



# Starting your Wordpress Website

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This guide is intended to give you a step-by-step guide to setting up a WordPress site. You might be looking to make a website for your small business and you don't have much money to spend on it. Maybe you're looking for a new project to do in your spare time. Whatever your reason for setting up your new website, Wordpress is a good place to start.

## WHY WORDPRESS?

Good question. Wordpress is one of the largest website hosts in the world. It is home to the websites of The New York Times, Disney, Playstation and Facebook. It offers infinite flexibility so that little old you can make your website look however you like.

Wordpress is also reasonably easy to learn to use. There are other website hosts, like Wix and Squarespace, that offer more user friendly experiences. The trade off is that these are generally more expensive and offer fewer options than Wordpress. If you're willing to believe in yourself and learn a few things, you can master Wordpress very quickly and be setting up your own website like a pro.

While it will take a little effort to get the hang of the Wordpress interface, once you grasp a few basics you will find that it is easy to add all sorts of functions and features to give your website its own unique feel and usability.



My name is Barbi. I design things.

I've spent years in business, just where you are – trying to find the best way to raise my business profile while keeping a close eye on my budget.

I specialise in website and graphic design solutions for emerging businesses, non-profits and community organisations who can't afford design agency rates. That's why I've put together this manual. Just because you're building your own website doesn't mean you have to do it alone.

I'm here to help.

**This is me.  
I design things.**

## ARE YOU STUCK? I CAN HELP!

Drop me an email if you have a question or need a hand. I offer up to a half hour Wordpress consultation and advice for \$35 NZD.

Complete web design packages start from \$20 month for 12 months.

[info@want2be.co.nz](mailto:info@want2be.co.nz)

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# WHAT DO I DO FIRST?

I've set up a lot of Wordpress sites. We will go into all the steps in depth in the coming pages, but these are the basic steps you will want to do in order to get the structure of your website together as quickly as possible so that you can start putting in your content.

## MAKE A PLAN

Think your website through before you get started. Know what colours and fonts you want to use. Plan what your menu options are going to be. Do you want to include Facebook or other social media links or feeds? Do you want people to subscribe to your mailing list? What is your business by-line? The more you plan before getting started, the easier it will be to put together.

## FIND A HOST

Believe it or not, you don't have to get your Wordpress website from Wordpress. Many website hosting companies offer Wordpress hosting plans that offer more and cost less than what you would get from Wordpress. Some companies that offer Wordpress hosting are Bluehost, Siteground and HostGator. Pull up a search engine and find a Wordpress host that offers what you need at a price within your budget.

## CHOOSE A THEME

In Wordpress, themes provide the framework for how your website will look and function. It will be your starting point for designing a website that will be right for you. You can buy a theme from a Wordpress theme designer, but you will find that there are many themes available for free. If you choose a theme, and find that it's not right for you, do not panic. You can change your theme in Wordpress as often as you like, usually without affecting your website's content.

## CUSTOMIZE YOUR SITE IDENTITY

On your Wordpress dashboard, you'll find the Appearance menu. This is where you will find the Wordpress Customizer. Work through the options here, which will walk you through uploading your logo, inserting your tag line and choosing things like colours and fonts. Skip the menu and widget options for now. We'll come back to them later.

## SET UP YOUR PAGES

Go to the Pages section on your Dashboard. Set up and publish a page for each of the options you want to include in your navigation menu. You don't need to put anything on these pages at the moment. Just add a page, name it with how it will appear in the menu, and publish. We'll add content later.

## CREATE YOUR NAVIGATION MENU

Go back to the Appearance section and select Menu. Select "Create New Menu". You can now add those pages you just created to put your menu together. The options on your menu here are drag and drop, so you can shift them around to where you want them to appear in your menu. If you want sub-menu items, just slide them in to the right a bit. These will now appear when you hover on the main menu items.

## UPLOAD YOUR MEDIA

Prepare the images you would like to use on your website. Minimise them to a web-friendly size. Try to keep images under 250 KB for quick loading times. Name your images something meaningful and descriptive. Go to Media on the dashboard and upload your images you would like to use on your website.

## COMPLETE YOUR WEBSITE

You now have the basic structure of your website in place. You can now start filling in the content to complete your pages and posts.

## CHOOSING A DOMAIN

Your domain is your website address on the Internet, also called a URL. This is what visitors to your website might type in to find you, so usually you want something that is not too complicated in terms of punctuation and is easy to spell for users who speak the same language as you. Your domain name will usually be your business name or a variation of it. Some businesses actually rely on the availability of a domain name before choosing the name of their business.

There are many websites where you can buy a domain. These are called domain hosts. It pays to shop around and do a little research as costs and customer service can vary between hosts. If you are new to creating websites, customer service should be an important consideration as you may find you need help along the way.

## WEBSITE HOSTING

A website host is a server that hosts your website on a super-computer that is on 24 hours per day so that users can visit your website. Your website host and your domain host are two different things. You can almost always buy your domain and your hosting from the same provider, but you don't have to.

You do not need to have your Wordpress website hosted by Wordpress. I would usually advise against it. Many website hosts can offer you a Wordpress hosting package with more services and at lower cost. Shop around.

## CONTENT MANAGEMENT SYSTEM (CMS)

CMS stands for Content Management System. A CMS or Content Management System is the program you use to set up a website. Wordpress is a CMS. So is Wix, Weebly and Squarespace. There are many others. Any software that manages your website is your CMS.

Once upon a time, websites had to be written manually in HTML and PHP (markup and scripting languages, similar to programming languages). This results in long, intimidating pages of code that website browsers like Google Chrome or Microsoft's Internet Explorer would interpret into the website that you see.

A Content Management System is the means by which all of the code sheets and media that make up a website are put together and organised. Many professional web developers will still do this the old fashioned way and write their own code, but for most people, the idea of learning the intricacies of web coding is daunting.

WordPress is a Content Management System that does the coding for you, behind the scenes. The coding is still done; it's just done by Wordpress instead of by you. You can get a sneaky glimpse of this on any public website. Navigate to any site you choose, then right click and 'View Page Source'. You will see that there are pages of HTML that make up what you're seeing on your browser, yet on WordPress it is relatively easy to make a site that looks quite similar in only a few clicks.

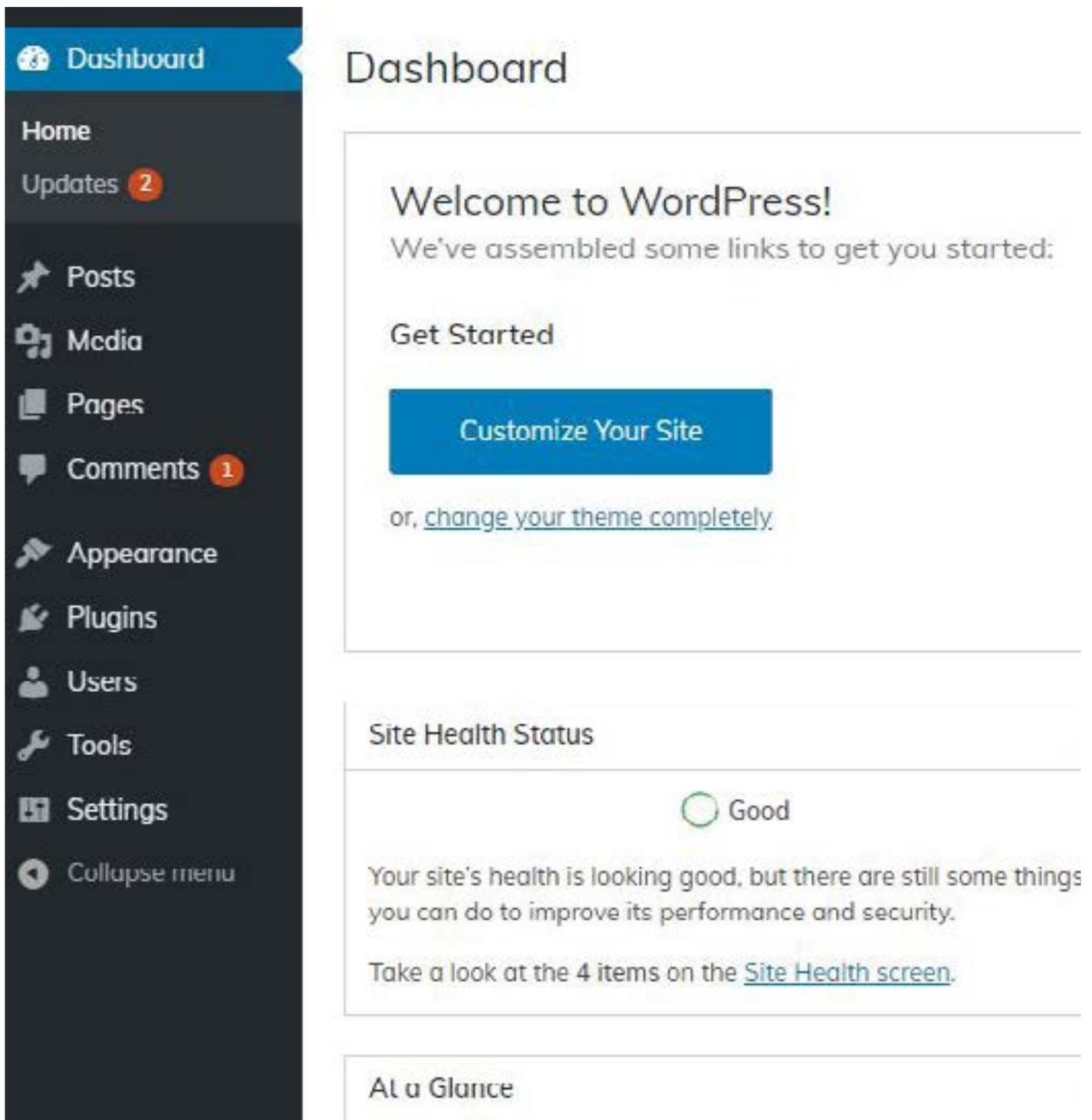
Content management systems add a friendly face to the reams of code behind the scenes. This means that with little or no knowledge of HTML, PHP or Javascript, you will be able to set up a website that works well for you.

