

# NAEPC Website User Guide

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First printing, 2005.

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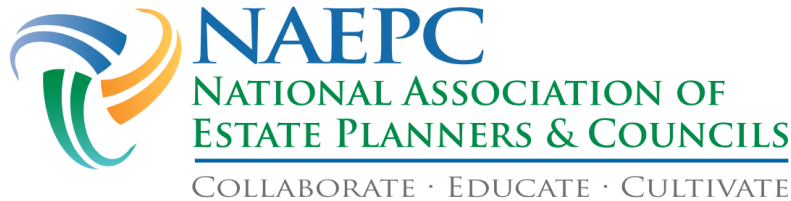
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## Welcome

We are pleased your council has decided to host its website with the National Association of Estate Planners & Councils (NAEPC). We are proud to offer constantly enhanced and affordable website options to our affiliated local councils. As you are using the site, we encourage you to communicate any ideas about new features or enhancements you would like to see implemented – your comments are valuable!

Depending upon the website level your council has chosen, you will be able to utilize a variety of tools ranging from an online membership directory and calendar of events to the ability to collect event registrations with online payment. Please see the next page for a matrix of features and capabilities available at each level.

The local council is responsible for administering the site using the web-based interface, which is accessed by logging in to your council's website. Your council chooses who receives administrative rights to your site; typically a paid administrator and/or one to two board members. You can grant administrative privileges to other members if necessary (see pages 10-11 of this manual).

Upon logging in, you will see a menu bar along the left side of your screen listing all of the administrative options. The following pages of this manual will outline each section of the menu bar and its use.

Before beginning to populate your website, we recommend that you first log in and explore each page. Clicking on and within each page will give you an idea of functionality and is a handy way to learn the site navigation. As you are exploring, you may also wish to visit examples of well-populated websites.

Level 1: [www.winnebagolandepc.council.naepc.org](http://www.winnebagolandepc.council.naepc.org) (basic package offers a web presence, event calendar and member directory)

Level 2: [www.sdestatecouncil.org](http://www.sdestatecouncil.org) (basic features + communication hub, sponsors page and document library)

Level 3: [www.epccleveland.org](http://www.epccleveland.org) (basic features + RSVP function for events and credit card payment via PayPal or administrator processing)

Level 4: [www.metrodetroitfepc.org](http://www.metrodetroitfepc.org) (all of the above features + seamless online payment transactions)

Currently your site is accessible by the public and displays all the information you provided to NAEPC, including contact information and your membership directory.



## NAEPC Website Capabilities of Levels 1, 2, 3, and 4

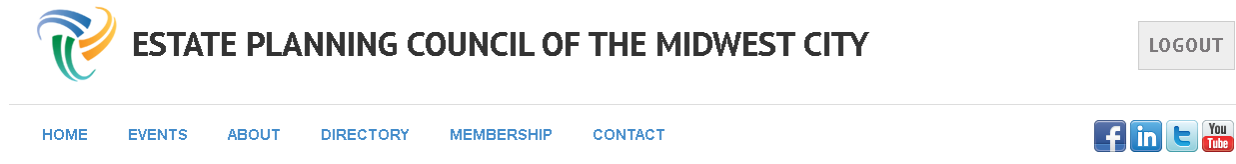
PAGE	AVAILABLE FEATURES	LEVEL	LEVEL	LEVEL	LEVEL
		1	2	3	4
Home	Provides a “local” feel with photos, logo and text	X	X	X	X
About Us	Share general information about your local council	X	X	X	X
Event & Payment Features	Post complete event details	X	X	X	X
	■ RSVP capabilities & tracking member history			X	X
	■ Secure payment acceptance or non-integrated processing utilizing PayPal			X	
	■ Secure, fully-integrated payment processing				X
	■ Accounting report			X	X
Sponsorship Integration	Promote an unlimited number of sponsors with logo/link		X	X	X
	■ Easy upload of homepage sponsors with logo/link		X	X	X
	■ Easy upload of up to 5 top of page sponsor images or logo/link			X	X
Leadership Page	Provide current leadership contact information and photo		X	X	X
Past Presidents Page	Share presidential history		X	X	X
Member Directory	Searchable and viewable with discipline categorization (up to 4 per member)	X	X	X	X
	■ Printable with tracking of past and potential members		X	X	X
Application	Provide an automated or downloadable application		X	X	X
	Integrated review and secure payment acceptance			X	X
Member Renewal	Automated renewal			X	X
	Secure acceptance of payments			X	X
Council Info Page	Have more to say? This is the place to do it!			X	X
Member Benefits	NAEPC-provided member benefits listed	X	X	X	X
	Add council-specific benefits			X	X
Document Library	Go “green” by posting articles of interest, speaker outlines, bios, etc. with the convenience of categorization and privacy controls		X	X	X
Contact Info	Council contact information	X	X	X	X
Technical Support	Available from NAEPC office	X	X	X	X

## Getting Started - Logging in to Your Council's Administrative Page

Go to your EPC website address (example: [www.epcname.org](http://www.epcname.org)) and use the **Member Login** button in the upper right corner of the homepage to access all administrative options.




After logging in as a member, look for the floating red **ADMIN** button on the left edge of your screen and click to gain access to the administrative side of your council website.



HOME   EVENTS   ABOUT   DIRECTORY   MEMBERSHIP   CONTACT

ADMIN

**FEATURED EVENTS**



**June 17, 2021**  
 Annual Goldenzweig Lecture  
 Mary Williams  
[See Event Details](#)

**Member Home**

Member since September 18, 2019  
[Edit Your Member Profile](#)

**Your Membership Renewals**

You **have** renewed your membership for the period **2020 NAEPC Dues Renewal**, which started on April 17th, 2020.

Date	Transaction	
09/21/2020	Renewal Payment - 2020 NAEPC Dues Renewal	<a href="#">View Details</a>
09/18/2019	New Member Payment	<a href="#">View Details</a>
08/07/2019	Renewal Payment - 2018-19 Renewals	<a href="#">View Details</a>

**Your Events**

You have no events.

## Website Administrators

A generic login, *Admin User*, is created when your site is launched. The *Admin User* is listed as a prospective member and in some cases may be the only person with administrative privileges. **DO NOT DELETE THIS USER FROM THE MEMBER AREA UNTIL YOU HAVE GRANTED OTHER MEMBERS ADMIN PRIVILEGES**, or you will *lose complete access* to your website. If this occurs, please contact the NAEPC technical support team to re-establish your access. NAEPC recommends that at least two, but no more than four, members (this includes a paid administrator) have administrative rights to the website. Please contact NAEPC for a listing of current website administrators for your site.

The NAEPC recommends that you review and update administrative access every year, preferably coinciding with updating your Council Leadership Team.

For technical support, contact the NAEPC office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or 866-226-2224.

## Home

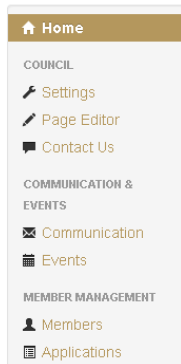
The homepage is the default landing page for administrators after logging in. The most up-to-date information concerning new features, updates, etc. will be posted here under “News for Council Website Administrators.”

As the web committee continues to work to provide additional benefits and upgrades to all the sites, this is the best place to find out the latest features available to your local council.

Below the news at the bottom of the page is a [Submit Feedback](#) button you can use to provide suggestions for improving the council website and administrative area.

Have ideas how to improve this site? [Submit Feedback](#)

The navigation pane along the left hand side is where you can access the various areas of your site. This guide is structured so that each chapter will be walking down the menu options of the navigation pane.



## News for Council Website Administrators

### Update: Logo Change For Councils That Have Not Uploaded Their Own (11/05/2020)

You will now see a change to the logo in the upper left side of your website **ONLY if your council has not uploaded its own personalized logo**. Your personalized logo will not change as a result of this update.

To keep current with NAEPC's new branding, you will see a portion of the new NAEPC logo replacing the current "key." The portion you will see does not contain the name or acronym for NAEPC. It represents the national and local core values of collaboration, cultivation and education, and also the relationship between the councils, your members, and the national association.

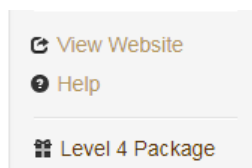
If you do NOT want to use the new logo and prefer to revert back to the key, please contact the national office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or simply re-upload it to your council's website on the "settings" tab of the administrative hub.



## Some Important Notes Before You Get Started

Unless indicated otherwise, changes made on your Council's website **will not** automatically save. To make and save changes to your Council's website, you **must** click the [Save](#) button at the bottom of the page you are editing.

You can view changes made to your website in real time (after saving your changes) by clicking the [View Website](#) link near the bottom of the menu bar on the left side of your screen.



## Council

### Settings

This tab allows you to customize the look of your homepage, including the pages that are visible to members-only, custom page titles, control of member profile information and more.

### Website Settings - Council Logo

At the top of the page you have the capability to upload your council's logo. The logo will appear in the upper left corner of your web pages as well as in your council communications and receipts. The logo you add will resize to 100 pixels wide.

**Note:** *If your council does not have a logo, we offer the NAEPC logo. Please email [councilservices@naepc.org](mailto:councilservices@naepc.org) to obtain the NAEPC logo.*

### Adding Your Council's Logo

(The logo may be in GIF, PNG, or JPEG format.)

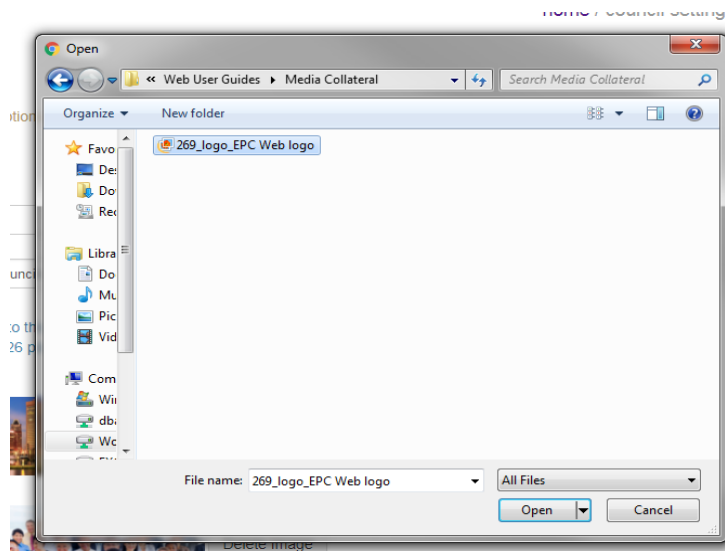
- Under Website Settings, click **Select Image** next to the Council Logo box.

## Website Settings

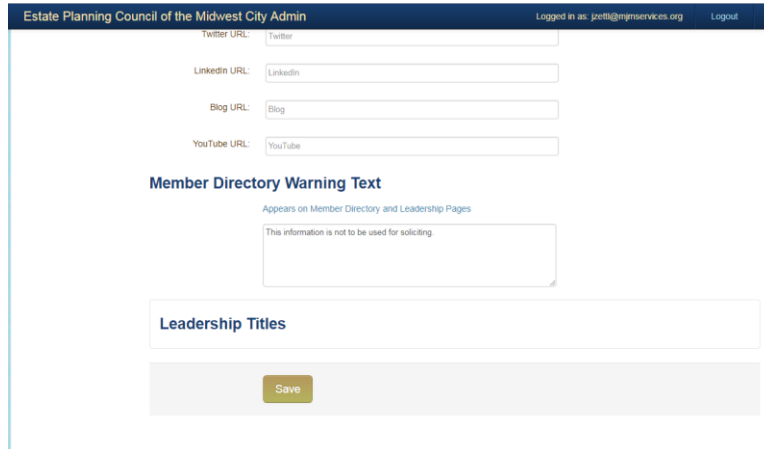
Website Package Level: 4 View Package Options


Council Logo:

- Locate your council logo on your computer and click **Open/Choose**. This will place the logo in the Council Logo box.



- Click **Save** at the bottom of the Settings page. This will post your logo on your site.



- To view your logo on your site, click **View Website** located near the bottom of the menu bar on the left side of your screen. If you do not see your logo on your public site, click the **Refresh** icon  in your web browser address bar.

*Removing Your Council's Logo*

- Simply click **Delete Image** and the logo will be removed.

Council Logo:



- Click **Save** at the bottom of the Settings page.

### Website Settings - Site Template

Here you will find a drop-down menu giving you the option to change the overall look of your council's site. This selection changes the color scheme of your website.

Site Template: Modern Blue [Preview This Template](#)

Home Page Title: \_\_\_\_\_

Home Page Image: \_\_\_\_\_

Images that will be displayed in a carousel should be the same height.

Image 1:

You can preview any color scheme by selecting it, and clicking [Preview This Template](#). A new window will open with the color scheme you have selected, temporarily applied to the page. Once you have decided which option is best for your council, click [Save](#) at the bottom of the Settings page and the website will immediately reflect the new look.

### Website Settings - Homepage Title

This should be the name of your council.

### Website Settings - Homepage Image

You may select up to three homepage images that will be displayed in a carousel offering a more local feel for your site.

#### Adding a Homepage Photo

- Click [Select Image](#) next to **Homepage Image**.

Home Page Image: You may select up to three home page images that will be displayed in a carousel. Maximum (and recommended) size for images is 1238 x 326 pixels, and all images should be the same height.

Image 1:

Select Image

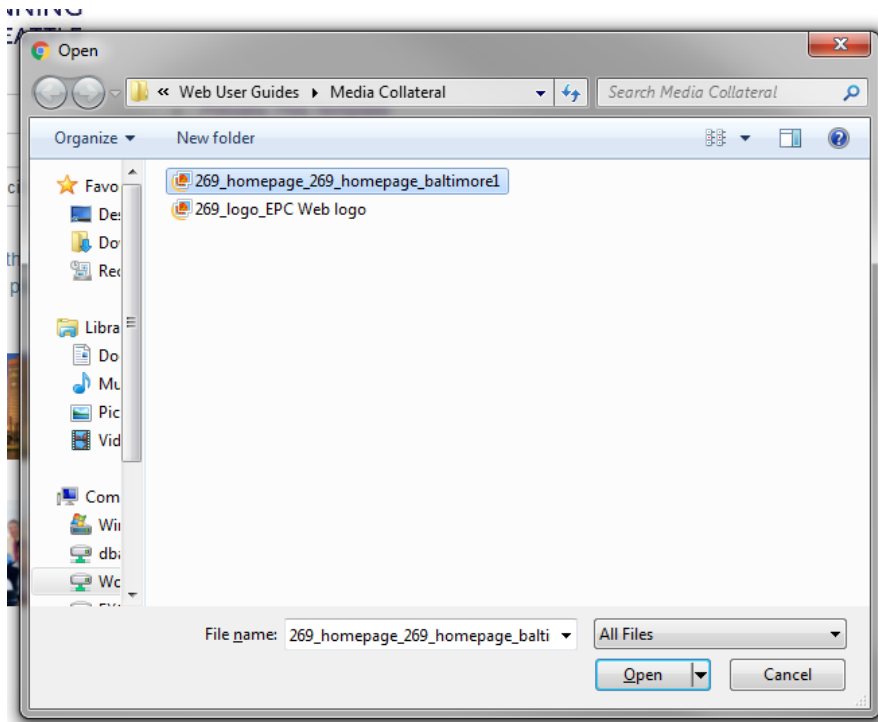
Image 2:

Select Image

Image 3:

Select Image

- Look for the photo you wish to post from your computer. Please make sure the photo is a JPEG, GIF or PNG file. Click [Open/Choose](#). You will see the photo on the Settings page. (Many chapters use pictures of their city.)




