

Instructions for WordPress WBCCI Unit Membership, Member Logon, and Rally Schedule Plugins

Activation, Setup and Data Entry

Summary

This document contains the instructions needed for your unit/club webmaster to activate and set up the WBCCI Unit Membership Plugin, the WBCCI Member Logon Plugin, and the WBCCI Rally Schedule Plugin. When followed, the features of the plugins will be fully functional on your unit/club website.

ALL three plugins were designed to work together. However they can be implemented partially in the following combination, based on your club's needs:

1. WBCCI Unit Membership Plugin by itself
2. WBCCI Unit Membership Plugin and WBCCI Member Login together

All three of these custom WordPress plugins, written by WBCCI volunteers, have the following attributes:

- integrate seamlessly into your existing WBCCI unit/club website, which is based on WordPress
- format beautifully on your smartphone, tablet, laptop and desktop devices
- when used together, assure the privacy of your members' data

WBCCI Unit Membership Plugin.

If you have ever been on a WBCCI Caravan, you know that the caravan leaders provide a driver's manual that has a photo of the members of each rig along with a biography. This is helpful to put a name to a face as you get to know your fellow caravaners. Wouldn't it be nice to have something similar so that you could get to know your unit/club members better?

This plugin serves that same purpose and more. It:

- has a search feature that you can use to find the name of someone's spouse, quickly look up a member's address to send a birthday card, find out who lives in the same city as you, or dive deeper and find out more about an individual member, depending upon how your unit/club wants to use this tool.

WBCCI Member Logon Plugin.

This plugin provides the ability for a webmaster to password-protect individual pages which are accessible by individual member who can create and maintain their own individual passwords to logon. The benefits of this plugin are:

1. Allows unit/club members to set their own individual account passwords and reset them, via a link in an email, if they have forgotten, without any admin help.
2. Password protects the list of unit/club members and personal details from the public.
3. Once logged in, automatically populates the rally registration fields using the member's information as defined within the WBCCI Unit Membership Plugin functionality.
4. Password protects the list of individual rally attendees from the public. (future feature)

WBCCI Rally Schedule Plugin.

This plugin allows your webmaster to create and maintain rallies to be displayed on the website by entering key standardized rally information. When saved, all rallies are listed together in summary form with a photo. When an individual rally is clicked on, the rally details are displayed, along with the ability for anyone to register for that rally.

This plugin replaces your current website's rally information page. The benefits are:

- Standardized formatting
- Interactive Google map with zoom
- List of attendees who have registered online, so everyone knows who is coming and what they are bringing for a pot luck

WBCCI Unit Membership Plugin

Activation

1. Login to the admin area for your Unit's Wordpress website
 - a. <your-website-url>.airstreamclub.net/wp-admin>
2. From the Dashboard menu, select "Plugins"
3. Scroll down to the plugin "WBCCI Unit Membership" and click on the "Activate" link.
4. This adds two new sections to your Dashboard menu:
 - a. Settings/Unit Member – this is where you set up the default Image URL
 - b. Members – this is where you add/edit/delete members

Setup

Add Unit Members Page to Your Unit/Club Website

[unit_members]: Page Name = _____

1. From the **Dashboard**, select **Pages / Add New**.
2. In the field that says "**Enter title here**", name the page something like "Member Directory" or "Member Photo Directory". You can always change this later.
3. In the main body of the page, enter the following text **[unit_members]** (include brackets and underscore). This is the shortcode that will add all the functionality to the page.

4. **Password Protect** the page:

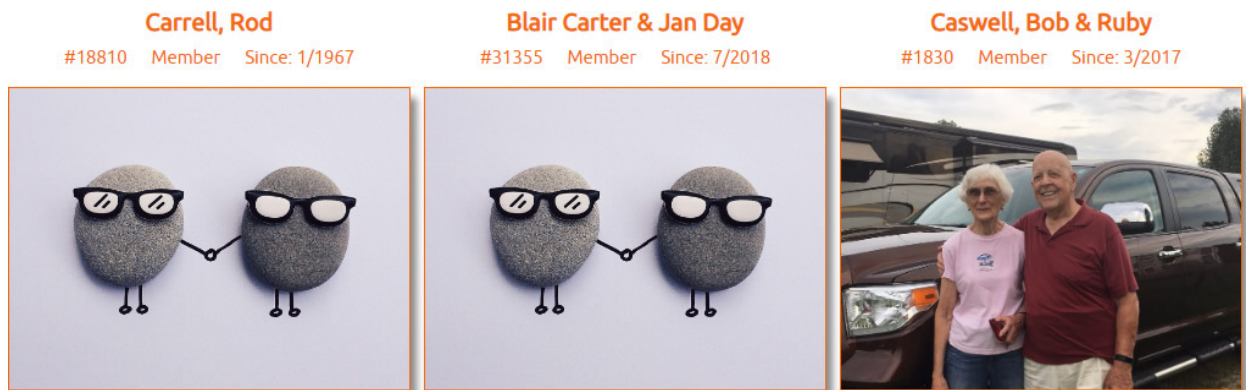
NOTE: Follow this method to password protect your Membership area ONLY IF you plan on implementing JUST the Membership plugin (without the Rally Schedule plugin) OR you desire to have a single group password shared by all instead of using the Login plugin, which implements individual passwords for everyone to create and manage on their own.

