is only visible to you, also called your *WordPress Dashboard*. This guide will essentially address the back-end of your website, your WordPress Dashboard. And here's what it looks like when first installed...

DIAGRAM 1

When first installed, out-of-the-box WordPress is just an empty shell.

But ... but it is loaded with possibilities.

Your **Sitename** is located in the top left-hand corner and your **Username** in the top right-hand corner. And your Dashboard's **navigational menu** runs down the left-hand sidebar. Got it? Good.
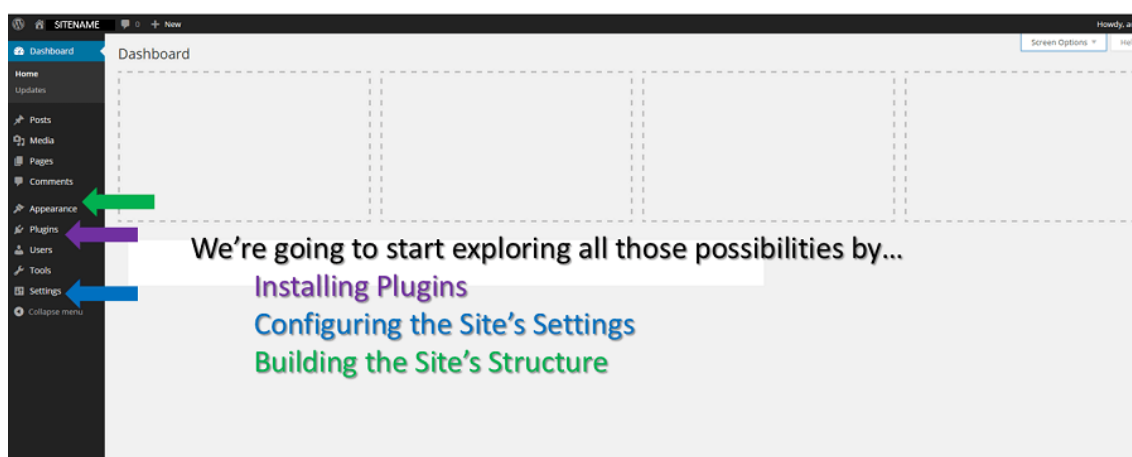
If we design your website for you, we'll lay a firm foundation by installing all the essential **plugins** needed and configuring the necessary **settings** required. We'll also build the site's structure by creating **main pages** that match the core focus areas of your business and setting up the relevant **menu bars** to help site visitors navigate your site. Aligning all this to SEO best practices is crucial.

While the front-end will look all skeleton at this stage, and not very pretty, we're making progress. Next we'll install your theme, including your choice of colour scheme and typography, add the content and images you provide, and mix in a dash of sass and swagger, making your site come alive with personality. (See the **Seven Steps to Launching Your Site** for full details on how this magic happens). Now, over to you ... let's start by **adding a blog post**. The force be with you.
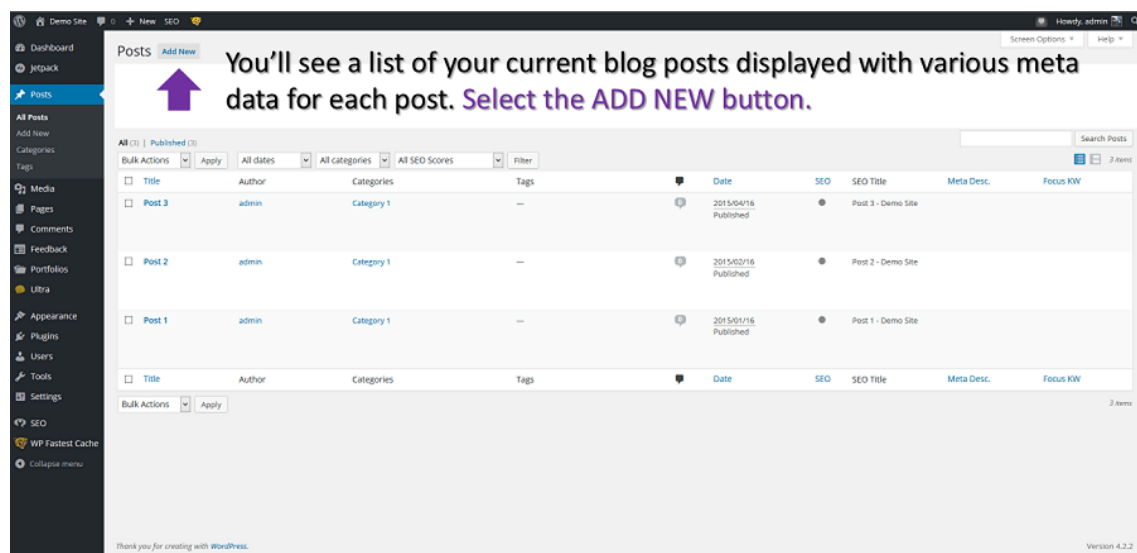
Creating WordPress Posts

DIAGRAM 3
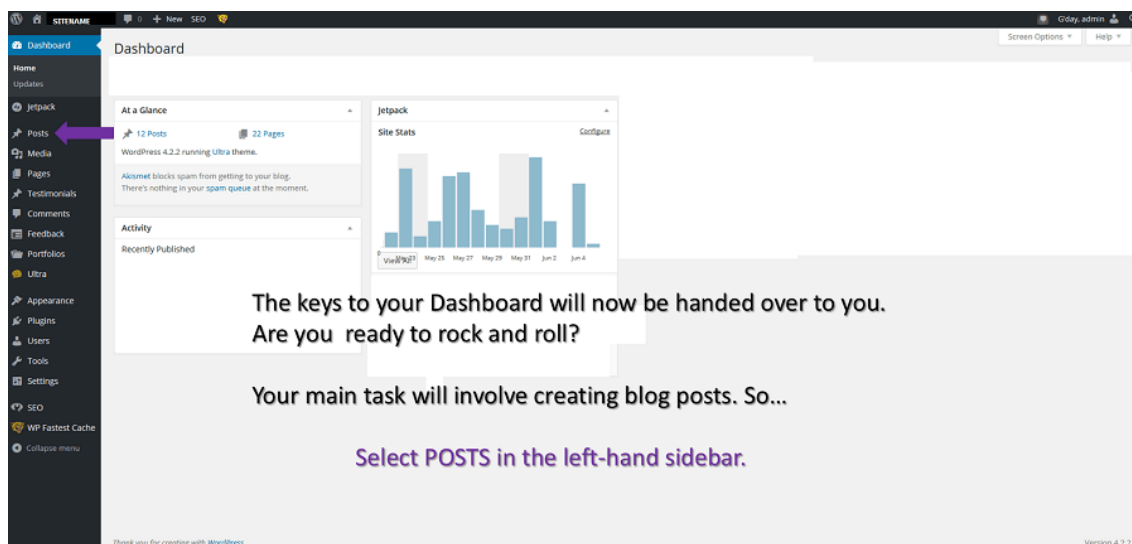
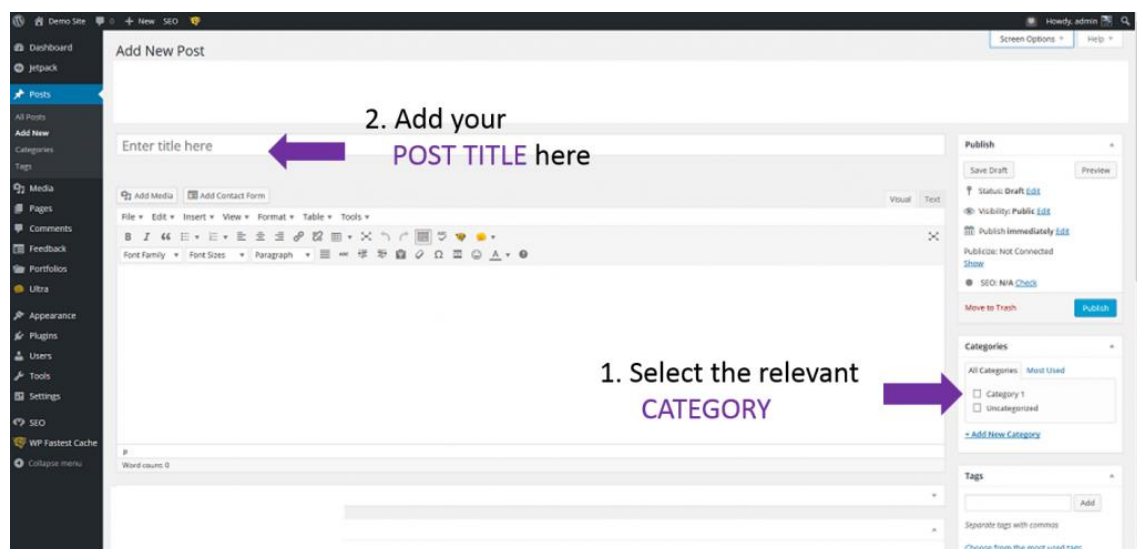Once you've selected POSTS from your left-hand sidebar, click on **"Add New"**.