- Click **Save** at the bottom of the page. This will post your photo on your Homepage.

**Note:** Maximum (and recommended) size for images is 1238 x 326 pixels, and all images should be the same height. See page 68 for resizing instructions.

#### Removing a Homepage Photo:

- Click **Delete Image** next to the photo.
- Click **Save** at the bottom of the page.

(You might need to click the **Refresh** icon  in your web browser address bar to see the results of your changes.)

#### Sourcing a Homepage Photo

There are some websites that license stock photos (a supply of photos licensed for specific uses) that might feature a nice photo of your city skyline. If you purchase the license on a stock photo, get the lowest resolution that is still at least 1238 pixels wide. The licensing cost is usually tied to the resolution.

Here are some recommended stock photo websites:

[www.istockphoto.com](http://www.istockphoto.com) (very inexpensive, but good quality)

[www.wpanorama.com](http://www.wpanorama.com) (contains some U.S. Cities)

[www.shutterstock.com](http://www.shutterstock.com)

If you are unable to find your preferred photos, please contact the NAEPC office for assistance.

### Website Settings - Member Usernames

This provides the option to either assign email addresses as usernames, or to manage usernames manually.

- Member Usernames: [Username is used to login to your council site and this administration site.](#)
- Use Email Address as Username
  - Manage Manually via Username field on the Member Record

### Council Location

Here you have the opportunity to properly reflect the area your council serves. Type the name of the city or county, and then choose the state from the drop-down menu. This information appears on the **Find an Estate Planning Council** page of [www.naepc.org](http://www.naepc.org).

### Page Access

This section allows you to specify which website features will be viewable by members only and which are viewable by everyone. If you choose **Members Only**, you will need to distribute usernames and passwords to all of your members so they can access these pages.

The following pages on your Council's website can be restricted to Members Only access:

- Calendar & Event Detail Pages
- Leadership Page
- Member Renewal Page
- Member Directory Page
- Council Info Page
- Links Pages
- Document Library Page



*Limiting Page Access to Members Only:*

- To limit access to members only, locate the page in the column on the left.
- Next, in the **Members Only** column, you will want to click in the corresponding radio button. When a selection is activated, a dot will appear in the radio button, indicating your preference. *(If you would like to make that page accessible to the public once again, you can do so by simply clicking in the corresponding circle in the **Everyone** column.)*

Page	Visibility	
Calendar & Event Detail Pages	<input type="radio"/> Members Only	<input checked="" type="radio"/> Everyone
Leadership Page	<input type="radio"/> Members Only	<input checked="" type="radio"/> Everyone
Member Renewal Page	<input type="radio"/> Members Only	<input checked="" type="radio"/> Everyone
Member Directory Page	<input type="radio"/> Members Only	<input checked="" type="radio"/> Everyone
Council Info Page	<input type="radio"/> Members Only	<input checked="" type="radio"/> Everyone
Links Pages	<input type="radio"/> Members Only	<input checked="" type="radio"/> Everyone
Document Library Page	<input type="radio"/> Members Only	<input checked="" type="radio"/> Everyone

- Click the **Save** button at the bottom of the **Settings** page when your changes are complete.

When a page is designated as Members Only, that page will feature a login area located directly under the menu along the left of the screen on the public side of the council website.

### Displaying Pages

Each council also has the ability to turn off any pages that are not being used. These options are marked with a check box, rather than a radio button.

Page	Visibility
Calendar & Event Detail Pages	<input type="radio"/> Members Only <input checked="" type="radio"/> Everyone
Leadership Page	<input type="radio"/> Members Only <input checked="" type="radio"/> Everyone
Member Renewal Page	<input type="radio"/> Members Only <input checked="" type="radio"/> Everyone
Member Directory Page	<input type="radio"/> Members Only <input checked="" type="radio"/> Everyone
Council Info Page	<input type="radio"/> Members Only <input checked="" type="radio"/> Everyone
Links Pages	<input type="radio"/> Members Only <input checked="" type="radio"/> Everyone
Document Library Page	<input type="radio"/> Members Only <input checked="" type="radio"/> Everyone
About Us	<input checked="" type="checkbox"/> Display About Us Page
For The Public	<input checked="" type="checkbox"/> Display 'For The Public' Page
Guide To Teaming	<input checked="" type="checkbox"/> Display 'Guide To Teaming' Page
For Professionals	<input checked="" type="checkbox"/> Display 'For Professionals' Page
Committees	<input checked="" type="checkbox"/> Display Committees Page
Past Presidents	<input checked="" type="checkbox"/> Display Past Presidents Page
Services Directory	<input checked="" type="checkbox"/> Display The Services Directory
Sponsors	<input checked="" type="checkbox"/> Display Sponsors Page
Special Projects	<input checked="" type="checkbox"/> Display 'Special Projects' Page
Mailing List	<input checked="" type="checkbox"/> Display Mailing List Page
Printable Member Directory	<input checked="" type="checkbox"/> Members can View Printable Member Directory

Your Council can choose to display or not display the following pages (these options vary by website level):

- About Us
- For The Public
- Guide To Teaming
- For Professionals
- Committees
- Past Presidents
- Services Directory
- Sponsors
- Special Projects
- Mailing List
- Printable Member Directory

Leaving the boxes unchecked means those pages will not be displayed/available.

### *Some Notes about Displaying Pages*

- **Services Directory** – These pages are provided at Level 3+ websites as a service to the councils and act as an additional directory for featured members or sponsors/service providers.

In addition, some pages are pre-populated with data from NAEPC’s national site, and available on the left sidebar of your Council page. They are:

- **For The Public** – Offers helpful resources and links to estate planning related websites.
- **Guide To Teaming** – Links you to the NAEPCs philosophy on estate planning as a team.
- **For Professionals** – Offers a handy link to the NAEPC Journal of Estate & Tax Planning, along with information about the Accredited Estate Planner<sup>®</sup> designation program.

If your council wishes to deactivate any of these pages, please uncheck the box for **Display Page Name** on the **Settings** page in the left menu.

### **Page Titles**

Councils have the ability to rename the pages on their site. For example, you could change *Sponsors* to *2021 Sponsors* or *Supporters* or *Partner Program*. You can change any of the page/menu names in the Page Titles section of this guide.

Leaving a field blank, or deleting the text in the text field causes the page to go by its default name.

***Note:** On the pages that allow freeform editing via the Page Editor, you will see the default names in the drop-down menu in the Page Editor section of your website.*

### **Member Profile Self-Administration**

This section allows you to give Council members the ability to administer parts of their profile.

The two options given to Members with login credentials are:

- Members can update their profile information when logged in, or
- Member information updates will be emailed and not updated directly to the member’s profile.

The second option sends an email with requested member profile updates to the email address listed in the **General Email Address** field on the **Contact Us** page, so the administrator can make changes to the member’s profile manually.

Options that members can change themselves, if granted by your Council’s website administrators (these options are checkboxes, meaning you can grant as many or as few permissions as your Council sees fit):

- Upload Their Member Image
- Edit Their Disciplines
- Edit Contact Display and Contact Preferences
- Edit Social Media Links
- Edit Their Additional Information

- Edit Their License Numbers

## Member Profile Self-Administration

- Members can update their profile information when logged in

Members can:

- Upload Their Member Image
- Edit Their Disciplines
- Edit Contact Display and Contact Preferences
- Edit Social Media Links
- Edit Their Additional Information
- Edit Their License Numbers

- Member information updates will be emailed and not updated directly to the member's profile

### Member License Types

Councils have the ability to capture member's license number(s) and store them in this section. You decide what to name each License Type and there is no limit to the number of fields you can enter. Administrators can manually enter the number(s) or members can enter them when logged in to the website by clicking the [Edit My Member Profile](#) link on the **Member Homepage**.

### Member License Types

Available Types You may track individual license number(s) for members. Enter the license type(s) here.

License Type:	<input type="text" value="AEP Number"/>	<input type="button" value="o"/>
License Type:	<input type="text" value="Bar Association"/>	<input type="button" value="o"/>
License Type:	<input type="text" value="CPA"/>	<input type="button" value="o"/>
<input type="button" value="Add License Type"/>		

### Social Networking

Visitors to your website can easily access your council's Facebook, Twitter, LinkedIn, blog and YouTube pages by clicking the appropriate icon in the top right corner of your homepage. On the administrative side of your website you can use this area to type in the links to your social networking platforms.

- Type or paste the URL into the field next to the appropriate social media channel.  
*(When typing the URL directly into the field, you must make sure every character is accurately typed. For help capturing a URL from a website, please go to the "How to Copy and Paste a URL" section of the appendix on page 69 of this manual.)*
- If your council does not maintain a particular Social Networking site, leave its field blank.

- Click **Save** at the bottom of the page.

**Current URL Formatting for Social Media Channels**

<b>Facebook Pages</b>	http://www.facebook.com/[CouncilName]/
<b>Twitter</b>	http://twitter.com/[TwitterHandle]
<b>LinkedIn</b>	https://www.linkedin.com/company/[CouncilName]/
<b>YouTube</b>	https://www.youtube.com/channel/[ChannelID]

**Note:** If your council needs assistance with regard to social media policies and procedures, please contact [councilservices@naepc.org](mailto:councilservices@naepc.org).

### Member Directory Acceptable Use Policy

This text box is for your council to add any message deemed appropriate concerning the access of your membership directory or leadership contact information.

- Type in appropriate message, remembering that the people who see this message will be determined by your designations of *Members Only* or *Everyone* for the **Member Directory Page** and the **Leadership Page** in the page access section above.
- Click the **Save** button at the bottom of the **Settings** page.

### Leadership Titles

This section allows you to change the titles you use for your Council’s leadership team.

Access to this is at the bottom of the **Council Settings** page, and under a collapsible menu. To expand the menu, click on **Leadership Titles** and you will see a list of the titles available for use.

#### Leadership Titles

Manage the leadership titles that are available for your council members. Changes to these settings (removing, text changes) will affect your current council members.

President	↑	⊙
Vice President	↑	⊙
Webmaster 2	↑	⊙
Treasurer	↑	⊙
Secretary	↑	⊙

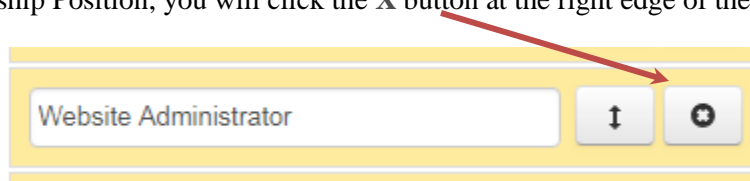
You may change the current titles by simply deleting and replacing what is in the text box.

Click **Save** at the bottom of the page.

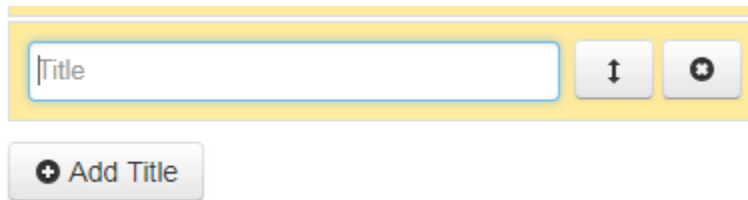
**Note:** To change the Leadership Title of a member you must go into the member's record, scroll to the bottom of the page on the **Member Information** tab and choose the appropriate title from the **Leadership Title** drop-down box.

*Adding or Removing Leadership Positions*

To remove a Leadership Position, you will click the **X** button at the right edge of the Leadership Position.

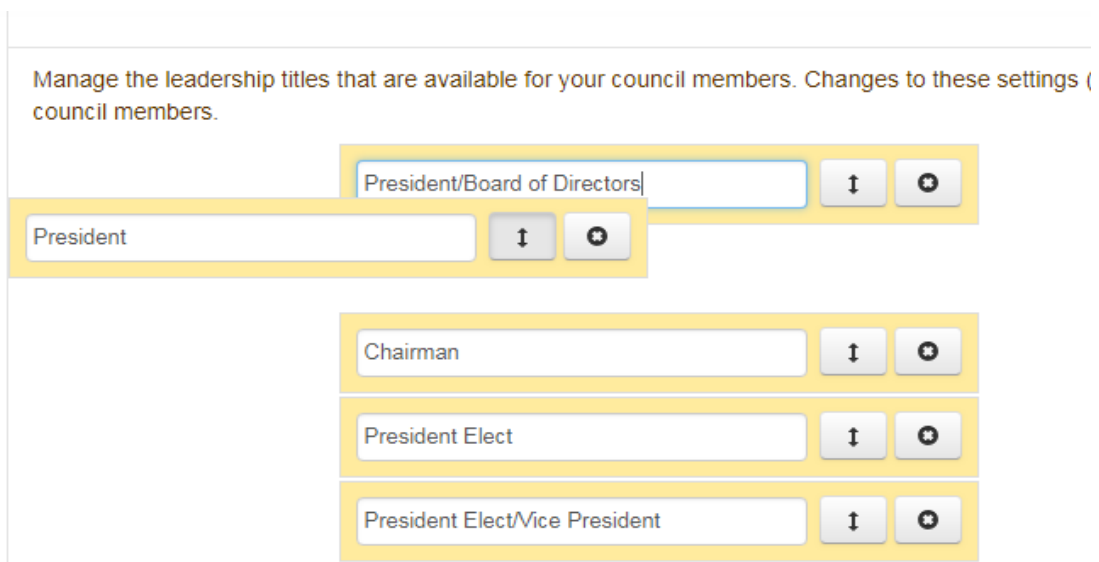


To add a Leadership Position, scroll to the bottom of the list of and click the **+ Add Title** button.



