

Introduction

Welcome to the most versatile, 100% browser-based professional website builder and management solution that makes it simple to build and manage almost any type of website. Now you can manage every aspect of all your online organization, from web page publishing, collecting web forms and payments, to community blogs, forums and comments, to outbound e-mail campaigns. And best of all, much of the system can be mastered quickly!

The key is to separate the website's design (HTML, CSS, etc) from the website's content (text, files, photos, videos, etc.), so web designers are free to create HTML web designs (or use our built-in themes), and webmasters are free to delegate content updates and control access to features for others, free from . All without HTML files to manage, and no expensive software to load on your desktop.

How it Works

The main concept behind this data-driven solution is its simple but powerful "page-based" system, which allows webmasters to simply build a website by creating Pages, setting their interactive features, placing them into Folders, and linking them together.

Then your Content Managers are free to create and update Page content and link Pages together without any HTML programming.

The system adds powerful and professionally-designed interactive features to any new or existing website design. In a typical website, there are many HTML pages, each providing only one function - to publish to the Internet. This system offers many different interactive "Page Types", each designed to provide integrated building blocks to automatically insert interactive features like calendars, photo galleries, blogs, forums, directories, order forms, login pages, my account pages, custom forms, data views, product catalogs, and shopping carts, to any web page on your site.

You can combine these interactive pages to create simple or complex website applications without the need to know any database programming or website security. You can create roles and access control for all features and tasks so you can delegate access to management functions, design templates, content areas, and menus, providing the building blocks to create interactive client extranets, staff intranets, member portals, and other web and e-mail publishing applications - all integrated into one database driven solution.

Roles

The system is a flexible website management system that allows you to assign access to all features and delegate tasks to your work force. Here are the roles that have been created within the system to manage access to website features and content:

- Any Person with basic contact information is a "Contact"
- Any Contact with an e-mail address and opt-in status is a "Subscriber"
- Any Contact that has a Member ID, but does not have a corresponding User is an "Unregistered Member"
- Any Person that accesses a Page or File is a "Visitor"
- Any Visitor that submits Form Data is a "Submitter"
- Any Visitor that adds a Comment to a Page is a "Contributer"
- Any Visitor that views a Form List View is a "Viewer"
- Any Visitor that completes an Order is a "Customer"
- Any Visitor who registers successfully is a "User"
- Any Visitor who has registered as a Member, or granted Membership through a Custom Form or Order is a "Member"
- Any User that has been approved to earn a commission on their Orders is an "Affiliate"
- Any User with "view" rights to any Private Folder is a "Private User"
- Any User with "edit" rights to a specific Submitted Form is a "Form Editor"
- Any User with "edit" rights to any Folder or to shared content areas is a "Content Manager" †

- Any User with Content Management rights that approves Comments is a “Moderator”†
- Any User with Content Management rights that also has access to Forms is a “Forms Manager” †
- Any User with Calendar Management rights is a “Calendar Manager” †
- Any User with Commerce Management rights is an “Commerce Manager” †
- Any User with Ads Management rights is an “Ad Manager” †
- Any User with Visitor Report Management rights is a “Visitors Manager” †
- Any User with Contact Management rights is a “Contact Manager” †
- Any User with rights to send e-mail campaigns is a “Campaign Manager” †
- Any User with the Manager Role is a “Site Manager” †
- Any User with the Designer Role is a “Site Designer” †
- Any User with the Administrator Role is a “Site Administrator” †

† These privileges provide access to the Control Panel and therefore require a User license. Additional User Licenses are available for purchase as an upgrade.

Welcome

This is the Welcome screen. This dashboard displays bookmarks to the most recent site updates and latest activity across the website.

You are viewing this screen because you have either just successfully logged into the Control Panel, or you have clicked on the logo in the top lefthand corner of the Control Panel. All users that can access the Control Panel will be redirected to this screen when they first login, unless they are accessing a protected page or file, or have a "Start Page" selected in their User account.

NOTE: Each User will only see information on the Welcome screen that they have access too.

Control Panel

The Control Panel is accessible to Users with management privileges to one or more areas in the system. The Control Panel contains quick links to common features shared by all Users, located across the top of every screen.

Here is a quick overview of the Control Panel to help you get around:

Quick Links

Logo:	You can view the Welcome page anytime by clicking on the logo at the top lefthand corner of the Control Panel from anywhere within the Control Panel.
Notifications:	Occasionally, notifications might appear to the right of the logo. These notifications will alert you about various things. For example, they will warn you if your subscription has expired or if there is an available software update.
Site Settings:	This screen contains all site-wide settings and defaults for your website. Only Site Managers and Site Administrators can access and update these settings.
Hi, <i>username</i> :	This will link to your website's My Account page, where you can update your personal contact information, order history, e-mail subscriptions, etc., for your User account.
Logout:	Clicking this link will log you out of the system and redirect you to your website's Login page. Closing all browser windows will also log you out.
My Start Page:	This link will only be displayed if you have a "Start Page" defined for your User account. This feature provides a fast way to jump to your Start Page (kinda like a bookmark) from anywhere within the Control Panel.
Home Icon:	This link will go directly to any one of the Home Pages selected for your website. It provides a fast way to preview your website from anywhere within the Control Panel.
Help:	This link will launch the help window for the screen you are currently viewing. It will follow your mouse clicks and change on each click as long as you have it open.

Tabs

Below the Quick Links, the Control Panel also includes several tabs across the top. Each tab groups common sets of features together. Only tabs that you have access to will be visible to you. To learn more about each tab, click on the Tab, and click "Help" to view the documentation for the screen.

TIP: When referring to tabs in the help documentation, we enclose them in brackets, like this: [PAGES].

Navigation Bar

Below the tabs is a colored area where common links are displayed, based on the area and screen you are viewing.

Button Bar

Below the Navigation Bar is the optional Button Bar, that will contain button to create or edit properties or update features.

Main Content Area

Below the Button Bar is the main content area where you can search features and update them.

Control Panel Footer

Below the Main Content area is the Control Panel footer which may contain links to contact our sales and support teams, and the version of the software you are using.

Site Settings

This screen contains all site-wide settings and defaults for your website. Only Site Managers and Site Administrators can access and update these settings.

License

Subscription ID:	This form allows you to activate your subscription which will update the license for your site. You will be given a Subscription ID when you purchase a subscription. If you have not been given a Subscription ID, then you do not need to use this form. Generally, once you have activated your subscription, the system will automatically check your subscription daily for updates. For example, if you order more users, your subscription will eventually be updated automatically to support those additional users. Alternatively, you may click Activate again to update your subscription manually.
Domain Name:	This field might appear when you activate your subscription. It is used in order to assign a Domain Name to your site's license. Your site will only be accessible at this Domain Name or the Alternate Hostname below.
Alternate Hostname (optional):	This field might appear when you activate your subscription. It is used in order to assign an Alternate Hostname to your site's license. For example, when you are building your site, you might need to access the site at an Alternate Hostname, because the website has not been launched at the Domain Name yet.
Hosts:	Displays the hostnames (e.g. domain names, IP addresses) that are valid for this license. Accessing this website from another hostname or IP address will result in an error.
Users:	Displays the number of Users with management rights ("edit" privileges to any of the system features).
Pages:	Displays the number of total Pages that have been created.
Orders:	Displays the total number of Orders that have been created and stored.
Custom Forms:	Displays the total number of Custom Form Pages that have been created.
E-mail Recipients:	Displays the total number of Subscribers that have been included in an E-mail Campaign and the total number allowed. NOTE: The usage is a cumulative total that is increased each time a <i>new recipient</i> (unique e-mail address) is included in any Campaign. This means that you can include each existing Subscriber in as many Campaigns as you wish.
Disk Usage:	Displays the total amount of disk space used by uploaded files in your site. This number includes all files in the both the "Files" and "Design Files" areas.

General

This is the internet IP address location of your website. If you are ready to launch your website, you will need to point your domain to this web server address.

Example: If your Website IP Address is 77.58.10.18, and your website domain was mydomain.com. Login to your domain name registrar account, and modify your DNS settings and add/modify the "A" record to point to this Website IP Address:

	Host	TTL	Numeric IP
Website IP Address:	www	3600	77.58.10.18
	@ (None)	3600	77.58.10.18
	* (All Others)	3600	77.58.10.18

NOTE: Typically, in less than 24 hours, your changes will take effect across the Internet, and your Visitors begin to be directed to this web server by accessing this website using either <http://www.mydomain.com>, <http://mydomain.com>, or <http://anythinghere.mydomain.com>.

IMPORTANT: This is not the same as your DNS Server Address, so you should not need to change your Primary DNS Server or Secondary DNS Server address.

TIP: If your registrar allows you to also change the TTL, set it to the lowest number they allow. This value sets the minutes between updates, and therefore instructs the DNS servers to update their information more quickly.

This should be set to your website's domain name. For example, *www.mydomain.com* would be appropriate - don't add the "http://" on the front or any trailing characters after the domain name.

Hostname:

NOTE: If you are accessing this website through a temporary domain name, you must set this to the temporary domain name (like "mysite.temp-website.com"). When you point the DNS settings of your permanent domain name to this web server to launch your website, change this value to your permanent domain name (like "www.mysite.com"). Check this box if you are publishing or collecting sensitive information throughout the website and wish to encrypt all transmissions to and from your website.

Secure Mode:

IMPORTANT! Do NOT enable this until you have an SSL certificate enabled for your domain name on your web server. Rule of thumb: If you can access your site at https:// and your browser security "lock" icon appears, you are ready to enable Secure Mode. **NOTE:** For PCI Compliance, you should also check this box if you are using any e-commerce features. When checked, all payment information is kept safe by the system, which will automatically encrypted when transmitted over the Internet.

Support E-mail Address:

This e-mail address in the "From" field of all outbound e-mails sent by the system for administrative tasks such as sending user passwords, order receipts, auto-responders, etc. (This is not used for Campaigns).

Title:

This is the default Page Title. This can be overridden by any Page. Search engines will display this text on the link in their search results, and web browsers at the top of their window bar.

Meta Description:

This is the default Page Description. This can be overridden by any Page. Search engines will display this text on the link in their search results.

Meta Keywords:

This is the default Page Keywords. This can be overridden by any Page. Search engines will use these keywords to find matches for their searches. You should add up to ten keywords with a comma between them. More keywords are typically ignored by the search engines.

Select this option if you wish to enable the display of social networking buttons on your website.

Enable Social Networking:

Social Networking is a great way to allow visitors to your website to share your Page content with the public. We make this easy and flexible. Not only can you select exactly what social networking buttons and features you want to enable for your website audience, but you can also select the positioning of the buttons on your Pages. Since best practices dictate that these buttons should be positioned next to the content to be shared, you can easily display the buttons around the Primary System Region ("Use Page") of any Page. The Primary System Region is the perfect anchor location for the buttons since it typically contains a Page's unique content and is the only region required to be present on all Page Styles.

See Pages Styles for more information about positioning your social networking buttons on your Pages.

Please be aware that the social networking buttons will only appear on a Page if all of the following conditions are met:

- At least one social networking service is enabled.

- The Page is in a Public Folder.
- The Page has one of the following page types: Standard, Folder View, Photo Gallery, Custom Form, Form List View, Form Item View, Form View Directory, Calendar View, Calendar Event View, Catalog, Catalog Detail, or Order Form.
- The Page contains a "Use Page" System Region (see below for more information).
- The Page is not being sent as an E-mail Campaign.

Please make sure that the Hostname in the Site Settings is set to the correct/standard hostname for your website, because it will be used in all URL's that are shared.

TIP: Some times one or more of these social networking sites can be slow in responding, or offline temporarily. This will slow performance of your web pages because data is fetched from these sites each time one of your (Public) Pages is loaded. If you find your (Public) Pages loading slowly, consider disabling one or all of the social networking sites temporarily until these sites are back to responding quickly again.

Simple: Select this option if you would like predefined social networking buttons to appear on your Pages.

Setup:

Advanced: Select this option if you would like to add your own social networking code to appear on your Pages.

If you choose the "Simple" setup option, a button will appear for each service that will allow your website Visitors to share your website Pages with other people. A number may also appear next to each button which indicates the total number of times that the Page has been shared through that social networking service.

Services: When you enable Facebook, a send button and a like button will appear. The send button is used for privately sharing a link with groups and individuals, and the like button is used for publicly sharing a link on your profile.

Facebook sometimes displays an image next to a comment that someone has added when "liking" a Page. For Catalog, Catalog Detail, and Order Form Pages, Facebook will use the image that is set in the Product Group or Product properties. For all other types of Pages, Facebook will try to automatically find an image on the Page.

If you choose the "Advanced" setup option, you can add you own HTML code snippet to this area for complete control over your social networking buttons.

There are two special tags that you can include in your code snippet to embed the appropriate website content links dynamically:

`{url}`

Include this special tag to your code where necessary and it will be replaced with a link to the content to be shared when the page is displayed.

`<rss>[RSS code goes here {rss_url}]</rss>`

Code:

Include this special tag to embed the RSS feed link that might be present in the content to be shared. If no RSS feed exists, this special tag code will not be outputted.

Here's an example of using the special tags within a code snippet from AddThis.com:

```
<div class="addthis_toolbox addthis_default_style"
addthis:url="{url}">
  <a class="addthis_button_facebook"></a>
  <a class="addthis_button_twitter"></a>
  <a class="addthis_button_google_plusone"
g:plusone:count="false"></a>
  <a class="addthis_button_linkedin"></a>
```

```

<a class="addthis_button_email"></a>
<a class="addthis_button_print"></a>
<rss><a class="addthis_button_rss_follow"
addthis:url="{rss_url}"></a></rss>
<a class="addthis_button_compact"
addthis:ui_click="true"></a>
<a class="addthis_counter addthis_bubble_style"></a>
</div>
<script type="text/javascript"
src="//s7.addthis.com/js/250/addthis_widget.js"></script>

```

Check this box is you want to enable spam protection for forms. Spammers use unprotected web forms in an attempt to use another's website to post and broadcast their own advertising. To combat this malicious technique, you may enable this feature in order to have a CAPTCHA displayed for any site visitor that is not logged into the website. The CAPTCHA asks a simple challenge question that the visitor must answer correctly in order to submit the form.

Enable CAPTCHA:

If this feature is enabled, then the CAPTCHA will be displayed on the following types of forms:

- Custom Form
- Add Comment
- E-mail a Friend
- Registration Entrance (Register)

NOTE: The CAPTCHA will not be displayed to you if you are logged in.

Check this box is you want to require all Users to create strong passwords to protect their account. Strong passwords must contain:

- at least 10 characters
- at least 1 capital letter
- at least 2 numbers
- at least 1 non-alphanumeric character (e.g. !, @, #, \$, %)

Require Strong Password:

If you deselect this box, the User is allowed to create passwords of any length and value.

Once you enable this feature, it will only affect new Users and Users who choose to manually change their password. It does not affect Users who have a password that was set before you enabled this feature. They may continue to login with their old, possibly weak password.

NOTE: If the User does not meet these requirements when changing their account password, these requirements will be displayed.

Allow Mass Deletion:

Check this box is you want to allow users to mass delete multiple items in a single click using the "Delete Selected" feature on Control Panel screens.

Check this box if you want to allow Password Hints to be added/viewed Visitors are registering or Users are changing their password.

Allow Password Hint:

WARNING: This is a potential security risk. If the User enters personal data, it could be displayed to anyone attempting to login to the website.

Check this box if you want to have the website remember the User on their computer so they don't have to login each time they visit the website. A User will no longer be remembered once the User logs out.

The remember me check box on a login form will be unchecked by default when the Visitor

views a login form for the first time. If the User logs out and views a login form in the future, then the remember me check box will be set, by default, to whatever selection the Visitor selected the last time.

- Allow Remember Me: **WARNING:** This is a potential security risk. If the User leaves their computer unattended, someone could go to the website and get access to their User account without being prompted to login first. To protect against this, be sure your website managers click "logout" from the Control Panel and this feature will be reset.
- Select this check box if you want to allow your Users to request their password be e-mailed to them. If enabled, this link will appear on all Login Pages.
- Forgot Password Link: **NOTE:** To keep passwords secure, the original password is deleted and a new temporary password is generated and e-mailed to the User. They will then be instructed to change their password the first time they log in with the temporary password.
- Change Password Link: Select this box if you want to allow your Users to change their password. If enabled, this link will appear on all Login Pages.
- Verbose Database Errors: Select this check box if you are experiencing database errors and would like to display the actual errors returned from the database server (instead of the "user-friendly" error messages).
- Proxy Address: If all website communication must travel through a proxy server within your local area network, enter the proxy IP address here. Otherwise, leave it blank, which is typically the correct setting. Contact your network administrator for this value.
- Badge Label: Please enter a word that you wish to be used as the "Special" users badge. You can change this value at any time and all badges will be updated instantly. (See Create/Edit Users for more information).

Rich-text Editor

- Editor Version: This is the version of the Rich-text editor that will be used. It is recommended that you leave this field set to "Latest", so that you get the full benefits of using the newest version of the Rich-text editor. However, if you notice any issues with the "Latest" Rich-text editor, then you can switch to the "Previous" version.
- Font Selection: Select this to make the font selections drop-down menu visible within the Rich-text Editor.
- Font Size Selection: Select this to make the font size selections drop-down menu visible within the Rich-text Editor.
- Font Style Selection: Select this to make the font style selections drop-down menu visible within the Rich-text Editor.
- Font Color Button: Select this to make the font color button visible within the Rich-text Editor.
- Background Color Button: Select this to make the background color selection button visible within the Rich-text Editor.
- Spell Checker Engine: Specifies the spell checker engine visible within the Rich-text Editor. Each time the spell checker is launched, an attempt is made to connect to the Google Spell Checker website over the Internet. If this website cannot be reached, the spell checker will be disabled for that edit session.

TIP: Disabling Font & Color Selections prevents Content Managers from using their own styling for content when using the Rich-Text Editor. This is ideal for Site Designers that wish to maintain consistent styling of content throughout the website. If you disable this feature, be sure to add Custom Formats to your CSS stylesheet file for Content Managers to use instead. These Formats appear as a drop-down menu within the Rich-text Editor.

Registration

- Registration Contact Group: When a person registers on your website (completes a Registration Entrance Page), a Contact is automatically created for the newly registered User. The Contact will be assigned to this Contact Group.
- When a person registers on your website (completes a Registration Entrance Page), you can have a copy of the Registration Confirmation Page e-mailed to this address. This provides a

Registration E-mail Address:	<p>way to audit new website registrations in real-time.</p> <p>TIP: If you need to notify more than one person when a registration occurs, you can specify multiple e-mail addresses, separated by a comma.</p>
Membership	
Member ID Label:	<p>Specify the text label that is displayed to the left of the Member ID field on your Membership Registration Page.</p> <p>TIP: This feature allows you to alter how the Member ID field label will be displayed. For example, you might label this field "Account Number", "Customer No.", or "Membership #".</p>
Membership Contact Group:	<p>When a person registers on your website (completes a Membership Entrance Page), a Contact is automatically created for the newly registered User. The Contact will be assigned to this Contact Group.</p> <p>When a person registers as a Member on your website (completes a Membership Entrance Page), you can have a copy of the Membership Confirmation Page e-mailed to this address. This provides a way to audit new website memberships in real-time.</p>
Membership E-mail Address:	<p>TIP: If you need to notify more than one person when a registration occurs, you can specify multiple e-mail addresses, separated by a comma.</p>
Send Expiration Warning E-mail to Members:	<p>Enabling this option will automatically send a warning e-mail to each Member before their membership expires. The Membership E-mail Address will also receive a Blind Carbon Copy of the email message when it is sent.</p> <p>NOTE: You must enable the Membership scheduled task (also known as a "cron" job) for this feature to work. Please contact your web server administrator for assistance.</p>
Subject:	<p>Enter the subject line of the e-mail to be automatically sent each day to any expiring Members.</p> <p>NOTE: The expiration date will be appended automatically to the subject line when the e-mail is sent.</p>
Page:	<p>Select the Page that will be e-mailed to each Member when their membership is close to expiring. (See the Send field below.)</p> <p>Enter the number of days before memberships expire that will be used to determine when each expiring member is automatically e-mailed their membership expiration warning page (above).</p>
Send:	<p>NOTE: Since you can manually change a Member's expiration date at any time, if you do, and change it to a date previous to when an expiration warning message would have been sent, then no expiration warning e-mail will be sent to that Member.</p>
Forms	
Enable Forms:	<p>Deselect this option if you are not using Custom Forms and would like to hide the [FORMS] tab from the Control Panel.</p>

Calendars

Enable Calendars: Deselect this box if you are not using the Calendars features and wish to hide the [CALENDARS] tab from the Control Panel.

Campaigns

Organization Name: Enter your organization's name that will be added to each e-mail message footer of every e-mail Campaign.

NOTE: This is required for CAN-SPAM Act compliance and cannot be removed.

Organization Address 1:	<p>Enter your organization's street address (line 1) that will be added to each e-mail message footer of every e-mail Campaign.</p> <p>NOTE: This is required for CAN-SPAM Act compliance and cannot be removed.</p>
Organization Address 2:	<p>Enter your organization's street address (line 2) that will be added to each e-mail message footer of every e-mail Campaign.</p> <p>NOTE: This is required for CAN-SPAM Act compliance and cannot be removed.</p>
Organization City:	<p>Enter your organization's city that will be added to each e-mail message footer of every e-mail Campaign.</p> <p>NOTE: This is required for CAN-SPAM Act compliance and cannot be removed.</p>
Organization State:	<p>Enter your organization's state/province that will be added to each e-mail message footer of every e-mail Campaign.</p> <p>NOTE: This is required for CAN-SPAM Act compliance and cannot be removed.</p>
Organization Zip Code:	<p>Enter your organization's zip/postal code that will be added to each e-mail message footer of every e-mail Campaign.</p> <p>NOTE: This is required for CAN-SPAM Act compliance and cannot be removed.</p>
Organization Country:	<p>Enter your organization's country that will be added to each e-mail message footer of every e-mail Campaign.</p> <p>NOTE: This is required for CAN-SPAM Act compliance and cannot be removed.</p>
Opt-In Label:	<p>This is the text message that is displayed next to the opt-in check box on E-mail Preferences, Billing Information, and Express Order Pages where Contact's can choose to opt-in to receive any future e-mail Campaigns.</p> <p>NOTE: The opt-in check box only appears on the Billing Information and Express Order Pages if a Contact does not exist for the Visitor (e.g. new visitor) or if the Visitor is opted-out, so that Visitors are not encouraged to opt-out. Also, the opt-in check box is always checked by default.</p>
<p>Commerce</p> <p>Select this check box to enable the [COMMERCE] tab in the Control Panel. Unselecting this option does NOT disable the e-Commerce features in your website. This option is only used to unclutter the Control Panel.</p>	
Enable E-Commerce:	<p>IMPORTANT: To accept credit card information on your website, you will need to upgrade your hosting plan to include a secure server environment so your customer's personal information can be safely transmitted over the Internet. This includes a dedicated IP address and a Secure Server (SSL) Certificate for your domain name. Contact your hosting provider for more details and pricing.</p>
Multi-Currency:	<p>Select this check box if you wish to allow Customers to change the currency displayed on all Pages that display product and order pricing information. You can set the default currency to any world currency, and the conversion rates can be updated each day automatically.</p>
Tax:	<p>This enables tax to be calculated and displayed on the appropriate Commerce Pages. You can give your Customers the option of removing tax from their own Orders. If selected, the "Tax-Exempt?" check box will be available to your Customers on the Billing Information Pages and Express Order Pages.</p>
Allow Tax-Exempt:	<p>TIP: You might use this features to set up a separate checkout process for your resellers.</p>
Tax-Exempt	<p>Enter the text message that will be displayed for the Customer next to the Allow Tax-Exempt Check box field (above).</p>

Label:

For example: "Check this box if your organization is exempt from sales tax."

During the checkout process this feature will verify that shipping addresses and billing addresses that are entered by the customer are valid. This feature will also format the address to match the USPS mailing standards for faster delivery. If the USPS considers the address to be invalid, the customer will still have the option of using the possibly invalid address if the customer is sure it is correct.

Verify US Addresses: This feature requires a USPS Web Tools account that is approved to use the Address Standardization service. Please contact <http://www.usps.com> for more information. Once your account has been approved by USPS, you must enter your USPS Web Tools User ID in the field below, in order for the feature to work.

NOTE: You will know when the feature is working when you enter an invalid address and you receive an error. When the feature is working, shipping addresses are standardized and converted into upper-case. Alternatively, billing addresses are standardized and converted into proper-case. If there is a communication or authentication problem, the system will assume that the address is valid and will not display an error to the customer. Communication and authentication errors will appear in the Site Log.

USPS Web Tools User ID: When you sign up for a USPS Web Tools account you will be given a User ID. Enter that User ID here so that the system can access your USPS account to verify shipping addresses. Please be aware that you do not need to enter a password.

Shipping: Check this box if there are any "shippable" Products purchased through your website. This will display shipping subtotals on any Express Order Pages, Order Preview Pages, or Order Receipt Pages.

NOTE: Shipping subtotals will be hidden automatically if there are no "shippable" Products in the Shopping Cart Page, regardless of this setting.

Recipient Mode: **Single Recipient:** If you wish to only allow one recipient (shipping address) per Order, check this box.

Multi-Recipient: If you wish to allow unlimited recipients (shipping addresses) per Order, check this box.

Product Restriction Message: If one or more shippable Products in the Shopping Cart Page cannot be shipped to the recipient's address (determined by the Product's Allowed Zones), this message will be displayed under the Product in question on the Shipping & Arrival Page.

For example: "We're sorry. The item you have selected cannot be shipped to the destination you selected. You will need to remove the item to complete your order."

No Shipping Methods Message: If one or more shippable Products in the Shopping Cart Page cannot be shipped to the recipient's address (determined by the Shipping Methods), this message will be displayed under the Product in question on the Shipping Methods Page.

End of Day Time: This is the hour and minute of each work day (CST) when Orders for the day are no longer processed on the same day (logistically from your physical warehouse). In theory, Orders received after this time will not be processed by your staff until the next day, so in that case, 1 will be added to the Arrival Date calculation. The current server time is displayed so that you can set the time more accurately.

TIP: This feature works in conjunction with the Arrival Date entered and displayed on the Shipping & Arrival Page. This feature allows you to let your Customer's enter a requested arrival date and the system will ensure that the Products can be delivered to each recipient in time, or prompt your Customer to make a different selection.

Next Order Number: This is the Order Number that will be assigned to the next Order successfully submitted. It must be a numerical value without spaces.

When a Customer submits an Order, and the Order Receipt Page is displayed, this e-mail

E-Commerce E-mail Address:	<p>address will receive a copy of the Order Receipt Page that has been e-mailed to the Customer. This provides a way to audit new Orders in real-time, or send copies of all Orders to a mailbox automatically.</p> <p>TIP: If you need to notify more than one person when an Order is placed, you can specify multiple e-mail addresses, separated by a comma.</p> <p>Select this option to accept Givex gift cards as a form of payment for Orders.</p>
Accept Gift Cards:	<p>Givex offers branded physical gift cards that can be mailed to your customers and redeemed online. Your customers can enter a gift card code (found on their physical gift card) on the Order Preview Page or the Express Order Page, and apply the balance to their Order total. Multiple gift cards can be redeemed on the same Order. If the customer's gift card does not have enough balance to cover the entire order total, the Customer will be required to select another payment method (i.e. Credit/Debit Card, PayPal, or Offline Payment) to supplement the payment.</p> <p>NOTE: To setup gift cards, create an account with Givex at http://www.givex.com. They will provide you with the Primary Hostname, Secondary Hostname, User ID, and Password. Enter this information and the feature will be enabled.</p> <p>Select this option in order to accept credit/debit cards online. In order to accept credit/debit cards, you should have an SSL certificate and have Secure Mode checked above, so that credit/debit card information is encrypted during transmission.</p>
Credit/Debit Card:	<p>If a payment gateway is selected below, then the transaction will be processed automatically by the payment gateway. In this case the card number and verification number will not be stored in order to comply with the Payment Card Industry Data Security Standard (PCI DSS).</p> <p>If you do not select a payment gateway, then you can capture credit/debit card information and manually process the transaction later through a different service (e.g. your bank's website, swipe machine, or etc.). The system will attempt to validate that the credit/debit card type and numbering scheme is legitimate, but it does not actually attempt to determine if the card has any funds available. The card number will be encrypted in the database, in order to comply with PCI DSS, if the MEncrypt PHP extension is enabled. Also, as required by PCI DSS, you should remove the card data, via the All Orders screen, after the transaction has been manually processed. Only Commerce Managers, Site Managers, Site Designers, and Site Administrators will have access to the stored information.</p> <p>Select the payment card processors (credit/debit) that your merchant account (and/or bank) will accept on your behalf.</p>
Accepted Cards:	<ul style="list-style-type: none"> • American Express • Diners Club • Discover Card • MasterCard • VISA
	<p>NOTE: If you are using a payment gateway, be sure that your selections match those approved by your payment gateway provider.</p> <p>TIP: You can enable both PayPal Express Checkout payments AND credit/debit card payments on your website.</p>
	<p>None to accept Orders without processing payments in real-time.</p>
	<p>Otherwise, select one of the following supported payment gateways to authorize and/or capture credit/debit cards payments in real-time at the point of purchase:</p>

- **Authorize.net**
- **ClearCommerce / PayFuse**
- **First Data Global Gateway (formerly LinkPoint / YourPay)**
- **Paypal Payflow Pro**
- **PayPal Website Payments Pro**
- **Sage (Sage Payment Solutions, not Sage Pay)**

NOTE: If you are looking for **PayPal Express Checkout**, then please see further below in the site settings. PayPal Express Checkout is considered a "payment method" instead of a "payment gateway". It can be used along with a payment gateway.

Your funds are deposited into your bank account directly. The advantage to a payment gateway is that the funds are available to you very quickly, and you can handle any disputes directly.

Payment Gateway Setup

Apply for an Internet Merchant Account with your depository bank. (You do not need to purchase the banks' third-party gateway or software. They will try to tell you that you need it, but you do not!)

The Internet Merchant Account will allow you to connect your website with the banking system so that payments made through your website can be deposited securely into your bank account.

You will need your bank to send you the following upon approval:

Payment
Gateway:

1. Your banks' Processor
(Paymentech - Salem; Vital; Nova; FDMS South; American Express; Global Payments - Central; Global Payments - East; FDMS North; Paymentech - Tampa; American Express Brighton; or TeleCheck)
2. Processors' Merchant ID (also called an "M.I.D.")
3. Processors' Terminal ID (also called a "T.I.D.")
4. Bank Cards agreements (for example, accepting American Express requires a separate contract for fees).

Once you have this information from your bank, contact one of the supported payment gateways (above) and apply for an account with them. They will need this information in order to set up an account for you. Each payment gateway requires a service contract and the fees will vary. Please contact them directly for more information.

Now, enter the payment gateway account credentials they provided you and the website will be ready to accept payments online:

- API Login ID and Transaction Key from Authorize.net
- Client ID, User ID, and Password from ClearCommerce / PayFuse
- Store Number and PEM File from First Data Global Gateway (formerly LinkPoint / YourPay)
- Partner, Merchant Login, User, and Password from Paypal Payflow Pro
- API Username, API Password, and API Signature from PayPal Website Payments Pro
- Merchant ID and Merchant Key from Sage

NOTE: We do not charge a processing fee for any transactions you collect through the website.

Authorize: To validate the credit/debit card and place a "hold" for the amount of the order Transaction total, which may need to be adjusted. The funds are captured at a later date.

Type:

Authorize & Capture: To always capture payment at the point of purchase.

Sandbox: Order payments are sent to the payment gateway, but the card is NOT actually charged. Select this option when you are using the PayPal Website Payments Pro payment gateway and you want to submit test Orders using real credit card numbers.

Mode:

Live: Select this option after you have verified that test Orders have been successfully processed through the payment gateway and you want valid credit cards to be charged in real-time.

Check this when you want to reset the key that is used for encrypting credit/debit card numbers in the database. You only need to do this if you are accepting credit/debit cards and you are not using a payment gateway. The Payment Card Industry Data Security Standard (PCI DSS) requires that this be done at least once per year. When you check this, a new encryption key will be generated which replaces the old key, and all existing and future card numbers in the database will be encrypted with the new key.

Reset
Encryption
Key:

An initial encryption key is automatically generated when the system is first installed. The encryption key is stored in the config.php file and should not be modified or shared with anyone. Please do not attempt to update the encryption key in the file yourself. The system will automatically generate and update the key in the file for you. If the site is moved to a new server, please be aware that you will need to maintain the same key in the file in order to access card numbers.

Select this option if you want a PayPal payment method to appear on the Express Order or Order Preview Page. When the Customer selects the payment method, then he/she will be forwarded to PayPal's website to make payment. On PayPal's website the Customer will have the option of either paying by credit/debit card or paying with their PayPal account. The Customer will not be required to log in or sign up for a PayPal account, if he/she chooses to simply pay by credit/debit card. The Customer will be forwarded back to your website after completing payment on PayPal's website.

PayPal Express Checkout is good if you don't want to hassle with getting a merchant account from your bank. The advantage to accepting PayPal is that your international customers and others that don't trust you with their credit card information will likely purchase from you. The disadvantage over a payment gateway is that PayPal is actually collecting the funds and you are paid at a later date.

PayPal Express
Checkout:

To use PayPal Express Checkout you simply need a PayPal business account. You can generally convert any PayPal account into a business account for free. Once you have the correct account type, then follow their processes in order to get an API Username, API Password, and API Signature for PayPal Express Checkout. Once you have that information, then enter it into the site settings here.

Please be aware that you can enable both the credit/debit card payment method and the PayPal Express Checkout payment method at the same time. The credit/debit card payment method will allow you to take credit/debit cards directly on your website, normally with a payment gateway account, and the PayPal Express Checkout payment method will allow your Customers to pay via credit/debit card or their PayPal account on PayPal's website. The two payment methods will appear as two different choices on the Express Order or Order Preview Page.

With PayPal Express Checkout the entire ordering process (e.g. adding Products to the cart, checking out, order receipt), except for making payment, will still take place on your website.

Shipping address/information will be sent to PayPal if shipping is enabled and shipping is in single recipient mode or there is only one recipient for the order and that recipient is

"myself". PayPal may use this shipping information to prefill fields or show information to the Customer. Information for all Products in the Order (e.g. description, price) will also be sent and should appear to the Customer on PayPal's site. Product information is only sent if there is no gift card applied to an Order, due to complications with PayPal concerning gift cards.

This feature will allow your customers to complete an Order without having to provide payment information at that time. This is useful when invoicing customers is required for specific customers or large purchases.

Since all orders and customers may need to be treated differently, you can:

- Allow Offline Payments:
1. Allow offline payments for all order
 2. Allow the customer to choose their payment method for each order
 3. Specify specific orders can be placed using the Offline Payment method

NOTE: If you want to specify which orders can be placed using the Offline Payment method, you can do this through the User accounts. Users who have access to "Allow User to set offline payment option for orders" will be able to enable and disable this feature for any incomplete order created by selecting the "Allow offline payment option for this ..." that appears to them when they view an incomplete order through the Shopping Cart or Express Order Page.

Only on specific orders:

This will either allow or disallow offline payments automatically for all customers.

NOTE: This setting can be overridden by selecting the "Allow offline payment option for this Cart" while on the Shopping Cart or Express Order Pages.

Reorder/Retrieve Order Next Page:

When a Customer clicks "reorder" from a Order View Page, or retrieves a Saved Cart from their My Account Page, this is the Page that you can direct them to so they can begin your checkout process.

TIP: This is usually an Express Order Page.

Prevent Specific Visitors from Submitting Orders:

This feature gives you the ability to block users from ordering products and services from your site based on their IP address. A blocked visitor will be able to add products to his/her cart and check out, but he/she will not be able to complete the order at the end of the process. Generally, this feature is used in order to prevent fraudulent orders from a repeat offender. You can find any past customer's IP address by viewing their orders in the Commerce section.

Enable Reward Program:

This feature allows you to setup a reward program where any Users can accumulate reward points for each purchase of certain Products. Once the specified number of points (the goal) are accumulated for a User, they can be granted Membership for a specified amount of time and/or sent an e-mail. You can set reward points for a Product by editing the Product.

Goal:

Set the number of points that each User must accumulated before they will receive their reward.

Grant Membership:

Select this option if you would like to grant access to all Membership Folders to each User if they meet the Goal.

Membership Length:

Enter the number of days that will be added to the User's Membership when the Goal is met.

Send E-mail:

Select this option if you would like to send an e-mail to each User if they meet the Goal.

BCC E-mail Address:

Enter an e-mail address that will receive a Blind Carbon Copy of the e-mail sent.

Subject:

Enter the subject line of the e-mail to be sent.

Page:

Select the Page that will be sent when the Goal is reached by each User.

Affiliate Program

Enable Affiliate Program:

Check this box to enable the Affiliate Program and display Affiliate Commissions.

Default Commission Rate:	<p>Set the default commission rate assigned to every future Affiliate when they are approved.</p> <p>TIP: This rate can be manually changed for each Affiliate at any time (through their Contact), and each Product can override this commission rate as well.</p> <p>Check this box if you want all Affiliates approved instantly upon submitting an Affiliate Sign Up Form.</p>
Automatically Approve Affiliates:	<p>Deselect this check box if you want to notify the Administrator for manual approval instead.</p>
Affiliate Contact Group:	<p>When a person signs up to be an affiliate, (completes the Affiliate Sign Up Form), a Contact is automatically created for the newly registered User. The Contact will be assigned to this Contact Group.</p> <p>Specify the e-mail address for the person that will be responsible for approving and managing the Affiliates. They will automatically be sent all approval requests and sign up form notifications.</p>
Administrator E-mail Address:	<p>TIP: If you need to notify more than one person when an application is submitted, you can specify multiple e-mail addresses, separated by a comma.</p> <p>Select an optional Group Offer from any existing Offer Code. Group Offers allow you to strengthen your Affiliate Program by offering discounts to the affiliate's referrals.</p>
Group Offer:	<p>Here's how it works: If a Group Offer is selected, every time an Affiliate Signup Form Page is submitted (e.g. a new affiliate), the system will instantly create a corresponding Key Code to this Group Offer using the affiliate's own Affiliate Code. This allows any shopper that uses the Affiliate's Code when ordering to not only provide the affiliate with commission, but also receive a discount as defined by the Group Offer. This concept creates more incentive for the shopper to use the Affiliate's Code since it doubles as an offer code too. Promoting this unique concept to your affiliates will produce more traffic and orders.</p>
Enable Visitor Tracking:	<p>Visitors</p> <p>Select this check box if you want to collect website visitor statistics for the Visitor Reports found in the [VISITORS] tab.</p> <p>TIP: If you are not interested in who is visiting your website, you can turn this off to improve performance of your website.</p> <p>This flag (text from within a tracking code) is used by all Visitor Reports to determine what tracking codes are considered "pay-per-click" visits to your website.</p>
Pay Per Click Tracking Code Flag:	<p>Lets say you place an ad on a search engine or other website and you want to track the referring paid clicks vs. the free clicks. You want to apply that tracking information to create a Visitor Report to determine how many Pages, Orders, Submitted Forms, or Membership Registrations, for example, were received from the specific website or ad.</p> <p>To do this, you might create a link to a page and tracking code like this: <code>"/pages/home?t=ppc_google_ad_number1"</code></p> <p>If you set this flag to <code>"ppc_"</code>, then any visits with a tracking code that contains <code>"ppc_"</code> would be considered a pay-per-click referral, and will appear as such on all Visitor Reports.</p> <p>TIP: The flag only modifies the Reports, and not the underlying visitor data, so you can change this flag at any time and the Visitor Reports will be recalculated for you.</p>
Web Analytics URL:	<p>If you have integrated a third-party statistics program like Google Analytics into your website, this feature will place a handy bookmark to that service's website. Just enter a URL to the site's login page and a link will appear within the Visitors tab for your Visitor Report Managers to see.</p>

If you would like to track your site visitors with Google Analytics, sign up for a Google Analytics account, and then check this check box and enter the Web Property ID below. Once enabled, a snippet of code will be added to all Pages (except during e-mail campaigns), which will allow Google Analytics to track your site Visitors.

Enable Google Analytics:

Also, once enabled, ecommerce data (i.e. order totals and items) is automatically sent to Google Analytics. This allows you to view ecommerce data in your Google Analytics account (e.g. track revenue from visitors). You must also enable ecommerce tracking in your Google Analytics control panel for this to work. Data for non-recurring products and recurring products where the first payment is on the order date will be sent to Google Analytics. Data for recurring payments in the future will not be included, because Google Analytics does not support it.

Web Property ID:

You must enter a Web Property ID in order to enable the Google Analytics feature. You may find the Web Property ID within your Google Analytics account. The Web Property ID (also known as the UA Number) normally has the following format: UA-XXXXXX-YY (where the X's represent the account number and the Y's represent the profile number). You can enable or disable the Who's Online feature if it is active.

Enable Who's Online: NOTE: You will only see this setting if you have signed up for Who's Online. For more information on how to sign up, click on the 'Who's Online' button found within the Visitors tab.

Select any File previously uploaded to your site to display as your Chat "available" button.

Online Chat Button:

If you set this to "none" the chat button will be hidden automatically from all pages if your chat operators are online.

NOTE: You will only see this setting if you have signed up for Who's Online. For more information on how to signup, view the Visitor tab.

Select any File previously uploaded to your site to display as your Chat "not available" button.

Offline Chat Button:

If you set this to "none" the chat button will be hidden automatically from all pages if your chat operators are offline.

NOTE: You will only see this setting if you have signed up for Who's Online. For more information on how to signup, view the Visitor tab.

Search Engine Optimization

This system automatically generates sitemap.xml content for Pages that have been set to be included in the sitemap.xml file, however if you have content outside of this system that you want search engines to know about, then you may enter that additional sitemap.xml content here. You should only include <url> elements, like the example below. Do not include parent elements (e.g. <urlset>) or other code.

Additional sitemap.xml Content:

```
<url>
  <loc>http://www.example.com/example_1.html</loc>
</url>
<url>
  <loc>http://www.example.com/example_2.html</loc>
</url>
```

The sitemap.xml file may be accessed at the following location:

<http://www.example.com/sitemap.xml>

Additional robots.txt Content:

This system automatically generates robots.txt content in order to point search engines to the sitemap.xml file, however if you need to add additional robots.txt content you may enter it here. The robots.txt file may be accessed at the following location:

<http://www.example.com/robots.txt>

Language Translation

If you want to allow your site Visitors to have the option of translating all Pages, Menus, Buttons, and everything on the website (except images) into virtually any language, select this option.

We have teamed up with the language translation engine makers of Yahoo! Babelfish to fully integrate their state-of-the-art language translation technology into the system.

Enable Translation:

To use this features, you will need to:

- Enable this setting
- Have your Site Designer add a <translation></translation> tag to your Page Styles.
- Sign up for a service contract (Contact us for more information and pricing).

API ID:

Enter the API ID that is issued to you once you have purchased the translation service.

This allows your website to make translation requests to the translation server.

Source Language:

This is the language that your original website content is written in.

Select the languages that you wish to offer translation to from your Source Language. This build the selection list that is displayed to your site Visitors.

Target Languages:

NOTE: Your translation service account must be setup to match your Source and Target Languages for the translation feature to work correctly.

Site Log

This screen allows you to audit all website events and changes to any website feature by any site Visitor or User.

Every action is logged, from login attempts, to updates to Folders, Pages, Files, Calendars, to Users, Contacts, Campaigns, and Commerce.

Each action is tracked by IP address of the computer where the action originated.

Entries that are older than 6 months will be automatically deleted in order to increase website performance and save disk space.

My Folders

"Folders" hold all your website Files and Pages.

- Folders offer you a way to organize similar Pages and Files.
- Folders determine who can view and edit the contents of the Folders.
- Folders provide a way for all Pages placed into the Folder to share common design and content.
- Folders provide a way to archive Pages and Files.

Viewing My Folders

My Folders screen displays all the Folders that you have access to. Folders and their contents are color-coded, based on their access control:

Public Folders: (*shown as gray text*) Select this access control option if you want Pages and Files in this Folder to be accessible to all website Visitors.

Guest Folders: (*shown as orange text*) Select this access control option if you want Pages and Files in this Folder to be accessible to all website Visitors, with registration optional.

Registration Folders: (*shown in blue text*) Select this access control option if you want Pages and Files in this Folder to be accessible to all website Visitors, but not until they have registered first.

Membership Folders: (*shown as green text*) Select this access control option if you want Pages and Files in this Folder to be accessible ONLY to website Visitors that have registered successfully as a member using a matching Member ID.

Private Folders: (*shown as red text*) Select this access control option if you want Pages and Files in this Folder to be accessible ONLY to Users that have been specifically been granted View or Edit access to this Folder.

Click on the Folder icon to expand or collapse the Folder and display it's contents. Click on the Folder name to edit the Folder.

If the Page's Page Style has been overridden by the Page itself, it will be displayed.

Archived Folders are shown in italic.

NOTE: Design Files are displayed in a light gray color. If you are a Site Designer, then you can click on the filename as a shortcut to access the Design File directly from this screen.

Create/Edit Folder

You can create new Folder under any existing Folder you have "edit" rights too. You can set the access control and style for all Pages and Files placed in the Folder, or let those properties get inherited from the Parent Folder.

Folder Name

Folder Name: This is the Name of the Folder. It can be changed at any time.

Parent Folder

Parent Folder: Select any existing Parent Folder for this Folder. This Folder will inherit the Parent Folder's Access Control Type, and Page Style by default.

Access Control for all Pages and Files within this Folder

This is the Access Control that is applied to all Pages, File, and Custom Form Data placed into this Folder. For more information on these Access Control Types, please see Users.

Select "Default" to inherits the value from this Folder's Parent Folder. Otherwise, select one of the following:

Public: Select this if you want Pages and Files in this Folder to be accessible to ALL Website Visitors.

Access Control Type: **Guest:** Select this if you want Pages and Files in this Folder to be accessible to ALL Website Visitors, with registration optional.

Registration: Select this if you want Pages and Files in this Folder to be accessible to ALL Website Visitors, but not until they have registered first.

Membership: Select this if you want Pages and Files in this Folder to be accessible ONLY to Website Visitors that have registered successfully as a member using a matching Member ID (See Contacts).

Private: Select this if you want Pages and Files in this Folder to be accessible ONLY to Users that have been specifically been granted View or Edit access to this Folder.

Default Page Style for Pages within this Folder

Select "Default" to inherit the value from this Folder's Parent Folder. Otherwise, select one of the Desktop Page Styles that have been created by the Site Designers.

Desktop Page Style: NOTE: Desktop Page Styles are any System Page Style that is NOT a "Mobile One Column" Page Style (or a Custom Page Style that does not have `one_column_mobile` CSS class assigned to it's HTML `<body>` tag.)

Mobile Page Style: Select "Default" to inherit the value from this Folder's Parent Folder. Otherwise, select one of the Mobile Page Styles that have been created by the Site Designers.

NOTE: Mobile Page Styles are any System Page Style that is a "Mobile One Column" Page Style (or a Custom Page Style that has `one_column_mobile` CSS class assigned to it's HTML `<body>` tag.)

Display order of this Folder to other Folders

Order: The Sort Order for this Folder to be displayed in the Folders.

Archive Folder for Pages and Files that are no longer being used

Archive: This will archive all Pages and Files that are directly inside of this Folder (this will not archive sub-folders). This feature is generally used to allow you to unclutter the system without having to delete items. Archived items will no longer appear in various lists (e.g. All My Pages, All My Files, pick lists). Archived Pages may only be viewed by Users with edit rights to the Page, however archived Files may still be viewed by anyone, depending on access control.

Once a Folder is created, you can still change it's Parent Folder at any time.

All My Pages

This screen displays all the Pages that you have access to, except archived Pages (see All My Archived Pages). It is the combination of all other Page listings.

The system is a "page-based" system, meaning most of building your website is done by creating Pages, setting design styling, interactive properties, adding content, and then linking them to other Pages.

Viewing & Editing Pages

You can view and edit any Page you have access to by selecting the Page from any of the Pages screens, which are grouped by Page Type. Some of the Page's properties are also visible.

Searching Pages

You can enter a search term in the box on this screen and search for any Page by it's properties. (Page content is excluded from the search).

Modifying Pages

You can modify the Folder, Page Style, search, and sitemap.xml options for one or more Pages by selecting the Pages you wish to modify and clicking "Modify Selected". Since access control is handled by the Page's Folder, modifying the Page allows you to easily protect a Page.

WARNING: Since changing a Page's Folder effects it's access control, you can accidentally make a Private Page accessible or a Public Page inaccessible to others attempting to view the Page. Keep this in mind when moving Pages among Folders.

WARNING: Moving a Page can also change the Page's Page Style, which could accidentally hide Page Region content and include new common content. If this happens, you can always change the Page Style back to the original Page Style and the Page Regions will reappear. Page Regions are never lost unless you delete the content or delete the Page itself.

E-mailing Pages

You can easily e-mail any Page in it's native HTML-format (and text format) to a single recipient or a group of recipients, we call "Subscribers".

There are two ways to e-mail a Page:

- **Campaigns.** Pages can be e-mailed to any number of Subscribers using the built-in Campaign feature. This allows you to send e-newsletters, e-announcements, and promotional messages to your customers, members, and prospects. You must have access to these features in order to use them.
- **Auto-responders.** Pages can be sent by the system in response to an action taken by a Visitor, like when an Order is placed, a Custom Form is submitted, or a specific Product is ordered.

Creating Pages

To create a Page, click on "Create Page" or view an existing Page and click "Duplicate Page".

Commenting on Pages

To comment on a Page, be sure that Comments are enabled in the Page's Properties. This will display the Comment

form on the Page. If CAPTCHA is enabled in the Site Settings, then comments are protected from SPAM. Spammers use unprotected web forms in an attempt to use another's website to post and broadcast their own advertising. To combat this malicious technique, all Comment forms have a built-in CAPTCHA feature that is automatically enabled if it Comment form is displayed to any site visitor that has is not logged into the website. The CAPTCHA asks a simple challenge question that the visitor must answer correctly in order to submit the Comment.

Deleting Pages

To delete a Page, select the Page you wish to delete and click "Delete Selected". Only the Page (and it's Properties such as Custom Form or Form List/Item View Layout), Page Regions, Comments, and Comment Attachments are deleted. Menu and Ad Regions, Ads, and all other common regions and their content as well as it's Page Style remain.

Desktop / Mobile Page Styles

Clicking on "show mobile" or "show desktop" will toggle the display of the Page's Page Style that will be used by the mobile detection feature to display the Page to your site visitors. If the Page Style is colored red, it means that the system could not find a Mobile Page Style for the Page, and it will default to use the Desktop Page Style to display the Page to mobile (phone) visitors. You should consider adding a Mobile Page Style for any Page that does not have one defined for it.

NOTE: The Delete Selected button only appears for Users that have access to delete Pages.

WARNING: Take care when deleting Pages, there is no UNDO.

Editing Page Content

A "Page" is a web page on your website that can be viewed or edited. Pages are constructed "on-the-fly" in real-time when requested from a website Visitor, and are made up of the following:

- **Page Content.** Page's contain "Page Regions" that hold text and images, just like word processor document. Page Regions exist on only the one Page, and are not shared by other Pages.
- **Interaction.** Each Page can also provide a website function, like a login page, a custom form page to gather data, a catalog page to display products, or one of dozens of other interactive "Page Types" built right into the system. These Pages of various Page Types are then linked together to build custom work flow into your website.
- **Design & Shared Content.** Each Page's content and interaction is then wrapped in an HTML design, called a "Page Style". A Page can define it's own Page Style, or share the Page Style with other Pages in the same Folder. Page Styles also define a Page's shared content, like site-wide menus, or sidebars that appear only on a certain section of the website. These shared content areas include "Common Regions", "Ad Regions", and "Menu Regions".
- **Page Comments.** Each Page can also contain Comments. Comments contain an author and textual content which is attached to the Page and exist as long as they are not deleted and the Page still exists. Comments are not duplicated when a Page is duplicated. Anyone with edit rights to the Page's Folder can edit, delete, or publish the Comments (Moderator). For true authorship verification, the User name of the Contributor will be revealed to the Page Moderator, if known, regardless of what is entered in the author field.

Edit Mode & View Modes

The system has a built-in process for create and editing content that is seamlessly integrated into every Page. While you remain logged in, you can browse through the site, Page by Page, stopping to edit content, link to content, upload photos and videos, and continue on building and updating your website, using only your web browser.

If you click the "grid" button on the top right corner of a Page, any editable region found on the Page (you have access too) will be outlined with dashed lines and a corresponding colored "Edit" button will appear.

In Edit Mode, you can click on any "Edit" button and edit the content:

Page Regions: If you are a Content Manager, you can click on the blue "Edit" buttons to edit any Page Region content using the built-in Rich-text Editor. If the Page's Page Type has interactive properties, such as a Custom Form, these properties can also be edited through the blue "Edit" buttons.

Page Comments: If you are a Content Manager, you can click on the blue "Edit" buttons to edit or publish any Comments posted to the Page.

System Regions: If the Page's Page Type is not "Standard", it will possess interactive properties, you can click on the colored "Edit" button to access the specific page type properties:

- Black "Edit" buttons indicate a System Region's header and footer. These header and footer areas are shared among all Page that includes this System Region in their Page Styles.
- Purple "Edit" buttons indicate that the content or feature is custom form related. These areas are linked to the either the custom form or form list / item view that is embedded within the Page.
- Green "Edit" buttons indicate that the content or feature is e-commerce related and are linked to the e-commerce Products and Product Groups so you can edit them directly from any Page they are being displayed on.
- Orange "Edit" buttons indicate that the content or feature is a calendar related and are linked to the calendars

so you can edit them directly from any Page they are being displayed on.

Common Regions & Menus: If you are a Site Manager, then you can click on the red "Edit" buttons to update any Menus and Common Regions using the built-in Rich-text Editor.

Designer Regions: If you are a Site Designer, you can click on the red "Edit" button to update to code within any Designer Region.

Product Group & Products: If you are a Commerce Manager, then you can click on the green "Edit" buttons on any relevant Commerce Pages to edit the Products and Product Groups directly from the Page.

Image Editing with PicMonkey

PicMonkey is a free photo editing service that will allow you to re-size, crop, colorize and clean up your website photos without leaving your websites. To use PicMonkey, be sure you are in Edit Mode, and simply hover over any image in a content area, and click on the "PicMonkey" button that appears over the image. The image must be a GIF, JPEG, or PNG, and you must have edit rights to the image's Folder in order to edit it.

PicMonkey is a Flash application, so be sure you have the proper Flash plug-in installed for your browser. After the PicMonkey application loads, and a copy of your image is sent to the PicMonkey server, you can begin editing your image. If you decide not to keep your changes, you can click the "X" (close), which will cancel your changes and return you to your web page. If you decide to keep your changes, then click "Save", and you will be prompted to either "Replace" the original image on your website, or "Save a Copy" of the image, which will preserve the original image and create a new image and update your web page with the new image name. Be sure not to navigate away from the PicMonkey application screen before you save your changes, or they may be lost.

If you save a GIF in PicMonkey then a new PNG copy will be created and your web page will be updated to use the new PNG. This is necessary because PicMonkey does not currently support saving as a GIF format. Your original GIF image will remain in the system. Therefore, the system will always "Save a Copy" for GIF's regardless of whether you select "Replace" or "Save a Copy".

NOTE: Images that appear in the system content for Form Item View and Form List View Pages can only be replaced. A new copy of these images cannot be saved from PicMonkey. Also, the width and height for the image tag will not be updated. Also, GIF images in Form Item View and Form List View Pages may not be edited with PicMonkey.

DISCLAIMER: Be aware that the basic PicMonkey services are free but their terms are subject to change at any time. We cannot warrant their service, features, advertising, or availability. This service is provided to you AS-IS. Also, when using PicMonkey, a copy of your image is transmitted across the Internet to the PicMonkey server. We cannot encrypt nor maintain Folder security for any image once it has left the website, so please keep this in mind if you are ever editing images that may contain sensitive information.

Full Screen Mode

If you click the "up arrow" button on the top right corner of your Page, the menu will roll up and disappear, allowing you to see your web page exactly as it would appear to site Visitors. Clicking the button again will pull-down the menu again, so you can access other features.

Full Screen Mode works in both Edit and View Modes.

Edit Page Style

If you are a Site Designer, you can click on this button to edit the Page's Page Style, in order to update the layout of the Page and add/remove Regions.

Theme Preview Mode

If you are a Site Manager or a Site Designer, you can click on the "Theme Preview" link, to browse your website using any CSS theme that has been programmed into your website. Theme Preview does not affect any other website Visitor, the previewed Theme is only visible to your computer. Click "Cancel" to cancel Theme preview Mode. The Theme that you preview will also be used by the rich-text editor to determine custom formats and styling.

Edit Page Properties

Click this button to access the Page's properties.

Duplicate Page

To create a new Page, it is faster to duplicate an existing Page. Click this button to make a copy of the current Page. Duplicating a Page also duplicates its properties, and page content. A new name is given to the duplicated Page and you will be directed to the new page. Page Comments are not duplicated.

Create Campaign

Click this button to create an E-mail Campaign using the Page. You must be a Campaign Manager to use this feature.

Creating an Approval Process for Page Updates

Since all Page edits are updated on the website in real-time, there are many times that you wish to make changes and preview them before making them "live" for all to see. In order to do this, we recommend that you follow this process:

1. Duplicate the original Page. The system will instantly create a new copy of the Page with a unique Page name, and redirect you to the new Page.
2. Make changes to the duplicate Page and save and view. Since the new Page is not linked into any of the site menus, then the Page will not be found by any visitor unexpectedly. For added security, you may wish to move the duplicated Page into a Private Folder during the approval process.
3. If the Page needs to be approved by someone else, send them a link to the page. (Be sure they have "read" or "edit" access to the Folder where the duplicated Page is located.)
4. Once the duplicate Page is updated and approved and you are ready to make the Page "live", rename the original Page to a new name, and quickly rename the duplicated Page to the original Page's name. Also, be sure the duplicated Page is in the same Folder as the original Page was in so that it can be accessed by the same audience.
5. If the original Page was linked to any of your Menu Regions, edit the Menus and change the link to point to the new Page (which will have the original page name at this point). That's it. You're done!

