# Neighborhood Council SOP

# Add a Committee

1. Go to Committees
2. Click the +Add Committee
3. Enter SEO URL (this will be the URL for the page)
   a. Shorten the name of committee. Example: Executive Committee can be displayed as Executive
4. Enter Committee Name, select if you want it featured on Committee page/ Achieved, select Committee Type, enter main content
5. SEO settings: Skip this
6. Auto Email Agendas & Resource files (**Optional)**
   a. Auto Email Agendas will automatically email an individual the agenda
      i. For example: instead of separately emailing the city the agenda you can select this option to email the agenda
7. Copy the SEO URL and go to Pages > Top Navigation
8. Scroll to the bottom and add the committee as a new page
   a. Enter Title (This will be committee name)
   b. Select the Parent Menu you want the committee to be displayed
   c. Enter the SEO URL in Link field
   d. Select Target (If the page should open in a new tab or current tab)

# Edit Committee Information

1. Go to Committees
2. Click the icon under the Edit column for desired committee

# Add a New Meeting

1. Go to Committees
2. Click the + icon under the Add Meeting column for desired committee
3. Enter meeting Date, Start/End time, Meeting Title, Location (optional, can be physical location or Zoom meeting ID), Description
4. Display on Calendar: select Yes if the meeting should be displayed on calendar
5. Click Submit to be directed to a new page to upload agenda
   a. Select file type. **Please note:** if a meeting does not have an agenda it will not be display on the committee page
   b. Upload or drag and drop the agenda
   c. Upload additional documents. **Please note:** only "Other" file category can have a custom file name. Agendas and Minutes will be displayed as "Agenda" and "Minutes"

      d.   Click Submit

# Upload Agenda/Documents to an Existing Meeting

1. Go to Committees
2. Click on icon under the List Meeting column for desired committee
3. Click on the icon under the Attachments column for desired meeting date
4. Select File Category
       e.   Enter File Title. **Please note** only "Other" file category can have a custom file name. Agendas and Minutes will be displayed as "Agenda" and "Minutes"
5. Upload or Drop and Drop File
6. Click Submit

# Edit Existing Meeting

1. Go to Committees
2. Click the icon under the List Meeting column for desired committee
3. Click the icon under the Edit column for desired meeting date

# Website Default Navigation Menu

1. Go to pages
2. Activate or de-active a system page by clicking the icon on the right
3. To edit a system page, click on the edit icon
4. Homepage
   a. Drag and Drop JPG file (Recommended dimensions 1200 x 550)
   b. Click the icon under Order to change the order placement
   c. To add text on the image, click the Edit icon on the desired image
5. Gallery
   a. Click +Add Category to create a new category
   b. Enter Category Name
   c. Active: select Yes if it should be active to display on the site
   d. Drop and Drop or Upload JPG's
      If a new category is not needed, click on the edit category icon for existing Gallery
   e. Click the icon under Order and move to change order placement
6. FAQ
   a. Enter Question and Answer then click Submit

b.  Click the icon under Order and move to change order placement
7.  Links
   a.  Click +Add Link Category for new link category
      i.  Enter Category Name (Description is optional)
      ii.  Active: select Yes if it should be active
   b.  After the category is created, enter the Link title and URL
   c.  To edit existing links, go back to main link page and click on the edit icon next to the category and update the links

# Custom Pages

1.  Go to pages
2.  Scroll down and click +Add Page
3.  Enter Page Title
   a.  SEO URL is based on the page Title
4.  Add page content or Resource Files and submit
5.  Once you submit you will be provided with a link under SEO URL
   a.  Copy the URL and go to Pages > **Top Navigation**
6.  Scroll Down to Add/Edit Menu
   a.  Enter Title
   b.  Select Parent Menu (where the page will be located)
   c.  Paste the URL from #5a to link
   d.  Target: select if you want the page to open in a current or new tab
7.  To edit the location or title of a current page click the edit icon, scroll to the end of the page

# Calendar

1.  Go to Calendar
2.  Categories: click +Event Categories to create a new category or edit existing categories. **Please note:** Meetings and News events are default system categories. You will not be able to add an event unless a category is added
   a.  Click +Add Category
      i.  Enter Category Name
      ii.  Select Color
      iii.  Active: select if the category should be active or not
3.  Click +Add Event to enter an event for an existing category
4.  Alternative method: Click + icon on a specific date to add an event

# News

1. Go to News
2. Click +Add News
3. Enter News Title, Date, Featured On (select if it should be featured on Homepage/Calendar), Short Copy, Main Copy, Resource Files (optional, must be an image or PDF)
   a. SEO URL and SEO settings are **optional**
4. To edit or delete an existing news item, click the edit icon on the right of the post

# Settings

**Logo:**

Recommended Dimensions 1200(Width) x 550(Height)

1. Light Logo is for the top navigation **Please note:** If the logo is all white, it will appear as if the field is empty
2. Dark Logo is for the footer

**Contact Settings:**

Updates the contact page, phone number, address, description.