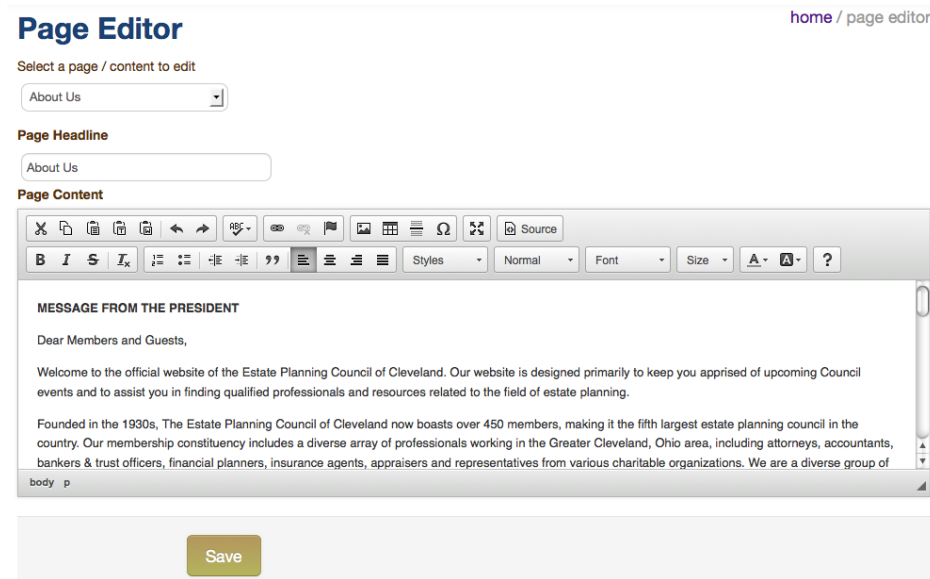
*Change the Hierarchy of the Leadership Team*

Changing the hierarchy of the Leadership Team is done by clicking and holding the arrows next to the text box. This allows you to drag the text box to the preferred place on the list. This order is the order the titles will appear on the Leadership page of your website.

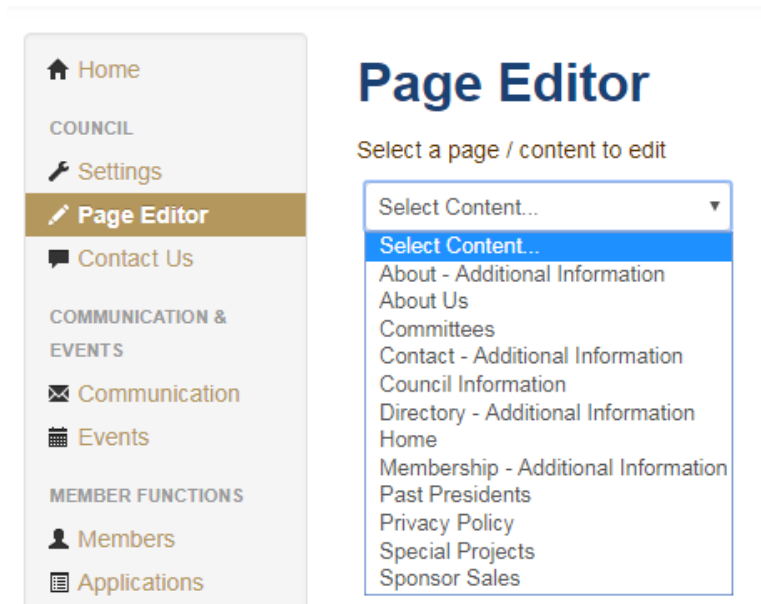


## Page Editor

This page contains a drop-down menu from which to choose the page whose text you wish to edit. When you choose a page from the drop-down menu, the **Page Editor** window appears.



The pages are titled:

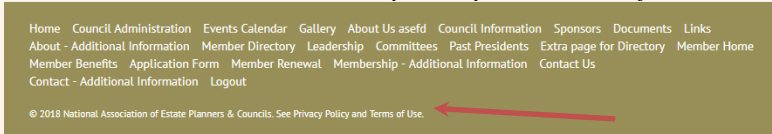


The pages can be renamed on the **Settings Page** (to learn how to change the titles of the pages of your Council's website, please go to page 19 of this guide). All pages included in this menu allow freeform editing.

***Note:** To better understand how to use the freeform editing features on your Council webpage, please see page 62.*

### Best Practices for Modifying Your Council Page

<b>About – Additional information</b>	Post your President’s Letter. Rename page to “Letter from President [Name]”
<b>About Us</b>	Post a brief history of your council; your mission, vision, and/or diversity/equity statement; include a link to your bylaws.
<b>Committees</b>	List your active committees in an effort to engage members. If doing so, please be specific about the committee charge, meeting schedule, contact person, etc.
<b>Contact – Additional Information</b>	List additional ways to contact your council, such as listing contact information for the membership chair, etc.
<b>Council Information</b>	Add any additional information about your local council such as annual awards, outreach opportunities, etc.
<b>Directory – Additional Information</b>	Post information about special groups within your council such as, emeritus and/or junior members.
<b>Home</b>	Include a welcome message, highlights of current events, profiles of council award recipients, etc. Be sure to review this information frequently so it remains current and relevant.
<b>Membership – Additional Information</b>	Highlight special projects available to your membership, such as mentorship programs.
<b>Past Presidents</b>	Create a listing of all local council Past Presidents.
<b>Privacy Policy</b>	For stock Privacy Policy language approved for use by Councils from the NAEPC, please go to the <b>Privacy Policy Stock Language</b> section of the appendix on page 67 of this document. This Privacy Policy page is accessed by clicking the link at the footer of any website page on the link “© 2020 National Association of Estate Planners & Councils. See Privacy Policy and Terms of Use.”
<b>Special Projects</b>	Post information about special events such as an Estate Planning Day, golf outing, or charitable event.
<b>Sponsor Sales</b>	This page is accessed by a link on the Sponsor page. Use it to inform potential supporters of available sponsorship opportunities. NAEPC recommends listing your sponsorship levels and benefits as well as the appropriate contact information.





## Contact Us

Use this page to change the contact information for your council and to specify different email addresses for event RSVP messages, membership form submissions, and general council contact.

These fields are text fields, allowing you to enter up to 255 characters of text.

### Best Practices for the Fields in Contact Us

<b>Council Name</b>	The name of your local council.
<b>Contact Name</b>	The council Administrator/ Executive's information should appear here. If your council does not have a paid administrator this should be the name of someone on the Board who will act as the representative of the Council. Consider the President or the PR Chair.
<b>Firm Name of Contact</b>	We recommend using the name of your Council.
<b>General Email Address</b>	Type in the email address of the designated individual listed in the <i>Contact Name</i> field. <ul style="list-style-type: none"> <li>• This address will receive emails when anyone wishes to contact your council.</li> <li>• This address will appear in all recipients' "From" box when broadcast emails are sent out. This address is also the default recipient for all event RSVPs and membership renewal notifications, unless overridden by the following two options.</li> </ul>
<b>Event RSVP Email Address</b>	If you wish to have a different recipient than the one listed under General Email Address, type in the email address of the designated individual. This address will also be the only address that receives responses from the interactive application forms and event RSVPs.
<b>Membership Email Address</b>	Consider putting the email address of the Membership Chair of the Board. This address will receive all membership applications filled out online.
<b>Address</b>	Use the physical location where the local council receives mail.
<b>Phone Number</b>	Use a central number for the Council.
<b>Fax Number</b>	Use a central number for the Council.

## Communication & Events

### Communication

# Communication Hub

Send Message

Message History

Groups Setup

Designed to look and feel similar to the email systems you are used to using, the Communication Hub allows you to send email and/or text messages to your Council's mailing list. This feature is dictated by each member's preference on the [Members](#) page (under **Contact Information**.) Your members' set up their contact preferences when they make and/or update their member profile (if the administrator has granted this permission in the Member Profile Self-Administration section, see page 19 for more details.)


### Send Message

When composing a message, the system allows you to choose from **Email** or **Text** and when to send the message, now or in the future.

### Send Message

Send Using:  Email  
 Texting (SMS)

Deliver Message:  Now  
 At a future date & time

Scheduled Delivery Date:   at

To schedule a message to be sent in the future, click the button in front of *At a future date & time*, click on the [Delivery Date](#) box or the calendar next to this box and choose a date, then click on the [Delivery Time](#) box and choose a time from the drop-down menu.

### Recipient Information

When composing a message, the system provides a dropdown list of potential recipients for you to choose from. Most of the recipient lists are generated by the database & website system, including:

- All Active, Past and Prospective Members
- All Active Members Only
- All Past Members Only
- All Prospective Members Only
- All Council Leadership
- Non-Renewed Active Members

- Attendees and Non-Attendees to Events in Your Council’s Calendar
- Active Members by Discipline
- Manually Entered List

### Recipient Information

**Message Information**

To: All Active, Past and Prospective Members

From: SEPC Board  
jon  
NAEPC Web Training Manual  
aaron test  
Test 1  
2015 conference group  
Test 3

Message Type: NAEPC Web Training Manual  
Non-Renewed Active Members

Subject: Event Attendees: Test Event for the NAEPC Web User Manual (2019-12-31)  
Not Attending: Test Event for the NAEPC Web User Manual (2019-12-31)  
Event Attendees: Event Planning Seminar (2018-09-14)

If you have created customized groups of recipients in the **Groups Setup** tab they will also appear in this dropdown list.

**Note:** To learn more about how to create segmented recipient groups, please go to *Predefined Distribution Groups* on page 24.

### Message Information

This section gives you the option of composing a new message or sending out NAEPC News.

Selecting NAEPC News will eliminate the option of using the freeform editor and only let you pick one of the generated newsletters supplied by NAEPC (automatically added from the national office).

### Message Information

Message Type:  I want to compose a new message  
 I want to send NAEPC News

Subject:

Newsletter: NAEPC News, August 2018 [View Newsletter](#)

**Subject** When composing a message, be as descriptive as possible but try to avoid words that may cause the message to be filtered into a junk or spam folder.

**File Attachments** You can attach up to 3 attachments (.pdf, .jpeg, .gif files).

**Message (Freeform Text Edit)**

- For more instructions on how to use the freeform text editor when composing your message, go to **Using the Freeform Text Editor on Your Council Page** on page 62 of this guide.
- Please be advised that not all browsers support formatting for copying and pasting an existing document into the CK editor.

**Signature (Check Box)** The signature is generated from member information of the Admin User you are currently logged in as.

**Email Header (Check Box)** This is a Yes/No option. The email header will include your council's name and logo if you check this box.

**Add Event Details (Drop Down Menu)**

- You can add details from events you have created using the website.
- For more information on how to create events, go to the **Events** section on page 27 of this guide.
- Any information you have entered for that event on the Events page will be populated and formatted into your email message.

**RSVP Button in Messages - Level 3+ Special Feature**  
 If you have a Level 3+ website, a message can include a 'register now' hyperlink to a specific event from the online registration area of your site.

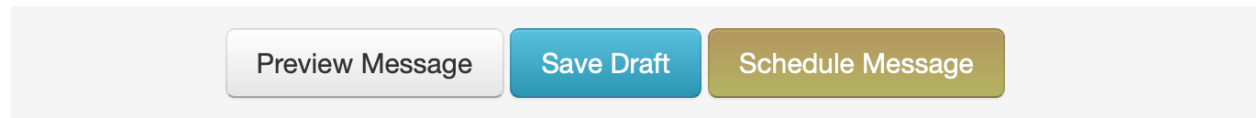
**Below-Event Message** You may enter an additional message, if necessary, which will appear below event details. You have the same editing options as in the body of the main message text.

Click the **Preview Message** button and a pop-up box will appear displaying the message your council members will receive.

A draft of your message can be saved and sent at a later date. By selecting **Save Draft**, your draft is saved in the **Message History** tab in the Communication Hub. When you are ready to send your message, go to the **Message History** tab, click on the magnifying glass in the details column of the message you want to send, click **Replay Message** and then scroll to the bottom of the page and click the **Send Message** button.

To send your message immediately, click the [Send Message](#) button at the bottom of the page.

If you have chosen to send your message at a later date, and chose the date/time to send, you will click on [Schedule Message](#):



### Message History

This area of the Communication Hub works like the Outbox on a traditional mail client. It includes the following items and you can sort by any of the headings (except Details):

#### History of All Messages

Show  entries Search:

	Created	Subject	Group	Recipients	Status
<input type="button" value="Q"/>	2020-10-14 10:09pm	Test 2 with attach	Test 3	2	<span style="background-color: #4a86e8; color: white; padding: 2px;">Draft</span>
<input type="button" value="Q"/>	2020-09-25 10:41am	Test 2 with attach	Test 3	2	<span style="background-color: #2e7d32; color: white; padding: 2px;">Success</span>

- **Details** –  clicking on the magnifying glass drops down a sub-menu allowing you to either preview or send the message again, and/or see any errors that occurred during deployment.
- **Created** – shows the date and time the message was sent.
- **Subject** – shows the subject line of your message.
- **Group** – letting you know what recipient group it was deployed to.
- **Recipients** – showing how many people were included in the message deployment.
- **Status** – letting you know the following statuses of messages:
  - **Success** – the message was deployed to recipients successfully.
  - **Draft** – the message has not been deployed yet, and is editable.
  - **Error** – there are issues with the deployed message.

Appearing in this list just confirms that the message was sent. It does not confirm that it was delivered to its destination.

**Note:** If you are having an issue with deliverability of council messages, please contact Council Services at [councilservices@naepc.org](mailto:councilservices@naepc.org).

#### Replay Past Messages

You are able to resend a communications message that is very similar to a past message, such as to remind members to RSVP for an event or renew their membership. Any message you send can be "replayed" by finding it in the [Message History](#) tab of the [Communication](#) page.

### History of All Messages

Show  entries Search:

Details	Date	Subject	Group	# Emailed	Status
<input type="button" value="Q"/>	2018-07-30 10:53:30	Test 2 from EPC	active	9	<span style="background-color: green; color: white; padding: 2px;">Success</span>
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> <input type="button" value="Message"/> <input type="button" value="Replay Message"/> </div> <div> <p><b>Status Code:</b> <span style="background-color: green; color: white; border-radius: 50%; padding: 2px;">1</span> <b>Status Message:</b> <span style="background-color: green; color: white; padding: 2px;">Success</span></p> <p><b>Members Emailed:</b>            councilservices@naepc.org            test@test.com            aaron@ginormousindustry.com            Spuhlernaepc@outlook.com            nealjonv@gmail.com            webmaster@naepc.org            bruce.newburger@gmail.com            hiring@dynamicus.com            eleanor@naepc.org</p> </div> </div>					
<input type="button" value="Q"/>	2018-07-27	EPC Test to Active Members	active	6	<span style="background-color: green; color: white; padding: 2px;">Success</span>

- Click the magnifying glass to expand your message to view (click **Message**) or **Replay Message**.
- Upon replay, your **Compose Message** tab will be populated with the same information used the first time the message was sent: recipient group, subject, file attachments, message, and event details.
- You can change any of these before you send the message again.
- Please note that this feature allows you to resend only those messages you previously sent from this date forward.

### Groups Setup

For the NAEPC Communication Hub, we use the catch-all term, **Groups** to refer to email and text list segmentation.

If you've been using email and/or text to reach your Council members, you might have come across the term "segmentation". It's a marketing term that simply means dividing people into groups based on information like demographics, disciplines, or member status.