You'll be presented with this blank canvass in the **WordPress WYSIWYG visual editor**.

WYSIWYG = "What You See Is What You Get"

First, **select the relevant CATEGORY**. Why? If we design your website, we'll create *categories* to match the keywords your main pages are built around. Now, if you're crafting a blog post around say, your latest *wedding photography session* or a topical article about weddings, selecting the category *Weddings* will add this keyword into the post's permalink (permanent URL).

For example: www.yoursitename.com.au/**weddings**/your-post-title

Second, **create your POST TITLE**.

Your post title is one of the most important ingredients in the SEO mix. By default, WordPress correctly makes this your H1 heading. This is a very good thing and it must only appear once. (So, don't use the H1 option again in your text.) Consider these guidelines:

- Your post title should include the main keyword that defines your page. This could be the name, venue and special feature of where the wedding was held (for a blog post about your latest wedding session), or it could be the main point of the article you're writing (for topical posts).

    For example: *Beachfront Wedding in Stunning Torquay January 2015* or 14 *Wedding Tips: Making Your Special Day Special*

- Your post title must be unique. You should not use the same title twice. For posts covering your most recent sessions, add a modifier at the end to distinguish it from other similar sessions.

    In our example, the adjective *stunning* and including the *date* may be sufficient. The *client's name* may be another helpful modifier.

Now, click on the blank WYSIWYG visual editor, and watch WordPress magically generate your post's permalink...

DIAGRAM 6
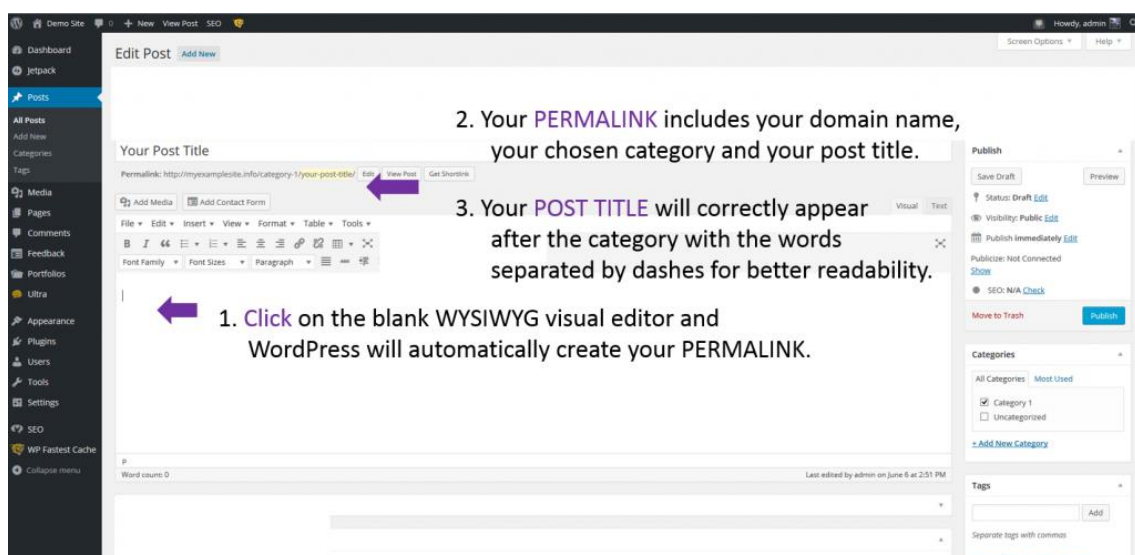
The **permalink** is the permanent URL for this blog post. You'll see your chosen **category** nicely nestled in the permalink (a good keyword added), and your **post title** will appear in lower case, the words separated by dashes to improve readability. Perfect!

You could remove generic words like *the*, *a*, *an*, *to* and the like (also called 'stop' words) making sure your keywords remain visible. Also, leave one or two modifiers so that you don't have duplicate permalinks for similar blog posts.

In our example, *Beachfront Wedding in Stunning Torquay January 2015* could be shortened in the permalink as follows:
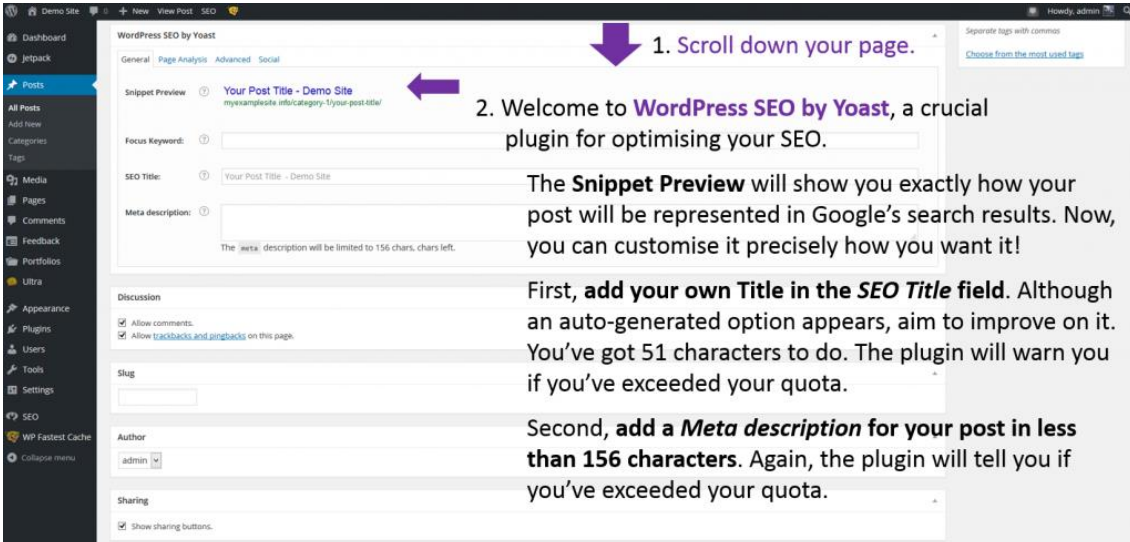
www.yoursitename.com.au/weddings/**beachfront-wedding-torquay-jan-2015**

Why bother? For one, we want to keep the permalink's tail from becoming *overly* long and redundant. While long-tail permalinks are a good thing (as it tells Google exactly what your post is about and helps viewers if they see the permalink on social media, for example), a long tail with too many dashes and generic words can appear spammy. Aim for no more than five dashes in the long tail of your permalink.