Rich-text Editor

You can edit any content area easily using the built-in Rich-text Editor. Much like a Word Processor, the Rich-text Editor Page allows you to add text, images, tables, links, and even embed media files. You can also style your content using Formats and Custom Formats included in System Themes or any CSS design.

Using the Rich-text Editor

To properly apply formatting to your content, select the invisible formatting tags by clicking on the links next to the 'Click tag to format text' (located at the bottom of the window) and then apply a format by selecting the appropriate icon or pick list from the menu (located at the top of the window).

To remove menu options from your content, select the invisible formatting tags by clicking on the links next to the 'Click tag to format text' (located at the bottom of the window) and then either select the "Remove Formatting" icon in the menu.

To remove Formats and Custom Formats from your content, select the invisible formatting tags by clicking on the links next to the 'Click tag to format text' (located at the bottom of the window) and then select the default options of "Format" or "Custom Formats". You may need to repeat this process a few times to remove each layer for formatting.

If you have trouble adding or removing formatting in your content, you can "Select All" content, and then select "Remove Formatting" and "Cleanup" to remove all formatting, leaving only your plain text and graphics. You can then start reapplying your formatting using the "Click tag to format text" to guide you. With a little practice, you will get good at it!

NOTE: The Rich-text Editor takes content that you paste or add into its editing window and creates code behind the scenes that web browsers understand. To do this, it must translate your formatting selections into HTML tags and can sometimes get "confused" when these invisible HTML tags overlap as you paste and update your content. This is not a bug in the software, but simply one invisible format tag interfering with another.

Adding a Line Break

If you want to create a line break (
), press "Shift-Enter".

Adding a new Paragraph

If you want to create a new paragraph (<p>), press "Enter".

Menu Functions

Here is an explanation of all the icon menu functions available to you within the Rich-text Editor. Many of the features are also accessible by placing the cursor at the area in the Editing area that you want to perform an action, and clicking the right mouse button.

Formats

Formats are standardized HTML tags that are used to style content. You typically want to use these first when styling your content. These standard HTML formatting tags include:

- *Paragraph*: apply the paragraph style to any paragraph ("p" tag) that is selected. This will reset the paragraph to its default styling.
- *Preformatted*: apply the preformatted style to the content tags that are selected.
- *Address*: apply the address style to the content tags that are selected.

- *Heading 1:* apply the <h1> heading style to the text selected. This is useful for the largest content heading or title.
- *Heading 2:* apply the <h2> heading style to the text selected. This is useful for the second largest content heading or title.
- *Heading 3:* apply the <h3> heading style to the text selected. This is useful for the third largest content heading or title.
- *Heading 4:* apply the <h4> heading style to the text selected. This is useful for the forth largest content heading or title.
- *Heading 5:* apply the <h5> heading style to the text selected. This is useful for the fifth largest content heading or title.
- *Heading 6:* apply the <h6> heading style to the text selected. This is useful for the sixth largest content heading or title.

Custom Formats

Common Formats are created by all System Themes and help you add more pizazz to your website content by offering custom styling that is consistent with your website's design. By using Custom Formats, your Content Editors can select styling "hooks" created automatically by the Theme Designer (and which can be extended by your Site Designers). Here is a list of the Custom Formats created by all System Themes:

- *background-primary:* apply to the selected HTML element (tag) will set the primary color of the Theme to the background color of the element.
- *background-secondary:* apply to the selected HTML element (tag) will set the secondary color of the Theme to the background color of the element.
- *color-primary:* apply to the selected HTML element (tag) will set the primary color of the Theme to the text color of the element.
- *color-secondary:* apply to the selected HTML element (tag) will set the secondary color of the Theme to the text color of the element.
- *heading-primary:* apply to the selected heading element (<h1>-<h6> tags) can be used to create special primary styling to the heading element.
- *heading-secondary:* apply to the selected heading element (<h1>-<h6> tags) can be used to create special secondary styling to the heading element.
- *image-primary:* apply to the selected image element (tag) can be used to create special primary styling to the image element.
- *image-secondary:* apply the selected image element (tag) can be used to create special secondary styling to the image element.
- *image-left-primary:* apply to the selected image element (tag) can be used to create special primary styling to the image element and float it to the left of any content.
- *image-left-secondary:* apply to the selected image element (tag) can be used to create special secondary styling to the image element and float it to the left of any content.
- *image-right-primary:* apply to the selected image element (tag) can be used to create special primary styling to the image element and float it to the right of any content.

- *image-right-secondary*: apply to the selected image element (tag) can be used to create special secondary styling to the image element and float it to the right of any content.
- *image-desktop-hide*: apply to the selected image (tag) will hide the image from desktop visitors.
- *image-mobile-hide*: apply to the selected image (tag) will hide the image from mobile visitors.
- *link-button-primary-large*: apply to the selected link (<a> tag) can be used to create special primary styling to the link using the large button styling.
- *link-button-primary-small*: apply to the selected link (<a> tag) can be used to create special primary styling to the link using the small button styling.
- *link-button-secondary-large*: apply to the selected link (<a> tag) can be used to create special secondary styling to the link using the large button styling.
- *link-button-secondary-small*: apply to the selected link (<a> tag) can be used to create special secondary styling to the link using the small button styling.
- *link-content-more*: apply to the selected link (<a> tag) can be used to create special styling to lead the reader to the full article or story.
- *link-menu-item*: apply to the selected link (<a> tag) can be used to create vertical menu items within any content region.
- *link-desktop-hide*: apply to the selected link (<a> tag) will hide the link from desktop visitors.
- *link-mobile-hide*: apply to the selected link (<a> tag) will hide the link from mobile visitors.
- *list-accordion*: apply to the selected unordered or ordered list (or tag) can be used to create expanding and collapsing areas of content within any content region.
- *list-accordion-expanded*: apply to the selected list item (tag within an accordion list) can be used to expand the specific accordion list item by default when the page is first loaded.
- *list-tabs*: apply to the selected unordered or ordered list (or tag) can be used to create tabbed content panels within any content region.
- *paragraph-box-primary*: apply to the selected paragraph element (<p> tag) can be used to create special primary box styling to the paragraph.
- *paragraph-box-secondary*: apply the selected paragraph element (<p> tag) can be used to create special secondary box styling to the paragraph.
- *paragraph-box-example*: apply the selected paragraph element (<p> tag) can be used to create special example box styling to the paragraph.
- *paragraph-box-notice*: apply the selected paragraph element (<p> tag) can be used to create special notice box styling to the paragraph.
- *paragraph-box-warning*: apply the selected paragraph element (<p> tag) can be used to create special warning box styling to the paragraph.
- *paragraph-indent*: apply the selected paragraph element (<p> tag) can be used to indent the paragraph.
- *paragraph-desktop-hide*: apply to the selected paragraph (<p> tag) will hide the paragraph from desktop

visitors.

- *paragraph-mobile-hide*: apply to the selected paragraph (<p> tag) will hide the paragraph from mobile visitors.
- *table-primary*: apply to the selected table element (<table> tag) can be used to create special primary styling to the table.
- *table-secondary*: apply the selected table element (<table> tag) can be used to create special secondary styling to the table.
- *table-left*: apply to the selected table element (<table> tag) can be used to create special styling to the table and float it to the left of any content.
- *table-right*: apply to the selected table element (<table> tag) can be used to create special styling to the table and float it to the right of any content.
- *table-center*: apply to the selected table element (<table> tag) can be used to create special styling to the table and float it in the center of any content.
- *table-desktop-hide*: apply to the selected table (<table> tag) will hide the table from desktop visitors.
- *table-mobile-hide*: apply to the selected table (<table> tag) will hide the table from mobile visitors.
- *table-row-header*: apply to the selected table header (<thead> tag) can be used to create special styling to a table's header.
- *table-row-body*: apply to the selected table body (<tbody> tag) can be used to create special styling to a table's body.
- *table-row-footer*: apply to the selected table footer (<tfoot> tag) can be used to create special styling to a table's footer.
- *table-cell-header*: apply to the selected table cell header (<th> tag) can be used to create special styling to a table cell's header.
- *table-cell-data*: apply to the selected table cell data (<td> tag) can be used to create special styling to a table cell's data.
- *table-cell-mobile-fill*: apply to the selected table cell data (<td> tag) is used to force a table cell to the full width of the screen in "mobile mode". This allows tables with a lot of content to "wrap" when viewed on mobile devices. This custom format should be used on the first table cell in the table's first row. All subsequent table cells in the same table row should have the *table-cell-mobile-wrap* custom format in order for all table cells to wrap correctly when viewed on mobile devices.
- *table-cell-mobile-wrap*: apply to the selected table cell data (<td> tag) is used to force a table cell to wrap in "mobile mode". This allows tables with a lot of content to "wrap" when viewed on mobile devices. This custom format should be used on all BUT the first table cell in the table's first row. All subsequent table cells in the table should have the *table-cell-mobile-wrap* custom format too in order for all table cells to wrap correctly when viewed on mobile devices.
- *table-cell-desktop-hide*: apply to the selected table cell (<td> tag) will hide the table cell from desktop visitors.
- *table-cell-mobile-hide*: apply to the selected table cell (<td> tag) will hide the table cell from mobile visitors.
- *text-box-primary*: apply to the selected text (tag) can be used to create special primary box styling to

the text.

- *text-box-secondary*: apply to the selected text (tag) can be used to create special secondary box styling to the text.
- *text-box-example*: apply to the selected text (tag) can be used to create special example box styling to the text.
- *text-box-notice*: apply to the selected text (tag) can be used to create special notice box styling to the text.
- *text-box-warning*: apply to the selected text (tag) can be used to create special warning box styling to the text.
- *text-desktop-hide*: apply to the selected text (tag) will hide the text from desktop visitors.
- *text-mobile-hide*: apply to the selected text (tag) will hide the text from mobile visitors.
- *text-highlighter*: apply to the selected text (tag) can be used to create special highlighter styling to the text.
- *text-fine-print*: apply to the selected text (tag) can be used to create special fine print styling to the text.
- *text-annotate*: apply to the selected text (tag) can be used to create special annotation styling to the text.
- *text-quote*: apply to the selected text (tag) can be used to create special quote styling to the text.
- *video-primary*: apply to the selected video element (<object> tag) can be used to create special primary styling to the video element.
- *video-secondary*: apply the selected video element (<object> tag) can be used to create special secondary styling to the video element.
- *video-left-primary*: apply to the selected video element (<object> tag) can be used to create special primary styling to the video element and float it to the left of any content.
- *video-left-secondary*: apply to the selected video element (<object> tag) can be used to create special secondary styling to the video element and float it to the left of any content.
- *video-right-primary*: apply to the selected video element (<object> tag) can be used to create special primary styling to the video element and float it to the right of any content.
- *video-right-secondary*: apply to the selected video element (<object> tag) can be used to create special secondary styling to the video element and float it to the right of any content.
- *video-desktop-hide*: apply to the selected video (<object> tag) will hide the video from desktop visitors.
- *video-mobile-hide*: apply to the selected video (<object> tag) will hide the video from mobile visitors.

Select text color

Click this icon to change the color of your highlighted text. (This feature can be disabled in the Site Settings.)

Select background color

Click this icon to change the background color of your highlighted text. (This feature can be disabled in the Site Settings.)

Bold

Bold text content that is highlighted.

Italics

Italicize text content that is highlighted.

Underline

Underline text content that is highlighted.

Strikethrough

Strikethrough text content that is highlighted.

Blockquote

Apply the blockquote formatting tag to the highlighted text.

Spell Check

Spell Check the text content using the spell checker enabled for your site.

Cut

Cut content that is highlighted.

Copy

Copy content that is highlighted.

Paste

Paste content from the clipboard

Paste Text

Paste only text content from the clipboard.

Paste Word

Paste from a Microsoft Office document in the clipboard and strip out hidden MS Word formatting tags.

Select All

Click this icon to select all content (and invisible formatting tags) within the Editor Window. This is useful if you want to copy everything in the Editor to your clipboard and then paste it into another editable area.

New Document

Click this icon will clear all the content within the Editor Window. This is useful if you want to clear all the content in the Editor and start over. It will also clear any invisible formatting tags that might be present.

Subscript

Subscript text content that is highlighted.

Superscript

Superscript text content that is highlighted.

Justify Left

Justify all content to the left of the editable area.

Justify Center

Justify all content to the center of the editable area.

Justify Right

Justify all content to the right of the editable area.

Justify All

Justify all content to the left and the right of the editable area.

Create Bulleted List

Creates a regular bullet list.

Create Numbered List

Allows you to create a list ordered by numbers.

Indent

Indent the content.

Horizontal Rule

Adds a horizontal separator line beneath your content. TIP: This is a good way to create separation between areas of content.

Add Link

This button allows you to create a HTML link to any other Web page in the system or to an external Website. You can also upload a document file using this button and the system will automatically create a link to the File.

To create a link to an email address, select the link button but instead of selecting a Page or URL, enter "<mailto:example@example.com>" in the URL field. Email links will automatically be protected from email harvesters, which are bots that crawl the web and collect email addresses for spam. The email link that you create will be converted to JavaScript automatically when a Visitor visits a Page. This prevents email harvesters from finding the email address. An email address must be linked with a mailto link in order for the email address to be protected. An email address which just appears in content, without a link, will not be protected. Email links which are entered through other areas of the system (e.g. Custom Page Styles, Designer Regions) will also be protected.

You may use the Popup tab to create a JavaScript popup window. You might want to use this feature instead of simply opening a new window via the Target field if you want to set the properties for the new window (e.g. size, scrollbars). Please do not enter a Window name, unless you are specifically directing the link to an existing popup window, because it might not work in Internet Explorer.

Remove Link

Removes the HTML link from the content.

Create Anchor

Create an link to an area within the Page. This is useful when you need to help the site visitor navigate around a large page of content.

Insert Image

This button allows you to insert a graphic image into your content. You can select any file already uploaded (see the Files Tab for more information on these Files) or upload a new image file from your computer. All uploads are available on any other page you create. Valid image files will have a .tiff, .png, .jpg, or .gif extension to be visible on your Website. .jpg are best for photos, and .gif is best for simple logos.

Insert Media

This button allows you to insert a flash, shockwave, quicktime, windows media, or realtime media file into your Page Region. You can select any file already uploaded (see the Files Tab for more information on these Files) or upload a new media file from your computer. All uploads are available on any other page you create.

NOTE: If you are having problems rendering your embedded media, edit the media's Properties and use the actual URL (e.g. `/[dir]/get_file.php?name=example.wmv`) instead of the virtual URL (e.g. `/files/example.wmv`). We are not sure why the rewriting of the URLs matters, but it appears that a small percentage of client computers don't like the virtual URLs, probably because of some unrelated compatibility issue that has not been indentified.

If that does not work, you should also consider adding a URL parameter to your media's Properties as follows, since there seems to be an issue for some versions of the Internet Explorer browser:

```
<object>...<param name="url" value="/files/example.wmv" />...</object>
```

Be sure to also replace the virtual URL with the actual URL as described above.

Table Properties

You can edit several of the tables properties including alignment, size, rules, borders and specific styles. This is an advanced feature. You can learn more about tables at:

Row Properties

Change one row including size, alignment and different styles.

Cell Properties

Changes a specific cell's size, alignment, or you can add styles.

Cell Merge

Allows you to put content in multiple cells. For instance if you have a header that you need to center over three columns, you would merge the three cells together.

Table Modifications

You can insert and delete columns, rows or cells.

Insert Table

Using the insert table button you can choose the number of rows and columns and the width of the table. You can also configure a default alignment, border, cell spacing and cell padding.

Insert Character

Insert special characters into the content that are not typically available on standard keyboards.

Remove Formatting

Highlight or select the content area you wish to clean, and click the Format Scrubber menu button. This button removes any text formatting (in case you need to clean the text and reapply your formatting). Very useful when copying and pasting content from other Websites.

Cleanup

Highlight the content area you wish to clean, and click the MS Word Format Scrubber menu button. Microsoft Office applications such as Word and Excel add HTML formatting tags (you can see them in the content) that mess up the formatting of Pages. This button removes these formatting tags.

Search

Search the content for a keyword.

Search and Replace

Search the content for a keyword and then replace it with another.

Undo

Undo the last modification within the Window. NOTE: Once you "Save" the content, the content changes cannot be undone.

Redo

Redo the last Undo within the Window. NOTE: Once you "Save" the content, the content changes cannot be redone.

Full Screen Mode

Enlarge/reduce the Rich-text Editing area to fill the browser window.

HTML Code View Mode

View the HTML code that is producing the Page Region. TIP: If you have basic knowledge of HTML, you will find this mode useful to add and modify more complex HTML tags.

Adding Custom Code

The primary function of the Rich-text Editor is to contain content (text and graphics) and hyperlinks, but most javascript and even iframes are allowed by the Rich-text Editor. However, to prevent you website from being hacked, other code is not allowed and will be removed automatically when the Rich-text Editor is closed and saves content. If you are curious as to what code is allowed, we recommend you test this by adding your code and saving. Then reopen the Rich-text Editor and inspect your code to see if it remained intact.

Also, you cannot run PHP code from within the Rich-text Editor, nor can you embed other system tags or regions within the Rich-text Editor.

Creating Dialog Windows

You can create dialog windows that pop up and float on top of your pages. This allows you to add content to a page without sacrificing screen real estate.

To create a dialog window, first, insert a link and then enter a Link URL or select a Page or File for the content that you want to appear in the dialog window. This is a fall-back link in case the Visitor does not have JavaScript enabled. This is important for search engine optimization. If you do not care about a fall-back link, then you may enter "#" for the Link URL. Second, add the following code to the onclick field under the Events tab.

```
software.open_dialog({url: '{path}pages/example?edit=no', width: 700, height: 600, modal: true, title: 'Title Goes Here'}); return false;
```

Where:

url: should be set to something like {path}pages/example or http://www.example.com. (Please note that you should actually enter "{path}". The software will replace it with the correct path automatically, so we recommend that you don't enter your actual path.) The ?edit=no parameter on the end of the url is optional, and will prevent the control panel itself from being displayed inside the dialog window when it is opened (if a Site Editor is logged in when viewing the dialog window.)

width: width of the dialog window. You may omit this property in order to use the default value, which is 75% of the browser width. Also, this property will be ignored and the default value will always be used when a Visitor is in mobile mode.

height: height of the dialog window. You may omit this property in order to use the default value, which is 75% of the browser height. Also, this property will be ignored and the default value will always be used when a Visitor is in mobile mode.

modal: A value of "true" will shade the rest of the screen behind the modal window and prevent the Visitor from interacting with the rest of the screen while the dialog window is open. You may enter "false" for a standard dialog window. The default is "true".

title: The title to be displayed in the title bar at the top of the dialog window. This is blank by default.

return false; Be sure to include this at the end so the browser will understand that a dialog window is being opened for the link, and that the link should not be opened in the parent window.

Optimize Content

SEO Optimizer

Search engine optimization (SEO) is the practice of improving the traffic to a website from the organic or natural results of a search engine. SEO practices do not attempt to trick search engines. On the contrary, the goal of SEO is to provide information-rich content in a way that is naturally weighted by the search engines because it follows the "rules" used by all the major search engines.

The SEO Optimizer is a fee-based upgrade service that will help you to follow these rules for optimizing content according to current SEO best practices. The SEO Optimizer analyzes your content using the latest search engine rules, and provides you with a score along with specific recommendations for improvement. For a demonstration of the SEO Optimizer, watch the tutorial video. To add the SEO Optimizer to your website, contact your website administrator.

The key to writing content that is search engine optimized is to focus on a primary topic for the page. This will be your Primary Keyword or Keyword Phrase and should be the central theme for the content of the page. The more closely your page content is related to the Primary Keywords, the more "understood" your content will be by the search engines, and the better your page will be ranked in relevant search results.

Title

When writing the title for the content, the SEO Optimizer will help you too:

- Determine the best number of characters for your title, increasing the likelihood of a click-through.
- Determine the best number of words to include in your title.
- Show you how to display your keyword phrase in the title to increase the relevancy of your content for that keyword phrase, and increase the likelihood of a click-through.
- Where to add your Primary Keyword to increase the relevancy of the keyword within the search engines' indexes.

Description

The description will generally be the summary or "snippet" copy for the search result. When writing the description for the content, the SEO Optimizer will help you too:

- Determine the best length of the description to ensure the full description is visible in a search result.
- Show you how to place your keyword phrase in the description. This will increase the relevancy of your content for that keyword phrase, and increase the relevancy of the keyword within the search engines' indexes.

Tags

Tags are keywords that are used to build Tag Clouds within your website pages. These tags are not heavily considered by the SEO Optimizer, but they can indirectly improve your search engine results by exposing relevant keywords and navigation to related pages that the search engines might not otherwise find. For more information about adding Tag Clouds to your website pages, see Page Styles.

Body

When writing content for the body, the SEO Optimizer will help you too:

- Determine the best length of the body content.
- Determine the proper keyword density so each keyword or keyword phrase does not represent too much of the total words on the page. Otherwise, the search engine may consider the page to be using keyword stuffing.
- Determine how to apply additional emphasis to your keyword phrase.
- Determine the density and distribution of hyperlinks within the body content. This will also ensure that you are not "spamming" or "keyword stuffing" your content with links to the same web page too many times which will adversely affect your search engine ranking.
- How to place hyperlinks in the body in order to show prominence.

Understanding Your SEO Score

After the SEO Optimizer analyzes your content, you will receive an SEO Score, and specific recommendations to improve that score. You should continue to revise your content until the score is at least 74%. A score of up to 100% is possible, but should not be your primary goal. Remember, your content must be readable by humans too, so don't get caught up in trying to achieve a perfect score at the expense of readability.

The following is a list of the main SEO checks performed, and what they mean:

Flesch Reading Ease Score – one of the best-known and most popular readability indicators. The formula rates text on a 100-point scale based on the average number of syllables per word and words per sentence. The closer the score is to 100, the easier the content is to read; the closer the score to 0, the more difficult the content is to read. In general, a score below 30 is considered very difficult, and a score of 70 is estimated to be written at the eighth or ninth grade level. Research has indicated that a score of 70 is likely appropriate for adult readers. A score of 100 represents that the content is understood by readers with at least a fourth grade education.

Flesch Reading Ease Table					
Style	Flesch Reading Ease Score	Average Sentence Length in Words	Average Syllables per 100 Words	Estimated School Grade Completed	Estimated Percent of U.S. Adults
Very Easy	90-100	8 or fewer	123 or fewer	4th Grade	93
Easy	80-90	11	131	5th Grade	91
Fairly Easy	70-80	14	139	6th Grade	88
Standard	60-70	17	147	7th or 8th Grades	83
Fairly Difficult	50-60	21	155	Some High School	54
Difficult	30-50	25	167	High School or Some College	33
Very Difficult	0-30	29 or more	192 or more	College	4.5

Adapted from Flesch, R. (1949). *The art of readable writing*. New York: Harper. p.149.

Keyword - a word (or combination of words) that describes the topic or subject of a piece of content. It is also a word or combination of words that are used in a search engine to search for a topic or subject.

Primary Keyword - a term developed by SEO experts to designate the keyword(s) or keyword phrase(s) in a piece of content that are most likely to result in an organic search listing based on Scribe's analysis of the content and the keyword usage.

Keyword Analysis - a proprietary process utilized by SEO experts to determine the keyword(s) or keyword phrase(s) in a piece of content based on popular search terms. It includes a report on the rank, prominence, frequency, and density of the keyword(s)/keyword phrase(s), and provides related terms.

Related Keyword Tag - words or combinations of words added to a piece of content that describe the main topic(s) or subject(s) of a piece of content.

Keyword Rank - a proprietary algorithm developed by SEO experts that determines the value of keyword(s) or keyword phrase(s) in relationship to a piece of content and to each other. Keywords are ranked in descending order of importance as either Primary, Important, Significant, or Not Emphasized.

Keyword Density - the number of times a keyword or keyword phrase appears in a particular piece of content in relation to the total number of words in the content. It is usually represented as a percentage; the higher the number, the greater the density. Current SEO best practices suggest that a keyword's density be less than 5.5% for one piece of content.

Keyword Frequency - the number of times a keyword or keyword phrase appears in a particular piece of content. It is usually represented as a whole number; the higher the number, the greater the keyword frequency.

Keyword Prominence - a proprietary formula developed by SEO experts that determines the value of a keyword or keyword phrase based on its relative placement within a particular piece of content. Prominence is rated as either Very Low, Low, Medium, High or Very High. The higher the prominence, the more favorable the keyword/keyword phrase is presumed to be weighted in the content by the search engine algorithm. You should strive to achieve a Prominence rating of high or very high for your Primary Keyword/Keyword phrase for a page. However, all Keywords/Keyword phrases on a single page should not have a high or very high prominence rating to minimize the chance that search engines will consider you guilty of Keyword stuffing or spamming.

Keyword Research - the act of exploring keywords. The process frequently involves reviewing search volumes of targeted keywords and alternative keywords to determine which keywords to include in content.

Keyword Stuffing (or keyword spamming) - adding an excessive number of keywords or keyword phrases to a web page or repeating a keyword or keyword phrase excessively on one page in place of relevant content. It is typically a technique used by those trying to "trick" the search engines into ranking a website in organic searches.

Trend - the approximate search volume of a keyword or keyword phrase over the past 12 months. Trend is helpful to identify seasonality of keywords that may have a low volume but are on the rise.

SERP (Search Engine Results Page) - the web page(s) containing hyperlinks to related content provided by a search engine in response to a search query. Usually, the results page returns both paid ads (sponsored links) and organic listings.

SEO (Search Engine Optimization) - the practice of improving the traffic to a website from the organic or natural results of a search engine.

SEO Best Practices (white hat SEO) - utilizing search engine optimization (SEO) techniques that align with the guidelines of the search engines' ranking algorithms without the use of trickery. Examples of trickery include using hidden text, duplicating content, link farming and keyword spamming, to name a few.

Edit Comment

This screen allows a comment to be edited, deleted, or published by the Page's Moderator at any time.

Contributor

Display
Name:

This is the name entered by the Contributor who added the Comment. If this field is left blank then "Anonymous" will be displayed.

NOTE: The true identity of the Contributor, if known, is displayed in the Navigation bar if verification is required.

Comment

This is the text of the Comment entered by the Contributor.

Comment:

If there is an Attachment, then the Attachment will be listed below the Comment field. You may delete the Attachment by checking the Delete Attachment check box and then clicking Save.

Publish Comment

Publish:

Check this box to make the Display Name and Comment visible to all Visitors to the Page.

NOTE: Only Content Managers with edit rights to the Page can see unpublished Comments.

Highlight Featured Comment

Check this box to include this Comment in the list of Featured Comments. You might want to use this feature once a Page/Item collects too many comments and you want to collapse most of them so that the Add Comment form is more obvious and easier to navigate too. This feature is also great for product reviews where you want to highlight the best reviews (comments) on your Page/Item.

Featured:

To enable Featured Comments, select at least one Comment to be featured and save the Comment. Once enabled, only Featured Comments will be displayed by default when a Visitor browses to the Page/Item. They can toggle between the Comments displayed by selecting "Show All" or "Show Featured".

Edit Page Properties

This screen displays the Page Properties which define the name of the Page and the interactive features of the Page.

NOTE: If you are creating a new Page, only the basic Page Properties are required. All other Page Properties are hidden, but are visible once the Page has been created.

Page Name

The name of this Page (no spaces please). This value will be used to identify the page on your Web server. This value must be unique among all website Pages.

Page Name:

NOTE: Menus are linked to Pages by the Page's name, so be sure to update any Menu Items that might be linked to the Page if you change the Page's name.

Page Access Control, Design, and Common Content

Folder:

This is the Folder that the page will be located in. The Folder determines the "view" and "edit" access to the Page.

Override Folder's Default Page Styles

Select "Default" to inherit the value from this Page's Parent Folder. Otherwise, select one of the Desktop Page Styles that have been created by the Site Designers.

Desktop Page Style:

NOTE: Desktop Page Styles are any System Page Style that is NOT a "Mobile One Column" Page Style (or a Custom Page Style that does not have `one_column_mobile` CSS class assigned to its HTML `<body>` tag.)

Select "Default" to inherit the value from this Page's Parent Folder. Otherwise, select one of the Mobile Page Styles that have been created by the Site Designers.

Mobile Page Style:

NOTE: Mobile Page Styles are any System Page Style that is a "Mobile One Column" Page Style (or a Custom Page Style that has `one_column_mobile` CSS class assigned to its HTML `<body>` tag.)

Interactive Page Feature

A Page's interactive features are determined by its "Page Type". Page Types turn simple web pages into data-driven pages like an order form page, custom form page, login page, my account page, shopping cart page, member directory, etc.

By linking Pages with different Page Types together, you can create customized website applications without any programming knowledge. Keep in mind that some Page Types are designed to be chained to other, specific Page Types.

Once you select a Page Type, the Page Type Properties will be visible. Here are the available Page Types you can select from:

** = Page Types for Manager and above.*

Standard

Standard: This Page displays simple content and has no interactive features.

Miscellaneous

Change Password *: This Page will be displayed automatically when a User attempts to change their password.

Change Random Password *: This Page will be displayed automatically when a User logs in in for the first time using a temporary password, requesting them to enter their own password.

E-Mail a Friend: This Page displays a form for the Visitor so he/she can e-mail a link to a friend. All Visitors, except Users with edit rights to the page, are limited, by IP address, to 10 e-mails per day in order to prevent spam.

Error *: This Page will be displayed automatically if a Page or File is requested from the website and cannot be found.

Folder View: This Page displays Folders, Pages (which are included in site search), and Files that are located in the same Folder as the Folder View Page.

Forget Password *: This Page allows a site Visitor to request their password be reset and a temporary password sent to their User account's email address. *This feature must be enabled in Settings for a link to this Page to appear on the Login Page.*

Login *: This Page will be displayed automatically if a Page or File is requested from the website and the Visitor does not have access to it (because they haven't logged in yet, for example).

Logout *: This Page will be displayed automatically when the User logs out of the website.

Page Type:

Photo Gallery: This Page displays all "Albums" and "Photos" located in the same Folder as the Photo Gallery Page.

Search Results *: This Page will be displayed automatically when the Site Search feature is accessed.

Registration

Registration Entrance *: This Page will be displayed automatically when a Visitor attempts to access a Page or File in a Guest or Registration Folder.

Spammers use unprotected site registration forms in an attempt to use another's website to post and broadcast their own advertising. To combat this malicious technique, if CAPTCHA is enabled in the Site Settings, a simple challenge question is asked that visitor must answer correctly in order to submit the Registration Entrance Page.

Registration Confirmation *: This Page will be displayed automatically when a Visitor successfully registers on the website. It will then direct the Registered User to their previously requested Page or File. This Page will also be emailed to the Registration E-mail Address in the Site Settings so that someone on your staff can be alerted about the registration.

Membership

Membership Entrance *: This Page will be displayed automatically when a Visitor attempts to access a Page or File in a Membership Folder.

Membership Confirmation *: This Page will be displayed automatically when a Visitor successfully registers as a Member on the website. It will then direct the Member User to their previously requested Page or File. This Page will also be emailed to the Membership E-mail Address in the Site Settings so that someone on your staff can be alerted about the new Member.

My Account

My Account *: This Page displays the User's Personal Contact Information and links to the other account pages: My Account Profile, Email Preferences, View Orders, and Change Password. If any commerce features have been used, any Saved Carts, Order History, and Shipping Address Book is displayed. If they are an Affiliate, then their Affiliate commissions will be displayed. If they are a Member, then their Member ID and Expiration Date will be displayed.

My Account Profile *: This Page allows the User to update their personal contact & billing Information, and change their account password.

E-Mail Preferences *: This Page allows the User (or Subscriber) to update their e-mail address, and any e-mail subscriptions they have access to receive.

View Order *: This Page displays a previously submitted Order, and offers the User the opportunity to reorder (fill their Cart with it's items).

Update Address Book *: This Page allows the User to update the shipping addresses captured during previous checkout sessions.

Forms

Custom Form: This Page will allow you to create your own custom form to collect data from site Visitors.

Custom Form Confirmation: This Page provides a way to display a newly submitted form's data to the Submitter as a receipt confirmation, along with a time and date stamp and a unique reference code.

Form List View: This Page displays filtered rows of submitted form data collected from a Custom Form. It can optionally link each row to a Form Item View.

Form Item View: This Page displays a a single submitted form and must be linked to from a Form List View.

Form View Directory: This Page allows you to see information about multiple Form List Views on one Page (e.g. most recent, most viewed, most active, number of comments, number of views).

Calendars

Calendar View: This Page displays one or more calendars. It can optionally link it's Events to a Calendar Event View.

Calendar Event View: This Page displays the details of a Calendar Event and must be linked to from a Calendar View.

E-Commerce

Catalog: This Page displays thumbnails of product categories and allows Visitors to "drill down" into unlimited Product Groups, without leaving the Page.

Catalog Detail: This Page displays photos, information, pricing, and the "add to order/cart" features for any Product referenced by a Catalog Page.

Express Order: This Page combines the functionality of the traditional checkout process (Shopping Cart Page > Billing Information Page > Order Preview Page) into a single Page, so you can offer fast, one-step checkouts.

Order Form: This Page displays a group of Products in a few different ways and the "add to order/cart" features.

Shopping Cart: This Page displays all the Products and recipients in their Cart, calculates any discounts, displays subtotals, and allows the Customer to update their items, enter an offer code, or checkout.

Shipping Address & Arrival: This Page collects shipping addresses and optional arrival dates for each recipient.

Shipping Method: This Page displays the available shipping options and their fees to the Customer for each recipient.

Billing Information: This Page collects the Customer's billing information for the Order.

Order Preview: This Page displays the order details and totals, and collects the payment method from the Customer. It also provides the "purchase" button to finalize and complete the Order.

Order Receipt: This Page displays the successful acceptance of the Order, and shows all the Order details, time and date stamp, and the unique order number. This Page can be e-mailed to the Customer and optionally to any other person on your staff.

Affiliate Program

Affiliate Sign Up Form *: This Page collects all necessary information to process an Affiliate sales representative for your website.

Affiliate Sign Up Confirmation *: This Page is displayed when the Affiliate Sign Up Form is submitted and provides a receipt confirmation for the Affiliate.

Affiliate Welcome *: This Page will be e-mailed automatically to the Affiliate once they have been approved. It contains a self-generated tracking code that will track all

on-line sales and commissions for the Affiliate.

NOTE: Changing a Page Type after the Page has been created is non-destructive, meaning you will not lose any data if you change the Page Type, and you can always change the Page Type back without any problems.

Site Search Feature

Select this option to include this Page in the Search Results Page when the built-in Site Search feature is used.

Include in Site Search:

Site Search is smart. Only search results from Pages that the searcher has access to view will be displayed in the results, so it is safe to enable this feature for Membership and Private Pages.

Select this option to promote this Page to the top of the Search Results Page.

Promote on Keyword:

TIP: This is a good way to create site keywords that your Visitors can recall from your promotional materials and quickly find a Page on your site.

Home Page Feature

Home Page:

Checking this box will make this Page rotate randomly with any other Page marked as a "Home Page" whenever a visitor enters the top level of your domain name (<http://www.mydomain.com>).

Search Engine Optimization

These properties help search engines (e.g. Google, Bing, Yahoo!) crawl your website and promote your Pages in their results. This leads to more traffic to your Website.

The Title, Description, and Keywords fields add text to the Visitor's browser title bar and search engine meta tags to the Page when it is displayed.

The Title and Description fields are also used by the Site Search feature and displayed on Search Results Page.

The Title is used as the e-mail Subject field when the auto-responder feature is used to send the Page after an action has occurred.

Page Title. This is what is displayed at the top of the Visitor's browser window when they access this Page.

Web Browser Title:

NOTE: If you leave this field blank, the website defaults found in Site Settings will be used.

This is the short description of the Page. This is what you typically see in the Search Engine results on the major search engines.

Web Browser Description:

NOTE: If you leave this field blank, the website defaults found in Site Settings will be used.

Enter the keywords that will be found in the content of this Page. The search engines will attempt to match these keywords with their visitor's searches. Separate each keyword with a comma.

Web Browser Keywords:

If you leave this field blank, the website defaults found in Site Settings will be used.

NOTE: If "Include in Site Search" is enabled, then these keywords will be added to all relevant Tag Clouds, and these keywords will be searched along with the Page Region content of this Page in the Site Search.

Select this option in order to include this Page in the sitemap.xml file. The sitemap.xml file is used in order to tell search engines about content at your website

so that Visitors can find your website.

The Pages's Folder must have a Public Access Control Type and not be archived in order for the Page to appear in the sitemap.xml file. Also the Page must have one of the following Page Types: Standard, Folder View, Photo Gallery, Search Results, Custom Form, Form List View, Form Item View, Form View Directory, Calendar View, Calendar Event View, Catalog, Catalog Detail, Express Order, Order Form, or Shopping Cart.

This feature offers the following advantages.

- This system will automatically notify all major search engines (i.e. Google, Bing/Yahoo!, Ask.com) daily if the sitemap.xml file has changed. This means that Visitors from search engines will find new content at your website sooner. This also means that you do not have to manually submit your website to search engines or wait for other sites to link to your website in order for search engines to find it.
- Sometimes search engines are not able to find all URL's at a website. This might be because content is linked in JavaScript or Flash or there might be an area of content that is not linked on the website. The sitemap.xml file ensures that search engines know about every URL at your website.
- The sitemap.xml file contains information about when an item was last modified so search engines don't have to crawl URL's that have not changed, so this saves bandwidth and improves site performance.
- The sitemap.xml file contains priority information in order to give the home page(s) the highest priority. This means that search engines can make sure to crawl your home page first in case they are too busy to crawl your whole website at the moment.
- For Catalog, Form List View, and Calendar View Pages, all items that appear through those Pages will also be included in the sitemap.xml file. For example, if a Product appears on a Catalog Page, then a URL to the Catalog Detail Page for that Product will be included in the sitemap.xml file. This means that search engines will be able to find all items that appear on your website (i.e. Product Groups, Products, Submitted Forms, Calendar Events).
- This system has a robots.txt file which tells search engines where the sitemap.xml file is located in order to make sure that all search engines can find the sitemap.xml file.

Include in sitemap.xml:

NOTES:

- The sitemap.xml file should include every Page at your website that you want search engines to know about, not just the most important Pages. Normally, all public Pages should be included. However, if you happen to have public Pages that you only want to share with a few people, then do not include those Pages.
- Search engines are only notified if there is at least one Page included in the sitemap.xml file, in case you do not want search engines to know about your website.
- Files are not currently included in the sitemap.xml file (only Pages).
- The sitemap.xml file may be accessed at the following location:

<http://www.example.com/sitemap.xml>

Comments Feature

The Comments feature adds online community-building functionality to any Page on your site. Comments allow Visitors and Users to interact with your site. If Comments are enabled for a Page, then anyone who can view a Page can leave a Comment (and

therefore become a Contributor), and read any published Comments from other Contributors. Comments can be automatically published, or the Page's Moderator (a User with edit rights to the Page), can be alerted via e-mail to new Comments with a link to instantly edit, delete or publish the Comment.

NOTE: Comments are tied directly to a Page. However, some Pages, depending on their Page Type, display dynamic items, so their Comments are tied to both the Page and the dynamic item. This is transparent to the Visitors, but worth mentioning as you are deciding which Pages you should enable Comments for. Pages with the following Page Types display dynamic items: Catalog, Catalog Detail, Form Item View, and Calendar Event View.

NOTE: If CAPTCHA is enabled in the Site Settings and if a visitor is not logged in and the Page has either a Public or Guest Access Control Type, then a Captcha field will automatically be displayed in the Add Comment area of the Page. The Captcha field is a randomly generated question that must be answered before the Comment can be added. This is to protect the Comments feature from being spammed.

IMPORTANT: To display comments, a System Region or `<system></system>` tag must appear in the Page Style assigned to the Page. The Site Designer can add this tag if necessary.

Enable Comments:

Selecting this box will allow Contributors to add Comments to the Page. Comments are disabled by default.

Check this box to allow Visitors to add new comments. When the box is unchecked, the add Comment form and Watcher area no longer appear, however the list of Comments is still shown.

Allow New Comments:

An "Allow New Comments" or "Do Not Allow New Comments" button is also displayed near the add Comment form, which allows you to control this same setting. If this is a Page that displays dynamic items (e.g. Form Item View), then the Allow/Do Not Allow new Comments button only applies to the current dynamic item that you are viewing. For example, when using this feature on a Form Item View you are only allowing or not allowing new Comments for that specific Submitted Form. For Pages that show dynamic items, this checkbox will only be used as the default setting for all dynamic items.

Do Not Allow New Comments Message:

This is the message that will appear to Visitors if new Comments are no longer allowed. You may leave this field blank if you do not want a message to appear.

Automatically Publish Comments:

Check this box to automatically publish Comments instantly as soon as they are added by Contributors. Leave this box unselected if you would like the Comment to be unpublished until the Moderator has approved it.

Allow User to Select Name:

Check this box to allow Users to select the name that they want to appear next to "Added by". This feature encourages more participation from your user community by giving them a choice as to how their identity appears to all. If this check box is checked then the User may select from: 1) username, 2) first name, 3) first name, last initial, 4) first initial, last name, 5) first initial, last initial, 6) full name, or 7) Anonymous. If this setting is unchecked, then the username will always be displayed next to the comment.

This setting does not apply to Visitors who are not logged in and does not apply to Users who have edit rights to this Page. These types of Visitors and Users are allowed to enter a name or remain anonymous.

Require Login to Comment:

Check this box to require that Visitors login or register before they add a Comment.

Check this box to allow Visitors to upload Attachments when adding Comments. For example, a Visitor might want to upload a picture or a PDF with a Comment in order

Allow File Attachments:	<p>to share more information. When a Comment has been added with an Attachment, then the Attachment will appear as a link below the Comment, along with the file size. An Attachment will be deleted automatically when its Comment or its Comment's Page is deleted. Attachments can be found easily via My Attachments in the Files tab.</p>
Show Submitted Date & Time:	<p>Check this box to show the date & time that a Comment was added next to each Comment (e.g. Saturday, January 1, 2011 at 12:00 AM).</p> <p>TIP: If you are using Comments for Product reviews then you might want to uncheck this box because the reviews might appear dated over time.</p>
E-mail moderator when a comment is added:	<p>Select this box to send an e-mail notification to the Page's Moderator (below). The Moderator will then be able to edit, delete, or publish the Comment.</p> <p>NOTE: Moderators must have edit rights to the Page. Also, the Moderator will not receive an email notice if the Comment is submitted by an Administrator, Designer, or Manager User (since these Users can approve their own comments so a Moderator is unnecessary).</p>
To E-mail Address:	<p>Enter a valid e-mail address for the Moderator that will manage the Comments for this Page.</p> <p>This is the subject line of the e-mail. A default subject will be used if the subject is blank.</p> <p>TIP: For Custom Form Pages and Form Item View Pages, you may also include the name of any custom field in the associated Custom Form to create a dynamic subject that contains submitted form data. Example: You received a message from <code>^^name^^</code>. You can also use the following format to include different content depending on whether there is a value for a custom form field or not:</p>
Subject:	<p><code>[[His name is ^^name^^ He did not include his name.]]</code></p> <p>You can use the following format to customize the date format for date and date & time fields. The format must be a PHP date format.</p> <p>Format: <code>^^field_name^^%%format%%</code></p> <p>Example: <code>^^submitted_date_and_time^^%%l, F j, Y \a\t g:i A%%</code></p>
Also send e-mail to custom form conditional administrators:	<p><i>This feature only applies to Form Item View Pages.</i> Check this box if you want to use the same conditional e-mail notification of administrators to occur that were notified initially when this Page's Custom Form was submitted. Since some Custom Form fields can notify different administrators (or conditional administrators), you may want the same administrators notified when new Comments are added.</p> <p>TIP: This feature is useful when you want to set up a single Custom Form to manage requests for several internal groups. Each time a Comment (i.e. response) is added to the Custom Form Item View Page, only the proper group selected in original Submitted Form would be notified.</p>
E-mail custom form submitter when a	<p><i>This feature only applies to Form Item View Pages.</i> Whenever a Comment is published this will send the original Custom Form submitter a notification e-mail informing him/her that a new Comment has been published to his/her Submitted Form. In order for this feature to work, there must be a field on the Custom Form where the Connect to Contact property is set to E-mail Address. That allows this feature to figure out the Custom Form submitter's e-mail address.</p>

comment is published: TIP: This feature is useful for a support ticket system where the person who originally submitted the ticket (i.e. submitted form) needs to be notified when someone replies to their ticket (i.e. adds a Comment).

NOTE: The "From" address for this e-mail notification will be set to the From E-mail Address page type property for the Custom Form. If that field has no value, then the Support E-mail Address from the Site Settings will be used.

This is the page that will be sent to the Custom Form Submitter.

Page: NOTE: This feature requires that a System Region or a <system>Page</system> tag appear in the Page Style for the selected Page. The Site Designer can add the tag if necessary.

This is the subject line of the e-mail.

TIP: You may also include the name of any custom field in the associated Custom Form to create a dynamic subject that contains submitted form data. Example: You received a message from `^name^`. You can also use the following format to include different content depending on whether there is a value for a custom form field or not:

[[His name is `^name^`||He did not include his name.]]

Subject:

You can use the following format to customize the date format for date and date & time fields. The format must be a [PHP date format](#).

Format:

`^^field_name^^%%format%%`

Example:

`^^submitted_date_and_time^^%%l, F j, Y \a\t g:i A%%`

E-mail watchers when a comment is published:

When a Page is selected (below), Users will be allowed to add themselves to the Watcher List for this Page, so that they will be notified via e-mail when a Comment is published. This feature allows Watchers to easily track conversations for certain submitted forms. A Visitor must be logged in as a User in order to add or remove themselves from the Watch List (through a Form Item View Page).

NOTE: The "From" address for this e-mail notification will be set to the Support E-mail Address from the Site Settings.

This is the page that will be sent to the Watchers.

Page: NOTE: This feature requires that a System Region or a <system>Page</system> tag appear in the Page Style for the selected Page. The Site Designer can add the tag if necessary.

This is the subject line of the e-mail.

Subject: TIP: For Form Item View Pages, you may also include the name of any custom field in the associated Custom Form to create a dynamic subject that contains submitted form data. Example: `^subject^`: A comment has been added. You can also use the following format to include different content depending on whether there is a value for a custom form field or not:

[[Subject is `^subject^`||There is no subject]]

You can use the following format to customize the date format for date and date & time fields. The format must be a [PHP date format](#).

Format:
^^field_name^^%%format%%

Example:
^^submitted_date_and_time^^%%l, F j, Y \a\t g:i A%%

Check this box to allow each custom form Submitter to add/remove Watchers from their submitted forms (through a Form Item View Page).

Allow submitter to
manage watchers:

NOTE: This feature is only enabled if "E-mail watchers when a comment is published:" is also enabled (see above).

Deleting a Page

When a Page is deleted, a warning message is displayed, and if "Continue" is selected, the Page, its Page Region content, and all of its Comments will be deleted from the system's database.

TIP: If you might want to archive the Page Region content, we recommend that you place the Page in a Private Folder (so no one can view or edit it) instead of deleting it.

NOTE: When a Page is deleted, only the Page Regions and Comments are deleted. Any Common Regions, Page Style, Page Type, etc., are NOT deleted. The Page, its Page Regions, and its Comments are gone!

NOTE: The delete button only appears for Users that have access to delete Pages.

WARNING: Be careful because there is no undelete!

Folder View Page Type

The Folder View Page will list Folders, Pages (which are included in site search), and Files that are inside of the same Folder as the Folder View Page and that the Visitor has access to. This Page Type is useful when you want to give your Visitors or Users a dynamic list of the content that they have access to. For example, you might want to use this Page Type for an intranet that shows private Pages that a User has access to.

Here are the Page Type Properties available to this Page Type:

- | | |
|----------------|---|
| Include Pages: | Check this in order to include Pages in the list of items. You can either include only Pages, only Files, or both. Please be aware that this feature will only include Pages where "Include in Site Search" is checked. This allows you to choose which Pages you want to include in the Folder View. |
| Include Files: | Check this in order to include Files in the list of items. You can either include only Pages, only Files, or both. |

The Folder View will include a link to the User's start Page at the top, if one exist and if the start Page is not the same as the Folder View Page.

The Folder View does not just show the items directly under the Page's folder; it also digs deep into child Folders in order to show all items. The Folder View will only show items that the Visitor has access to. The Visitor must be logged in in order to see Private or Membership items. Registration and Guest items will be shown, even if the Visitor is not logged in. Once the Visitor clicks on a Registration or Guest item, then he/she will be asked to login or register.

The Folder View does not show the following items:

- Items that User does not have access to.
- Folders that have no items to list.
- Pages that are not included in the site search.
- Archived items.
- The Folder View Page itself.

If Files are selected to be included, then Design Files will also be included.

Folders are listed in order by their sort order property. Pages and Files are listed in alphabetical order, with Pages being listed above Files.

If a Page has a web browser title, then that will be used for the link label. Otherwise, the Page name is used. If a web browser description exists then the description will be included below the link. For Files, the File name is always used for the link label. If a File has a description, then the description will be included below the link.

The name of a Folder, that a Visitor does not have view access to, might still be shown if the Folder contains a child Folder that the Visitor does have view access to. The Folder View works this way in order to preserve hierarchy and indentation. Pages and Files directly under the Folder are not shown (only the Folder name appears), so this does not cause a security issue.

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Photo Gallery Page Type

The Photo Gallery Page will create proportional thumbnail images to your specifications for all "Albums" and "Photos" that are inside of the same Folder as the Photo Gallery Page.

Here are the Page Type Properties available to this Page Type:

Number of Columns:	Set this to the number of columns that you wish to display on the Photo Gallery. This is the number of thumbnails that will go across the screen. Thumbnail images are created automatically based on the image they are associated with.
Thumbnail Max Size:	This is the maximum dimension that the thumbnails will be. The thumbnails will be scaled proportionally based on the value entered into this field. For example if you have a "Photo" that is 300 px by 200 px, and if you set the "Thumbnail Max Size" to 100, then the width of the thumbnail will be set to 100 and the height will be calculated automatically.

TIP: If you are using a digital camera, consider resizing the original image files rather than relying on the Thumbnail Max Size property to adjust the size of your images to fit the Page. This will also help your Photo Gallery Page to load faster.

Setting up Photo Galleries

Photo Gallery Pages display all "Albums" and "Photos" found in the same Folder as the Page itself.

If a Folder is inside of the Photo Gallery Page's Folder, and if it contains at least one "Photo", then the Folder is considered an "Album" and it will be displayed on the Photo Gallery Page. The viewer can then click on the "Album" to view all of the "Albums" and "Photos" inside of it.

A Photo Gallery Page will display all of the web-safe image files (.jpg, .gif, .tif, .png) that are found in the same Folder. Each image file is displayed in alphabetical order.

TIP: You can create unlimited Photo Galleries and control both the view access and edit access to them very easily by using Folders to secure your Pages and Files.

To setup a Photo Gallery:

- 1) Create a Folder for your Photo Gallery. You can also create sub-Folders within the Photo Gallery Page's Folder to be displayed as "Albums".
- 2) Create a Photo Gallery Page and place it in the Folder.
- 3) Zip your photos into a zip file and upload it into the same Folder as the Photo Gallery Page. If you are wanting to create "Albums" then you will need to repeat this step for each "Album" within the Photo Gallery Page's Folder.
- 4) View your Photo Gallery and adjust as necessary by editing it's Page Properties.

Securing your Photo Gallery:

- 1) Make sure that the Folder containing the Photo Gallery is either Membership or Private, depending on your intended audience. This will make the gallery only visible to these Users. If you select Private, you will also need to grant "view" rights to any Users that you wish to show the Photo Gallery too.
- 2) If you want to allow someone else to edit the Photo Gallery, grant them "edit" rights to the Folder.

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Search Results Page Type

The Search Results Page Type displays search results from either 1) Page regions (Pages) and their meta keywords. If any pages have "Promote on Keyword" selected, these Pages will be displayed at teh top of the search results (like sponsored ads on a search engine). This page can also display search results for one or more Product Groups and their associated Products and keywords.

Here are the Page Type Properties available to this Page Type:

Search Products:	<p>If Commerce is enabled in the Site Settings, then all Product Groups and Products within the "In Product Group" (below) will be included in the search results. If Search Products is disabled, only Page Region and Page keywords results will be displayed on this page.</p> <p>The scope of the search results is limited to all Product Groups and Products within this Product Group. This allows you to keep some Product Groups and Products hidden from the search results.</p>
In Product Group:	<p>NOTE: The Search Keywords for all of the Products and Product Groups inside of the Product Group that is selected will be added to the Tag Cloud.</p>
Catalog Detail Page:	<p>This is the Catalog Detail Page that will be used to view the Product Groups and Products that appear in the search results. If a Page is not selected, then the Product Groups and Products appearing in the search results will not be linked to their details.</p>

Calendar View Page Type

This Page Type displays all published Calendar Events from one or more Calendars. Calendars can be displayed by default in either month-at-a-glance, or a weekly listing format. The site Visitor can also pick the format, and view a single Calendar or overlay all Calendars specified in the Calendar View Page.

Here are the Page Type Properties available to this Page Type:

Calendars:	Select the Calendars that you have access to manage to include in this Calendar View Page.
View:	Specify the Calendar format. Monthly, Weekly or Upcoming. This will limit the number of Upcoming Events that will be displayed on the page.
Number of Events:	NOTE: Leave blank for unlimited Upcoming Events.
Calendar Event View:	If you wish to show the details for each Calendar Event, select the Calendar Event View Page that will display the details.

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Calendar Event View Page Type

Calendar Event View Page Type displays the details for a single Calendar Event. This Page must be displayed by clicking on the links generated by a Calendar View Page.

Here are the Page Type Properties available to this Page Type:

Select the Calendars that you will allow Event details to be displayed for.

Calendars:

NOTE: This should match the Calendar View Page's selection or your site Visitor will receive an error when attempting to access any Event details that you have not allowed.

Select this option if you want to display the Event's Notes field on the Page.

Show Notes:

TIP: The Notes field is useful if you want to special event or facility planning information for only your staff to view (on another Calendar Event View Page). Deselecting this field will hide the Notes.

Back Button
Label:

Specify the text that will be displayed on the "Back" to Calendar View Page button.

iCalendar

Calendar Item View Page visitors can export calendar events to their desktop calendar application such as Microsoft Outlook. On every Calendar Event View Page there will be an "iCalendar" link, and when clicked it will download an ICS file to their local computer and import this ICS file into their desktop calendar application.

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Custom Form Page Type

Custom Form Page Types allow you to create and collect custom forms like: event registrations, product registrations, surveys, sales and support inquiries, request forms, and many others.

Here are the Page Type Properties available to this Page Type:

Form Name:	<p>The is the unique name of the Custom Form that is embedded in the Page. It is used to identify the form's data captured and accessible in the [FORMS] area, and to connect the optional Custom Form Confirmation Page.</p> <p>NOTE: The Form Name can be changed at any time as long as you have deleted all submitted form data associated with the Custom Form.</p>
Enable Form:	<p>Select this when you want the Custom Form to collect submitted data. If this is not selected, the Custom Form and it's submit button will not appear within the Page.</p> <p>Select this option if you want to add "Quiz Question" fields to the Custom Form.</p>
Enable Quiz:	<p>This option prevents the submitter from reaching the confirmation message or next Page until they answer a certain percentage of the "Quiz Questions" correctly. This is useful for creating certification tests and displaying a certificate of completion ONLY if they obtain a passing percentage. If the submitter does not complete the correct percentage, they remain on the Custom Form page and a message is displayed. The Custom Form is submitted regardless of the percentage scored so that quiz administrators can audit the number of attempts and keep track of each score.</p>
Quiz Pass Percentage:	<p>If Enable Quiz is selected, specify the percentage of correct answers required before the Submitter is allowed to continue to the confirmation message or next Page.</p>
Label Column Width:	<p>This optional setting adjusts the horizontal width (in percent) of the label column within the Custom Form area of the Page. Use this setting to improve your form's layout.</p>
Enable Watcher Option:	<p>This optional setting will allow Users to add themselves to the watch list for the Page where Visitors might comment on the Submitted Form. You should select the Form Item View Page where the Submitted Form will appear and where Comments and watching are enabled.</p> <p>TIP: This feature is often used for a forum where the User who submits a thread might want to be notified about all replies to that thread.</p>
Submit Button Label:	<p>Enter the text you wish to display for the clickable Submit button.</p>
E-mail Submitter:	<p>Select this if you want to send an auto-responder e-mail to any Visitor that submits this Custom Form. The e-mail will be sent to the e-mail address that the Submitter entered into a field that was connected to the the Contact e-mail address field. Therefore, in order to use this feature you must have a field on this Custom Form where "Connect to Contact" is set to "E-mail Address". The from name for the e-mail will be set to the organization name in the site settings.</p>
From E-mail Address:	<p>Specify the e-mail address that should appear as the from address in the e-mail. If this field is left blank, then the support e-mail address from the site settings will be used.</p>
Subject:	<p>Specify the subject for the e-mail that is sent to the Submitter.</p> <p>You may include the name of a field (<i>^example^</i>) that is in this Custom Form in order to create a dynamic subject that contains submitted form data. Example: <i>^name^</i>, we have received your request.</p> <p>You may use the following format to output different content depending on whether there is a value or not:</p> <p>[[There is a value: <i>^example^</i> There is not a value]]</p>

You can use the following format to customize the date format for date and date & time fields. The format must be a [PHP date format](#).

Format:

^^field_name^^%%format%%

Example:

^^submitted_date_and_time^^%%l, F j, Y \a\t g:i A%%

Format:

Select whether you want the e-mail to contain plain text or HTML. Plain text is a simpler format that does not contain styling or images. HTML is a format like a webpage. If you select plain text, you will be asked to enter the body content for the e-mail. If you select HTML, you will be asked to select the Page that you want to send.

Specify the body content for the e-mail that is sent to the Submitter.

You may include the name of a field (^^example^^) that is in this Custom Form in order to create a dynamic body that contains submitted form data. Example: ^^name^^, we have received your request.