Sometimes, emails/texts are not one size fits all. One email/text might appeal to some people on your list while others need something completely different.

Council Members or Prospective Members who aren't interested in emails/texts might delete them, or worse, unsubscribe if they find that your messages aren't relevant to them. You can avoid this by segmenting your lists to target the right group with the right, relevant messages.

The system has created predefined mailing lists for you based upon the most common needs of councils to include:

- **All Active Members**
- **All Past Members**
- **All Prospective Members**
- **All Council Leadership**

An all-inclusive list, **All Active, Past and Prospective Members**, means everyone in the database will receive the message.

### *Level 3+ Features - Predefined Distribution Groups*

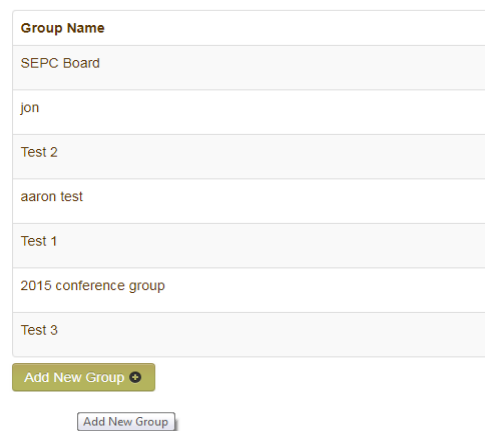
Level 3+ websites have custom lists created that are determined by member transactions on the site.

- The communication area can send messages to Non-Renewed Active Members (last 6 months) based upon the renewals logged on the site.
- Event Attendees and those not yet RSVP'd (Event Attendees or Not Attending, will contain event title) lists are created by the reservations logged from the site.

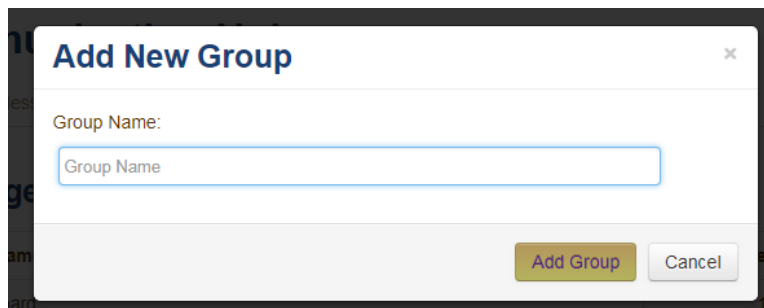
### *Creating a Custom Communication Group*

To set up a specific group (other than the default groups already in the pull-down list found on the **Send Message** tab) to receive an email/text, you will want to utilize this option. You may also wish to use this option for communicating only with attendees for a certain event, communicating with members of a committee, etc.

#### **Manage Communication Groups**

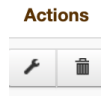


- Click the **Add New Group** button, which will open a dialog box.
- Type the name of the group in the text box, and click **Add Group**.



You can add new members to a Communication group by name, member status or discipline.

- Click the wrench icon under **Actions** to edit the group name and add members to the group.



- **By name:** If you have a few members to add to the group list, this function will be best. You may add members by entering their last name in the **Search** box, clicking the box next to the correct member and clicking **Add Selected Members** at the bottom of the page. Choose additional members by repeating the steps above.
- **By Member Status:** If you choose to search by member status, click the **Member** dropdown box attached to the **Filter by** prompt, review the list and click the appropriate listing.

### Add Members To Group

Filter by All Members All Disciplines

Show All Members  
All Active Members  
All Past Members  
All Prospective Members

Select	First Name	Last Name	Company
<input type="checkbox"/>			

- **By discipline:** If you choose to search by discipline, click the **Discipline** dropdown box attached to the **Filter by** prompt, review the list and click the appropriate listing.

### Add Members To Group

Filter by All Members All Disciplines

Show 100 entries

Select	First Name	Last Name	Company
<input type="checkbox"/>	Julia	Zettl	
<input type="checkbox"/>	Nancy	Test	NAEPC



- You can select multiple members from filtered and sorted results by clicking the checkboxes next to their names.

### Add Members To Group

Filter by

Show  entries Search:

Select <input type="checkbox"/>	First Name	Last Name	Company	Email	Phone
<input checked="" type="checkbox"/>	Julia	Zettl	MJM Services	-	✓
<input checked="" type="checkbox"/>	Nancy	Test	NAEPC	-	✓
<input checked="" type="checkbox"/>	Nancy	Test	NAEPC	-	✓
<input type="checkbox"/>	Eleanor	Spuhler		-	✓
<input checked="" type="checkbox"/>	NAEPC Board	of Directors		-	✓
<input type="checkbox"/>	Bruce	Newton-John		-	✓
<input type="checkbox"/>	Bruce	Newhouser	Newhouser and Oldhouser	-	✓
<input type="checkbox"/>	Bruce	Newfoundland		-	✓
<input type="checkbox"/>	Bruce	Newburger9	NAEPC	-	✓
<input type="checkbox"/>	Bruce	Newburger	NAEPC	-	✓
<input type="checkbox"/>	Jon	Neal	JonTech	-	✓
<input type="checkbox"/>	NAEPC	NationalOffice	NAEPC	-	✓
<input type="checkbox"/>	Anthony	Mahramus	ACME Corp.	-	✓
<input type="checkbox"/>	Aaron	Lukacsko		-	✓
<input type="checkbox"/>	Gary	Flotron	NAEPC	-	-
<input type="checkbox"/>	Dave	Cintron	Dynamics Online, Inc.	-	✓
<input type="checkbox"/>	Kathleen	Callahan	CEPC	-	✓
<input type="checkbox"/>	Sarah	Butterfield	NAEPC	-	✓



Showing 1 to 18 of 18 entries Add Selected Members ◀ Previous Next ▶

- Click **Add Selected Members** when you are finished creating your group.

### Deleting a Custom Communication Group

You can delete a Communication group but you cannot choose to delete individual members. This action will delete the entire group.

- Click the garbage can icon under **Actions** to delete the group.
- A pop-up box will appear asking you if you want to proceed. This action is irreversible.

Group Name	# of Members	Actions
NAEPC Web Training Manual	1	 

## Events

Use the **Events Calendar** tab on the Events page to view past and upcoming events, add future council events to your website, and to view RSVPs received. Only future events will appear on the public calendar.

[home](#) / [events](#)

**Events**

Events Calendar    Event and Payment Settings

**New Event**

Show  entries    Search:

Date	Event	Actions
09/14/2018	Event Planning Seminar	
04/25/2018	Test Event for Microsoft Calendar	

Past events will automatically be removed from the public-facing site once the date has passed, but not from the administrative side. To remove events from the administrative side of your website, you have to manually delete them.

Keep in mind that past events can serve as a history for your council and may be useful to keep track of speakers and topics your council has recently covered.

The Events Calendar can be restricted to members only, meaning it can only be viewed by logged-in members of your Council.

**Note:** To learn how to restrict access of Council pages to Members Only, please go to page 10 of this guide.

### Events Calendar

- Click the **Events Calendar** tab at the top of the **Events** page. The list of events will be displayed.
- Click the icon in an event's row to edit the information about the event.
- Click the icon in an event's row to delete the event.

### Creating a New Event

Click the **New Event** button and you will be taken to the **Event Details** tab. This page contains the following fields.

<b>Title</b>	Freeform text field.
<b>Date</b>	This is a calendar date menu you must select. Dates cannot be hand-keyed into the system.
<b>Time</b>	These fields are drop-down menus for the start and ending times. Times cannot be hand-keyed into the system.

**Location** Freeform text field.

**Speaker** Freeform text field.

**Image** Best practice for adding an Image to your event – use the speaker’s headshot.

By clicking the **Select File** button, a menu will open, prompting you to choose the image from your computer.

**Event Information** Type your text in the box.

***Note:** For information about using the full capabilities of the message interface, see the **Using the Freeform Text Editor on Your Council Page** section of this manual on page 62.*

*Adding a Related Document to an Event*

If you have a corresponding document to add to the event, you can attach it on the **Related Documents** section.

Related Documents are demarcated with a check box. You can add as many or as few documents as necessary. To attach a document, simply click the box in front of the document you wish to attach under Related Documents.



This list is pulled from the **Document Library**.

***Note:** For instructions on how to add documents to the Document Library, go to page 58.*

*Adding a Related Link to an Event*

If you wish to direct viewers to an external link (perhaps the speaker’s website), you can add a **Related Link** to your event.

Related Links:

Title: <input type="text" value="Julia's Website"/>	Uri: <input type="text" value="http://www.juliazettl.com"/>		
<input type="text" value="Title"/>	<input type="text" value="Uri"/>	<input type="button" value="Add New Link +"/>	

To attach a link simply type a descriptive title of the link you wish to add in the **Title** field and type or paste the **URL** into the URL field. (Links **must** contain *http://* or *https://* or they will not redirect to the website you’ve attached.)

***Note:** Links **will not** be attached to the event unless you click the **Add New Link** button next to the URL field.*

To add another link, click **Add New Link** to add another row, and repeat the process for this second link.

For technical support, contact the NAEPC office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or 866-226-2224.

### Visibility of Events

You have the option of making your event appear both on the National Calendar and/or a Featured Event.

- Visibility:  Show this event on National Calendar  
 Make this a Featured Event

- Featured Events appear above 'Upcoming Events' on your site template.

Choosing to show your event on the National Calendar will add it to the Council Event Calendar page (<https://www.naepc.org/events/events-calendar>) on the NAEPC website. This calendar serves as a clearing house for all local council events and can be a useful tool when looking for speaker and topic ideas.

Making your event a Featured Event will place it above any of your other events on the Homepage of your website. You might want to check this box to highlight an annual symposium or other special event.

To activate either of these options, click the check mark box next to the desired option.

**Note:** Level 2 websites have no additional options, and Event creation ends here. Click **Save** at the bottom of the page.


### Event RSVP Information - Level 3+ Features

To activate the RSVP Options, toggle the button for **Include Event RSVP?** This will open the RSVP dialog box.

Include Event RSVP?:  Yes

### Event RSVP Information

Participation:  Members Only  
 Open to the Public

Override Event Email:  

## Event RSVP Information

<b>Participation</b> <i>(Radio Buttons)</i>	Choose the appropriate button: <b>members only</b> or <b>open to the public</b> .
<b>Override Event Email</b>	Provide a different email address if you want RSVPs to be mailed somewhere other than the email listed on the Contact Us page.
<b>Payment Methods</b> <i>(Check Boxes)</i>	<p>Select the individual credit card options if you want to receive credit card numbers for use in some other processing method (Level 3) or Plug-n-Pay integrated processing (Level 4). PayPal processing is available through the <b>Credit Card or PayPal</b> option if you have a PayPal merchant account setup (see the <b>Event and Payment Settings</b> information on page 33 for instructions on linking this to your website).</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> American Express</li> <li><input type="checkbox"/> Check to be Mailed</li> <li><input type="checkbox"/> Discover</li> <li><input type="checkbox"/> MasterCard</li> <li><input type="checkbox"/> Pay at the Door</li> <li><input type="checkbox"/> Visa</li> <li><input type="checkbox"/> Pre-Paid</li> <li><input type="checkbox"/> Credit Card or Pay Pal</li> <li><input type="checkbox"/> No Charge</li> <li><input type="checkbox"/> Unable to Attend</li> </ul> <p><u>Level 3 Website Payment Feature:</u></p> <ul style="list-style-type: none"> <li>● Select Credit Card or PayPal option to link the reservation to your PayPal account. This is the only option that will link to PayPal. Once the guest follows the link, all forms of acceptable payment will be listed.</li> <li>● Select card type only if an administrator will be manually processing the charges. The data is stored securely, but no transaction takes place on the website at this level.</li> <li>● Select the individual credit card options above if you want to receive credit card numbers to manually process.</li> </ul> <p><u>Level 4 Website Payment Feature:</u></p> <ul style="list-style-type: none"> <li>● Choose the credit cards that are accepted through your merchant account. Plug-n-Pay automatically processes these transactions.</li> </ul>
<b>Edit &amp; Cancellation Policy</b>	Choose the appropriate radio button: attendees <b>cannot cancel or edit their RSVP</b> , or attendees <b>can cancel/edit their RSVP, with options</b> .
<b>Event Fees</b>	<p>Allows you to define different ticket prices/fees for the event, such as: Member Fee, Guest Fee, etc.</p> <ul style="list-style-type: none"> <li>● Text Boxes allow any named fee to be entered, and the cost.</li> <li>● Each Fee item can be deleted or rearranged using the Arrow or Delete symbols.</li> </ul>

Event Fees:

Luncheon Registration - Member \$30.00

Luncheon Registration - Non-Member \$45.00

**Attendee Addresses**  
*(Radio Buttons)*

Choose the appropriate radio button:

- Do not collect event attendee address information,
- Allow event attendees to enter address information, or
- Require event attendees to enter address information.

**Attendee Questions**

You may define additional freeform questions to ask your event attendees. A response will be collected for each event attendee present on the RSVP. Questions can have different response types:

- Select ONE answer (radio button);
- Select MULTIPLE answers (checkboxes);
- or Freeform Text (text input)

Question:

Question Type:  
 Select ONE answer (radio buttons)  
 Select MULTIPLE answers (checkboxes)  
 Freeform Text (text input)

Available Answers:

## To View RSVPs

- Click the pencil button to the right of the event RSVPs you would like to see.
- Click the **Event RSVPs** tab at the top of the page. Information about each RSVP received will be displayed.

**Event** home / events / even

Events Details | **Event RSVPs**

**Total Event Attendees: 5** + New RSVP | Print All Individually | Print All | Export

Show  entries Search:

Date	RSVP Info	# Attendees	Pay Method	Total	
2/7/18 11:46AM	<ul style="list-style-type: none"> <li>Newburger, Ethan (NAEPC)</li> <li>Fee Type: Guests</li> <li>Event Attendance: <input type="button" value="Show"/></li> <li>Special Requests: Test pay at door.</li> </ul>	1	Pay at the Door	\$5.00	<input type="button" value="Details"/> <input type="button" value="Edit"/>
2/7/18 11:42AM	<ul style="list-style-type: none"> <li>Newburger, Lisa (NAEPC)</li> <li>Fee Type: Pay it</li> <li>Event Attendance: <input type="button" value="Show"/></li> <li>Special Requests: Test 1 with check payment</li> </ul>	1	Check to be Mailed	\$4.00	<input type="button" value="Details"/> <input type="button" value="Edit"/>

- You can manually add RSVPs using the **New RSVP** button.
- You can print or export RSVPs by clicking **Print/Export Event RSVPs**. When you click this button a pop-up box appears with options to print All RSVPs or By RSVP date (choosing this will prompt you to pick a start and end date). You can print all RSVPs in one document (Print), print each RSVP on its own page (Print Individually), or export the RSVPs to an Excel document (Export).
- If you would like to keep track of No-Shows for your events you can toggle the Show button to No-Show in the RSVP Info column.
- Click the Details button and all the information provided by the attendee will appear in a pop-up box. You can edit or print the RSVP from this box.
- Click the Edit button to manually change RSVP information. At the bottom of this page you can save the changes you have made, print the RSVP or cancel the RSVP.