Still with me? Great. Next, **scroll down your page** using the power of your mind. If that fails, use your mouse.

Let's tidy up some meta data. (Yes, you haven't even added the post's content yet. We'll get there. Soon.)

DIAGRAM 7

If we design your website, we'll install the fantastic *WordPress SEO by Yoast* plugin. With this little magic wand, **you can customise the way your blog post appears in search results**—rather than allowing Google to guess what to include. (There's a lot more this plugin can do, too. In all the websites we design, we configure its key settings. In the *Classic* and *Premier* packages, we teach you how to utilise all of its Jedi mind-powers ... so the force will be strong in you).

Okay, once you've done that, there's a bit more house cleaning to do. Don't give up. Remember the quote about ... um, miles and uh, steps. Whatever...
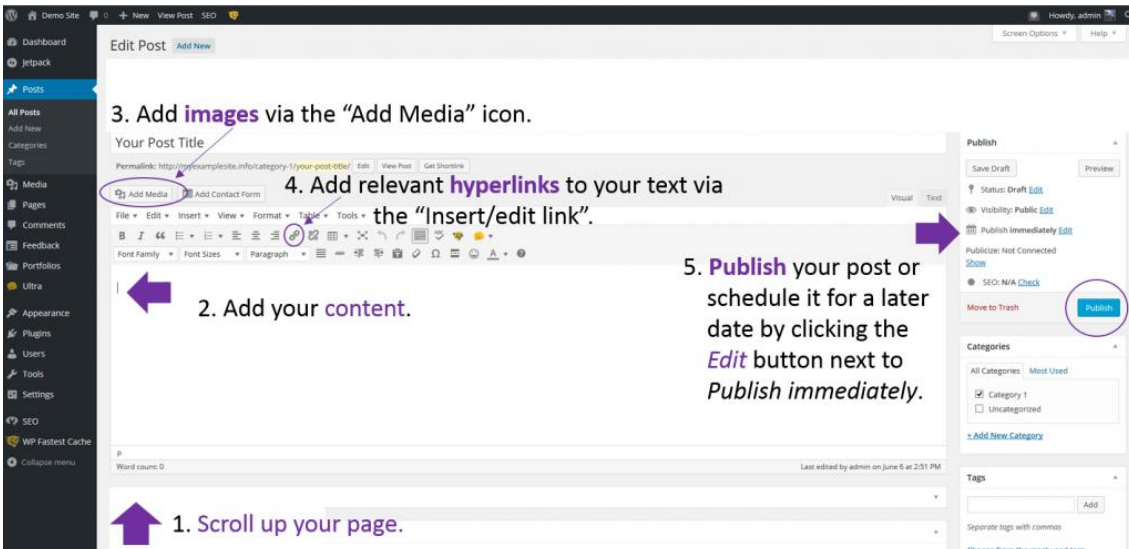
DIAGRAM 8

Now finally, you're ready to add your content to the visual editor. So, scroll up...

DIAGRAM 9

Wow! That looks like a busy screen shot with several Jedi mind-tricks going down. You can craft your content directly into the WordPress visual editor, or copy-paste content you've crafted in a Word Document. Add images and hyperlinks before publishing your post or scheduling it for a later date. There are many other things you can do, but these are the important basics.

What about *Tags*? You can add tags if you really want to, although they add no value to the SEO mix. Once upon a time, in a far, far away galaxy they did ... but because they were roundly abused, search engines don't even bother with them now. Tags may be useful to site visitors, but usually they just add to the clutter. Like C-3P0. Your choice.

Source: WordPress Posts

Creating WordPress Pages

Creating a WordPress *Page* is very similar to creating a WordPress *Post*. So, what's the difference?

WordPress Posts, which we've covered above, contain **dynamic content** that becomes **immediately visible** through your blog-feed page when published.

WordPress Pages contain **static (fixed) content** that only becomes directly visible on the front-end of your site **when added to a menu**. Your home page and secondary pages (all the content visible via your navigational menu tabs) are all *WordPress Pages*. (Incidentally, you can create *blind* Pages, content that you don't want visible on the front-end; content accessed by others via the page's permalink. A private password-protected, client-viewer gallery is an example of this.)

Although they both look similar when you're creating them in the WordPress editor, think of *Pages* as *informational content* for your business and site. This content is of a 'permanent' nature.

Think of *Posts* as *blogs or topical content* you create. This content has a date stamp to it (although you can hide the date or keep it visible). You shouldn't need to create too many new *Pages* now that your website's structure is complete, but *Posts* are where you'll really express your Jedi potential.

So, **to create a WordPress page,** simply select **PAGES → Add New** in the left-hand sidebar of your Dashboard, and follow the same steps as outlined above for POSTS.

Then ... then add the Page to an existing menu or create a new menu by selecting **APPEARANCE → MENUS** in the left-hand sidebar.
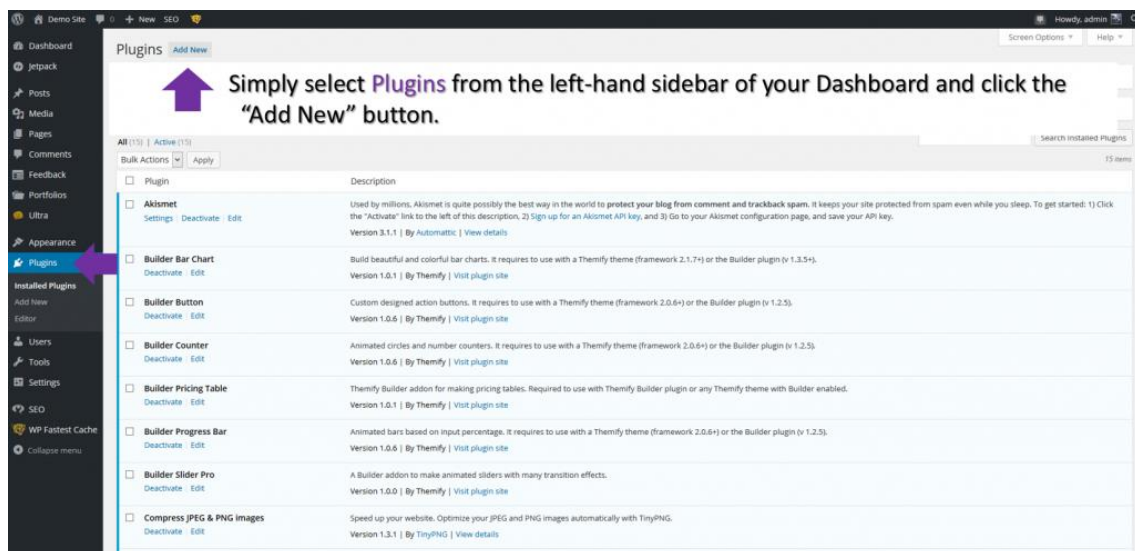
For an exceptional, interactive tutorial on setting up menus (that we cannot improve on), see WordPress's Custom Menus.