You may use the following format to output different content depending on whether there is a value or not:

Body:

[[There is a value: ^^example^^|| There is not a value]]

You can use the following format to customize the date format for date and date & time fields. The format must be a [PHP date format](#).

Format:

^^field_name^^%%format%%

Example:

^^submitted_date_and_time^^%%l, F j, Y \a\t g:i A%%

If you select HTML for the format, this field allows you to select an HTML Page to be e-mailed to the Submitter.

Page:

NOTE: If a Form Item View Page is selected to be e-mailed, then the Form Item View Page will be sent with the submitted data from this Custom Form in it.

Select this when you want to notify an administrator every time this Custom Form is submitted by a Visitor. This feature is used to send notifications to those coordinating activities around the form information.

E-mail
Administrator:

If there is a field connected to the Contact e-mail address field and the Submitter enters an e-mail address into the field, then that address will be used as the from name and from address. If an address for the Submitter cannot be found, then the from name will be set to the organization name in the site settings and the from address will be set to the support e-mail address in the site settings.

This is the e-mail address of the person (or group) that you wish to send the e-mail to when a form is successfully submitted.

To E-mail
Address:

TIP: You can specify multiple e-mail addresses if you separate each by a comma.

NOTE: If the Custom Form submitter selects a field option that is set to notify an administrator, then the e-mail will also be sent to that administrator.

BCC E-mail
Address:

This is the e-mail address of the person (or group) that you wish to BCC the e-mail to when a form is successfully submitted.

TIP: You can specify multiple e-mail addresses if you separate each by a comma.
Specify the subject of the e-mail that is sent to the Form Administrator.

You may include the name of a field (*^example^*) that is in this Custom Form in order to create a dynamic subject that contains submitted form data. Example: You received a message from *^name^*.

You may use the following format to output different content depending on whether there is a value or not:

Subject: [[There is a value: *^example^*|| There is not a value]]

You can use the following format to customize the date format for date and date & time fields. The format must be a [PHP date format](#).

Format:
^field_name^%%format%%

Example:
^submitted_date_and_time^%%l, F j, Y \a\t g:i A%%

Format: Select whether you want the e-mail to contain plain text or HTML. Plain text is a simpler format that does not contain styling or images. HTML is a format like a webpage. If you select plain text, you will be asked to enter the body content for the e-mail. If you select HTML, you will be asked to select the Page that you want to send.
Specify the body content for the e-mail that is sent to the administrator.

You may include the name of a field (*^example^*) that is in this Custom Form in order to create a dynamic body that contains submitted form data. Example: You received a message from *^name^*.

You may use the following format to output different content depending on whether there is a value or not:

Body: [[There is a value: *^example^*|| There is not a value]]

You can use the following format to customize the date format for date and date & time fields. The format must be a [PHP date format](#).

Format:
^field_name^%%format%%

Example:
^submitted_date_and_time^%%l, F j, Y \a\t g:i A%%

Page: If you select HTML for the format, this field allows you to select any Page to be e-mailed automatically to the Form's Administrator when a form is successfully submitted.

NOTE: If a Form Item View Page is selected to be e-mailed, then the Form Item View Page will be sent with the submitted data from this Custom Form in it.

Add to Contact Group: If there is a contact for the visitor that submits the custom form, then the contact will be added to this contact group.

Select this option if you want to grant a membership trial to the User that submits the Custom Form. If a membership trial is granted to a User, then the Contact's Member ID is set to the Reference Code for the Submitted Form, the Contact's Expiration Date is set according to the Trial Length field below, and the Contact is added to the membership

Contact Group, which is set in the settings. A Visitor is required to login or register in order to submit a Custom Form that grants a membership trial.

Grant Membership Trial:	A User is not allowed to submit a Custom Form that grants a membership trial if the User's Contact already has a Member ID. This prevents Users, whose membership has expired (e.g. previous trial Members), from obtaining a new membership trial.
Trial Length:	Enter the number of days that each User should be granted membership access. If you want to grant a membership trial, then the value of this field must be greater than 0.
Set Member's Start Page to:	If you also want to update the Member's Start Page, so that the Member is forwarded to a specific Page when he/she logs in, then you should select a page for this field. You may leave this field blank. It is not required in order to grant a membership trial.
Confirmation Type:	Select the type of confirmation that you want to appear after the Visitor submits the Custom Form. Select "Message" if you want a message to be shown on the Custom Form Page where the form normally appears. Select "Next Page" if you want the Visitor to be directed to a different Page.
Message:	Enter the message that you want to appear after the Visitor submits the Custom Form.
Next Page:	The Page that you want the system to go to when the Submit Button is clicked and the Custom Form is submitted successfully. Typically, you may wish for the system to go to a Custom Form Confirmation Page Type, or any other Page on your site - depending on your needs. If a Form Item View Page is selected, then when the User submits the Custom Form they will be sent to the Form Item View Page with the data that the user submitted.
Alternative Next Page:	Check this if you want certain Users to be directed to a different next Page based on whether they are in a specific Contact Group or not. This allows you to route Users to different destinations. Users must be logged in for this feature to work. You can place the Custom Form Page in a Folder with registration access control in order to require that.
If Contact Group:	Select the Contact Group that Users must be in, in order to be forwarded to the alternative next Page.
Then Go to Page:	Select the Page that you want Users to be directed to, for the alternative route. If a Form Item View Page is selected, then when the User submits the Custom Form they will be sent to the Form Item View Page with the data that the User submitted.
If User has already submitted form in the past, then show:	Select what you want to appear if a User has already submitted the Custom Form in the past and is returning to it again. If you want Users to be able to submit the Custom Form multiple times, then select "Custom Form". If you want to prevent Users from submitting the Custom Form multiple times, then select either "Message" or "Page". Users must be logged in for this feature to work. You can place the Custom Form Page in a Folder with registration access control in order to require that.
Message:	As an editor, if you are needing to view the form and you can't because you have submitted it in the past, then you may access the form by clicking on the Page from the Pages tab. Enter the message that you want to appear if the User has submitted the Custom Form in the past.
Page:	The Page that you want the system to go to if the User has already submitted the Custom Form in the past. If a Form Item View Page is selected, then the data that the User submitted last time can appear on the Page.
Alternative Page:	Check this if you want certain Users to be directed to a different Page based on whether they are in a specific Contact Group or not. This allows you to route Users to different destinations. Users must be logged in for this feature to work. You can place the Custom Form Page in a Folder with registration access control in order to require that.
If Contact Group:	Select the Contact Group that Users must be in, in order to be forwarded to the alternative Page.
Then Go to Page:	Select the Page that you want Users to be directed to, for the alternative route. If a Form Item View Page is selected, then the data that the User submitted last time can appear on the Page.

Work-flow features of Custom Forms

Custom Forms include built-in work-flow features, allowing you to create auto-responders easily, display confirmations for printing, and even send the form's confirmation to the Submitter and/or to other staff member to alert them each time a Custom Form is submitted.

Custom Forms work like all other Pages, which allow you to chain Custom Form Pages together or with other Page Types to easily create your own custom work flows.

1) Create or update the Submitter's User and Contact Information

When a Custom Form is submitted successfully, a new Contact is created and the Contact is added to the "Add to Contact Group" group if it is specified. If a Contact is found for the Submitter (i.e. the Submitter has already logged in), then any Custom Form field that has the optional "Connect to Contact" field property selected will update the Contact's data automatically.

2) Send optional confirmation/information to Submitter

When a Custom Form is submitted successfully, the optional "E-mail Submitter" fields can be specified and the system will send an e-mail each time the Custom Form is submitted successfully. If a Custom Form Confirmation Page is selected to be e-mailed, then the system will include the Submitters form data (from the current browser session) based on the Confirmation Pages' associated "Custom Form" property. If the Page is not a Custom Form Confirmation Type, then the system will simply send the Page without any form data.

NOTE: This auto-responder feature requires that you create a field that is connected to the Contact e-mail address field. Otherwise, the system will NOT send the e-mail.

3) Send optional confirmation/notification to Administrator(s)

When a Custom Form is submitted successfully, the optional "E-mail Administrator" fields can be specified and the system will send an e-mail each time the Custom Form is submitted successfully. If a Custom Form Confirmation Page is selected, then the system will include the Submitters form data based on the Confirmation Pages' associated "Custom Form" property. If the Page is not a Custom Form Confirmation Type, then the system will simply send the Page without any form data.

4) Show confirmation message or go to another Page

When a Custom Form is submitted successfully then a confirmation message can be shown or, if the next Page property is specified, the Submitter will be redirected to the next page.

5) Make the confirmation message or next Page conditional by selecting the Enable Quiz option.

This is useful for creating certification tests and displaying a certificate of completion ONLY if they obtain a passing percentage. If the submitter does not complete the correct percentage, they remain on the Custom Form page and a message is displayed. The Custom Form is submitted regardless of the percentage scored so that quiz administrators can audit the number of attempts and each score.

Custom Form Behaviors

Custom Forms are flexible, allowing you to create many form processes for your specific needs by linking them together with each other and with other Page Types to customize your site's work flow.

Custom Forms share data with Contacts, so that data collected can be pre-filled and used to populate Contact information and My Account information, and other Custom Forms.

Custom Forms are work flow-enabled, allowing you to e-mail confirmations, create auto-responders, and send

alerts to the Submitter and to your staff whenever a particular Custom Form is submitted.

Each Custom Form can also have one or more Custom Form Confirmation Pages associated with them to display and/or e-mail a Custom Form's data to the Submitter, and to notify your staff of the completed form. This is ideal for displaying (and e-mailing) the Custom Form data collected to the Submitter, along with a unique confirmation number for future reference.

A Custom Form cannot be deleted if any of it's submitted data exists. If no form data exists, then the Page is allowed to be deleted or the Page Type is allowed to be changed.

When a Page containing a Custom Form is "Duplicated", the underlying Form Definition (fields and their values) is also duplicated into the new Page. The duplicated Page and embedded Custom Form are not related to the original Page or Custom Form. You can rename the Custom Form at any time, just like the duplicated Page.

If you need to temporarily or permanently disable a Custom Form from collecting new data, you can edit the Page containing the Custom Form and set it's Page Type Properties.

Files uploaded using Custom Forms will be deleted automatically when the Submitted Form is deleted.

Securing Custom Forms & Submitted Form Data Collected

Since Custom Forms are integrated into Pages, each Custom Forms is embedded into a Page and shares the Page's security. By simply moving the Page containing a Custom Form to a different Folder, you can control the access to submit, view, and edit Custom Forms and their associated data.

Any User that has "Edit" rights to a Folder that contains the Custom Form Page, can edit the Custom Form AND it's data.

Any Visitor or User with "View" rights to a Folder containing a Custom View Page Type, can view form data it displays REGARDLESS of their access rights to the Folder where the Custom Form Page resides. Be sure that you limit the View Designer to include only data that you want to display to the Visitor or User.

Any User with "Edit" rights to a Folder containing a Custom View Page will also see an [Edit] button on the bottom of the page when viewing it. They can click on the edit button to edit the selected Forms Custom View Data Page Type.

Files uploaded using Custom Forms are assigned to specified Folders, thus all access rights to the Folder also apply to the uploaded files.

SPAM Protection

Spammers use unprotected web forms in an attempt to use another's website to post and broadcast their own advertising. To combat this malicious technique, if CAPTCHA is enabled in the Site Settings then all Custom Forms have a built-in CAPTCHA feature that is automatically enabled if a Custom Form is displayed to any site visitor that has is not logged into the website. The CAPTCHA asks a simple challenge question that the visitor must answer correctly in order to submit the Custom Form.

Disconnect from Contact Feature

There are times when your staff may need to submit a Custom Form on behalf of another person or User. When this occurs, any "Connect to Contact" fields in the Custom Form will overwrite the Submitter's Contact information. In this case, the "Connect to Contact" feature is undesirable. To disable this feature, a special value ("connect_to_contact=false") can be added to any Custom Form Page link to disable this feature for any Submitted Form:

Example: "/pages/custom_form_page?connect_to_contact=false"

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Edit Custom Form

There are several different field types that can be added to any Custom Form. Each field type has properties to allow you to collect many different types of information.

To edit any existing Custom Form field, select the Field. To add a new Custom Form Field, click "Create Form Field".

NOTE: A Custom Form Field cannot be deleted if any Submitted Form has been captured that includes data for this field. To delete a field, you must first delete all the submitted form data for this Custom Form. (This limitation is not true for Product Forms, which can be modified at any time, without deleting their corresponding submitted Orders.)

Create/Edit Custom Form Field

There are several different field types that can be added to any Custom Form. Each field type has properties to allow you to collect many different types of information.

Here is a list of the Field Types you can collect using a Custom Form and their associated properties:

	Text Box
Type:	This field type is used to collect a single line of text data.
Name:	This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported. This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.
RSS	category: This is the RSS category that the Submitted Form will be in. title: This is the RSS title for the Submitted Form. description: This is the RSS description for the Submitted Form.
Element:	TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created. TIP: You will need to make sure that the Form Item View page property for the Form List View Page is set or that the layout for the Form List View contains a link to a Form Item View Page so that the links in the RSS will work.
Label:	This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed.
Required:	If data must be present in this field for the Custom Form to be submitted, check this box.
Default Value:	If this field should have a default value when the Custom Form is filled in, enter the value here. If the field is also required, this value will meet that requirement.
Size:	The size in characters of the input field.
Maximum Characters:	This is the maximum number of characters that you will allow to be entered in this field.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form. If you would like this field to be pre-filled with a field from the Submitter's Contact record, select the field you would like to connect. When the Custom Form is submitted, the Contact field will be updated with the value submitted for this field.
Connect to Contact:	NOTE: This feature will only work if the Submitter is logged into the system when the form data is submitted (ie. the Page containing the Custom Form is located in a non-public Folder). Also, take care not to connect to a Contact field that cannot store the same type of data or you may experience unexpected results (see Contacts for more information). TIP: If someone needs to submit a Custom Form on behalf of someone else and the submitter does not want his/her Contact info prefilled or updated, then the submitter can add "?connect_to_contact=false" to the end of the URL in order to disable the Connect to Contact feature. An example appears below. http://www.example.com/pages/custom_form?connect_to_contact=false
Office Use Only:	Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field. Check this box to include this field's value in the passing percentage calculation. (This field works

Quiz Question:	in conjunction with the "Enable Quiz" and "Quiz Pass Percentage" properties of the Custom Form, which prevents the submitter from going to the "Next Page" without a passing percentage.)
Correct Answer:	Enter the value to match against the value entered by the Custom Form's submitter. This value is not case-sensitive. Leading and trailing spaces will be ignored.
Text Area	
Type:	This field type is used to collect multiple lines of text data.
Name:	<p>This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported.</p> <p>This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.</p>
RSS Element:	<p>category: This is the RSS category that the Submitted Form will be in.</p> <p>title: This is the RSS title for the Submitted Form.</p> <p>description: This is the RSS description for the Submitted Form.</p>
	TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created.
Label:	This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed
Required:	If data must be present in this field for the Custom Form to be submitted, check this box.
Default Value:	To pre-fill the field with a value when the Custom Form is displayed, enter the value here. If the field is also required, this value will meet that requirement.
Maximum Characters:	This is the maximum number of characters that you will allow to be entered in this field.
Rows:	The total number of rows of text to display in the input field.
Columns:	The total number of columns of text to display in the input field.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	<p>Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.</p> <p>If you would like this field to be pre-filled with a field from the Submitter's Contact record, select the field your would like to connect. When the Custom Form is submitted, the Contact field will be updated with the value submitted for this field.</p>
Connect to Contact:	<p>NOTE: This feature will only work if the Submitter is logged into the system when the form data is submitted (i.e. the Page containing the Custom Form is located in a non-public Folder). Also, take care not to connect to a Contact field that cannot store the same type of data (see Contacts for more information).</p> <p>TIP: If someone needs to submit a Custom Form on behalf of someone else and the submitter does not want his/her Contact info prefilled or updated, then the submitter can add "?connect_to_contact=false" to the end of the URL in order to disable the Connect to Contact feature. An example appears below.</p> <p>http://www.example.com/pages/custom_form?connect_to_contact=false</p>
Office Use Only:	<p>Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field.</p> <p>NOTE: Text Area fields cannot be Quiz Questions.</p>

Pick List

Type:	This field type is used to collect one or more values from a drop-down list of predefined values.
Name:	<p>This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported.</p> <p>This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.</p>
RSS Element:	<p>category: This is the RSS category that the Submitted Form will be in.</p> <p>title: This is the RSS title for the Submitted Form.</p> <p>description: This is the RSS description for the Submitted Form.</p> <p>TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created.</p>
Label:	This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed
Required:	If data must be present in this field for the Custom Form to be submitted, check this box.
Default Value:	To pre-fill the field with a value when the Custom Form is displayed, enter the value here. If the field is also required, this value will meet that requirement.
Size:	The size in characters of the input field.
Allow Multiple Values:	If you want to accept multiple values, check this box.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	<p>Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.</p> <p>If you would like this field to be pre-filled with a field from the Submitter's Contact record, select the field you would like to connect. When the Custom Form is submitted, the Contact field will be updated with the value submitted for this field.</p>
Connect to Contact:	<p>NOTE: This feature will only work if the Submitter is logged into the system when the form data is submitted (i.e. the Page containing the Custom Form is located in a non-public Folder). Also, take care not to connect to a Contact field that cannot store the same type of data (see Contacts for more information).</p> <p>TIP: If someone needs to submit a Custom Form on behalf of someone else and the submitter does not want his/her Contact info prefilled or updated, then the submitter can add "?connect_to_contact=false" to the end of the URL in order to disable the Connect to Contact feature. An example appears below.</p> <p>http://www.example.com/pages/custom_form?connect_to_contact=false</p>
Office Use Only:	<p>Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field.</p> <p>"Choices" allow you to display a list of items with each item in the list representing a (optional) corresponding "value" that is actually stored with the form data. Enter the displayed choices and their optional corresponding values, separated by a pipe symbol " ". Separate each pick list item with a carriage return.</p>
Choices:	<p>There are three possible formats for this field type:</p> <p>Choice 1,... (Displays "Choice 1" and stores "Choice 1" if selected)</p> <p>Choice 1 Value 1,... (Displays "Choice 1" and stores "Value 1" if selected)</p>

Choice 1 | Value 1 | on

(Displays "Choice 1" which is selected by default, and stores "Value 1" if selected)

If you want to e-mail an additional administrator when a Visitor selects a specific choice, then you may add ^^example@example.com^^ to the end of the choice line, as can be seen in the example below. You should replace example@example.com with the administrator's e-mail address. Also, the administrator e-mail properties must be set in the Page Type Properties for the Custom Form. This feature is supported for Custom Forms but not Product Forms.

Choice 1 ^^example@example.com^^

Quiz
Question:

Check this box to include this field's value in the passing percentage calculation. (This field works in conjunction with the "Enable Quiz" and "Quiz Pass Percentage" properties of the Custom Form, which prevents the submitter from going to the "Next Page" without a passing percentage.)

Correct
Answer:

Enter the value to match against the value entered by the Custom Form's submitter. This value is not case-sensitive. Leading and trailing spaces will be ignored.

Radio Button

Type:

This field type is used to collect only one value from a list of values.

Name:

This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported.

This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.

RSS
Element:

category: This is the RSS category that the Submitted Form will be in.

title: This is the RSS title for the Submitted Form.

description: This is the RSS description for the Submitted Form.

TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created.

Label:

This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed

Required: If data must be present in this field for the Custom Form to be submitted, check this box.

Default
Value: To pre-fill the field with a value when the Custom Form is displayed, enter the value here. If the field is also required, this value will meet that requirement.

Position: This is the vertical position or order of this field relative to all the other Custom Form Fields.

Spacing: Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.

If you would like this field to be pre-filled with a field from the Submitter's Contact record, select the field you would like to connect. When the Custom Form is submitted, the Contact field will be updated with the value submitted for this field.

Connect to
Contact: NOTE: This feature will only work if the Submitter is logged into the system when the form data is submitted (ie. the Page containing the Custom Form is located in a non-public Folder). Also, take care not to connect to a Contact field that cannot store the same type of data (see Contacts for more information).

TIP: If someone needs to submit a Custom Form on behalf of someone else and the submitter does not want his/her Contact info prefilled or updated, then the submitter can add "?connect_to_contact=false" to the end of the URL in order to disable the Connect to Contact feature. An example appears below.

http://www.example.com/pages/custom_form?connect_to_contact=false

Office Use Only: Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data (see [FORMS & VIEWS]) will be able to view and modify this field.

"Choices" allow you to display a list of items with each item in the list representing a (optional) corresponding "value" that is actually store with the form data. Enter the displayed choices and their optional corresponding values, separated by a pipe symbol "|". Separate each pick list item with a carriage return.

There are three possible formats for this field type:

Choice 1,...
(Displays "Choice 1" and stores "Choice 1" if selected)

Choices: Choice 1 | Value 1,...
(Displays "Choice 1" and stores "Value 1" if selected)

Choice 1 | Value 1 | on
(Displays "Choice 1" which is selected by default, and stores "Value 1" if selected)

If you want to e-mail an additional administrator when a Visitor selects a specific choice, then you may add ^^example@example.com^^ to the end of the choice line, as can be seen in the example below. You should replace example@example.com with the administrator's e-mail address. Also, the administrator e-mail properties must be set in the Page Type Properties for the Custom Form. This feature is supported for Custom Forms but not Product Forms.

Choice 1 ^^example@example.com^^

Quiz Question: Check this box to include this field's value in the passing percentage calculation. (This field works in conjunction with the "Enable Quiz" and "Quiz Pass Percentage" properties of the Custom Form, which prevents the submitter from going to the "Next Page" without a passing percentage.)

Correct Answer: Enter the value to match against the value entered by the Custom Form's submitter. This value is not case-sensitive. Leading and trailing spaces will be ignored.

Check Box

Type: This field type is used to collect one or more values from a list of values.

Name: This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported.

This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.

RSS Element: category: This is the RSS category that the Submitted Form will be in.
title: This is the RSS title for the Submitted Form.
description: This is the RSS description for the Submitted Form.

TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created.

Label: This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed

Required: If data must be present in this field for the Custom Form to be submitted, check this box.

Default Value: To pre-fill the field with a value when the Custom Form is displayed, enter the value here. If the field is also required, this value will meet that requirement.

Position: This is the vertical position or order of this field relative to all the other Custom Form Fields.

- Spacing:** Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.
- If you would like this field to be pre-filled with a field from the Submitter's Contact record, select the field you would like to connect. When the Custom Form is submitted, the Contact field will be updated with the value submitted for this field.
- Connect to Contact:** NOTE: This feature will only work if the Submitter is logged into the system when the form data is submitted (ie. the Page containing the Custom Form is located in a non-public Folder). Also, take care not to connect to a Contact field that cannot store the same type of data (see Contacts for more information).
- TIP:** If someone needs to submit a Custom Form on behalf of someone else and the submitter does not want his/her Contact info prefilled or updated, then the submitter can add "?connect_to_contact=false" to the end of the URL in order to disable the Connect to Contact feature. An example appears below.
- http://www.example.com/pages/custom_form?connect_to_contact=false
- Office Use Only:** Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field.
- Choices:** "Choices" allow you to display a list of items with each item in the list representing a (optional) corresponding "value" that is actually stored with the form data. Enter the displayed choices and their optional corresponding values, separated by a pipe symbol "|". Separate each pick list item with a carriage return.
- There are three possible formats for this field type:
- Choice 1,...
(Displays "Choice 1" and stores "Choice 1" if selected)
- Choice 1 | Value 1,...
(Displays "Choice 1" and stores "Value 1" if selected)
- Choice 1 | Value 1 | on
(Displays "Choice 1" which is selected by default, and stores "Value 1" if selected)
- If you want to e-mail an additional administrator when a Visitor selects a specific choice, then you may add ^^example@example.com^^ to the end of the choice line, as can be seen in the example below. You should replace example@example.com with the administrator's e-mail address. Also, the administrator e-mail properties must be set in the Page Type Properties for the Custom Form. This feature is supported for Custom Forms but not Product Forms.
- Choice 1 ^^example@example.com^^
- Quiz Question:** Check this box to include this field's value in the passing percentage calculation. (This field works in conjunction with the "Enable Quiz" and "Quiz Pass Percentage" properties of the Custom Form, which prevents the submitter from going to the "Next Page" without a passing percentage.)
- Correct Answer:** Enter the value to match against the value entered by the Custom Form's submitter. This value is not case-sensitive. Leading and trailing spaces will be ignored.

File Upload

- Type:** This field type is used to upload an Attachment to the Submitted Form. For example, a Visitor might want to upload a picture or a PDF in order to share more information. An Attachment will be deleted automatically when its Submitted Form is deleted. Attachments can be found easily via My Attachments in the Files tab.

Name:	This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported.
Label:	This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed.
Required:	If data must be present in this field for the Custom Form to be submitted, check this box.
Upload to:	Select the Folder where the File will be stored. This ensures the proper file access rights protection for the file.
Size:	The size in characters of the input field.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.
Office Use Only:	Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field. NOTE: File Upload fields cannot be Quiz Questions. NOTE: For Product Forms, this field type is not supported.

Information

Type:	This field type is used to add custom text and information between fields.
Name:	This is the Name of this field. It is displayed for positioning purposes only. Since this field type does not collect form data, it is not exported.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.
Information:	Enter text or HTML in this area that you wish to be displayed in the Custom Form and Custom Form Confirmation.
Office Use Only:	Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field. NOTE: Information fields cannot be Quiz Questions.

E-mail Address

Type:	This field type is used to collect a single line of text data that must be formatted as a valid internet e-mail address.
Name:	This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported. This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.
RSS Element:	category: This is the RSS category that the Submitted Form will be in. title: This is the RSS title for the Submitted Form. description: This is the RSS description for the Submitted Form. TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created.

Label:	This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed
Required:	If data must be present in this field for the Custom Form to be submitted, check this box.
Default Value:	If this field should have a default value when the Custom Form is filled in, enter the value here. If the field is also required, this value will meet that requirement.
Size:	The size in characters of the input field.
Maximum Characters:	This is the maximum number of characters that you will allow to be entered in this field.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form. If you would like this field to be pre-filled with a field from the Submitter's Contact record, select the field your would like to connect. When the Custom Form is submitted, the Contact field will be updated with the value submitted for this field.
Connect to Contact:	NOTE: This feature will only work if the Submitter is logged into the system when the form data is submitted (ie. the Page containing the Custom Form is located in a non-public Folder). Also, take care not to connect this field to a Contact field that cannot store the same type of data (see Contacts for more information). TIP: If someone needs to submit a Custom Form on behalf of someone else and the submitter does not want his/her Contact info prefilled or updated, then the submitter can add "?connect_to_contact=false" to the end of the URL in order to disable the Connect to Contact feature. An example appears below. http://www.example.com/pages/custom_form?connect_to_contact=false
Office Use Only:	Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field.
Quiz Question:	Check this box to include this field's value in the passing percentage calculation. (This field works in conjunction with the "Enable Quiz" and "Quiz Pass Percentage" properties of the Custom Form, which prevents the submitter from going to the "Next Page" without a passing percentage.)
Correct Answer:	Enter the value to match against the value entered by the Custom Form's submitter. This value is not case-sensitive. Leading and trailing spaces will be ignored.

Date

Type:	This field type is used to collect a single calendar date, and attempts to resolve the date no matter what format is used to enter the date value.
Name:	This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported. This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.
RSS Element:	category: This is the RSS category that the Submitted Form will be in. title: This is the RSS title for the Submitted Form. description: This is the RSS description for the Submitted Form. TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created.
Label:	This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom

	Form Confirmation, and when the collected form data is viewed.
Required:	If data must be present in this field for the Custom Form to be submitted, check this box.
Default Value:	If this field should have a default value when the Custom Form is filled in, enter the value here. If the field is also required, this value will meet that requirement.
Size:	The size in characters of the input field.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.
Office Use Only:	Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field.
Quiz Question:	Check this box to include this field's value in the passing percentage calculation. (This field works in conjunction with the "Enable Quiz" and "Quiz Pass Percentage" properties of the Custom Form, which prevents the submitter from going to the "Next Page" without a passing percentage.)
Correct Answer:	Enter the value to match against the value entered by the Custom Form's submitter. This value is not case-sensitive. Leading and trailing spaces will be ignored.

Date and Time

Type:	This field type is used to collect a calendar date and time (timestamp), and attempts to resolve the date and time no matter what format is used to enter the value.
Name:	This is the Name of this field. It is displayed for sorting purposes and is the column heading when the collected form data for this field is exported. This will link a Custom Form field to an RSS Element. RSS Elements are used with Form List View Page Types to broadcast Submitted Forms as an RSS feed.
RSS Element:	category: This is the RSS category that the Submitted Form will be in. title: This is the RSS title for the Submitted Form. description: This is the RSS description for the Submitted Form.
	TIP: You must have at least one field in your Custom Form linked to an RSS Element before a feed can be created.
Label:	This is the Label that is displayed to the left of the field in the Custom Form, the optional Custom Form Confirmation, and when the collected form data is viewed.
Required:	If data must be present in this field for the Custom Form to be submitted, check this box.
Default Value:	If this field should have a default value when the Custom Form is filled in, enter the value here. If the field is also required, this value will meet that requirement.
Size:	The size in characters of the input field.
Position:	This is the vertical position or order of this field relative to all the other Custom Form Fields.
Spacing:	Select "Above" if you wish to create double-spacing above the field in the Custom Form. Select "Below" if you wish to create double-spacing below the field in the Custom Form.
Office Use Only:	Check this box to hide this field from the Submitter. Once the Custom Form is submitted, Users that have access to the form's data will be able to view and modify this field.
Quiz Question:	Check this box to include this field's value in the passing percentage calculation. (This field works in conjunction with the "Enable Quiz" and "Quiz Pass Percentage" properties of the Custom Form, which prevents the submitter from going to the "Next Page" without a passing percentage.)
Correct Answer:	Enter the value to match against the value entered by the Custom Form's submitter. This value is not case-sensitive. Leading and trailing spaces will be ignored.

Custom Form Confirmation Page Type

The Custom Form Confirmation Page Type allows you to display a confirmation page after a Custom Form has been submitted. This page will display the data submitted, a reference code for the form data, and a timestamp of the receipt of the form data. This Page can also be e-mailed to the Submitter, as well as e-mailed to anyone on your staff.

Here are the Page Type Properties available to this Page Type:

Custom Form:	Select the existing Custom Form from which you want to display it's data when the Custom Form Page is submitted.
Continue Button Label:	Enter the text you wish to display for the "Submit" button.
Next Page:	The Page that you want the Submitter directed to when the "Continue" Button is clicked.

NOTE: This Page will only display the information if the submitted form has been found during the current session (before they leave the website or close their browser).

[Back to Edit Page Properties](#)

Form Item View Page Type

Form Item View Page Type displays a single row of data collected from a single Custom Form (a submitted form). You can define a layout for the fields you want to display. Not all data collected on a form must be visible, you can decide which item's are visible and even mask or hide some fields.

Here are the Page Type Properties available to this Page Type:

Allow only submitter and watchers to view his/her submitted form(s):	<p>Select this option if you would like only the Submitter of the original submitted form data along with any specified Watchers to have access to view the submitted form data.</p> <p>TIP: This is useful for creating private conversation threads where the submitted form data could contain sensitive information and needs to be shared only with the Submitter and those to have been added as Watchers by either the Submitter or Site Manager.</p> <p>Select this option if you would like the form data (that appears in the Form Item View Page to be editable by any registered User.</p>
Allow any registered user to edit submitted form(s):	<p>TIP: This is useful for creating a simple Wiki, allowing those that have view access to the Page to make updates, even through they may not have any content management rights.</p> <p>Select this option if you want only the Submitter of the original submitted form data to edit their own information.</p>
Allow submitter to edit his/her submitted form(s):	<p>TIP: This is useful for creating a member directory, so each member can keep their own information current, even through they don't have content management access.</p>

To design your Form View Page's layout of the data fields and add any data filters, put the Page into "Edit Mode" or edit the Page Properties, and then edit the embedded Form View.

Setting up a Form Item View Page

If you are linking a Form Item View Page from a Form List View Page then edit your Form List View Page and create a link to the Form Item View Page using this format:

/pages/my_form_item_view_page&r=^^reference_code^^

The ^^reference_code^^ value will be supplied automatically when the Form List View Page is displayed, thus connecting the referenced row of data from the Submitted Form to the Form Item View.

NOTE: If you selected a Form Item view Page to be e-mailed when a Custom Form is submitted, then the Form Item View Page will display the data from the Custom Form that was submitted. Also, if a Form Item View Page is selected to be the Next Page for the Custom Form, then when the User submits the Custom Form they will be sent to the Form Item View Page with the appropriate Reference Code.

[Back to Edit Page Properties](#)

Edit Form Item View

Update this Page's display of select data from a single Submitted Form. (It must be linked to from a Form List View Page.)

Copy existing Custom Form fields from the top of the Page and paste them in the Rich-text Editor window.

Use the following URL format to link to files and embed images:

`/files/^^example^^`, where *example* is a form field that contains the name of the File uploaded.

Use the following format to output different content depending on whether there is a value or not:

`[[He entered ^^name^^ as his name.||He did not enter a name.]]`

You can use the following format to customize the date format for date and date & time fields. The format can either be a [PHP date format](#) or "relative" for a relative time (e.g. "2 minutes ago", "2 minutes from now").

Format:

`^^field_name^^%%format%%`

Examples:

`^^submitted_date_and_time^^%%l, F j, Y \a\t g:i A%%`

`^^submitted_date_and_time^^%%relative%%`

NOTE: For "relative" date/time formatting, once the date goes beyond one month, the full date and/or time is displayed.

Comment Fields

There are several system fields (see below) which allow you to display information about Comments that have been added to Submitted Forms. These fields can be used to setup a forum that shows the number of replies and newest reply for various topics.

- `^^number_of_comments^^`: The total number of Comments that have been added to a Submitted Form.
- `^^newest_comment_name^^`: The name of the person who added the newest Comment. If the name field was left blank, then "Anonymous" will be displayed.
- `^^newest_comment^^`: A preview of the newest Comment (limited to 100 characters).
- `^^newest_comment_date_and_time^^`: The date and time that the newest Comment was added.
- `^^newest_comment_id^^`: The ID for the newest Comment. This field can be used to link directly to the newest Comment (see below).
- `^^newest_activity_date_and_time^^`: If a Comment does not exist, then this is the date and time that the Submitted Form was submitted. Otherwise, if a Comment does exist, then this is the date and time that the newest Comment was added.

Use the following URL format to link directly to the newest Comment:

`#software_comment_^^newest_comment_id^^`

Form List View Page Type

Form List View Page Type displays one or more rows of submitted data collected from a Custom Form.

Here are the Page Type Properties available to this Page Type:

Custom Form:	Select the existing Custom Form from which you want to display it's submitted form data.
Form Item View:	Select the Form Item View that this Form List View will link to. This is used by various features (e.g. Form View Directory) in order to determine which Form Item View is connected to this Form List View. This field is used by the RSS feature in order to determine which Page to link each RSS item to. If this field is left unselected, then the RSS feature will attempt to find the correct Page by looking for a link in the layout for this Page.

TIP: To design your Form View Page's layout of the data fields and add any data filters, put the Page into "Edit Mode" or edit the Page Properties, and then edit the embedded Form View.

[Back to Edit Page Properties](#)

Edit Form List View

This screen allows you to layout the display of data from multiple submitted forms. This is one of the most powerful features of the system.

You can update the way this Page's displays of data from multiple Submitted Forms, and optionally link this Page to a Form Item View Page that will display an individual submitted form using the `^^reference_code^^` system field.

All available submitted form fields for display within View

All the available fields that can be displayed are listed, sandwiched between the double-caret (`^^`) which are used by the system to identify where to replace the fields with data when displaying the Page. Simply copy any of the fields (be sure to include the double-carets) into the Layout area.

System Fields

System Fields are fields that are available to include in your layout that are automatically created for all Submitted Form data.

Form Fields

Form Fields are fields where created on the Custom Form that the Custom Form List View Page is associated with (through it's Page Properties).

Comment Fields

There are several system fields which allow you to display information about Comments that have be added to Submitted Forms. These fields can be used to setup a forum that shows the number of replies and newest reply for various topics.

- `^^number_of_comments^^`: The total number of Comments that have been added to a Submitted Form.
- `^^newest_comment_name^^`: The name of the person who added the newest Comment. If the name field was left blank, then "Anonymous" will be displayed.
- `^^newest_comment^^`: A preview of the newest Comment (limited to 100 characters).
- `^^newest_comment_date_and_time^^`: The date and time that the newest Comment was added.
- `^^newest_comment_id^^`: The ID for the newest Comment. This field can be used to link directly to the newest Comment (see below).
- `^^newest_activity_date_and_time^^`: If a Comment does not exist, then this is the date and time that the Submitted Form was submitted. Otherwise, if a Comment does exists, then this is the date and time that the newest Comment was added. If you are creating a forum then you will want to set the Order by to this field (descending), so that topics with the most recent activity will appear first in the list.

Use the following URL format to link directly to the newest Comment on the Form Item View Page:

`/pages/example?r=^^reference_code^^#software_comment_^^newest_comment_id^^` where *example* is the name of the Form Item View Page.

Hints

Hints provide a quick way of cutting and pasting common layout values into your layout area.

Display layout of submitted form data fields within View

The Form List View Layout area, or "layout" is where you place your available fields to be replaced by the actual data fields from the Submitted Forms. The layout area represents a single submitted form's data. Think of this area as a row in a spreadsheet, or table. It will be output over and over until all the Submitted Forms are displayed.

Linking to a Form Item View Page

Most of the time, you will not only want to display the Submitted Form data in a List, but also allow your site visitors to "drill into" the actual Submitted Form data and view additional fields that are not added to the layout itself. The Form Item View Page will do this for you. But you will need to create a link and pass the reference code of each specific Submitted Form data. To do this, include the following URL format within your layout and the system will dynamically insert a link to each Submitted Form's data when the Page is displayed:

`/pages/example?r=^^reference_code^^` where *example* is the name of the Form Item View Page that is setup to display the same Custom Form.

Displaying Conditional Information

You can display information within the layout area based on a value being available to display. For example, you may want to hide the label of the field if it is not present the Submitted Form data. Use the following format to output different content depending on whether there is a value or not:

`[[There is a value: ^^example^^ || There is not a value]]`

Link to File Upload Field Data

If you have created a Custom Form with File Upload fields on it, you will need to dynamically link to them through the layout. To do this, use the following URL format:

`/files/^^example^^`, where *example* is a form field that contains the name of the File uploaded.

Displaying Date/Time Values

You want to format your date and time values in different ways for spacing or affect. The system allows you to use virtually any format you desire. To customize the date and time values for the available time and date fields, use the following format within your layout:

Format:

`^^field_name^^%%format%%`

format can either be a [PHP date format](#) or "relative" for a relative time (e.g. "2 minutes ago", "2 minutes from now").

Examples:

`^^submitted_date_and_time^^%%l, F j, Y \a\t g:i A%%`

`^^submitted_date_and_time^^%%relative%%`

NOTE: For "relative" date/time formatting, once the date goes beyond one month, the full date and/or time is displayed.

Sort order of submitted form data within View

You can sort the order in which the Submitted Form data (rows) are output.

NOTE: "Random" sort order is only available for the first sort order option but is useful if you want the rows of Submitted Form data to be displayed in a random order each time the Page is displayed.

Limit the amount of data within each View Page

You can limit the number of Submitted Forms (data rows) are displayed on the page. If you don't set the Maximum Number of Results Per Page, then the system will output pagination navigation automatically.

Define what submitted form data can be displayed by the View

You can add filters that define exactly which Submitted Forms (data rows) are displayed on the Page.

TIP: If you wish to further filter a Form List View to only allow a Submitter to view their own Submitted Form data, add an E-Mail Address Field to your Custom Form and then add a Filter where the "Submitter" "is equal to" the "Viewer". This will allow you to place the Form List View Page into a Folder that many Users can view, but any Submitted Form data from other Users will be hidden for them.

Search & Browse

Allow Visitor to search data

Enable Search:

Check this to add a search box to the Form List View Page. Search will allow the Visitor to enter a keyword and the system will search all (filtered) Form List View data for the keyword and display the resulting Submitted Form data (rows) that contain that keyword.

NOTE: The keyword search will search all system and custom form fields, not just fields that appear in the display layout above.

Check this to allow the Visitor to search specific fields. A toggle button (i.e. +/-) will appear that allows the Visitor to expand or collapse the advanced search. The Visitor may use the keyword search and advanced search at the same time. You may define the fields that are available in the layout below.

Enable
Advanced
Search:

The results will only be filtered for the advanced search fields that the Visitor completes. If a Visitor leaves a field blank, then that field will be ignored.

In general, fields will appear as they are defined in the Custom Form Field properties. For example, if a field has a text box type, then it will appear as a text box in the advanced search. There are some exceptions to this. For example, a text area field will appear in the advanced search as a text box, because the Visitor will not need a full text area to enter a search term.

Expand
by
Default:

If a default/blank option does not exist for pick lists and radio button sets, a default/blank option will be added to the top of the lists. This allows a Visitor to leave the default option selected in order to ignore a field if he/she does not want to filter that field.

Check this if you want the advanced search area to be expanded when the Visitor first visits this Page, in order to draw attention to it. This prevents the Visitor from having to click the toggle to expand the advanced search. If you check this, the expand by default setting for the browse feature will be disabled because both areas cannot be expanded at the same time.

Layout of fields in advanced search

Use this rich-text editor in order to define the layout for the advanced search fields. You will want to include a label for each field and then copy a field from the lists above and paste into the layout. You can use a table in order to align multiple fields. You will also want to include a submit button, and optionally a clear button, which you can also copy from the lists above.

You may add additional properties to any field. The available properties appear below. "name" is the only required property.

Use this to add a CSS class to a field.

class	Example: <code>{{name: 'example', class: 'example'}}</code> Set this property to "false" to hide format instructions for date fields and etc. The available values are "true" and "false". Help is set to "true", by default. Do not wrap value in quotes.
help	Example: <code>{{name: 'example', help: false}}</code> Use this to set the label for submit and clear buttons. By default, the submit button label is set to "Search" and the clear button label is set to "Clear".
label	Example: <code>{{name: 'submit_button', label: 'Submit'}}</code> Use this to set the name for the field that you want the Visitor to be able to search. This is the only required property.
name	Example: <code>{{name: 'example'}}</code> Use this property to customize the filter for a field. The available operators appear below. "contains" is the default.

Layout:

operator	<ul style="list-style-type: none"> • contains • does not contain • is equal to • is not equal to • is less than • is less than or equal to • is greater than • is greater than or equal to
----------	--

For example, if your Form List View is showing a list of apartments and you want Visitors to be able to enter a square footage range that they are interested in, you could enter the following in your layout.

From `{{name: 'square_footage', operator: 'is greater than or equal to'}}` to `{{name: 'square_footage', operator: 'is less than or equal to'}}` sq. ft.

size	Use this to set the size of a field. This property only applies to fields that appear as text boxes and pick lists. For text boxes, the size affects the width of the field. For pick lists, the size affects the height. If this property is not set, then it will use the size value from the Custom Form Field property. Do not wrap value in quotes.
------	--

Example: `{{name: 'example', size: 40}}`

Allow Visitor to browse data

Check this to display a pick list that will allow Visitors to browse data by Custom Form Fields. The pick list will contain a list of Custom Form Fields that you may select below. Once the Visitor selects a Custom Form Field, a list of available browse filters will appear in columns in a table in alphabetical order. The browse filters that appear are all of the unique values that exist in Submitted Forms for that field. The Visitor can then click on a browse filter in order to filter the Submitted Form results that appear on this Page.

Enable Browse:	The label for the fields in the pick list comes from the label for the corresponding Custom Form Field. If a colon appears on the end of the label, then it is removed.
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The order of the fields in the pick list is defined by the order for the fields in the Custom Form. You will have to reorder the fields in the Custom Form to affect their order in the pick list.

A field will not appear in the pick list if there are no browse filters for that field (i.e. no values

appear in Submitted Forms for that field).

Only values for a field that exist in Submitted Forms will appear as browse filters. For example, if there is an option in a pick list field that has not been selected for any Submitted Forms, then it will not appear as a browse filter.

Although you may enable both browse and search, the Visitor must choose between browsing and searching at any given time. The Visitor may not combine browsing with searching.

Select a browse field that you want to be selected by default when a Visitor first visits this Page, in order to draw attention to it. This will expand the browse area by default. You may leave this pick list unselected if you do not want the browse feature to be expanded by default. Please be aware that you must also check the corresponding field in the "Select fields" area down below. Also, a value must exist for the selected field in at least one Submitted Form (i.e. the field cannot be left blank in all Submitted Forms if you want this feature to work).

NOTE: If you select an option for this field, the expand by default setting for the advanced search feature will be disabled because both areas cannot be expanded at the same time.

Expand by
Default:

TIP: You also can create a link to this page, using query string parameters, in order to set a browse field and filter by default:

```
/pages/[page name]?[page id]_browse_field_id=[field id]&[page id]_browse_filter=[filter]
```

Replace [page name] with the Page name. Replace [page id] with the Page id. You can get the Page id, by editing the page properties and looking in the address bar. Replace [field id] with the Custom Form Field id. You can get the Custom Form Field id by editing the field in the Custom Form and then looking in the address bar. Replace [filter] with the browse filter value.

Check the fields that you want to include in the browse pick list.

The columns field allows you to set the maximum number of columns that you want the browse filters to appear in. If the browse filters tend to be long, then you might want fewer columns, however if the browse filters are short, then you might want more columns. Please be aware that the value you enter for this field is the maximum number of columns, so fewer columns might appear in some situations.

Select Fields:

Check the shortcut check box if you want the browse filters for that field to link directly to the Submitted Form on the Form Item View Page instead of refreshing this Form List View Page and showing the result. The shortcut will only be used if there is only one result for the browse filter. You must set a Form Item View on the Edit Page Properties screen for this Form List View Page in order for the shortcut to work.

Text area fields with rich-text editor enabled and information fields will not appear in the list, because they are not valid browse fields.

Show all results before Visitor filters results by browsing or searching

Show Results by
Default:

If you want Submitted Forms to appear in a list on this Page before the Visitor browses or searches, then check this check box. If you leave this field unchecked, then the Visitor will receive a message when they first visit the Page that instructs the Visitor to first browse or search. Once the Visitor browses or searches, then results will appear.

Form View Directory Page Type

Form View Directory Page Type displays information about multiple Form List Views on one Page. There is an optional summary area which will show the most recent, most viewed, and most active Submitted Forms. Below the summary area, is a list of all selected Form List Views along with data for each one (i.e. number of Submitted Forms, number of Comments, number of views, last updated time). If you have many forums that use different Custom Forms and Views, this Page Type can be useful for listing all of your forums together on one Page.

Here are the Page Type Properties available to this Page Type:

Form List Views:	Select the Form List Views that you want to appear in the Form View Directory. For each Form List View, you should enter a Name (e.g. Movies) and select the Subject field, which is the field from the Custom Form that contains a brief summary.
Display Summary:	Check this field in order to have a summary with most recent, most viewed, and most active Submitted Forms appear on the top of the Page.
Date Range:	Enter the number of days from the current date that you want the summary to use in order to determine which Submitted Forms are the most recent, most viewed, and most active.
Maximum Number of Results:	Enter the maximum number of Submitted Forms that should appear for each summary.
Form List View Heading:	Enter the column heading that should describe the Form List View names. For example, if the Form List Views are all forums, then you may enter "Forum".
Subject Heading:	Enter the column heading that should describe the Submitted Form subjects. For example, if the Custom Form has a topic field, then you may enter "Topic".
Number of Submitted Forms Heading:	Enter the column heading that should describe the number of Submitted Forms for each Form List View. For example, if the Form List Views are all forums, then you may enter "Topics".

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Catalog Page Type

The Catalog Page Type is designed to allow your Customers to browse and search your online catalogs of Products and Product Groups, from a single Page.

Here are the Page Type Properties available to this Page Type:

Product Group:	<p>The Catalog Page will start with this Product Group as the parent when the Page is first displayed. Leave this field unselected if you want to start with the top-most Product Group of the website as the parent when the Page is first displayed.</p>
Enable Menu:	<p>Select this if you want a menu to appear on the Catalog page that allows Customers to quickly browse to a Product Group. All Product Groups, starting with the Product Group that was selected above, where the Display Type is "Display contents for browsing on catalog page" will be included in the menu. Products are not included in the menu.</p> <p>Select this if you want a search field to appear on the Catalog page that allows Customers to quickly find Product Groups and Products. The search feature will only search for items under the Product Group that was selected above. Also, it will only search for items that appear on Catalog Detail pages (i.e. Product Groups where the Display Type is "Display contents for selection on catalog detail page" and Products).</p>

The following fields for Product Groups and Products are searched.

- Search Keywords
- Name/ID/SKU
- Short Description
- Full Description
- Details
- Web Browser Keywords

Enable Search:	<p>The fields above are listed in order of importance in determining search relevance, from most important to least important. For example, if the search feature finds a match in Search Keywords for Product A and a match in Details for Product B, then Product A will appear in the search results before Product B, because Search Keywords is more important than Details. In order to generate a match, the keywords that the Customer enters only have to match part of the data in a field, so, for example, if a Customer searches for "shirt" and a Product contains "t-shirt" for Search Keywords, then that will result in a match.</p>
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TIP: If you want to improve the quality of the search results for your Customers we recommend that you add Search Keywords to your Product Groups and Products that match the types of keywords that your Customers might enter to find a Product.

If the search feature finds a match for a Product that is in a Product Group, where the Display Type is "Display contents for selection on catalog detail page", then the Product Group will appear in the search results instead of the Product.

If a Product Group or Product has Search Keywords, then the keywords will be displayed on the Catalog Detail Page with links to search results for each keyword, even if search is disabled for the Catalog Page. If you want to fully disable search then you should uncheck this check box and remove search keywords from Product Groups and Products.

Number of Featured Items:	<p>Specify the maximum number of featured Product Groups and Products to display. You may set the value to 0 to disable this feature. Featured items are set on the Edit Featured & New Items screen in the Commerce tab.</p>
Number of New Items:	<p>Specify the maximum number of new Product Groups and Products to display. You may set the value to 0 to disable this feature. New items are set on the Edit Featured & New Items screen in the Commerce tab.</p>

Number of Columns:	Specify the number of columns to display the children Products & Product Groups found within the parent Product Group.
Image Width:	Specify the width that each thumbnail image generated for each Product & Product Group displayed. TIP: For the best thumbnail rendering, make the Image Width evenly divisible by 2 in relation to the original Product & Product Group images.
Image Height:	Specify the height that each thumbnail image generated for each Product & Product Group displayed. TIP: For the best thumbnail rendering, make the Image Height evenly divisible by 2 in relation to the original Product & Product Group images.
Back Button Label:	Specify the text that will be displayed to the "Back" button on the Page.
Catalog Detail Page:	Sometimes browsing a Catalog is all you need your Customers to do. However, if you want to allow your Customers to also purchase online, you will need to connect your Catalog Page to a Catalog Detail Page. This will allow them to reach the Add to Cart features.

Setting up a Catalog

The Catalog Page is a powerful feature that lets your Customers browse and search an unlimited number Product Groups and Products. All the display and navigation is built-in, so you don't have to create a Page for each and every Product and Product Group. Instead, a single Catalog Page can list and navigate through an unlimited number of Product Groups and Products.

Browsing a Catalog: When you create a Catalog Page, you specify the starting, or parent Product Group. Product Groups for Products are like Folders are to Pages. You can place children Product Groups and Products into a parent Product Group. This relationship is used by the Catalog Page to first display the parent Product Group and then allow the Customer to drill down into it's children Product Groups and Products. If you want to change the way a Catalog Page navigates or the Products it displays, simply move the Products and Product Groups around. *You must have Commerce Manager rights to do this.*

Buying from a Catalog: When you create a Catalog Page, you can optionally specify a Catalog Detail Page. If you do this, the Customer will be able to not only browse the Catalog, but also add any Products in the Catalog to their Cart.

TIP: Since the logic that drives the browsing/buying is defined within each Catalog Page, you can create unlimited Catalog Pages, each with different features. If you then put these Pages into access-controlled Folders, you can create catalogs for different audiences. For example, a catalog for public shopping, and a private catalog for members or resellers only, and even a catalog unique to a specialized customer.

TIP: You can also use a Catalog Page to create a dynamically changing catalog of media! To do this, simply create a Product for each media item, set it's Price to \$0.00, and set it's Selection Type to "Donation". This will suppress the ecommerce features for the Page.

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Catalog Detail Page Type

The Catalog Detail Page Type is designed to allow your Customers to view and/or add any Product found in a catalog to their Cart from a single Page.

Catalog Detail Pages display dynamic Product data and therefore must be displayed by a Catalog Page using the Catalog Page's "Catalog Detail Page" property.

Here are the Page Type Properties available to this Page Type:

Allow customer to add product to order:	<p>Check this if you want to allow the Customer to order Products from this page. If you uncheck this then the Customer will only be able to view Product information.</p> <p>TIP: If you have a catalog of items that are not meant to be ordered online, then you should uncheck this field.</p>
Add Button Label:	<p>If "Allow customer to add product to order" is selected, then specify the text that will be displayed on the "Add" to Cart button.</p>
Next Page:	<p>If "Allow customer to add product to order" is selected, then specify the Page to send the Customer to after they click on the "Add" to Cart button.</p>
Back Button Label:	<p>TIP: Typically this is the Shopping Cart Page or Express Order Page.</p> <p>Specify the text that will be displayed on the "Back" to Catalog Page button.</p>

TIP: You can also use a Catalog Detail Page (in conjunction with a Catalog Page) to create a dynamically changing catalog of media! To do this, simply create a Product for each media item, set it's Price to \$0.00, and set it's Selection Type to "Donation". This will suppress the ecommerce features for the Page.

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Express Order Page Type

This Page Type is provided so that you can combine the functionality of the Shopping Cart, Billing Information, and the Order Preview Pages all in one Page, for a fast checkout process.

This combined checkout page is ideal if you are not shipping products, but are collecting payments for softgoods like donations, memberships, downloads, and recurring services fees. Although shipping will also be handled from this page, it will be a disconnect for your customers because it will take them "backwards" to collect the shipping information.

The way to use this Page Type is to link to it directly from your Order Forms using the "Next Page" field. Then you can link this Page Type to an Order Receipt Page using the "Next Page" field as well.

NOTE: Since this Page Type displays sensitive payment information, any Page using this Page Type it will be switched into Secure Mode automatically (<https://>) when rendered to encrypt all communications in accordance with PCI Compliance. This requires that an SSL Certificate must be installed on this web server for your domain before you can collect payments online. Please contact your hosting provider for more information and Site Settings for more information on enabling Secure Mode.

Here are the Page Type Properties available to this Page Type:

Shopping Cart Label:	This label allows you to customize the system messages displayed for this page. TIP: You only need to place one or two words here. For example, if you are creating a retail storefront, you might want this label to be "Gift Bag". Then when your shopping cart is empty, the message "Your Gift Bag is Empty." would be displayed.
Quick Add Label:	Enter text that you wish to display as the label for the Up-sell boxed area at the top of this page. You must specify the Quick Add Product Group to display the label and the boxed area.
Quick Add Product Group:	Select an optional Product Group if you wish to add to the Up-sell boxed area that will appear at the top of this page.
Shipping Address & Arrival Page:	Enter the Shipping & Arrival Page that you want the Customer to be directed to go if there are ANY Products in the cart that are "shippable".
Offer Code Label:	Enter the label for the Offer field that is displayed at the bottom of this page. The default is "Promotion Code".
Offer Code Message:	Enter the text message that will appear to the right of the Offer Code field at the bottom of this page.
Custom Field #1 Label:	If you would like to include a custom field to be completed during the order process, enter the label for the field. The data collected from this custom field will be stored in the Order and available in order reporting and order exporting. To make this field required before the Page (and the Order) can be submitted, select "Required" next to the label. Leave this field label blank to hide the field from the Page.
Custom Field #2 Label:	If you would like to include a custom field to be completed during the order process, enter the label for the field. The data collected from this custom field will be stored in the Order and available in order reporting and order exporting. To make this field required before the Page (and the Order) can be submitted, select "Required" next to the label. Leave this field label blank to hide the field from the Page.
Enable PO Number:	If you would like to include a non-required Purchase Order field on the Page, select this box. The data collected from this custom field will be stored in the Order and available in order reporting and order exporting.
Card Verification Number Page:	Enter the Page that you wish to have a Page pop-up in a new window when the "what's this?" link is clicked next to the Credit Card verification Number field in the Payment Information area.
Offline Payment	When "Allow Offline Payments" is enabled in the Site Settings this field will be used as the

Label:	offline payment option name when outputting the available payment methods.
Terms Page:	Enter the Page that you wish to have a Page pop-up in a new window when the terms link is clicked next to the Acceptance of Terms check box. This linked terms page allows you to legally charge a payment card, even if the shipment or services are delayed (since the terms can specify it). You might include your cancellation, refund, and/or return policies in this pop up page.
Update Button Label:	Enter the text you wish to display on the "Update" button. This button will recalculate the total, apply Offers if any and display the results
Purchase Now Button Label:	Enter the text you wish to display on the "Purchase Now" Button. When this button is pressed, the payment gateway (if enabled) will be securely connected and the transaction will be processed.
E-mail Order Receipt:	Check this check box if you want to e-mail an order receipt to the Customer. The commerce e-mail address in the site settings, along with BCC e-mail addresses from ordered Products will be BCC'd on the e-mail. The from name will be the organization name in the site settings. The from e-mail address will be the support e-mail address from the site settings.
Subject:	Enter a subject for the e-mail. The order number will be automatically added to the end of the subject you enter here.
Format:	Select whether you want the order receipt e-mail to contain plain text or HTML. Plain text is a simpler format that does not contain styling or images. HTML is a format like a webpage. If you select HTML, you will be asked to select the Page that you want to send.
Header:	If you select plain text for the format, then you may enter content here that will appear at the top of the e-mail.
Footer:	If you select plain text for the format, then you may enter content here that will appear at the bottom of the e-mail.
Page:	If you select HTML for the format, then you must select an Order Receipt Page that will be e-mailed. The Page you select here may be different from the Next Page below. For example, you might want to create an Order Receipt Page that has a smaller design that will work better for e-mail.
Next Page:	Select the Order Receipt Page that you want the Customer to be directed to when the Purchase Now Button is clicked.