# FINDING YOUR WAY AROUND THE WORDPRESS DASHBOARD

## WHAT IS THE WORDPRESS DASHBOARD?

The WordPress Dashboard is the hub from which your WordPress website is controlled. The WordPress dashboard menu appears in dark grey on the left side of your screen after you've signed into WordPress. It provides an overview of the plugins you are using, allows you to add media, pages and posts, add and edit themes and access your user settings. The Dashboard also keeps you informed of when plugins have been updated, and even of events related to WordPress and plugins happening in your local area.

Let's walk through these elements to get you acquainted with the layout. Each of these items will be discussed in more detail later.



The screenshot displays the WordPress Dashboard interface. On the left is a dark grey navigation menu with the following items: Dashboard (highlighted in blue), Home, Updates (with a red badge containing the number 2), Posts, Media, Pages, Comments (with a red badge containing the number 1), Appearance, Plugins, Users, Tools, Settings, and Collapse menu. The main content area is white and titled "Dashboard". It features a "Welcome to WordPress!" message with the text "We've assembled some links to get you started:". Below this is a "Get Started" section with a prominent blue button labeled "Customize Your Site". Underneath the button, it says "or, [change your theme completely.](#)". The next section is "Site Health Status", which shows a green circle icon and the word "Good". Below this, it states "Your site's health is looking good, but there are still some things you can do to improve its performance and security." and "Take a look at the 4 items on the [Site Health screen.](#)". The final section visible is "At a Glance".

# FINDING YOUR WAY AROUND THE WORDPRESS DASHBOARD

## HOME

On the dashboard Home tab, you'll find a summary of recent activity on your website, analytics (if you have them connected) and warnings of any functions that require updating.

## POSTS

The Posts tab allows you to see and edit your existing posts, or add new posts.

## MEDIA

This is where you go to upload your logo, images, pdf files and video. The Media file is like your personal library to keep all of these handy so that you can use them in posts or pages on your website.

## PAGES

The Pages tab allows you to see and edit your existing website pages, or add new pages.

## COMMENTS

The Comments page allows you to review, approve or delete comments made by website users on your pages or posts. You can change how comments are handled under **Settings**.

## APPEARANCE

The Appearance tab covers many options for you to control the look and layout of your website. Here you can change your theme, sidebars or menus or access the **Customizer** to change the details of your website.

## PLUGINS

Plugins are tools you can add to make your website more functional. At the Plugins tab, you can view your existing plugins, update or deactivate them, or add additional plugins as required.

## USERS

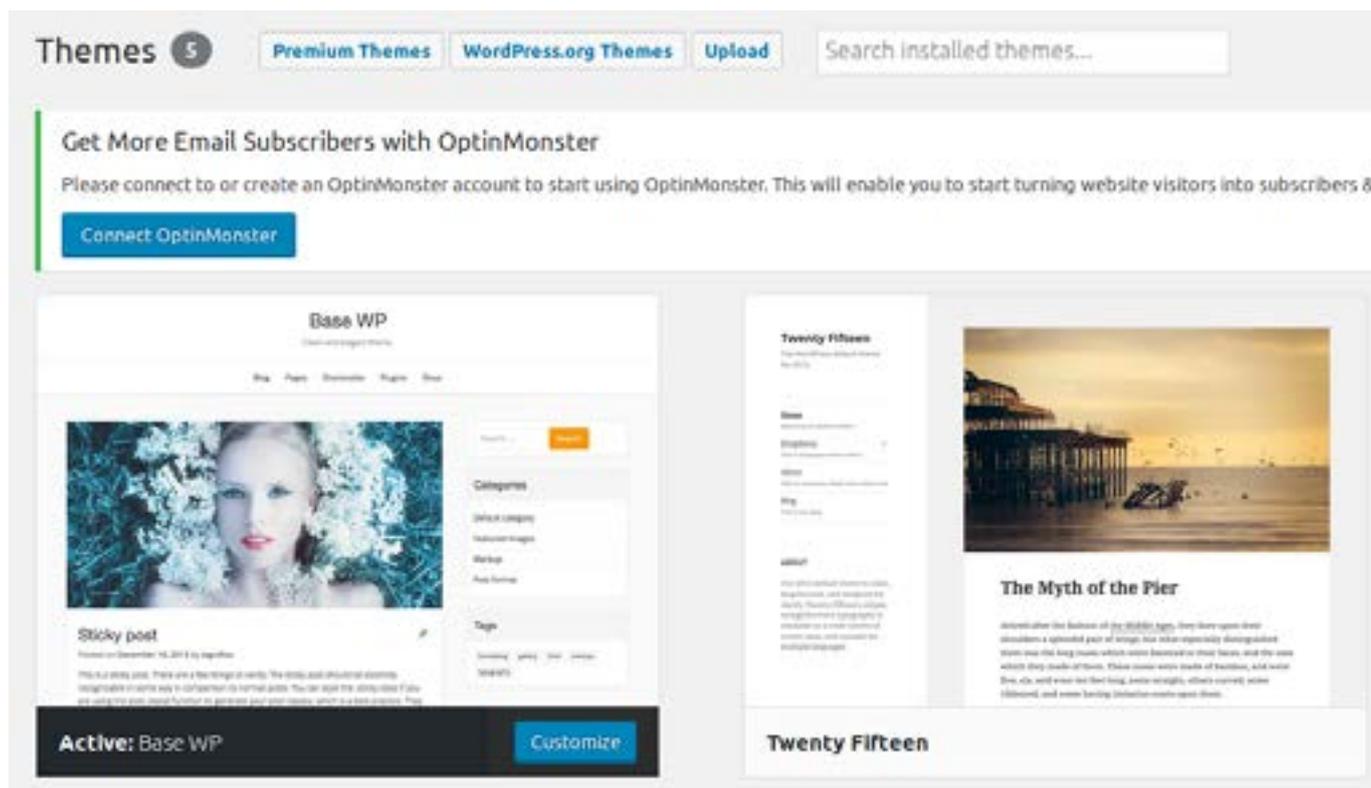
The Users tab lists all of the people who have subscribed to your website. This tab is especially useful if you would like to add an additional administrator or editor who can help you to run your website.

## TOOLS

Tools is a more advanced function of Wordpress, and many available tools are tailored for bloggers. It also allows you to export data from your website, which is handy to know if you're planning on moving website hosts.

## SETTINGS

The Settings tab gives you control of some of the functional ways your website behaves. Your settings will control such things as how user comments are handled, if your site uses an SSL certificate and default categories and formats.



## WHAT IS A THEME?

Get ready to roll up your sleeves because this is where things are going to start to get interesting.

Themes provide the framework for the overall look of your website. A theme helps present your content to users in an attractive and user-friendly way. For example, a dentist's website might have a more minimalist look, focussed on the dentist's services and location, as well as pricing and payment plans for private dentists, whereas a hotel website might be more focussed on showcasing images of the types of rooms available at the hotel.

You will probably be asked to choose a theme as soon as you sign up for your Wordpress site. Don't let this stress you out. It's usually easy to change themes if the theme you chose isn't working out for you. It is sometimes necessary to update your theme and WordPress will tell you if an update is available.

Go to the Appearance tab on your Wordpress Dashboard and click 'Themes'. A few default themes will be displayed there along with the theme you chose. At the top of the page will be a button titled 'Add New'. By clicking this, you will find thousands of theme options to choose from. Make use of the search engine on the top right to help you find the theme that will work best for you. You can search for themes by your interest or industry or by functions you would like for your theme to include.

Once you have chosen your theme, you will need to click 'Activate' for the theme to be used on your website.

Your choice of theme is also important as it has an impact on which **plugins** you are able to install. It is worth checking before you install a theme that it supports a particular plugin (e.g. WooCommerce).

Because WordPress is open source, it is possible to create your own themes and share them with other WordPress users, although this is usually a task for the professional website designer.