Source: WordPress Pages
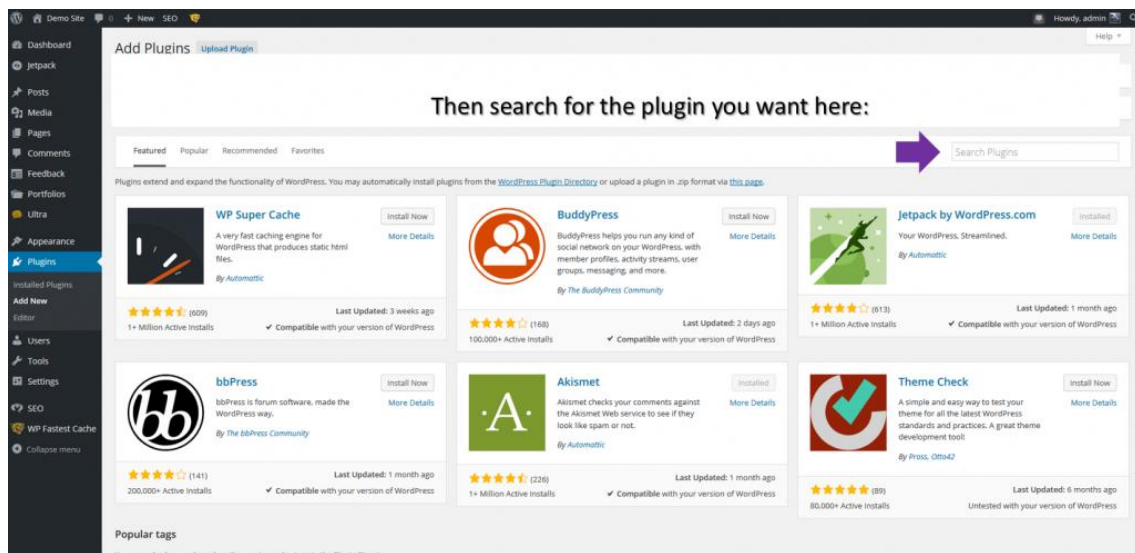

Installing WordPress Plugins

Installing WordPress plugins is easy-peasy, installing *well-coded* plugins requires a little work. First, let's look at plugin installation...

DIAGRAM 10

And...

Too easy. Yeah, that's why we recommend first going to the WordPress.org plugin page to search for the plugin you want.

Unless a plugin has been recommended by a reliable source, make sure you check the following metrics (and check them even if you do have a reliable source):

- **Star Rating:** At least an average of 4 stars from at least a hundred reviewers.
- **Compatibility:** Compatible with the latest version of WordPress.
- **Last Update:** A plugin that hasn't been updated in the past six months is a plugin you want to avoid.
- **Active Installs:** At least 100 installs. The higher the better.
- **Support:** Does the plugin creator offer adequate support?

We suggest that you also check some of the worst reviews given. Every plugin has bad reviews. Even *WordPress SEO by Yoast* that averages 4.6 stars from over a million active installs has 90 1-star reviews. Usually, these reviews are from newbie WordPressers who didn't read something important, or should have lodged a query in support. Either way, you can pick up some clues and tips about the plugin. (And if the 1-star reviews scared you, read a few 5-star reviews to build your confidence!)

Source: [WordPress Plugins](#)

Installing WordPress Images & Galleries

Installing images is very simple.
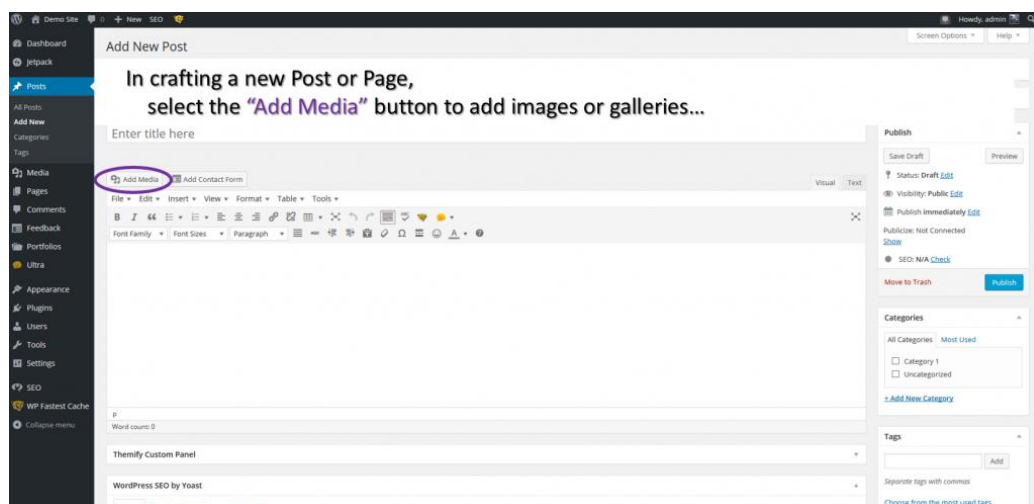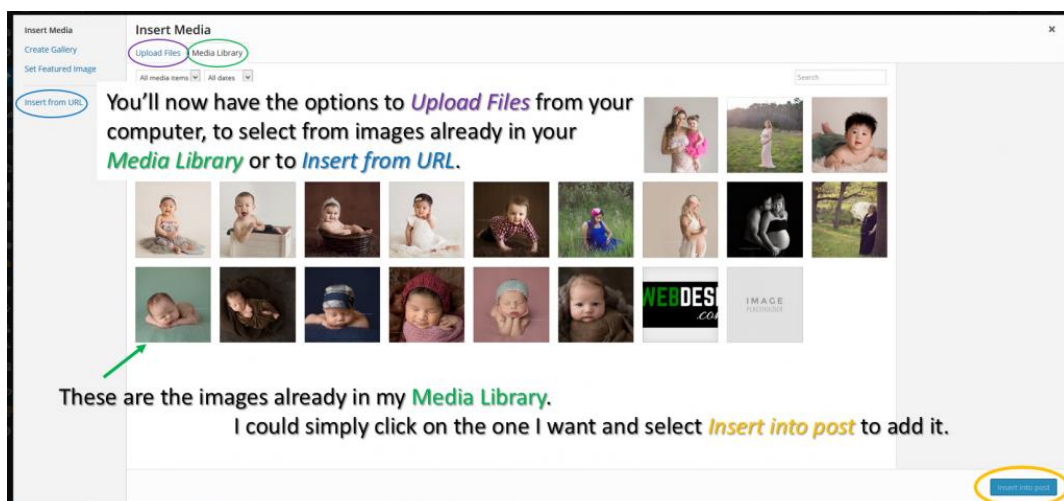
DIAGRAM 13

DIAGRAM 14

DIAGRAM 15

If you choose to **Upload Files** from your computer, you'll be presented with a meta-box field in your right-hand sidebar once the image has uploaded. The most important fields to be completed are:

- The Image **Title** field: Add a title that includes the keyword phrase for the post or page in question.
- The **ALT-text** field: Add a well punctuated sentence that describes the image and again, include your keyword phrase.

This is important for SEO purposes.