- a. In the **Publish** area of the page, locate the field **Visibility: Public** and click on the **“Edit”** link.
- b. Select the option **“Password protected”**. This will display a field for you to enter a password.
- c. Enter a password.
NOTE: This is a global password to be shared with your club. If you want individual passwords, then activate the WBCCI Logon Plugin instead.
- d. Click **“OK”** to save your publish changes.
- e. Click **“Publish”** to save your page changes and go live.

5. Depending upon the theme your Wordpress site is using, one of the following will occur:

- a. The page automatically appears in your menu.
 - i. If you don't like the default order (probably at the end), then go back to edit the newly created page.
 - ii. Under the **“Page Attributes”** section, find the field named **“Order”**. Enter a number that is lower than the page that you want it to precede. You may need to open the other pages displayed in your menu and change those numbers to allow room for a new page to be inserted. (HINT: order pages in increments of 5 or 10 so you will not need to reorder in the future. You can simply insert a new page number between 5-10, for example).
- b. The page does not appear automatically in your menu. You may have a more sophisticated theme that used custom menus.
 - i. From the Dashboard, select **Appearance / Menus**.
 - ii. Find your new page listed under **“Pages”** and click on **“Add to Menu”**. You'll find it added to the bottom of the menu.
 - iii. Drag the page to reorder it in your menu.
 - iv. Click on **“Save Menu”**

Set up Default Graphic in Settings/Unit Member



This section has only one purpose – to allow you to specify a link to a .jpg for a default image. This only needs to be done once. The image you choose to setup here will be displayed for all members, automatically, who have not provided a custom photo for you to upload. It will be overridden, when you do upload a custom photo for them from the “Members” section. This is a necessary setup step so that an image displays by default. You can change this default image anytime, globally for everyone, by simply changing the link to a different photo.

1. Find an appropriate default image. It must be royalty free or purchased, to avoid any financial penalties, or a personal photo that you or someone in your club took and has given you permission to use.
2. Upload that image to the Media library.
 - a. Choose “**Media**” from the Dashboard menu.
 - b. Click on “**Add New**”.
 - c. Drag and drop a file anywhere to upload or click on “**select files**” to upload.
 - d. In the **Attachment Details** page, find the URL for the photo. Copy that link by highlighting the link and pressing <Control-C> or clicking the right mouse button to display a secondary menu – click on “copy”.
 - e. Close the image window by clicking on the “**X**”.
3. Select “**Settings / Unit Member**” from the Dashboard.
4. Paste the URL that you just copied into the field “**Default Image URL:**” by pressing <Control-V> or clicking the right mouse button to display a secondary menu – click on “paste”.
5. Click on “**Save Changes**”

Add Members

NOTE: In general, enter date formats as specified in the field prompts: ex MM/DD/YYYY vs MM/YYYY). Invalid dates will not be saved and will appear empty when displayed in the public site.

After adding a new member, always look at it from the public site to verify your data entry. If something is missing or incorrect, come back to the admin area and edit the member.

1. From the Dashboard, select “**Members / Add Member**”

2. **Enter Title Here.** Where it says “Enter title here”, enter a unique title, such as the members’ LAST NAME, FIRST NAMES (ex. Ricardo, Ricky & Lucy). This field is not displayed in the public site. It is used for Wordpress to create a unique page name used in the URL.
3. **Primary Member & Secondary Member**

NOTE: This plugin accommodates all kinds of family units (single vs partners; shared vs different last names, etc.)