## Event and Payment Settings

- Click the [Event and Payment Settings](#) tab at the top of the [Events Page](#).

### Events

[home](#) / [events](#)

[Events Calendar](#)

[Event and Payment Settings](#)

Visibility:  Anyone can view calendar and next meeting pages

Only members can view calendar and next meeting pages

Logged-in members may view a list of RSVPed event attendees for council events

Plug-n-Pay:  Use Plug-n-Pay to process payment transactions

Your Plug-n-Pay Username is required for all transactions, and your Password is required to process Event RSVP cancellation transactions.

Plug-n-Pay Username:

Plug-n-Pay Password:

Visit your [Plug-n-Pay Administration Panel](#) for manual transaction processing. [Get additional help.](#)

Paypal:  Use Paypal

To find your Merchant ID, log into [PayPal](#) and select the Profile menu. It is the last item under "My Business Info".

Paypal Merchant ID:

- **Visibility:** Decide who can view the calendar and next meeting pages, and click the appropriate circle. If you would like, click the box to allow members to view a list of RSVPed event attendees when they are logged in to your site.
- **Plug-n-Pay:** If you have a Level 4 website, check the box to use Plug-n-Pay to process payment transactions. Enter your username and password for your council's Plug-n-Pay account.
- **PayPal:** If you have a Level 3 website, check the box to use PayPal to process payment transactions. Enter your Merchant ID for your council's PayPal account.
- **Refund Policy:** Enter your council's refund policy in the text box. NAEPC strongly encourages all councils to have a refund policy in place. A sample might be:  

The Council will issue a refund of registration fees for any cancellation request received in writing by noon on the day before the event. Annual membership fees will not be refunded if membership is cancelled before the year is over.
- Click [Save](#) at the bottom of the page.



## Member Management

### Members

Use this page to maintain your Council’s database of members through your website for viewing and downloading. Functions can be restricted to Members Only, and are found on the Settings page under Page Access.

### Using the Web Membership Directory as a Member Database

We recommend keeping the website directory as up-to-date as you would your master membership database. ***This directory is not intended to replace any other system*** you may already have in place to track membership dues, history, etc. You may download the database from the site in Excel or CSV formats (see page 49 of this manual) to compare with your office records.

NAEPC’s technical support team does a one-time data import when you purchase your council’s website subscription. We ask that the following fields (columns) be included in the database:

First name	Discipline 1	State
Middle initial or name	Discipline 2	Zip Code
Last name	Discipline 3	Phone
Suffix (Jr., Sr., III)	Discipline 4	Fax
Email address	Company Name	Cell
Title at Company	Address	Web Address
EPC Officer Title	Address 2	
Designations	City	

Once NAEPC has received your membership database, each member’s information will be uploaded to the Members page with the contact preference set to “email” for those who have an email address.

**Please be advised that it is your Council’s responsibility to maintain its database of members. NAEPC is unable to re-upload data after the initial upload is complete.**

### Locating Members in the Directory


The Members page defaults to show you Active members, but you can view a list of Past and Prospective members by choosing either category from the **Currently Viewing** drop-down box at the bottom of the member list.



You can type the member’s name in the **Search** field at the top right of the **Members** page. As you type, the member list will be narrowed down to match your search.

You can click **Previous** and **Next** to scroll through the pages of the directory.

### Adding New Members & Updating Member Profiles

The **Add New Member** button or the pencil  in the **Actions** column next to the member’s name will open the **Member Information** dialog box.







## Members

[home](#) / [members](#)

**Add New Member** Manage Member Disciplines

Show 10 entries

Search:

First Name	Last Name	Business Name	Is Admin?	Actions
Sarah	Butterfield	NAEPC		 
Aaron	Lukacsko		✓	 
NAEPC	NationalOffice	NAEPC		 

### Making Changes to a Member Profile

## Members

Member Information Member Activity

### Personal Information

Name:    
  (Sr., Jr., II)

Designation:  (CPA, CLU, AEP)

Photo:

### Member Information

User Name: *Member's Email Address*  
 Password:   
 Admin  User

### Member Status

Renewal Status: Member has not renewed during the current renewal period.

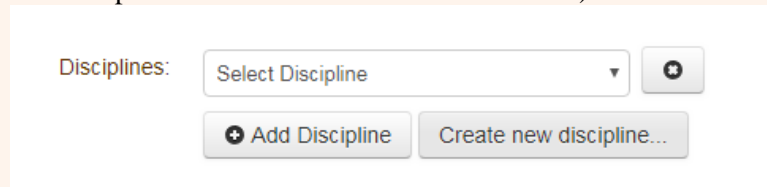
Member Status:

**Personal Information** Including first name, middle name, last name, suffix and designation. You can upload individual member’s photos by clicking **Select Files** next to Photo. Locate the member’s picture on your computer and click **Open/Choose**. The photo will be automatically resized<sup>1</sup> and displayed on the page.

- Member Information**
- You can change the individual’s username and password
  - You can designate the member as an administrator<sup>2</sup>

- Member Status**
- Designate Active, Past or Prospective Members.
  - Only Active Members will appear in your directory.
  - Past and Prospective Members will only receive website-generated correspondence when sent to the **All Members** (default) mailing list.
  - Member Notes will only appear to Administrators, and will not appear in the Member Directory.

- Business Information**
- All information including Business name, title, disciplines, address, city, state, zip and social media address information can be edited.
  - To add a Discipline, click Add Discipline and type in the new discipline. (Any added disciplines are added to the master list of disciplines and available for other members.)



- If you need to delete a discipline that is no longer used or was added incorrectly, use the **Manage Member Disciplines** button on the main **Members** page.

**Services Directory** Checking the box will list the member in the Services Directory, which is an option of Level 3+ websites.

**Note:** See more about the Services Directory on page 50 of this guide.

- Contact Information**
- Members can opt-in displaying their contact information on the Council website (with a check mark in the box).
  - Members can designate which contact method is their preference (with a check mark in the corresponding box).

**Additional Information to Display**  
*Freeform Text Editor* Add any additional information you would like displayed about that member, particularly any specialties, alternate mailing address/office location, etc.

**Note:** This area will not populate into printed directory formatting.

<sup>1</sup>The system can automatically resize photos that are within a reasonable range of the ideal size. Please see sizing instructions in the appendix of this guide on page 68.

<sup>2</sup>The NAEPC recommends limiting the number of members with administrative access for your council’s website. (The fewer individuals making changes to your web pages, the more likely they will remain accurate.)

**License Numbers** Add the specific license numbers for a Member’s licenses.

- Council Leadership**
- Choose the officer titles for the council’s Executive Committee and Board of Directors.
  - Members with Council Leadership Titles applied to their profile will automatically populate your Council’s Leadership page.
  - Edit your list of Leadership Titles on the Settings tab of this admin area.

### Member Information Tab – User Name, Password, & Administrative Access

## Member Information

User Name: *Member's Email Address*

Password:

Admin User

Your NAEPC-hosted website sets each new member's username and password. The username is the member's email address and the default password is the member's “**F**irstname**L**astname” with the appropriate capitalization. The passwords are case sensitive, but the username is not.

If you want to give someone administrative rights to your website simply click the box next to Admin User.

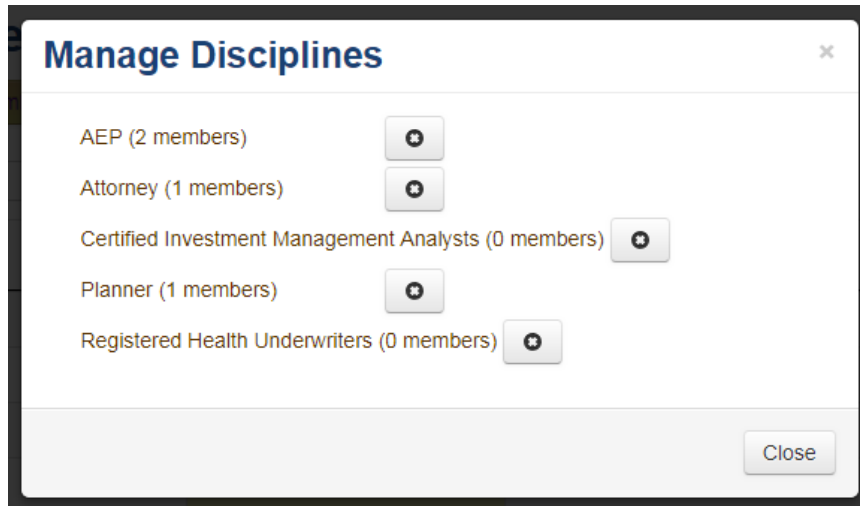
### Managing Member Disciplines

## Members

Add New Member


Manage Member Disciplines

By clicking on [Manage Member Disciplines](#), you can see how many of your members belong to each discipline listed in your database.



From this dialog box, you can remove disciplines from the database. New disciplines can be added to the database on an individual basis through editing a Member Profile. Any new discipline added for a member gets added to the database making it available for all members.

### Deleting Members from the Membership Directory Permanently

In the last column on the far right, simply click the trash can  in the **Actions** column. This member will be taken out of your membership records and off your council website.

## Applications

Use this page to choose which membership application form will be available on your site.

### Application Settings – Setting the Type of Application

There are three options for accepting member applications through your Council website:

#### Application Type

Select the type of Membership Application Form you offer:

- No Application Form
- Interactive Application Form
- Downloadable Forms from Document Library

#### *No Application Form*

Your Council is not currently accepting new member applications, and no application will be listed on your council's website.

### *Interactive Application Form*

Prospective members can use your Council website to complete an application, and the application becomes reviewable through the Admin side of the site.

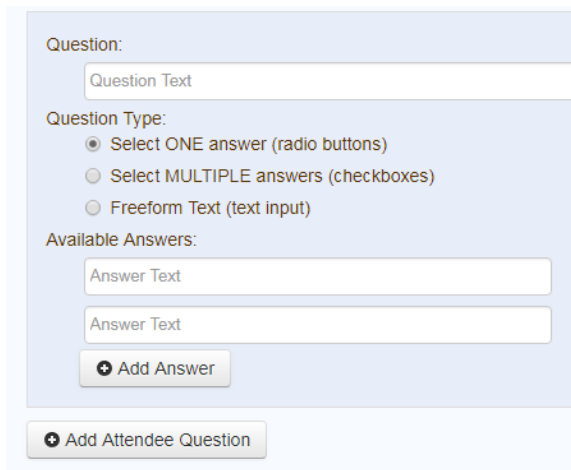
#### **Features of the Interactive Application Form:**

- Applicants become Prospective Members upon application submission, and will get broadcast communications that you send to the default group (All Active, Past and Prospective Members).
- You can accept or reject applications.
- Accepted applicants get email invites to complete a membership form, select a password, and pay.  
*(Level 3+ websites only): Application payment options are administered on the Member Renewal page.*
- New member applications will continue to be emailed to your council's membership contact. All details of the applications are viewable in this admin area, using the **View Applications** tab of the **Membership Applications** page.

You may define additional freeform questions to ask prospective members. A response will be collected for each prospective member on the **View Applications** page.

Questions can have one of three different response types:

- Select ONE answer (radio button);
- Select MULTIPLE answers (checkboxes);
- or Freeform Text (text box)



Question:

Question Type:  
 Select ONE answer (radio buttons)  
 Select MULTIPLE answers (checkboxes)  
 Freeform Text (text input)

Available Answers:

### *Downloadable Forms from Document Library*

(council uploads their own application form)

- Prospective members can download an application from the Council Document Library, complete it and return it to the Council manually.
- A listing of all the documents you have uploaded to the Document Library appears below the option when checked.
- Choose the membership application you posted.
- If you did not post any documents in the **Document Library** it will say: “There are currently no documents in your library.” You will need to choose one of the first two options or upload your application into the **Document Library**.

***Note:** To learn how to add documents to your library, go to page 58 of this guide.*

### **Viewing Submitted Applications**

- Click the **View Applications** tab at the top of the Member Applications page. The list of applications is displayed by date (most recent)
- Click **Application Details** to view each application. There are **Accept** and **Reject** buttons to facilitate the process of adding the application to your active member list, or removing the application from the site.
  - By selecting **Approve**, the applicant will be sent an email asking them to come back to the site to complete their application/payment.
  - When the applicant clicks on the link in that email, they will see a screen that combines features of the Member Profile Update and Member Renewal forms. The applicant can modify their information, select a password, and make a payment using all of the same options you have set for member renewal.
  - Upon completion of the payment, both the member and admin get a confirmation email and the member record moves from Prospective to Active.

### **Renewals**

Use this page to establish the data fields for membership renewal online.

***Note:** Unlike other pages and settings on your Council’s administration pages, changes made to the Membership Renewals section are saved immediately.*

## **Membership Renewals**

Renewal Settings

View Renewals

### **Process Membership Renewals Online**

On the Renewal Settings tab of the Membership Renewals page, go to the **Process Membership Renewals Online** prompt. This option will be active for your Council’s page if a check mark appears in the box, and will allow members to renew their membership online.

For technical support, contact the NAEPC office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or 866-226-2224.

## Process Membership Renewals Online

Online Membership Renewal is Active

If you do not check this box, individuals visiting your website will not be made aware that this feature exists.

### Membership Renewal Period

#### Membership Renewal Period

Current Period Name: **2020 NAEPC Dues Renewal**

Members may renew starting on **April 17th** of each year.

The current renewal period started on **April 17th, 2020** and ends on **April 16th, 2021**.

Edit

Match your membership renewal cycle to your fiscal cycle. Clicking the **Edit** button opens the following dialog box where you can adjust your membership renewal period.

#### Set Renewal Period Information ×

Renewal periods are one year in length beginning on the calendar day and month you specify (the year is adjusted to current year).

Period Name:

Start Date\*:

Cancel

Submit

### Member Application and Renewal Options











This area allows you to set different membership levels and pricing for your Council.

#### *Adding a New Membership Renewal Option/Fee*

- Click the **Add New Option** button at the bottom of the **Membership Application and Renewal Options** Section.

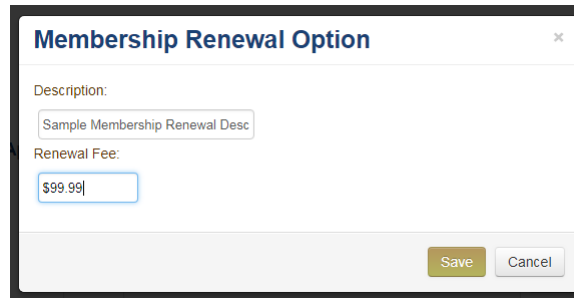


**Member Application & Renewal Options**

Fee	Description	Action
\$23.00	aarp special price	 
\$25.00	Associate Member	 
\$10.00	Early Bird Membership	 
\$10.00	Late Membership fee	 
\$1.00	test	 

[Add New Option](#)



- Complete the details (a description and the cost) for the membership option/fee in the **Membership Renewal Option Dialog Box**.