What's the ALT-text for?
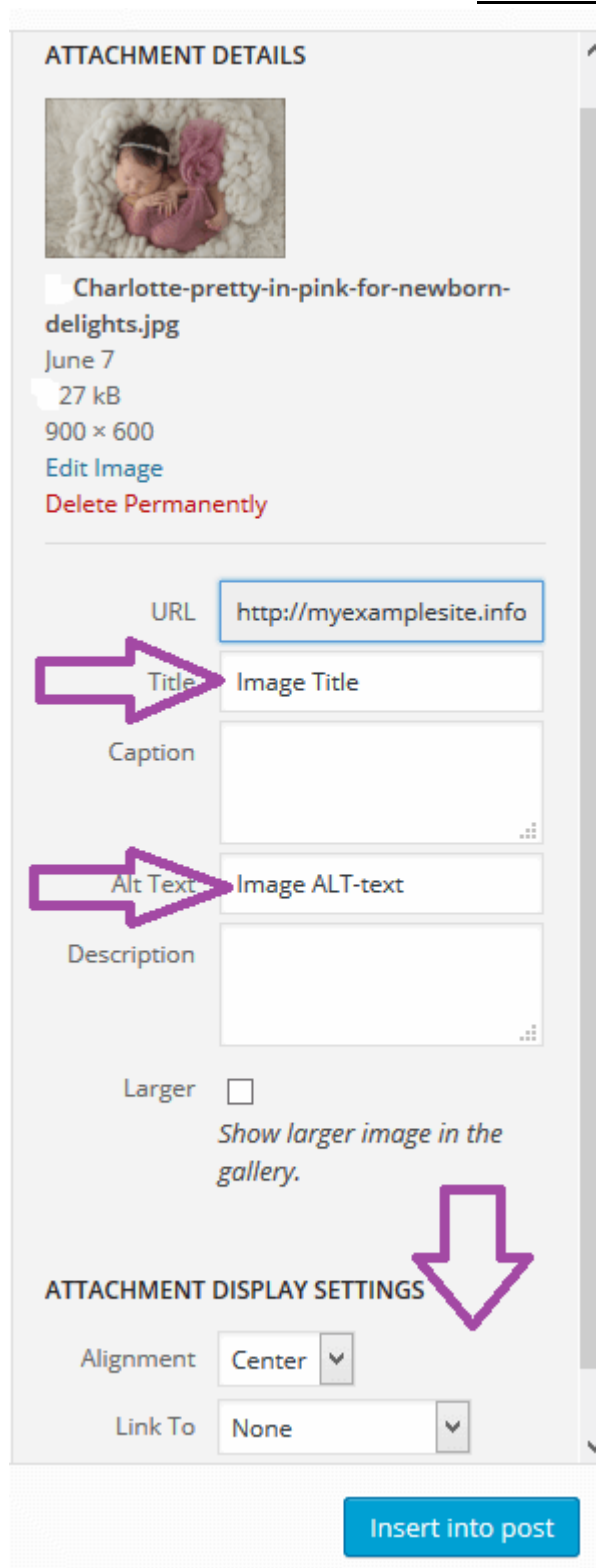
The "alternative text" is the text that appears should a viewer's browser not be able to read the image. It is also, along with the image title, the only way search engines can "see" your image.

- Finally, the **Attachment Display Settings** allow you to choose the alignment of your image (centre, right or left), what you want the image to link to (usually select "None"), and the image size you prefer. The settings can be adjusted in the WYSIWYG visual editor, too.

Adding **Galleries** is not too much more complicated, and **WordPress.com** have put together a great tutorial you can peruse entitled, Galleries and Slideshows.

Source: Images and Galleries

<div style="text-align: center">***</div>

There you have it. Are you feeling the power of the force? Well, you're not quite a Jedi knight just yet. A very important part of *mastering* WordPress involves *maintaining* WordPress.

So, before you head off to battle storm troopers, let's tackle the next section of this guide.

Source:

WordPress Codex: Getting Started with WordPress

PLEASE NOTE:

If you have purchased our Classic or Premier package, we have installed the Themify *Drag & Drop Builder* for you. With this tool, your ability to create unique and custom pages and posts increases exponentially.

In order to get the most out of this tool, please see these two articles:

Using Themify's Drag & Drop Builder

Making Edits Using Themify Builder

How to Maintain WordPress?

 The magic of the WordPress platform gives you total control over your online presence. And with great power comes great responsibility.

An essential part of mastering WordPress involves maintaining WordPress, and in this guide we show you how. (Oh, and we promise. There won't be any more Yoda quotes or references to Star Wars.)

So, how do we maintain WordPress?

In *How to Master WordPress?*, we looked at how to create Posts, Pages and Menus, and how to install Plugins. Now, *maintaining your WordPress platform* is the focus, and this includes four tasks: *backing up your website*, *keeping your plugins updated*, *updating the WordPress platform* when new versions are released, and *optimising your site*. Sounds overwhelmingly *un*-exciting? Yeah, but it has to be done, and you'll be a WordPress super-geek once you've worked through this guide.

Backing Up Your Site

The importance of this task is obvious. If you've never experience the horror of losing all your work, you don't ever want to buy that T-shirt.

There are two ways to back up your site and we recommend both.

Using Your Webhost

We highly recommend purchasing the security and backup features that your webhost offers. Most webhosts provide a backup service for around $20-$30 a year, and this usually includes regular automated backups and the ability to manually backup your site.

Find out from your webhost how the backup service works and utilise it!

Using a Plugin

Why would you need another back up if your webhost has you covered? Well, let's just say, you can never be too thorough when it comes to backing up your site. Why? Because the backup services of your webhost are not infallible. Say no more.

There are a number good plugins that you could use for this purpose. We recommend using the excellent [UpdraftPlus Backup](#) plugin that we install as an essential plugin for all our clients. With it, you can make manual or scheduled backups, and make backups to your computer and to a remote storage platform like Google Drive, Dropbox, FTP, email and others. Follow the guidelines the plugin offers under the Settings tab. If you've purchased the Premier Package from us, we've already synced your website with Google Drive. Go to **SETTINGS → UPDRAFTPLUS BACKUPS** and press "Backup Now" every two weeks or so. Simple.

One final word here about backups. You'd do well to keep a backed-up copy of your theme settings and any CSS customisation you've made, too. (We cover this in the third and final section of this guide).


Updating Your Plugins

The creators of the plugins you use regularly release updates. Why? To add new features, fix bugs and glitches, or simply to adjust to new WordPress platform releases.

If you've installed an app or five (hundred) on your mobile phone or tablet, you know the importance of keeping them updated. Failing to do so causes performance issues and could leave your mobile or tablet vulnerable. The same is true for plugins.

How do you know when a plugin needs updating? Simple.

WordPress notifies you the minute a plugin update becomes available, and does so through no less than three different notification markers in your WordPress dashboard.
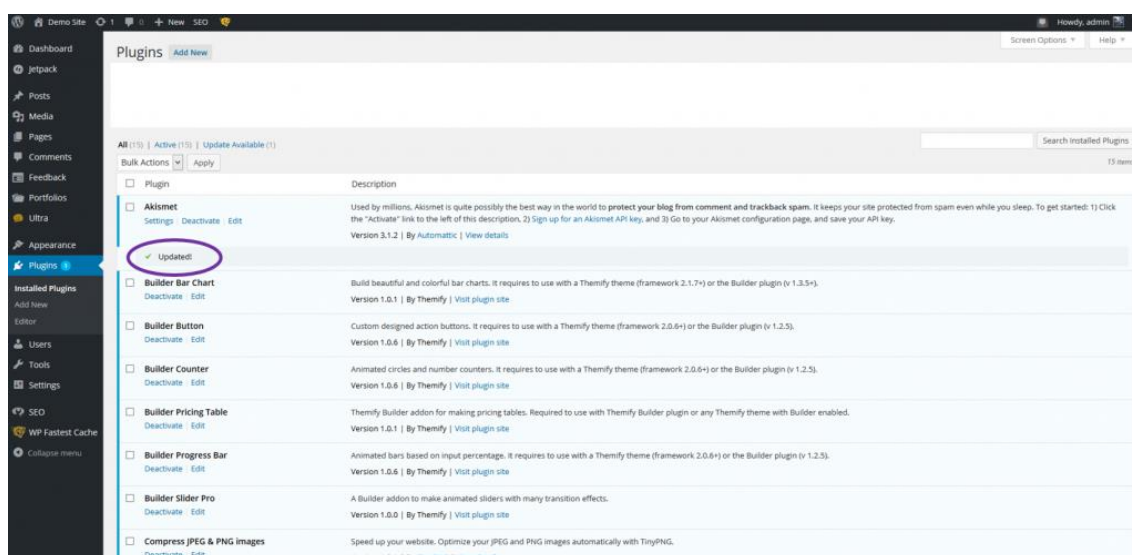
DIAGRAM 16
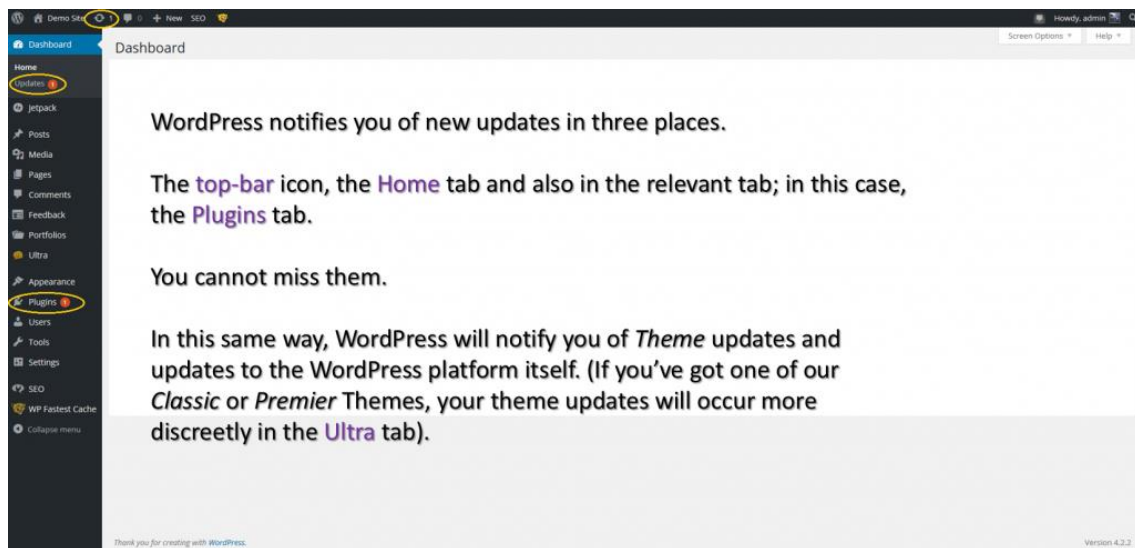
All you have to do is go to the plugin tab in the left-hand sidebar of your Dashboard, scroll down to the plugin that requires updating (clearly indicated by the red sidebar), and **click "update now"**.