## THEME PREVIEWS

When you click on a theme option, you will be taken to a theme preview. Unfortunately, the preview is always of the post page, which doesn't show you much about how the theme will look on your website.

Many theme previews will include a paragraph or two from the theme developer about what is included with the theme. Developers will also often include a link to a theme demo where you can see a more realistic view of what the theme will look like on an actual website. Theme previews often include reviews from other Wordpress users who have used the theme, which may be helpful as you make your selection.

## RESPONSIVE VS. NONRESPONSIVE THEMES

Responsive themes are themes which adapt to the size of screen that they are being viewed on. People are increasingly using mobile phones and tablets to access the internet. A responsive theme adjusts your website's design to suit a variety of devices. Most themes are responsive, but not all. It pays to check.

## PAID THEMES VS FREE THEMES

The themes offered under the Wordpress dashboard are all free to use. Wordpress theme developers also offer more advanced themes for a fee. Paid themes will usually include additional usability and features, and a greater ability to adjust the theme to your liking. Paid themes are usually reasonably priced between US \$35 - \$150.

However, a lot can be done to adjust a free theme to suit your purposes if you're willing to invest a little time into research. **Plugins** can be used to increase functionality. Colours, fonts and other appearance adjustments can be made by using the Additional CSS feature in **Customizer**. While you may not be familiar with CSS coding, the code you need to make the changes you want can often be found with a website search.

## CHILD THEMES

If you intend to adjust your theme using CSS, it is recommended that you create a Child theme. A child is a duplicate of the parent theme (the theme you have activated) that can be edited without losing the functionality of the parent theme.

## WHAT IF I WANT TO CHANGE MY THEME?

This is usually easily done. In most cases, you can just select a new theme and Activate it, and all of your content - pages, posts and functions - will automatically adjust to the new theme. You will still want to go through your Customizer options to update your choices if necessary.

## HTML

HTML (Hypertext Markup Language) is the computer language that tells browsers like Google Chrome or Explorer how to display a website. Wordpress makes web design more user-friendly by taking away much of the need to understand HTML. Looking at a sheet of HTML can look intimidating to a beginner, but if you master Wordpress and want to go deeper in making your website unique, you may want to learn the basic commands. It's really not as complicated as it looks.

## CASCADING STYLE SHEET (CSS)

A Cascading Style Sheet (or CSS) is the coding used on the back end of website that determines how the website looks and behaves. It is how things like colours, fonts, spacing etc are specified. Your CSS will be part of the theme you choose. You can make alterations to the CSS in your theme in Custom CSS sections of Customizer.

Customizer is a unique feature of Wordpress and should be your first port of call in setting up the structure of your website. Customizer can be found under the Appearance tab on your dashboard.

The options in Customiser will vary somewhat depending on what theme you chose. There are, however, common features that you will need to navigate.

## SITE IDENTITY

Site Identity allows you to upload your logo and include your business name and tagline so that it can be used throughout your website. You will also be invited to upload a site icon. A site icon is the mini-logo that appears on the browser tab next to your page name.

## MENUS

You can set up your menu using links to your existing pages and posts. You can even set up menu items using links to pages outside of your website.

Take a few minutes to set up the pages you want in the Pages section before setting up your menu.

Many themes will allow you to have more than one menu. The second menu may be above or below the first in your header, or in a sidebar. When you create a menu, you will need to choose the location for your menu.

## WIDGETS

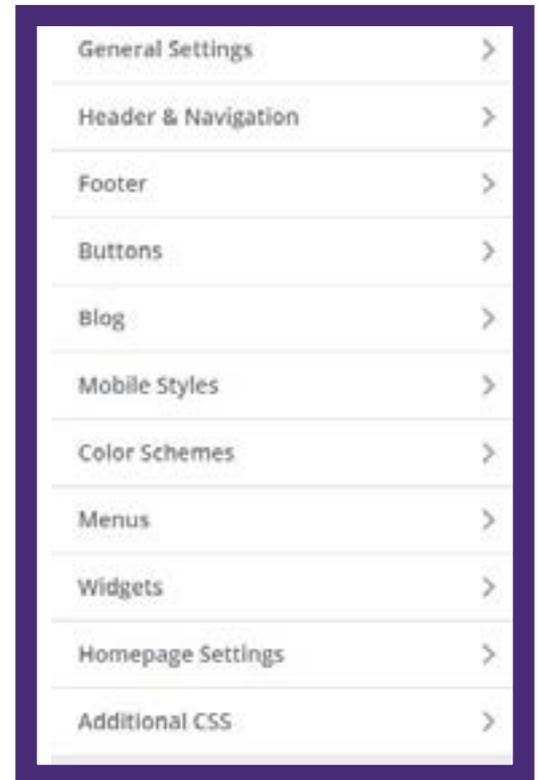
We'll talk about **widgets** more in another section, but in the Customizer, you can choose widgets for your footer and sidebar sections. Widgets may include things like a search bar, a gallery of images, contact information, a map of your business location or features products from your shop.

## HOMEPAGE SETTINGS

If your website is purely for blogging purposes, you will probably want your **Posts** page to be your Homepage. This is the Wordpress default. However, in most instances you will want a static homepage. Choose the page that will be your homepage here.

## ADDITIONAL CSS

This is a more advanced feature of Wordpress, but not as difficult to use as you might think. If you are using a free Wordpress theme, you will probably be limited on your font and colour choices and other details on modifying your theme to suit your business. You can override those limitations by adding additional CSS. You can often do this even if you don't know anything about web coding by doing an internet search for the coding of the change you would like to make and copying / pasting the suggested CSS. If you don't like the change, just delete the CSS you added from here.



# ADJUSTING YOUR SETTINGS

Settings are accessed from your WordPress Dashboard. Settings allow you to change things like your contact details or date format, as well as settings for your posts and media, such as allowing comments or the default publishing category for a post.

For the most part, you will probably not need to change a lot in your Wordpress settings. Most people are pretty happy with the default settings. However, there are a few things that might be helpful to know.

## GENERAL SETTINGS

### Site Address

If you are adding or removing an SSL Certificate, you will want to change how your website address is formatted here. Your address will need to start with <https://> if you are using a SSL Certificate and with <http://> if you are not.

### Administration Email Address

This is the default address where all of your forms, comments and other website notifications will be delivered. Make sure it is an address where you collect email.

### Timezone

Calendars, event plug-ins, countdown timers and other time sensitive applications will use this setting as their foundation. If you will be using any of the above functions, please make sure this is set to your correct time zone.

## DISCUSSION

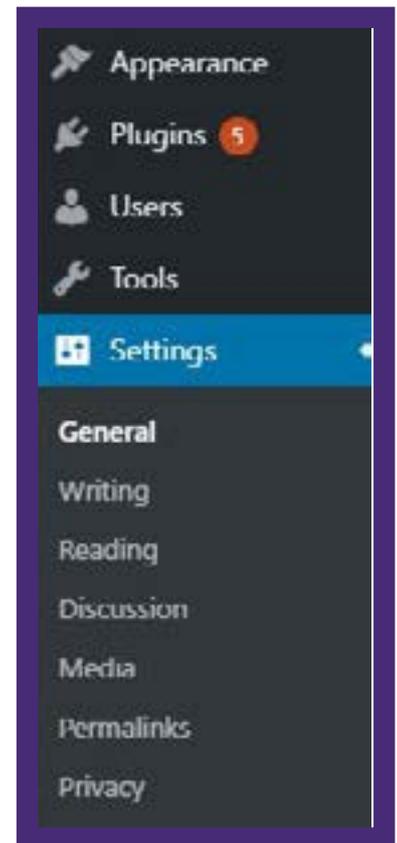
### Default Post and Comment Settings

Wordpress was originally designed for blogs. As such, it encouraged visitors to leave comments on posts. This drives up web traffic for increased SEO (Search Engine Optimisation).

Comments are also an open door for spammers. Unless you install an anti-spam plugin like Akismet, you will find that you have an influx of spam comments. Sometimes these are formatted like additional comments and you may not even realise the comment is spam until you take a close look at the commentor's email address.

The easiest way to turn off the spam is to turn off the comments. The ability for users to comment can be turned off in the Discussion section of your site Settings.

Of course, if blogging makes up a significant portion of your website content, you may want the comments, in which case use an anti-spam plugin to help keep the spammers at bay. You can also adjust the other settings here to receive or stop receiving emails when someone leaves a comment, or to hold comments until you have approved them.



Page builders (or editors) are the built-in tools that help you to design your pages and posts without any knowledge of web coding. In the early days of Wordpress, the Classic Editor offered limited options to building your pages. As competition for DIY website options increased, the need for more rich, user-friendly, "drag and drop" editors became apparent.

Traditionally, Wordpress used the Classic Editor, which was clunky and didn't offer many options. Wordpress has since updated with the Gutenberg Editor. This is free to all Wordpress users and allows you to build your website pages using prescribed building blocks, like text blocks, images and galleries. While Gutenberg is a great improvement over the Classic editor, there are other Editors available to you through plugins that allow even greater flexibility and options. A popular free Editor that can be added is Elementor, which gives drag and drop functionality to building your pages.