- Click **Save** to accept the Membership Renewal Option, or **Cancel** to exit the dialog box.

*Editing a Member Renewal Option/Fee*

At any time, you can make changes to or remove the current menu of Member Application & Renewal Options.

- Click the  icon in a Member Application & Renewal Option row to **edit** the information about the Application & Renewal Option.
- Click the  icon in a Member Application & Renewal Option row to **delete** the information about the Application & Renewal Option.

**Payment Methods**

The following payment options are available to your Council when renewing members. You can place a checkmark in any or all of the boxes for which your Council will accept payment.

- American Express
- Check to be Mailed
- Discover
- MasterCard
- Pay at the Door

- Visa
- Pre-paid
- Credit Card (to activate a Plug-n-Pay merchant account) or PayPal
- No Charge
- Unable to Attend

**Note:** The Credit Card or PayPal option is for use only if you are using integration with your PayPal account.

Select the individual credit card options above if you want to receive individual credit card numbers for manual processing (*Level 3+ Website feature*) or Plug-n-Pay integrated processing (*Level 4 website feature*).















### Optional Membership Add-On Fees


Membership Add-On Fees are an optional feature. You may add categories, such as payment for a membership directory or payment for the year’s events.

#### Adding a New Optional Membership Add-On Fee

- Click the **Add New Fee** button at the bottom of the **Optional Membership Add-On Fees**.

Optional Membership Add-On Fees

Cost	Type	Action
\$1.50	Option 1	 
\$2.00	Option 2	 
\$3.00	Option 3	 
\$4.00	Option 4	 
\$5.00	Option 5	 
\$6.00	Option 6	 
\$100.00	Meal Package	 



- Complete the details (a description and the cost) for the membership option/fee in the **Membership Add-On Fee Dialog Box**.

### Membership Add-On Fee ×

Type:

Optional Renewal Add-On Fee

Cost:

\$33.99



Save

Cancel

- Click **Save** to accept the Membership Add-On Fee, or **Cancel** to exit the dialog box.

#### *Editing an Optional Membership Add-On Fee*

At any time, you can make changes to or remove the current menu of Optional Membership Add-On Fees.

- Click the  icon in an Optional Membership Add-On Fees row to **edit** the information about the Add-On Fee.
- Click the  icon in an Optional Membership Add-On Fees row to **delete** the information about the Add-On Fee.

#### **Member Renewal Instructions**

You may add a custom message to your renewal form that contains instructions to the renewing member. This message appears at the top of the form.

#### *Editing your Membership Renewal Instructions*

- Click the **Edit This Message** button at the bottom of the **Member Renewal Instructions** section.

#### Member Renewal Instructions

You may add a custom message to your renewal form that contains instructions to the renewing member. This message appears at the top of the form. Your current message is:

Attention Members: Renewals must be completed by September 30 to be included in the printed booklet of members.

Edit This Message

- Compose your Member Renewal Message in the **Edit Member Renewal Message** dialog box.

**Edit Member Renewal Message** ✕

Attention Members: Renewals must be completed by September 30 to be included in the printed booklet of members.

Cancel
Submit

- Click **Submit** to accept the Member Renewal Message, or **Cancel** to exit the dialog box.

## Payment Provider Settings

### Payment Provider Settings

The **Plug-N-Pay** and **PayPal** settings are set within the [Events administration](#)

## View Renewals

Under the **View Renewals** tab you can view membership renewal information submitted by your members.

[home](#) / [membership renewals](#)


Renewal Settings
View Renewals

Renew Member
View Non-Renewed Active Members
Print / Export Renewals

Show  entries
Search:

Date	Renewal Information	Payment Method	Details
2020-10-16 18:47:40	• <b>Bruce Newburger</b>	Check to be Mailed	

<b>Date</b> <i>Column Header</i>	Provides a timestamp of the record of renewal for the particular Member.
<b>Renewal Information</b> <i>Column Header</i>	Indicates the name of the Member, indicates if the person may be a non-member.
<b>Payment Method</b> <i>Column Header</i>	Indicates the method of payment for a particular Member's renewal. If payment for the renewal is outstanding, it will be indicated in red in this column. (Use the  button to reconcile the account.)

<b>Details</b> <i>Column Header</i>	Click on the  icon under “Details” to open a window showing a summary of all the renewal information about that particular member. Click <b>Print</b> to print, or <b>Close</b> to close the window.
<b>Previous / Next</b> <i>Buttons</i>	Allows you to scroll through the entire list of records of your Council’s membership renewals.

### *Manually Renewing a Member*

The website administrator can manually renew expired members. To do so, click the **Renew Member** button at the top of the page.

The **New Membership Renewal** entry page will open. You will need to complete the following information:

<b>Council Member</b> <i>(drop down box)</i>	Lists active members of your Council eligible for renewal.
<b>Membership Option</b> <i>(radio buttons)</i>	Select the correct membership option for the renewing member.
<b>Membership Add-Ons</b> <i>(check boxes)</i>	Select any and all of the add-on options that apply to the renewing member.
<b>Total</b>	Automatically tabulated based on your selections.
<b>Payment Method</b>	A drop down box with all of the payment options your Council has selected (from the <b>Membership Renewals</b> options page).
<b>Email Confirmation</b> <i>(check box)</i>	Gives your Council the option of automatically generating an email to the renewing member (at the email address listed in their member profile).

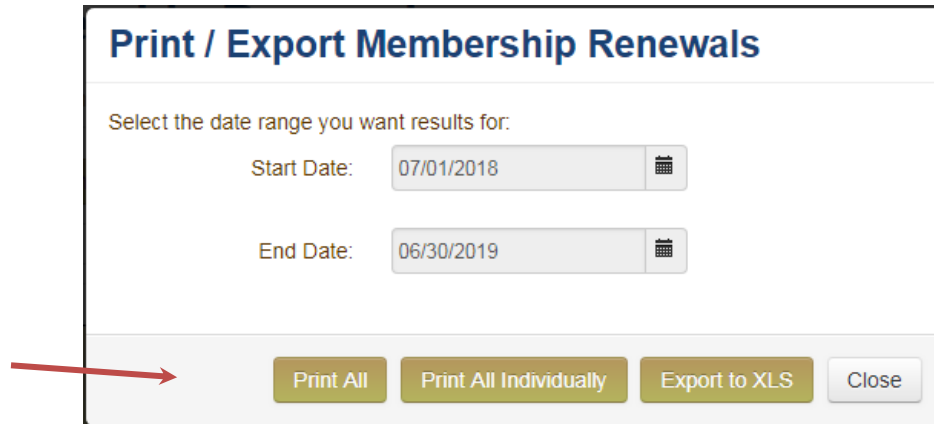
When finished entering the data for the renewing member, click the **Save Renewal** button.

### *View Non-Renewed Active Members*

Clicking on the **View Non-Renewed Active Members** button will open a dialog box and show a list of those members having an active status but no recorded renewal in the renewal period [Current Renewal Period]. The information in this dialog box can be printed, or exported to Microsoft Excel.

### *Print / Export Renewals*

Clicking on the **Print / Export Renewals** button will open the **Print / Export Membership Renewals** dialog box.



- Select the **Start Date** and the **End Date** for the data which you'd like to export or print.
- Select one of the following options:
  - **Print All** – records open in a new browser window for printing
  - **Print All Individually** – records open in a new browser window, and each record is printed on its own page
  - **Export to XLS** – data can be exported to Microsoft Excel
- When finished, click the **Close** button on the **Print / Export Membership Renewals** dialog box.

### Benefits - Level 3+ Website Feature

Use this page to add any local member benefits you may offer your council members. If you do not have any member benefits being offered, you may use the member benefits that populate from the National website.

## Member Benefits

[home](#) / [member benefits](#)

Show  entries

Search:

Added	Benefit	Visible	
06/21/2019	<b>Test</b> Test test test test.	Yes	<input type="button" value="edit"/> <input type="button" value="delete"/>

### Adding a New Member Benefit

To add/edit a new Member Benefit, click on the **+ New Benefit** button, which will open the **Add/Edit Benefit** dialog box.

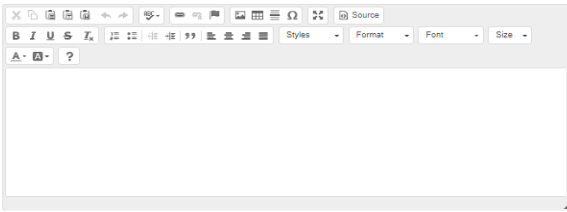
[+ New Benefit](#)

**Add/Edit Benefit**

Title

Title Link

Image

Text 

Categories  Software  
 Educational Opportunities  
 Subscriptions and Publications  
 Discipline-Specific Information  
 Marketing and Website Design Services  
 Presentation Materials and Office Supplies  
 Programs and Services for Council Development  
 Other Benefits, Programs & Services  
 Complimentary Resources  
 NAEPC-Provided Benefits

Visible  Visible  Hidden

Featured  Yes  No Featured listings appear before non-featured listings.

**Title** the name of the benefit you are offering

**Title Link** link to the website of your member benefit company

**Image** Best Practice: use the logo for the company whose benefit you are offering.

- Next to “Image” click **Select Files**.
- Choose the appropriate logo from your computer files and click **Open/Choose**. The logo will appear on the page.

**Text** Text you would like to use to describe and/or use to market the member benefit.  
*(Freeform Text Editor)*

**Note:** For information about using the full capabilities of the message interface, see the Page Editor section on page 16 of this manual.

**Categories** Select the appropriate categories pertaining to member benefit.  
*(Checkboxes)*

**Visibility** Determine whether members can see this benefit in the listing of all the benefits your Council provides.  
*Visible vs. Hidden*

**Featured** Selecting this option will cause **Featured** benefits to appear before non-featured listings.  
*Yes vs. No*

Click the **Save** button to save the newly added benefit.

## Data Export

Use this Function to download a copy of your current member database. This action will not delete the database from the website. You are going to download (pack) the member listing into one of the following:

### Excel

- Click **Download XLSX**.
- Choose to open with Microsoft Excel and click **OK**.
- This will download into a XLS (Microsoft Excel 2007 or later) file. (Packing the member listing may take a while – please be patient.)
- The Excel spreadsheet will appear on your screen.
- In the columns listed, displayphonenumber, displayfaxnumber, displayemailaddress, the “1” means yes and the “0” means no.
- Save this spreadsheet to your computer.

### CSV

CSV is a text formatted file that stands for comma separated values. Think of it as a very unformatted Excel file. It can be useful for importing into some other software that allows CSV import but not Excel.

- Click **Download CSV**.
- Choose to open with Microsoft Excel and click **OK**.



## Sponsors & Services

### Services Directory - Level 3+ Website Feature

## Services Directory

[home](#) / [services directory](#)

The Estate Planning Services Directory is a feature for Level 3+ councils that allows you to publish a directory of service providers for all website visitors to see. This gives you the option to keep your member directory private for members only, while including only those members who want to be listed in the public directory. It also allows you to add listings for affiliate providers or companies that are not traditionally members of an estate planning council.

The Services Directory gives you the option to define service categories and designate some entries as Featured Entries within those categories by editing the member or affiliate entries. You can add non-member listings here, or use the usual Members tab to designate a member to be visible in the Services Directory. You can also place Sponsor banner ads on the main directory page (see [Sponsors](#) for that option). Consider this feature as a great opportunity to generate additional revenue for your council.

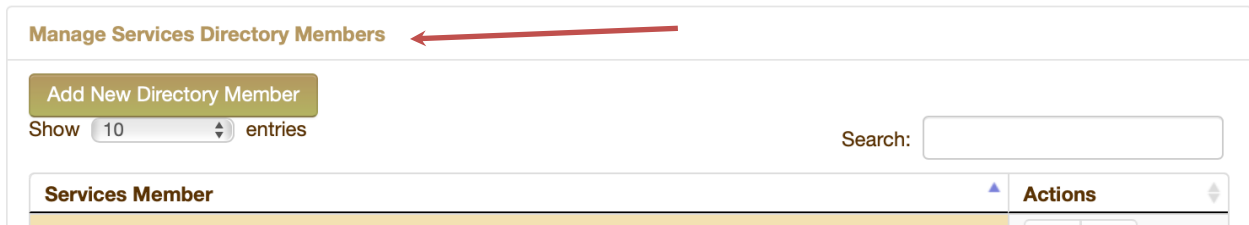
[Manage Services Directory Members](#)

[Manage Services Directory Options](#)

[Manage Services Directory Categories](#)

### Manage Services Directory Members

Click on [Manage Services Directory Members](#) to unroll the menu.



**Manage Services Directory Members** ←

[Add New Directory Member](#)

Show  entries

Search:

Services Member	Actions

Click [Add New Directory Member](#); this will open the **New Services Directory Member** entry page. On this page, the following information can be entered:

#### Personal Information

**Name** Enter first name and last name

- Photo**
- To include a photo, click [Select Files](#).
  - Navigate to where the photo is stored in your computer and click [Open/Choose](#).
  - When the photo loads, a window will open offering the option to crop the photo.
  - Drag the corners of the crop-box until satisfied, then click [Crop](#). If no cropping is needed, click [No Changes](#).

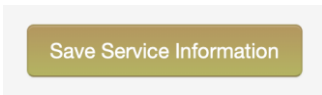
#### Business Information

**Business Name** Enter the business name

**Title** Enter the individual's title

<b>Services Directory Category</b>	<ul style="list-style-type: none"> <li>To associate the listing with a category, click <a href="#">Add Category</a> and choose an existing category from the drop-down menu.</li> <li>Or click <a href="#">Create New Category</a>, type a category name in the field, and click <a href="#">Save Category</a>.</li> <li>You can choose whether to make the Services Directory visible to visitors to your site. Either check or leave unchecked the box next to <b>Display the Services Directory?</b> on the Settings page under <b>Page Access</b>.</li> </ul>
<b>Business Address</b>	Enter the business address
<b>Contact Information</b>	Enter the contract information
<b>Featured Listing (Check Box)</b>	Click the box if you want this new entry to be a featured listing

Click [Save Service Information](#).



### Manage Services Directory Options

Click on [Manage Services Directory Options](#) to unroll the menu.

**Manage Services Directory Options**

---

Intro Text:

Appropriate Use Policy:

[Update](#)

In the **Intro Text** field, type a message for visitors to the Services Directory page to read. In the **Appropriate Use Policy** field, type the council’s warning text in regards to inappropriate use of member contact information. Click [Update](#) to save changes.

### Manage Services Directory Categories

Click on [Manage Services Directory Categories](#) to unroll the menu.