DIAGRAM 17
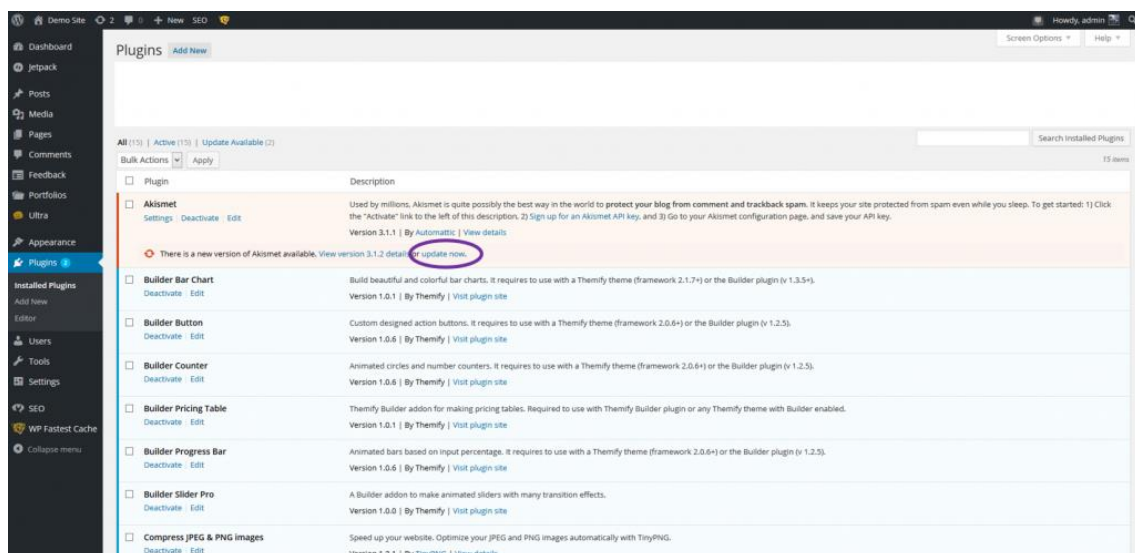
Wait a few seconds and...

DIAGRAM 18

...and do the dance of joy when you see the **Updated!** green tick.

Voila! Easy as pie. If you have several plugins that need updating at one time, you can do a **Bulk Action**, but we recommend doing them one at a time.

Updating Your WordPress Platform

Once in a while, you need to update the WordPress platform. This might not happen for several months, and then suddenly, you may find it necessary several times within a few weeks. (Some updates take place automatically; others have to be carried out manually.)

Usually, when a new WordPress software version becomes available, you'll find a re-release shortly thereafter as new glitches are dealt with, and new WordPress releases are often followed by a wave of new plugin updates—as the plugin creators make adjustments to the new software.

Again, WordPress will notify you of the new version available. However, it requires a little more thought than merely updating a plugin.

First, <u>**you must make a BACKUP of your site**</u>, as discussed above.

Second, **you must DEACTIVATE all your plugins**. *How do I do that?* Glad you asked.
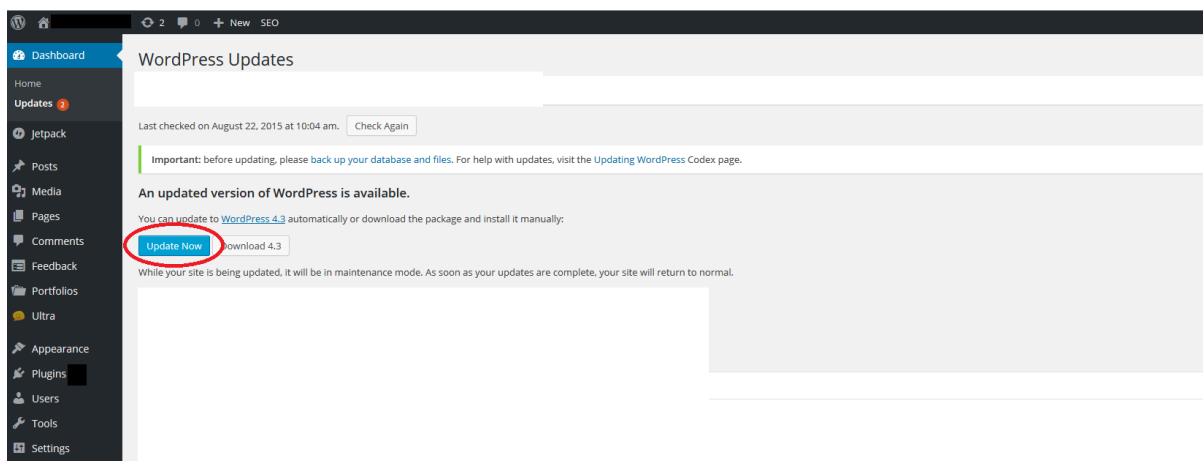
DIAGRAM 19

We recommend you do the **Bulk Action**, but **Deactivate** at most five plugins at a time. Why? To be on the safe side.

Once all your plugins are deactivated, **simply select the option to Update the WordPress platform.**

DIAGRAM 20

Then, **head back to your plugins and Activate them all again**. Our suggestion? You guessed it. No more than five at a time.

Breathe a sigh of relief that the task is complete.

Optimising Your Website

This is the quickest step of them all, if we've designed your website for you. Why? Because we install the clumsily named but phenomenal plugin Optimize Database After Deleting Revisions into all our websites. While the name admittedly tells you exactly what it does, it's not an easy one to keep on instant recall.