## CONTENT BLOCKS (MODULES)

Most Wordpress Editors use content blocks, sometimes called Modules, to add rows, columns, text, images and other options to your website. Different editors will work in different ways and give you a different array of options. Your content choices will usually be available on the left side of the screen when you are creating a page, post or portfolio. Click the option you want and drag and drop it to your page. You will then be given options to add to or modify the content block to include the information you want.

We'll take a moment to discuss some of the options that are available to you as you build your website's pages.

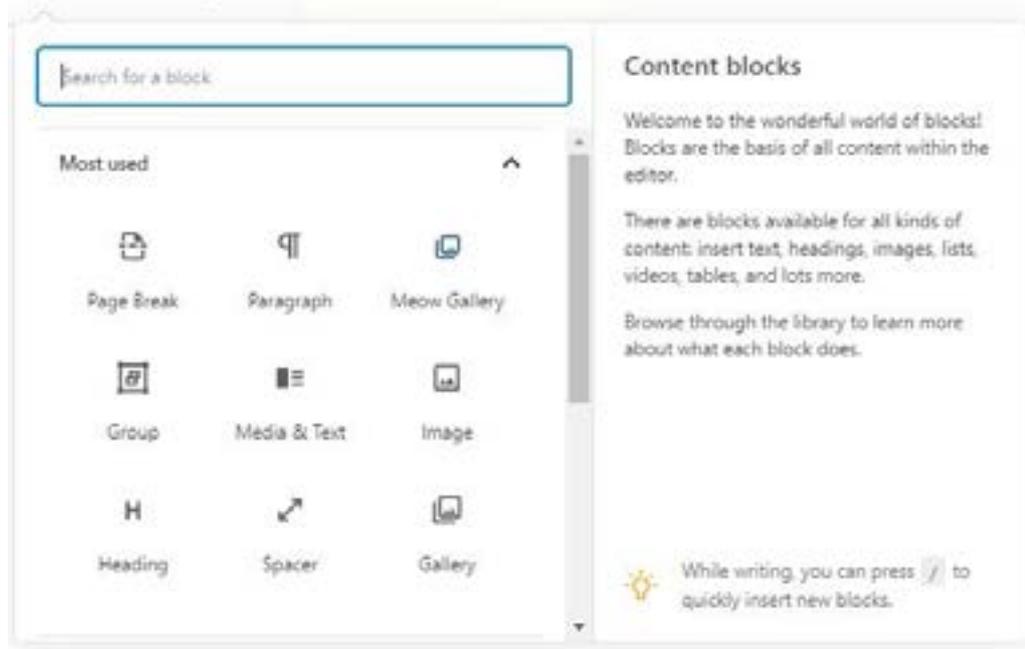
## CLASSIC EDITOR

The Classic Editor used to be Wordpress' default Editor. It is a very simple editor that allows you to build your web page block by block, using text blocks, images or video and simple modules. Design options in the Classic Editor are very limited. For this reason, Wordpress developed the Gutenberg Editor.

## GUTENBERG EDITOR

The Gutenberg Editor is the new default Wordpress editor. It is an evolution of the Classic Editor and offers more options for setting up a complex, user-friendly website experience. The Gutenberg Editor offers a variety of content blocks, allowing you more creative room to develop a useful and beautiful website. Choose content blocks by clicking the plus sign at the top left of your Editor.

The Classic or Gutenberg Editor allows you to add simple blocks of content to your page or post by clicking the '+' at the top left of your page.



## ELEMENTOR

Elementor is a drag and drop page builder available as a free plugin that can be found and installed via a plugin search.

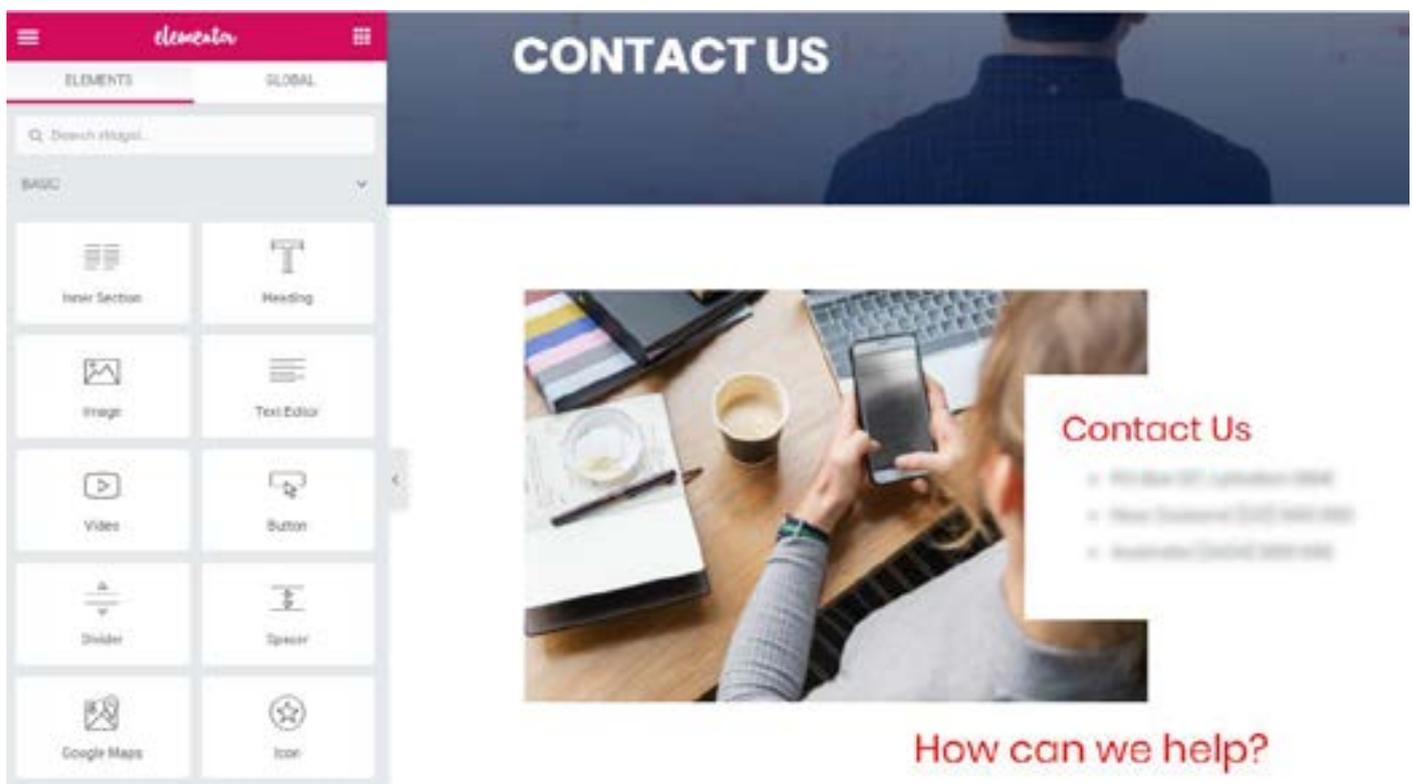
Drag-and-drop page builders allow you to see your website as it would appear to a website visitor. Content is still added as blocks as with the Classic and Gutenberg Editors, but are added so you can see immediately how they will look on your website page.

Additional blocks for Elementor can be found as plugins. There is also a paid version of Elementor that can be purchased for additional functionality and ease of use.

Since Elementor is not a default Wordpress editor, you will need to choose to use it every time you add or edit a page or post.

## OTHER DRAG AND DROP EDITORS

There are several drag and drop editors available that are similar to Elementor. Some of these, like Beaver Builder, are available as free plug-ins. Experiment to find which page builder you are most comfortable with. Page builders like WPBakery can be purchased online and uploaded through your plugins. Sometimes these paid editors are included with paid themes.



Elementor is one of several popular drag and drop editors and is available for free as a plugin. Drag and drop Editors allow you to see how your content blocks will look on your website as you add them.