1. Disregard the re-captcha key. This is used by TWC.
2. Email modification manages who will receive emails for the contact form, agenda request and board page (if an email is not specified for a specific user).

**Newsletter:**

If the NC has Mailchimp or Constant Contact form they want to integrate, the embedded code needs to be added. If not, the mailing list can be downloaded.

**Analytics:**

Enter Google Analytics or Facebook Pixel code here to track site analytics.

**Social Media:**

Manages social media links

**URL Generator:**

Provides a link to PDF's if needed.

1. Enter title for file
2. Upload PDF and save
3. Copy the link and paste to desired area

**News Settings:**

Ability to limit the number of news items on homepage and default a thumbnail photo if news item doesn't have an image
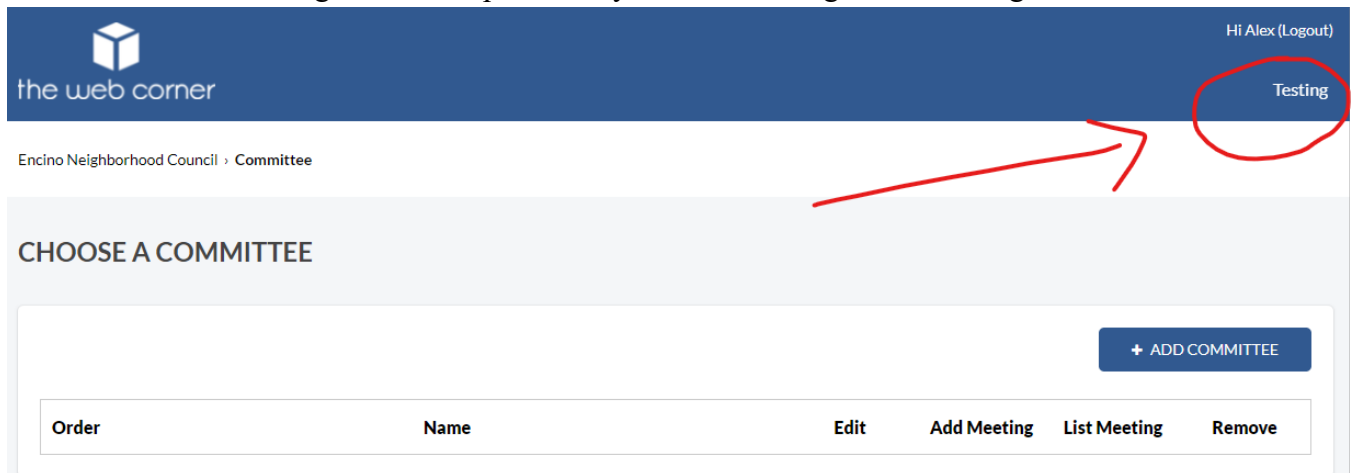
**Admin Top Navigation:**

Ability to manage the top navigation for the admin and choose access level

1. Add title, link and select access level

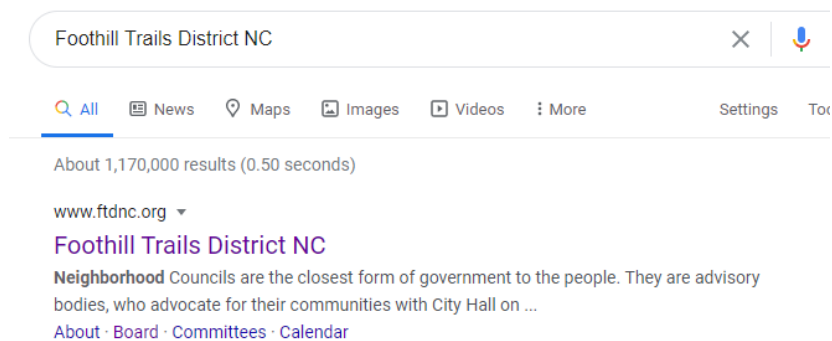Access Type: For whom the navigation menu should appear to once they log in.