For formatting purposes, enter BOTH first and last names for primary AND secondary members, even if the last name is the same for both. Doing so will have it display as:

- 1 **Shared Last Name:** Ricardo, Ricky & Lucy on the summary page and Ricky Ricardo and Lucy Ricardo on the detail page
2. **Different Last Name:** Ricky Ricardo & Lucy Arnaz on both the summary and detail pages.

If you instead enter just the Secondary Member’s first name, then it will appear as Ricky Ricardo & Lucy on both pages.

- **First Name.** This field is searchable. See notes above.
- **Last Name.** This field is searchable. See notes above.
- **Birthday.** MM/DD/YYYY. Enter the primary or secondary member’s birthday. If your club chooses not to ask for or disclose birth years, then enter an obviously incorrect year, such as “0000” or “9999” for the year, and check the following box.
- **Hide Year.** Check this box if your club chooses not to show years for birthdays.

4. General Member Information

- **Member’s Anniversary.** MM/YYYY. This is the date of an important anniversary the couple wishes to celebrate (e.g. wedding, meeting, getting their Airstream, etc). If your club chooses not to ask for or disclose anniversary years, then enter an obviously incorrect year, such as “0000” or “9999” for the year, and also check the following box. NOTE: This can be used by your club’s “Sunshine Committee” who sends members cards on their birthdays and anniversaries.
- **Hide Year.** Check this box if your club chooses not to show years for anniversaries.

5. Membership Information

NOTE: The first three fields appear on the summary page above the photo.

- a. **Membership Number.** This field is searchable. Enter the member’s WBCCI number.
- b. **Membership Type.** Select one of the following:
 - i. Member
 - ii. Affiliate Member
 - iii. Lifetime Member
 - iv. Friend of the Unit

- c. **Member Since.** MM/YYYY. Enter the date that the member joined WBCCI. This can be gotten from WBCCI headquarters by requesting a Stars Report for your club/unit.
- d. **Last Renewal Date.** MM/YYYY. Enter the date that the member last renewed their annual membership.

NOTE: If you don't want or need to track down to the month level, then simply put "01" for all members to reflect that the membership is good starting in January of that membership year.

6. Member Address.

- a. **Street.**
- b. **City.** (this field is searchable)
- c. **State.**
- d. **Zip Code.**

7. Phone Numbers.

NOTE: This is very flexible in how it can be used, depending upon what you put in the Label fields. Use any formats you want. Ex. Home. Cell. Vs. Ricky Cell. Lucy Cell.;

- a. **Phone Number 1.**
- b. **Phone Number 1 Label.**
- c. **Phone Number 2.**
- d. **Phone Number 2 Label.**

8. E-Mail Addresses.

NOTE: This is very flexible in how it can be used, depending upon what you put in the Label fields. Use any formats you want. Ex. Ricky. Lucy. Vs Work. Home. Vs Ricky's email. Lucy's email)

- a. **E-Mail Address 1.**
- b. **E-Mail Address 1 Label.**
- c. **E-Mail Address 2.**
- d. **E-Mail Address 2 Label.**

9. Member Notes.

NOTE: This can be used for any purpose your unit/club decides. Ideas are:

- a. Formal biography of the members, submitted by the members. OR
- b. Notes showing that they are a past president, past treasurer, caravan leader, experienced caravanner, expert in batteries / solar, likes to boondock, etc.

10. Member Photo

- a. From the Feature Image section (located in the right column, bottom of the member record) click on **Set Featured Image.**
- b. Click on the "Upload Files" tab (if you have **not** already added it to the Media Library) OR Media Library tab (if you have already uploaded it to the Media Library) to select it – bypass step C.)
- c. Upload the members' image to the Media library.
 - i. Choose "**Media**" from the Dashboard menu.
 - 1. Click on "**Add New**".
 - ii. Drag and drop a file anywhere to upload or click on "**select files**" to upload.

- iii. In the **Attachment Details** page, find the URL for the photo. Copy that link by highlighting the link and pressing <Control-C> or clicking the right mouse button to display a secondary menu – click on “copy”.
- iv. Close the image window by clicking on the “X”.
- d. Click on “Set featured image:” to choose that image.

11. SAVE the Member Record.

- a. From the Publish area, click on **Publish**.

Edit Members

1. From the Dashboard, select “**All Members**”. This displays a list of members in the reverse order that they were created (last at the top of the list). If you want to see those members that you first entered (now at the bottom of the list), enter a page number in the field located in the upper right of the page or click through each page by clicking on the arrow.
2. You can find a specific member several ways:
 - a. Sort by clicking on the column heading (primary, secondary, type, since, last renewal.
 - b. OR enter a first name or last name into the search box in the upper right of the screen and click on “Search members”. It returns a subset that matches your search criteria.
3. To edit the member’s data, hover your mouse over the member name in the list and click on “edit”. Do not use the “quick edit” link.
4. This displays the members data. Make appropriate changes, following field directions from “Add Members”.
5. Click “Publish” to save.