# MENUS, SIDEBARS AND WIDGETS



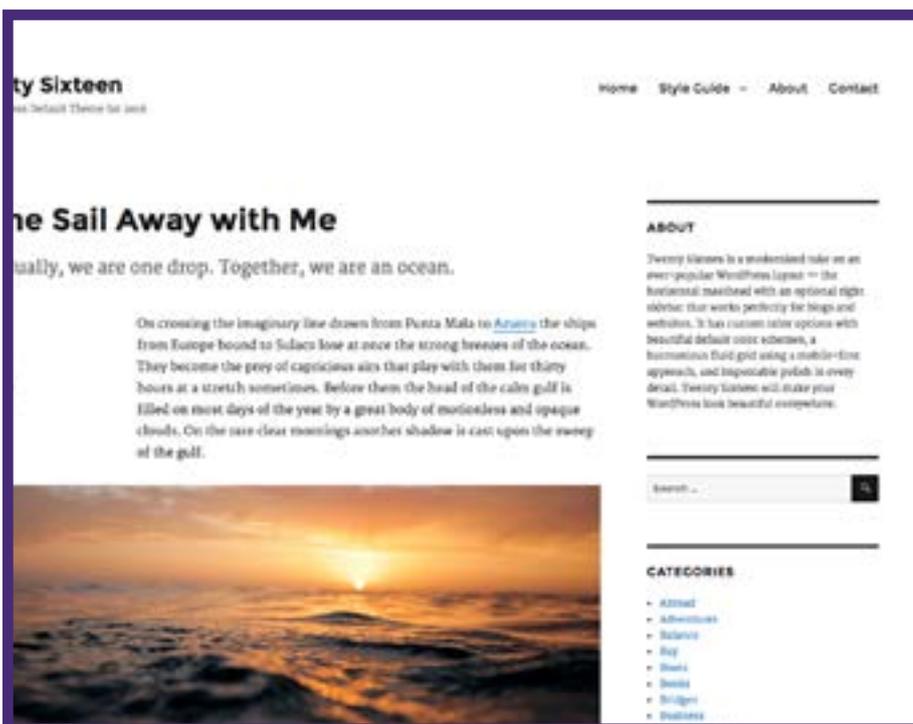
## MENUS

Menus are managed under the Appearance tab of your Dashboard. Menus let you manage the hierarchy of pages and of course are indispensable for structuring your site. Sometimes, different themes will affect how your menus look, so be sure to test drive any of your changes as it can make the site harder to access when using a computer, and especially when using a mobile phone or tablet.

### CREATING A MENU

To create a new menu, type a name for your menu in the 'Menu Name' box, then click 'Save Menu'. You can now add pages and posts to the menu by clicking the tickboxes on the left side of the screen and clicking 'Add to Menu'.

## SIDEBARS



Sidebars are a regular feature of WordPress. A sidebar is a column that will sit on the side of your website to put pertinent information within easy reach. You will probably find that sidebars are the default page design for most themes. You can choose what information you would like in your sidebar in the Widget section of your Dashboard.

If you do not want a sidebar as part of your design, you can usually turn it off either under your theme's settings or on the individual page. There will sometimes be a toggle switch on your page Editor to turn this off, or you can change your default template to one that does not contain a sidebar.

# MENUS, SIDEBARS AND WIDGETS

## WIDGETS

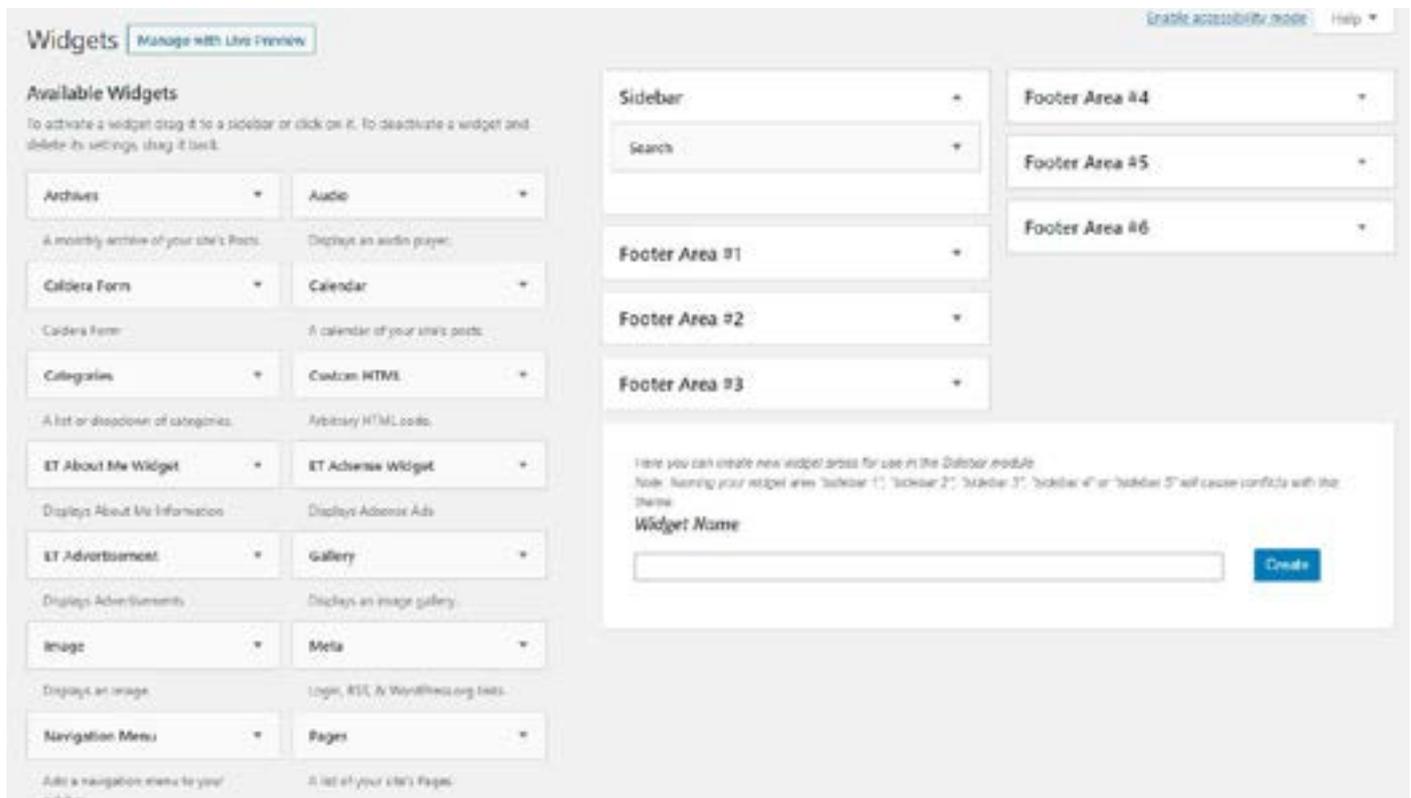
Widgets are blocks which perform functions, such as those for shopping carts, recent posts and audio. Widgets allows your users to do something useful or to access important information. Widgets are added to widget-ready areas (such as sidebars) to improve the functionality of your site without the need for additional coding.

**Common widgets include:**

- Contact information
- Social media share buttons
- Google map of your location
- A form to join your mailing list
- Featured products from your online shop
- Text blocks
- Images or galleries
- Testimonials from your customers.

Widgets can be added like content blocks to your sidebars or footers. Many themes offer the option of widgetised home page.

You will find your widget options on the Widget section in Customizer. You can drag and drop your chosen widgets to the places on your website where you would like them to appear.



Widgets are a great way of getting your call to action within easy reach of your visitors. Use basic contact information and maybe a Google map or contact form in your footer. Sidebars a great place for your newsletter sign up form or social media links.

## PAGES VS. POSTS: WHAT'S THE DIFFERENCE?

When I first started working with Wordpress, I found the difference between Pages and Posts confusing. Wordpress began as a spot for bloggers and was designed to easily update a regular flow of content. That's what Posts are all about.

For information that is going to live on your website over the long-term, you'll want a Page. In the relationship matrix of Wordpress, a Page is a marriage and a Post is a fling. Pages should be used for your About, Contact and any other permanent content. Posts are used for news, events, blogs or anything else that is temporary or transient in nature.

## WIREFRAMING

Wireframing is one of the most common ways to plan the design of your website. This is ideal as the wireframe is something like a building plan. You design the overall hierarchy of your website, its headings and how each page links to the others, e.g. an 'About Us' page might link to a contact page, or a page where newsletters can be downloaded might link to a blog or news page. Wireframing does not take too much time (just draw your ideal site's page tree on a piece of paper) and stops you making time-consuming mistakes later on.

The image shows a screenshot of the WordPress dashboard. On the left, there is a dark sidebar with navigation options: Dashboard, Posts (highlighted), All Posts, Add New, Categories, Tags, Media, Pages, Comments, Projects, Stars Testimonials, and Caldera Forms. The main content area displays 'Hello world!' in a large font. Below it, there is a 'Classic' editor with a text block containing the text: 'Welcome to WordPress. This is your first post. Edit or delete it, then start writing!'. To the right of the main content area, there is a settings sidebar with a 'Document' tab selected. The settings include: Status & visibility, Permalink, Categories, Tags, Featured image, Excerpt, and Discussion. Each setting has a dropdown arrow next to it.

## HOW TO ADD A PAGE

Adding pages is simple. Find 'Pages' on your Wordpress dashboard. Once you've clicked it, add a title and some content, then click 'Publish'. You should be able to check your page using its URL.

## SETTING UP A PAGE

Ta-da! Now you have a page! Now what?

Before you start playing around with your Editor to make your page look and say what you want, there are a few settings to attend to. It pays to do this up front to ensure your pages are set up properly and working hard for you.