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Order Form Page Type

The Order Form Page displays one or more Products and an "Add to Cart" button. It can display one or more Products in different ways.

Here are the Page Type Properties available to this Page Type:

Product Group:	The group of Products that will be displayed by the system on this page. (See Product Groups).
Product List Layout:	List - This option displays all the Products in the selected Product Group in long form, much like a traditional order form. Drop-Down List - This option displays all the Products in the selected Product Group in short form, much like a traditional product page. (See Products).
Continue Button Label:	Enter the text you wish to display for the clickable Continue button. The Continue button redirect the Customer to the Next Page without adding any product(s) selected to the Shopping Cart.
Submit Button Label:	Enter the text you wish to display for the clickable Submit button. The Submit button redirect the Customer to the Next Page after adding the product(s) selected to the Shopping Cart.
Next Page:	The Page that you want the system to go when the Submit Button is clicked. You can go to another Order Form Page, or to the Shopping Cart page, or any other Page on your site - depending on your needs.

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Shopping Cart Page Type

The Shopping Cart Page totals all Product items for the current Customer and applies any discounts or Offers to the Order subtotal. The Customer can update quantities and remove items from their cart, enter and apply Offers, add any qualifying Up-Sell Offers to their cart, bookmark the Saved Cart link, or start the secure Checkout process.

Here are the Page Type Properties available to this Page Type:

Update Button Label:	Enter the text you wish to display on the "Update" button. This button will recalculate the total, apply Offers if any and display the results. This label allows you to customize the system messages that are displayed for this Page.
Shopping Cart Label:	TIP: You only need to place one or two words here. For example, if you are creating a retail storefront, you might want this label to be "Gift Bag". Then whenever an empty shopping cart is displayed, the message "Your Gift Bag is Empty." would be displayed to the Customer.
Quick Add Label:	Enter text that you wish to display as the label for the Up-sell boxed area at the top of this page. You must specify the Quick Add Product Group to display the label and the boxed area.
Quick Add Product Group:	Select an optional Product Group if you wish to add to the Up-sell boxed area that will appear at the top of this page.
Offer Code Label:	Enter the label for the Offer field that is displayed at the bottom of this page. The default is "Promotion Code".
Offer Code Message:	Enter the text message that will appear to the right of the Offer Code field at the bottom of this page.
Update Button Label:	Enter the button label for the Update button that will recalculate the totals on this page when pressed by the Customer.
Checkout Button Label:	Enter the text you wish to display on the "Checkout" button.
Next Page (with shipping):	Enter the Shipping & Arrival Page that you want the Customer to be directed to when the Checkout Button is clicked. If there are ANY Products in the cart that are "shippable", the Customer will be sent to this Page.
Next Page (without shipping):	Enter the Order Preview Page that you the Customer to be directed to when the Checkout Button is clicked. If there are NO Products in the cart that are "shippable" the Customer will be sent to this Page.

TIP: If you use the Express Order Page, you don't need this Page in your checkout process.

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Shipping Address & Arrival Page Type

The Shipping Address & Arrival Page gathers the shipping address of each recipient in the Order and stores the information in the User's Address Book.

Here are the Page Type Properties available to this Page Type:

Enable Address Type:	Check this box to enable the Address Type selection field. This feature is helpful if you need to know whether the shipping address entered is a residential address or a business address. The choice entered by the Shopper will be stored with the Order data.
Address Type Page:	This optional setting allows you to add field help titled "What is This?" to the Address Type field, which will be linked to the selected a Page to provide more information about this field.
Enable Custom Shipping Form:	Check this box if you want to collect a Custom Form for each recipient on this Page. This feature is helpful if you need to collect special delivery instructions or information regarding each shipment. The custom shipping form data will be stored with the completed Orders.
Form Title for Display:	This is the Title of the Shipping Form that is displayed below the Shipping Address area of this Page.
Label Column Width:	This optional setting adjusts the horizontal width (in percent) of the label column within the Custom Shipping Form area of the Page. Use this setting to improve your form's layout.
Submit Button Label:	Enter the text you wish to display on the "Submit" button.
Next Page:	Select the Shipping Method Page that the Customer will be directed to when the Submit Button is clicked.

NOTE: If you don't ship any Products, you don't need to create a Page with this Page Type.

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Shipping Method Page Type

The Shipping Method Page evaluates the Product's shipping attributes for the recipient's address against the Shipping Methods and Zones and the Requested Arrival Date to determine the available shipping methods and costs. These shipping methods are then displayed in ascending order based on cost.

Here are the Page Type Properties available to this Page Type:

Submit Button Label:	Enter the text you wish to display on the "Submit" button.
Next Page:	Select the Billing Information Page that the Customer will be directed to when the Submit Button is clicked.

NOTE: If you don't ship any Products, you don't need to create a Page with this Page Type.

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Billing Information Page Type

This Page Type collects billing information from your Customer during the checkout process.

Here are the Page Type Properties available to this Page Type:

Custom Field #1 Label:	<p>If you would like to include a custom field to be completed during the order process, enter the label for the field. The data collected from this custom field will be stored in the Order and available in order reporting and order exporting. To make this field required before the Page (and the Order) can be submitted, select "Required" next to the label.</p> <p>TIP: Leave this field label blank to hide the field from the Page.</p>
Custom Field #2 Label:	<p>If you would like to include another custom field to be completed during the order process, enter the label for the field. The data collected from this custom field will be stored in the Order and available in order reporting and order exporting. To make this field required before the Page (and the Order) can be submitted, select "Required" next to the label.</p> <p>TIP: Leave this field label blank to hide the field from the Page.</p>
Enable PO Number:	<p>If you would like to include a non-required Purchase Order field on the Page, select this box. The data collected from this custom field will be stored in the Order and available in order reporting and order exporting.</p>
Submit Button Label:	<p>Enter the text you wish to display on the Submit button.</p>
Next Page:	<p>Select the Order Preview Page that you want to send the Visitor to when the Submit Button is clicked.</p>

NOTE: This Page must be displayed in your checkout process in order to determine Tax calculations.

TIP: If you use the Express Order Page, you don't need this Page in your checkout process.

[Back to Edit Page Properties](#)

Order Preview Page Type

This Page Type is provided so that you can create your own custom Order Preview Page for your checkout process. This page displays all the subtotals and totals for the Order including optional taxes and shipping costs. Payment information is requested and stored in the User's Account and Contact. The page also requires the Visitor to check the box to agree to your terms and to complete the Order.

NOTE: Since this Page Type displays sensitive payment information, any Page using this Page Type it will be switched into Secure Mode automatically (https://) when rendered to encrypt all communications in accordance with PCI Compliance. This requires that an SSL Certificate must be installed on this web server for your domain before you can collect payments online. Please contact your hosting provider for more information and Site Settings for more information on enabling Secure Mode.

Here are the Page Type Properties available to this Page Type:

Card Verification Number Page:	Enter the Page that you wish to have pop-up in a new window when the "what's this?" link is clicked next to the Credit Card verification Number field in the Payment Information area. This optional feature will help some people that don't know where to find the Card Verification Number on their payment card.
Offline Payment Label:	When "Allow Offline Payments" is enabled in the Site Settings this field will be used as the offline payment option name when outputting the available payment methods.
Terms Page:	Enter the Page that you wish to have pop-up in a new window when the terms link is clicked next to the Acceptance of Terms check box. This approval step is required for so that payment cards can be legally charged, even if services or shipments are delayed (since the terms can specify it). You might include your cancellation, refund, and/or return policies in this pop up Standard Page.
Submit Button Label:	Enter the text you wish to display on the "Purchase Now" Button. When this button is pressed, the payment gateway (if enabled) will be contacted securely and the transaction will be processed.
E-mail Order Receipt:	Check this check box if you want to e-mail an order receipt to the Customer. The commerce e-mail address in the site settings, along with BCC e-mail addresses from ordered Products will be BCC'd on the e-mail. The from name will be the organization name in the site settings. The from e-mail address will be the support e-mail address from the site settings.
Subject:	Enter a subject for the e-mail. The order number will be automatically added to the end of the subject you enter here.
Format:	Select whether you want the order receipt e-mail to contain plain text or HTML. Plain text is a simpler format that does not contain styling or images. HTML is a format like a webpage. If you select HTML, you will be asked to select the Page that you want to send.
Header:	If you select plain text for the format, then you may enter content here that will appear at the top of the e-mail.
Footer:	If you select plain text for the format, then you may enter content here that will appear at the bottom of the e-mail.
Page:	If you select HTML for the format, then you must select an Order Receipt Page that will be e-mailed. The Page you select here may be different from the Next Page below. For example, you might want to create an Order Receipt Page that has a smaller design that will work better for e-mail.
Next Page:	Select the Order Receipt Page that you want the Customer to be directed to when the Purchase Now Button is clicked.

TIP: If you use the Express Order Page, you don't need this Page in your checkout process.

[Back to Edit Page Properties](#)

Order Receipt Page Type

This Page Type displays the successful acceptance of the Order, and shows all the Order details, time and date stamp, and the unique order number. This Page Type can also be e-mailed to the Customer and optionally to any other person on your staff.

Here are the Page Type Properties available to this Page Type:

Product Description Type:	Select whether you want the full description or short description for Products to appear. The full description is generally large and contains HTML, so it is better for webpages. The short description is generally smaller and contains plain text, so it is better for e-mails.
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[Back to Edit Page Properties](#)

Affiliate Sign Up Form Page Type

This Page Type is provided so that you can use the automated Affiliate Program features that are built into the system. This page allow you to customize the signup process. Before you begin, you need to refer to the Site Settings help regarding enabling the Affiliate Program and it's options before accepting affiliate applications on your website.

Here are the Page Type Properties available to this Page Type:

Terms Page:	The Page that they must have read and agreed to before the Affiliate Sign Up Form Page can be submitted.
Submit Button Label:	Enter the text you wish to display for the clickable Submit button.
Next Page:	The Page that you want the system to go to when the Submit Button is clicked. This is typically a confirmation page that you can create using the Affiliate Sign Up Confirmation Page Type to provide them with a confirmation of the information they entered.

Setting up an Affiliate Program

In order for Affiliates to refer business to your website and receive a commission, they need to create their own unique Affiliate Code first. This code can be entered into the Offer Code field in a Shopping Cart or Express Order page, or can be added to a coded link that their own site Visitors will click to get to your website. This personalized Affiliate Code is selected by each Affiliate when an affiliate signs up and is approved.

Here is how it works:

1. Enable the Affiliate Program properties in the Site Settings.
2. Add a link to the Affiliate Sign Up Form Page to any Page on your website.
3. When an interested affiliate comes across your Affiliate Sign Up Form, they will fill it out. They will be asked to login or register first (since we need to create a User account for them),
4. Once the affiliate has submitted the form, they will then be shown the Affiliate Confirmation Page, where you can tell them what your next steps might be (approval process requires, time frames, etc).
5. If "Automatically Approve Affiliates" is not enabled in Site Settings, then the Site Administrator will be notified of the submitted application and pending approval request via e-mail. A link in the e-mail will direct the Site Administrator to approve or reject the affiliate by selecting the "Approved" check box found on the Affiliate's Contact.
6. If approval is granted, or if "Automatically Approve Affiliates" is enabled, the affiliate will be sent the Affiliate Welcome Page immediately, which will also include the unique Affiliate Code they specified, along with a link to your website, and any other information you wish to add to the Affiliate Welcome page. The Affiliate Code will be active once approved, so so will the optional Group Offer if specified in Site Settings before the affiliate signed up.

NOTE: You can always change or remove an affiliates status or percentage by editing the Affiliate Information section of the Contact associated with their User account. If you are using the Group Offer feature, you can also remove/change/add that offer for any affiliate by editing the Key Codes under the Commerce tab.

[Back to Edit Page Properties](#)

E-Mail a Friend Page Type

This Page Type offers your site Visitors with a way of e-mailing any Page to their friends or colleagues.

To use this feature, simply Create a Page with this Page Type, and create a link to the Page on any Page's content like:

`/pages/email_a_friend`

TIP: To add this feature to many Pages, add the link to a Common Region.

When the link is clicked, a form is displayed that prompts the Visitor to enter some required(*) and optional fields so that an e-mail can be sent to the friend. A copy of the e-mail can also be sent to the Visitor if requested. When submitted, the Page is sent via e-mail.

NOTE: For privacy reasons, the e-mail address(es) are not saved.

Here are the Page Type Properties available to this Page Type:

Submit Button Label: Enter the text you wish to display on the "Submit" button.

Next Page: Select the Page on the website to direct the Visitor to when the Submit Button is clicked.

SPAM Protection

Spammers use unprotected web forms in an attempt to use another's website to post and broadcast their own advertising. To combat this malicious technique, if CAPTCHA is enabled in the Site Settings then all Email-a-Friend Pages have a CAPTCHA feature that is automatically enabled if the Page is displayed to any site visitor that is not logged into the website. The CAPTCHA asks a simple challenge question that the visitor must answer correctly in order to submit the web form.

[Back to Edit Page Properties](#)

All My Archived Pages

This screen displays all the archived Pages that you have access to. Archived Pages will not appear for selection in any pick lists, and they may only be viewed by Users with edit rights to the Page. Pages are archived automatically when their Folder is archived.

My Home Pages

This screen displays all the Pages that you have access to that also have been selected as a "Home" Page.

Home Pages are retrieved automatically whenever your website's root (i.e. <http://www.mydomain.com/>) is requested. You do not need to create an index.html page. Instead, you can designate any Page to be your Home Page.

TIP: If you have enabled the Home Page feature for multiple Pages, each Home Page will randomly be selected and displayed each time a Visitor requests your website. This is useful if you want to rotate content on your website's home page.

To set up a Page as a Home Page, edit the Page's Properties and select the "Home Page" option.

My Searchable Pages

This screen displays all the Pages that you have access to that also have the "Include in Search" option selected.

Searchable Pages will be searched by the built-in Site Search and displayed on the Search Results Page if a match is found.

NOTE: Only Pages that the searcher has "view" access to will be displayed in the search results, so it is safe to enable this Page option with Membership and Private Pages.

To include a Page in the Site Search, edit the Page's Properties and select the "Include in Search" option.

My Unsearchable Pages

This screen displays all the Pages that you have access to that have the "Include in Search" deselected.

Unsearchable Pages will NOT be searched by the built-in Site Search feature and will not be displayed on the Search Results Page.

To exclude a Page from Site Search, edit the Page's Properties and deselect the "Include in Site Search" option.

TIP: If the Visitor or User using the Site Search feature will only be able to see results for Pages that they have "view" access to, so you can also hide Pages from the search results by moving them into restricted Folders (Membership or Private).

My sitemap.xml Pages

This screen displays all the public Pages that you have access to that have "Include in sitemap.xml" selected. These Pages will appear in the sitemap.xml file so search engines can find them. To include a Page in the sitemap.xml file, edit the Page's Properties and select the "Include in sitemap.xml" option.

My RSS Enabled Pages

This screen displays all the Pages that you have access to that also have RSS enabled.

RSS is a web content syndication format, and its name is an acronym for Really Simple Syndication. The pages listed here will broadcast an RSS feed. RSS allows site visitors to be informed when content changes on your website. A Page has to be either a Form List View, Calendar View, Catalog, Catalog Detail, or Order Form Page Type, and it has to be in a Public Folder. RSS is enabled for these Pages automatically.

Channel Title and Description

The content for the Channel Title and Description elements is determined in different ways, depending on the Page Type (see below). Fields are listed in the order that they are looked at for a value. If a field does not have a value, then the next field in the list is looked at.

For Form List View, Calendar View, and Order Form Page Types:

- Channel Title: Page's Web Browser Title.
- Channel Description: Page's Web Browser Description.

For Catalog and Catalog Detail Page Types:

- Channel Title: Product Group's Web Browser Title, Product Group's Short Description, Page's Web Browser Title.
- Channel Description: Product Group's Web Browser Description, Product Group's Full Description (converted to plain text), Page's Web Browser Description.

Form List View Pages

Up to 50 of the most recent Submitted Forms are available, based on the RSS Element fields defined in the Custom Form. NOTE: In order for RSS to be enabled for a Form List View Page, there has to be at least one RSS Element defined in the Custom Form fields associated with the Form List View Page.

The RSS feature will use the Form Item View page property from the Form List View in order to determine which page to link each RSS item to. If the Form List View field is left unselected, then the RSS feature will attempt to find the correct Page by looking for a link in the layout of the Form List View.

Calendar View Pages

The soonest 50 upcoming Events across all Calendars displayed on the Page are included in the RSS feed. RSS item elements found in the Calendar View Page feeds are:

- Item Category: Calendar's Name.
- Item Title: Calendar Event's Name.
- Item Description: Calendar Event's Short Description.

Catalog, Catalog Detail, and Order Form Pages

All Products that exist in the current Product Group will appear as items in the feed. For Catalog pages, Products from all levels of the Catalog will appear in the feed, starting from the Product Group that is currently being viewed. Please be aware that an RSS link will not appear on a Catalog Detail Page that is showing a Product, instead of a Product Group.

RSS item elements found in these feeds are listed below. The fields are listed in the order that they are looked at for a value. If a field does not have a value, then the next field in the list is looked at.

- Item Title: Product's Web Browser Title, Product's Short Description.
- Item Description: Product's Web Browser Description, Product's Full Description (converted to plain text and only used if it is not the same as the Short Description), Parent Product Group's Web Browser Description, Parent Product Group's Full Description (converted to plain text).

TIP: You can use an RSS feed for Catalog, Catalog Detail, and Order Form Pages to create a Data Feed for importing into other systems such as Google Merchant Center, allowing prospects to better find your Products through search engines and other public websites.

My Standard Pages

This screen displays all the Pages that you have access to that also are defined as "Standard" Page Types.

Standard Pages are the most common type of Pages, and simply contain content, without any interactive features.

To create a Standard Page, create a Page and set the Page's Page Type Property to "Standard".

My Photo Gallery Pages

This screen displays all the Pages that you have access to that also are defined as "Photo Gallery" Page Types.

The Photo Gallery Page will create proportional thumbnail images to your specifications for all "Albums" and "Photos" that are inside of the same Folder as the Photo Gallery Page.

To create a Photo Gallery Page, create a Page and set the Page's Page Type Property to "Photo Gallery". Create a new Folder to hold your Photo Gallery and move the Page into that Folder. Then upload your Photo Files into the same Folder.

You can also create sub-Folders within the Photo Gallery Page's Folder. These Folders will be displayed as "Albums" on the Photo Gallery Page, and the viewer will be able to click into the "Album" to view the photos inside of it.

My Calendar Pages

This screen displays all the Pages that you have access to that also are defined as "Calendar View" and "Calendar Event View" Page Types.

Calendar Pages display all the published Events for one or more Calendars.

Calendar View Pages

Calendar View Pages work with submitted Calendar Events. Calendar Views allow you to filter and display Events from one or more Calendars, and the Visitor can select the date range, overlay all Calendars, and select a monthly or weekly view.

Calendar Event View Pages

Calendar Event View Pages display the full details of a single Calendar Event. These optional Pages must be displayed by linking to them from an Event on a Calendar View Page, since the link to the Event is generated by the system.

To create a Calendar Page, create a Page and set the Page Type Property to "Calendar View" or "Calendar Event View". You can create as many Calendar Pages as you need.

RSS-Enabled Calendars

RSS is enabled automatically for any Calendar Page that is in a Public Folder. When enabled, the soonest 50 upcoming Calendar Events across all Calendars displayed on the Page are included in the RSS feed. RSS Elements found in the Calendar feeds are:

- Channel Title: Page's Web Browser Title.
- Channel Description: Page's Web Browser Description.
- Item Category: Calendar's Name.
- Item Title: Calendar Event's Name.
- Item Description: Calendar Event's Short Description.

iCalendar

Calendar Item View Page visitors can export calendar events to their desktop calendar application such as Microsoft Outlook. On every Calendar Event View Page there will be an "iCalendar" link, and when clicked it will download an ICS file to their local computer and import this ICS file into their desktop calendar application.

My Custom Form Pages

Custom Form Page Types allow you to create and collect custom forms like: event registrations, product registrations, surveys, sales and support inquiries, request forms, and many others.

Custom Form Page Types collect data from your website Visitors, assign a Reference Code to it, and store the data securely in the website's database as a Submitted Form.

Custom Form Pages

This Page Type will allow you to create your own custom form to collect data from site Visitors.

Custom Form Confirmation Pages

This Page Type provides a way to display a newly submitted form's data to the Submitter as a receipt confirmation, along with a time and date stamp and a unique reference code.

To create any of these Page Types, click on "Create Page" or view an existing Page and click "Duplicate Page".

My Form View Pages

Form View Pages are ideal for creating directory pages, event registration lists, media archive pages, and just about any other view that you can dream up.

Custom Form View Page Types work with submitted data that is collected from Custom Form Pages. Form View Pages allow you to filter and display submitted data in many different ways. All this without requiring any custom database programming.

TIP: Form List Views and Form Item Views have fully customizable data layouts, so you can limit the data that is displayed. Also, by securing these Pages into Folders, you can also limit who can see the data displayed.

Form List View Page

Form List View Page Type displays one or more rows of submitted data collected from a single Custom Form. You can define the layout of the data, any filters, and the sort order of the displayed data. This Page Type would be used as a listing, or directory page, for example.

Form Item View Page

Form Item View Page Type displays a single row of data collected from a single Submitted Form. You can define a layout for the fields you want to display. Not all data collected on a form must be visible, you can decide which item's are visible and even mask or hide some fields.

Form View Directory Page

Form View Directory Page Type displays information about multiple Form List Views on one Page. There is an optional summary area which will show the most recent, most viewed, and most active Submitted Forms. Below the summary area, is a list of all selected Form List Views along with data for each one (i.e. number of Submitted Forms, number of Comments, number of views, last updated time).

TIP: If you have many forums or blogs on your site, the Form View Directory Page Type is useful for listing them all together on one Page.

To create any of these Page Types, click on "Create Page" or view an existing Page and click "Duplicate Page".

My Commerce Pages

Designed to model the "real world" of transaction processing that exist in the off-line world, the system goes beyond traditional on-line catalog sales and shopping cart functionality.

By creating multiple Commerce Pages and link them together, you can build your own unique order processes for a variety of transactions.

Shopping & Browsing

Catalog Page

This Page Type displays thumbnails of product categories and allows Visitors to "drill down" into unlimited Product Groups, without leaving the Page.

Catalog Detail Page

This Page Type displays photos, information, pricing, and the "add to order/cart" features for any Product referenced by a Catalog Page.

Creating an Order/Cart

Order Form Pages

This Page Type displays a group of Products in a few different ways and the "add to order/cart" features.

Traditional Checkout

Shopping Cart Pages

This Page Type displays all the Products and recipients in their Cart, calculates any discounts, displays subtotals, and allows the Customer to update their items, enter an offer code, or checkout.

Shipping Address & Arrival Pages

This Page Type collects shipping addresses and optional arrival dates for each recipient.

Shipping Method Pages

This Page Type displays the available shipping options and their fees to the Customer for each recipient.

Billing Information Pages

This Page Type collects the Customer's billing information for the Order.

Order Preview Pages

This Page Type displays the order details and totals, and collects the payment method from the Customer. It also provides the "purchase" button to finalize and complete the Order.

One Page Checkout

Express Order Pages

This Page Type combines the functionality of the traditional checkout process:

Shopping Cart Page > Shipping/Arrival Page > Shipping Method Page > Billing Information Page > Order Preview Page

into a single Page, so you can offer fast, one-step checkouts.

Order Complete

Order Receipt Pages

This Page Type displays the successful acceptance of the Order, and shows all the Order details, time and date stamp, and the unique order number. This Page can also be e-mailed to the Customer and optionally to any other person on your staff.

Post Order

View Order Page

This Page Type displays a previously submitted Order, and offers the User the opportunity to reorder (fill their Cart with it's items).

IMPORTANT:You should only have one Page with this Page Type on your website.

Update Address Book Page

This Page Type allows the User to update the shipping addresses captured during previous checkout sessions.

IMPORTANT:You should only have one Page with this Page Type on your website.

Sales Affiliate Program

Affiliate Sign Up Form Page

This Page Type collects all necessary information to process an Affiliate sales representative for your website.

IMPORTANT:You should only have one Page with this Page Type on your website.

Affiliate Sign Up Confirmation Page

This Page Type is displayed when the Affiliate Sign Up Form is submitted and provides a receipt confirmation for the Affiliate.

IMPORTANT:You should only have one Page with this Page Type on your website.

Affiliate Welcome Page

This Page Type will be e-mailed automatically to the Affiliate once they have been approved. It contains a self-generated tracking code that will track all on-line sales and commissions for the Affiliate.

IMPORTANT:You should only have one Page with this Page Type on your website.

To create any of these Page Types, click on "Create Page" or view an existing Page and click "Duplicate Page".

My Account Pages

These Page Types allow you to define My Account features for each User. This information is dynamically presented to the User that is logged in when the Page is viewed. This information is used to pre-fill other Page Types such as the Commerce Page Types and the Custom Form Page Types. All information that a User can manage themselves is accessible from this Page.

The system will display the first Page of each of these Page Types that it finds, so you should only have one Page in your the system with this Page Type! If any of these Page Types are missing from your website, a default page will be displayed for the Page Type so that your website will continue to function.

These Page Types provided so that you can create your own custom to display the User's stored information, including:

- Username
- Start Page
- Reward Points
- Membership Information
- Contact information
- Billing information
- Address Book information
- Incomplete Orders (Saved Carts)
- Completed Orders (Order History)
- Affiliate Information & Commissions

The My Account page is a smart page, and displays only the information that applies to the User or the Site Settings in general. For example:

- If the User has Reward Points (greater than zero), then they will be displayed.
- If the User has a Start Page defined, then a link to that page will be displayed.
- If the User is a an approved Affiliate, this page will display their Affiliate Code, Commission Rate, and Commission amounts.
- If the User is a Member, then this page will display their Member ID and Expiration Date.
- If the User has used any of the e-commerce features, then any Saved Carts and Order History for the User are displayed.
- If the Site's Settings Page has "multi-recipient" shipping enabled, then the User's Address Book of recipients will be available. If not, then the Address Book functionality will be hidden since it is irrelevant.

My Account Page

This Page displays the User's Personal Contact Information and links to the other account pages: My Account Profile, Email Preferences, View Orders, and Change Password. If any commerce features have been used, any Saved Carts, Order History, and Shipping Address Book is displayed.

NOTE: You only need to link to the My Account Page. All other account page types are automatically linked to this Page.

My Account Profile Page

This Page Type is provided so that you can create your own custom Page to allow Users to update their Contact/Billing information.

Change Password Page

A Change Password Page presents a form that allows a logged in User to change their password.

E-Mail Preferences Page

This Page Type is provided so that you can create your own custom Page to allow Users to update their e-mail address and e-mail subscriptions. This Page displays a selection check box to the User to indicate whether they wish to receive ANY e-mail from subscriptions available to them.

A User can deselect this global opt-in/opt-out setting for their User Account to refuse any e-mail regardless of whether they have previously signed up for e-mail in the past. If the User selects the checkbox, then they are eligible to receive e-mails from any group that they are a member of. They can opt-in and opt-out of any subscription at any time.

A subscription is like a mailing list. Subscriptions can be "open" or "closed". Open subscriptions allow Users to opt-in and opt-out at any time through this Page Type. Closed subscriptions are used to create mailing lists where the Users must be added to the subscription by a Site Editor (an employee mailing list would be a good example of a closed subscription). For more information, please refer to Contact Groups.

Update Address Book Page

This Page Type is provided a way for your Customers to add and update their shipping addresses. These addresses are collected whenever they complete an Order and are used to pre-fill shipping addresses for future orders.

View Order Page

This Page Type provides a way for your Customers to view their submitted Orders. Customers can also find shipping tracking codes (if available) to track shipments and view split shipments (see View Order under Commerce to add these values for any order) from this page as well as reorder the same products and services from the previous Order.

To create any of these Page Types, click on "Create Page". You should only have one Page with these Page Types on your website.

My Login Pages

These Page Types are used to manage the registration, login, change random password, and logout processes for the website.

Registration Entrance Page

This Page Type is provided so that you can create your own custom Register/Login page that will be displayed automatically to any Visitor attempting to access a Page or File that has been restricted (placed in a Folder that is either a Guest Access or Registration Access Folder).

Registration Process: When a Visitor attempts to access a Page or File that has been restricted, the Registration Entrance Page is displayed. If the Visitor has not registered on the website before, they will be asked to do so now. When the Visitor registers successfully, a User Account and a corresponding Contact is created for them. If the optional Registration Contact Group is specified in Site Settings, their newly created Contact is also placed in that Contact Group. Then the newly registered User is logged in and directed to the Registration Confirmation Page, where the registration process continues.

Login Process: When a returning User (who has previously registered) attempts to access a Page or File that has been restricted, the Registration Entrance Page is displayed. The Visitor enters their Username and Password, is logged in, and directed to the restricted Page or File. The login process is complete.

TIP: You do not need to link to this Page directly. However, if you want to send your returning Registered Users directly to their own Start Page upon login, simply create a link directly to the Registration Entrance Page, and they will be directed to the Start Page defined in their User account.

Registration Confirmation Page

This Page Type is provided so that you can create your own custom Registration Confirmation Page that will be displayed automatically after a successful User registration. This Page will also be emailed to the Registration E-mail Address in the Site Settings so that someone on your staff can be alerted about the registration.

The Registration Confirmation Page displays a "Continue" button. When pressed by the now Registered User, the User is directed to the restricted Page or File. The registration process is now complete.

Membership Entrance Page

This Page Type is provided so that you can create your own custom Membership Register/Login page that will be displayed automatically to any Visitor attempting to access a Page or File that has been protected (placed in a Membership Access Folder).

Membership registration is different than (guest) registration. Membership registration requires that the Visitor know their Member ID BEFORE they attempt register.

Member Registration Process: When a Visitor attempts to access a Page or File that has been protected, the Membership Entrance Page is displayed. If the Visitor has not registered on the website before, they will be asked to do so now. In order to register, the Visitor will need know their Member ID, provided to them off-line, prior to this moment. When the Visitor registers successfully, a User Account is created and connected to their existing Contact. If the optional Membership Contact Group is specified in Site Settings, their newly created Contact is also placed in that Contact Group. Then the newly registered Member User is logged in and directed to the Membership Confirmation Page, where the membership registration process continues.

Member Login Process: When a returning Member User (who has previously registered as a member) attempts to access a Page or File that has been protected, the Membership Entrance Page is displayed. The Member enters their

Username and Password, is logged in, and directed to the protected Page or File. The login process is complete.

TIP: You do not need to link to this Page directly. However, if you want to send your returning Members directly to their own Start Page upon login, simply create a link directly to the Membership Entrance Page, and they will be directed to the Start Page defined in their User account.

Membership Confirmation Page

This Page Type is provided so that you can create your own custom Membership Confirmation Page that will be displayed automatically after a successful Member registration. This Page will also be emailed to the Membership E-mail Address in the Site Settings so that someone on your staff can be alerted about the new Member.

The Membership Confirmation Page displays a "Continue" button. When pressed by the now Registered Member, the Member User is directed to the protected Page or File. The membership registration process is now complete.

Login Page

This Page Type is provided so that you can create your own custom Login Page that will be displayed automatically when a Visitor attempts to access a private Page or File (located in a Private Folder), or access the Control Panel.

Private Page or File: When a User attempts to access a private Page or File, the Login Page will be displayed and the User will be prompted to login. If they login successfully, they will be directed to the private Page or File they were attempting to access. This also occurs any My Account Pages are accessed.

Accessing the Control Panel: When a User with management privileges, or a Site Manager, Site Designer, or Site Administrator attempts to login to the Control Panel, the Login Page will be displayed and the User will be prompted to login. If they login successfully, they will be directed to the Welcome Page. However, if a Start Page is defined for the User, they will be directed to that Page instead.

Accessing their Start Page: If you create a link directly to the Login Page, when a User clicks this link, the Login Page will be displayed and the User will be prompted to login. If they login successfully, they will be directed to the Start Page defined for their User Account.

TIP: Use the Start Page feature for your staff Users so when they login, they can always go to their Start Page, which can be the home page of your private staff portal.

TIP: If you don't want to provide Login capabilities from any Page, your Site Designer can add a Login Region to any of your Page Styles.

Logout Page

This Page Type is provided so that you can create your own custom Logout Page. When this Page is viewed, the current User will be logged out instantly. A link to the Login Page is also displayed.

Forgot Password Page

This Page Type is provided so that you can create your own custom Forgot Password Page. This Page presents the Visitor with a form to enter their User account e-mail address. If the e-mail address matches a User account, then the User account's Password Hint is displayed (if not blank). If the User is unable to remember their password from the Password Hint (if enabled), then the User account password is reset and a temporary password is e-mailed to the User account holder.

NOTE: Using the Password Hint feature makes User accounts less secure so you should use caution if you enable this feature. You can disable this feature for all Users in the Site Settings. You can also disable the forgot Password link from all Login Pages in the Site Settings.

Change Random Password Page

This Page Type is provided so that you can create your own custom Change Random Password Page. This Page Type is displayed immediately after a successful login has occurred using a temporary password. This Page prompts the User to enter a new password of their choosing. This practice keeps passwords secure since only the User knows what it is, passwords are never transmitted via e-mail, and passwords are encrypted when stored.

NOTE: The first Page of each of these Page Types that is found within your website will be displayed (be sure to place them all in a Public Folder). If any of these Pages are found missing from your website, a default page will be displayed for each Page Type so that your website will continue to function correctly, but no Page Style will be used (no branding). To create any of these Page Types, click on "Create Page". You should only have one Page with of each of these Page Types on your website.

Affiliate Pages

You can turn any User into a sales affiliate and assign commissions for Orders placed by Customers passed to your website from your affiliate's websites, using a built-in tracking code system.

Affiliate Sign Up Form Page

This Page Type is is an Affiliate Sign Up Form (application).

Affiliate Sign Up Confirmation Page

This Page Type is used to display a confirmation message, including the information that the Affiliate submitted on the previous page (Affiliate Sign Up Page) and an explanation of your Affiliate approval process (if not automatic).

Affiliate Welcome Page

This Page Type is used to display the Affiliate's Code that i created automatically when the Affiliate's Sign Up Form is approved. This page will be e-mailed to the Affiliate as soon as they have been approved. You can use this Page Type to display any follow up information about your Affiliate Program that would be helpful to the new Affiliate.

To create any of these Page Types, click on "Create Page". You should only have one Page with these Page Types on your website.

My Miscellaneous Pages

The following Page Types are included in this category: E-mail a Friend, Error, Folder View, and Search Results.

Search Results Page

This Page Type displays the search results from the Site Search feature. Links to Pages are displayed, along with each Page's Title and Description. If any Pages use the "Promote on Keyword" feature, then these Pages will be listed at the top of the Search Results Page. Also, if Search Products is enabled in the page properties, then Product Groups and Products will also appear in the search results.

You can create multiple Search Results Pages. For example, you might want different Search Results pages to have different designs or properties. You can link to Search Results pages or create a search form where the action for the form points to the page.

NOTE: Only "searchable" Pages are included in the Search Results Page, and of those Pages, only Pages that the searcher has access to will be visible.

Error Page

This Page Type is used for displaying error messages. For example, if a visitor requests a Page or File that no longer exists, then the visitor will be sent to this Page Type and an error will appear. You do not need to link to this Page Type directly. It will be displayed automatically when required.

IMPORTANT: You should only have one Page with this Page Type on your website.

Folder View Page

The Folder View Page will list Folders, Pages, and Files that are inside of the same Folder as the Folder View Page and that the Visitor has access to. This Page Type is useful when you want to give your Visitors or Users a dynamic list of the content that they have access to. For example, you might want to use this Page Type for an intranet that shows private Pages that a User has access to.

For some of these Page Types, the first Page that is found will be displayed if the page cannot be determined. If any of these Pages are missing from your website, a default page will be displayed for each Page Type so that your website will continue to function correctly.

To create any of these Page Types, click on "Create Page".

My Public Access Pages

These Pages have been placed in a Public Folder, accessible by any site Visitor or User.

TIP: If you are developing your website and don't want your website "viewable" to the public until you officially launch, you can change the top-level Folder from Public to Private. This will make all website Pages protected from access by any Visitor or User that does not have "view" rights to the top-level Folder. Remember, if you do this, you will not be able to test any registration processes since they are never displayed to Users who are already logged into the website.

To create a Public Access Page, simply move any Page into a Public Folder.

My Guest Access Pages

These Pages have been placed in a Guest Folder, which provides you an easy way of prompting your site Visitors to register with the website before proceeding on the the Page they requested.

Whenever a site Visitor attempts to access a one of these Guest Pages, and they are not logged in, the Registration Entrance Page will be displayed, and they will be given the option to register, login, or continue on to the Guest Page they requested.

To create a Guest Access Page, simply move any Page into a Guest Folder.

My Registration Access Pages

These Pages have been placed in a Registration Folder, which provides you an easy way of prompting your site Visitors to register with the website before proceeding on the the Page they requested.

Whenever a site Visitor attempts to access a one of these Pages, and they are not logged in, the Registration Entrance Page will be displayed, and they will be required to either register or login, before continuing on to the Page they requested.

To create a Registration Access Page, simply move any Page into a Registration Folder.

My Membership Access Pages

These Pages have been placed in a Membership Folder, which provides you an easy way of prompting your site Visitors to register as a member with the website before proceeding on the the Page they requested.

Whenever a site Visitor attempts to access a one of these Membership Pages, and they are not logged in, the Membership Entrance Page will be displayed, and they will be given the option to register as a member (requires a valid Member ID), or login before continuing on to the Membership Page they requested.

To create a Membership Access Page, simply move any Page into a Membership Folder.

TIP: To get new Members to register, create any Page, (typically you would use it as the landing page for your Members), move it to a Membership Folder, and place a link to this Page on your public website. Then when a new or unregistered Member clicks on the link to access the Member's area of your website, they will be prompted to register as a Member. Remember to send your Members their Member ID first (or you can have the system assign one if you require them to purchase their membership using the Commerce Pages).

My Private Access Pages

These Pages have been placed in a Private Folder, which provides you an easy way of prompting your site Visitors to login with the website before proceeding on the the Page they requested.

Whenever a site Visitor attempts to access a one of these Private Pages, and they are not logged in, the Login Page will be displayed, and they will be prompted to login before continuing on to the Private Page they requested. If they do not have "View" rights to the Private Folder where the Private Page resides, they will be denied access and the Error Page will be displayed with that message.

To create a Private Access Page, simply move any Page into a Private Folder.

My Short Links

This screen displays all the Short Links that you have access to. A Short Link allows you to specify an alias for a Page, Product Group, or Product. It is ideal for marketers that need a create a short, easy-to-remember link for their advertisements. For example, a Short Link named "bigevent" could be added, making it possible to advertise a link to a Page in your promotional materials as "example.com/bigevent".

You can also create Short Links for Product Groups and Products so that you can give a short address (e.g. example.com/widget) to people which will forward to the item on a Catalog or Catalog Detail Page.

You can setup multiple Short Links for the same Page, Product Group, or Product. This allows you to setup a new Short Link for an item and not break previous Short Links.

For each Short Link you have the option of adding a tracking code so that the system will remember that a Visitor came from that Short Link. Tracking codes can then be viewed in various areas of the system (e.g. Visitor/Order reports). This allows you to setup marketing campaigns and do A/B testing. For example, you could setup two Short Links that forward to the same Page, Product Group, or Product (e.g. example.com/campaign1 and example.com/campaign2) and then determine which campaign was more effective.

You have access to Short Links for all Pages that you have edit rights to.

Short Links will not break when the names for Pages, Product Groups, and Products are changed. However, Short Links will be deleted when the corresponding Page, Product Group, or Product is deleted.

Create/Edit Short Link

This screen displays a Short Link and its properties.

Name:	Enter the name for the Short Link (no spaces please). This will be the name in the address that you give to people. This must be unique. The name is not case-sensitive, so if the name is "example", then Visitors will be able to access the Short Link at both "example" and "Example".
Destination Type:	Select the type of item that you want the Short Link to forward to.
Page/Catalog Page/Catalog Detail Page:	Select the Page that you want the Short Link to forward to. If the Short Link is forwarding to a Page, then select any Page. If the Short Link is forwarding to a Product Group, then you should either select a Catalog Page or a Catalog Detail Page, based on where you want the Product Group to appear. If the Short Link is forwarding to a Product, then select a Catalog Detail Page.
Product Group:	If you selected "Product Group" for the Destination Type, then select the Product Group that you want the Short Link to forward to.
Product:	If you selected "Product" for the Destination Type, then select the Product that you want the Short Link to forward to.
Tracking Code:	<p>You have the option of adding a tracking code so that the system will remember that a Visitor came from that Short Link. Tracking codes can then be viewed in various areas of the system (e.g. Visitor/Order reports). This allows you to setup marketing campaigns and do A/B testing. For example, you could setup two Short Links that forward to the same Page, Product Group, or Product (e.g. example.com/campaign1 and example.com/campaign2) and then determine which campaign was more effective.</p> <p>If a tracking code appears in the address (e.g. example.com/short_link?t=tracking_code), then it will override the value that you enter in this field.</p>

All My Files

This screen displays all the Files that you have access to, except archived Files (see All My Archived Files).

Viewing & Editing Files

You can view and edit any File you have access to by selecting the File from any of the Files screens, which are grouped by File Type. Some of the File's properties are also visible.

NOTE: Design Files are displayed in a light gray color. If you are a Site Designer, then you can click on the filename as a shortcut to access the Design File directly from this screen.

Searching Files

You can enter a search term in the box on this screen and search for any File by its properties. (File content is excluded from the search).

Modifying Files

You can modify the Folder and design property, if you are a Site Designer, for one or more Files by selecting the Files you wish to modify and clicking "Modify Selected". Since access control is handled by the File's Folder, modifying the File allows you to easily protect a File.

WARNING: Since changing a File's Folder affects its access control, you can accidentally make a Private File accessible or a Public File inaccessible to others attempting to view the File. Keep this in mind when moving Files among Folders.

Creating Files

To create a File, click on "Upload Files".

Deleting Files

To delete a File from the web server, select the File you wish to delete and click "Delete Selected".

NOTE: If you delete a File, any links or references to the File will need to be updated.

WARNING: Take care when deleting Files, there is no undo.

Upload Files

Upload a file to the web server from your local computer.

Select New/Replacement File to Upload

Local File: Choose the file to upload. This can be done by either typing in the directory path or by clicking "browse" and then browsing to the desired file location on your local computer.

File Access Control

Folder: This is the Folder that the file will be placed in. The Folder's access control will dictate who can view or download the File.

Check if File is a Design File that is Managed by Site Designers

Design: This property only appears for Site Designers. You can use this property to set whether this File is a Design File or not. Design Files may only be edited or deleted by Site Designers in order to prevent the design of a website from being accidentally altered. If you upload a zip file and extract it, then your selection for this field will be applied to all of the extracted files.

File Description / Photo Gallery Caption

File Description: Enter a description for this File. If you are going to include this File in a Photo Gallery, this is the caption that will appear below the Photo. It also appears for Folder Views.

WARNING: Text you enter here may be seen on your website if this image is selected for a Photo Gallery or this file appears in a Folder View so please keep that in mind.

Clicking "Upload" to send the file from your local computer up to the web server. Please be patient, large files may take a few minutes.

NOTE: There is no maximum file size that can be uploaded, however, success will depend on your own Internet connection speed at the time of the upload, and any file size limitation that your hosting provider sets on your hosting account. If you receive an error, we recommend trying the upload at a less busy time of day or trying the upload with a smaller file.

Edit File

Edit a File to the web server. Here are the File Properties:

File Name

You can change the name of the File on the web server.

Name:

WARNING: If you change the File's name, any links or references to the File will need to be updated, so take great care in renaming Files.

File Access Control

Folder:

This is the Folder that the file will be placed in. The Folder's access control will dictate who can view or download the File.

Check if File is a Design File that is Managed by Site Designers

Design:

This property only appears for Site Designers. You can use this property to set whether this File is a Design File or not. Design Files may only be edited or deleted by Site Designers in order to prevent the design of a website from being accidentally altered.

File Description / Photo Gallery Caption

File

Description:

Enter a description for this File. If you are going to include this File in a Photo Gallery, this is the caption that will appear below the Photo. This is also displayed next to Files in Folder Views.

WARNING: Text you enter here may be seen on your website if this image is selected for a Photo Gallery or this File appears in a Folder View so please keep that in mind.

All My Archived Files

This screen displays all the archived Files that you have access to. Archived Files will not appear for selection in any pick lists. Unlike archived Pages, archived Files can still be viewed by anyone, depending on access control. Files are archived automatically when their Folder is archived.

My Document Files

This screen displays all the document type Files that you have access too that have been previously uploaded on the the server. This includes any File that is not an image file type.

Examples of Document Files:

- Word Processor Files
- Spreadsheet Files
- Presentation Files
- PDF Files
- Zip Files

To create a new File, click on "Upload Files". If you want to upload many Files at one time, pack them into a single ZIP file and upload the zip file. the system will ask you if you want to unpack it.

My Photos

This screen displays all photos (or image files) that you have access too that have been previously uploaded on the the server.

This includes the following formats:

BMP Format

BMP The BMP format is an image file format used to store bitmap digital images especially on Microsoft Windows. It is supported by most popular web browsers, but not widely used on websites.

These image files have the extension .bmp.

Graphics Interchange Format

GIF Compuserve's 8-bit GIF format is ideal for small navigational icons and simple diagrams and illustrations where accuracy is required, or graphics with large blocks of a single color. GIF images can also be animated.

These image files have the extension .gif.

Joint Photographic Experts Format

JPG JPEG it is the most common format for storing and transmitting photographic images on the World Wide Web. It is supported by most popular web browsers.

These image files have the extension .jpg or .jpeg.

Portable Network Graphics Format

PNG Portable Network Graphics (PNG) was created to improve upon and replace GIF as an image-file format. It is supported by most popular web browsers.

These image files have the extension .png.

Tagged Image File Format

TIF Tagged Image File Format is a file format for storing images, including photographs and line art. It is supported by most popular web browsers.

These image files have the extension .tif or .tiff.

TIP: You can easily embed any Photo directly into a Page using the Rich-text Editor. If you do this, you don't need to upload your File first.

TIP: If you are creating a Photo Gallery, create a Folder first to hold each gallery, then upload all the gallery photos into the Folder.

To create a new File, click on "Upload Files". If you want to upload many Files at one time, pack them into a single ZIP file and upload the zip file. the system will ask you if you want to unpack it.

My Media

This screen displays all multi-media files that you have access too that have been previously uploaded on the the server.

This includes the following formats:

AIFF Format

The AIFF (Audio Interchange File Format) was developed by Apple.

AIFF

AIFF files are not cross-platform and the format is not supported by all web browsers.

Sounds stored in the AIFF format have the extension .aif or .aiff.

AU Format

AU

The AU format is supported by many different software systems over a large range of platforms.

Sounds stored in the AU format have the extension .au.

AVI Format

The AVI (Audio Video Interleave) format was developed by Microsoft.

AVI

The AVI format is supported by all computers running Windows, and by all the most popular web browsers. It is a very common format on the Internet, but not always possible to play on non-Windows computers.

Videos stored in the AVI format have the extension .avi.

Flash Video Format

The Flash Video Format was developed by Macromedia.

FLV

Flash Video format requires an extra component to play. This component comes preinstalled with the latest versions of Netscape and Internet Explorer.

Videos stored in the Flash Video format have the extension .flv.

MPEG Format

MPG

MPEG

The MPEG (Moving Pictures Expert Group) format is the most popular format on the Internet. It is cross-platform, and supported by all the most popular web browsers.

Videos stored in the MPEG format have the extension .mpg or .mpeg.

QuickTime Format

The QuickTime format is developed by Apple.

MOV

QuickTime is a common format on the Internet, but QuickTime movies cannot be played on a Windows computer without an extra (free) component installed.

Videos stored in the QuickTime format have the extension .mov.

MIDI Format

The MIDI (Musical Instrument Digital Interface) is a format for sending music information between electronic music devices like synthesizers and computer sound cards.

MID

The MIDI format is supported by many different software systems over a large range of platforms. MIDI files are supported by all the most popular Internet browsers.

Sounds stored in the MIDI format have the extension .mid or .midi.

MP3 Format

MP3 files are actually MPEG files. But the MPEG format was originally developed for video by the

Moving Pictures Experts Group. We can say that MP3 files are the sound part of the MPEG video format.

MP3 MP3 is one of the most popular sound formats for music recording. The MP3 encoding system combines good compression (small files) with high quality. Expect all your future software systems to support it.

Sounds stored in the MP3 format have the extension .mp3, or .mpga (for MPG Audio).

RealAudio Format / RealVideo Format

The RealAudio format was developed for the Internet by Real Media. The format also supports video.

RM The format allows streaming of audio (on-line music, Internet radio) with low bandwidths. Because of the
RAM low bandwidth priority, quality is often reduced.

The format allows streaming of video (on-line video, Internet TV) with low bandwidths. Because of the low bandwidth priority, quality is often reduced.

RealAudio / RealVideo format have the extension .rm or .ram.

SND Format

The SND (Sound) was developed by Apple.

SND SND files are not cross-platform and the format is not supported by all web browsers.

Sounds stored in the SND format have the extension .snd.

Shockwave (Flash) Format

The Shockwave format was developed by Macromedia.

SWF The Shockwave format requires an extra component to play. This component comes preinstalled with the latest versions of Netscape and Internet Explorer.

Videos stored in the Shockwave format have the extension .swf.

WAVE Format

The WAVE (waveform) format is developed by IBM and Microsoft.

WAV It is supported by all computers running Windows, and by all the most popular web browsers.

Sounds stored in the WAVE format have the extension .wav.

Windows Media Audio Format

The Windows Media Audio format is an audio format developed by Microsoft.

WMA WMA is designed to handle all types of audio content. The files can be highly compressed and can be delivered as a continuous flow of data (on-line radio). WMA files can be of any size, and be compressed to match many different bandwidths (connection speeds).

Audio stored in the Windows Media format have the extension .wma.

Windows Media Format

The Windows Media format is developed by Microsoft.

WMV Windows Media is a common format on the Internet, but Windows Media movies cannot be played on non-Windows computer without an extra (free) component installed. Some later Windows Media movies cannot play at all on non-Windows computers because no player is available.

Videos stored in the Windows Media format have the extension .wmv.

To create a new File, click on "Upload Files". If you want to upload many Files at one time, pack them into a single ZIP file and upload the zip file. the system will ask you if you want to unpack it.

TIP: You can easily embed any Media File directly into a Page using the Rich-text Editor. If you do this, you don't

need to upload your File first.

My Attachments

This screen displays all the Files that have been uploaded as a result of a Submitted Form or Comment.

NOTE: File Attachments are given special consideration and therefore will not appear for selection in any pick lists within the Control Panel.

IMPORTANT: Attachment files are deleted automatically from the web server if their associated Submitted Form or Comment is deleted.

My Public Access Files

These Files have been placed in a Public Folder, accessible by any site Visitor or User.

To create a Public Access File, simply move any File into a Public Folder.

My Guest Access Files

These Files have been placed in a Guest Folder, which provides you an easy way of prompting your site Visitors to register with the website before proceeding on the the File they requested.

Whenever a site Visitor attempts to access a one of these Guest Files, and they are not logged in, the Registration Entrance Page will be displayed, and they will be given the option to register, login, or continue on to the Guest File they requested.

To create a Guest Access File, simply move any File into a Guest Folder.

My Registration Access Files

These Files have been placed in a Registration Folder, which provides you an easy way of prompting your site Visitors to register with the website before proceeding on the the File they requested.

Whenever a site Visitor attempts to access a one of these Files, and they are not logged in, the Registration Entrance Page will be displayed, and they will be required to either register or login, before continuing on to the File they requested.

To create a Registration Access File, simply move any File into a Registration Folder.

My Membership Access Files

These Files have been placed in a Membership Folder, which provides you an easy way of prompting your site Visitors to register as a member with the website before proceeding on the the File they requested.

Whenever a site Visitor attempts to access a one of these Membership Files, and they are not logged in, the Membership Entrance Page will be displayed, and they will be given the option to register as a member (requires a valid Member ID), or login before continuing on to the Membership File they requested.

To create a Membership Access File, simply move any File into a Membership Folder.

My Private Access Files

These Files have been placed in a Private Folder, which provides you an easy way of prompting your site Visitors to login with the website before proceeding on the the File they requested.

Whenever a site Visitor attempts to access a one of these Private Files, and they are not logged in, the Login Page will be displayed, and they will be prompted to login before continuing on to the Private File they requested. If they do not have "View" rights to the Private Folder where the Private File resides, they will be denied access and the Error Page will be displayed with that message.

To create a Private Access File, simply move any File into a Private Folder.

My Calendars

This screen displays all the Calendars that you have access to. You can create an unlimited number of Calendars for any type of organization. Calendars are managed by Calendar Managers, so you can delegate the control of each Calendar to a specific User.

Viewing Calendars

Click on the Calendar you wish to view.

Creating Calendars

If you have access to create a Calendar, click "Create Calendar" which will be visible on this screen.

Deleting Calendars

If you have access to delete a Calendar, click "Edit Calendar Properties" and then click "Delete".

TIP: To protect you from accidentally deleting all the Calendar Events, a confirmation warning message will be displayed if you attempt to delete a Calendar without first deleting all the Calendar's Events. If you see this message, you must first delete all of the Calendar's Events before you can delete the Calendar.

NOTE: If you delete a Calendar, it will no longer appear on any Calendar Pages that might have referenced it.

Create/Edit Calendar

You can view and add Calendar Events to your Calender from this screen.

Non-published Calendar Event is are hidden from all Calendar Pages and are marked with an asterisk next to the Event Title (*).

TIP: If you manage more than one Calendar, select "-All-" from the "Calendar" pick list to overlay all your Calendar Events.

Creating Calendar Events

To create a Calendar Event, click "Create Calendar Event".

Create/Edit Calendar Properties

This screen displays the Calendar's one property, it's name.

New Calendar Name

Enter the name of this Calendar.

Calendar
Name:

NOTE: You can change this name at anytime, and it will have no affect on any Calendar Pages that reference it. However, keep in mind that this name will be visible to anyone that can view it's Calendar Page, if the Page displays more than one Calendar.

TIP: If you want to restrict edit access to this Calendar, you need to create a User with Calendar Management access to this Calendar. If you want to restrict view access to this Calendar, you need to move the any Calendar Page that refers to this Calendar into a protected Folder.

Create/Edit Calendar Event

This screen displays the Calendar Event's details. You can update this event at any time to change what information is displayed on any Calendar Pages that reference this event's Calendar.

Event Name

Name: The name or title of the Event. This text will be displayed on any Calendar View Pages that reference this Event.

TIP: It is a good idea to keep this text short, or at least use shorter words in the name if possible, so that it will wrap well in case it is displayed in a small area of a Page.

Event Date(s) & Time(s)

Start Date & Time: This is the start date and time that the Event will begin. For recurring Events, this is the first occurrence.

End Date & Time: This is the end date and time that the Event will end. For recurring Events, this should be the end of the first occurrence only.

If the Event is non-recurring, leave these fields blank. If you would like this Event to recur on the Calendar, select the number of times the Event will repeat and how often.

Recurrence:

NOTE: When creating recurring events that span several days make sure that the recurrence frequency does not allow any overlap in the event dates.

Select this check box if you want to display the time of the Event.

Show Time:

TIP: This is useful to disable if you have an all-day, or all-week event and the actual start and end time of the Event is not relevant.

Event Details

Short Description: This is the short description of the Event that is displayed on it's Calendar View Page if the weekly listing format is selected.

Full Description: This is the full description of the Event that is displayed on it's Calendar Event View Page if you need to explain the Event in detail, add a map to the location, etc.

Event Location(s)

Locations: Select all of the locations where the Event will take place.

Post to any of my Calendars

Calendars: Select the Calendars that this Event will be posted too.

Select this check box if you are ready to display this Event on it's Calendar Pages.

Publish to Calendar Pages: This field will only appear for Users who have been given access to publish Calendar Events.

NOTE: You can change this at any time. It is effective as soon as you save this screen.

Display Special Notes on any Calendar Event Pages

If you would like to include special event notes for your event or facilities staff, enter them here. Special Event Notes are only displayed on Calendar Event View Pages that have their "Show Notes" property enabled.

Special Event Notes:

TIP: To use this feature, create a Calendar Event View Page that is located in a Private Folder so that only authorized Users can view the Page (and therefore the notes displayed on the Page).

Reservations

Accept Reservations: Select this option if you want to sell reservations for this Event.

Select this option if you want each recurring instance of this Event to have it's own

inventory limit. (In other words, not share it's remaining spots with all instances). This option provides an easy way for you create only a small number of recurring Events to manage a large number of individual reservations.

Manage Reservations Separately for each Recurring Instance:

TIP: This feature would be enabled if you were accepting hourly reservations for the use of courts at a sports practice facility, or booking appointments for professional services.

TIP: This feature would be disabled if you were accepting registrations for a instructional course that has a student limit. The class might meet over several weeks (hence a recurring event), but the course as a whole is still limited to a certain number of students.

Select this option if you want to limit the number of reservations that you can sell to this Event*. This is important for Events where seating is limited. Leave this option deselected if you want to accept any number of reservations. This option can be enabled/disabled at any time.

Limit Reservations:

NOTE: If more than one Visitor has added the last remaining spot(s) into their cart, the first Visitor to complete their purchase will get the spot(s). The other Visitors will see the 'No Longer Available Message' instead.

*IMPORTANT: If you need multiple Events to share the same remaining spots, leave this option deselected, and share a single Product and it's Inventory among Events instead.

If you are limiting the number of reservations for this Event, and Manage Reservations Separately is enabled, enter the number of initial inventory for EACH instance of the recurring Event.