Delete Members

1. Follow steps 1-2 under Edit Members to find your member.
2. To delete the member’s data, hover your mouse over the member name in the list and click on “Trash”. You will not be prompted to confirm. However, if you make a mistake, you will find the record under “Trash” in the top left of the page above the list of members. You can restore it from here.

Change Member Status to Inactive / Active

NOTE: You would use the “draft” feature to hide members from the public website that have not renewed by January of the New Year. This way, when they do renew, you can simply publish their record to reactivate them and not have to reenter all their information again.

1. Follow steps 1-4 under Edit Members to find your member.
2. In the **Publish** area, find the field called “**Status: Published.**” Click on **Edit**.
3. Change the dropdown selection from Published to **Draft**. (To Reactivate later, change the dropdown selection from Draft to Published.)
4. Click “**OK**” to save setting.
5. Click **Update** to Save status change to member record.

WBCCI Member Logon Plugin

Activation

1. Login to the admin area for your Unit's Wordpress website
 - a. <your-website-url>.airstreamclub.net/wp-admin>
2. From the Dashboard menu, select "Plugins"
3. Scroll down to the plugin "WBCCI Member Logon" and click on the "Activate" link.
4. This adds a new section to your Dashboard menu:
 - a. Settings/Member Logon – this is where you tell Wordpress which custom pages (that you will create in the next section) to use for implementing secure logins so you can self-register for rallies.

Setup

[member_logon]: Page Name = _____

[member_lost_password]: Page Name = _____

[member_reset_password]: Page Name = _____

Add Logon Page to Your Unit/Club Website

1. From the **Dashboard**, select **Pages / Add New**.
2. In the field that says "**Enter title here**", name the page something like "Member Login". You can always change this later.
3. In the main body of the page, enter the following text [member_logon] (include brackets; include underscore). This is the shortcode that will add all the functionality to the page.
4. Click "**Publish**" to save your page changes and go live.
5. A "WBCCI Unit Login" link will appear at the top of your website. Optionally, you could ALSO add this page to your menu structure. Follow the directions under the WBCCI Unit Membership Plugin on how to add a page to your menu.

Add Lost Password Page to Your Unit/Club Website

1. From the **Dashboard**, select **Pages / Add New**.
2. In the field that says "**Enter title here**", name the page something like "Member Lost Password". You can always change this later.
3. In the main body of the page, enter the following text [member_lost_password] (include brackets; include underscore). This is the code that will add all the functionality to the page.
6. Click "**Publish**" to save your page changes and go live.
7. This feature is accessible from a link at the bottom of your Login page. Optionally, you could ALSO add this page to your menu structure. Follow the directions under the WBCCI Unit Membership Plugin on how to add a page to your menu.

Add Reset Password Page to Your Unit/Club Website

NOTE: This page is never displayed on your website's menu. It is a support page used by the plugin.

1. From the **Dashboard**, select **Pages / Add New**.

2. In the field that says “**Enter title here**”, name the page something like “Login Reset Password Support Page”. You can always change this later.
3. In the main body of the page, enter the following text [member_reset_password] (include brackets; include underscore). This is the code that will add all the functionality to the page.
4. Click “**Publish**” to save your page changes and go live.

Set up Default Values in Settings/Member Logon

This section does two things – to specify which custom pages you created for the Member Logon to be displayed on. This only needs to be done once.

1. Select “**Settings / Member Logon**” from the Dashboard.
 - a. **1st Dropdown** – Select the name of the page that contains the [member_logon] short code (refer to your hand-written notes in the Activation section).
 - b. **2nd Dropdown** - Select the name of the page that contains the [member_lost_password] short code
 - c. **3rd Dropdown** - Select the name of the page that contains the [member_reset_password] short code
 - d. **4TH Dropdown** – Select the position where you want the Logon Text Link to appear in the top of your website (Left / Center / Right).
 - e. **Return email address format.** If you enter nothing here, the reset password email will be from wordpress@airstreamclub.net which is an invalid email address and if someone tried to “reply” to the password reset email (which is probably unlikely) it would never be received. Instead, use the following format (Webmaster <YourEmail@abc.com>) to specify a valid email to receive any replies. (NOTE: Be sure to include the less than (<) and greater than (>) signs in the formatting. Do not include the parentheses.)
 - f. **Enable DEBUG Mode.** Do not use.
 - g. Click on “**Save Changes**”

How to Login

NOTE: There is no way to request/create a new login. Only members of the unit/club can login and all login accounts have been created by default by the unit/club webmaster as a result of members being added to the Membership Plugin database. The unique IDs of the login accounts (up to two accounts per WBCCI big red number) are for the two emails associated with the WBCCI membership. What has not been established is the password to login. See the next section below on how to do this.