- **Page Title:** Make sure your page title succinctly describes your page. It should be simple but descriptive of your page's content.
- **Feature Image:** A feature image will be the image that comes up when you share your page on social media or when it comes up in a Google search. Choose an image from your Media library that is descriptive of your page. Many themes will cause the featured image to appear at the top of your page. If this does not suit your website design, you can override it with a plugin called Hide Featured Image.
- **SEO settings:** An SEO plugin will help you format your pages in a way that will make it easier for search engines to find you. Use the prompts of your SEO plugin to maximise your page titles and description.

Once your page is set up, open your Editor and start adding rows and content blocks to give your page the look and message you want.



## HOW MANY PAGES DO I NEED?

Ideally you will not have too many pages on your website and the titles of the pages should be as self-explanatory as possible (I always think six is a good amount to begin with). Once visitors have reached your site, it is best to grab their attention before they leave. If a site is more difficult to navigate, they are likely to navigate away from your site and look for information elsewhere.

## HOW TO ADD A POST

Adding a post is very similar to adding a page. Just log into your WordPress site, then you will come to the WordPress dashboard. Find 'Posts' on the sidebar. Once you've clicked it, add a title and some content, then click 'Publish'. You should be able to check your post using its URL. Posts are slightly different to pages as, along with seeing an overview of your posts and having the option to add new ones, you also have the option to use categories and tags. More information on categories and tags is included later in this book.

Some themes include Portfolios, also called Projects. This is a feature used for displaying a creative project and is useful for designers, freelancers, tradespeople and craftspeople. The Portfolio moves beyond a simple image or gallery by allowing you to include the story behind your creation and include multiple images to tell that story.

If your chosen theme does not include a portfolio feature, but you would like to use one, you can add a portfolio plugin through the Plugin tab. Some popular portfolio plugins are Go, Essential Grid or Ultra Portfolio.

## WHY USE THE PORTFOLIO FEATURE?

Portfolios give you a more efficient way of showcasing your work. Like posts, all portfolios will automatically appear on a central Portfolio page, so you don't need to redesign your webpage each time you add a project.

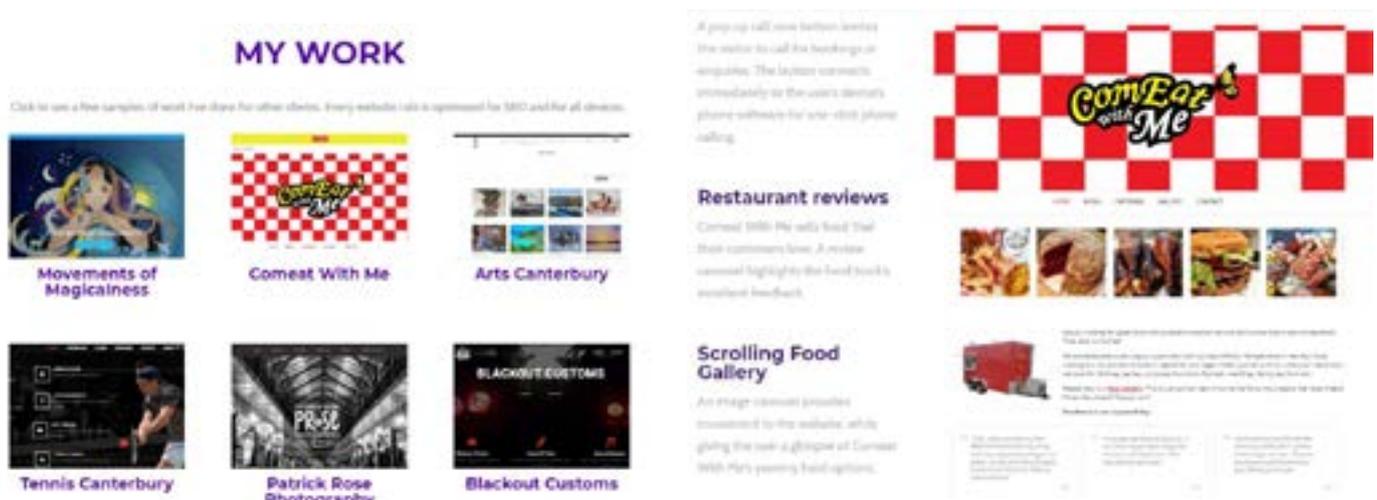
## HOW TO ADD A PORTFOLIO

Portfolios are created much like Posts. Your theme's or plugin's Portfolio will feature on your dashboard. Add a new portfolio the same way you would add a post. The specifics on how to set up your portfolio will vary depending on the software used, but most will give you options for displaying text and images in a way that will give your work the most impact.

Your portfolios will automatically display on a portfolio page. They can also be included on any of your other pages or posts through content blocks and widgets.

## PORTFOLIO CATEGORIES

Portfolios are also similar to posts in that they use categories. As well as having a portfolio page, which you may or may not choose to use in your navigation menu, you can add portfolio blocks to different pages on your website that can filter your portfolio selection to different categories. For example, if you are a graphic designer, you can add a portfolio block on your logo design page that only shows your logo design portfolios.



Portfolios work in a similar way to posts and give you an opportunity to tell the story behind each project you've done in a way that can easily be showcased in a gallery.

The media library is where video, images, audio, pdfs and other media files are kept. There are a number of ways to upload media files to WordPress, including from your computer and using URLs.

## PREPARING YOUR FILES FOR UPLOAD

Before uploading your files, give them sensible files names. It's better to have an image titled "Mike-and-Susan.jpg" than "INV006549840.jpg". It may seem like an unnecessary step, but will help improve your SEO and make it easier to search your files later if you develop a large collection.

This is also the time to condense large files. Images on your website should not be more than about 500 KB and less if possible. Large files are slow to load on websites and will quickly use up your bandwidth.

## HOW TO UPLOAD A FILE FROM YOUR COMPUTER

Click on the Media option on the Wordpress dashboard. Click 'Add New'. You have the choice to either drag and drop your files from your computer or to use the uploader. I always recommend using the uploader, as the drag and drop method frequently malfunctions. You can upload multiple files at a time with the uploader by holding down the Control key on your computer while clicking on each of the files you want to upload.

## FILLING IN METADATA

It is good practise to complete the metadata on your freshly loaded files. Trust me, you will never remember to do it later. Most importantly, complete the Alt text. Alt text is the text that appears if you hover over an image or if you are unable to see the image due to computer settings, slow internet speed or personal disability. Computer voice readers, such as those used by the blind, will read out this text to explain what was in your image. Your Alt text should be explanatory, i.e. "Mike and Susan having a picnic by the river".

Metadata, like Alt text and the description, will help boost your **SEO**. They give search engines information to catalogue and show that your website is accessible to the disabled, which helps to boost your showing in web searches.

## GALLERIES

When displaying images on your website's pages and posts, you will generally have the option of inserting a single image or a gallery. A gallery is selection of images from your Media library that can be displayed in an assortment of ways.

Gallery options may include:

- Grid format, which is a tidy grid of your images cropped to the same dimensions,
- Masonry format, which fits your various sized images into an artistic composition, or
- Image carousel, which will display your images as moving slides.

If you're not satisfied with the galleries on offer through your Editor, there are a variety of free gallery plugins you can try until you find one that works for you.

## SLIDERS

Sliders are similar to the carousel view in the gallery, in that they display a slideshow of content that you want to showcase on your website. Sliders are often featured at the top of home pages as a way of grabbing attention and highlighting key services or products.

Things to consider when making a slider are whether the site is going to be read by users on mobile phones, and the speed that your site will load in. The slider may affect the layout on a phone and mobile phone users may be less prepared to use a site that uses a large amount of mobile data or that takes a long time to load. The layout problem can be resolved using a responsive slider plugin.

## HOW TO ADD A SLIDER

There are a number of plugins, such as Soliloquy, that can be used to add a slider. Many plugins of this kind also have options to edit the size of the slider and timing of the transition between slides. This can usually be done in the section dedicated to the plugin on the WordPress dashboard.

# POLISHING UP YOUR PAGES AND POSTS

## USING MEDIA

Media can be added to portfolios, galleries, sliders and as the background of your site. Use media sparingly. Too much media can overwhelm your visitors and also makes the site's loading time longer, which may make it less suitable for visitors on mobile phones and tablets. It may also impact the site's search rank on search engines (sites with longer loading times may be given less favourable rankings).