**Manage Services Directory Categories**

---

Services Directory Categories:

Select Category ▼

\* Delete Category

Create new category

Here you can choose the category from a drop-down list of existing categories, or you can create a new category.

### Sponsors & Sponsorships

The **Sponsors** tab shows existing and past sponsors, and allows you to edit, delete and add new sponsors.

The **Settings** tab allows you to set Sponsor Levels as well as choose how to display homepage sponsors.

### Sponsors

Caption	Type	Url	Views /Clicks	Create Date	Actions
Test banner 6	Top of Page Sponsor	http://www.naepc.org	13405/323	04/05/2019	

There are four (4) types of Sponsors for your Council, and each appears different on your website:

- **Sponsor** – appears on the Sponsor page of your Council website
- **Homepage Sponsor** – appears on the Homepage of your Council website
- **Top of Page Sponsor** – appears on the top of each website page; if you have more than one, the sponsor banners will rotate
- **Services Directory** – appears in the Services Directory of your Council webpage.

***Note:** For more information on the Services Directory, see page 50 of this guide.*

Sponsor images will appear in the file size you upload, so be sure to size them properly before uploading them. You may want to request all your banners in the same size. Sponsor image files must be GIF, PNG, or JPEG.

**Sponsor Image Files Recommended Sizing**  
*(in pixels)*

**Sponsor Page** 468 x 60

**Homepage** 120 x 60  
**Top of Page** 468 x 60  
**Services Directory** 468 x 60

*For help in resizing images, see page of this manual.*

*Add a New Sponsor*

If you have not posted any sponsors to this page, the first thing you will see is the **New Sponsor** button. If you have already posted sponsors to this page, the button appears above the listing of patrons. Click **New Sponsor**.

**Add/Edit Sponsor**

Type

Link URL

Caption

Image

Set a sponsor to 'active' for it to be used on your council site. An inactive sponsor is considered turned 'off'. You can specify a start and / or end date for a given sponsor. The sponsor will be used on dates between the start and end dates. A start date with a blank end date means to use the sponsor starting on that start date indefinitely. An end date with a blank start date means to use the sponsor until that end date. If both the start and the end date are blank, the sponsor is controlled exclusively through the active checkbox.

Sponsor Status:  This sponsor is active

Start Date:

End Date:

Sponsor Level

**Type** (Level 3+ Websites Only) When you click on the **Type** box, there is a drop down list in which you can choose one of the following:

- Sponsor (suggested size - 468 pixels wide x 60 pixels high)
- Homepage Sponsor (suggested size - 120 pixels wide x 60 pixels high)
- Top of Page Sponsor (suggested size - 468 pixels wide x 60 pixels high)
- Services Directory (suggested size - 468 pixels wide x 60 pixels high)

**Link URL** *Note:* For help capturing a URL from a website, please go to the *How to*

*Copy and Paste a URL section of the appendix on page 69 of this manual.*



**Caption** Type in the text you would like posted along with the patron’s logo, if any.

- Image**
- Next to Image, click **Select Files**.
  - Choose the logo or banner image from your computer files and click **Open/Choose**.

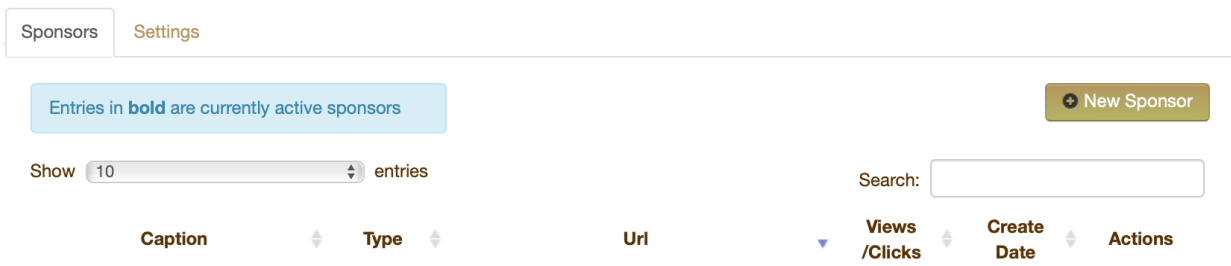
**Sponsor Status** Click the box to make the sponsor active.  
 Set a sponsor to 'active' for it to be used on your council site. An inactive sponsor is considered turned 'off'. You can specify a start and / or end date for a given sponsor. The sponsor will be used on dates between the start and end dates. A start date with a blank end date means to use the sponsor starting on that start date indefinitely. An end date with a blank start date means to use the sponsor until that end date. If both the start and the end date are blank, the sponsor is controlled exclusively through the active checkbox.

**Start Date** Click on the calendar to choose a start date.

**End Date** Click on the calendar to choose an end date.

- Sponsor Level** Here you will find a drop-down menu from which to choose the desired Sponsor Level, or Not Categorized.
- Click **Save**.
  - Click the  icon in the Actions column to edit the information about a Sponsor.
  - Click the  icon in the Actions column to delete a Sponsor.

Once you have posted your sponsors to your website, you will be able to see how many visitors clicked on that sponsor to check out their website. You will find this information in the column called **Views/Clicks** on the **Settings** tab of the **Sponsors & Sponsorships** page.



Sponsors Settings

Entries in **bold** are currently active sponsors + New Sponsor

Show  entries Search:

Caption	Type	Url	Views /Clicks	Create Date	Actions
---------	------	-----	---------------	-------------	---------

## Sponsor Settings

### Sponsor Levels

You may wish to name the Sponsor Levels (for example, *Platinum, Gold, Luncheon Sponsor, Signature Event Sponsor*).

- Click the **Settings** tab at the top of the Sponsor & Sponsorships page.
- Type a descriptive title in the field next to each Sponsor Level.

For technical support, contact the NAEPC office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or 866-226-2224.

- Click **Update**.

Sponsors **Settings**

### Sponsor Levels

Sponsor Level 1

Sponsor Level 2

### Homepage Sponsors Location

Your Council’s Homepage Sponsors can be displayed in one of two places on the Homepage:

- **Vertically** – to the right of Homepage content, or
- **Horizontally** – above Homepage content.

Select the corresponding radio button for your preferred placement of Homepage Sponsors.

### Homepage Sponsors Location

Homepage sponsors are displayed:

- vertically, to the right of homepage content
- horizontally, above homepage content

## Reports

### Revenue Report

#### Council Revenue Report

##### Create New Report

Start Date:

End Date:

- Included Transactions:
- Event RSVPs
  - Membership Renewals
  - Membership Applications

To run a revenue report, enter the start date, end date, click on the types of transactions you'd like included in the report, and click the [Create Report](#) button. You may print this report if desired.

### Site Traffic (Level 3+ Website Feature)

This page features charts which show *highlights only* of visits to and activity on your website. A much more detailed traffic report is available by securing a Google account and logging into Google Analytics. You can create a Google account by clicking [Create a Google account](#), and you can click [send it to us](#) to provide your account email address to the NAEPC office and to gain access to your full traffic report.

## Council Traffic Report

[home](#) / [traffic](#)

The following charts show highlights of your full traffic report, which is available to you by logging into [Google Analytics](#). To gain access to the full report, please provide us with an email address that is already associated with a Google account. [Create a Google account](#) if needed, and then [send it to us](#). Thanks!



## Links & Library

Use this page to add any number of links to other sites, such as related associations or governmental resources.


### Links

The Links page can be restricted to members only.

**Note:** To learn how to restrict Council pages to behind a Member login, please go to page 10 of this guide.

### Add a New Link to Your Council Page

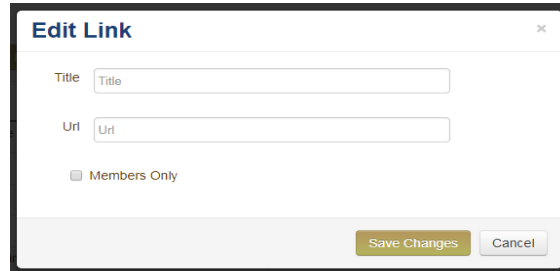
**Links** [home](#) / [links](#)

[Add New Link](#)  Search:

Title	Hyperlink	Members Only?	Actions
Video: Probate Lawyers	<a href="http://www.youtube.com/watch?v=22dGSgcgDHU">http://www.youtube.com/watch?v=22dGSgcgDHU</a>		
NAEPC2	<a href="http://www.naepc.org">http://www.naepc.org</a>		
	<a href="http://www.dynamicus.com">http://www.dynamicus.com</a>		
Cool engine	<a href="http://wolframalpha.com">http://wolframalpha.com</a>		

Click [Add New Link+](#) and a window will pop up.

For technical support, contact the NAEPC office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or 866-226-2224.



The screenshot shows a modal window titled "Edit Link". It contains three input fields: "Title", "Uri", and a checkbox labeled "Members Only". At the bottom right of the modal are two buttons: "Save Changes" and "Cancel".

Type a descriptive title of the link you are going to display on your website. In the URL field, insert the corresponding link to the site you have chosen.

**Note:** For help capturing a URL from a website, please go to the *How to Copy and Paste a URL* section of the appendix on page 69 of this manual.

Check the box if you want the link to be visible to members only. Click **Save Changes**.

## Document Library

Use this page to add documents to your website including membership applications, speaker presentations, newsletters, etc. You are not restricted to a certain type of file - any type of file can be used.

**Note:** If you wish to post your council's membership application on your website, you must upload your application on this page.

The Document Library can be restricted to members only.

**Note:** To learn how to restrict Council pages to require a Member login, please go to page 10 of this guide.

Under the **Library** tab at the top of the Document Library page you will see a list of all the documents you have uploaded to your site and the date they were posted. You can search for a particular document by typing the document's title in the **Search** field. The list of documents will be narrowed as you type.



## Document Library

[home](#) / [document library](#)

Library Library Categories

### Document Library

[+Add New Document](#)

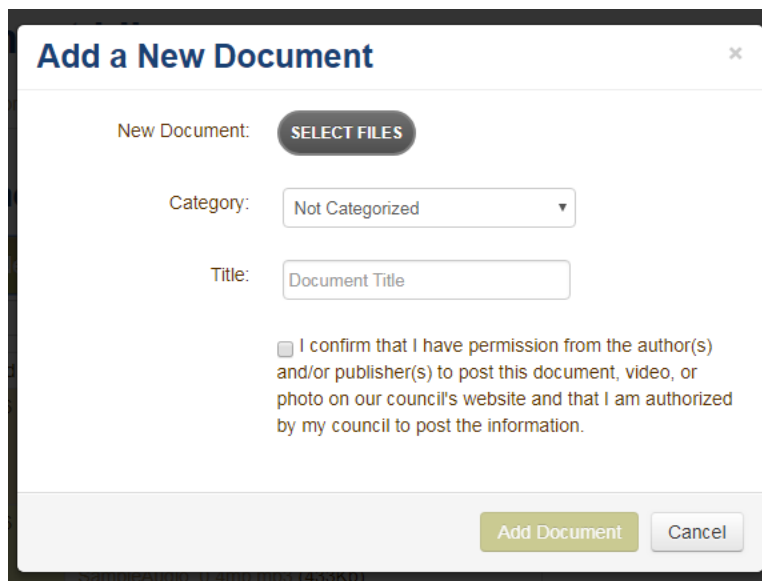
Show 10 entries

Search:

Date Added	Document	Category	Action
2018-07-16 20:17:07	<b>asdf</b> Current Update on Oil and Gas Valuation for Estate and Gift Tax.pdf (3350Kb)	Interesting Documents	
2018-02-26 11:56:22	<b>Sample MP3 file</b>		

### Library - Upload Documents to the Library

- From the Document Library landing page, under the **Library** tab, click [Add New Document](#). A pop-up window will appear.



- Next to **New Document** click [Select Files](#).
- Choose the document you would like to upload from your computer.
- Click [Open/Choose](#).


For technical support, contact the NAEPC office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or 866-226-2224.

- Choose the proper category from the drop-down menu next to **Category**.
- Type in the title of the document in the **Title** field.

***WARNING:*** Please ensure that your council has permission (written permission is recommended) from the authors of any documents posted on your website in order to avoid copyright infringement.

- Click **Add Document**.
- The document will be posted under the **Documents** heading on your council’s website.

### Library - Edit Documents in the Library


- From the Document Library landing page, under the **Library** tab, click the  icon in the **Actions** column to edit the category or the title of a document.
- Click **Save**.

### Edit Document ✕

Category:

Title:

### Library - Delete Documents in the Library

From the Document Library landing page, under the **Library** tab, click the  icon in the **Actions** column to delete a document. Click **OK** to verify.











### Library Categories - Create a Document Library Category

- Click the **Library Categories** tab at the top of the **Document Library** page.

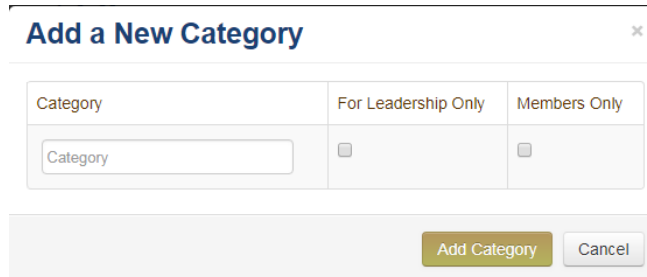
## Document Library home / document library

Library
Library Categories

### Document Library Categories

Category	For Leadership Only	Members Only	Action
Documents for Council Leadership	✓		 
event documents		✓	 
Interesting Documents			 
Library Category 2		✓	 
My New Category			 



- Click [Add New Category](#).



Category	For Leadership Only	Members Only
<input type="text" value="Category"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Type the category name in the field, and check the appropriate box for **Leadership Only** or **Members Only** viewing.
- Click [Add Category](#).

### Library Categories - Edit or Delete a Document Library Category

- Click the [Library Categories](#) tab at the top of the **Document Library** page.
- Click the  icon in the **Actions** column to edit the information about a category. Type directly in the field, and check the appropriate box for **Leadership Only** or **Members Only** viewing.
- Click [Save](#) to apply your changes.
- Click the  icon in the **Actions** column to delete a category. Click [OK](#) to verify.

### Photo Galleries

This page allows you to enter your Flickr ID and create a Photo Gallery on your council's website.


### Photo Gallery Admin

Instructions for setting up your Council's Flickr account and getting your Flickr ID:

1. You must have a Yahoo ID in order to open a Flickr account. If you don't already have one, click [sign up](#) for a Yahoo ID. (Flickr is the photo sharing service of Yahoo that provides the photo hosting and management services we use for this feature.)
2. Go to [www.flickr.com](http://www.flickr.com) and create a new account. Learn how to upload photos in albums (called sets) by clicking [here](#). Be sure to set the permissions for Public NOT Private.
3. While logged into your Flickr account, click [Home](#) and then [Your Photostream](#). Copy out of the web page URL the 12-character account ID. For example, if the URL is <http://www.flickr.com/photos/#####@N###/>, copy the portion indicated here in red by highlighting it with your mouse and typing [Control]+C (Windows) or [Command]+C (Mac).
4. If the above step does not produce an account ID in the necessary format, please use the utility called [idGetter](#).
5. Paste the account ID in the **Flickr ID** field and click [Save](#). A **Photo Gallery** menu will be added to your website.