What does it do? It does a thorough, deep cleansing of your site. Technically, it optimises your database table but first, it deletes unnecessary trashed items, spammed items, expired transients, and pingbacks and trackbacks, shedding the unnecessary "weight" of your site. Even if you don't quite understand it, you have to admit, it at least sounds good.
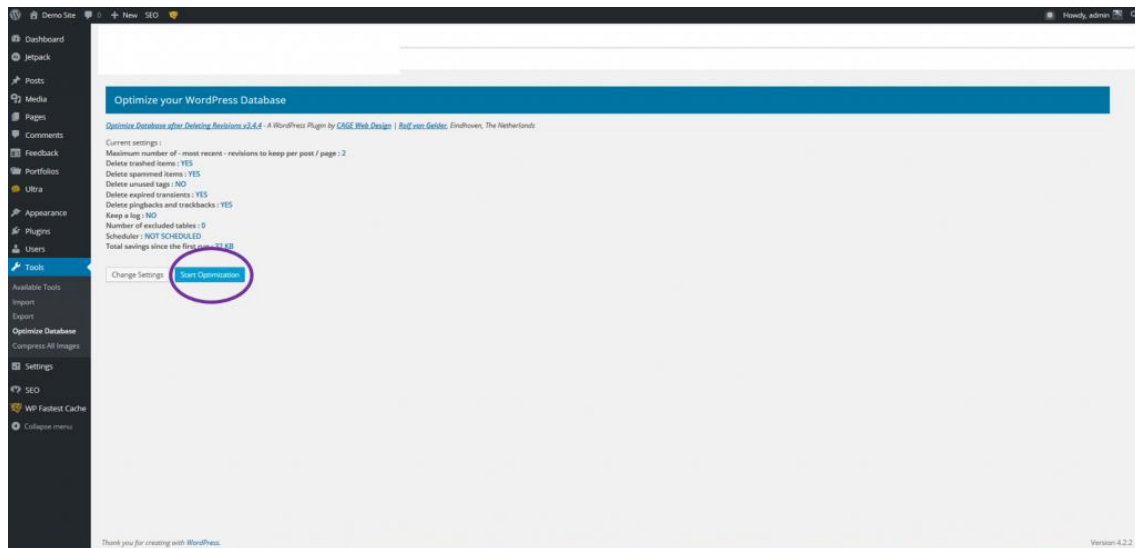
Because all the setting are done for you, all you need to do is go to the plugin here: **SETTINGS → OPTIMIZE DATABASE**, and when this page appears, **click the "Go to Optimizer" button**.

DIAGRAM 21
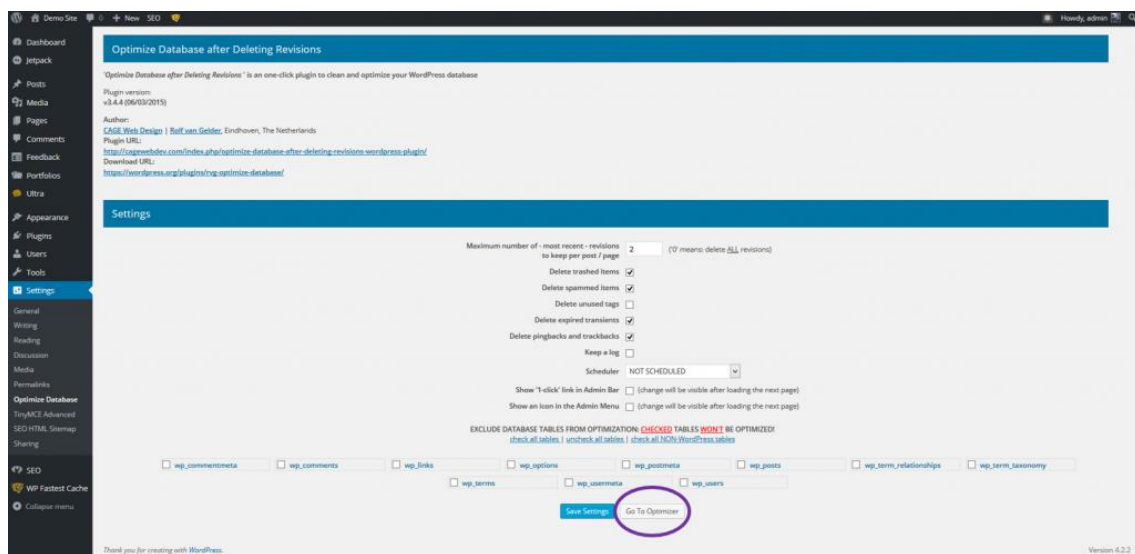
You'll be presented with a page confirming your settings. Simply click **"Start Optimzation"**.

DIAGRAM 22

In microseconds, your website will be optimised and a report delivered to you on screen. Unnecessary "weight" would have been shed from your site. Yay!

How often *can* you do this? As often as you fancy! How often *should* you do it? Before you make a backup, after you've updated a plugin, or if neither of these have been required, after you've added two or three new posts. It's not a bad idea to do it every second week. And if you don't post regularly, once a month is fine, too.

Yes, you can also optimise your website's database through your webhost's cPanel, but this is just as effective. And it's easier.

You're done! Wasn't so bad was it?

<center>***</center>

For more advanced issues, see the following sources:

WordPress on FTP: Using FileZilla

WPbeginner: How to Use FTP to Upload Files to WordPress

How to Maintain Theme Settings

Along with keeping your website backed up, we highly recommend that you keep an up-to-date copy of your theme settings. Upon completion of your website, we will send you the latest copy of these settings that we worked with. Save them on your computer and after every backup or theme upgrade, make a new copy of the most current settings.
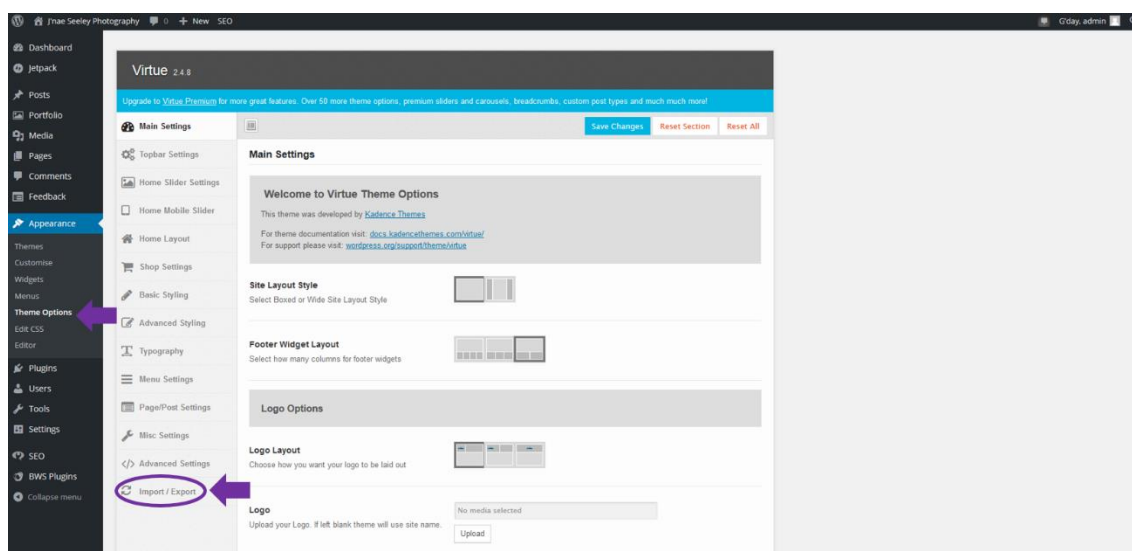
Theme Settings ~ Standard Package

If you've purchased the Standard package, your theme is called Virtue.