Initial Spots:

NOTE: For example, if you have a sports gym to rent out, and you want to allow anyone to reserve the gym each day from 1pm-4pm, you would create a recurring Event from 1pm-4pm (recurring daily for as many weeks out as you wish). The Initial Spots should be set to "1", since only 1 reservation can be accepted for each day the gym is available.

If you are limiting the number of reservations for this Event, enter the number of remaining spots available.

Remaining Spots:

This value is automatically reduced when Orders are submitted. You can adjust this value at any time to change the available inventory.

NOTE: When 'Manage Reservations Separately for each Recurring Instance' is enabled, this value will reflect the inventory available for the specific Event instance that is currently being edited.

If you are limiting the number of reservations and no more spots are available, enter the message you would like to display.

No Longer Available Message:

TIP: If you want to include a wait list feature, create a Custom Form Page to gather the wait list information from the interested Visitors, and add a link to that Page to this message.

Reserve Button Label:

Enter the text for this Event's reservation button that will be displayed whenever reservations are being accepted for this Event.

Select the Product that will be added to the Visitor's Shopping Cart when the reservation button is clicked.

Reservation Product:

NOTE: You will need to setup a Product before creating an Event that uses the Product. When the Product is added to the Shopping Cart, the Event's Name and Event Date/Time will be appended to the Product's Full Description.

Next Page:

When the reservation button is clicked, and the Event's Product is added to the Shopping Cart, the Visitor will be redirected to this page. Typically, a Shopping Cart Page is selected.

All Event Locations

This screen displays all the Event Locations.

Event Locations are shared among all Calendar Events to offer you a uniform way to specify common event locations and prevents scheduling conflicts.

Event Locations are ideal if you have meeting rooms, conference rooms, auditoriums, or other venues where events commonly occur and you need to manage scheduling conflicts.

You can add as many Event Locations as you need and use each of them when your Calendar Managers create Events.

TIP: Since Event Locations are shared across all Calendar Events that reference them, you can change the Locations name and all Events will be updated with the new name automatically.

Managing Scheduling Conflicts

Whenever an Event is created and assigned to an Event Location, the sytem automatically checks for any scheduling conflicts for the same Event Location across all Calendars. If a conflict is found, the system requests that the new Event be rescheduled and prevents it from being created.

Create/Edit Event Location

This screen displays shared Event Locations that are used to specify common locations where Events take place.

Event Location Name

Enter the name of this Event Location.

Event Location

Name:

NOTE: You can change this name at anytime, and it will automatically be updated for any Calendar Event that references it.

NOTE: Only Site Managers can create Event Locations, but all Calendar Managers share these Event Locations for their Events.

My Submitted Forms

This screen displays all the form data collected or imported from any Custom Form Pages that you have access to.

You can collect an unlimited number of Submitted Forms from any Custom Form Page.

Submitted Forms can be searched, filtered, viewed, and exported by any User that has Form Management rights to the Folder that contains the Custom Form Page (that produced the Submitted Form).

Viewing Submitted Forms

You can view any Submitted Forms that you have access to.

Creating Submitted Forms

A Submitted Form is created when a Custom Form Page is submitted successfully.

Importing Submitted Forms

You can import Submitted Forms using a simple spreadsheet file (CSV text file).

Exporting Submitted Forms

You can export Submitted Forms into a text file and view them in a spreadsheet program.

You can filter the data that you want to export by using the Search and Advanced Filters located at the top of the screen.

Once you are satisfied with the filtered form data, click the [Export Forms] button.

NOTE: You can only export Submitted Forms for a single Custom Form at a time since the column values must match in the export file for it to be useful. Also, Information fields and File Upload fields are not exported.

Deleting Submitted Forms

Select the Submitted Forms you wish to delete and click "Delete Selected".

NOTE: When you delete Submitted Forms, the associated Custom Form Page is NOT deleted.

WARNING: Take care when deleting Submitted Forms, there is no undo. Once you confirm the deletion, the form data (and any uploaded form files) are gone!

TIP: You might want to export the Submitted Forms to create a backup copy of the data before you delete it. However, exporting the data will NOT export any uploaded form files (that may have been uploaded through the Custom Form Page).

Edit Submitted Form

This screen displays a Submitted Form. You can view all of the properties and edit any of the form data.

Submitted Form Properties

This is the name of the Custom Form that this Submitted Form data is based on.

Custom Form:

NOTE: This is not the same as the name of the Custom Form Page where the Custom Form lives.

Reference
Code:

This is a unique ID that is assigned to this Submitted Form when it was stored in the database. This can be used to search and find this data, and it can also be displayed as a confirmation number to the Submitter.

Tracking Code:

If found when the Custom Form was submitted, this Tracking Code will identify what ad or landing page the Submitter found that brought him/her to the Custom Form Page.

Affiliate Code:

If found when the Custom Form was submitted, this Affiliate Code will identify any Affiliate link that the Submitter clicked on prior to submitting the Custom Form.

Referring URL:

If found when the Custom Form was submitted, this Referring URL will identify what web page the Submitter was visiting prior to submitting the Custom Form.

Member ID:

If found a Member submitted this Custom Form, their Member ID can be used to identify the Submitter.

Submitted
Date:

This is the Date and Time when the Custom Form was submitted.

Last Modified
Date:

This is the Date and Time when the Custom Form was last modified.

If you would like to specify a specific User who may edit this specific Submitted Form, even if they don't have to access to any other submitted form data, then you may enter their username in this field. Please take note of the following:

Form Editor:

- The Form Editor will only be able to edit this Submitted Form from a Form Item View Page. Control Panel access to the Forms tab is not granted.
- The Form Editor will not be allowed to delete the Submitted Form.
- The Form Editor will be notified by e-mail if/when a Comment is added to a Form Item View Page for this Submitted Form, just like the Comment Moderator.
- The Form Editor will be allowed to enter any "Added by" name when adding a Comment to a Form Item View Page for this specific Submitted Form.

TIP: This feature allows a User to have access the edit a specific Submitted Form, without having access to all Submitted Form data for a particular Custom Form.

Submitted Form Data

Custom Form
Field #1:

Listed here will be all of the Custom Form fields that this Submitted Form was based on.

Custom Form
Field #2:*

Any required fields for the Custom Form will have an asterisk() next to it and must have a value to save your edits.*

...

...

Import Submitted Forms

You can Import Submitted Form data from your local computer using a simple spreadsheet file.

The CSV text file format is a universally accepted way to move data between systems, and since most spreadsheet and database programs can import/export CSV text files, it is an ideal way to exchange data.

Select Formatted Text File to Upload

Browse and select the CSV file from your local computer that contains the Submitted Form data you wish to import.

CSV
File:

If you are creating a CSV file from a spreadsheet file, each column in the FIRST row of the spreadsheet must match a Field Name from the Custom Form. Once a field match is found, the same column for all additional rows will be imported into the database for that Field. This matching of fields continues for all columns in the first row. When complete, a new Submitted Form that will be created for each additional row of data found.

If you are importing data for a field that can contain multiple answers (i.e. pick list with multiple selection or check box), you can include multiple answers by separating them with a comma (e.g. Apple, Banana, Pear).

NOTE: The columns can be in any order. If you are saving a CSV file on a Mac, you might need to select the "Windows CSV" format in Excel.

Select the Custom Form

Custom
Form:

Select the Custom Form that contains the Form Definition (fields) that will be imported.

File Upload Fields

If the Custom Form has a file upload field, then you might want to connect the Submitted Forms to Files. First, upload all of the necessary files via the Files tab. You may upload a ZIP file in order to upload many files at once. Next, enter the file name, for each file that has already been uploaded, in the file upload field column in the CSV file. When files are uploaded into the system underscores are inserted for spaces in the file name, so make sure the file names in the CSV file are correct.

Please be aware that a Submitted Form may not be connected to a Design File or a File that is already an Attachment. Also, you must have edit access to the File's Folder in order to connect it to a Submitted Form.

Limitations when importing Submitted Forms

There are two methods for collecting Submitted Form data. The most common is to capture a Submitted Form each time a Custom Form Page is submitted through the website. The other method is to import the Submitted Form data from a file.

There are some limitations when importing Submitted Forms:

- If any Form Fields are set to "Connect to Contact", Contacts and User accounts are not updated.
- No Custom Form Page work-flow features or auto-responders are triggered.

All Visitor Reports

This screen displays all Visitor Reports created and saved by any Visitor Report Manager.

The Visitor Profile provide insight about your website visitors that is not possible with web analytics software like Google Analytics. This is because web analytics cannot co-relate the bulk of website traffic with the interactive features and work-flow built into a data-driven website.

Most website analytics programs offer you only totals: Visitors, Page Views, Top Pages, etc. What they can't tell you is what your website **audience** looks like and **how** they interact with your website.

Visitor Profiles make it easy to answer important questions like:

- What website did they come from?
- What e-mail Campaign are they responding too?
- What search what search engine referred them?
- What are they searching for?
- Which one of our ads did they click on?
- What was the last page they visited before landing on our website?
- Was it their first time at our website?
- Are they very interested in what we have to offer?
- What is the most popular landing page on our website?
- Did they submit a Custom Form?
- Did they begin an Order?
- Did they retrieve a Saved Cart?
- Did they start to checkout but never finish?
- Did they place an Order?
- Was the Customer referred to us by an Affiliate?
- What Currency did they prefer while Ordering?
- What language do they prefer while browsing?
- What is the most popular product Ordered or donation made?
- What is the most popular form submitted on our website?

Viewing & Editing Visitor Reports

Select the Visitor Report that you want to run and view.

Creating a Visitor Report

Click on "Create Visitor Report" to create a new Visitor Report.

Deleting a Visitor Report

Select the Visitor Report that you want to delete. Click "Edit Visitor Report" and then click "Delete".

NOTE: Deleting a Visitor Report does not delete any Visitor data.

Who's Online

This screen also provides setup and access to the Who's Online feature for your website. The Who's Online feature displays all site visitors who are browsing your public web pages in real-time and their worldwide geographical location.

You'll notice a small colored dot within the button. The color indicates the status of this feature as follows:

Red: The feature has not been enabled for your website yet. Click the Who's Online button to signup for a free, no obligation account with WebsiteAlive that will allow you free access to their monitoring service to track your site visitors in real-time. You only need to do this once.

Yellow: Your free account has been created successfully and page tracking will start automatically within moments. You can click on the Who's Online button at anytime to launch the Site Monitor in a new browser window. You will need to login with your Website Alive account login. Once logged in, the Site Monitor will refresh itself every several seconds and show you real-time visitor information.

If you decide later to add chat features to your website, you need to click on the Who's Online button, login to your Site Monitor account, and click on the "Add Chat..." link. You will be redirected to WebsiteAlive where you can order one of their plans. Once you order the plan, your free WebsiteAlive account will be upgraded automatically and all Chat Regions will begin to function instantly!

IMPORTANT: If you decide to upgrade to the chat feature, you **MUST** click on "Add Chat..." link **WITHIN** the Site Monitor window. If you go to the WebsiteAlive website to order without clicking the "Add Chat" link within the Site Monitor window, your chat feature will not begin to work automatically.

Green: Your free account has been successfully upgraded and the built-in chat feature is now active!

NOTE: If you don't see the Chat Button appear on your public pages immediately, be sure that you have a Chat Region defined in the Page Styles used by your Pages. Also be sure that Who's Online is enabled in Site Settings and that the Online Chat Button and/or Offline Chat Button is not set to to "-None-".

Create/Edit Visitor Report

This screen displays the Visitor Report and allows you to change the summary layout, filters, and save the Visitor Report. Each time you run a saved Visitor Report, there is no delay the data, it is always reported in real-time.

Summarizing & Filtering Visits

Visitor Reports are built based on the the four main attributes of every website visit:

Date Range	When did they arrive?
Year:	You can summarize or filter all visits by calendar years.
Month:	You can summarize or filter all visits by calendar months.
Day:	You can summarize or filter all visits by calendar days.
Site Search Terms:	You can summarize or filter all visits by what a visitor searched for on your website.
Referrals	Where did they come from?
URL:	You can summarize or filter all visits by the actual URL of the previously viewed web browser page of the Visitor. For example: "http://www.previouswebsite.com/anotherpage.html"
Host Name:	You can summarize or filter all visits by the Host Name (or Domain Name) visited before landing on your website.
Search Engine:	You can summarize or filter all visits by search engine. For example: "http://www.google.com/search?hl=en&q=keyword+phrase+here" results in the Host Name "google.com"
Search Term:	You can summarize or filter all visits by the Search Terms, or keywords and keyword phrases entered into the search bar of a search engine site that was used to find your website.
Pay Per Click / Organic:	You can summarize or filter all visits by whether the Visitors clicked on a paid ad link or a free search engine results link.
First Visit:	You can summarize or filter all visits by whether this is the first visit to your website. NOTE: A browser cookie is stored on the visiting computer so return visits won't count as first time visits.
Landing Page:	You can summarize or filter all visits by the first Page on your website that the Visitor "lands on" when entering your website.
Tracking Code:	You can summarize or filter all visits by the LAST Tracking Code that is added to any of your website links that the Visitor clicked on. For example: if you broadcast an e-mail Campaign with a link to a landing Page on your website like this: "http://www.mywebsite.com/pages/landingpage?t=12345", then the reports will show the visit as resulting from the tracking Code "12345", and this value will also be stored with any resulting Order as well.
Affiliate Code:	You can summarize or filter all visits by the FIRST Affiliate Code that is added to any of your website links that the Visitor clicked on. For example: if one of your Affiliates broadcast an e-mail Campaign to advertise your website, or added a link to advertise your website on their own website, like this: "http://www.mywebsite.com/pages/landingpage?a=98765", then then the reports will show the visit as resulting from the Affiliate Code "98765", and this value will also be stored with any resulting Order.
Actions	What did they do when they were here?
Page Views:	You can summarize or filter all visits by the number of Pages viewed by the Visitor.
Custom Forms Submitted:	You can summarize or filter all visits by whether a Custom Form was submitted (created a Submitted Form).

Custom Form Name:	You can summarize or filter all visits by the Custom Form Name submitted.
Order Created:	You can summarize or filter all visits by whether an Order was created.
Order Retrieved:	You can summarize or filter all visits by whether an Order/Cart was retrieved by a User from their My Account Page or from a Saved Cart bookmark (link).
Order Checked Out:	You can summarize or filter all visits by whether an Visitor started the checkout process.
Order Completed:	You can summarize or filter all visits by whether an Order was successfully placed.
Geographics	Where are our customers and members from?
City:	You can summarize or filter all visits by the Customer's Billing Address City.
State:	You can summarize or filter all visits by the Customer's Billing Address State/Province.
Zip Code:	You can summarize or filter all visits by the Customer's Billing Address Zip/Postal Code.
Country:	You can summarize or filter all visits by the Customer's Billing Address Country.
Currency:	You can summarize or filter all visits by the Currency that the Customer chose during the order process (if multi-currencies are enabled).
Value	How much did they spend or donate?
Total Order Amount:	You can summarize all visits by the total number of Order for any visit attribute.
Average Order Total:	You can summarize all visits by the average Order Total for any visit attribute.

TIP: Visitor Reports are shared among all Visitor Report Managers, so you can setup reports for others to run and view. However, you should also take care when editing someone else's report.

NOTE: Deleting a Visitor Report does not delete any Visitor data.

Visit Details

This screen displays the details of a single visit to the website.

General Visit Information

Visitor Number:	The unique number that identifies this visit among all visits.
Start Time:	The date and time when the visit first began.
End Time:	The date and time when the visit ended.
Currency:	If multi-currency support is enabled, this is the Currency chosen by the Visitor when they placed an Order.

Referral Information

URL:	The actual URL of the previously viewed web browser page of the Visitor. For example: "http://www.previouswebsite.com/anotherpage.html"
Host Name:	The Host Name (or Domain Name) visited before landing on your website.
Search Engine:	If visited by a popular search engine.
Search Term:	If visited by a popular search engine, this is the search terms, or keywords, entered into the search bar of a search engine site that was used to find your website.
Pay Per Click / Organic:	Whether the Visitors clicked on a paid ad link or a free search engine results link.
First Visit:	Whether this is the first visit to your website.
Landing Page:	The first Page on your website that the Visitor "lands on" when entering your website.
Tracking Code:	The LAST Tracking Code that was found on the Visitor's computer.
Affiliate Code:	The FIRST Affiliate Code that was found on the Visitor's computer.

Actions performed during Visit

Page Views:	The number of Pages viewed by the Visitor during the visit.
Custom Forms Submitted:	Whether a Custom Form was submitted by the Visitor during the visit.
Custom Form Name:	The Custom Form Name submitted during the visit.
Order Created:	Whether an Order was created during the visit.
Order Retrieved:	Whether an Order/Cart was retrieved by the User from either their My Account Page or from a Saved Cart bookmark (link).
Order Checked Out:	Whether the Visitor started the checkout process during the visit.
Order Completed:	Whether an Order was successfully placed during the visit.
Order Total:	If an Order was placed during the visit, this is the dollar amount of the Order.

Visitor's Location Information

City:	If an Order was placed during the visit, this is the Customer's Billing Address City.
State:	If an Order was placed during the visit, this is the Customer's Billing Address State/Province.
Zip Code:	If an Order was placed during the visit, this is the Customer's Billing Address Zip/Postal Code.
Country:	If an Order was placed during the visit, this is the Customer's Billing Address Country.

Miscellaneous

IP Address:	The IP Address of the computer or local network where the visit originated.
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NOTE: Any data that cannot be determined or is not applicable are intentionally left blank.

All My Contacts

This screen displays all of Contacts from every Contract Group that you have access to manage.

Contacts are much like any Address Book in other programs, and hold the basic contact information for any individual person. Contacts are organized into one of more Contact Groups.

Contacts also hold other properties that allow them to be integrated into other features of your website. Some Contacts are simply names and addresses that are stored online, while others are connected to mailing lists, Users, Members, and Affiliates. Based on the properties the Contact has, we identify them as a "Contact", "Subscriber", "Member", or an "Affiliate". Members and Affiliates will also have a User account that corresponds to their Contact.

IMPORTANT: When necessary, Contacts are automatically connected to Users, however not all Users have a contact. The User account holds the login information and access rights, while the Contact holds the individuals basic contact information for the User, along with the Membership status, and Affiliate status.

Contacts share information with their corresponding User account, and with the built-in interactive Pages like the My Account Pages, Custom Form Pages, E-mail Campaigns, and Checkout processes. These updates happen automatically by the system. For example, when a User logs in and views their My Account Page, and change their e-mail address, their User Account and their Contact are both updated with the new e-mail address.

You can move and organize Contacts into one or more Contact Groups. The built-in registration processes can place a Contact in a Contact Group, as can Custom Forms, and when completing an Order, and event when ordering a specific Product.

Filtering & Viewing Contacts

Contact screens allow you to displays any of the Contacts that you have access to. Filters allow you to narrow your view of the Contacts. The Opt-In number at the top of the view indicates how many Contacts in the view are also Subscribers.

The Date Range filter allows you to narrow your view of Contact to a specific date range when the Contacts were last modified (or created).

The Keyword Search filter allows you to search for a specific keyword throughout all the Contacts in the current view. Press "Clear" to remove the Keyword Search.

The Contact Group filter allows you to narrow your view to only a particular Contact Group. Select the Contact Group and click "Update".

TIP: Next to the Contact Group is a numeric value that indicates how many Contacts are in that Group.

The Advanced Filters will allow you to further limit the Contacts that appear in the view. Clicking "Remove Advanced Filters" will clear the Advanced Filters for the view.

TIP: To reset all the filters and display all the Contacts you have access to, click "Remove Advanced Filters" if you have Advanced Filters showing, then press "Clear" to remove any Keyword Search, and finally select the "[All]" Contact Group, and click "Update".

You can show and hide the Contact Groups for Contacts by clicking on the "Show/Hide Contact Groups" link.

Creating Contacts

Contacts can be created through the Control Panel by any Contact Manager one at a time, or they can be created

automatically by the system when a Visitor registers as a Guest or Member.

To add a Contact manually, click on "Create Contact" to create a new Contact. If you need to add many Contacts at one time, you can click "Import Contacts".

To create a Contact automatically:

- Have your Visitors register on the website (submit the Registration Entrance Page).
- Have your unregistered Members register on the website (submit the Membership Entrance Page).
- Have your Visitor submit the Contact Form widget.
- Have your Visitor submit a Custom Form Page that has an e-mail address field defined.

To understand how Contacts gets created automatically, let's walk through an example. In this example, a Visitor enters your website. They decide to register as a Guest to access some Guest Access Pages and Files. When they register, a Contact is created and linked to their User account (which is also created during registration). Their Contact will also be added to the Registered Guest Contact Group (so that they might receive your next e-mail campaign e-newsletter, for instance).

Importing Contacts

Contacts contain be imported and assigned to a Contact Group from a spreadsheet (CSV file).

You can also import Contacts for Unregistered Guests but they will still need to submit a Registration Entrance Page so that a User account can be created and they can become a Registered User and login.

You can also import Contacts for Unregistered Members (by including a Member ID field) but they will still need to submit a Membership Entrance Page so that a User account can be created and they can become a Registered Member and login.

You can also import Contacts for Unregistered Affiliates but they will still need to submit an Affiliate Sign Up Form Page so that a User account can be created. Once the approval process is complete, they will become a Registered Affiliate.

TIP: All the fields found in the Microsoft Outlook Address Book are available so you can easily import directly from and Outlook Address Book export file.

Click on "Import Contacts" to import your Contacts.

E-mailing Contacts

You can e-mail any Contact that has a valid e-mail address and has "Opt-in" status for their Contact, and any Contact Groups that they have subscribed too. To e-mail Contacts, you will need to be a Campaign Manager, and you can click on the [CAMPAIGN] tab to begin the process.

Updating Contacts

To update a Contact manually through the Control Panel, click on the Contact you wish to update.

You can also select several Contacts and set their "Opt-in" or "Opt-out" status which will affect whether they will receive any e-mail Campaigns.

NOTE: Even Contacts without User accounts can follow the "update my e-mail preferences" link in any e-mail message they receive from a Campaign and update their own e-mail address, opt-in status, and subscriptions. (However, they will not have access to any other My Account Pages until they register.)

To understand how Contacts get updated automatically, let's walk through an example. In this example, a Registered Guest (Contact has been created and linked to their User account).

- Now if the newly Registered User (our Guest) goes to their My Account Page, and changes their e-mail address and adds their contact information, this will update their e-mail address in their Contact and their User account automatically.
- Now the Guest finds a Custom Form to submit. Any fields marked "Connect to Contact" will be pre-filled with their Contact information. If they change any of the connected fields, their Contact will be updated when they submit the Custom Form. These updates will be reflected the next time they visit their My Account Pages.
- If the Custom Form Page also defined a Contact Group, their Contact will be added to the Contact Group automatically simply because they submitted the particular Custom Form Page.
- Now let's say the Guest decides to make a payment, or order something from the website. When they checkout, their billing information will be pre-filled from their Contact, which again, has their latest information. Upon completing their Order, they will again be added to another mailing lists defined by the Products ordered, and any address updates during the checkout process will be reflected in their Contact/User information. If multi-recipient shipping is enabled, all of their shipping addresses will also be added to their My Account Address Book and available to be recalled when they return again to shop.
- If the Guest goes to their E-Mail Preferences Page and adds or removes themselves from any e-mail subscriptions (mailing lists) their Contact Groups and Opt-in Status are updated in their Contact.

This is only one example of the many ways in which you can automatically updates Contacts. The good news is that you don't have to do any of this "web plumbing" yourself. the system handles all the data management for you - you just add Pages and link them together.

Organizing Contacts

Select the Contact you wish to add or remove from a Contact Group and select "Organize Contacts". This feature is only accessible when you have clicked "Show Groups" in the Contact screen heading.

Exporting Contacts

You can easily export any or all Contacts to your local computer that can be opened with a spreadsheet or word processing program.

Filter the Contacts view until you have all the Contacts you want to export, and click on "Export Contacts" to create a download text file (CSV file).

Deleting Contacts

Filter the Contacts view until you have all the Contacts you want to delete, and click on "Delete Contacts".

WARNING: When you Delete Contacts, all Contacts in the currently filtered view are deleted (even though you can only see the first screen of Contacts that will be deleted).

WARNING: Take care when deleting Contacts, there is no undo. Once you confirm the deletion, the Contact data is gone!

TIP: You might want to export the Contacts to create a backup copy of the data before you delete.

Create/Edit Contact

This screen displays a single Contact. You can view or update this Contact's information, subscriber status, member status, affiliate status, or Contact groups.

WARNING: Don't delete this Contact if it has a corresponding User account (make sure it is not also viewable in the "My Contacts by User" view).

Contact's Name		Contact's Subscriber Information	
Salutation:	Mr., Ms., Mrs., Dr., Rev., etc.	E-mail Address:	The Person's E-mail Address If selected, permission has been granted to send this person and e-mail Campaign for any subscription Contact Groups they are included in.
First Name:	First name	Opt-in:	It overrides the "Opt-in" status associated with the Contact's Contact Groups & Subscriptions settings. NOTE: For CAN-SPAM ACT compliance, the Subscriber is ultimately in control of this setting. They can securely change this setting in real-time through a specially coded link appended to all e-mail Campaigns messages they receive).
Last Name:	Last name		The Person's Last Name
Suffix:	Jr., Sr., II, III, IV, etc. (If different		The Person's Name Suffix
Nickname:	from the First Name.)		The Person's Nickname

Contact's Work Information		Contact's Home Information	
Company:	The Person's Organization Name	Home Address 1:	The Person's Home Address (Line 1)
Title:	The Person's Title	Home Address 2:	The Person's Home Address (Line 2)
Department:	The Person's Department (if necessary).	Home City:	The Person's Home City
Office Location	The Person's Office Location (if necessary).	Home State:	The Person's Home State
Business Address 1:	The Person's Business Address (Line 1)	Home Zip Code:	The Person's Home Zip/Postal Code
Business Address 2:	The Person's Business Address (Line 2)	Home Phone:	The Person's Home Phone
Business City:	The Person's Business City	Mobile Phone:	The Person's Mobile Phone
Business State:	The Person's Business State	Home Fax:	The Person's Fax Line
Business Country:	The Person's Business Country		
Business Zip Code	The Person's Business Zip/Postal Code		
Business Phone:	The Person's Business Phone		
Business Fax:	The Person's Business Fax Line		
Website:	The Person's Website		

Additional Notes

Lead Source: How this Contact was sourced.

You can include any text descriptions or notes you wish to enter for this Contact.

Description: **TIP:** If you link this field to a Custom Form (using the "Connect to Contact" feature), then this description can be updated by a Custom Form, submitted by the Contact. However, for your protection, this field will not be pre-filled by any Custom Form Pages, so that any internal staff notes are not accidentally displayed to the Contact themselves.

Membership Access

This is the Member's unique ID.

The Member ID can be set manually when you create a new Contact by clicking on "Create Contact", or when you "Import Contacts". These methods produce unregistered Members. They will still need to register themselves (complete the Membership Entrance Page) before they can login and get Membership Access.

Member ID: The Member ID can also be set automatically whenever a Registered User orders a Product (Add Days to Membership property). The Member ID is set to the Order's unique Reference Code. The Member ID can be changed from it's default value to anything else at any time. The user will have Membership Folder access immediately.

The Member ID can also be set automatically whenever a Registered User submits a Custom Form (Grant Membership Trial property). The Member ID is set to the Submitted Form's unique Reference Code. The Member ID can be changed from it's default value to anything else at any time. The user will have Membership Folder access immediately.

NOTE: If the User's Contact does not have a Member ID at any time (it is blank) they will not be able to view any Membership Folders. ANY value in the Member ID field is considered a Member and will have Membership Folder access (unless their Expiration Date has expired).

Expiration Date: This is the Member's Expiration Date. It is used to determine if the Member can view any Pages or Files in any Membership Folders each time they login. If the current web server date is greater than this date, then the Membership has expired and the User will not be able to access any Membership Folder content.

TIP: If the Member orders more days, or completes another trial custom form, the Expiration Date is brought to the current date first, then the "days" specified are applied. Using the Membership renewal notification feature in the Site Settings, it is possible to totally automate Membership sign up and renewals.

Affiliate Information

Approved: Check this box to approve this Affiliate for commission payouts. This must be selected during the time any referring Orders are placed with the Affiliate's Code for any commission to be calculated.

NOTE: The Affiliate Program must be enabled in the Site Settings.

Affiliate Name: The Name of the Affiliate (for informational purposes only).

Affiliate Code: The Affiliate Code for this Affiliate. This value is created automatically by the system when the Affiliate is first approved and e-mailed to the Affiliate using the Affiliate Welcome Page.

The Affiliate must place this code in the URL for their website and e-mail marketing, and when clicked on by a Visitors, the Affiliate will get credit for any purchases on your website.

If the Affiliate Code was "ABC123", then to activate it, your Affiliate would need to add it to a link as follows: <http://www.mywebsite.com/?a=ABC123>.

NOTE: If you must change this code for some reason, you can change it's value (not recommended) and the previous value will no longer be usable.

The Commission Rate for this Affiliate. This rate is used in the Order Commissions calculations.

Commission
Rate:

NOTE: It will be set automatically to the Default Commission Rate in the Site Settings when the Affiliate is approved. You can change this value before approving the Affiliate provided that the Affiliate Approval is not automatic in Site Settings.

Contact Groups & Subscriptions

You can place this Contact in any Contact Group that you have access to.

Contact Groups serve two purposes for the Contact. One purpose is to organize, or classify your Contacts for your own information. Another is so that you can include them in e-mail Campaigns that you send from time to time.

Contact
Group

Once you select a Contact Group for this Contact, if the Contact Group has it's "E-Mail Subscription" property set, then an additional check box appears next to the Contact Group and you can "opt-in" or "opt-out" the Contact from the Contact Group's subscription (mailing list).

NOTE: This setting is overridden by the Contact's global "Opt-in" setting (above). Also, for CAN-SPAM ACT compliance, the Subscriber is ultimately in control of this setting. They can securely change this setting in real-time through a specially coded link appended to all e-mail Campaigns messages they receive).

NOTE: It is not possible for a Subscriber to opt themselves into a "Closed" subscription Contact Group. Therefore, if you want the Contact to be included in any Campaigns for any Closed subscriptions, you will need to manually add them ("opt-in") using this screen.

Import Contacts

You can Import Contacts into your website database from your local computer any Comma Separated Values (CSV) File. CSV file format is a universally accepted way to move data between systems. Most spreadsheet programs and databases can save data as a CSV text file so it is an ideal way to upload Contacts.

Select Formatted Text File to Upload

Click on the [Browse] button to select a CSV text file from your local computer that contains the Contacts that you wish to import.

CSV File:

NOTE: You do not need to import all the available columns.

Import Options

Import all Contacts: This mode imports all Contacts found in the CSV file, regardless of whether they already exist. If the Contact already exists (determined by a matching e-mail address), the opt-in and out values are copied (preserved) from the existing Contact to the new Contact.

Import Mode: Only import Contacts with unique e-mail addresses: This mode imports ONLY the Contacts from the CSV file that contain e-mail addresses not shared by any existing Contact. This mode allows you to incrementally "overlay" new Contacts into the system without affecting any existing Contacts.

Select Contact Groups to Import into

Import into Contact Groups: Select one or more Contact Groups that you would like the Contacts to be added too.

Importing from Microsoft Outlook

You can easily import your Address Book from MS Outlook and create mailing lists for your important Contacts.

Importing from a Member Database

When importing Members, please include all Member IDs in the Member_id column.

A Member ID should be a string of characters that your the Member will know, because they will need to use them to register as Members after you have imported the unregistered Members.

Also, you may want to also include Expiration Dates in the expiration_date column.

After the Members have been imported, you should direct your unregistered Members to any Page on your website that is placed in a Membership Access Folder. When they reach this Page, the system will prompt them to register as a Member by displaying the Membership Entrance Page. They will need to know their Member ID to go beyond this Page. This step provide your members with secure login accounts for their protection.

Once the Member has successfully registered, the system will redirect them to the original Page in the Membership Access Folder you directed them too.

Importing Affiliates

You can import Affiliates and their Affiliate Codes, and Commission Rates using the Contacts Import feature.

Import from CSV file

The easiest way is to get your data into columns in a spreadsheet. You may import Contacts by uploading a CSV file. You can save a CSV file from Microsoft Excel. Here are the guidelines for the CSV file:

- The first row of the CSV file must contain the names of the columns that you wish to import data for.
- You may use any number of columns from the list below.
- Columns can be listed in any order.
- Column names must be similar to those in the list below (i.e. "first_name" or "First Name" or "FirstName" or "firstname" or etc.).
- Exported column names from Outlook are supported.
- The possible values for opt_in are "0" (Opt-Out) and "1" (Opt-In). "1" is the default.
- The possible values for affiliate_approved are "0" (not approved) and "1" (approved). "0" is the default.
- If you are saving a CSV file on a Mac, you might need to select the "Windows CSV" format in Excel.

Here is the list of the valid Contact Properties that you can import. Place one of the following on the first row of each of your data columns:

- email_address
- opt_out
- salutation
- first_name
- last_name
- suffix
- nickname
- company
- title
- department
- office_location
- business_address_1
- business_address_2
- business_city
- business_state
- business_country
- business_zip_code
- business_phone
- business_fax
- home_address_1
- home_address_2
- home_city
- home_state
- home_country
- home_zip_code
- home_phone
- home_fax
- mobile_phone
- website
- lead_source
- description
- member_id
- expiration_date
- affiliate_approved
- affiliate_name
- affiliate_code
- affiliate_commission_rate

My Subscribers

This screen displays all Contacts that have an e-mail address and are opted-in to receive e-mail Campaigns.

My Affiliates

This screen displays all Contacts that have submitted the Affiliate Sign Up Form Page and have been approved to receive commissions for online Orders.

My Customers

This screen displays all Contacts that have placed an Order.

NOTE: If the Order is deleted, this Contact will no longer show up on this screen.

TIP: You can always track your Customers using Contact Groups. Site settings and Product settings allow your Site Managers and Commerce Managers to append a new Contact Group to a Contact whenever they place an Order.

My Members

This screen displays all Contacts that have a Member ID.

The existence of a Member ID does not necessarily mean this Contact can access any Pages or Files in the Membership Folders. Each Member's Contact must still be tied to a User account before they can login and access any content that is not in a Public Folder.

If the Contact has already registered as a Guest through the Registration Entrance Page, then if you manually add a Member ID and future Expiration Date, they will be considered a Member, and have access to the Membership Folders the next time they login.

Setting up Members

Existing Members through import

If you have existing members that you currently manage outside of your website, you will need to create or import a Contact for each member before they can attempt to register with your website. Membership Access information is located in the Contact, and will need to be defined for each Member so that the website will know that they are approved as a member when they register.

When you create or import Contacts for your members, be sure to include a Member ID and an optional Expiration Date.

TIP: Member IDs do not have to be unique to each User. If you allow an organization-wide membership for your Customers, you can import a Contact for each individual person in the organization, each with the same Member ID. This allows each individual to register and create their own User account but they will all share the same Member ID. If you add an Expiration Date to any Contact sharing a Member ID, the system will expire the membership of all Members that share the same Member ID.

TIP: If you want to grant a lifetime membership to any Member, leave the Expiration Date field blank. You can always fill in a value at any time to expire their membership earlier.

New Members through online purchase

You can also allow the Member ID (and optional Expiration Date) to be created for you, when a Customer places an Order through the website. This is ideal for providing fee-based membership access.

For these members, you don't need to import or create a Contact for each member ahead of time. Instead:

- 1) Set the Membership fields in the Product they will be ordering.
- 2) Make sure that the first Page in your checkout process (i.e. Express Order Page, Billing Information Page, etc.) is located in a Registration Folder so that the Customer will be required to register/login at the time the Order is placed.

When the Order is placed, the Customer will be able to access the contents of all Membership Folders until the Expiration Date. At that point, their login will no longer allow them to access content in Membership Folders.

The Order Number is used as the Member ID, and any optional Membership Renewal (Days) specified by the Product are added to the current date and saved in the Member/Customer's Contact.

TIP: If you want to grant a lifetime membership to the Customer when they purchase, then set the Membership

Renewal field in the Product to a large number (e.g. 999999).

New Members through trial form

You can also allow the Member ID (and optional Expiration Date) to be created for you, when a Registered User submits a Custom Form Page that has the "Membership Trial Days" feature enabled. This is ideal for letting trial members view Membership Folder content for a limited time.

For these members, you don't need to import or create a Contact for each member ahead of time. Instead:

- 1) Setup a Custom Form Page and enable the "Membership Trial Days" feature in the Custom Form.
- 2) Place the Custom Form Page in a Registration Folder so the site Visitor will be required to register or login before proceeding to the Custom Form Page.
- 3) When the Custom Form Page is successfully submitted, the Member will be able to access the contents of all Membership Folders until the Expiration Date. At that point, their login will no longer allow them to access content in Membership Folders.

The Submitted Form's Reference Code is used as the Member ID, and any optional Membership Renewal (Days) specified by the Custom Form are added to the current date and saved in the Member's Contact.

NOTE: Once a Member has been granted membership in this way, they cannot submit another (trial) membership form using the same e-mail address. This prevents abuse of the trial memberships. (There is no way to limit trials by IP address or other means, it simply won't offer any more protection from abuse.)

Renewing Members through online purchase

You can also allow any member (trial or expired) to renew their membership when they place an Order through the website.

- 1) Set the Membership fields in the Product they will be ordering.
- 2) Make sure that the first Page in your checkout process (i.e. Express Order Page, Billing Information Page, etc.) is located in a Registration Folder so that the Customer will be required to register/login at the time the Order is placed.

When the Order is placed, the Customer will be able to access the contents of all Membership Folders until the new Expiration Date. At that point, their login will no longer allow them to access content in Membership Folders.

Since a Member ID will already exist, the Member ID will remain unchanged. The Membership Renewal (Days) specified by the Product are added to the current date and saved in the Member/Customer's Contact.

TIP: You can use the Membership Renewal reminder feature found in the Site Settings to automatically send each Member an e-mail when their membership is about to expire. This allows you to totally automate the membership process.

My Active Members

This screen displays all Contacts that have a Member ID and have a future Expiration Date.

NOTE: The existence of a Member ID and future Expiration Date does not necessarily mean this Contact can view any Pages or Files in the Membership Folders yet. If the Contact is also found on the "Unregistered Members" screen, then they have not registered yet, and therefore do not have Membership Folder access.

Members still must register either through:

1. the Membership Entrance Page
2. the Registration Entrance Page and purchase a membership Product
3. the Registration Entrance Page and submit a membership trial Custom Form

in order to create a User account that will allow them access until the Expiration Date passes.

My Expired Members

This screen displays all Contacts that have a Member ID and a past-dated Expiration Date.

TIP: You can update the Expiration Date field in the Contact to a future date and their access to Membership Folder content will be restored instantly.

NOTE: The existence of a Member ID and future Expiration Date does not necessarily mean this Contact can view any Pages or Files in the Membership Folders yet. If the Contact is also found on the "Unregistered Members" screen, then they have not registered yet, and therefore do not have Membership Folder access.

My Unregistered Members

This screen displays Contacts that contain a Member ID, but do not have a corresponding User account associated with them. Therefore, these Contacts do not have access to Membership Folders yet.

Members still must register either through:

1. the Membership Entrance Page
2. the Registration Entrance Page and purchase a membership Product
3. the Registration Entrance Page and submit a membership trial Custom Form

in order to create a User account that will allow them access until the Expiration Date passes.

My Contacts By Business Address

This screen displays all Contacts that you have access to, that also have a complete business address.

My Contacts By Home Address

This screen displays all Contacts that you have access to, that also have a complete home address.

All Duplicate Contacts

This screen displays all duplicate Contacts, which are any Contacts that share the same e-mail address. You can merge any or all duplicate Contacts into a single Contact, removing the duplicates.

Children and Orphan Contacts

Before you merge Contacts, it is important to understand how they are merged safely, so that unverified data is not accidentally added to any User accounts, and that no data is lost unnecessarily. There are two types of duplicate Contacts. "Child" Contacts are those Contacts that are connected to a User account. Child Contacts always appear at the top of its group of duplicate Contacts on this screen, and there is a checkbox visible that is linked to their associated User account. "Orphan" Contacts are those Contacts that are NOT connected to a User account. Orphan Contacts contain unverified data with respect to User account information.

Merging Rules

When a group of Contacts are merged together, and all Contacts in selected group are Orphans, then each Orphan's data fields are merged together into the newest Orphan Contact. Only data fields that are empty are merged, no data is overwritten. The last modified date for the remaining Contact is not modified. The older Orphan Contacts are then PERMENENTLY DELETED from the database, and the remaining Contact is no longer visible in the Duplicate Contacts screen.

When a group of Contacts are merged together, and one of the Contacts in selected group is a Child Contact, then each all Orphan's are NOT merged together into the Child Contact. This is done because we cannot verify that any Orphan Contact data is valid, so it cannot be added to a User account's contact data. The last modified date for the Child Contact is not modified. All Orphan Contacts are simply PERMENENTLY DELETED from the database, and the remaining Child Contact is no longer visible in the Duplicate Contacts screen.

When a group of Contacts are merged together, and all are Child Contacts that share the same e-mail address, they will be ignored. If necessary, you can manually merged these Contacts since a closer inspection will reveal that their associated User account does not share the same e-mail address.

WARNING: Due to the destructive and permanent nature of merging contact data, only Site Managers, Site Designer, and Site Administrators can merge Contacts. Once Contacts are merged, they cannot be unmerged - the merged Contacts are deleted from the database. Therefore, we highly recommend that you back up by export all Duplicate Contacts before attempting to merge any contacts. Realize that if you do need to import your previously saved Contacts, only orphan Contacts will be created.

My Contacts By User

This screen displays all Contacts that you have access to, that also have a corresponding User account.

All Contact Groups

This screen displays all Contact Groups that you have access too. Contact Managers can import, update, and delete all Contacts in any their Contact Groups they manage.

All Contacts are organized into Contact Groups. Contact Groups can be used to simply group Contacts together for purposes of organization or classification, but more commonly are to create mailing lists for sending e-mail Campaigns.

If a Contact Manager is also a Campaign Manager, they can also create e-mail Campaigns and send to all Contacts within their Contact Groups.

TIP: Since Contact management rights for Contact Groups can be given to individual Users, Contact Groups are ideal for managing e-mail lists (and subscriptions) by department, ministry, organization, team, or topic.

Creating & Updating Contact Groups

You must be a least a Site Manager to create or update Contact Groups. To Create a Contact Group, click "Create Contact Group".

Viewing Contact Groups

Contact Managers cannot view Contact Groups, only the Contacts within the Contact Groups they have access to. All Contacts Groups are visible to Site Managers.

Deleting Contact Groups

You must be a least a Site Manager to delete Contact Groups. To delete a Contact Group, edit a Contact Group and click "Delete".

Create/Edit Contact Group

This screen displays the a Contact Group and e-mail subscription features.

All Contacts are organized into Contact Groups. Contact Groups can be used to simply group Contacts together for purposes of organization or classification, but more commonly are to create mailing lists for sending e-mail Campaigns.

If a Contact Group is used as a mailing list, then it can be "open" to any Subscribers, or "closed" to any new Subscribers.

Open Subscriptions are ideal for creating numerous self-managed mailing lists covering many topics and allow any Subscriber to join the mailing list at any time.

Closed Subscriptions are used for creating private mailing lists that are maintained by a Contact Manager or by the the system system's work-flow features. This allows you to create and manage Staff-Only mailing lists, Member-Only mailing lists, and Customer-Only mailing lists, etc.

Here are the Properties of a Contact Group:

Contact Group Name

Enter the Name of the Contact Group.

Contact Group
Name:

NOTE: If this is an Open Subscription, this name will be visible to all Subscribers on the E-Mail Preferences Page.

Allow Campaigns to send to this Contact Group

Enable E-mail
Subscription:

Select this check box if you want this Contact Group to be available to the e-mail Campaign feature (i.e. a mailing list).

Open: Allows all Subscribers that view the E-Mail Preferences Page to add themselves to this Contact Group (join this mailing list). They will also be able to opt-in and opt-out (and back in) as they choose at any time.

E-mail
Subscription
Type:

Closed: No Subscribers that are not already in the Contact Group will be able to add themselves to this mailing list.

NOTE: To join a Closed Subscription, a Subscriber must first be added to the Contact Group by a Contact Manager through the Control Panel or by the the system system's work-flow features. Once this happens, then the Subscriber will be able to see this Contact Group Name & Description and be able to opt-out (and back in) as they choose from the E-Mail Preferences Page at any time.

Description/Subscription Message on My Account Pages

Description:

If "Enable E-mail Subscription" is set, this Description is displayed on the E-Mail Preferences Page to inform prospective Subscribers of the purpose for this mailing list. Otherwise, this Description is just used for informational purposes in the Control Panel.

All My Users

This screen displays all the Users you have access to.

Any person that can login to your website is considered a User. Users can have a wide range of access to features and content, depending on the Role and combined settings of their User account:

- **Registered (Guest) Users** have registered through the Registration Entrance Page which grants them "view" access to any content in any Guest or Registration Folder.
- **Private Users** have been assigned "view" access to the content in one or more Private Folders.
- **Member Users** have been imported as Contacts, or have registered through the Membership Entrance Page which grants them "view" access to any content in any Membership Folder.
- **Content Managers** have been assigned "edit" access to the content and shared content in one or more Folders. They can edit Pages, Comments, and optionally edit specific Common Regions and Menu Regions that are made available to them.
- **Calendar Managers** have been assigned "edit" access to one or more Calendars. They can create Calendar Events and publish them.
- **Submitted Forms Managers** have been assigned "edit" access to the Submitted Form (captured from Custom Form Pages located in one or more Folders). They cannot change edit the Custom Form Page or Custom Form fields themselves, even through they can edit the Submitted Forms collected from them.
- **Visitor Report Managers** have been assigned "edit" access to the Visitor Reports.
- **Contact Managers** have been assigned "edit" access to all the Contacts in one or more Contact Groups.
- **Campaign Managers** have been assigned e-mail broadcasting rights to one or more Contact Groups.
- **Ad Managers** have been assigned "edit" access to selected Ad Regions. They can create, edit, and delete ads, and even update Ad Region Properties themselves if they are made available to them.
- **Commerce Managers** have been assigned "edit" access to all e-commerce features, including Orders.
- **Site Managers** are Users are assigned the "Manager Role" and can change the Site Settings, and all other User Accounts, except Site Administrators, Site Designers, or other Site Managers.
- **Site Designers** are Users are assigned the "Designer Role" and can change the Site Settings and Site Managers. This means that Site Designers have all Site Manager privileges.
- **Site Administrators** are Users are assigned the "Administrator Role" and can change the Site Settings and control every aspect of the system including managing Site Designer and Site Managers. This means that Site Administrators have all Site Designer and Site Manager privileges.

Creating Users

To create a User, click on "Create User". Only Site Managers, Site Designers, and Site Administrators can create, edit, and delete Users.

TIP: A User can also be created automatically by the system, whenever a Visitor submits either the Registration Entrance Page, or the Membership Entrance Page.

Importing Users

To import and create many Users at one time, click on "Import Users".

Create/Edit User

This screen allow you to set each User's privileges as well as reset and e-mail a new password to them:

User Account ID & Login Name

Username:

Enter the name that this User will use to login to the website. This is also their User Account ID so it must be a unique value among all other User accounts.

Send User to a Specific Page on Login

When this User logs in, if they are not attempting to access a Page or File, they will be taken to this Page.

User Start Page:

TIP: This feature is useful, for example, if you want all of your staff to login through a Login Page and go directly to your staff portal home page. You can also set this value whenever a Customer orders a particular Product.

None: If the Role is not "User", and they are not logging in to access any restricted Page or File, they will be directed to the "Welcome" page of the Control Panel upon log in.

User Information for Password Retrieval

Enter this User's e-mail address.

User E-mail Address:

NOTE: Each User must have an e-mail address and the e-mail address must be different from all other User's e-mail addresses. the system uses this e-mail address to send their temporary password, and also to associate the User with their (optional) Contact for pre-filling Custom Form Pages, My Account Pages, and Commerce Pages.

Notify of New Contacts from Widget

E-mail User whenever a contact is created using the contact widget:

Check this box if you would like this User to be notified whenever a Contact is created from the Contact Form Widget.

NOTE: Contact Form Widgets are added to Designer Regions and Page Styles by Site Designers.

Set Default Privileges for User Account

The Role sets the level of privileges for this User.

User Role:

NOTE: If you select "Administrator", "Designer", or "Manager", the remaining fields on this screen are hidden because these roles include all "User" privileges. The Site Settings and Site Log buttons will be visible on the Welcome Page.

For "Designers", the [DESIGN] tab will be visible to this User in the Control Panel.

Content Management & Forms Management Rights

Allow User to view and edit pages, files, and custom forms within selected folders:

Select the website Folders that this User will have "edit" access to. All Pages and Files placed in the selected Folders can be managed by the User. The [FOLDERS], [PAGES], and [FILES] tabs will be visible to this User in the Control Panel.

Also allow User to create/duplicate pages in selected folders:

For the Folders selected (above), allow this User to also create and duplicate Pages.

NOTE: If this is unchecked then the User will only be able to modify existing Pages that they have "edit" access to. They will be unable to create new Pages.

Also allow User to delete pages in selected folders:

For the Folders selected (above), allow this User to also delete Pages.

NOTE: If this is unchecked then the User will only be able to modify existing Pages that they have "edit" access to. They will be unable to delete Pages.

Also allow User to

access submitted form data for selected folders:	For the Folders selected (above), allow this User to also manage any Submitted Forms collected. The [FORMS] tab will be visible to this User in the Control Panel.
Allow User to set the following page types for pages:	<p>Select the Page Types that this User will be able to set for their Pages. This can be used to prevent a User from creating certain Page Types if they should not need too.</p> <p>NOTE: All Users have access to the Standard Page Type if they have "edit" access to the Page's Folder.</p> <p>Shared Content Management Rights</p> <p>Select the Common Regions that this User will have "edit" access to.</p>
Allow User to edit the content within the selected Common Regions:	<p>IMPORTANT: Since edit access to shared content is only allowed through editing a Page (if not a Manager Role), this feature requires that the User has edit access to at least one Folder that contains a Page that is associated with a Page Style that includes the Common Region.</p> <p>Select the Menus that this User will have "edit" access to.</p>
Allow User to edit Menu Items within the selected Menus:	<p>NOTE: This feature gives the User access to edit the Menu Item's but not the Menu Properties.</p> <p>IMPORTANT: Since edit access to shared content is only allowed through editing a Page (if not a Manager Role), this feature requires that the User has edit access to at least one Folder that contains a Page that is associated with a Page Style that includes the Menu Region.</p>
Allow User to add events to one or more calendars:	Calendar Management Rights
Also allow User to publish calendar events for selected calendars:	<p>Check this box if you would like this User to have access to manage all Calendar Events for the Calendars you select. The [CALENDARS] tab will be visible to this User in the Control Panel.</p> <p>For the Calendars selected (above), allow this User to also publish Calendar Events. In addition, if this field is checked, the User will be able to edit Calendar Events that have been published.</p>
Allow User to manage all visitor reports:	Visitor Report Management Rights
Allow User to view, edit, import, and export all contacts within any selected contact groups:	Contact Management & Campaign Management Rights
Allow User to send e-mail campaigns to any selected contact groups:	<p>Check this box if you would like this User to have access to create and view all Visitor Reports. The [VISITOR] tab will be visible to this User in the Control Panel.</p> <p>Check this box if you would like this User to have access to manage the Contacts in one or more Contact Groups that you select. The [CONTACTS] tab will be visible to this User in the Control Panel.</p>
Allow User to manage all commerce (i.e. products, shipping, tax, and orders):	Commerce Management Rights
Also allow User to view card data:	<p>Check this box if you would like this User to have access to manage all e-commerce features. The [COMMERCE] tab will be visible to this User in the Control Panel.</p> <p>Check this box if you would like this User to be able to view credit/debit card numbers and verification numbers. If the User is not allowed to view card data then the card number and verification number will be protected (i.e. starred out except for the last 4 digits of the card number). The User will be able to see the card type, cardholder, and expiration date regardless of whether this check box is checked or not.</p>
	Card data is only stored if your site is not using a payment gateway. Card data can appear

on the view order and view order report screens and in order exports.

Please see the Payment Card Industry Data Security Standard (PCI DSS) for information about who is allowed to view card data.

Check this box if you would like this User to have access to enable and disable the "Allow Offline Payments" feature for specific orders.

Allow User to set offline payment option for orders:

NOTE: Users who have access to "Allow User to set offline payment option for orders" will be able to enable and disable this feature for orders as needed by selecting the "Allow offline payment option for this Cart" while on the Shopping Cart or Express Order Pages.

Ads Management Rights

Select the Ad Regions that this User will have "edit" access to. The [ADS] tab will be visible to this User in the Control Panel.

Allow User to manage Ads within the selected Ad Regions:

NOTE: In order for the User to also edit the Ad Region Properties, be sure that the User has edit access to at least one Folder that has a Page that is associated with a Page Style that includes the Ad Region.

Private Content Access Rights

Select the website Folders that this User will have "view" access to. All Pages and Files placed in the selected Folders can be viewed (not edited) by the User.

Allow User to view pages, files, and submit custom forms within selected private folders:

Once you check a Folder, you will have the option of entering an expiration date in case you only want to grant access for a certain period of time. The format of the expiration date should be mm/dd/yyyy, and you may leave the field blank if you want the access to be granted indefinitely. The expiration date should be the last day that you want the User to still be able to access the content. After the expiration date, access will be automatically removed and the date will appear in red. If the User attempts to access the content after the expiration date, then he/she will receive an error that explains that his/her access has expired.

TIP: Use this feature to allow access to select Users, for example, to allow only your employees to access a staff-only portal area of your website. Simply create a Private Folder for each group, and assign access to certain Users.

TIP: These Folders can also be set when a Customer orders a Product that has it's "Grant Private Access to Customer" feature set.

Badge

Show badge next to username:

Badges provide a way for you to label certain Users as "special". Your site's badge is defined in the Site Settings, and can be assigned to any User. Badges will appear next to the User's name whenever they post information that is displayed on your site.

Badges for each User are added or removed from their username automatically across the site instantly when this option is changed.

Reward Program

Reward Points:

If you enable the Reward Program feature in Site Settings, and this User has ordered any Products that have reward points, then this field will contain the accumulated total of reward points for this User.

TIP: You can adjust (or reset to zero) the number of reward points for this User at any time if necessary.

WARNING: If you create a User with the same e-mail address as an existing Contact, no connection between the two will be made by the system. If you do this by mistake, you can delete the Contact and ask the User to register

again, so that a new Contact can be created by the System and connected to the User. You can reference the "My Contacts by User" and "My Registered User" screens to display all connected Contacts and User accounts.

Import Users

You can Import Users into your website database from your local computer any Comma Separated Values (CSV) File. CSV file format is a universally accepted way to move data between systems. Most spreadsheet programs and databases can save data as a CSV text file so it is an ideal way to upload Users.

Import from CSV file or Microsoft Excel

1. Prepare your data

The easiest way is to get your data into columns in a spreadsheet. You may import Users by uploading a CSV file. You can save a CSV file from Microsoft Excel. Here are the guidelines for the CSV file:

- The first row of the CSV file must contain the names of the columns that you wish to import data for.
- Columns can be listed in any order.
- If you are saving a CSV file on a Mac, you might need to select the "Windows CSV" format in Excel.

Here is the list of the valid User Properties that you can import. Place one of the following on the first row of each of your data columns:

- username
- email_address

2. Select Import File, Role & Privileges

	Select Formatted Text File to Upload
CSV File:	Click on the [Browse] button to select a CSV text file from your local computer that contains the Users that you wish to import.
	Send User to a Specific Page on Login
	When this User logs in, if they are not attempting to access a Page or File, they will be taken to this Page.
User Start Page:	TIP: This feature is useful, for example, if you want all of your staff to login through a Login Page and go directly to your staff portal home page. You can also set this value whenever a Customer orders a particular Product.
	User Information for Password Retrieval
	Enter this User's e-mail address.
User E-mail Address:	NOTE: Each User must have an e-mail address and the e-mail address must be different from all other User's e-mail addresses. the system uses this e-mail address to send their temporary password, and also to associate the User with their (optional) Contact for pre-filling Custom Form Pages, My Account Pages, and Commerce Pages.
	Notify of New Contacts from Widget
E-mail User whenever a contact is created using the contact widget:	Check this box if you would like this User to be notified whenever a Contact is created from the Contact Form Widget.
	NOTE: Contact Form Widgets are added to Designer Regions and Page Styles by Site Designers.
	Set Default Privileges for User Account
	The Role sets the level of privileges for this User.

User Role:	NOTE: If you select "Administrator", "Designer", or "Manager", the remaining fields on this screen are hidden because these roles include all "User" privileges. The Site Settings and Site Log buttons will be visible on the Welcome Page.
	For "Designers", the [DESIGN] tab will be visible to this User in the Control Panel.
	Content Management & Forms Management Rights
Allow User to view and edit pages, files, and custom forms within selected folders:	Select the website Folders that this User will have "edit" access to. All Pages and Files placed in the selected Folders can be managed by the User. The [FOLDERS], [PAGES], and [FILES] tabs will be visible to this User in the Control Panel.
Also allow User to create/duplicate pages in selected folders:	For the Folders selected (above), allow this User to also create and duplicate Pages. NOTE: If this is unchecked then the User will only be able to modify Pages that they have "edit" access to.
Also allow User to access submitted form data for selected folders:	For the Folders selected (above), allow this User to also manage any Submitted Forms collected. The [FORMS] tab will be visible to this User in the Control Panel.
Allow User to set the following page types for pages:	Select the Page Types that this User will be able to set for Pages. All Users have access to the Standard Page Type if they have "edit" access to the Page's Folder.
	Shared Content Management Rights
Allow User to edit the content within the selected Common Regions:	Select the Common Regions that this User will have "edit" access to. IMPORTANT: This feature requires that the User has edit access for at least one Folder. This is so that they can get to the Common Region when editing a Page. Select the Menus that this User will have "edit" access to.
Allow User to edit Menu Items within the selected Menus:	NOTE: This feature gives the User access to edit the Menu Item's but not the Menu Properties. IMPORTANT: This feature requires that the User has edit access for at least one Folder. This is so that they can get to the Menu Items when editing a Page.
	Calendar Management Rights
Allow User to add events to one or more calendars:	Check this box if you would like this User to have access to manage all Calendar Events for the Calendars you select. The [CALENDARS] tab will be visible to this User in the Control Panel.
Also allow User to publish calendar events for selected calendars:	For the Calendars selected (above), allow this User to also publish Calendar Events.
	Visitor Report Management Rights
Allow User to manage all visitor reports:	Check this box if you would like this User to have access to create and view all Visitor Reports. The [VISITOR] tab will be visible to this User in the Control Panel.
	Contact Management & Campaign Management Rights
Allow User to view, edit, import, and export all contacts within any selected contact groups:	Check this box if you would like this User to have access to manage the Contacts in one or more Contact Groups that you select. The [CONTACTS] tab will be visible to this User in the Control Panel.
Allow User to send e-mail campaigns to any selected contact groups:	Check this box if you would like this User to have access to create and send e-mail campaigns to one or more Contact Groups that you select. The [CAMPAIGNS] tab will be visible to this User in the Control Panel.
	Commerce Management Rights

Allow User to manage all commerce (i.e. products, shipping, tax, and orders):

Check this box if you would like this User to have access to manage all e-commerce features. The [COMMERCE] tab will be visible to this User in the Control Panel.