## CATEGORIES

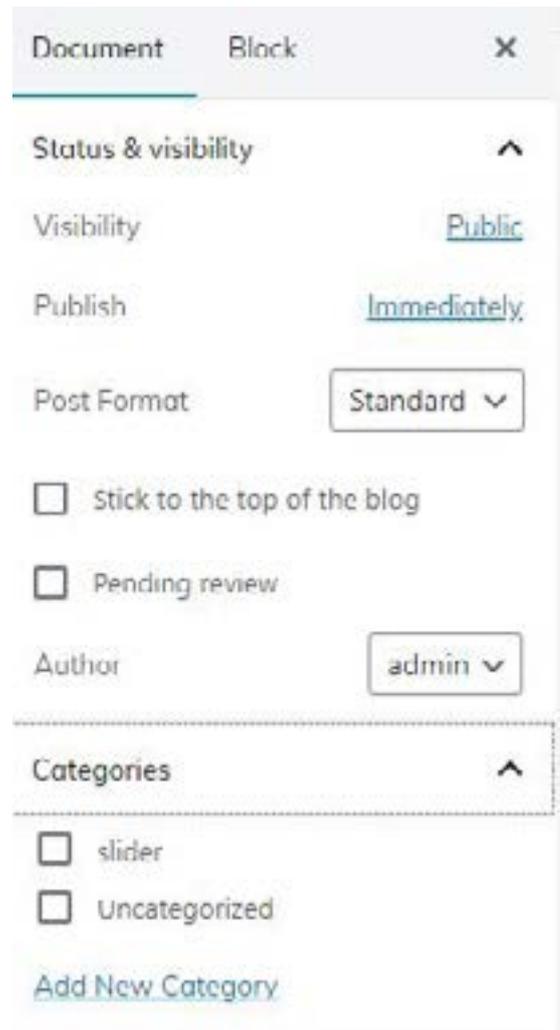
Categories are used to sort posts into different groups. Broadly speaking, this allows readers to quickly find other information relevant to the category that they are searching for – e.g. if a blog had a section on health and fitness, this might make a good category. Posts can be added to more than one category, but it is not recommended to add posts to too many categories. It is probably best to have content relating to only a few categories on your site overall to make sure that the content is relevant to your audience.

The advantage to using categories is to make your content easier to search and to sort. For example, you can add a content block to a page that only includes content from one category. This would allow you to have pages for specific content, making your site easier to navigate for visitors looking for specific information.

### HOW TO ADD CATEGORIES

You can choose or add categories to a post in the sidebar to the right of your Editor when you are creating your post.

You can also add or delete categories in the Category section under the Posts tab on your Dashboard.



The image shows a screenshot of the WordPress post editor sidebar. At the top, there are two tabs: 'Document' (selected) and 'Block'. Below the tabs, there is a close button 'X'. The sidebar is divided into sections. The first section is 'Status & visibility' with an upward arrow. It contains 'Visibility' set to 'Public', 'Publish' set to 'Immediately', and 'Post Format' set to 'Standard' with a dropdown arrow. Below this are two checkboxes: 'Stick to the top of the blog' and 'Pending review', both of which are unchecked. The 'Author' is set to 'admin' with a dropdown arrow. The second section is 'Categories' with an upward arrow. It contains two checkboxes: 'slider' and 'Uncategorized', both of which are unchecked. At the bottom of the 'Categories' section is a link 'Add New Category'.

## TAGS

Tags are used in a similar way to categories, but I prefer to think of them as fine detail, rather than the broad brush strokes that categories provide.

Tags can be added under 'Posts' on the sidebar on the WordPress dashboard. It is a good idea not to add too many tags. They should be useful for readers and not spammy.

## SLUGS

No, they're not just creepy, slimy things. A slug is a 'human-friendly' version of a URL. For example, you may have a post titled "How to Feed Two Children for Ten Dollars or Less". The default URL to this page might be [www.yourwebsite.com/how-to-feed-two-children-for-five-pounds-or-less](http://www.yourwebsite.com/how-to-feed-two-children-for-five-pounds-or-less). If you want something a little more user-friendly, you might change the slug to 'cheapkidsfood', making the web address easier to remember and type.

## THOSE AMAZING PLUGINS

If pages and posts are the bones of your website, plugins are the muscle that gives it power.

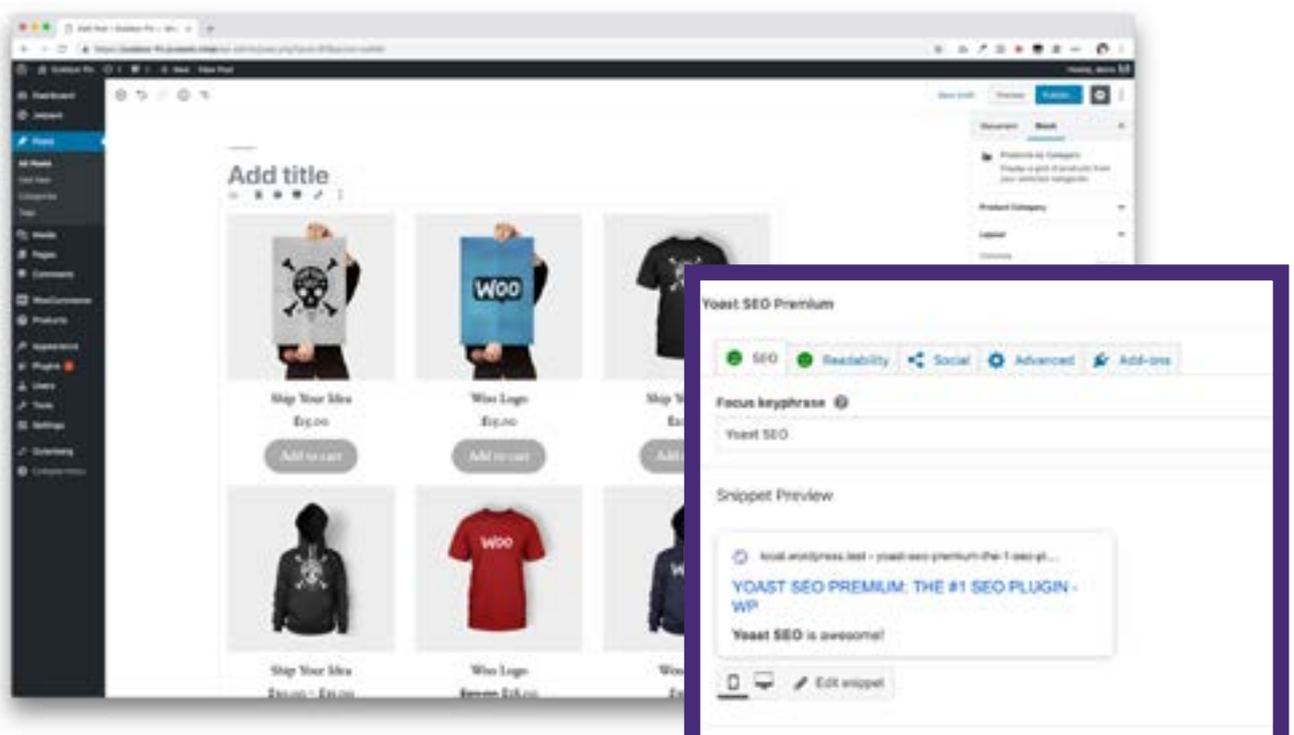
Plugins are a way of very quickly and easily expanding the functionality of your website. For example, if you know that your website is getting many visitors from a particular country, you might install a translation plugin if you cannot afford or do not yet have the visitor numbers to justify having your website professionally translated. Another example might be using the WP Maps plugin in order to display your company's location using Google Maps. As with themes, many plugins are free, but some require payment.

Some common plugins:

- Yoast SEO will help you to improve your website's ability to be found by search engines
- Akismet is a common plugin to help you prevent spam on your website
- WooCommerce allows you to make your website into an online store with shopping cart and payment options

Is there some cool feature or job you would like for your website to do but you don't know how to make it happen? Go to your Plugin section on your Dashboard and Add New. Use the search engine to search plugins for the functionality you're looking for. Most of the plugins you find will be free with more powerful versions with additional features available for a cost.

In order to work, plugins must be installed and then activated. When you activate a plugin, it should include a wizard or tutorial to walk you through setting it up. Plugins can also be deactivated later (but this will not uninstall them). They can be deleted separately on the 'plugins' page.



Plugins make can enable your website to do virtually anything you want it to do. The Woocommerce plugin will turn your website into an online shop. Yoast SEO will walk you through optimising each page and post to be found by search engines.

# SEARCH ENGINE OPTIMISATION (SEO)

## WHAT IS SEO?

Search Engine Optimisation (usually referred to as SEO) are the bag of tricks that help your website to get found by search engines.

Search engines like Google or Bing work by regularly scanning websites. Their scanning programs are usually called web crawlers, but are also referred to as search bots or spiders. Web crawlers scan the back end information of a website, looking for information that it can catalogue so it can draw up the information when someone searches for it.

A common problem with DIY websites is that the people producing them give the web crawlers little information to find and catalogue. Web crawlers are blind; they can't actually see your website. They rely on information being presented in a way that enables them to find it, assess its value on your site and catalogue it so that others can find it. SEO is the toolbox that allows that to happen.

## KEYWORDS AND PHRASES

Key words are the words that people may type into search engines to find you. Your keywords should start with the words that you want people to associate with your site. So, if I owned a driving company, I might want to mention the words 'driving', 'lessons' and the name of the town where I offered my services. These are keywords.

A key phrase is a string of keywords. These are more powerful than simple keywords as most people use phrases when doing an internet search. In recent years, people have commonly started "talking" to their search engines, entering complete questions, like "Where can I find low cost driving lessons in Auckland?" These translate to "long tail keywords". Long tail keywords are so specific that they generate less search engine traffic, but offer a higher conversion rate as it answers a specific enquiry.