How a User Initializes Their Password the First Time

1. Access the Login Screen:
 - a. Click on WBCCI Unit Logon link at the top of your webpage. OR
 - b. Click on the Register link on the [rallies] page. OR
 - c. Click on the {members_lost_password} page link if it has been added to your website menu.

2. Click on “If you have forgotten or need to reset your password click HERE” to display the [member_lost_password] page.
3. Enter the email for the account you want to reset. This email must be one of the two emails associated with your WBCCI big red number and belong to you so that you can receive an email with a reset link. This will display a message at the top of the page saying: “A password reset link has been sent with instructions to reset your password.
4. Check your inbox for a new email from the Webmaster with the subject of “WBCCI Password Reset Request.
5. Click on the link: Reset Password Here. When done, it will return you to your website’s home page.
6. At this point, go to the login screen and login with your new password, using the same email you used to reset it.

How to Password Protect a Web Page

1. From the Dashboard menu, select “Pages / All Pages”
 2. Select a page from the list of active pages and click on “edit”.
 3. In the right-hand column, look for a section titled “Enable WBCCI Member Logon Protection”.
 4. Protect This Page checkbox. Check this box to password-protect this page. Uncheck to remove the protection.
 5. Update page to save changes.
 6. At this point, the page will not be displayed on the public website unless a user has logged in to the website.
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WBCCI Rally Schedule Plugin

Activation

7. Login to the admin area for your Unit's Wordpress website
 - a. <your-website-url>.airstreamclub.net/wp-admin<
8. From the Dashboard menu, select "Plugins"
9. Scroll down to the plugin "WBCCI Rally Schedule" and click on the "Activate" link.
10. This adds two new sections to your Dashboard menu:
 - b. Settings/Rally Schedule – this is where you set up the default Maps API Key to integrate Google maps and specify which custom page to use for rally registrations.
 - c. Rallies – this is where you add/edit/delete rallies

Setup

[rallies]: Page Name = _____

[rally_registration]: Page Name = _____

Add Rally Summary List Page to Your Unit/Club Website

1. From the **Dashboard**, select **Pages / Add New**.
2. In the field that says "**Enter title here**", name the page something like "2020 Club Rallies" or "Club Events". You can always change this later.
3. In the main body of the page, enter the following text [rallies] (include brackets). This is the shortcode that will add all the functionality to the page.
4. Click "**Publish**" to save your page changes and go live.

Add Rally Registration Page to Your Unit/Club Website

NOTE: This is a support page, so you will never access it from your menu.

1. From the **Dashboard**, select **Pages / Add New**.
2. In the field that says "**Enter title here**", name the page something like "Rally Registration" or "Rally Registration Support Page". You can always change this later.
3. In the main body of the page, enter the following text [rally_registration] (include brackets and underscore). This is the code that will add all the functionality to the page.
4. Click "**Publish**" to save your page changes and go live.

Set up Default Values in Settings/Rally Schedule

This section does two things: specify a Maps API Key so that the plugin can use Google maps AND specify which custom page you created for the rally registration to be entered on. This only needs to be done once.

1. Select "**Settings / Rally Schedule**" from the Dashboard.

2. Select the **General Options** TAB
3. **Google Maps - Maps API Key.** Copy/Paste the following key into the field, make sure you do not have any leading or trailing spaces:
 - a. AlzaSyCy-ghcmeZa6AUo3RrIhX2LDY23EtWvXWQ
4. Rally Registration Form – Registration Form dropdown.
 - a. Select the name of the Rally Registration page you created previously.
5. Click on “**Save Changes**”

Rally Registrations TAB

<TBD>

Add Rally

NOTE: Only the unit/club webmaster can add/edit/delete a rally.

After adding a new club rally, always look at it from the public site to verify your data entry. If something is missing or incorrect, come back to the admin area and edit the rally.