Also allow User to view card data:

Check this box if you would like this User to be able to view credit/debit card numbers and verification numbers. If the User is not allowed to view card data then the card number and verification number will be protected (i.e. starred out except for the last 4 digits of the card number). The User will be able to see the card type, cardholder, and expiration date regardless of whether this check box is checked or not.

Card data is only stored if your site is not using a payment gateway. Card data can appear on the view order and view order report screens and in order exports.

Please see the Payment Card Industry Data Security Standard (PCI DSS) for information about who is allowed to view card data.

Check this box if you would like this User to have access to enable and disable the "Allow Offline Payments" feature for specific orders.

Allow User to set offline payment option for orders:

NOTE: Users who have access to "Allow User to set offline payment option for orders" will be able to enable and disable this feature for orders as needed by selecting the "Allow offline payment option for this Cart" while on the Shopping Cart or Express Order Pages.

Ads Management Rights

Select the Ad Regions that this User will have "edit" access to.

Allow User to edit Ads within the selected Ad Regions:

NOTE: This feature will also give the User access to the [Ads] tab.

IMPORTANT: In order for the User to edit Ad Region Properties, then they will need edit access for at least one Folder. This is so that they can get to the Ad Region Properties when editing a Page.

Private Content Access Rights

Select the website Folders that this User will have "view" access to. All Pages and Files placed in the selected Folders can be viewed (not edited) by the User.

Allow User to view pages, files, and submit custom forms within selected private folders:

Once you check a Folder, you will have the option of entering an expiration date in case you only want to grant access for a certain period of time. The format of the expiration date should be mm/dd/yyyy, and you may leave the field blank if you want the access to be granted indefinitely. The expiration date should be the last day that you want the User to still be able to access the content. After the expiration date, access will be automatically removed and the date will appear in red. If the User attempts to access the content after the expiration date, then he/she will receive an error that explains that his/her access has expired.

TIP: Use this feature to allow access to select Users, for example, to allow only your employees to access a staff-only portal area of your website. Simply create a Private Folder for each group, and assign access to certain Users.

TIP: These Folders can also be set when a Customer orders a Product that has it's "Grant Private Access to Customer" feature set.

3. Upload Users

Click "Import & Send Passwords" to create the User accounts and e-mail each User a temporary password.

IMPORTANT: If you are trying to import your existing Members, please do not import them as Users. Instead, you need to import them as Contacts.

My Registered Users

This screen displays all Users that also have a connected Contact.

My Private Users

This screen displays all Users that also have been granted "view" access to the content in one or more Private Folders.

My Member Users

This screen displays all Users that also have been granted "view" access to the content in all Membership Folders.

My Content Managers

This screen displays all Users that also have been granted "edit" access to the content in one or more Folders. This allows them to view and edit all Pages and their Comments, Files, Custom Forms, Form Views, and Calendar Views within selected Folders.

My Calendar Managers

This screen displays all Users that also have been granted "edit" access to manage all Calendar Events for one or more Calendars.

My Submitted Forms Managers

This screen displays all Users that have been granted "edit" access to the content in one or more Folders and have also been granted access to manage any Submitted Forms collected (from any Custom Form Pages placed in the same Folders).

My Visitor Report Managers

This screen displays all Users that have access to create and view all Visitor Reports.

My Contact Managers

This screen displays all Users that also have access to manage all Contacts within one or more Contact Groups.

My Campaign Managers

This screen displays all Users that have been granted the privilege to broadcast e-mail Campaigns to one or more Contact Groups.

My Commerce Managers

This screen displays all Users that also have been granted management access to all e-commerce features and Orders.

Site Managers

This screen displays all Users that are assigned the "Manager" Role and can change the Site Settings, and all other User Accounts, except Site Administrators, Site Designers, or other Site Managers.

They cannot access the [DESIGN] tab directly, but they can modify Menus, Common Regions, and edit Page Styles while editing Page content.

Site Designers

This screen displays all Users that are assigned the "Designer" Role and can change the Site Settings, Site Managers, and access the [DESIGN] tab to modify the website look and feel.

They can also access Page Styles while editing Page content.

They cannot view or edit Site Administrators or other Site Designers.

Site Administrators

This screen displays all Users that are assigned the "Administrator" Role and can change the Site Settings and control every aspect of the system including managing Site Designer and Site Manager User Accounts.

My Campaigns

This screen displays all e-mail Campaigns that you can manage.

Campaigns are a powerful way to keep in touch with prospects, members, customers, and others interested in what you do through e-newsletters, e-promotions, and e-announcements.

Campaigns can be sent as plain text or HTML (by selecting a Page) to a one of more Contact Groups.

Only Contacts that have a valid e-mail address and have "opted-in" to receive e-mails will be included in any Campaign. We call these Contacts "Subscribers".

Since Campaigns can be Pages, your website design, content styling, logo, and other branding can remain intact, so your image stays consistent and professional to all Subscribers.

You can also add a personalization tag before you broadcast it, and the system will insert each Subscriber's name into every e-mail message.

Campaigns can be paused, restarted, and canceled at any time before they have been completed. You can monitor a Campaign's Status at any time.

Creating Campaigns

You must be a Campaign Manager to create a Campaign.

If you are also a Content Manager, you can create a Campaign from any Page that you can edit. Modify the Page to your liking, and click "Create Campaign". Your Page will be selected by default.

TIP: Be sure that you assign at least one Contact Group to your Campaign Managers so they have access to Contacts to send too. Likewise, you can also use this feature to restrict Campaign Managers to only sending Campaigns to their own Contact Groups.

NOTE: For HTML Campaigns, a snapshot copy of the Page being sent is saved within each Campaign, so that the content remains the same even if the Page gets changed or deleted after the Campaign has been created or sent.

NOTE: For HTML Campaigns, when a Campaign is created a unique tracking code will automatically be added to the end of each returning link (this is a link that comes back to your site) that does not already contain a tracking code.

NOTE: Because the majority of e-mail clients do not support JavaScript, E-mail Campaigns will not include it. This means Pages that contain Ad Regions, Photo Galleries, or any other type of JavaScript should not be e-mailed.

NOTE: If the built-in Google Analytics, Who's Online, or Social Networking features are enabled for your site, those code snippet will not be included in Pages when they are e-mailed because they can cause delivery or viewing problems for some recipients.

Viewing Campaigns

Click on the Campaign name that you want to view. Campaign Managers can only view and edit their own Campaigns. Site Managers can manage any Campaign.

Sending Campaigns

Campaigns can be started or restarted manually at any time, or started automatically at a future date and time if the

Campaign Scheduler is enabled.

Campaigns merge all Subscribers together and removes any opt-outs and duplicate e-mail addresses to ensure that only those Subscribers that want the e-mail will get one, and only one!

Campaigns send individual e-mail messages to each Subscriber, so that no snooping e-mail administrator can view the message header record and determine who else received the same e-mail communication. This method also produces the highest delivery rate.

For HTML Campaigns, two versions of the Page are embedded into each e-mail message. One version is HTML, reformatted to be displayed correctly within any web-based e-mail client, like Gmail or Yahoo! mail. The other is a text version, created automatically from the Page's content, so that text-based e-mail clients don't see any messy HTML if they are unable to render it. Also included in the message footer is a link to the Page itself, so that the Subscriber can view the message from within their web browser if they wish.

Sending from your Desktop Browser

If the Campaign Scheduler is disabled, the system will use your desktop browser to send the Campaign. To manually start or restart a Campaign, click on the Campaign name and then click on "Send Campaign".

When you click "Send Campaign", a browser window pops up and begins sending the e-mail messages for the Campaigns. If you close the browser window, or click "Stop & Close" before the Campaign is complete, the Campaign will be interrupted and not all e-mails will be sent.

If you do close the window or stop the Campaign, you can "resume" it again at anytime to sent the remaining e-mails by clicking "Send Campaign" again.

NOTE: The system broadcasts individual e-mail messages that are not sent at one time to maximize delivery rate, so please be patient.

Sending using the Campaign Scheduler

If the Campaign Scheduler is enabled, and you would like the Campaign to be sent automatically at a future date and time, click on the Campaign name and set the "Send at this Date & Time" field. If you leave this field blank, your Campaign will be sent immediately.

Personalizing Campaigns

You can personalize your Campaigns so that each e-mail is delivered with the Recipient's name in the subject or the body of the e-mail. To do this, simply add the follow text tag to the body (for plain text format) or Page content (for HTML format) and/or the Campaign's Message Subject line:

^^name^^

If you want to replace the name value with some alternative text in case the name is blank, then use this format:

[[^^name^^||Recipient]] <- "Recipient" can be replaced with any text.

The "name" mail merge field is replaced with the Subscriber's Contact values according the the following example:

- Dear ^^name^^,
- If there is a value in the Contact's Nickname field, use it:
Dear Andy,
- Else If there is a value in the Contact's Salutation, First Name, Last Name, and Suffix, use:
Dear Mr. Andrew Smith, Jr.,

- Else If there is a value in the Contact's Salutation, First Name, Last Name, use them:
Dear Mr. Andrew Smith,
- Else If there is a value in the Contact's Salutation and Last Name, use them:
Dear Mr. Smith,
- Else If there is a value in the Contact's First Name and Last Name, use them:
Dear Andrew Smith,
- Else If there is a value in the Contact's First Name and no Last Name, use it:
Dear Andrew,
- Else If there is no value in the Contact's First Name or Last Name, use the default text:
Dear Recipient,

Unsolicited E-mail (SPAM)

In order to be compliant with the CAN-SPAM act, legislation intended to prevent unsolicited e-mail from flooding your inbox, each e-mail message sent by a Campaign contains an additional message at the bottom. This message provides the following functions, and cannot be disabled:

- Allows the Subscriber to instantly "opt-out" of any future Campaigns. (They can opt back in later if they wish.)
- Adds the Physical Mailing Address of your organization from the Site Settings.

It is important to point out that we do not condone unsolicited e-mail communications and using this system for such purpose violates our terms of use policies. If we detect such usage by your account, we will disable the Campaign feature for your website permanently.

Create/Edit Campaign

This screen allows you to create a new Campaign or update the Status of a Campaign.

Status

Once your Campaign is created, you will see a Status field. You can edit the status of your Campaign as long as it's not Complete. The Status is affected by whether or not the Campaign Scheduler is enabled.

Ready to Send means that the Campaign is either in the process of being sent, waiting for the Scheduled Time and Date. You can start the Campaign at any time by pressing "Send Campaign".

Paused means that the Campaign has been interrupted by a Campaign Manager. You can restart a paused Campaign at any time and the system will pick up where it left off by changing the status to "Ready to Send". Scheduled Campaigns restart immediately if they are past due, or set to send immediately. If the Campaign Scheduler is not enabled, click on "Send Campaign" to restart the Campaign immediately.

Cancelled means that the Campaign has been stopped by a Campaign Manager. You cannot restart a Campaign that has been cancelled. If the Campaign has already started sending e-mails, those e-mails will still be delivered.

Completed means that all e-mail messages have been sent for the Campaign. You cannot change the Status or restart a Campaign after it has been completed.

New E-Mail Message

Subject: Enter the e-mail Subject that will be placed in the Subject in each e-mail message sent by this Campaign.

Format: Select the format for the Campaign. If you select plain text, then you will be able to enter a plain text body. If you select HTML, then you will be able to select a Page.

This field appears if you selected plain text for the format. Enter the body for the plain text e-mail here.

Body: NOTE: After a Campaign is created, you may only edit the body of a plain text Campaign (not an HTML Campaign).

This field appears if you selected HTML for the format. Select any Page that you have access to. This Page will be placed in the Body field in each e-mail message sent by this Campaign.

My Page to Send: TIP: You should not select a complex Page to send, like one with a shared multi-level Menu, or Custom Form Page. Rendering them in an e-mail message might break some of their functionality. Typically, your Site Designer will add a Page Style specifically designed for any Pages that are going to be e-mailed.

This field appears if you selected HTML for the format. You will see a preview of the Page that was selected (above) as a confirmation that you have selected the correct Page you wish the e-mail.

Body Preview:

NOTE: After a Campaign is created, you may only edit the body of a plain text Campaign (not an HTML Campaign).

E-Mail Message To My Contact Groups

Select from any of your Contact Groups that you wish to Ignore, Include, and Exclude in this Campaign. These three options give you total control of who will and who will not receive an e-mail from this Campaign.

<i>All Contact Groups you have access to are listed here.</i>	Ignore the Contacts in these groups unless they are also in any of the Included groups.	Include every Contact in these groups that are not also in any of the Excluded groups.	Exclude all Contacts from these groups.
Also send message to the following e-mail address:	NOTE: The number listed next to each Contact Group is not the total number of Contacts in the group, but rather the number of Contacts with a valid e-mail addresses.		
	IMPORTANT: Only those Subscribers that have already "opted-in" the Included Contact Groups BEFORE the Campaign was created will be included.		
	You can optionally enter another e-mail address to send this Campaign too, regardless of whether they are in any of the groups listed above.		
	NOTE: If a matching Contact is not found for this e-mail address, the system will create a Contact for the new Subscriber after sending the e-mail message. This will allow them to "opt-out" if necessary.		
	TIP: You can use this feature to send yourself or someone else a "proof" of the e-mail Campaign before you send it to your Subscribers.		
	E-Mail Message From		
	Enter the e-mail message's "From" field. This is not the sender's e-mail address, but the name.		
From Name:	For example, the From Name in this e-mail header "FROM: Jack Bauer <jbauer@24.com>" would be "Jack Bauer"		
	TIP: Typically, you would use either your full name, department, or organization name. Enter the sender's e-mail address.		
From E-mail Address:	NOTE: You must use a valid e-mail address for this value.		
	IMPORTANT: Make sure the domain portion of this e-mail address matches your website domain. If not, many receiving mail servers will detect this difference, flag your messages as spam, and will not deliver your e-mails (many times without bouncing back any non-delivery notices).		
Reply to E-mail Address:	E-Mail Message Reply To		
	When a Subscriber replies to this Campaign, their reply e-mail is delivered to this inbox.		
	NOTE: You must use a valid e-mail address for this value.		
	E-Mail Message Delivery Schedule		
	Date & Time: Enter the Date and Time that you would like the Campaign Scheduler to start sending this Campaign (format: mm/dd/yyyy hh:mm AM/PM).		
Send at this Date & Time:	Blank: Leave this field blank if you want to the Campaign Scheduler to start sending the Campaign immediately.		
	NOTE: If you do not see this field on your screen, the Campaign Scheduler is not enabled. You can still send your Campaigns at any time by clicking "Send Campaign". The scheduled delivery feature must be setup for your account. If you would like us to enable this feature, please contact us.		

NOTE: E-mail messages are sent individually, so it may take some time for the entire Campaign to be delivered.

NOTE: For HTML Campaigns, when a Campaign is created a unique tracking code will automatically be added to the end of each returning link (this is a link that comes back to your site) that does not already contain a tracking

code.

NOTE: Because the majority of e-mail clients do not support JavaScript, E-mail Campaigns will not include it. This means Pages that contain Ad Regions, Photo Galleries, or any other type of JavaScript should not be e-mailed.

All Orders

This screen displays all the Orders successfully submitted. Orders can be searched, filtered, viewed, and exported by any User that has Commerce Management rights.

Viewing Orders

You can view any Orders. You can filter the data that you want to export by using the Search and Advanced Filters located at the top of the screen.

NOTE: When "Advanced Filters" are not displayed (removed), only Complete Orders are displayed. To view Incomplete Orders (Saved Carts), you will need to Add Advanced Filters and set the Order Status.

NOTE: Since this screen displays sensitive payment information, it will be switched into Secure Mode automatically (<https://>) when rendered to encrypt all communications in accordance with PCI Compliance. This requires that an SSL Certificate must be installed on this web server for your domain before you can view payment information online. Please contact your hosting provider for more information and Site Settings for more information on enabling Secure Mode.

Creating Orders

A Order is created when an Order Preview Page or Express Order Page is successfully submitted.

Orders are the collection of information about an sales or donation transaction.

Order are linked to the Contact associated with the Customer. If a Customer orders while logged in, the Order will also be linked to the User.

All Orders contain an Order number, Reference Code, date and time, billing information, payment information, Products ordered and their quantity and price, Order amount, and other referral data if collected.

If a Offer is applied to the Order, then the Order Code and Discount amount is also stored.

If Shipping is enabled, any Shipping amount per recipient is also collected.

If taxation is enabled and the Products ordered are taxable, and the Customer is not tax-exempt, then the Tax amount is also collected.

If a payment gateway is enabled, then the Transaction ID and Authorization Code from the processor is also retrieved and stored.

Saved Carts

All Orders begin as a "Cart" when a Visitor first selects Products from any Order Form Page or Express Order Page and clicks the submit button (Add to Cart). A Cart is basically an incomplete Order, and data fields will begin to accumulate and be stored with the Cart as the Visitor moves through the Commerce Pages.

A Cart can be viewed at any time when a Shopping Cart Page or Express Order Page is displayed. Items in the Cart remain there until either the Visitor closes their browser, or places an Order using the Payment Preview Page or Express Order Page.

Once the Customer places the Order, the Cart is converted into a Complete Order and it is no longer visible from the Shopping Cart Page.

Carts are created in the website database and are maintained within the Customer's browser "session". In this way,

they are always "Saved Carts", so you can link to them by their unique Reference Code and retrieve them later, or send them as links in an e-mail. To find out a Save Cart's Reference Code, simply display the Shopping Cart Page and at the bottom of the page will be a link to the Saved Cart. You can also view all the Carts by looking at the "Incomplete Orders" View.

When a Cart is displayed on an Order Preview Page or an Express Order Page, and the [Purchase] button is clicked, all required fields are completed with appropriate information and do the following:

If a payment gateway is not selected (see Site Settings), the Saved Cart will be converted to an Order and all Order information will be stored in the website database.

If a payment gateway is selected, then the credit/debit card information is sent securely to the payment gateway. If an error occurs during processing, an error message will be displayed, and the Order will NOT be submitted. If no errors occur and the mode is "Live", the Cart will be converted to an Order and saved in the website database. If the mode is "Test" or "Sandbox", the credit card will be processed through the payment gateway, but the charges will NOT be posted to the credit/debit card.

TIP: Use Test or Sandbox mode to verify that the payment gateway is processing valid cards properly. Once that has been confirmed, change the mode to "Live" to process actual transactions.

When a Cart is successfully converted to an Order, the Order Number is calculated (by incrementing 1 to the Next Order Number in Settings) and stored, along with the date and time of the Order, and the Order Receipt Page is displayed. Also, an optional order receipt is e-mailed to the Customer, using the e-mail address from the billing information.

Now the Order can be viewed, exported, and deleted using the Order view and Order Report views. Orders cannot be edited.

Creating e-Quotes

You can also use the Saved Cart feature to send quotes to anyone via e-mail.

To do this, create a Cart and view it in a Shopping Cart Page. At the bottom of the Shopping Cart Page is a link to the Saved Cart. Paste or bookmark this link and include it in an e-mail to your prospect. When the prospect clicks the link, they will be directed to the Shopping Cart Page, which will be populated with the Saved Cart. They can update the Cart as needed, checkout, and place the Order.

TIP: It does not matter who creates the Saved Cart, because no User information is stored in the Saved Cart. The Saved Cart can be recalled at any time from the Cart's creator through the My Account Page, or by anyone using the Saved Cart link. In this way, the Saved Cart can be viewed and updated by several people before it is finally converted into an Order. Once the Cart becomes an Order, the person placing the Order becomes the new owner and is the only person that can view the Order through the My Account Page.

NOTE: Since all Product information is pulled from the database in real-time when a Saved Cart is viewed, the current Product information and pricing is recalculated and displayed.

Exporting Orders

You can export Orders into a text file and view them in a spreadsheet program for importing into your back-end fulfillment system. Based on the needs of your staff or other third-party systems, you have two options for exporting your Order data. You can export your Order data in multiple files or a single file.

You can filter the data that you want to export by using the Search and Advanced Filters located at the top of the screen. Once you are satisfied with the filtered form data, click either [Export Orders] button.

Understanding Order Export Files

There are three data records that make up an Order:

- **Bill To Information** (Order Summary): contains the billing information for the customer. There is only one of these records per Order.
- **Ship To Information**: contains the recipient(s) information. For multi-recipient shipping, there may be one or more of these records per Order.
- **Line Item Information**: contains the Product(s) information. There may be one or more of these records per Ship To record.

Here is a visual illustration of an Order:

Order Summary / Bill To Information #1

Ship To Information #1

Line Item Information #1

Line Item Information #2

Line Item Information #3

Ship To Information #2

Line Item Information #4

Line Item Information #5

Line Item Information #6

Order Summary / Bill To Information #2

Ship To Information #3

Line Item Information #7

Ship To Information #4

Line Item Information #8

Single File Order Export

Single file export files can be opened by any spreadsheet program and are easy to read by humans. Use this method of exporting when you don't need to import the Order data into another database system.

To create a single export file, filter the Orders view to display the Orders you wish to export.

Click [Export Orders (single file)] button to create a file that contains a single CSV file contains all the records for the Orders as follows:

```
"Order Number", "Order Field1", "Order Field 2", ...  
"", "Ship To Name", "Ship To Field 1", "Ship To Field 2", ...  
"", "", "Product Name", "Line Item Field 1", "Line Item Field 2", ...  
"", "Ship To Name", "Ship To Field 1", "Ship To Field 2", ...  
"", "", "Product Name", "Line Item Field 1", "Line Item Field 2", ...  
"", "", "Product Name", "Line Item Field 1", "Line Item Field 2", ...
```

Multiple File Order Export

Multiple file export files are more difficult to read for humans, but are necessary for most import processes of third-party database applications such as accounting or fulfillment systems. Multiple file export files are made up of three or four files: Order/Bill To Information, Ship To Information, Line Item Information, and Shipping Tracking Number Information (if shipping tracking numbers exist). Each file uses a unique ID (key) that joins it to its associated records in the other files.

To create a multiple file export, filter the Orders screen to display the Orders you wish to export.

Click [Export Orders (multiple files)] button to create a compressed ZIP file containing the three or four CSV files with all the records for the Orders as follows:

orders.csv file contains:

"Order ID", "Order Number", "Order Field1", Order Field 2", ...
"Order ID", "Order Number", "Order Field1", Order Field 2", ...

ship_tos.csv file contains:

"Ship To ID", "Order ID", "Order Number", "Ship To Field 1", "Ship To Field 2", ...
"Ship To ID", "Order ID", "Order Number", "Ship To Field 1", "Ship To Field 2", ...
"Ship To ID", "Order ID", "Order Number", "Ship To Field 1", "Ship To Field 2", ...
"Ship To ID", "Order ID", "Order Number", "Ship To Field 1", "Ship To Field 2", ...

order_items.csv file contains:

"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...
"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...
"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...
"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...
"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...
"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...
"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...
"Line Item ID", "Order ID", "Order Number", "Ship To ID", "Line Item Field 1", "Line Item Field 2", ...

shipping_tracking_numbers.csv file contains:

"Shipping Tracking Number ID", "Order ID", "Order Number", "Ship To ID", "Number"
"Shipping Tracking Number ID", "Order ID", "Order Number", "Ship To ID", "Number"

Removing Card Data

Select the Orders you wish to remove card data for and click "Remove Card Data for Selected". When card data is removed, the credit card number is starred out (except for the last 4 digits) and the verification number is removed permanently. The card type (e.g. Visa), cardholder, and expiration date are preserved.

You can find Orders that still contain card data by looking for a check mark in the card data column of this screen.

In order to comply with the Payment Card Industry Data Security Standard (PCI DSS) it is recommended that you remove card data after the credit/debit card has been authorized.

Deleting Orders

Select the Orders you wish to delete and click "Delete Selected".

WARNING: Take care when deleting Orders, there is no undo. Once you confirm the deletion, the Order data is gone!

TIP: You might want to export the Orders to create a backup copy of the data before you delete it.

View Order

This screen displays the details of a single Order.

Orders are the collection of information about a complete or incomplete e-commerce transaction.

If an Order requires shipping, you may insert one or more tracking numbers for each Ship To. You should enter one tracking number per line in the field. The tracking numbers will then appear on the view order screen in the my account area for the Customer. If the tracking number is from UPS, FedEx, or USPS, then the tracking number will be linked to a status page on the carrier's website.

If you initially only shipped some of the items that the Customer ordered (e.g. a product is out of stock), then you might want to update the shipped quantity to indicate to the Customer how many items were shipped. The ordered quantity and the shipped quantity will then appear on the view order screen in the my account area for the Customer. Once you have shipped the rest of the items to the Customer, then you can update the shipped quantity again to show that all items have been shipped. You can either leave this field blank so a shipped quantity does not appear to the Customer or you can enter any number that is greater than or equal to 0.

If the Order contains shippable items then you can click the printer icon for each recipient in order to print a packing slip. A popup window will appear with the packing slip and the print dialog will automatically appear. A packing slip can be included in the shipment in order to inform the recipient about what is included in the shipment. The quantity that appears on the packing slip is the ordered quantity. Shipped quantity does not appear on the packing slip.

NOTE: Since this screen displays sensitive payment information, it will be switched into Secure Mode automatically (<https://>) when rendered to encrypt all communications in accordance with PCI Compliance. This requires that an SSL Certificate must be installed on this web server for your domain before you can view payment information online. Please contact your hosting provider for more information and Site Settings for more information on enabling Secure Mode.

View Orders for Contact

This screen displays all the Orders tied to a specific Contact.

All Order Reports

This screen displays all Order Reports.

Viewing Order Reports

You can view any Order Reports. You can summarize and filter most all of the Order data.

Creating Order Reports

Click on "Create Order Report" to create an Order Report.

Deleting Order Reports

Select the Order Reports you wish to delete, click "Edit Order Report" and click "Delete".

INFO: Deleting Order Reports does not delete any Order data.

NOTE: Since this screen displays sensitive payment information, it will be switched into Secure Mode automatically (<https://>) when rendered to encrypt all communications in accordance with PCI Compliance. This requires that an SSL Certificate must be installed on this web server for your domain before you can view payment information online. Please contact your hosting provider for more information and Site Settings for more information on enabling Secure Mode.

Create/Edit Order Report

This screen displays the Order Report and allows you to change the summary layout, filters, and save the Order Report. Each time you run a saved Order Report, there is no delay the data, it is always reported in real-time.

Summarizing & Filtering Order Reports

Order Reports allow you to summarize (totals) for almost every data point stored for each Order. You can optional filter the Order Report to restrict the Orders that are included in the report.

Here is a list of all the data points that are stored for each Order, some are used to summarize the report, and others to filter the report. Here is a list of most of the data points available for your reports:

General

Year:	You can summarize or filter all Orders by calendar years.
Month:	You can summarize or filter all Orders by calendar months.
Day:	You can summarize or filter all Orders by calendar days.
Order Status:	You can summarize or filter all Orders by the status of the Order. Complete Orders that have been submitted successfully. Incomplete Orders that have not been submitted yet (Saved Carts).
Order Number:	You can filter all Orders by the Order Number.
Transaction ID:	You can filter all Orders by the unique ID returned from the payment gateway (if enabled).
Authorization Code:	You can filter all Orders by the returned transaction status code from the payment gateway (if enabled).
Special Offer Code:	You can summarize or filter all Orders by Offer Code (if entered by the Customer during the checkout process).
Referral Source Code:	You can summarize or filter all Orders by the optional "How did you here about us?" question asked of Customers during checkout. You can summarize or filter all Orders by it's unique Reference Code. This value can be used to recall a Saved Cart on a Shopping Cart or Express Order Page using the following format: <code>/pages/ExampleShoppingCartPage?r=4TR674D</code> <i>or</i> <code>/pages/ExampleExpressOrderPage?r=4TR674D</code>
Tracking Code:	You can summarize or filter all Orders by the LAST Tracking Code that is added to any of your website links that the Customer clicked on.
Referring URL:	You can summarize or filter all Orders by the actual URL of the previously viewed web browser page of the Customer. For example: " <code>http://www.previouswebsite.com/anotherpage.html</code> "
Currency:	You can summarize or filter all Orders by the Currency the Customer was viewing when the Order was placed.
Customer's IP Address:	You can summarize or filter all Orders by the Customer's IP Address.
Product Name:	You can filter all Orders by and of the Product ID ordered.

Payment

	You can summarize or filter all Orders by the Payment Method. None if the order total was zero.
Payment	Credit/Debit Card if the Customer entered their credit/debit card information on the Order

Method:	<p>Preview Page or the Express Order Page.</p> <p>PayPal if the Customer used their PayPal account through the Paypal website.</p> <p>Offline Payment if the Customer selected to pay offline.</p> <p>You can summarize or filter all Orders by the Card Type, if Credit/debit Card was used.</p> <p>MasterCard</p>
Card Type:	<p>VISA</p> <p>American Express</p> <p>Discover</p>
Cardholder:	You can summarize or filter all Orders by the Customer's Cardholder Name.
Card Number:	You can summarize or filter all Orders by the Customer's Credit/Debit Card Number.
Billing Information	
Custom Field #1:	You can summarize or filter all Orders by the optional Custom Field #1 from the Billing Information Page, or the Express Order Page.
Custom Field #2:	You can summarize or filter all Orders by the optional Custom Field #2 from the Billing Information Page, or the Express Order Page.
Salutation:	You can summarize or filter all Orders by the Customer's Billing Salutation.
First Name:	You can summarize or filter all Orders by the Customer's Billing First Name.
Last Name:	You can summarize or filter all Orders by the Customer's Billing Last Name.
Company:	You can summarize or filter all Orders by the Customer's Billing Company.
Address 1:	You can summarize or filter all Orders by the Customer's Billing Address (line 1).
Address 2:	You can summarize or filter all Orders by the Customer's Billing Address (line 2).
City:	You can summarize or filter all Orders by the Customer's Billing Address City.
State:	You can summarize or filter all Orders by the Customer's Billing Address State/Province.
Zip Code:	You can summarize or filter all Orders by the Customer's Billing Address Zip/Postal Code.
Country:	You can summarize or filter all Orders by the Customer's Billing Address Country.
Phone Number:	You can summarize or filter all Orders by the Customer's Billing Phone Number.
Fax Number:	You can summarize or filter all Orders by the Customer's Billing Fax Number.
E-mail Address:	You can summarize or filter all Orders by the Customer's E-mail Address.
Opt-in Status:	You can summarize or filter all Orders by the Customer's Contact Opt-in Status.
PO Number:	You can summarize or filter all Orders by the optional PO Number entered by the Customer on the Billing Information Page or the Express Order Page.
Tax Status:	You can summarize or filter all Orders by the Order Tax (if applicable).
Shipping Information	
Salutation:	You can filter all Orders by any Recipient's Salutation.
First Name:	You can filter all Orders by any Recipient's First Name.
Last Name:	You can filter all Orders by any Recipient's Last Name.
Company:	You can filter all Orders by any Recipient's Company.
Address 1:	You can filter all Orders by any Recipient's Address (line 1).
Address 2:	You can filter all Orders by any Recipient's Address (line 2).
City:	You can filter all Orders by any Recipient's City.
State:	You can filter all Orders by any Recipient's State/Province.
Zip Code:	You can filter all Orders by any Recipient's Zip/Postal Code.
Country:	You can filter all Orders by any Recipient's Country.
Phone Number:	You can filter all Orders by any Recipient's Phone Number.
Ship to Name:	You can filter all Orders by any Recipient's Ship To Name (from the Customers My Account Page Address Book)
Arrival Date Code:	You can filter all Orders by any Recipient's Arrival Date Code.

Shipping
Method Code: You can filter all Orders by any Recipient's Shipping Method Code.

TIP: Order Reports are shared among all Commerce Managers, so you can setup reports for others to run and view. However, you should also take care when editing someone else's report.

NOTE: When you add a Filter, it is not saved to the report until you click "Save & Run".

NOTE: Deleting a Order Report does not delete any of the Order data.

All Commissions

This screen displays all orders that contained an Affiliate Code and the amount of commission due each Affiliate. You must have enabled "Affiliates" in Site Settings to see this screen. Use the date range filter to view new commissions and their totals.

Commissions are added to this screen whenever an order is completed that has either an Affiliate Code in the Offer Code, or an Affiliate tracking link that was received when the shopper reached your website. Affiliate tracking codes will last in a shopper's browser cookie for 3 months, so even on a return visit to order, the Affiliate still gets the commission.

Commissions are calculated based on the Affiliate's Commission Rate, and the Commission Rate (override) from all purchased Products. Whichever percentage is lower will be used to calculate the commission for each Product ordered. So, if a Product has a commission rate of 10% and the Affiliate has a commission rate of 30%, then the commission will be 10% for that Product. If the Product is recurring, then any commissions for that Product are also recurring. (See Commissions Profiles for more information about recurring commissions). Percentages for Affiliates and Products can be changed at any time by editing the Affiliate's Contact, or the Product's override. You can also set the default commission rate for all new Affiliates in the Site Settings.

Commissions for online payments are not typically payable instantly. Instead, they go through a process before becoming payable to the Affiliates. We use 4 statuses to manage commissions through their lifetime. Statuses are not fixed, so you can move any commission to any status at any time:

- **Pending:** When an order is successfully placed, if the shopper entered the Affiliate's Code in the Offer Code area, or they used the Affiliate's tracking code link to reach your site in the last 90 days, and commissions are due, then the system will create a new "Pending" commission. If any Products are recurring, then a Commission Profile will also be created and enabled for each recurring Product by the system. (See Commissions Profiles for more information).
- **Ineligible:** For order gets cancelled, rejected, or otherwise do not meet the terms of your affiliate agreement, you can change the commission's status to "Ineligible", which ends the process of the commission. (Make sure you also disable any associated Commission Profile too if a recurring Product was ordered).
- **Payable:** Once the order or payment grace period you determine for success has transpired, and the commission is not Ineligible, you would change the commission's status to "Payable". At this point the Affiliate has earned the commission.
- **Paid:** Once your payment terms to Affiliates has been reached, and payment to the Affiliate has been made, you would change the status of the commission to "Paid", which would complete the commission's process.

NOTE: Affiliates can track these statuses in real-time for their own commissions by viewing their My Account page.

Edit Commission

All Recurring Commission Profiles

This screen displays all Recurring Commission Profiles that are created by the system when a commission is detected for a recurring Product that is ordered. Each recurring Product (and Quantity) will have it's own Recurring Commission Profile.

When an order is placed, the system will create and enable the Recurring Commission Profiles needed. Each day, the recurring profiles are scanned, and if a new commission is due, then a new commission will be added to the All Commissions screen and set to the status of "Pending". If you want to "pause" or "stop" or "restart" the creation of new commissions, you can disable or enable the Recurring Commission Profiles at any time. Doing so will not retroactively create any commissions that where missed, the system only looks forward.

Take care in disabling Recurring Commission Profiles, since you cannot create or recreate commissions manually.

Edit Recurring Commission Profile

All Products

Products are displayed/purchased through the website and include merchandise, downloads, donations, fees, recurring fees, account payments, and memberships and renewals.

Products are organized in one or more Product Groups.

Product Groups are referenced by Catalog Pages to display the Products on the website.

In addition, if you want to allow any Products to be purchased through your website, you can also add these Products to any Product Groups that are referenced by any Order Form Pages, allowing Customers to add the Products to their Order/Cart and checkout.

Products can also be "taxable", based on the Customer's billing state/province and country. (If you also sell to non-profits or resellers, you can allow each Customer to declared their tax-exempt status and waive taxes using the optional "Tax-exempt" Site Setting).

Products can also be "shippable", and you can charge shipping fees based on what is ordered and where it is being shipped. You can also define where the Product can and cannot be shipped, and within the time frame specified by the Customer.

Products can also be "commissionable", and a percentage can be tallied for the Affiliate that referred the Customer.

Products can also be setup to charge a recurring payment to the Customer's credit/debit card automatically through a supported payment gateway.

Products can also grant access to any Private Folder upon a successful Order.

Products can also add Customers to a specific Contact Group upon a successful Order.

Products can also add days to the Customers Membership Expiration Date upon a successful Order.

Products can also require a custom Product Form for any Product (and/or quantity) before an Order can be submitted.

Viewing Products

To quickly find a Product, enter a keyword and click "Search". All Products that have the matching keyword within any of their fields will be displayed. Be sure to click "Clear" to reset the screen to show all Products.

To quickly find a type of product, such as recurring or donation products, use the "Product Type" pick list to show only the products that you want to see.

Select the Product and click to view the Product's properties.

Creating Products

Click on "Create Product" to create a new Product.

TIP: If you want to start with a copy of an existing Product, select the Product you wish to copy, then click

"Duplicate" from the Edit Product screen. A new Product will be created and all Product fields will be duplicated into the new Product, ready for you to edit.

Importing Products

To import and create many Products at one time, click on "Import Products".

Editing Products

Select the Product and click to edit the Product's properties.

NOTE: Editing the Product does not affect the Product Groups that display the Product.

Exporting Products

You can easily export any or all Products to your local computer that can be opened with a spreadsheet program (e.g. Microsoft Excel).

Filter the Products view until you have all of the Products you want to export, and click on "Export Products" to download a CSV file.

Exporting Products allows you to export Product data into an external system. It also allows you to update Products offline and then import the updates via the "Import Products" feature (e.g. update inventory levels).

Deleting Products

Select any Products you want to delete, and click on "Delete Selected".

WARNING: Take care when deleting Products, there is no undo. Once you confirm the deletion, the Product is gone!

Create/Edit Product

This screen displays a single Product. This Product can be used to define merchandise, downloads, donations, fees, recurring fees, account payments, event reservations, or memberships and renewals.

New Product Information

Product ID / SKU: This is the Product Name/Code that is displayed on all Commerce Page and saved in the Order database to uniquely identify this Product in an Order.

Unit Price (\$): This is the U.S. Dollar price of a single quantity of this Product.

Product Options

Select this box if you would like this Product to be displayed and processed using the built-in recurring payment features.

Recurring Payment: NOTE: If a payment gateway is enabled in the Site Settings, the system will set up a Billing Profile in the payment gateway's system to charge the credit/debit card provided with the Order automatically at the beginning of each Payment Period for the specified Number of Payments. (Some payment gateways require an extra fee to handle these forms of transactions. Check with your payment gateway provider for more information).

Allow customer to set schedule: NOTE: Currently, this feature is not available for PayPal Express Checkout payments. Check this box if you are collecting recurring donations, and you want your Customers to be able to setup their own recurring payment amount, start date, payment period, and the number or payments. These options will be displayed automatically on the Commerce Pages.

TIP: The Start (days), Number of Payments, and Payment Period for this Product (below) are used as the default schedule presented to your Customers when this Product is selected. Enter the number of days from the Order Date that you wish the recurring payment cycle to begin.

"0" will start the payment cycle immediately, and the first payment will be captured at the point of purchase, and each payment period after that until all payments have been collected.

Start (days): A "1", for example, will capture the first payment the day after the Order is placed, and each payment period after that until all payments have been collected.

If "Allow customer to set schedule" is enabled, then the Start (days) is used to calculate and display the default Start Date presented to the Customer. So a value of "0" would display today's date, and a value of "1" would display tomorrow's date.

IMPORTANT: A value must be placed in this field if you are using a payment gateway.

The number of recurring payments to be captured. Please see specific information for your payment gateway below.

Authorize.Net: You may enter any value up to 9999 or leave the field blank for no limit.

Number of Payments: ClearCommerce: You may enter a value between 2 and 999 or leave the field blank for the default (i.e. 999).

First Data Global Gateway (formerly LinkPoint / YourPay): You must enter a value between 1 and 99. You may not leave this field blank.

PayPal Payflow Pro: You may enter any value or leave the field blank for no limit.

PayPal Website Payments Pro: You may enter any value or leave the field blank for no limit.

Sage: You may enter any value or leave the field blank for no limit.

This periodicity of this recurring payment. Valid values are:

- Payment Period:
- Monthly
 - Weekly
 - Every Two Weeks
 - Twice every Month
 - Every Four Weeks
 - Quarterly
 - Twice every Year
 - Yearly

NOTE: This value is required if you are using the optional Payment Gateway service.

Sage Group ID: This field will appear if you are using the Sage payment gateway. You may enter a recurring group ID from Sage's control panel so that all recurring profiles for this Product are associated with a certain group. If you leave this field blank or set to 0, then a new group will be created each time this recurring Product is purchased.

Taxable: Select this check box is tax should be calculated for this Product.

Shippable: Select this check box if this Product must be shipped. Any shipping charges will be calculated for the quantity of Product (and each recipient) during the checkout process.

Primary Weight Points: If this Product is shippable, Points provides a flexible way to adjust the shipping surcharge applied to this Product (based on weight, size, etc). Points are simply numeric values that are multiplied by the quantity of this Product in the Cart by the Shipping Method selected.

TIP: You can use dollar amounts as Points too.

Secondary Weight Points: If this Product is shippable, Points provides a flexible way to adjust the shipping surcharge applied to this Product (based on weight, size, etc). Points are simply numeric values that are multiplied by the quantity of this Product in the Cart by the Shipping Method selected.

TIP: Secondary Weight Points allow you to fine tune Primary Weight Points or replace them altogether for certain Shipping Methods.

Specify the number of calendar days required to get this Product ready to ship. This is calculated from the Order date and is used in the Arrival Date calculations.

Preparation Time: TIP: This lead time is necessary for transit calculations if you are using the Arrival Date feature to guarantee delivery of this Product by a certain date. This value is ignored if Shipping Cut-offs are configured for an Arrival Date. Shipping Cut-offs override Preparation Time for Products, transit values for Shipping Methods, and Transit Adjustment Days for Countries.

If the Product is shippable, but you would like shipping surcharges to be waived for this Product, check this box.

Free Shipping: NOTE: Any free Products that are shipped, must be sent to a recipient that is also receiving a Product that is not free on the same Order. This ensures that the Customer is not charged shipping for a Product that you are giving away.

This amount will be multiplied by the quantity and added to the total shipping cost.

Extra Shipping Cost: TIP: This feature is generally used for Products that might require extra preparation time and/or expense.

If shippable, these are the States/Provinces and Countries that the Product can be shipped too.

Allowed Zones: NOTE: This zone is cross-matched with the available Shipping Zones and any matching Shipping Methods are displayed for the Customer to pick from on a Shipping Method Page. If no zones match, then a message will appear and the Customer will be asked to change the

	shipping address or remove the Product from their Cart.
Disallowed Zones:	If shippable, these are the States/Provinces and Countries that the Product cannot be shipped too.
Commissionable:	Check this box if this Product qualifies for a commission payout to the Affiliate associated with the Customer referral.
Commission Rate Limit:	This is the maximum commission rate (%) for this Product. Leave this blank if you do not want a specific limit placed on this Product (and the commission rate of the Affiliate associated with the Customer referral will be used instead).
Catalog, Order Form & Cart Page Display Options	
Short Description:	This is the text Product description that is displayed on the Order Form Page (when the "Drop-down Selection" is chosen for the Page's Product Layout).
Full Description:	<p>This is the HTML Product description that is displayed on the Order Form Page (when "List" is chosen for the Page's Product Layout).</p> <p>This field is also displayed on all other the Commerce Pages during the checkout process. This is additional information about the product that will appear at the bottom of the Catalog Detail pages (below the Add to Cart button).</p>
Details:	<p>TIP: Use this field to list related products, additional product information, specifications, FAQs, etc., that you do not want to be displayed on other Commerce Pages during the checkout process.</p> <p>This field is for HTML, JavaScript, or other code that will be outputted at the bottom of the Catalog Detail pages (below the Add to Cart button and details). This field is useful for code that can't easily be added to the full description or details because those fields use a rich-text editor.</p>
Code:	<p>TIP: You can use this field in order to paste conversion/tracking code from analytics or advertising services.</p> <p>Enter an optional list of keywords (e.g. tags) for this Product that will be used to promote this Product in both the Site Search and Catalog Page Search results.</p>
Search Keywords:	<p>Search Keywords are displayed as hyperlinks on the Catalog and Catalog Detail pages whenever this Product is displayed. When clicked by a Visitor, these hyperlinks will search within the scope of the Catalog page (defined by it's Parent Product Group) and will display any other Product Groups and Products that contain data that matches the Search Keyword.</p> <p>NOTE: The keywords in this field will be added to the Tag Cloud if this Product is included in any Product Groups that are being searched by a Search Results page.</p> <p>TIP: Even if there is no Site Search or Catalog Search enabled on your site, Visitors will still be able to click on any Search Keyword hyperlinks. This may be useful if you want to control what keyword searches they can perform.</p>
Image:	<p>This is the image that is used to create navigation on Catalog Pages.</p> <p>Checkbox: This displays a "check box" next to the Product on the Order Form Page (that uses the "List" Product Layout).</p> <p>TIP: This selection type is useful when an initial quantity of this Product is not necessary, or the Product quantity desired is typically "1". For example, an optional add-on Product.</p> <p>Quantity: This displays a field to enter a "quantity" on the Order Form Page.</p> <p>TIP: This selection type is typically used with the "Drop-down Selection" Page Layout, where the Customer might need to add a specific quantity of the Product to their Cart when shopping.</p>

Donation: This displays a blank field on the Order Form Page where the Customer can enter a dollar amount.

TIP: This selection type is used with the "List" Page Layout, and is useful for collecting donations and online giving, where Product quantity is always "1".

Selection Type:

Auto-Select: This selection type is used for Order Form Pages with "List" Product Layout when you don't want the Customer to have to check a check box or enter a quantity. The Product will automatically be added to the Order when the Customer clicks the submit button on the Order Form Page. Also, for this selection type, the Product will only be added to the Order if the Product does not already exist in the Order or the selected recipient (if Product is shippable). In other words, additional quantity will not be added if the Customer submits the Order Form multiple times.

Sets the initial quantity of this Product when it is added to the Cart.

Default Quantity:

TIP: If Selection Type (above) is set the "Quantity", this field should be set to "0".

If Selection Type is set to "Checkbox", "Donation", or "Auto-Select", this field should be set to "1".

Search Engine Optimization

This is the name that the system will use to link to this Product. The Catalog Name will appear in the address bar of the browser when a Visitor is viewing this Product. If you leave the Catalog Name blank, then the Short Description or Product ID (if Short Description is blank) will be used. A Catalog Name may not be used by another Product Group or Product.

Catalog Name:

If the Catalog Name that you entered is already in use then the system will automatically add a unique number to the end of the Catalog Name.

TIP: Search engines use the content that appears in addresses for ranking search results, so it is important to set a good Catalog Name.

Web Browser Title:

This is what is displayed at the top of the Visitor's browser window when they access a Catalog Detail Page.

Web Browser Description:

This is for the description of a Product that search engines will use for ranking search results. This description often appears in search results at a search engine website.

Web Browser Keywords:

This is for keywords that search engines will use for ranking search results. The search engines will attempt to match these keywords with their visitor's searches. Separate each keyword with a comma.

Inventory

Track Inventory:

To prevent this Product from being ordered when out of stock, or simply alert the Shopper that this Product is backordered and allow them to order anyway, select this option.

Enter the number of units in stock.

Inventory Quantity:

NOTE: This value is decremented automatically for each quantity of this Product when an order is placed.

Select this option if you want to allow this Product to be ordered, even if Inventory Quantity is zero. The Out of Stock Message will also be displayed.

Accept Backorders:

Deselect this option will prevent this Product from being added to a cart. This option will also add the Out of Stock Message to any product selection fields to warning shoppers that the item is out of stock, before they attempt to add it to their cart and get an error message.

Out of Stock Message:

Enter the information to display when the Inventory Quantity reaches zero.

Order Checkout Options

If this Product requires another Product to be added to the same Order before the Order can be placed, select the Product ID.

Requires Product:	<p>NOTE: If the Customer adds this Product to their Cart and proceeds to checkout, and the Required Product is not also present in the Cart, then the Required Product will be added to the Cart automatically and a message will be displayed informing the Customer about the Required Product.</p>
Enable Product Form:	<p>TIP: Useful if you cannot bundle two Product together into a single Product.</p> <p>Check this box if you want to require a custom Product Form to be submitted when this Product is ordered. You can specify whether you want one Product Form collected for this Product, or if you want a Product Form collected for each quantity of the Product ordered. Product Forms work just like Custom Forms, only their data is stored with the Order itself. Product Form data is viewed and exported with the Order data.</p> <p>NOTE: To create and edit your Product Form, enable it first, then save the Product. Re-edit the Product and you will see a "Edit Product Form" button at the top of this screen that will provide access to the form fields.</p>
Form Title for Display	<p>TIP: This feature is ideal for fee-based event/course registrations where you need to gather contact information on each attendee.</p> <p>This is the Title of the Product Form that is displayed on top of the Product Form fields on the Order Form Page, Shopping Cart Page, and Express Checkout Page.</p>
Label Column Width:	<p>Specify the numerical width of the label column (in percentage) for the display of the Product Form.</p> <p>NOTE: The default (blank value) sets the width to "auto" which works well in most cases. Specify the number of Product Forms that must be completed before an Order containing this Product is allowed to be placed by the Customer.</p>
Quantity Type:	<p>One form per quantity: For example, if the Product quantity for the entire Order is 10, then 10 copies of the Product Form are displayed and required.</p> <p>One form per product: For example, if the Product quantity for the entire Order is 10, then only 1 copy of the Product Form is displayed and required.</p> <p>Order Complete Options</p> <p>Specify any optional message that will appear on the Order Receipt Page and in the order receipt e-mail when this Product is ordered. If the order receipt e-mail format is set to plain text, then this message will be automatically converted to plain text for the e-mail.</p>
Order Receipt Page Message:	<p>TIP: This is a great feature to add work-flow to your post-order process. You could display a link to a survey (using a Custom Form Page) after they successfully order this Product. Or, if access to a Folder or Membership is granted by this Product, you could include a welcome message and a link to a Page in that Folder so they can get started.</p> <p>If you would like to e-mail a Blind Carbon Copy (BCC) of the order receipt to a specific person whenever a specific Product is ordered, then specify it here.</p>
Order Receipt BCC E-mail Address:	<p>NOTE: The Commerce E-mail Address in the Site Settings will automatically be BCC'd for all order receipts.</p> <p>Specify an optional Page to e-mail the Customer when this Product is successfully ordered. (The Page's Title field is used as the e-mail message's Subject).</p>
E-mail Additional Page to Customer:	<p>TIP: This features makes it easy to send instructions, a welcome message, or other information to the Customer after they have ordered this Product successfully.</p> <p>NOTE: This is different from the order receipt that can be sent to the Customer. Check the Express Order or Order Preview page type properties for that.</p>

BCC E-mail Address:	<p>If you want to e-mail a Blind Carbon Copy (BCC) of the additional page that was selected above to another e-mail address when this Product is ordered, specify it here.</p> <p>If you want to add this Customer's Contact to a Contact Group when this Product is ordered, specify the Contact Group.</p>
Add to Contact Group:	<p>TIP: You can use this feature to organize all of your Customer's in one Contact Group that have ordered this Product. Then use that Contact Group in an e-mail Campaign.</p> <p>If you want to grant "view" access to the contents of all Membership Folders to the Customer when they order this Product, or extend any existing Member's Expiration Date, enter the number of days.</p> <p>New Members: If the Customer's Contact does not already have a Member ID, then the Order's unique Reference Code will be used as the default Member's ID, and the Contact's Expiration Date will be set to the order date plus the number of days specified here.</p> <p>Existing Members: If the Customer's Contact already has a Member ID, then it will remain unchanged, and the Contact's Expiration Date will be set to the order date plus the number of days specified here, regardless of previous value in the Expiration Date.</p>
Add Days to Customer's Membership:	<p>NOTE: Either way, the Customer will now have instant access to the Pages and Files in any Membership Folder.</p> <p>TIP: This is useful for creating paid subscriptions, where you want to automatically granting access to private areas of the website for some period of time. If you want to grant a long-term membership access, then please use a large value (e.g. 9999).</p> <p>NOTE: You can revoke this access anytime by updating the Expiration Date in the Customer's Contact to a past date. Likewise, you can extend the Member's expiration at anytime by changing the expiration date to a future date.</p> <p>NOTE: The number of days that are entered for this field will be multiplied by the quantity that is ordered. For example, if a Customer orders 2 of this Product and this field is set to 365 for a 1 year membership, then 2 years will be granted.</p>
Grant Private Access to Customer:	<p>If you want to grant "view" access to the contents of a Private Folder to the Customer when they order this Product, check this box.</p> <p>NOTE: You can make changes to a Customer's access via the Customer's User account.</p>
Set "View" Access to Folder:	<p>Specify the Private Folder where all the restricted Pages and Files reside that you want the Customer to be able to view.</p> <p>Enter the number of days of private access that should be granted to the User. You can leave this field blank if you do not want the access to expire.</p>
Length:	<p>At the time of the order, the length will be converted into an expiration date which can be managed in the User record. If the User does not already have access or his/her access has expired, then the number of days will be added to the order date. Otherwise, if the User already has access and there is a current expiration date in the future, then the number of days will be added to the current expiration date.</p> <p>The number of days that are entered for this field will be multiplied by the quantity that is ordered. For example, if a Customer orders 2 of this Product and this field is set to 365, for a year, then 730 days (i.e. 2 years) will be granted.</p> <p>A User's existing access length will never be reduced by this feature. For example, if a User already has indefinite access for a specific Folder and orders a Product that has a length defined for that same Folder, then the User's indefinite access will be preserved (i.e. no</p>

expiration date will be set).

You can also specify/update the Customer's "Start Page" when this Product is ordered, sending the Customer to a specific Page each time they login to the website.

Set Customer's
Start Page to:

TIP: You might use this to send your Members to a restricted Members Home Page each time return to your website and login.

Reward Points:

NOTE: You can update the Customers Start Page at any time, by updating their User account.
If you enable the Reward Program feature in Site Settings, then enter the number of reward points that are accumulated by each User that orders a single quantity of this Product.

Product Notes for Order Exporting

Enter any additional comments that you would like to store with each Order that contains this Product.

Notes:

TIP: Use this field to add information to Order that might be valuable to your fulfillment process of this Product.

NOTE: These Notes are not visible on any website Pages. Notes can be viewed through the Control Panel, and are exported with the Orders.

RSS Feed

The following fields are included in the RSS feed for Catalog, Catalog Detail, and Order Form Pages. These fields are not used by this system, however they might be required in a Google data feed for importing into Google Merchant Center.

In addition to the fields below, your inventory settings will affect the availability value in the RSS feed. If inventory tracking is disabled or inventory quantity is greater than 0, then the availability will be set to "in stock". If inventory quantity is set to 0 and accept backorders is disabled, then the availability will be set to "out of stock". Otherwise, if backorders is enabled, then availability will be set to "available for order". This system does not use the "preorder" value.

If a Product is currently discounted by an Offer, then the sale price will be included in the RSS feed.

Google Product
Category:

Enter the Google product category for this Product (e.g. Apparel & Accessories > Clothing > Dresses). You should not escape special characters, because special characters will be automatically escaped for you in the RSS feed. For example, enter ">", not ">". Also, please do not surround the value in quotes. Please reference the [list of valid product categories at Google's website](#). Google does not allow you to make up your own categories.

GTIN:

Enter the Global Trade Item Number (GTIN) for this Product. The GTIN might be a UPC (in North America), EAN (in Europe), JAN (in Japan), or ISBN (for books).

Brand:

Enter the brand for this Product.

MPN:

Enter the manufacturer product number for this Product (i.e. the number which uniquely identifies the Product to its manufacturer).

NOTE: When you save changes to the Product, all Catalog Pages & Order Form Pages that reference a Product Group that this Product is placed into, will be updated instantly.

Import Products

You can Import Products into the system from any Comma Separated Values (CSV) File. CSV file format is a universally accepted way to move data between systems. Most spreadsheet programs and databases can save data as a CSV text file so it is an ideal way to upload and create Products automatically in the system.

Select Formatted Text File to Upload

CSV File:

Click on the [Browse] button to select a CSV text file from your local computer that contains the Products that you wish to import.

NOTE: You do not need to import all the available columns.

Import Options

Update Existing Products:

Select this option if you want to update (overwrite) existing Products with the same Product ID found in your import file.

Import from CSV file

The easiest way is to get your data into columns in a spreadsheet. You may import Products by uploading a CSV file. You can save a CSV file from Microsoft Excel. Here are the guidelines for the CSV file:

- The first row of the CSV file must contain the names of the columns that you wish to import data for.
- You may use any number of columns from the list below.
- Columns can be listed in any order.
- If you are saving a CSV file on a Mac, you might need to select the "Windows CSV" format in Excel.

Available Columns

Here is the list of the valid Product Properties that you can import. Place one of the following on the first row of each of your data columns:

Column

name

short_description

full_description

details

code

keywords

image_name

price

taxable

selection_type

default_quantity

address_name

title

meta_description

meta_keywords

Instructions

This is the Product ID / SKU.

Use HTML.

Use HTML.

Use HTML.