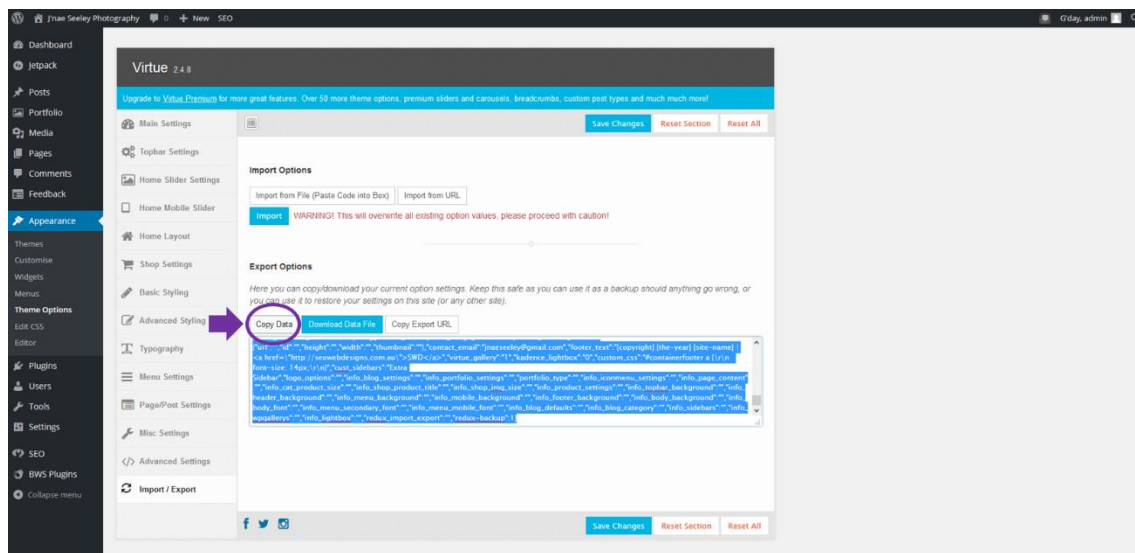To save and restore your theme settings (called *export* and *import*), first go to…

APPEARANCE → THEME OPTIONS and then select **Import / Export**.

DIAGRAM 23

When this page displays…

DIAGRAM 24

Select the **"Copy Data"** option under the **Export Options** and the code settings automatically appear highlighted. Copy-paste this code onto a *Notepad* document. (Don't use a Word document as Word inserts its own code and may contaminate the settings). Save the Notepad document, and you've successfully exported (saved) your theme settings.

To import (restore) these settings, simply select the **"Import from File (Paste Code into Box)"** under the **Import Options**, and copy-paste your code into the box provided. Click **"Import"** and don't for get to **"Save Changes"**.
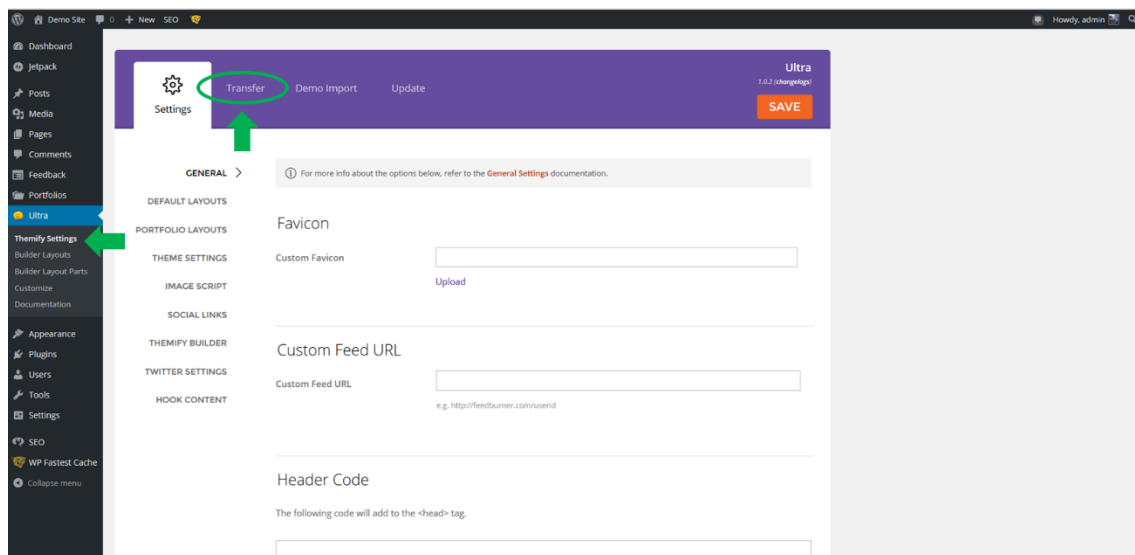
Done!

Theme Settings ~ Classic & Premier Packages

If you've purchased the Classic or Premier package, your theme is called Ultra.

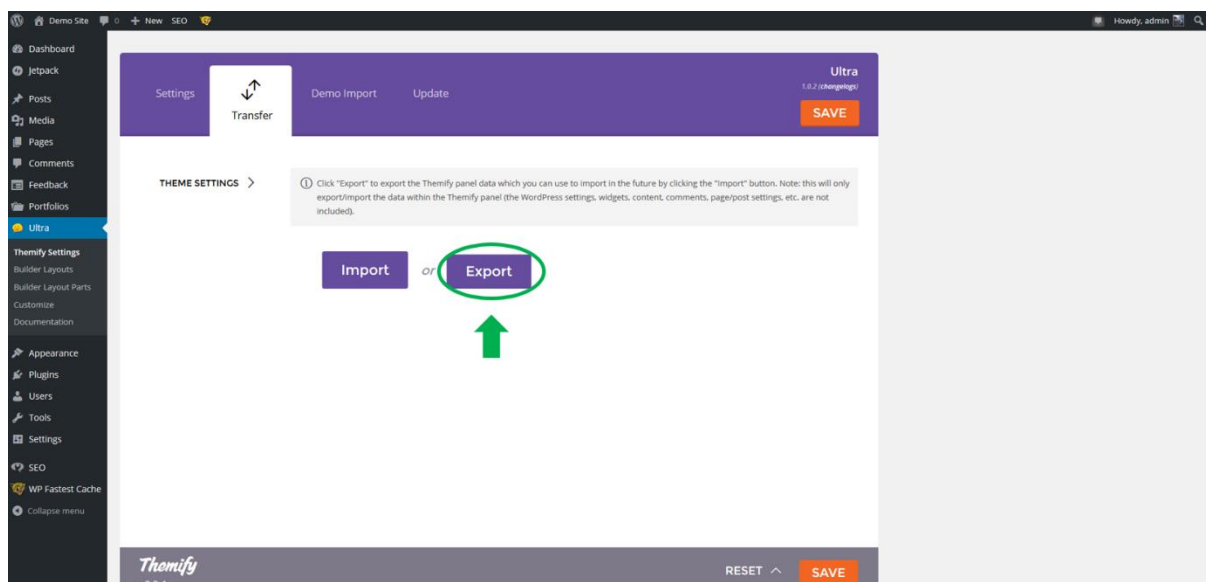To save and restore your theme settings (also called *export* and *import*), first go to…

ULTRA → THEMIFY SETTING and then select **Transfer**.

<u>**DIAGRAM 25**</u>

When this page displays…

<u>**DIAGRAM 26**</u>

Select the **"Export"** option and you'll immediately be presented with a *.zip* file of your theme's settings to save to your computer.

To import (restore) these settings, simply select the **"Import"** option**.**

Done!

You're officially a WordPress geek.

How to Use the Themify Builder

If you've purchased the Classic or Premier package, we've installed the amazing *Themify Drag & Drop Builder* for you.

With this, you can create and customise pages and posts to your heart's content.

Please see these articles on our website on how to use the Themify Builder, the first one includes a video.

[Using the Drag & Drop Builder](#)

[Making Edits Using the Themify Builder](#)

You'll love the ease of use and the wide range of options it gives you!