Example:
- Create a **title**: Testing with a **link:** /page/viewPage/testing
- **Access Type**: Chair
- When a Chair logs in to their portal, they will see Testing on their navigation menu:

**SEO:**

Manages the settings for what is displayed when Googling the NC. Example:



**Favicon:**

Manage favicon by uploading image (this is the icon that appears on browser tabs, bookmarks, toolbar apps, history results, and search bars)

**Email Templates:**

What is it: Create email templates that are used for **committee page** and a **user page**:

Under each committee we can configure these emails to go out when:

1. An agenda/minute has been uploaded.
2. 24 hour email notice prior to a meeting.
3. 5 days email notice prior to a meeting.

For a user, we can send an email when we add a new user (ex: a warm welcome message or directions).

How to create an email template:

1. Settings -> Email Templates
2. Add Template
3. The placeholders on the left panel may be used accordingly on title, subject, and body.
4. Save changes.
5. See examples for all three below:

**Example: 24 hours notice**

TITLE

24 hour committee meeting reminder (internal list)

SUBJECT

You have a meeting that will start in the next 24 hours

BODY

Hi Committee Member,

This is a reminder that %%COMMITTEE_NAME%% meeting will start in the next 24 hours.

Meeting time:
%%MEETING_START_TIME%%

Link to Agenda:
%%COMMITTE_PAGE%%

**Example: 5 days notice**

TITLE

5 days prior notice to post an agenda

SUBJECT

Reminder to post an agenda

BODY

Hi %%COMMITTEE_LEADER%%,

This is a reminder to post the agenda for the:
%%COMMITTEE_MEETING%%.

The meeting is scheduled to take place on:
%%MEETING_DATE%%

Please post the agenda 72-hours prior to advance.

Thank you

**Example: A welcome message for a new user**

TITLE

Welcome message to stakeholders

SUBJECT

Welcome, %%NEW_USER_NAME%%!

BODY

Hello, %%NEW_USER_NAME%%

We are delighted to have you among us. On behalf of all the members and the management, we would like to extend our warmest welcome!

To get you started in the right footsteps, we encourage you to be on the lookout for our upcoming committee meetings.

Also please remember to add your personal %%NC_NAME%% email address to your email.

<span style="color:red">Where to find the email alert settings for committee:</span>

1. Go to any committee and click edit ✎
2. Scroll all the way down
3. Click on:

CONFIGURE EMAIL NOTIFICATIONS

4. Set it up accordingly with your created email template.

<span style="color:red">Where to find the email alert settings for user:</span>

1. Go to User ✎
2. **Click on + Add User**
3. Look for **SEND WELCOME EMAIL** and choose your email template:

SEND WELCOME EMAIL?

◯ Yes   ✅ No

# COMMITTEE

**DISPLAY JOINT COMMITTEES**

Manage if the committee page should display joint committees

**DISPLAY AGENDA REQUEST CONTROL**

Manage where the agenda request goes to other than the default agenda request emails that are set up in **Settings** -> **Contact Settings** -> **Email Modifications** -> **Default Agenda Request**.

HOW TO SET DISPLAY AGENDA REQUEST CONTROL:

**Settings** -> **Committee** -> **Display Agenda Request Control** (see below):

4. Check mark **Yes**.



5. Go to **Committees** from navigation menu

6. **Click on any committee to Edit** (ex. Board)  

7. Find Display Agenda Request:



8. Toggle to **Yes**

9. **Type** in the emails of whom will receive the **Board** agenda requests.

10. **\*\* These emails will override the default emails that are set up in the contact setting <span style="color:red">DEFAULT AGENDA REQUEST</span>**.

11. <span style="color:red">DEFAULT AGENDA REQUEST</span> can be found under:

> Settings -> Contact Settings -> Email Notifications -> Default Agenda Request

# Users

1. Go to Users
2. Click +Add User
3. Enter First & Last Name, Username, Email Address, Phone (optional), Password, Profile Picture, Position, Area, and Bio
4. Select Account type
    a. Board Officer: will be displayed on the board page as Executive Member
    b. Board Member: will be display underneath Board Officer's
    c. Staff: provides access to the admin but does not display on the board page
5. Select Access Type
    a. Chairman: only has access to assigned committee(s)
    b. Admin: full access to everything
6. Committee Access:
    a. Access: this is for members with "Chair" Access Type
       The committee that is marked will display when the member logs into their account
    b. Chair: this is for members that need to be displayed as chair member on a specific committee page
7. To edit an existing user, click on the edit icon on the right
8.

## POWER ADMIN CONTROL

> What is it: This gives a user an ability that's greater than an admin.

A power admin can:
1. Change another admin's password.
2. Edit/delete backend top navigation menu.