Name of an uploaded File in the system (e.g. "example.jpg"). You can mass-upload images by uploading a zip file in the Files tab.

Amount without a dollar sign (e.g. "1.99", not "\$1.99").

"0" to disable or "1" to enable.

"checkbox", "quantity", "donation", or "autoselect".

This is the Catalog Name.

inventory	"0" to disable or "1" to enable inventory tracking.
inventory_quantity	
backorder	"0" to disable or "1" to enable.
out_of_stock_message	Use HTML.
required_product_id	
form	"0" to disable or "1" to enable.
form_name	
form_label_column_width	Percentage without a percent sign (e.g. "30", not "30%", leave blank for auto).
form_quantity_type	"One Form per Quantity" or "One Form per Product".
shippable	"0" to disable or "1" to enable.
primary_weight_points	
secondary_weight_points	
preparation_time	
free_shipping	"0" to disable or "1" to enable.
extra_shipping_cost	Amount without a dollar sign (e.g. "1.99", not "\$1.99").
commissionable	"0" to disable or "1" to enable.
commission_rate_limit	Percentage without a percent sign (e.g. "10.00", not "10.00%").
order_receipt_message	Use HTML.
order_receipt_bcc_email_address	
email_page_id	
email_bcc_email_address	
recurring	"0" to disable or "1" to enable.
recurring_schedule_editable_by_customer	"0" to disable or "1" to enable.
recurring_days_before_start	
recurring_number_of_payments	
recurring_payment_period	"Monthly", "Weekly", "Every Two Weeks", "Twice every Month", "Every Four Weeks", "Quarterly", "Twice every Year", or "Yearly" (leave blank for none).
recurring_profile_disabled_perform_actions	"0" to disable or "1" to enable.
recurring_profile_disabled_expire_membership	"0" to disable or "1" to enable.
recurring_profile_disabled_revoke_private_access	"0" to disable or "1" to enable.
recurring_profile_disabled_email	"0" to disable or "1" to enable.
recurring_profile_disabled_email_subject	
recurring_profile_disabled_email_page_id	
recurring_sage_group_id	Recurring group ID from Sage payment gateway (0 or blank to create new group for each order)
contact_group_id	
membership_renewal	Number of days (0 or blank for none).
grant_private_access	"0" to disable or "1" to enable.
private_folder_id	
private_days	Number of days (0 or blank for no expiration).
start_page_id	
reward_points	
notes	
google_product_category	
gtin	

brand
mpn

All Product Groups

Product Groups are simply collections of Products. Products are grouped into Product Groups for display purposes only.

Products can be are organized in one or more Product Groups. Product Groups are then referenced by Commerce Pages to display Products on your website:

- By associating a Product Group with a Catalog Page, you provide a Visitor with access navigate an entire hierarchy of Product Groups and their Products. If you then connect a Catalog Page to a Catalog Detail Page, you provide a Visitor with not only access to navigate an entire hierarchy of Product Groups and their Products, but also the ability to add any of the Products viewed into their Cart and place an Order securely.
- By associating a Product Group with an Order Form Page, you provide a Visitor with access to see the Product, as well as the ability to Add the Product to their Cart, checkout, and purchase the Product through your website.
- By associating a Product Group with a Shopping Cart or Express Order Page (Quick Add Product Group feature) you can display additional "up-sell" Products to a Customer before they checkout.

If you place any Products into Product Groups that are not referenced by a Commerce Page, then the Products will not be visible to your Visitors and considered unpublished.

WARNING: Catalog Pages are dynamic in nature, meaning that a single Catalog Page (and optional Catalog Detail Page) are capable of displaying your entire hierarchy of Product Groups and Products. You need to be sure when you move Products and Product Groups around in your Product Group hierarchies, that you are careful not to expose wholesale or unpublished Products to your other Customers accidentally.

Creating Product Groups

Click "Create Product Group" to create a new Product Group.

Moving Product Groups

Click on the Product Group Name to edit the Product Group and change it's Parent Product Group.

Updating Product Groups

Click on the Product Group Name to add or remove Products and Product Groups from the Product Group.

Deleting Product Groups

Click on the Product Group Name to edit the Product Group, then click "Delete" to delete the Product Group.

NOTE: Deleting a Product Group does not delete any children Product Groups, Products, or Commerce Pages. However, any Commerce Pages that reference the deleted Product Group will no longer display any Products and so they will need to be updated or removed as well.

Create/Edit Product Group

This screen displays the details of a Product Group.

Product Group Name

Name: The Name of the Product Group.

Catalog Page Display Options

Parent Product Group: This is the Product Group that this Product Group will be placed into.

Short Description: This is the brief description of the Product Group, and displayed by the Catalog Pages.

Full Description: This is a full description of the Product Group, and displayed by the Catalog Pages.

Display Type: Specify whether the items in this Product Group should be displayed on a Catalog page or should be grouped together in a pick list for selection on a Catalog Detail page. For example, this might be a Product Group that contains other Product Groups and/or Products that are not highly related, so you would want the items to be displayed on a Catalog Page, so a Customer could browse to them separately. Alternatively, this might be a Product Group that only contains highly related products (e.g. Small Shirt, Medium Shirt, Large Shirt), so you would want the products to be displayed together in a pick list on a Catalog Detail page.

This is the details of the Product Group that appear on catalog detail pages.

Details: This field is only displayed when the Display Type is set to "Display contents for selection on catalog detail page".

This field is for HTML, JavaScript, or other code that will be outputted at the bottom of Catalog or Catalog Detail pages (below the table of items on Catalog Pages or below details on Catalog Detail Pages). This field is useful for code that can't easily be added to the full description or details

Code: because those fields use a rich-text editor.

TIP: You can use this field in order to paste conversion/tracking code from analytics or advertising services.

Enter an optional list of keywords (e.g. tags) for this Product Group that will be used to promote this Product Group in both the Site Search and Catalog Page Search results.

Search Keywords are displayed as hyperlinks on the Catalog and Catalog Detail pages whenever this Product Group is displayed. When clicked by a Visitor, these hyperlinks will search within the scope of the Catalog page (defined by it's Parent Product Group) and will display any other Product Groups and Products that contain data that matches the Search Keyword.

NOTE: This field is only displayed when the Display Type is set to "Display contents for selection on catalog detail page".

Search Keywords:

NOTE: The keywords in this field will be added to the Tag Cloud if this Product Group is included in any Product Groups that are being searched by a Search Results page.

TIP: Even if there is no Site Search or Catalog Search enabled on your site, Visitors will still be able to click on any Search Keyword hyperlinks. This may be useful if you want to control what keyword searches they can perform.

TIP: You might not need to enter Search Keywords for this Product Group if Search Keywords have already been entered for all of the Products in this Product Group (since the Products will be searched too).

This is a thumbnail image that is used for catalog pages.

Image:

For example: If this Product Group is a group of office chairs for sale, then you would want an image of a group of chairs.

Search Engine Optimization

This is the name that the system will use to create the URL link to this Product Group. The Catalog Name will appear in the address bar of the browser when a Visitor is viewing this Product Group. If you leave the Catalog Name blank, then the Short Description or Product Group Name (if Short Description is blank) will be used.

Catalog
Name:

A Catalog Name may not be used by another Product Group or Product. If the Catalog Name that you entered is already in use then the system will automatically add a unique number to the end of the Catalog Name.

Example: A Catalog Name of "electronics" would result in a Search Engine Friendly URL to one of the Product Group's Products named "boombox" to be "/electronics/boombox".

TIP: Search engines use the content that appears in addresses for ranking search results, so it is important to set a good Catalog Name.

Web Browser
Title:

This is what is displayed at the top of the Visitor's browser window when they access a Catalog or Catalog Detail Page.

Web Browser
Description:

This is for the description of a Product Group that search engines will use for ranking search results. This description often appears in search results at a search engine website.

Web Browser
Keywords:

This is for keywords that search engines will use for ranking search results. The search engines will attempt to match these keywords with their visitor's searches. Separate each keyword with a comma.

Products to Include

Select all Products to include in this Product Group.

Select:

TIP: To make an item that is out of stock or unavailable, but still viewable on Dynamic Catalog pages, do not select any Products to Include, and then set the Display Type to "Display contents for selection on catalog detail page". This will prevent the customer from purchasing the product, but allows them to view its details.

Edit Featured & New Items

Featured items are Product Groups and Products that you want to highlight on Catalog Pages. Similarly, new items are new Product Groups and Products that you want to highlight on Catalog Pages.

In order to set featured items, you may enter a sort order number for the Product Groups and Products that you want to feature. Items with a lower featured order will be displayed first. It is recommended that you leave gaps in featured order numbers, in order to be able to easily reorder featured items in the future (e.g. 100, 110, 120).

In order to set new items, you may enter a date (format: mm/dd/yyyy) for Product Groups and Products that you want to display as new items. Newer items will be displayed first, and older items will be displayed last. New items with dates in the future will not be displayed as new items until the dates are no longer in the future.

As a Customer browses through a catalog, featured and new items from the current product group and all sub-product groups can be shown. For example, if a customer is currently browsing in the top-level product group (e.g. Electronics), then featured and new items in that product group and all sub-product groups (e.g. TV's, Cameras) can be shown. It is important to understand this when entering featured order numbers, because featured orders numbers are compared across the product group hierarchy and not just in a single level of the hierarchy.

The top featured item or newest item, if there are no featured items, is highlighted more strongly on a Catalog Page. This means that more information (e.g. full description) is displayed about that item on a Catalog Page.

After setting featured and new items on this screen, you must enter a "Number of Featured Items" and a "Number of New Items" for the page properties for a Catalog Page, so that the featured and new items are displayed.

TIP: You can use this feature to not only to create a dynamically changing catalog of products, but also to create a dynamically changing catalog of media! To do this, simply create a product for each media item, set it's Price to \$0.00, and set it's Selection Type to "Donation". This will surpress the ecommerce features. Additionally, if you want to display the media, and sell a full-length version, you can easily update the Price, and your media items can be purchased online.

All Offers

This screen displays any Offers. Offers are dollar discounts on Orders.

You can add an Offer at any time. Make the Offer enabled, or time sensitive, and add triggers to indicate when they are available and when they are revealed to the Customers.

Offers can apply to a entire Cart, each Recipient in a Cart, or to one or more Products in a Cart.

Offers work by specifying the Offer Rules, and if the Customer's Cart meets the Offer Rule, then Offer Actions can be applied to the Cart by the Customer, or automatically by the website.

All Offers can share Offer Rules and Offer Actions. An Offer can only have one Offer Rule, but it can have multiple Offer Actions.

Each time a Customer adds or removes Products from their Cart, all Offers are re-evaluated and applicable Offers are applied.

Offers can be available to a Customer based on whether an Offer Code or Key Code has been entered by the Customer.

Some Offers can be made available only after the Customer has placed specific Products in their Cart, or when their Order subtotal reaches a predefined amount.

Some Offers require the Customer to enter an Offer Code or Key Code during the checkout process, while other Orders do not.

Some Offers will require interactivity with the Customer. This happens automatically. So if the Offer's action is to add a shippable Product to the Cart, and there are multiple recipients in the Cart, then the Customer will be prompted to select the recipient that will receive the shippable Product.

NOTE: Free shippable Products Offers must be applied to a recipient with an Order subtotal greater than \$0. All Offers that add a free shippable Product to a Cart will also suppress any shipping charges associated with the Product, regardless of the Shipping Method selected.

Offers are calculated and displayed on the Shopping Cart Page and the Express Order Page. This is also where the Customer will enter an Offer Code, if necessary.

Some Offers do not require a Customer to enter a Code during the checkout process. We call these "automatic" Offers. These Offers are applied automatically to any Cart that satisfies an enabled Offer's Rule. An example of an automatic Offer would be a quantity discount for one or more Products. More than one automatic Offer can be applied to an Order.

Some Offers require that the Customer enter an Offer Code or Key Code during the checkout process to make the Offer available to them. We call these "manual" Offers. Only one manual Offer code can be applied to an Order at a time. Only the Offers tied to one Offer Code may be applied to a Cart at any one time. If a Customer enters a Offer Code after already entering a different Offer Code, only the the Offer associated with the most recent Offer Code entered will be applied to the Cart.

You can group Offers together by giving them the same code. If the group of Offers all have "Only Apply Best Offer" checked, then the system will only apply the best Offer from the group. Alternatively, if "Only Apply Best Offer" is not checked then all of the Offers will be applied. The former allows you to setup offers where only one offer will be given based on order levels (e.g. increasingly better free product at higher order levels). The latter allows multiple Offers to be applied when a customer enters a single Offer code. It is important that all Offers in a group have the same setting for "Only Apply Best Offer".

Up-selling Offers

Some Offers are published on your website or in your direct mail campaigns, but there may also be a need to provide unpublished, point of purchase incentives once the Customer begins to checkout on your website. This process is called "up-selling".

To better understand up-selling, here is an example: When you visit your local grocery store, add all of the items into your shopping basket that you came for, you make your way to the checkout line. This area of the store is usually lined with in-store promotions designed to entice you into buying more from them at the point of purchase. This is a proven and effective method of increasing the average order amount, which is important to the success of the store.

In the system, you can create very intelligent up-selling triggers using Offers, allowing your website to do the up-selling for you, based on what Products each Customer has already placed in their Cart, or by the Cart's current subtotal amount, so:

- When the Cart subtotal reaches a specific dollar amount, offer the Customer a deeper discount if they order more. When the Cart subtotal reaches an even higher specific dollar amount, offer the Customer an even deeper discount if they order more, and so on.
- When the quantity of a Product is close to a certain level, offer the Customer a deeper discount to if the Customer increases the quantity. When the quantity of a Product reaches an even higher number, offer the Customer an even deeper discount if the Customer increases the quantity, and so on.

To create an Offer, click on "Create Offer".

TIP: Because Offers are linked to existing Offer Rules and Offer Actions, create your Offer Rules first, then your Offer Actions, then your Offers.

Create/Edit Offer

This screen displays the properties associated with an Offer.

New Offer Code for Redemption & Order Reporting

If you want to require a Code, enter the optional value here that the Customer must enter during the checkout process to make this Offer available.

Offer Code: For example: "123456" or "BESTOFFER" or "Customer34SpecialPrice".

TIP: If you need to assign many different codes to this Offer, use Key Codes.

Commerce Pages Display Options

Message: Enter a text message that will be displayed to the Customer during the checkout process and on the Order Receipt Page, whenever this Offer has been successfully applied.

Offer Terms & Conditions

Offer Rule: Select any existing Offer Rule that must be satisfied before this Offer can be applied to a Cart. You may leave this pick list unselected if there is no Offer Rule for this Offer.

Offer Actions: Select one or more existing Offer Actions that will be applied to the Cart (once the Offer Rule is satisfied).

Require Code: Check this box to require the Customer to enter this Offer's Code or Key Code to make this Offer available to them.

Offer Up-sell Display Options

Display Up-sell Message: Check this box to display to enable the Up-sell Message feature for this Offer.

Enter the text message that will alert the Customer that they are "close" to meeting the Offer Rules and what is required to meet the rules so that this Offer can be available to them. This Up-sell Message will be displayed at the top of the Shopping Cart Page or Express Order Page.

Up-sell Message: NOTE: If the Up-sell Triggers (below) have been satisfied, this message will be displayed. This does not mean that the Offer is applied to the Cart. It simply means that the Customer has almost satisfied the Offer Rules, so they are notified that this Offer is available to them to act on.

Triggers: Subtotal within: Specify how close that a Customer's Order Subtotal must be to the Offer Rule's amount requirements before the Up-sell Message is displayed.

and/or Quantity within: Specify how close (in quantity) that a Product in the Cart must be to the Offer Rule's Product quantity requirements before the Up-sell Message is displayed.

Action Button Label: Specify the text that will be placed within the button (linked to the optional Action Page) that will be displayed next to the Up-sell Message.

For example: "Offer Info", or "Product Details".

Select the Page that the Customer will be directed to when they click the Action Button.

TIP: Use this feature if you want to link the Customer to a Page:

Action Page:

- with more information about this Offer
- with more information about unpublished Offers available to them
- that is an Order Form Page where they can add the Product to their Cart that satisfies the Order Rule, which in turn would apply the Offer to their Cart instantly

NOTE: The Action Page will appear in a new browser window so that it does not distract the

Customer away from the beginning of the checkout process.

Apply Offer to Order or each Recipient

Order: This Offer will apply to the entire Cart.

Recipient: This Offer will apply to each recipient in the Cart.

Scope:

NOTE: The Scope is only used when the Offer Rule checks for a required Product quantity and the Offer Action either discounts a Product, adds a Product, or discounts Shipping. The Scope is not used when the Offer Rule checks for a required subtotal or the Offer Action discounts the order.

Allow offer to be applied to multiple recipients:

You can allow a Customer to apply an offer to multiple recipients.

NOTE: This property is only used if the Offer Action adds a Product to the Cart.

Offer Availability

Start Date:

Enter the starting date that the Offer is valid (enabled). The Offer will be valid at 12:00am on this date.

End Date:

Enter the ending date when the Offer will expire (disabled). The Offer will expire after 11:59pm on this date.

You can enable or disable this Offer at any time. When disabled, this Offer is unavailable to anyone at anytime and no messages are displayed.

Status:

TIP: Disabling your Offers provides an easy way to keep your old Offers in the system for reference purposes, without the worry that someone might be able to act on it.

For Offers that Share this Offer's Code

Only Apply Best Offer:

You can group Offers together by giving them the same code. If the group of Offers all have "Only Apply Best Offer" checked, then the system will only apply the best Offer from the group. Alternatively, if "Only Apply Best Offer" is not checked then all of the Offers will be applied. The former allows you to setup offers where only one offer will be given based on order levels (e.g. increasingly better free product at higher order levels). The latter allows multiple Offers to be applied when a customer enters a single Offer code. It is important that all Offers in a group have the same setting for "Only Apply Best Offer".

NOTE: Codes must be alphanumeric, with no spaces. They are not case-sensitive.

All Offer Rules

This screen displays all Offer Rules. Offer Rules provide a way to match the contents on a Cart with a set of basic rules (or calculations) to determine if an Offer should be made available to the Customer.

Offer Rules can be shared by one or more Offers.

Offer Rules are very flexible, here are some of the many Offers you can make available to your Customers using Offer Rules:

- Offers can be applied to all Customers.
- Offers can be applied to all Customers that order a specific Product.
- Offers can be applied to all Customers that order a specific Product, and to each Recipient.
- Offers can be applied to all Customers that order within a specific date range.
- Offers can be applied to a group of Customers that order using a series of Key Codes.
- Offers can be applied to a group of Customers that order using a specific Offer Code.
- Offers can be applied to a specific Customer that orders using a specific Offer Code.
- Offers can be applied to a specific Customer that orders a certain quantity of a Product.
- Offers can be applied to a specific Customer that orders a certain quantity of a Product for each Recipient.
- Offers can be applied to a specific Customer that orders over a specific dollar amount.

To create an Offer Rule, click "Create Offer Rule".

Create/Edit Offer Rule

Offer

Offer Rule Name

Enter a descriptive name for this Offer Rule.

Offer Rule Name: For example: "Order more than \$100" or "Order 1 Widget, Get 1 Free".

NOTE: This is not displayed to the Customer.

Offer Rule Details

Required Subtotal (\$): Enter the subtotal dollar amount that a Cart must reach before this Offer Rule is satisfied.

and/or
Required Product: Enter the Product that must be present in a Cart.

Required Quantity: Enter the quantity of the Required Product that must be reached in a Cart before this Offer Rule is satisfied.

TIP: You can combine the Required Subtotal and Required Product/Quantity in your Offer Rule to create more specific rules.

All Offer Actions

This screen displays all Offer Actions. Offer Actions apply discounts to a Cart once the Offer requirements and Offer Rule is met. Offer Actions can be shared by one or more Offers.

Once an Offer's rules are met, the following Offer Actions can be applied to a Cart:

- Change the Order Subtotal by a % or \$ amount.
- Change the price of a Product by a % or \$ amount.
- Add/replace a Product and/or it's quantity.
- Change the shipping by a % for certain shipping methods.

To create an Offer Action, click "Create Offer Action".

Create/Edit Offer Action

This screen displays the details of the Offer Action.

Offer Action Name

Enter a descriptive name for this Offer Action.

Offer
Action
Name:

For example: "Take \$15 Off Entire Order" or "Give away free Product #123".

NOTE: The Offer Action Name is only displayed to the Customer if there is an Offer that contains multiple Offer Actions that add Products to the Cart, so the Customer understands which Product is being added to the Cart.

Offer Action Details

Discount Order: when applied, will change the Cart's Subtotal by the *Amount* or *Percentage* specified.

Discount Product: when applied, will change the price of the specified *Product* in the Cart (if found) by the *Amount* or *Percentage* specified.

Type:

Add Product: when applied, will increase or decrease the quantity of the specified *Product* in the Cart (if found) to match the specified *Quantity*. In addition, the *Product* price will also be changed by the *Discount Amount* or *Discount Percentage*.

TIP: To add a free Product, set the discount to 100%.

Discount Shipping: when applied, will change the Cart's Shipping by the *Percentage* specified. You can also set which shipping methods are allowed for this Offer Action.

All Key Codes

This screen displays all Key Codes.

Key Codes are simply aliases to an Offer Code, much like a nickname is an alias to a person's real name.

Key Codes are used when many Offer Codes need to be linked to a single Offer Code. This is typically used for catalog direct marketing and campaigns when a single Offer is advertised to large segmented customer list.

It is not practical to create hundreds or thousands of Offer Codes, each with the same benefit. It is also impossible to track the Offer's popularity within each customer segment on your Order Reports if you allowed all Customers to use only a single Offer Code.

TIP: Only the Key Codes should be published to each customer segment. The "master" Offer Codes should remain unpublished.

Creating Key Codes

You can all your Key Codes quickly by importing your Key Codes. Click on "Import Key Codes" and following instructions. You can also create Key Codes one at a time by clicking "Create Key Code".

Deleting Key Codes

Once your direct mail campaign and Offer has expired, you can delete all Key Codes associated with it. Click on "Delete All Key Codes".

NOTE: There is no undo, but if you used a Key Code import file to create your Key Codes in the first place, you can re-import them again to your Key Codes will be restored.

Create/Edit Key Code

This screen displays the details of a Key Code.

New Key Code for Redemption & Order Reporting

Key Code: Enter the Key Code that the Customer will enter during the checkout process.

Alias of existing Offer Code

Offer Code: Enter the Offer Code that is implied when this Key Code is entered by the Customer.

NOTE: Codes must be alphanumeric, with no spaces. They are not case-sensitive.

Import Key Codes

You may import key codes by uploading a CSV file. You can save a CSV file from Microsoft Excel. Here are the guidelines for the CSV file:

- The first row of the CSV file must contain the names of the columns that appear below.
- Columns can be listed in any order.
- Column names must be similar to those in the list below (i.e. "key_code" or "keycode" or "Key Code").
- If you are saving a CSV file on a Mac, you might need to select the "Windows CSV" format in Excel.

Available columns

- key_code
- offer_code

Select Formatted Text File to Upload

CSV File: Click on the [Browse] button to select a CSV text file from your local computer that contains the Key Codes that you wish to import.

Click "Import" to upload and import your Key Codes.

WARNING: Any existing Key Codes will be overwritten if their Key Codes match those being imported.

All Shipping Zones

This screen displays all Shipping Zones.

Shipping Zones are simply geographical physical address areas of all Countries and/or their States that your organization can ship Products too.

Shipping Zones can also adjust the shipping cost if some zones are more expensive to deliver too.

Shipping Zones are used by Shipping Methods (to determine if any carriers can deliver to the zone) and by shippable Products (to limit delivery areas to specific zones).

For each Shipping Zone, you can set the Base Rate, Primary Weight Rate, Secondary Weight Rate, Item Rate in order to affect the cost of shipping to a Shipping Zone. These values are used in association with the similar Properties in the Shipping Methods and Products.

NOTE: Shipping Methods can share Shipping Zones but typically do not share costs (there is a per item rate if this is required for your exceptions).

TIP: Typically Shipping Zones do not overlay each other. However, if you have complex shipping cost formulas, overlaying Shipping Zones will allow you to create many fee variations.

To create a Shipping Zone, click "Create Shipping Zone".

Create/Edit Shipping Zone

This screen displays a Shipping Zone's area and optional rates.

Shipping Zone Name

Shipping Zone Name: This is the name for the Shipping Zone.

Shipping Zone Fees

Base Rate (\$): This value is the starting rate for the Shipping Zone. It is not affected by Product quantities. This value is multiplied by each Quantity of each Product's Primary Weigh Points for the recipient.

Primary Weight Rate (\$): For example: If you wanted to charge \$12.00 to ship a certain product in this Shipping Zone, you would set the Product's Primary Points to 1200 and set this value to 1. This value is multiplied by each Quantity of each Product's Secondary Weigh Points for the recipient.

Secondary Weight Rate (\$): TIP: Use the Secondary Weigh Rate for any Products that need a different Weight Rate for a different Shipping Zone. This value is multiplied by each Quantity of all Products for the recipient.

Item Rate (\$): TIP: Use the Item Rate when a flat shipping rate must be applied to all quantities, regardless of the Product.

Shipping Zone Countries

Allowed Countries: Select the Countries that this Shipping Zone will apply too.

Disallowed Countries: Select the Countries that this Shipping Zone will never apply too.

Shipping Zone States or Provinces

Allowed States: Select the State/Province that this Shipping Zone will apply too.

Disallowed States: Select the State/Province that this Shipping Zone will never apply too.

TIP: You may need to divide up your Shipping Zones into new, smaller Shipping Zones to accommodate more complex shipping fee structures.

Shipping Methods

This screen displays all Shipping Methods.

Shipping Methods define each shipping carrier and their methods of shipment, and the fees for each based on the available Shipping Zone for each Shipping Method.

For each Shipping Method, you can set Base Rate, Primary Weight Rate, Secondary Weight Rate and an Item Rate in order to determine the cost of shipping.

Shipping Methods are displayed on the Shipping Methods Page. All available Shipping Methods that can deliver the Products to each destination are always displayed to the Customer starting with the least expensive first.

Guaranteed Arrival Dates

For Each Shipping Method you can also set the number of day the shipment is in transit. These transit days are important if you are using the optional Arrival Date feature and therefore only offer the Customer the Shipping Methods that you can guarantee will deliver the Products to the recipients on time. Transit days can also be impacted by the destination Country so you can also adjust the transit days for any Country.

Base Transit Days is used in determining the number of transit days (calendar days) for that Shipping Method. If Adjust Transit is checked, then the Transit Adjust Days for the Country of the recipient will be added to the Base Transit Days of the Shipping Method.

If a Shipping Cut-off is configured for an Arrival Date, then the Preparation Time for Products, transit values for Shipping Methods, and Transit Adjustment Days for Countries are all ignored.

Street Address & Post Office Box Delivery

If Allow Street Address is checked then this Shipping Method may be available for a recipient with a street address. (This is determined by a shipping address entered by the Customer starting with a numeric character).

If Allow PO Box is checked then this Shipping Method may be available for a recipient with a PO box (shipping address entered starts with a non-numeric character).

You will also need to set the Allowed Zones that this Shipping Method can deliver too.

Shipping Selection Process

1) The Customer selects the "Check Out" button from the Shopping Cart Page or the Express Order Page.

The Cart's "Next Page (with shipping)" Page will be displayed if there are shippable Products in the Cart. This Next Page should be a Shipping Address & Arrival Page. This Shipping Address & Arrival Page will be shown for each recipient in the Cart.

2) The Customer will enter the shipping address and select a Requested Arrival Date and press the "Continue" button.

If no Shipping Methods can be found that will guarantee arrival of the shipment by the Requested Arrival Date, the Shipping Address & Arrival Page will appear again with an error instructing the Customer to change his/her Requested Arrival Date and press "Continue" again.

3) If at least one Shipping Method is found, the Customer will be sent to the Shipping Method Page for the recipient.

If there is a Product in the Cart that is not allowed to be shipped to the recipient's Country or State, the Product Restriction Message is displayed to the Customer on the Shipping Methods Page and the Customer is required to remove the Product from the Cart in order to continue with the checkout process.

the system will look for all Shipping Methods for the recipient's address. the system will then refine the list of Shipping Methods to only those that can get the Products to the destination on or before the selected Requested Arrival Date.

4) If the Customer started the checkout process from a Shopping Cart Page, they will be directed to the Billing Information Page to enter their payment information and proceed to finalize their Order. If the Customer started the checkout process from an Express Order Page, they will be sent back to the Express Order Page to enter their payment information and proceed to finalize their Order.

Available Shipping Methods Calculation

It is important to understand how the system determines what Shipping Methods are available for each recipient during the checkout process. Here is the calculation, if there is no Shipping Cut-off for the Arrival Date:

Available Shipping Methods = Shipping Methods (ZONE MATCH): (longest Product:PreparationTime) + SHIP:BaseTransitDays + (If SHIP:AdjTransit = Y then CTRY:TransitAdjDays else 0) <= Days until Requested Arrival Date (adjusted for End of Day Time).

If there is a Shipping Cut-off for the selected Arrival Date, then the system will look at the Cut-off Date & Time in order to determine if the Shipping Method should still be available.

If one or more Available Shipping Methods are found then the shipping charges for each will be calculated and displayed to the Customer as follows:

Shipping Method Shipping Surcharge = (SHIP:BaseRate) + (ZONE:BaseRate) + For all non-Free Shipping Products: (Product:PrimaryWeightPoints * SHIP:PrimaryWeightRate * ProdQty) + (Product:SecondaryWeightPoints * SHIP:SecondaryWeightRate * ProdQty) + (SHIP:ItemRate * ProdQty) + (Product:PrimaryWeightPoints * ZONE:PrimaryWeightRate * ProdQty) + (Product:SecondaryWeightPoints * ZONE:SecondaryWeightRate * ProdQty) + (ZONE:ItemRate * ProdQty) + (Product:ExtraShippingCost * ProdQty)

TIP: The Extra Shipping Cost portion of the calculation above is generally used for Products that might require extra preparation time and/or expense.

NOTE: If no Shipping Methods can be found for the shipping address, an error message will be displayed on the Shipping Methods Page and the Customer will need to contact you. So it's a good idea to at least create one Shipping Method that covers all your Shipping Zones if that is the appropriate solution for you.

Create/Edit Shipping Method

This screen displays a Shipping Method's options and fees.

Shipping Method Code for Order Reporting

Enter the value that will be saved and exported with the Order data if this Shipping Method is used.

Code:

For example: "AIR"

Shipping Method Page Display Options

Enter the Name of this Shipping Method that is displayed to the Customer on the Shipping Methods Page.

Display Name:

For example: "FEDEX Overnight".

Enter This is the text information for this Shipping Method that is displayed to the Customer on the Shipping Methods Page.

Display
Message:

For example: "Overnight delivery will arrival by 10am the next business day."

Shipping Method Charges

Base Rate (\$): This value is the starting rate for the Shipping Method. It is not affected by Product quantities. This value is multiplied by each Quantity of each Product's Primary Weigh Points for the recipient.

Primary Weight
Rate (\$):

For example: If you wanted to charge \$12.00 ship a certain product via this Shipping Method, you would set the Product's Primary Points to 1200 and set this value to 1.

This value is multiplied by each Quantity of each Product's Secondary Weigh Points for the recipient.

Secondary
Weight Rate
(\$):

TIP: Use the Secondary Weigh Rate for any Products that need a different Weight Rate for a different Shipping Zone.

This value is multiplied by each Quantity of all Products for the recipient.

Item Rate (\$):

TIP: Use the Item Rate when a flat shipping rate must be applied to all quantities, regardless of the Product.

Destination Delivery Options

Check this box if this Shipping Method can deliver to a Street Address.

Allow Street
Address:

NOTE: A Street Address is determined by checking the first character in the Address Line 1 of the recipient's shipping address. If the first character is numeric, it is considered a Street Address, like "1234 Main Street".

Check this box if this Shipping Method can deliver to a Post Office Box.

Allow PO Box:

NOTE: A Post Office Box is determined by checking the first character in the Address Line 1 of the recipient's shipping address. If the first character is non-numeric, it is considered a PO Box, like "P.O. Box 1234".

Available Destinations

Allowed Zones: Select the Shipping Zones that this Shipping Method can deliver too.

Disallowed
Zones:

Select the Shipping Zones that this Shipping Method cannot deliver too.

Transit Details for Shipping Method

Enter the expected number of calendar days that it should take for the carrier to deliver the Products to the recipient using this Shipping Method.

Base Transit

Days:

This value and the rest of the transit values are ignored if Shipping Cut-offs are configured for an Arrival Date. Shipping Cut-offs override Preparation Time for Products, transit values for Shipping Methods, and Transit Adjustment Days for Countries.

Adjust Transit
for Country:

Check this box to add the Transit Days for the recipient's Country to the Base Transit Days.

Transit on
Sunday:

Check this box if the carrier of this Shipping Method typically continues to move shipments on Sunday.

Transit on
Saturday:

Check this box if the carrier of this Shipping Method typically continues to move shipments on Saturday.

Excluded
Transit Dates:

Enter any specific future calendar dates that the carrier of this Shipping Method does not move shipments (during labor holidays, Christmas, etc., each year).

Shipping Method Availability

Enter the date and time that this Shipping Method is available (enabled).

Start Time:

TIP: Start Time is great when you want to offer you Customers new shipping options automatically when you get too close to an popular arrival date (like a holiday or event) for other Shipping Methods to guarantee delivery in time.

Enter the date and time that this Shipping Method is no longer available (disabled).

End Time:

TIP: The End Time is great when you want to offer you Customers new shipping options automatically when you get too close to an popular arrival date (like a holiday or event) for other Shipping Methods to guarantee delivery in time.

Enabled makes this Shipping Method available.

Status:

Disabled makes this Shipping Method unavailable.

Available on: This specifies which days of the week this Shipping Method may be selected. The Cut-off time will disable the Shipping Method at the specified time on that day. You may leave the Cut-off time blank if you want the Shipping Method to be available all day.

NOTE: The Cut-off time is based on the web server's time.

NOTE: The Transit-related fields above are only required if you are using the Arrival Date feature. In that case, these values are compared against the Requested Arrival Date selected by the Customer to determine if this Shipping Method should be displayed to the Customer.

TIP: If you only create one Shipping Method, the Customer will not be prompted to select a Shipping Methods.

However, if only one Shipping Method is available that matches the Product to the Destination, the Customer will still be prompted to select the only option they have.

TIP: You may need to divide up your Shipping Methods into new, smaller Shipping Methods to accommodate more complex shipping fee structures.

All Shipping Arrival Dates

This screen displays all Arrival Dates used for shipping Products.

Arrival Dates allow you to offer your Customer the ability to select their Requested Arrival Date for each recipient in their Cart. This is very important if you are offering gifts for purchase and your customers need the Products to arrive on or before a special occasion (the recipient's birthday or anniversary, event, or a holiday).

The Arrival Dates you create and enable are displayed to the Customer on the Shipping and Arrival Page during the checkout process. If you do not want the customer to select an Arrival Date, then you may delete all Arrival Dates.

Creating Arrival Dates

Here are examples of the three types of Arrival Dates that you can create:

At Once: This type of arrival date is the default for most websites that ship their products as soon as possible and the arrival date is not important.

TIP: To create an "At Once" Arrival Date, set the Arrival Date field to "00/00/0000".

NOTE: If you create an "At Once" Arrival Date, all Shipping Methods that are available to deliver all Products to each recipient's address (each Product's Allowed Shipping Zones intersects with the Shipping Method's Allowed Shipping Zones), will be offer the the Customer, no matter how many transit days the deliver might take.

IMPORTANT: You should only have one "At Once" Arrival Date ("00/00/0000") enabled at any time on your website.

Christmas: This type of arrival date is for gift giving sites when the Product must arrive on or before a specific holiday. You can enable as many of these Arrival Dates as necessary at any time.

TIP: To create a "Christmas" Arrival Date, set the Arrival Date field to 12/25/XXXX (where XXXX is the current year).

NOTE: If you create a "Christmas" Arrival Date, only Shipping Methods that are available to deliver all Products to each recipient's address (each Product's Allowed Shipping Zone intersects with the Shipping Method's Allowed Shipping Zone), on or before 12/25/XXXX.

TIP: Arrival Date/Shipping Method combinations allows the website to automatically switch between "standard" or "expedited" Shipping Methods for your Customers when orders are placed close to the Requested Arrival Date (i.e. holiday). Going further, the website will not allow the Customer to order if they are attempting to place an Order too close to the Requested Arrival Date (i.e.holiday) and no Shipping Methods are found that can get the Products to the destination in time.

TIP: Use the Arrival Dates Start Date/End Date features to tell the website when to automatically remove and add Arrival Date options for your Customers. So when its too late to order for Christmas, that option can disappear and the option to order for Valentine's Day can appear. Using these features, you can preset many future occasions in advance.

Special Date: This type of arrival date is for gift giving sites when the Product must arrive on or before the Customer's own specific occasion (i.e. birthday, anniversary, event).

TIP: To create a "Special Date" Arrival Date, set the Arrival Date's Display Custom Field.

NOTE: If you create a "Special Date" Arrival Date, the Customer will be prompted to enter their own date, and only Shipping Methods that are available to deliver all Products to each recipient's address (each Product's Allowed Shipping Zone intersects with the Shipping Method's Allowed Shipping Zone), on or before the date entered by the Customer.

IMPORTANT: You should only have one Arrival Date using the "Display Custom Field" enabled at any time on your website.

Create/Edit Arrival Date

This screen displays the specific of an Arrival Date:

Arrival Date

Enter the Arrival Date that all available Shipping Methods will be checked against to see if they can deliver by this date.

Arrival Date:

TIP: To create an "At Once" Arrival Date, set this value to "00/00/0000".

To create a "Christmas" Arrival Date, set this value to 12/25/XXXX (where XXXX is the current year).

Or allow Customer to enter this Arrival Date during checkout

Display

Custom Field:

Check this box if you want to allow all Customers to enter their own Requested Arrival Date on the Shipping and Arrival Page.

TIP: You should only have one Arrival Date enabled as a Display Custom Field.

Latest Allowed
Arrival Date:

Enter a date for this field if you want to set the latest custom Arrival Date that a Customer is allowed to enter. You might want to use this feature if you want to prevent a Customer from selecting a date that is too far into the future, because product and/or shipping costs might be different at that point in time.

Arrival Date Code for Order Reporting

Arrival Date
Code:

Enter the code that will be saved and exported with the Order data if this Arrival Date is selected by the Customer.

For example: "XMAS".

Order Preview Page Display Options

Arrival Date
Name:

Enter the selection name displayed to the Customer on the Shipping and Arrival Page.

For example: "Christmas Day".

Arrival Date
Description:

Enter the description of this Arrival Date that will be displayed to the Customer on the Shipping and Arrival Page.

For example: "We guarantee your gift will arrive by Christmas Day."

Sort Order:

Enter the number that will be used to determine the display order of all enabled Arrival Dates displayed on the Shipping and Arrival Page.

For example: "1" would be displayed before "2".

Arrival Date Availability

Start Date:

The first date that this Arrival Date option is displayed to Customers on the Shipping and Arrival Page. This Arrival Date option will become available at 12:00 AM on the date that is entered here. Format is mm/dd/yyyy.

End Date:

The last date that this Arrival Date option is displayed to Customers on the Shipping Address & Arrival Page. This Arrival Date option will no longer be available at the "End of Day Time" (see Site Settings) on the date that is entered here. Format is mm/dd/yyyy.

Status
Override:

Whether this Arrival Date is enabled (displayed to the Customer) or not. The Status overrides the Start and End Dates.

Selected by
Default:

When the Shipping and Arrival Page is displayed to the Customer, this Arrival Date will be selected by default. There should only be one Arrival Date that has this set. If you want to "confirm" that the Customer actively selects an Arrival Date, don't set this option for any Arrival Dates on your Website.

Shipping Cut-offs

Shipping Cut-offs are generally used around holidays when you want to guarantee delivery before the holiday as long as Customers submit their Order by a certain date and time. Shipping Cut-offs override the Preparation Time for Products, transit values for Shipping Methods, and Transit Adjustment Days for Countries for a specific Arrival Date and Shipping Method.

For example, if you want to allow your Customers to select Standard shipping for Christmas delivery until 12/20/2010 3:00 PM, then you should create a Shipping Cut-off for the Christmas Arrival Date where the Shipping Method is set to Standard and the Cut-off Date & Time is 12/20/2010 3:00 PM. You can also create Shipping Cut-offs for other Shipping Methods (e.g. Express, Next Day).

Shipping
Method:

The Shipping Method that this Shipping Cut-off applies to.

Cut-off Date &
Time:

The date and time that the selected Shipping Method will be available until for this Arrival Date.
Format is mm/dd/yyyy hh:mm AM/PM.

IMPORTANT: You should only have one "At Once" Arrival Date ("00/00/0000") enabled at any time on your website. Also, you should only have one Arrival Date using the "Display Custom Field" enabled at any time on your website.

All Verified Shipping Addresses

This screen displays all the optional verified shipping addresses you may like to present to your Shoppers when they checkout.

Verified Shipping Addresses are ideal if your website commonly ships gifts to camps, or organizations where the exact shipping address may be unknown to the Shopper, or when shipments are common sent to organizations that have a preferred physical address where shipments are received.

When a Shopper reaches the Shipping Address & Arrival Page, if ANY Verified Shipping Addresses are defined, then the shopper will be presented with the option to use one of these Verified Shipping Addresses to pre-fill their shipping address fields. (So if you want to remove the verified shipping address area from your Shipping Address & Arrival Pages, please delete all the Verified Shipping Addresses found under the [Commerce] tab.

Creating Verified Shipping Addresses

You can create and assign Verified Shipping Addresses to any State/Province in any Country you have already defined within the "All Countries" and "All States" screens in the Commerce area of the Control Panel.

The Country selected as the default country (see "All Countries") will be selected when the Verified Shipping Address fields appear on the Shipping Address & Arrival Page.

Editing Verified Shipping Addresses

Click on the Verified Shipping Address to edit or delete it.

NOTE: If you don't want to display any Verified Shipping Addresses on your Shipping Address & Arrival Pages, then you need to delete all Verified Shipping Addresses.

Create/Edit Verified Shipping Address

This screen displays a Verified Shipping Address and its properties.

Company: Enter the name (or descriptive label) of the organization and or location that will be identifiable to the Shopper.

TIP: Don't make this label too long since it will be displayed in a pick list field.

Address 1: Enter the main address line of the Verified Shipping Address.

Address 2: Enter the secondary address line of the Verified Shipping Address. This is optional.

City: Enter the city or town of the Verified Shipping Address.

State: Select one of the existing States of the Verified Shipping Address.

Zip Code: Enter the zip code or postal code of the Verified Shipping Address.

All Tax Zones

This screen displays all Tax Zones.

Tax Zones are simply geographical physical address areas that your organization must collect tax from, for all or some of your Products.

Taxes are based on either the location of the Shipping Addresses of each Recipient, or the Billing Address of each Customer during the checkout process.

Taxes are calculated as a percentage of the Order Subtotal. Any shipping fees are excluded from tax calculations.

TIP: If some of your Customers are Tax-Exempt, you can prompt them during the checkout process and the Tax will not be calculated, displayed, or collected for that Order. Your Site Manager can enable this feature in the Site Settings.

TIP: If none of your Customers are taxable, or none of your Products are taxable, then you can completely disable tax from all Commerce Pages and Orders. Your Site Manager can enable this feature in the Site Settings.

IMPORTANT: Tax Zones must not overlay each other.

Creating Tax Zones

To create a Tax Zone, click "Create Tax Zone".

How Tax is Calculated

Both the Billing and/or the Shipping Addresses are considered in the calculation of tax for each Order. Only "taxable" Products will be included in any tax calculations.

For each taxable Product in the Cart, taxes will be accumulated as follows:

- For Products that are "shippable", the sum of all taxable Products for *each* recipient in the Cart is computed:
$$\text{Destination Tax} = ((\text{Product Price} - \text{Product Discount}) * \text{Product Quantity}) * \text{Tax Percentage from the Tax Zone of the Shipping Address}.$$
- For Products that are NOT "shippable", the sum of all taxable Products in the Cart is computed:
$$\text{Purchaser Tax} = ((\text{Product Price} - \text{Product Discount}) * \text{Product Quantity}) * \text{Tax Percentage from the Tax Zone of the Billing Address}$$

Therefore, the total Order Tax = Destination Tax + Purchaser Tax

Create/Edit Tax Zone

This screen displays a Tax Zone's area and tax rate.

Tax Zone Name

Tax Rate Name: This is the name for the Tax Zone.

Tax Rate (%): This is the percentage of the tax to apply to each Product item.

Tax Zone Countries

Allowed Countries: Select the Countries that this Tax Zone will apply too.

Disallowed Countries: Select the Countries that this Tax Zone will never apply too.

Tax Zone States/Provinces

Allowed States: Select the States/Provinces that this Tax Zone will apply too.

Disallowed States: Select the States/Provinces that this Tax Zone will never apply too.

All Countries

This screen displays all Countries.

Countries provide two geographical functions for the website.

First, they are used to define Shipping Zones, Product Shipping Zones, and Tax Zones.

Secondly, they are used to create the address entry fields that your Customer will use to enter their billing address and each recipient's shipping addresses.

The Billing Address is entered by the Customer

- during checkout on the Billing Information Page, or the Express Order Page, or the Order Preview Page.
- after they login and view their My Account information, and update their billing address on the Account Profile Page.

The Shipping Address is entered by the Customer

- during checkout on the Shipping Address & Arrival Page.
- after they login and view their My Account information, and update their shipping addresses on the Update Address Book Page.

TIP: If you don't accept orders or ship orders to more than one Country, you should delete all other Countries. Once you have done this, the website will no longer prompt the Customer for a Country selection. Instead, the sole Country in the system will be used by default, displayed for completeness, but will not be editable by the Customer.

IMPORTANT: If a Country does not have any States defined for it, the website will display a blank text area for the Customer to enter the State value themselves. This value will be saved and exported with the Order data.

Add/Edit Country

This screen displays a Country and it's properties.

Country Code for Order Reporting

Enter the value that will be saved and exported with the Order data if this Country is selected.

Code:

For example: "US".

Commerce Pages Display Options

Enter the name for this Country that will be displayed to the Customer on any billing or shipping address entry field.

Name:

For example: "United States".

Check this box if you want this Country to be the default selection displayed to the Customer on any billing or shipping address entry field.

Selected by

Default:

TIP: This feature is for the convenience of your main Customers. Only one Country should be selected as the default on your website, and typically this is the Country where your largest base of Customers reside.

Shipping Delays specific to this Country

Enter the number of extra calendar days it will take to deliver any Product to this Country.

TIP: Leaving this value blank is the same as zero extra calendar days.

Transit

Adjustment

Days:

NOTE: This is used by the Shipping Methods to determine the estimated Arrival Date. This is an optional value, added to the Arrival Date calculation only if the Adjust Transit Days is set in the Shipping Method selected by the Customer. This value is ignored if Shipping Cut-offs are configured for an Arrival Date. Shipping Cut-offs override Preparation Time for Products, transit values for Shipping Methods, and Transit Adjustment Days for Countries.

All States

This screen displays all States.

States provide two geographical functions for the website.

First, they are used to define Shipping Zones, Product Shipping Zones, and Tax Zones.

Secondly, they are used to create the address entry fields that your Customer will use to enter their billing address and each recipient's shipping addresses.

The Billing Address is entered by the Customer

- during checkout on the Billing Information Page, or the Express Order Page, or the Order Preview Page.
- after they login and view their My Account information, and update their billing address on the Account Profile Page.

The Shipping Address is entered by the Customer

- during checkout on the Shipping Address & Arrival Page.
- after they login and view their My Account information, and update their shipping addresses on the Update Address Book Page.

NOTE: The Country selected by the Customer affects the State selection list for the Customer. The website system uses this method to unclutter the State selections available to the Customer by displaying only the State choices within Country selected by the Customer.

IMPORTANT: If a Country does not have any States defined for it, the website will display a blank text area for the Customer to enter the State value themselves. This value will be saved and exported with the Order data.

Add/Edit State

This screen displays a County and it's properties.

State/Province Code for Order Reporting

Enter the value that will be saved and exported with the Order data if this State is selected.

Code:

For example: "TX".

State Name

Enter the name for this State that will be displayed to the Customer on any billing or shipping address entry field.

Name:

For example: "Texas".

Country

Select any existing Country that this State is geographically located within.

Country:

For example: "United States".

All Referral Sources

This screen displays any optional Referral Sources. By asking for a Referral Source helps your marketing or communications team learn how your Customers found out about your products and/or services.

Referral Sources are the selectable answers you provide to the question "How did you hear about us?".

This question is asked of each Customer on the Order Preview Page, or Express Order Page during the checkout process.

Examples of Referral Sources:

- Internet Search
- News Story
- A Customer
- A Friend
- Direct Mail
- Radio Ad
- Print Ad
- TV Ad
- Other

TIP: This feature is optional and can be disabled (and your Customers will not be prompted) simply by deleting all your Referral Sources from the system.

Create/Edit Referral Source

This screen displays a Referral Source and it's properties.

Referral Source for Order Reporting

Referral Source Code: Enter the value that will be saved and exported with the Order data if this Referral Source is selected.

For example: "tv-5-2332".

Order Preview Page Display Options

Referral Source Name: Enter the name for this Referral Source that will be displayed to the Customer as an answer to the question "How did you hear about us?" selection field.

For example: "Television Ad on Channel 5".

Sort Order: Enter the number that will be used to determine the display order of this Referral Source.

For example: "1" would be displayed before "2".

All Currencies

This screen displays all Currencies.

Currencies allow Customers to convert all dollar amounts into the Currency of their choice while viewing and navigating the Commerce Pages. This is ideal if you have foreign Customers that want to see your Product prices and Order Totals displayed in their own Currency.

Currencies are for display purposes only. This means that all calculations are still done in US Dollars, all payments are still collected in US Dollars, and all Orders are still stored and exported in US Dollars, regardless of the Currency selected by the Customer.

NOTE: The US Dollar is the default Currency that will be displayed to each Customer.

TIP: Any Currency that is selected by a Customer and used throughout their checkout process will be stored and exported with the Order data. This means you can also create Order Reports and track your Customers by the Currencies they prefer.

Adding Currencies

Click on "Add Currency" to add another Currency for your Customers to select while browsing your Commerce Pages.

IMPORTANT: To enable Currencies on your website, your Site Manager must select the Multi-Currency option in the Site Settings. Once enabled, the Currency selection field will be appear on the all Commerce Pages.

Updating Exchange Rates

There are three ways to update your Currencies Exchange Rates to US Dollars:

- Click on the Currency you wish to update, and enter a value in the Exchange Rate field.
- Click on the "Update Exchange Rates" and the website will refresh all rates, in real-time from Yahoo!* at <http://financial.yahoo.com>, and if not available, then from XE* at <http://www.xe.net>.
- Setup the web server to refresh all rates each day automatically from Yahoo!* at <http://financial.yahoo.com>, and if not available, then from XE at <http://www.xe.net>*. Please contact your Site Administrator if you would like to enable this feature.

*Disclaimer: We are not responsible in any way for the availability, accuracy, or timeliness of any third-party data.

Add/Edit Currency

This screen displays a Currency and it's properties.

Name:	Enter the name of this Currency that will be displayed on all Commerce Pages and selectable to the Customer. For Example: "US Dollars".
Code:	Enter this Currency code that will be stored and exported with the Order data. For Example: "USD".
Symbol:	Enter the symbol for this Currency. For example: "\$".
Exchange Rate:	The current rate of exchange for this Currency to the US Dollar. TIP: Use the "Update Exchange Rate" button on the "All Currencies" screen to update this value instantly. IMPORTANT: Don't alter this value by hand unless you are sure that it is not being updated automatically.

All Ads

This screen displays all Ads for the website.

Ads are common regions of shared content that can be rotated within one or more Pages.

You can add as many Ads to an Ad Region as you desire, and Ads can be displayed in any order.

Ads are displayed when assigned to an Ad Region. Ad Regions define the Ads' allowed content area (size), behavior, and location, on one or more Pages.

Creating & Editing Ads

To create a new Ad, click "Create Ad". At least one Ad Region must exist before any Ads can be created.

To edit an existing Ad, click on the name of the Ad.

NOTE: Users who have edit access to an Ad Region, Site Managers, Site Designers, and Site Administrators can create, edit, and delete Ads.

Displaying Ads

In order to display an Ad on a Page, the Ad must first be assigned to an Ad Region that appears on the Page. Ad Regions are created by Site Designers and referenced in Page Styles.

If a dynamic Ad Region contains more than one Ad, then previous & next buttons can appear which allow Visitors to browse through the Ads. Site Designers can enable/disable and position these buttons via the Theme Designer for System Themes or enable/disable, position, and style these buttons in the CSS for Custom Themes.

Create/Edit Ad

This screen displays an Ad and it's properties.

Ad Name

Ad Name: This is the name of the Ad.

This information is not displayed on any Page.

Insert Ad Content

Content: This is the content that will be displayed in any Page that references the Ad Region that this Ad is assigned too.

NOTE: Only Site Managers, Site Designers, and Site Administrators can edit Ads.

Assign to Ad Region

Assign this Ad to any exiting Ad Region.

Ad Region: TIP: Be mindful that the area of visible Ad Content may be restricted and may change depending on the Ad Region you select. This is typically done by the Web Designer so that the size of the Ad Content cannot alter any Page's layout.

NOTE: Ad Regions are either "Static" (they will display one Ad each time a Page is displayed), or "Dynamic" (they will display multiple Ads w/Labels each time a Page is displayed).

Dynamic Ad Region Display Options

This is the Label that is displayed as a navigation link to this Ad within the Ad Region.

Label: TIP: If you use numbers like "1", or "2" as a Label, be sure it matches the Sort Order (below).

NOTE: Labels are ONLY displayed within Ad Regions that are "Dynamic". They are hidden if the Ad Region is "Static". Labels can be styled, positioned, and even hidden using CSS by a Site Designer.

Sort Order: This is the order that this Ad is displayed within the Ad Region. Do not enter a value if you would like the order of the Ad to be randomly selected each time it's Ad Region is displayed.

NOTE: Sort Order is ONLY used for Ad Regions that are "Dynamic".

Add Caption on Top of Content

Caption: You have the option of adding a caption which will appear on a layer above the Ad. This is useful if your Ad contains a photo and you want to add some text about the photo. By default, the caption will appear at the bottom of the Ad. Captions can be styled, positioned, and even hidden using CSS by a Site Designer. Captions only appear for dynamic Ad Regions (not static). Also, captions will fade when the Ads switch regardless of whether the Ads slide or fade.

IMPORTANT: At least one Ad Region must be defined by a Site Designer before Ads can be created.

All Page Styles

This screen displays all of the Page Styles defined for the website, and whether or not they are being used by any Page or Folder.

Page Styles account for the "look and feel" of each Page, and can be defined at the Page level or the Folder level, so you can create one look for the entire website, or make each area of your website look different.

Page Styles control the overall layout of each Page, so it will define the number and location of the Menu Region, Common Regions, and Page Regions that are editable by your Site Managers and Content Managers.

Page Styles also define the location of any additional Designer Regions, Dynamic Regions, and Login Regions that only your Site Designers have access too.

Page Styles are the containers that hold the complete HTML page (HTML, javascript, CSS, images, etc.) that surround each Page and it's content.

To better understand Page Styles, consider this example: A print magazine might have the follow page layouts:

- Cover
- Table of Contents
- Articles
- Feature Story
- Advertisements

Even through there are only five layouts, an entire 120 page magazine can be built with them. This provides consistency in the design, and simplifies the printing process.

Page Styles work the same way, only for your website. So even if you have a 1,000 page website to build, you may only need four Page Styles:

- Home Page Style
- Interior Page Style
- Pop Up Page Style
- Contact Us Page Style

You can also create Mobile Page Styles so you can display any design or layout that best fits a mobile phone screens and the system will automatically detect the device and switch Page Styles. Two Page Styles can be made available for a Page to use. One for desktop (computers and tablets) visitors and one for mobile (phone) visitors. The system will automatically detect and switch Page Styles based on the device that accesses any web page on the site. We recommend that your Site Designer add a Mobile Switch Region to all Page Styles so any site visitors can choose which Page Style they wish to view regardless of the outcome of the automatic detection.

Of course, you can add as many Page Styles are you need for your website.

Searching Styles

You can enter a search term in the box on this screen and search for any Style by it's properties.

Creating Page Styles

To create a Page Style, click on "Create Page Style".

Modifying & Deleting Page Styles

You can modify or delete any Page Style that is not being used by a Page. For safely sake, the system will not allow you to delete a Page Style that is in use by a Page and it's content.

NOTE: It may be important to know that some javascript code snippets may be inserted into Page Styles dynamically as they render Pages. These code snippets provide support for built-in features including Who's Online, Chat, and Google Analytics. These snippets are designed to be compact and not interfere with any other valid code you decide to include in your Page Styles. However, no code snippets are included for Pages when they are sent as E-mail Campaigns as they can cause delivery or viewing issues for recipients.

Create Page Style

The screen allow you to create new Page Styles to be used to define new content layouts for your website (it's HTML framework essentially). "System" Page Styles can be easily manipulated with the built-in Style Designer without coding so they are recommended. If you are an HTML coder, you can also create your own "Custom" Page Styles from scratch so there are no limits to the layout of the site you can create. You can even mix these two Page Styles if you have complex website requirements or integration needs with third-party web services.

What type of Page Style do you want to create?

System Page Styles are based on popular web page layouts and are created for you. That is to say, the system will generate and store the HTML for all System Page Styles.

System Page Styles were designed so you don't have to know any HTML coding, and enjoy error-free HTML pages, We highly recommend that you use System Page Styles for your website pages.

System To create a System Page Style, simply pick the layout of the System Page style you wish to start with and Continue. The Style Designer will be launched and you can begin adding your content regions within the layout you selected. System Page Styles can then be edited at any time.

IMPORTANT: If you want to define a Page Style that will be used to display it's associated Page automatically whenever a mobile (phone) visitor is detected, you **MUST** select the "1 column, Mobile" Page Style Layout. All other Page Style Layouts will only be visible to Desktop (computers and tablets) site visitors.