- From the Dashboard, select “**Rallies/Add Rally**”
- **Add Rally.** Where it says “Add title”, enter a unique rally title, such as “Boondocking by the Lake”.
- **Rally Start Date / Rally End Date**
 - a. Click on the date field and a calendar will appear. Select the appropriate start/end dates.
- **Rally Host**
 - Enter the name(s) of the individuals planning the rally
- **Host Contact Email**
 - a. Enter the email of the primary contact for the rally should there be any questions.
- **Rally Co-Host**
 - a. Enter the name(s) of the co-hosts planning the rally
- **Campground Website**
 - a. Enter the website URL for campground details/reservations (use http://)
- **Campground Phone Number**
 - a. Enter the phone number of the campground
- **Rally Address Street / City / State / Zip**
 - a. Enter the address of the campground / location of the rally
- **Open text area**
 - a. Enter any additional details about your rally here. Suggestions include:
 - i. A leading sentence to get them excited about the rally.
 - ii. Activities / Seminars / Sightseeing / Campground Amenities / Menu Themes
 - iii. Schedule
- **Featured Image (in the right column)**
 - a. Set Featured Image. Click on link.
 - b. Either select an appropriate image from your Media Library, or upload a new image that will best show off your rally’s personality.

- c. Click “Set featured image” button to save.
- **SAVE the Rally Record.**
 - a. From the Publish area, click on **Publish**.

Edit Rally

1. From the Dashboard, select “**All Rallies**”. This displays a list of rallies in the reverse order that they were created (last at the top of the list). If you want to see those rallies that you first entered (now at the bottom of the list), enter a page number in the field located in the upper right of the page or click through each page by clicking on the arrow.
2. You can find a specific rally several ways:
 - a. Sort by clicking on the column heading (Title).
 - b. OR enter a word into the search box in the upper right of the screen and click on “Search rallies”. It returns a subset that matches your search criteria.
3. To edit the rally’s data, hover your mouse over the rally name in the list and click on “edit”.
4. This displays the rally data. Make appropriate changes, following field directions from “Add Rally”.
5. Click “Publish” to save.

Delete Rally

1. Follow steps 1-2 under Edit Members to find your rally.
2. To delete the rally data, hover your mouse over the rally name in the list and click on “Trash”. You will not be prompted to confirm. However, if you make a mistake, you will find the record under “Trash” in the top left of the page above the list of rallies. You can restore it from here.

Past Rallies

1. HIDE. Automatically, rallies older than two months will no longer display to the public website.
2. REUSE DETAILS. The information is still accessible from the Admin area to reuse for future years. Simply change the relevant details such as the date and delete all the participants.

Maintain Rally Registrations

NOTE: Admin only

1. **Rally Schedule Settings Page:** Click on Settings/Rally Schedule to display the Rally Schedule Settings Page
2. Rally Registrations Editor: Click on the Rally Registrations tab to display the Rally Attendees Editor
 - a. Delete: Hover over the rally name and the matching attendee you want to delete, then click on “Delete”.
 - b. Edit: It is not possible to edit an attendee’s information.

CLUB MEMBER USE

Event Summary Page

1. Click on the menu item to display your club's events summary page.
2. Club Events Page. This page will provide a summary list of all the rallies or luncheons that have been entered into the website, including:
 - a. Event name
 - b. Event date(s)
 - c. Event host names
 - d. Event co-host names

Event Details Page

1. From the Events Summary Page, click on one of the following to display the Event Details page:
 - a. Event Title
 - b. "Rally Info" link for that event.
2. Once on the Event Details Page, the Event Title will be at the top of the page with the following details listed:
 - a. Interactive Map with zoom capability
 - b. Rally Details section with
 - i. Register link <insert more info>
 - ii. Rally Campground: Name of the campground
 - iii. Campground Website Link for registration online
 - iv. Start Date
 - v. End Date
 - vi. Rally Hosts Name(s)
 - vii. Contact: for rally hosts
 - viii. Rally Co-Hosts Name(s)
 - ix. Campground Phone Number
 - x. Campground Address
 - c. Attendees section – lists members who have self-registered online
 - i. Name
 - ii. Number in Party
 - iii. Site: campsite number
 - iv. Arrival: date of planned arrival
 - v. Depart: date of planned departure
 - vi. Side Dish: shows what they plan to bring for the Pot Luck to avoid duplication
 - d. Additional information – this is a free form area to include whatever else should be communicated about the event, such as
 - i. Schedule of activities
 - ii. Seminars / Sharing sessions
 - iii. Written directions
 - iv. Fees
 - v. What else to bring