## View Website

Clicking this tab will take you to your council's website in a new window in your browser. As you work in the administrative pages of your site, you should check periodically to see how the website is being affected. If changes you make do not appear on the website, click the **Refresh** icon  at the top of your browser window while on your council's webpage.

## Help

This page lists contact information for website technical support and for general NAEPC-related questions. You will also find a link to download the NAEPC Website User Guide.

For those councils that have a Level IV website, there is also information on what to do if you have questions about your online payments.

## Logout


Clicking **Logout** on the right side of the top banner will end your session.

## Appendix

### Using the Freeform Text Editor on Your Council Page

The Page Editor is similar to Microsoft Word or other word processing applications. Here is a brief description of each button in the Page Editor menu:

	Cut selection		Bold type
	Copy selection		Italic type
	Paste the cut or copied selection		Strike-through type
	Paste as Plain Text		Remove formatting on type
	Paste from Word		Insert/Remove numbered list
	Undo last action		Insert/Remove bulleted list
	Redo last “Undo”		Decrease indent
	Spell Check as you type (toggle)		Increase indent
	Link selection to a URL		Block quote
	Unlink previously-linked selection		Align left
	Anchor selection		Center
	Insert an image		Align right
	Insert a table		Justify
	Insert horizontal line		Text color
	Insert special character		Background color
	Maximize Editor window (toggle)		About CKEditor

Styles ▾	Formatting styles	Normal ▾	Paragraph format
Font ▾	Font name	Size ▾	Font size
 Source	HTML view (toggle)		

- Many icons will open a dialog box when clicked. Simply follow the on-screen instructions.
- When you are finished typing and formatting your message, click **Save** at the bottom of the page before selecting another page to edit in the drop-down menu.


- Always check to make sure your links are correct after a page has been saved. Click **Visit Website** near the bottom of the menu in the left column, and navigate to the page that contains a link. Click the link, and note whether it links to the proper destination, and whether the target (New Window, etc.) is what you had planned. Make any needed adjustments in the **Page Editor**.

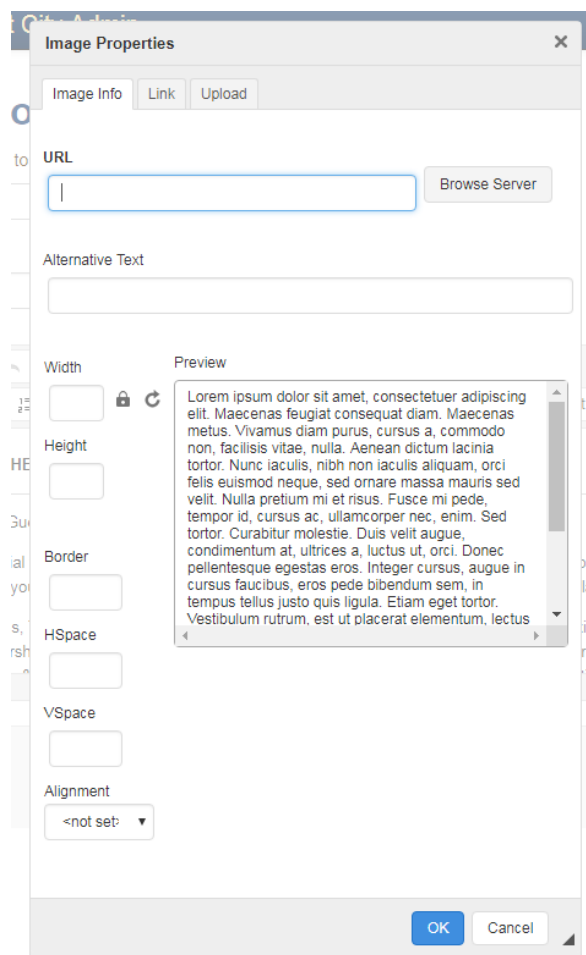
### Hard Returns & Soft Returns in the Freeform Text Editor

Hard returns are used to signify the end of a paragraph, whereas soft returns (sometimes called a “line break” or a “newline character”) simply signify the end of a line.

- To create a **hard return** in the Freeform Text Editor, press [Enter] or [Return].
- To create a **soft return** in the Freeform Text Editor, press [Shift] + [Enter] or [Shift] + [Return].

### Inserting Pictures into the Freeform Text Editor

When inserting a new picture (in GIF or JPEG format), click the  icon. A dialog box with three tabs across the top will appear.



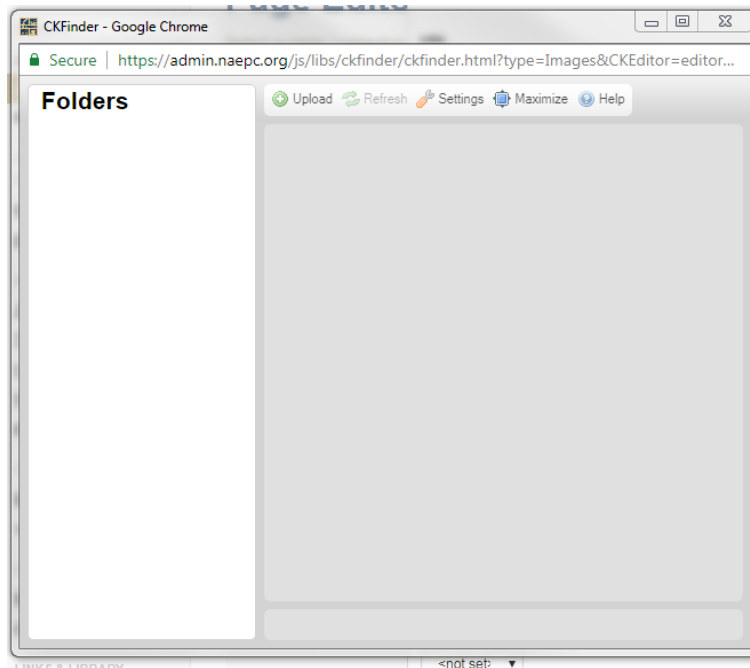
There are two methods to insert an image object into the freeform text editor; uploading the image from your computer to the server, or accessing an image already in the server. Uploading documents and images from the Document Library stores them automatically on the server.

*Uploading Your Image from Your Computer*

- Click the **Upload** tab, then click **Browse** to locate the picture on your computer and click **Open/Choose**.
- Click **Send it to the Server**, and the picture will appear in a sample box with place-holder text (this will automatically move you to the **Image Info** tab of the **Image Properties** dialog box).

*Inserting an Image Already on Your Council’s Webpage Server*

- To insert a picture that has already been uploaded to the server, stay on the **Image Info** tab of the **Image Properties** Dialog box. A dialog box with four tabs across the top will appear.
- Click **Browse Server** to locate the picture, this will open the **CKFinder Dialog Box/Browser** window, which acts like a file drive within your server.



- Double-click the picture you want to insert, and the picture will appear in a sample box with place-holder text.

*Manipulating Your Image Using the Image Info Tab on the Image Properties Dialog Box*

For technical support, contact the NAEPC office at [councilservices@naepc.org](mailto:councilservices@naepc.org) or 866-226-2224.

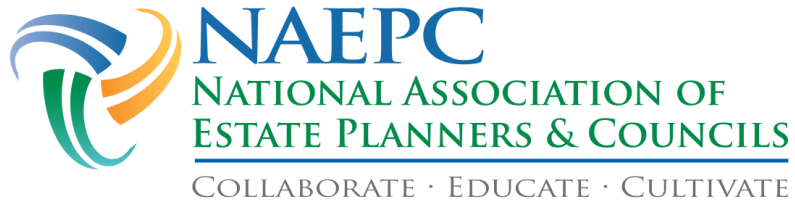
<b>URL</b>	This is the direct link to the image on your Council's website server.
<b>Alternative Text</b>	<ul style="list-style-type: none"> <li>• Alternative text is a word or phrase that can be inserted as an attribute to tell website viewers the nature or contents of an image. The alternative text appears in a blank box that would normally contain the image.</li> <li>• Alternative attributes are used to provide text for visitors who can't see images in their browsers. This includes visitors using browsers that cannot display images or have image display disabled, visually impaired visitors, and visitors who use screen readers.</li> </ul>
<b>Width / Height</b>	<ul style="list-style-type: none"> <li>• If the image you are uploading is <b>not</b> already the width/height you desire, you can manually dictate the size by entering the desired width and height of the image in the fields.</li> </ul>
<b>Border</b>	<ul style="list-style-type: none"> <li>• The measurements you enter in this field are in pixels.</li> <li>• The border attribute is used to add a gray border to an image element.</li> </ul>
<b>HSpace / VSpace</b>	<ul style="list-style-type: none"> <li>• The measurements you enter in this field are in pixels.</li> <li>• Hspace (horizontal space) and Vspace (vertical space) are both attributes for images. It is used to set the space between the element and its surroundings.</li> <li>• The measurements you enter in this field are in pixels.</li> </ul>
<b>Alignment</b> <i>(Drop Down Box)</i>	<p>Select how you'd like the image object to be aligned in the freemform text editor. Options include:</p> <ul style="list-style-type: none"> <li>• Left</li> <li>• Right</li> <li>• &lt;not set&gt;</li> </ul>
<b>Preview</b>	Shows you what the image will look like within the freeform text editor, and ultimately, on the page.

### *Linking an Image to Another Image, an Internal Council Page, or External Website*

In some cases, you may choose to insert a picture that will link to another image, another page on your website, or another website altogether when clicked. You will do this **after you upload or select the image from your Council's servers**, and create the link using the **Link** tab on the **Image Properties** dialog box.

- **Linking to an Image on your Council's Server:** click **Browse Server** and double-click on the linked image.
- **Linking an Image to an Internal Council page, or an external website:** place the URL of the target link into the URL field.
- Choose a target in the Target drop-down menu for the linked image or web page – either a
  - New Window,





- the Topmost Window,
- the Same Window, or
- the Parent Window.
- Click **OK** and you will be returned to the **Page Editor** window.

## Privacy Policy Stock Language

### *Privacy Policy*

At the National Association of Estate Planners & Councils (NAEPC) protecting your privacy and the confidentiality of your personal information is one of our primary concerns. When you use our website, we believe it is important and strive to make sure that any personal information you provide is protected. Please read our statement below for more detailed information.

### *Acceptable Uses of Your Information*

NAEPC may use council membership information to periodically broadcast newsletters, including national conference announcements. This is done only with the written permission of your local council. Each recipient of such a message will have the option to permanently unsubscribe from future communications from NAEPC without changing their relationship with their local council.

### *Our Commitment to You*

The relationship between NAEPC and its Councils and members is extremely important to us. We strive to maintain your trust and confidence in our association, an essential aspect of which is our commitment to protect your personal information to the best of our ability. We believe that you value your privacy, so we will not intentionally disclose your personal information to anyone unless it is required by law, is at your direction, or is permitted by law and necessary to provide you with our services. We have not and will not sell your personal information to anyone.

### *The Personal Information That We Collect and Communicate*

The primary reason that we collect and maintain your personal information is to serve you and administer our relationship with you. The types and categories of information we collect about you include:

- Information we receive from you on applications and other forms to join our membership, or that is provided by your Council to populate its website such as your name, address, telephone number, discipline, and other relevant information; and
- Information about your transactions with us such as conference registrations.

We may disclose the personal information that we collect to companies that perform administrative functions for us such as sending *The AEP® ALERT*, the *NAEPC Journal of Tax & Estate Planning*, and annual statements for At-Large dues and AEP® and EPLS Annual Dues & Recertification forms.

### *How to Contact Us*

Our relationship with you is our most important asset. You entrust us with your personal information, and we do everything we can to maintain that trust. If you have any questions or concerns about our use of your personal information, please e-mail us at [admin@naepc.org](mailto:admin@naepc.org) or call us at (866) 226-2224.

## Image Resizing

<http://webresizer.com/resizer/>

### To Resize a Photo Using Microsoft Picture Manager

1. Save the photo on your computer in a logical place or a folder designated for photos.
2. Return to the photo and open by using a right click and choosing **Open With**. Use the program **Microsoft Picture Manager** to open the file (**Note**: If you cannot find Microsoft Picture Manager, visit your **Start** button, choose **Programs** or **All Programs**, choose **Microsoft Office**, and then **Microsoft Office Tools**).
3. Open the photo with Microsoft Picture Manager.
4. Choose **Edit Pictures** from the top navigation bar.
5. On the right, choose **Resize**.
6. Click **Custom Width and Height** from the right side of the screen.
7. Enter the number of pixels for width in the box on the left and the number of pixels for height in the box on the right.
8. Click **OK**.
9. Go to **File** on the top navigation bar.
10. Use the **Save** or **Save As** option and finish the saving process.
11. Upload the newly sized file on your website.

### To Resize a Photo Using iPhoto

1. Save the photo on your computer in a logical place or a folder designated for photos.
2. Launch the iPhoto application from the **Applications** folder of your computer, or from the Dock.
3. Choose **File > Import to Library** from the top navigation bar.
4. When the photo appears, choose **File > Export** from the top navigation bar.
5. Click the **File Export** tab at the top of the dialog box (it may already be highlighted).
6. Choose **JPEG**, **Maximum**, and **Custom** in the drop-down menus for Kind, Quality and Size.
7. If you know the maximum number of pixels the image should be in height or width (such as 600 pixels in width for a horizontal homepage photo), choose that dimension from the **Max** drop-down menu, and enter that known value in the field (for example, “width” and “600”).
8. Choose **Use Filename** in the File Name drop-down menu, and click **Export**.
9. Name the photo (for example, *Mytown-600w*), navigate to an appropriate folder on your computer, and click **Save**.
10. Upload the newly sized file on your website.

It is not legal to copy photos from other websites without their permission. If you do a Google image search for **Your city skyline**, you will find plenty. The best ones likely appear on the websites of professional photographers. You can contact a photographer and explain your use. You can also offer to post a photo credit or link back to his/her site in exchange for the limited use of the photo.

## How to Copy and Paste a URL

Copying an address (URL) using a keyboard and mouse.

1. Highlight the address by moving your mouse cursor over the address bar and clicking the **left mouse button once** or press the **F6** keyboard shortcut to get into the address bar.



2. After the address has been highlighted, press **Ctrl+C** or **Cmd+C** on the keyboard to copy it. You can also right-click any highlighted section and choose **Copy** from the drop-down menu.
3. Once the address is copied, paste that address into another program by clicking a blank field and pressing **Ctrl+V** or **Cmd+V**. You may also right-click any highlighted section and choose **Paste** from the drop-down menu.