Maximising the use of keywords is core to increasing your website's SEO. Brainstorm words and phrases that people may use to find your business online. Get some friends or trusted advisors involved. People approach search engines a wide variety of ways, so get other perspectives. Look for online tools like Google's Keyword Planner.

When compiling your keyword list, consider what makes your offering unique. Be as specific as possible. Are you known for your casual, friendly service? Your attention to detail? Your bespoke products? You don't just offer piano lessons. You offer friendly, patient piano lessons to children aged 8-16 in their own homes in Ellerslie, Auckland.

Now that you have a list of keywords and phrases, what do you do with them?

- Work them into your headings. Headings are one of the first place web crawlers look when trying to catalogue the information on your website, so make sure you're using them.
- Include them in the metadata on your media files. The metadata is the back end information like the ALT text and the description.
- Work them throughout the text on your website. Many DIY websites contain pages of poorly written content that is too general for web crawlers to work with. Don't be one of them.

Another important consideration with key words is your key word strategy. This is whether you want to cover a broad range of search terms (to draw a large crowd, requiring lower conversion rates) or a narrower range (but hope for a higher conversion of those customers/visitors that do visit).

I highly recommend making use of an SEO plugin on your website. Yoast SEO is the most popular. When you activate Yoast SEO, you will find tools at the bottom of each of your posts, pages, portfolios, etc, to help you to maximise your Search Engine Optimisation on that page.

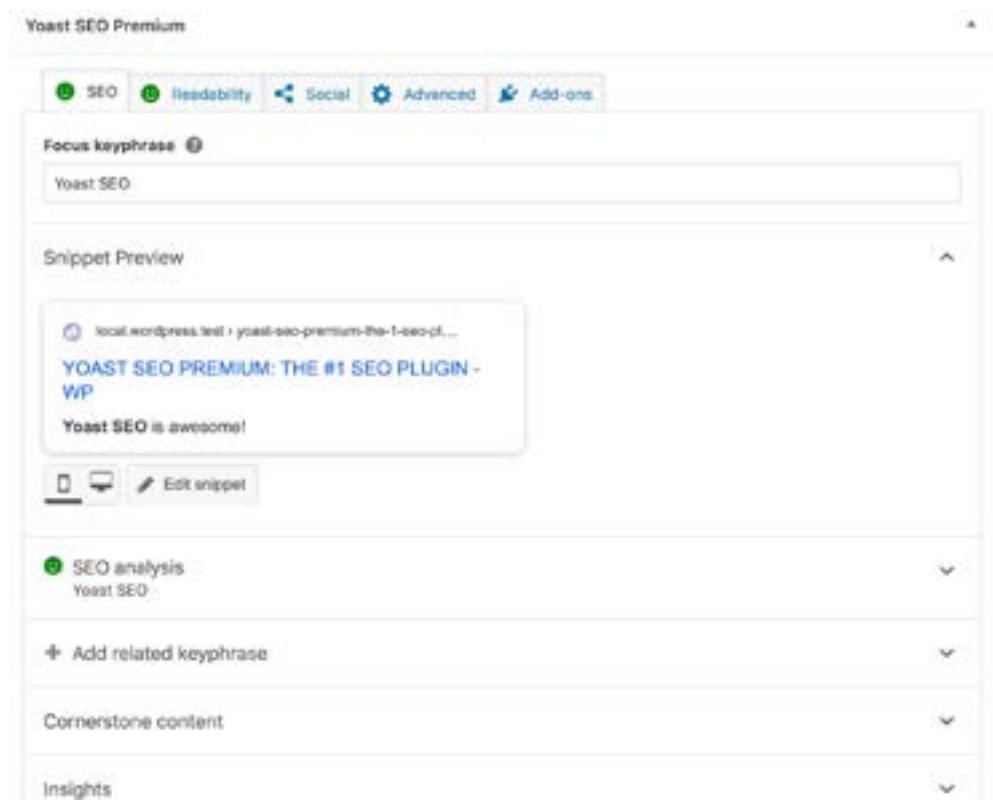
# SEARCH ENGINE OPTIMISATION (SEO)

## ALT TEXT

ALT text is the wording that sometimes pops up if you hover your mouse over an image on the internet. It is a short description of the image. ALT text is important for two reasons. First, it enables blind internet users or users who have images turned off on their computers know what the image pictures, making the website more accessible. It is also a great way to increase your website's search engine rankings. You can include ALT text in your images in the Media section.

ALT text should be a simple description of what a picture contains, for example 'Green boat with bananas in Amsterdam', rather than 'green-boat'. Good alt text should not be vague, but shouldn't be spammy. ALT text helps provide context for images, which help users find their way to relevant content when searching (e.g. it may not be obvious from looking of the boat alone that the boat is in Amsterdam, but Amsterdam may be of interest to visitors to your site).

If you find the idea of SEO scary, try adding the Yoast SEO plugin. It will walk you through optimising your website's SEO page by page - and it's free!



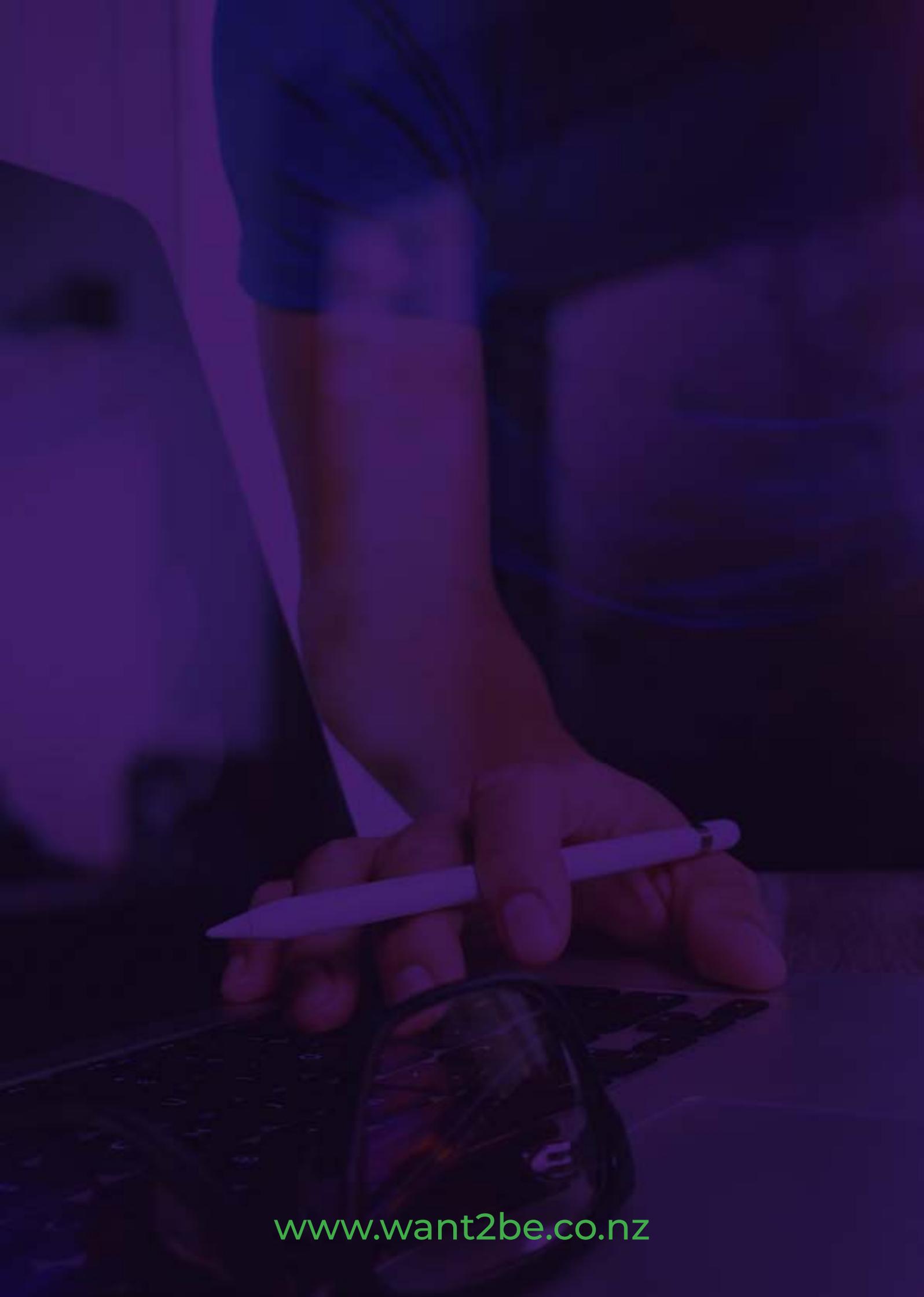
## ARE YOU STUCK? I CAN HELP!

Drop me an email if you have a question or need a hand. I offer up to a half hour Wordpress consultation and advice for \$35 NZD.

Complete web design packages start from \$20 month for 12 months.

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