Custom Page Styles allow you complete freedom to add your own HTML, creating your own unique content layouts. You can import any existing website design or a website template into Custom Page Styles. You will be required to add system tags to identify where you wish content and interactive features to be placed.

Custom To create a Custom Page Style, simply select Custom and Continue. The HTML editor will be launched and you can begin adding your HTML and adding your content tags. Custom Page Styles can be edited at any time.

NOTE: If you are an HTML coder, you can create Custom Page Styles that will also work with the Theme Designer. You will need to examine the HTML page source of a System Page Style within your browser to understand the tags you will need to include to make your own HTML Page Styles compatible.

TIP: We recommend that you create System Page Styles instead of Custom Page Styles. System Page styles allow you to move content regions around using the Style Designer without the need to worry about HTML coding. System Page Styles are fully compatible with themes created by the Theme Designer.

TIP: You would use more Page Styles if you are creating not only a public site, but a staff intranet site, a members-only portal site, or an extranet for your clients, each with their own menus and common content - and all within the same website!

Take care when modifying or deleting Page Styles, Theme files, and Designer Files. Making a mistake could cause your website to be unusable. There is no undo!

Style Designer

The Style Designer is used to create and edit System Page Styles, which are pre-built layouts that provide you with areas to drop your content and interactivity into. You don't actually add your text and photos here. Instead, you add placeholders for "regions" which will be replaced with your content and built-in apps when a Page is displayed that uses the Page Style.

Page Style Name

Enter the unique name for this Page Style.

Name: TIP: Create a naming system for your Page Styles so you can remember how many columns each Page Style has and add something descriptive to help you remember the important content regions that are unique to this Page Style.

Add or Remove Cells and Regions in the Page Layout below

Social Networking Position: Select the position around the Primary System Region ("Use Page") where you would like the Social Networking features to appear. You can also select "Disable" to hide the display of the Social Networking features for this Page Style.

NOTE: The Social Networking features are enabled and configured in the Site Settings.

Empty Cell Width: You can define the width of any empty cells in your Page Style, by setting the Empty Cell Width field value. You can use empty cells to create spacing between other cells. (You can leave this field blank if you want the width of empty cells to be the same as other cells in the same row which is the default.)

Each Page Style is associated with a single layout when it is created. Layouts are designed for common page structures for 1 column pages, or 2 column pages with a sidebar, mobile pages, and emailer pages, for example. You cannot change a Page Style's layout after it is created, but you can create an unlimited number of Page Styles, one for every single Page if you need too!

Page Style Areas

Within all Page Style layouts, there are certain areas that have been predefined and consistent across all System Page Styles. These areas, like Site Border, Site Header, Site Top, etc., are indicated with a solid line surrounding their area of influence. These "wrappers" give the Theme Designer the "hooks" it needs to attach graphical styling elements to these areas within all Page Styles so all Pages on the site can share common graphical elements using a single Theme.

Adding Content

To add content regions to your Page Style, simply add rows and columns to any of the predefined content areas within the layout. You do this just as you would if you were creating a table with cells in a document.

You'll notice that you can't change the rows height or the columns width. This is not necessary here. Only each region's location and relation to other regions around it is important to the Page Style. You see, the height will be determined by the amount of content you add, ever-expanding to contain whatever is placed within the regions. The width of each column, or area of the layout, is dictated by the number of cells in a row, and can be overridden by any Theme used to display the Page Style.

Mobile Page Styles are displayed with a lime-green border for easy identification. Mobile Page Styles are limited to one-column layouts since sidebars would be unusable when viewed from a mobile phone. The only difference between Mobile Page Styles and all other (desktop) Page Styles is the Site Border area has been replaced by the Mobile Border area. The Mobile Border is used by the Mobile Themes to "float" the Page content to the entire width of the device displaying it.

NOTE: You don't have to assign a content region in each area or cell. Empty areas and cells will contain nothing on the Pages that display them, however, but the space it occupies will still contain spacing and styling if defined in the Theme).

Regions

There are a number of types of "regions" you can assign to any cell in your Page Style layout. Each region replaces the cell with content when a Page is displayed that uses the Page Style. The following is a list of the regions available:

Page Regions

Page Regions are replaced with content (text and photos) you add through the Rich-text Editor. Even though you are creating and adding them on the Page Style, they are actually created for each Page when that Page is assigned to the Page Style. Page Regions are referenced in the order they are added to the Page Style, from top left to bottom right. So if you remove a Page Region from your Page Style, the remaining Page Regions will be renumbered. Since Page Regions are created within each Page, removing Page Regions from a Page Style does not delete the Page Region or its content, it only hides it from view. (If you delete a Page Region from a Page Style, you can add it back anywhere in any Page Style and your content will reappear!)

System Regions

Page Layout: System Regions are replaced with the interactive features (Login Pages, Custom Forms, Calendars, Form Views, Product Catalogs, Photo Galleries, Order Forms, etc.) from the Page being displayed itself, or another Page. If a Page name is specified in the System Region, then the interactive feature (Page Type) for that Page will be inserted into that location. Alternatively, if "Use Page" is specified, then the interactive feature for any Page itself will be inserted into the location. Each Page Style must include at least one "Use Page" System Region (even if its not used).

Pages with the following Page Types are allowed to be selected for a System Region:

- Calendar View
- Catalog
- Custom Form
- Express Order
- Folder View
- Form List View
- Form View Directory
- Order Form
- Photo Gallery
- Search Results
- Shopping Cart

Common Regions

Common Regions are replaced with content (text and photos) you add through the Rich-text Editor. Common Regions allow you to create content that can be shared across one or more Pages throughout your website. Common regions must be created first, and then can be added to any Page Style.

Designer Regions

Designer Regions are replaced with HTML content (javascript, etc). Designer Regions allow you to create and place code widgets that can be shared across one or more Pages throughout your website.

Designer Regions must be created first, and then can be added to any Page Style.

Dynamic Regions

Dynamic Regions are replaced with PHP code that will be executed by the web server. Dynamic Regions allow you to create and place PHP code that can be shared across one or more Pages throughout your website. Dynamic Regions must be created first, and then can be added to any Page Style. For security reasons, your Site Administrator must enable Dynamic Regions before they can be used.

Menu Regions

Menu Regions are replaced with the animated dropdown or accordion style menus you can add items to from the Edit Page screen. Menu Regions must be defined first before you can add them to your Page Styles. (See the IMPORTANT note below.)

Ad Regions

Ad Regions are replaced with the animated sliding or fading ads (text and/or photos) you can create from the Ads tab. Ad Regions must be defined first before you can add them to your Page Styles. Ad Regions are the only regions that must have a predefined width and height for it's animation to work. (See the IMPORTANT note below.)

IMPORTANT: Menu Regions and Ad Regions require an extra step after you add or even move them from cell to cell within your Page Style. Once you have added or moved a Menu Region or Ad Region within your Page Style and saved it, you need to navigate to a Page that uses your new Page Style. Then go into "Theme Preview" mode and edit your site's Theme within the Theme Designer and just resave the Theme. By resaving the Theme, the Theme Designer will generate the proper code to make the animation for your Menu Region or Ad Region work. If it is a new region, the animation may not still work, so you will need to reedit the Theme and find the fold that contains the new region and update it's dimensions until it works to your liking and save the Theme.

Chat Region

The Chat Region will be replaced by the online/offline chat buttons from the Site Settings and the built-in chat code to allow your site visitors to chat with your chat operators. This feature is a purchased upgrade. If you do not sign up for the a chat plan, the Chat Regions will display nothing and have no affect on your Page Styles. See the Who's Online feature for more information.

PDF Region ^{beta}

PDF Regions will be replaced with a PDF icon that will allow Visitors to view any Page as a PDF (e.g. to save or print). This is a beta feature that might not work for your site. This feature requires the wkhtmltopdf utility which your server administrator may install. Your server administrator may read the installation guide for more information.

Mobile Switch Regions

Mobile Switch regions are replaced with either a "Full Site" link or a "Mobile Site" link. These links are dynamic toggle the Visitor between Mobile Mode and Desktop Mode. So, for example, if the current Visitor or User is viewing the site in Mobile Mode and clicks the link, the Page will be redisplay in the new mode and vice versa. This allows your Users and Visitors to change their mode of display at any time regardless of the device detection features of the system. Keep in mind that each mode displays the Page with the associated Page Style and Theme defined for that mode.

Override the activated Theme

Select a Theme if you want this Page Style to always use a specific Theme instead of the Theme that is activated for the site. This feature is useful if you are building out an area of the site that has a different design than the rest of the site or if you are working on a new site design. You may leave this field unselected if you want this Page Style to use the activated Theme for the site.

Theme:

If you select a Theme for this field then the rich-text editor will load that Theme instead of the activated Theme, when editing a Page.

If you are previewing a Theme then that Theme will be used instead of this Page Style's Theme or the activated Theme for the site.

Add Additional Classes to the Body of this Page Style

Additional
Body
Classes:

Enter one or more CSS classes that will be included in the body tag (e.g. home dark large). You should separate multiple classes with a space, and you should not include a period before the class name. The layout and Page Style name classes will still be included in the body tag if you choose to add additional body classes. You can use this feature to add the same class to multiple Page Styles, so that you can affect all of them in a certain way.

View Source

Page Styles are nothing more than the simple HTML page structure that will contain your content and interactivity. Click 'View Source' to take a look under the hood and the HTML code that is generated. It includes CSS classes for the Theme Designer and coders alike to "hook" their own custom CSS into to manipulate and style just about everything displayed! You can also add your own code to the Page Style's HTML <head></head> tag.

NOTE: If you are a CSS coder, you will also see the CSS class names for the Page Style and it's areas and regions are listed for reference in case you want to make CSS changes within the Theme Designer. See the Theme Designer for more information.

Create/Edit Custom Page Style

This screen displays a Page Style and it's properties.

Page Styles are created and modified by your Web Designer because it requires HTML programming experience.

Page Style can include any valid HTML code, so you can include Flash, DHTML, Javascript, images, CSS Style Sheets, and any other typical HTML web page elements.

Page Styles can be created using any popular web authoring tool such as Dreamweaver, GoLive, Coda, Coffee Cup, or any other web authoring tool or text editor that you prefer.

Code Editor

The Code Editor colorizes your code and adds line numbers to make it easier to read and debug. The Code Editor may take a while to "read" through your code and colorize it. This process is particularly slow on Internet Explorer browsers. We recommend the Firefox browser for faster editing throughout the website. It is free to download, and works on most desktop computers.

Page Style Properties

	Page Style Name Name of this Page Style.
Name:	It will be displayed in the Page Style selection field when editing a Page's Properties or a Folder's Properties. For security reasons, it is only visible to Site Managers.
Social Networking Position:	Select the position around the Primary System Region ("Use Page") where you would like the Social Networking features to appear. You can also select "Disable" to hide the display of the Social Networking features for this Page Style. NOTE: The Social Networking features are enabled and configured in the Site Settings.
	HTML Page with embedded the system Tags
Add HTML Code & Tags:	Add a full and valid <HTML>page</HTML> here. NOTE: See below for an explanation of all the available Tags and how to use them.

Adding Tags to your HTML

One of the most powerful features of the system lies in the fact that you only have to add a handful of tags to your HTML page and you have done everything necessary to build an entire searchable website, complete with "my account" login privileges, membership management, e-commerce, custom forms, protected areas, calendars, photo galleries, blogs, forums, ticketing systems, and on, and on.

Here is a typical HTML page showing only the tags for clarity and not all tags are used:

```
<html>
  <head>
    <title></title>
    <meta_tags></meta_tags>
    <stylesheet></stylesheet>
  </head>
  <body>
```

```

<menu>main-menu</menu>
<cregion>site-banner</cregion>
<pregion></pregion>
<system></system>
<pregion></pregion>
<cregion>site-footer</cregion>
</body>
</html>

```

That is all it takes to create an entire, full-featured, database-driven website!

The Path Tag

The {path} tag can be inserted anywhere in your HTML and is replaced automatically with the absolute URL to the location where your system software was installed. You should always use the {path} tag if you need to reference any uploaded files within your HTML. This makes your links portable, so if you ever need to move the software system to another directory within your web server, your hand-coded links will still work.

Let's look at a typical example.

Say you want to link to a background image file (example.png) that you uploaded through the Design Files within the Control Panel. However, you want to be sure that the link is portable because your web server administrator originally installed the system software into a temporary directory that looked something like this:

`http://192.168.0.1/~example/software` and will need to move the system software to

`http://www.example.com/software` once you have setup your domain and are ready to launch the site.

So if you hard-code your link to example.png file like this:

`http://192.168.0.1/~example/software/files/example.png` or
`/files/example.png`

Then when the system software is moved later to another directory, this link would no longer work. So instead, be sure to link to the file using the {path} tag:

`{path}files/example.png`

The {path} tag is only necessary within your custom HTML such as Custom Page Styles, Editable Head Content in System Page Styles, Designer Regions, and within custom CSS files. The {path} tag is not necessary when adding links through the Rich-text Editor. These links will be converted automatically for you when the content region is saved.

NOTE: If you are the web server administrator and move the system to another directory off of your webroot after installation, be sure to update your .htaccess file per the system's installation / update instructions.

The System Tags

When you create a new Page Style, you'll notice that we already prefill your HTML Code with a valid HTML page to get you started. Here is a listing of all the system tags that you can embed within your Page Styles.

<head>

These tags must be placed between the <head></head> tags in your Page Style.

This tag will be replaced with the <meta> tags and the contents of the Page's Description and Keyword fields (or, if blank, the defaults in the Site Settings). These

are typically referred to as a "meta tags" and Search Engines use this information to help classify Pages.

<meta_tags></meta_tags>

NOTE: There should be no spaces or characters between the set of tags. You can only define this tag ONCE in each Page Style.

This tag will be replaced with a <stylesheet> statement and link to a style sheet file (CSS). This tag is ideal for Site Designers of seasonal shopping sites to easily change the entire website look and feel using a single CSS style sheet.

<stylesheet></stylesheet>

NOTE: There should be no spaces or characters between the set of tags. You can only define this tag ONCE in each Page Style.

IMPORTANT: You must include this tag if you are using Themes, they rely on this tag to be present in the Page Style to function.

This tag will be replaced with the content of the Page's Title field (or, if blank, the default Title in the Site Settings). It will display in the Visitor's browser window (title bar area). This is typically referred to as a "meta tag" and Search Engines use this information to help classify Pages.

<title></title>

NOTE: There should be no spaces or characters between the set of tags. You can only define this tag ONCE in each Page Style.

</head>

<body>

These tags must be placed between the <body></body> tags in your Page Style.

This tag will be replaced by the contents of any rotating Ads assigned to the Ad Region called *name*.

<ad>*name*</ad>

NOTE: There should only be the *name* and no spaces between the set of tags. You can define this tag as many times as necessary within each Page Style. The *name* must exist or this tag is ignored.

TIP: We recommend that each <ad> tag should be contained within a <div> tag that defines the Ad Region's absolute height and width to restrict Ad content from compromising Page layout.

<cart></cart>

This tag will be replaced with the number of items and the dollar subtotal of any active Shopping Cart present in the Visitor's current browser session. If there are no items in the Visitor's Shopping Cart, then nothing will be outputted. The number of items and subtotal will be linked to the last Shopping Cart or Express Order Page that the Visitor visited, if one exists.

This tag will be replaced with the shared contents of the Common Region or Designer Region called *name*.

<cregion>*name*</cregion>

Common Regions should be reserved for basic word processor content and can be edited from within any Page (that is assigned the Page Style) using the Rich-text Editor by a Site Manager.

Designer Regions should be reserved for HTML and code snippets and are can be edited from within any Page (that is assigned the Page Style) by a Site Designer.

NOTE: There should only be the *name* and no spaces between the set of tags. You can define this tag as many times as necessary within each Page Style. The *name* must exist or this tag is ignored.

This tag will be replaced by the contents of the shared Dynamic Region called *name*.

Dynamic Regions are reserved for PHP code, required integrating third-party applications and databases into your website.

Dynamic Regions can only be edited from within the [DESIGN] area by a Site Designer.

<dregion>*name*</dregion>

NOTE: There should only be the *name* and no spaces between the set of tags. You can define this tag as many times as necessary within each Page Style. The *name* must exist or this tag is ignored.

IMPORTANT: For security reasons, this feature is disabled and requires server authorization to enable. Please contact your Site Administrator for more information.

This tag, known as a PHP Region, will allow you to insert PHP code into the Page Style. You can define this tag as many times as necessary within each Page Style.

<?php code ?>

IMPORTANT: For security reasons, this feature is disabled and requires server authorization to enable. Please contact your Site Administrator for more information.

This tag will be replaced with the Login Region called *name*. Login Regions allow you to integrate the Login Page functionality into any Page. This is useful if you have a Membership site and want to provide quick access for your Members to login from your home page.

<login>*name*</login>

Login Regions can only be edited from within the [DESIGN] area by a Site Designer.

NOTE: There should only be the *name* and no spaces between the set of tags. You can define this tag as many times as necessary within each Page Style. The *name* must exist or this tag is ignored.

This tag will be replaced with the shared contents of the Menu called *name*.

Menus allow you to create single and multi-level, javascript-animated menus for your website areas as necessary.

<menu>*name*</menu>

Menus can be edited from within any Page (that is assigned the Page Style) by a Site Manager.

NOTE: There should only be the *name* and no spaces between the set of tags. You can define this tag as many times as necessary within each Page Style. The *name* must exist or this tag is ignored.

This tag will be replaced with "previous" and "next" arrows that allow the viewer to navigate between the Pages of your website. The navigation arrows correlate with the Menu Items for the Menu called *name*, and the sequence is based on the ordering of the Menu Items. This is useful if you want your site viewers to be able to navigate your website in a sequential fashion.

<menu_sequence>*name*</menu_sequence>

NOTE: If you have more than one Menu Item linking to the same Page, then only the first Menu Item that links to the Page will be in the sequence.

This tag will be replaced with a PDF icon that will allow Visitors to view any Page as a PDF (e.g. to save or print). This is a beta feature that might not work for your site. This feature requires the wkhtmltopdf utility which your server administrator may install. Your server administrator may read the installation guide for more information.

<pdf></pdf> beta

This tag will be replaced with the contents of the next Page Region found within the Page.

Page Regions are reserved for basic word processor content and can be edited from within any Page (that is assigned the Page Style) using the Rich-text Editor by any Content Manager with "edit" access to the Folder where the Page resides.

<pre></pre>

NOTE: There should be no spaces or characters between the set of tags. You can define this tag as many times as necessary within each Page Style.

IMPORTANT: Unlike all other regions, you do not create Page Regions manually. They are created automatically when a Page is created, and the number of Page Regions created is determined by the number of Page Region tags found in the Page's selected Page Style. If you change the Page's Page Style later, the number of Page Regions will grow if necessary, but never shrink. Page Regions are never deleted until the Page itself is deleted.

This tag will be replaced with the dynamic system content for the Page's interactive Page Type (like a Custom Form, Photo Gallery, Calendar View, Order Form, Cart, etc).

If a Page name is not specified in the System Region, then the interactive Page Type for the Page the viewer is currently viewing will be used. Alternatively, if you enter a Page Name in the System Region, then the interactive Page Type for that Page will be used instead. Pages with the following Page Types are allowed to be entered in the System Region:

<system>page name</system>

- Calendar View
- Catalog
- Custom Form
- Express Order
- Folder View
- Form List View
- Form View Directory
- Order Form
- Photo Gallery
- Search Results
- Shopping Cart

There is no limit to the number of System Regions you can have on a Page.

The properties of the Page Type can be edited from within the Page by any Content Manager with "edit" access to the Folder where the Page

resides.

TIP: It is a good idea to add this tag in all Page Styles since it is so important to the function of your interactivity and ignored if not necessary.

IMPORTANT: This tag is required within any Page Style in order to enable the Comments feature for it's Pages.

This tag will be replaced by a Tag Cloud. A Tag Cloud is a list of Common Keywords or "Tags" in your site. When a Tag is clicked then the user will be sent to the Search Results page that was entered between the <tcloud></tcloud> tags.

Web Browser Keywords for Pages will be included in Tag Clouds for Search Results Pages that do not search Products. Search Keywords for Products and Product Groups will be included in Tag Clouds for Search Results Pages that search Products.

<tcloud>*search results page*
name</tcloud>

NOTE: If a Search Results page name was not entered between the tags then the first Search Results page that is found will be used for the tag.

NOTE: Anytime a Page that has "Include in Site Search" enabled is modified then it's Web Browser Keywords, if any, will be added to the Tag Cloud.

NOTE: Anytime a Product or Product Group that is being searched by a Search Results page is modified then it's Search Keywords, if any, will be added to the Tag Cloud.

This tag will be replaced with the a drop-down list of languages for your Visitors to select. If selected, all Page views will be translated until the selection is changed back. The site will continue to function, no matter what language is selected.

<translation></translation>

IMPORTANT: This feature must also be enabled in the Site Settings, and the additional translation service that makes it possible to translate the Pages is also required.

NOTE: There should be no spaces or characters between the set of tags. You can only define this tag ONCE in each Page Style.

</body>

Previewing a Page Style

To preview a Page Style simply click on the "Preview" button. This will open up the Page Style Preview window and display a Page that is using the HTML code that is in the editor.

NOTE: The "Preview" button does not save the changes you have made to the Page Style. However, all changes will be retained in the editor until the "Cancel" button is clicked.

While previewing a Page Style you can use the "Page to Preview" pick list to change the Page you are previewing to any Page within your site. This is helpful when building micro-sites.

NOTE: While previewing a Page Style, if you click on a link that is on the Page that you are previewing then it will

take you out of the preview mode.

Fixing a Broken Login Page

Since even the system itself uses a Page Style to define the Login Page for Site Administrators and Designers, if you accidentally remove the `<system></system>` tag from the Login Page's Page Style, you will not be able to login to your website!

If this happens, you can use the login URL shortcut to login:

<http://www.mywebsite.com/login/index.php?u=username&p=password>

WE RECOMMEND YOU MAINTAIN A BOOKMARK USING YOUR OWN WEBSITE, USERNAME, AND PASSWORD.

Be sure the first thing you do once you have logging is add the `<system></system>` tag back into the Login Page's Page Style, so you and your other Users can use the Login Page again!

View Source

For Designers that want to look under the hood, this screen is helpful by displaying the underlying HTML page* that is created by the Style Designer*, and optionally append HTML code to the `<head></head>` tag.

Additional Head Content

Although the Source needs to remain unaltered for the system to work well, System Page Styles can be expanded with additional functionality by placing code in the `<head></head>` tag of the Page Style. This is ideal if you need to add third-party widgets, javascript functions and libraries, or including CSS files to override all or part of the active System Theme's CSS.

You can enter any valid HTML into the Additional Head Content area. Click 'Save & Preview' to update the Source and view your changes in the Source window. Click 'Save & Return' to add your head content and return to the System Page Style. Click 'Cancel' to abort your most recent 'Save' operation.

The `{path}` tag can be inserted anywhere in your HTML and is replaced automatically with the absolute URL to the location where your system software was installed. You should always use the `{path}` tag if you need to reference any uploaded files within your HTML. This makes your links portable, so if you ever need to move the software system to another directory within your web server, your hand-coded links will still work.

Let's look at a typical example.

Say you want to link to a CSS file (example.css) that you uploaded through the Design Files within the Control Panel. However, you want to be sure that the link is portable because your web server administrator originally installed the system software into a temporary directory that looked something like this:

`http://192.168.0.1/~example/software` and will need to move the system software to

`http://www.example.com/software` once you have setup your domain and are ready to launch the site.

So if you hard-code your link to example.png file like this:

`http://192.168.0.1/~example/software/files/example.css` or
`/files/example.css`

Then when the system software is moved later to another directory, this link would no longer work. So instead, be sure to link to the file using the `{path}` tag:

`{path}files/example.css`

The `{path}` tag is only necessary within your custom HTML such as Custom Page Styles, Editable Head Content in System Page Styles, Designer Regions, and within custom CSS files. The `{path}` tag is not necessary when adding links through the Rich-text Editor. These links will be converted automatically for you when the content region is saved.

NOTE: If you are the web server administrator and move the system to another directory off of your webroot after installation, be sure to update your .htaccess file per the system's installation / update instructions.

Source (read-only)

The Source is a read-only copy of the currently saved System Page Style. This HTML code has been designed to work specifically with the active Theme (CSS file generated by the Theme Designer) and to be as compact as possible, and render well on all popular browsers and web devices.

TIP: View Source makes it even easier to create special function Custom Page Styles within your website, even if

the rest of your site is using System Page Styles and the active Theme. Paste the entire Source into a new Custom Page Style, add your own additional HTML code to it, and create specialized pages within your site that still inherit their design from your active Theme!

TIP: The System Page Style Name and Page Style Layout is added to the <body></body> tag of all System Page Styles to provide more flexibility and control over styling. Couple this with the ability to add your own CSS advanced styling within the Theme Designer and you can code some highly custom designs using only System Page Styles and System Themes!

* It may be important to know that not all HTML code is displayed within View Source. Additional javascript snippets are included when a Page is rendered if any of the built-in features including Who's Online, Chat, Social Networking, or Google Analytics are enabled. These code snippets are completely invisible and will not alter content or design in any way. These code snippets are NOT included when Pages are e-mailed through the E-mail Campaign feature. See Site Settings for more information. In addition, the JQuery javascript library is also included if any animated Menu Regions or Ad Regions are found in the Page Style.

All Menus

Site Designers can create and place interactive Menus into Page Styles.

By using Menus, your Site Managers (and selected Content Managers) will be able to maintain the website navigation systems themselves, just like Page content, without the need to edit any of the underlying programming that make the Menus work.

You can create as many Menus as you wish, so you can use Menus to create site-wide Menus, portal area Menus, and even dynamic site maps.

Searching Menus

You can enter a search term in the box on this screen and search for any Menu by it's properties.

Creating Menus

Click "Create Menu" to create a Menu. You can add an effect to a menu in order to enable pop-up or accordion features without including complex JavaScript libraries. The effect will add sleek animation to the user interface for multi-level menus.

Once you have created the Menu, add a <menu> tag to one, some, or all of your Pages Styles to specify the location and scope of your Menu across your website's Pages. At that point, your Site Managers and some Content Managers will be able to edit the Menu and add items to it right from the Edit Page screen.

Editing Menus

Site Managers (and selected Content Managers) can simply click on "Edit" on the Menu when editing a Page in order to add/remove Menu items and link them to Pages or other websites. Menus are "safe" because Content Managers and Site Managers cannot modify or delete the underlying Menu Region and it's Properties, which could cause a problem when rendering a Page.

Create/Edit Menu

This screen displays the Menu properties:

Menu Name

Menu Name: The new menu's name.

Submenu Effect

Pop-up: This creates a pop-up effect for submenus. The submenus can "drop-down", "fly-out", and "fly-up", based on the pop-up properties that are selected below.

IMPORTANT: CSS styling is required for setting the styling and structure of the menu.

Accordion: This creates an accordion effect for submenus. This effect features sleek animation to expand menu items.

IMPORTANT: CSS styling is required for setting the styling and structure of the menu.

None: This will create a menu with no effects applied to it.

TIP: This is ideal for site maps.

Pop-up Properties

Select the direction of the first menu level.

First Expand
Menu:

For example: If you select "Bottom", then when the Visitor places their cursor over the top-level Menu item, any children Menu items will "fly-down" from the bottom of the top-level Menu item.
Select the direction of the second menu level.

Then Expand
Menu:

For example: If you select "Right", then when the Visitor places their cursor over the first-level Menu item, any second level children Menu items will "fly-out" from the right side of the first-level Menu item.

Planning your Pop-up Menus

If you want your website's pop-up menu to be horizontal, along the top of the Page, you would specify "Bottom", "Right".

If you want your website's pop-up menu to be vertical, along the left margin of the Page, you would specify "Right", "Right".

If you want your website's pop-up menu to be horizontal, along the bottom of the Page, you would select "Top", "Right".

Edit Menu

This screen displays all the Menu Items for this Menu.

Each Menu Item will be added to the Menu on all Pages that share this Menu.

If this is a multi-level Menu, then you can organize Menu Item together in parent/child relationships. You can create as many levels as you need, however, we recommend that you limit your levels to 3 or 4 for better usability.

To create a new Menu Item, click on "Create Menu Item".

NOTE: Content Managers who have edit access to specific Menu Regions and Site Managers can only edit the Menu Items for those Menus. Site Designers and Site Administrators can also edit the underlying Menu Region Properties.

If you are a Site Designer, you can also click "Edit Menu Properties" to edit the Menu properties themselves from this screen.

Create/Edit Menu Item

This screen displays the properties of this Menu Item.

Menu Item Name

Menu
Item
Name:

The name of the menu item that will appear as the label on the Menu that your website Visitors will either hover over or click into.

Link Menu Item To

Page:

The Page on your website that the Menu item will link too.

TIP: Be sure this is a Page in a Folder with the appropriate access for all Visitors that view the Menu. Any fully-qualified URL, like: <http://www.MyOtherWebsite.com>.

URL:

TIP: If you want to create a link to a downloadable File on your website, view the File and place the link to the File here, like: <http://www.MyWebsite.com/files/MyFile.pdf>. Be sure this is a File in a Folder with the appropriate access for all Visitors that view the Menu.

Target Window for Menu Item Link

This is where the system will launch the link to the Page or URL.

Link
Target:

Same Window means that the link will open in the Visitor's current browser window.

New Window means that the link will open in the Visitor's browser as a new window or tab.

Parent Menu Item

Parent
Menu
Item:

If this Menu Item is in a multi-level menu, then specify what other Menu Item will be it's parent.

NOTE: This value is ignored if this Menu Item is not in a multi-level Menu.

All Common Regions

Common Regions are shared content areas that you can create for your Site Managers to maintain directly from a Page using the Rich-text Editor.

Common Regions typically contain word processor type information like text, tables, photo, and event videos.

Common Regions are considered "safe", meaning your Site Managers and Content Managers can edit them, but cannot delete them from your Page Styles inadvertently.

Since Common Regions are placed into Page Styles, they become shared content that can be displayed on one, some, or all of your website Pages.

TIP: Common Regions are ideal for website headers and footers. They are also good for creating different departmental website area content shared only among Pages in a certain area.

Unlike Page Regions, Common Regions must be created manually by the Site Designer before they can be edited.

Once you have created the Common Region, add a <cregion> tag to one, some, or all of your Pages Styles to specify the location and scope of your Common Region across your website's Pages.

Create/Edit Common Region

This screen displays the Common Region properties:

Common Region Name:	Common Region Name This is the unique Common Region name. This is the name that will be inserted into any Page Style between the <cregion></cregion> tags. NOTE: If you change this Name, be sure to update the tag's name in the Page Styles.
Content:	Shared Content to appear on associated Pages This is the content that will be displayed in any Page that shares the same Page Style where this Common Region's tag is placed. This content can be edited directly from the Page using the Rich-text Editor by any Site Manager, Site Designer, Site Administrator, or any User who has edit access to a Common Region. NOTE: Only Site Designers can delete Common Regions. Also, for security reasons, you cannot add PHP code to Common Regions.

All Designer Regions

Designer Regions are shared content areas that you can create for only your Site Designers to maintain directly from a Page. These areas are better for widget coding, javascript, etc., where you don't want someone without HTML programming knowledge to accidentally edit it.

Designer Regions typically contain javascript, HTML widgets, embedded Flash objects, etc.

Since Designer Regions are placed into Page Styles, they become shared content that can be displayed on one, some, or all of your website Pages.

TIP: Designer Regions are ideal for adding news feeds and other third-party widgets to your website.

Unlike Page Regions, Designer Regions must be create manually by the Site Designer before they can be edited.

NOTE: Designer Regions are not editable using the Rich-text Editor because it strips out non-HTML/CSS tags in an attempt to "clean" the content before it is saved. It does this to help the Content Managers from adding bad tags to their Page content and breaking the Page's layout and functionality.

Searching Designer Regions

You can enter a search term in the box on this screen and search for any Designer Region by it's properties and content.

Widgets

There are a few built-in functions, called widgets that allow you to add advanced functionality to your HTML website design.

Contact Widget

The Contact Widget is a PHP script you can add to your website HTML that accepts contact information and creates a Contact in the database. The Contact Widget, when submitted, will create a Contact in a Contact Group, add the Contact fields that are collected, e-mail the Contact fields collected to any User with "Notify of Leads" selected, and then redirect the Submitter to any URL.

TIP: Contact Widgets are useful when you need to collect Contacts but you don't want to dedicate the whole Page for the purpose, like a site footer with a "join mailing list" area. If you need more control over collecting Contacts and using auto-responders, consider using the more powerful Custom Forms features.

To add the Contact Widget to your website, simply cut and paste the HTML below into any Designer Region or directly into a Page Style, be sure to replace the "/login/" directory with the directory you login with:

```
<form action="/login/contact.php" method="post" />
  <input name="return_url" type="hidden"
value="http://www.mydomain.com/pages/my_confirmation_page" />
  <input name="lead_source" type="hidden" value="Website Contact Widget" />
  <input name="group" type="hidden" value="Leads" />
  <input name="email_subject" type="hidden" value="Thank you for contacting
us." />
  <table>
    <tr>
      <td>First Name:</td>
      <td><input name="first_name" type="text" size="30"
```

```
maxlength="50" /></td>
</tr>
<tr>
    <td>Last Name:</td>
    <td><input name="last_name" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Nickname:</td>
    <td><input name="nickname" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Company:</td>
    <td><input name="company" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Title:</td>
    <td><input name="title" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Department:</td>
    <td><input name="department" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Office Location:</td>
    <td><input name="office_location" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Business Address 1:</td>
    <td><input name="business_address_1" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Business Address 2:</td>
    <td><input name="business_address_2" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Business City:</td>
    <td><input name="business_city" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Business State:</td>
    <td><input name="business_state" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Business Country:</td>
    <td><input name="business_country" type="text" size="30"
maxlength="50" /></td>
```

```
</tr>
<tr>
    <td>Business Zip Code:</td>
    <td><input name="business_zip_code" type="text" size="30"
maxlength="10" /></td>
</tr>
<tr>
    <td>Business Phone:</td>
    <td><input name="business_phone" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Business Fax:</td>
    <td><input name="business_fax" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Home Address 1:</td>
    <td><input name="home_address_1" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Home Address 2:</td>
    <td><input name="home_address_2" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Home City:</td>
    <td><input name="home_city" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Home State:</td>
    <td><input name="home_state" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Home Country:</td>
    <td><input name="home_country" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Home Zip Code:</td>
    <td><input name="home_zip_code" type="text" size="30"
maxlength="10" /></td>
</tr>
<tr>
    <td>Home Phone:</td>
    <td><input name="home_phone" type="text" size="30"
maxlength="50" /></td>
</tr>
<tr>
    <td>Home Fax:</td>
    <td><input name="home_fax" type="text" size="30"
maxlength="50" /></td>
</tr>
```

```

        <tr>
            <td>Mobile Phone:</td>
            <td><input name="mobile_phone" type="text" size="30"
maxlength="50" /></td>
        </tr>
        <tr>
            <td>E-mail Address:</td>
            <td><input name="email_address" type="text" size="30"
maxlength="100" /></td>
        </tr>
        <tr>
            <td>Website:</td>
            <td><input name="Website" type="text" size="30"
maxlength="255" /></td>
        </tr>
        <tr>
            <td>Opt-Out:</td>
            <td><input type="checkbox" name="opt_out" value="yes"
class="checkbox" /></td>
        </tr>
        <tr>
            <td>Description:</td>
            <td><textarea name="description" cols="30"
rows="5"></textarea></td>
        </tr>
    </table>
    <input type="submit" name="submit" value="Submit" />
</form>

```

All fields are optional except for "return_url". The "return_url" field defines where the Submitter will be directed after the Contact Widget is submitted.

Site Search Widget

Site Search Widget is a PHP script that you can embed in any Designer Region or Page Style that will allow your Visitors to search Pages for content and return the results on the Search Results Page. You can place the Site Search Widget anywhere on your site.

All "searchable" Pages will be searched by the Site Search Widget. If you don't want some Pages found, even if the Visitor or User has access to it's Folder, disable "Include in Search" in those Pages and they will not be found.

Site Search will only display the search results for Pages that the Visitor or User has "view" access to. So, website Visitor will only see search results from Pages that are in Public Folders, and Members will see both results from Public Folder Pages and Membership Folder Pages, and so on.

To add the Site Search Widget to your website, simply cut and paste the HTML below into any Designer Region or directly into a Page Style, be sure to replace the "/login/" directory with the directory you login with:

```

<form action="/login/search.php" style="margin: 0px">
<input type="text" name="query" class="search-query" /><input type="submit"
value="Search" class="search-submit" />
</form>

```

TIP: You may also point the form action to a Search Results Page. (ex. action="/pages/search_results")

NOTE: Site Search Widget only searches Page Regions and not Common Regions or Menus. This is necessary of

else the search results would return duplicate information for all Page that share content from Common Regions.

IMPORTANT: Be sure that all Pages that should be searched have "Include in Search" Page Property selected, and that you have a Search Results Page created that is in a Public Folder.

Embedded Media

Adding media objects to your Designer Region is easy. However, we have found some issues with their use on some client computers. If you are having problems rendering your embedded media that has been uploaded to your website, edit the media's Properties and use the actual URL

(e.g. `/[dir]/get_file.php?name=example.wmv`) instead of the virtual URL
(e.g. `/files/example.wmv`). We are not sure why the rewriting

of the URLs matters, but it appears that a small percentage of client computers don't like the virtual URLs, probably because of some unrelated compatibility issue that has not been indentified.

If that does not work, you should also consider adding a URL parameter to your media's Properties as follows, since there seems to be an issue for some versions of the Internet Explorer browser:

```
<object>...<param name="url" value="/files/example.wmv" />...</object>
```

Be sure to also replace the virtual URL with the actual URL as described above.

Create/Edit Designer Region

This screen displays the Designer Region Properties.

Designer Region Name

Name: This is the unique Designer (Common) Region name. This is the name that will be inserted into any Page Style between the `<cregion>` and `</cregion>` tags.

NOTE: If you change this Name, be sure to update the tag's name in the Page Styles.

Shared HTML Content to appear on associated Pages

Content: This is the content that will be displayed in any Page that shares the same Page Style where this Common Region's tag is placed. This content can be edited directly from the Page by any Site Designer.

NOTE: Only Site Designers can delete Designer Regions. Also, for security reasons, you cannot add PHP code to Designer Regions.

TIP: The Code Editor colorizes your code and adds line numbers to make it easier to read and debug. The Code Editor may take a while to "read" through your code and colorize it. This process is particularly slow on Internet Explorer browsers. We recommend the Firefox browser for faster editing throughout the website. It is free to download, and works on most desktop computers.

The Path Tag

The `{path}` tag can be inserted anywhere in your HTML and is replaced automatically with the absolute URL to the location where your system software was installed. You should always use the `{path}` tag if you need to reference any uploaded files within your HTML. This makes your links portable, so if you ever need to move the software system to another directory within your web server, your hand-coded links will still work.

Let's look at a typical example.

Say you want to link to a background image file (example.png) that you uploaded through the Design Files within the Control Panel. However, you want to be sure that the link is portable because your web server administrator originally installed the system software into a temporary directory that looked something like this:

`http://192.168.0.1/~example/software` and will need to move the system software to

`http://www.example.com/software` once you have setup your domain and are ready to launch the site.

So if you hard-code your link to example.png file like this:

```
http://192.168.0.1/~example/software/files/example.png or
/files/example.png
```

Then when the system software is moved later to another directory, this link would no longer work. So instead, be sure to link to the file using the `{path}` tag:

```
{path}files/example.png
```

The `{path}` tag is only necessary within your custom HTML such as Custom Page Styles, Editable Head Content in System Page Styles, Designer Regions, and within custom CSS files. The `{path}` tag is not necessary when adding links through the Rich-text Editor. These links will be converted automatically for you when the content region is saved.

NOTE: If you are the web server administrator and move the system to another directory off of your webroot after installation, be sure to update your .htaccess file per the system's installation / update instructions.

All Ad Regions

Ad Regions are shared content areas that you can create for your Site Managers and some Content Managers to maintain directly from a Page using the Rich-text Editor.

Ad Regions are ideal for rotating home page announcements, product tour slideshows, or traditional rotating graphical ad banners.

Ad Regions are "safe", meaning your Site Managers and some Content Managers cannot edit or delete them, but they can add edit, reorder, label, or delete the Ads that appear within the Ad Regions.

Since Ad Regions are placed into Page Styles, they become shared content that can be displayed on one, some, or all of your website Pages.

Like Common Regions, Ad Regions must be created manually by the Site Designer before Ads can be created for them.

Once you have created the Ad Region, add an <ad> tag to one, some, or all of your Pages Styles to specify the location and scope of your Ad Region across your website's Pages.

If a dynamic Ad Region contains more than one Ad, then previous & next buttons can appear which allow Visitors to browse through the Ads. Site Designers can enable/disable and position these buttons via the Theme Designer for System Themes or enable/disable, position, and style these buttons in the CSS for Custom Themes.

Searching Ad Regions

You can enter a search term in the box on this screen and search for any Ad Region by it's properties.

Create/Edit Ad Region

Ad Regions control the nature of ads within them. The dimensions of an Ad Region are defined, by the Site Designer, using CSS (Theme). However, Ad Region function is controlled by the Ad Region's properties. Using these properties, you can create "Static" Ad Regions that rotate ads randomly each time a page is loaded, or create "Dynamic" Ad Regions that will display each ad in succession without the need to reload the page.

Dynamic Ad Regions can also create interesting presentation-style areas within a page using the built-in transition effects.

Here are the Ad Region Properties:

Ad Region Name

Ad Region Name:

This is the unique Ad Region name. This is the name that will be inserted into any Page Style between the <ad></ad> tags.

NOTE: If you change this Name, be sure to update the tag's name in the Page Styles.

Ad Region Behavior

This determines the Ad Regions display behavior.

Static: Select this Display Type if you would like each Ad to change only when the Page is reloaded by the Visitor's browser. This Display Type is typically used for traditional advertising banner images.

Display Type:

Dynamic: Select this Display Type if you would like multiple Ads to be displayed each time the Page is reloaded by the Visitor's browser. This Display Type is typically used for slideshow-style banners and to animate information panels.

NOTE: Only Site Designers and Administrators can create, delete and rename Ad Regions. Site Managers and Users who have access to an Ad Region can edit it's properties.

Transition Type: This determines the type of animation that is used for the Ad Region.

Transition Duration: This determines how long the transition will take to complete.

Enable Autoplay: This will enable/disable the Autoplay feature. When the Autoplay feature is enabled, the animation will start automatically. This feature is similar to an automatic slideshow.

Interval: This is how long the Ad Region will wait before switching to the next Ad.

Play Continuously: Check this if you do not want the animation to stop. In other words, once the last Ad is reached, then it will loop back around to the first Ad and continue the animation. If you uncheck this, then when the last Ad is reached, it will loop back around to the first Ad and stop the animation.

All Dynamic Regions

Dynamic Regions are shared programming code areas that you can create for only your Site Designers to maintain directly from a Page.

For security and reliability reasons, only Dynamic Regions are allowed to contain PHP code.

Since Dynamic Regions are placed into Page Styles, they become shared content that can be displayed on one, some, or all of your website Pages.

TIP: Dynamic Regions are ideal for integrating your website with other applications or databases.

Unlike Page Regions, Dynamic Regions must be create manually by a Site Designer before they can be edited.

Searching Dynamic Regions

You can enter a search term in the box on this screen and search for any Dynamic Region by it's properties and content.

Create/Edit Dynamic Region

This screen displays the Dynamic Region Properties:

Dynamic Region Name

Dynamic
Region
Name:

This is the unique Dynamic Region name. This is the name that will be inserted into any Page Style between the <dregion></dregion> tags.

NOTE: If you change this Name, be sure to update the tag's name in the Page Styles.

PHP Code to appear on associated Pages

PHP Code
Snippet:

This is the HTML and PHP code that will be passed to the web server's PHP processor and interpreted. This content that will be displayed in any Page that shares the same Page Style where this Dynamic Region's tag is placed. This content can only be edited by a Site Designer.

NOTE: Only Site Designers can delete Dynamic Regions.

NOTE: The opening <?php tag and closing ?> tag should not be included in the code.

DISCLAIMER: Dynamic Regions create enormous security and stability issues for your website. We are is not responsible in any way for the results of any code that is executed within your web space. Be extremely careful with this feature, you accidentally destroy your website database, software, files, and configuration!!!

All Login Regions

Login Regions allow you to integrate the Login Page functionality into any Page.

Since Login Regions are placed into Page Styles, they become shared content that can be displayed on one, some, or all of your website Pages.

TIP: Login Regions are ideal if you have a Membership site and want to provide quick access for your Members to login from your home page.

Login Regions must be create manually by the Site Designer.

Searching Login Regions

You can enter a search term in the box on this screen and search for any Login Region by it's properties and content.

Create/Edit Login Region

This screen displays the Login Region Properties:

Login Region Name	
Login Region Name:	This is the unique Login Region name. This is the name that will be inserted into any Page Style between the <login></login> tags.
	NOTE: If you change this Name, be sure to update the tag's name in the Page Styles.
Header content to display when User is not logged in	
Not Logged In Header:	Enter the content you want to display above the login fields that the system will display in the Login Region when the User has not logged in yet.
	Check this field if you want to show the login form between the header and footer when the Visitor is not logged in.
Show Login Form:	TIP: If you are placing the Login Region in a small area, then you might want to hide the login form and add a link to a login Page in the header.
Footer content to display when User is not logged in	
Not Logged In Footer:	Enter the content you want to display below the login fields that the system will display in the Login Region when the User has not logged in yet.
Header content to display when User is logged in	
Logged In Header:	Enter the content you want to display above the login fields that the system will display in the Login Region when the User is logged in.
	Footer content to display when User is logged in
Logged In Footer:	Enter the content you want to display below the login fields that the system will display in the Login Region when the User is logged in.

NOTE: The above content areas that will be displayed in any Page that shares the same Page Style where this Login Region's tag is placed.

All Themes

This screen displays all the Cascaded Style Sheet (CSS) files that you can use to define the look and feel of your entire website. Themes allow your Site Designers to maintain control of the consistency of the design and content of the website.

System Themes

A System Theme is a Theme that was created using the Theme Designer. They are created to work with the System Page Styles generated by the Style Designer.

In order to edit a System Theme, click on the System Theme you want to edit, and then click on the "Edit Theme" button. This will open the Theme you are viewing in the Theme Designer.

To export a System Theme click on the System Theme you want to edit, and then click on the "Export" button. You will then be prompted to download the Theme CSV file.

If you need to backup, or transport a Theme to a different site, then when you export the Theme you will also need to download all of the Design Files that are associated with the Theme.

Custom Themes

You can also upload your own CSS files and add them to the head tag area of your HTML and bypass the Theme Designer/Style Designer features completely for ultimate flexibility. We encourage you to start with the System Page Styles and System Themes because they can be manipulated to create almost any site design and layout you can dream up.

To include your own Custom Theme, you can upload it as a Theme / Design File (make sure it has the .css file extension) and add the <stylesheet></stylesheet> tag to either a System Page Style (View Source Button), or to a Custom Page Style's <head> tag.

Searching Themes

You can enter a search term in the box on this screen and search for any Theme by it's properties.

Creating Themes

To create a new Theme, click on "Create Theme".

Activated Themes

Two Themes can be "active" at any one time on the website. One for desktop (computers and tablets) visitors and one for mobile (phone) visitors. The system will automatically detect and switch Themes based on the device that accesses any web page on the site. We recommend that your Site Designer add a Mobile Switch Region to all Page Styles so any site visitors can choose which Theme they wish to view regardless of the outcome of the automatic detection.

You can override the activated Theme for a specific Page, by editing the appropriate System Page Style and selecting a Theme.

Create Theme

Create a CSS Theme file to design and style the look of your HTML pages.

What type of Theme do you want to create?

System

Selecting this option will allow you to either use the Theme Designer to create your new System Theme or Import a System Theme from a CSV file.

Selecting this option will allow you to upload your own CSS file to be used for your new Custom Theme. This method requires that you have a knowledge of CSS and HTML.

Custom

NOTE: You can use Custom Themes with System Page Styles, you just need to look at the source of the System Page Styles created by the Style Designer and have a good knowledge of CSS and HTML.

This is the method in which you will create your new System Theme.

"Create a new System Theme with the Theme Designer" will allow you to use the Theme Designer to create your new Theme.

How would you like to create the System Theme?:

"Import a System Theme." will allow you to import a System Theme CSV file. You can get a System Theme CSV file by first exporting a System Theme from the system. After importing a System Theme, you use the Theme Designer to modify the Theme.

NOTE: When importing a Theme CSV file, if the CSV file name matches the name of an existing Theme CSS file, then a confirmation will appear that will allow you to overwrite the existing Theme.

New Theme File Name

Name:

This will be the name of your new Theme, and the name must contain ".CSS" to be valid.

Select New/Replacement System Theme CSV File to Import

Local CSV File:

Choose the .csv file to upload. This can be done by either typing in the directory path or by clicking "browse" and then browsing to the desired file location on your local computer. A CSV file can be generated by exporting a System Theme from a different website.

Select New/Replacement CSS File to Upload

Local CSS File:

Choose the .css stylesheet file to upload. This can be done by either typing in the directory path or by clicking "browse" and then browsing to the desired file location on your local computer.

Theme File Access Control

This is the Folder that the file will be placed in. The Folder's access control will dictate who can view or download the File.

Folder:

IMPORTANT: Be sure you select a Public Folder if you want all site Visitors to be able to see the website using this Theme.

Theme File Description

File Description:

Enter a description for this File that can be viewed by any Site Designer.

Edit Theme

Edit the CSS File to the web server. Themes are CSS files that are created by the Theme Designer (System Themes) or by uploading a CSS file into the system (Custom Themes). Here are the properties:

Theme File Name

You can change the name of this Theme file on the web server.

Name:

WARNING: Be sure that the filename extension is .css or else the Theme will no work correctly.

Theme File Access Control

This is the Folder that the Theme file will be placed in. The Folder's access control will dictate who can view the Theme.

Folder:

IMPORTANT: Be sure you select a Public Folder if you want all site Visitors to be able to see the website using this Theme.

Theme File Description

Description: Enter a description for this file that can be viewed by any Site Designer.

Activate Theme to Make it Live

When a Theme is active, it is inserted automatically into every System Page Style (and every Custom Page Style that has the <stylesheet></stylesheet> tag defined within it). Themes allow you can instantly change the look and feel of you entire website with a click of a button by activating a Theme from this screen.

WARNING: If you activate a Theme that doesn't work with your HTML Page Styles correctly, you could render your website unreadable. If this happens, activate another Theme until you can fix the problematic Theme.

Activate for Desktop: Check this box if you wish to set this Theme as the active Theme viewed by all desktop (computer / tablet) visitors.

Activate for Mobile: Check this box if you wish to set this Theme as the active Theme viewed by all mobile (phone) visitors.

Previewing Themes

You can apply any Theme to you website without activating it first. This means that you can browse your actual public website Pages through the new Theme, without any other website Visitor being affected. All other Visitors will see the active Theme. This "Theme Preview Mode" is enabled until you close your browser (end your session), or activate a Theme.

Deleting Themes

To delete a Theme from the web server, click on the Theme you wish to delete and click "Delete".

WARNING: Take care when deleting Theme files, there is no undo. Don't delete an active Theme or you will render your website unreadable (if you are using Themes in your Page Styles. If this happens, activate another Theme.

TIP: Use Theme Preview Mode (found through the [Pages] tab) to help you develop and test new Themes without affecting your "live" website.

Custom Format Feature

To further control the consistency of the content added by Content Managers, we have created a number of Custom Formats that are made available to your Content Managers when editing content using the Rich-text Editor's "Format" selections.

If are using the built-in stylesheet-driven website themes, then you have access to a series of styling for different types of content we have created for you. Each style becomes a Custom Format that you can apply them to your content. (However, you can still override any Custom Formats by adding your own CSS to the Advanced Styling area through the Theme Designer).

So that your content would be portable from one Theme to another, we devised a system based on a two-tone color scheme. In a two-tone color scheme, there is a "primary" and "secondary" color. We have taken that concept to develop primary and secondary buttons, boxes, links, and other common website styles. This allows you to extend this concept to your own website designs and style guides so that all content will work across all themes!

TIP: You should use these custom formats instead of "Fonts", "Font Styles", and "Font Sizes" which are disabled by default and are not compatible with the system themes and web content standards.

NOTE: We have included several custom formats within the system provided themes to help you add more pazazz to your content. We have also added a Tag Picker to help you more easily "grab" content to style.

Adding Custom Formats to Custom Themes

If you uploaded your own CSS Theme, then you can add Custom Formats to the Rich-text Editor by adding the `<custom_formats></custom_formats>` tags within CSS comments in your Custom Theme files, like this:

```
/* <custom_formats> */  
  
define your CSS custom formats here...  
  
/* </custom_formats> */
```

NOTE: Be sure that the `<custom_format>` and `</custom_format>` comments are spelled correctly and appear around the styles you want to make available to the Rich-text Editor or they will be ignored. (For an example, look at the CSS generated with every System Theme.)

TIP: Once you have defined all necessary Custom Formats in your Theme, we recommend that you disable the Rich-text Editor menu buttons from the Site Settings to prevent your Content Managers from using fonts, colors, and styling that is inconsistent with the website's intended design.

Edit CSS

This screen allows you to edit your own CSS files directly on the server, and replaces the tedious task of downloading, making changes, and re-uploading design files again and again during the site design process. It is also a great way to make quick edits to your Custom Theme and previewing the results before activating your newly modified Theme.

NOTE: You cannot edit a System Theme's CSS file directly so the system will only let you edit the CSS file if it is not a System Theme.

Code Editor

The Code Editor colorizes your code and adds line numbers to make it easier to read and debug. The Code Editor may take a while to "read" through your code and colorize it. This process is particularly slow on Internet Explorer browsers. We recommend the Firefox browser for faster editing throughout the website. It is free to download, and works on most desktop computers.

Saving Your Changes

There are two ways to save your changes when editing. "Save" will save your edits into the same CSS file that you are editing, as you would expect.

"Save A New Copy" will save your edits into a new CSS file, thus preserving your original CSS file unaltered. After the new file is created, you will be editing the new copy. You can use this method to create new versions of your CSS file so that you can back up to any version that you desire.

Previewing Your Changes

"Preview" allows you to preview your CSS edits in the Preview Theme Window. While previewing your CSS, you can use the "Page to Preview" pick list to change the Page you are previewing to any page within your site.

NOTE: While previewing a Theme's CSS, if you click on a link that is on the Page that you are previewing then it will take you out of the preview mode. Also, Preview will launch a new window, so you need to make sure your browser is configured to allow for Pop Up Windows from your website. With some browser versions, the CSS changes do not seem to show up. If that happens, your browser is simply using a previous version of the CSS file it has in memory, so you will need to clear the browser's cache (press Ctrl-F5 in Windows, or Command-R on the Mac).

IMPORTANT: Using "Preview" does not save the changes you have made to the CSS file, so be sure to "Save" your changes before leaving the Code Editor. If you don't wish to save your changes, you can always "Cancel".

Theme Designer

The Theme Designer allows you to style all elements and content areas created by the Style Designer. The Theme Designer contains thousands of options, and creates a single CSS file. It's impossible to fully document every field, and you'll learn the most by selecting different options and seeing how it affects your designs.

The Theme Designer has two panes. The one to the left holds all the current CSS settings and you can drill in and out of the folds to make changes to the Theme. Each fold represents areas and regions from within the Style Designer and the Page Style represented in the Preview pane to the right. The Pane to the right is the Preview Pane and displays any Page from your site that uses a System Page Style.

IMPORTANT: There is no UNDO once you 'Save' your Theme, so **we recommend that you 'Save New Copy' to hold on to the original before you start playing around with your Themes.**

Theme Name

If the Theme name displays [ACTIVE] next to it, then you are editing the "live" Theme that is currently being used to style all Pages using this Page Style to your current site visitors. We recommend that you edit a copy of the active Theme instead of editing the active Theme itself.

View Source

If you are a coder, or just interested in looking at the CSS generated by the Theme Designer, you can click 'View Source' and see exactly what code the Theme Designer is using to display the Page in the Preview Pane at the moment.

Preview Page

The 'Preview Page' displays the current Page being displayed in the Preview Pane. When you press 'Update Preview Pane', the current CSS settings from the left pane are used to style the Page in the right pane. Your Theme is not saved at this point. The pane to the left holds all the current Theme style settings within "folds", making it easy to drill up and down within the folds to make changes to the Theme you are editing. Nothing is saved until you press 'Save' or 'Save New Copy'.

If you want to preview another Page, you will need to save your Theme (if you want to keep any changes) and navigate to another Page you wish to preview and enter the Theme Designer again from that Page's Theme Preview Mode. Remember, Themes style Page Styles, NOT Pages.

Page Style

The 'Page Style' displays the current Page Style being styled to display the Page in the Preview Pane. If you want to preview another Page Style, you will need to save your Theme (if you want to keep any changes) and navigate to another Page that uses the Page Style you wish to preview and enter the Theme Designer again from that Page's Theme Preview Mode.

NOTE: If you are a CSS coder, you will also see the CSS class names for the Page Style are listed for reference in case you want to make CSS changes that affect the Page Style or similar Page Styles.

Folds

'Folds' refer to the accordion menus found in the left pane of the Theme Designer. Folds can contain folds, and styling changes in the parent folds will be inherited by children folds. For this reason, we recommend that you start with the Site Wide Settings and preview your changes as you go to understand how your changes affect the styling created by the Theme. So for example, if you set the font size in the Site Wide fold, there is no need to set the font size in any other fold, unless you want to override the font size for that specific fold. Less is always more when it comes to editing Themes.

The top most folds are always present in the Theme Designer (Site Wide, Site Border or Mobile Border, Site Top, Site Header, etc.). These fold correspond to the areas within the Style Designer. The Style Designer sets up the layout and the content, and the Theme Designer styles it.

TIP: You can see what area the fold options affect by hovering your mouse over the fold to highlight the area of the Preview Page that is affected by the fold's options.

Site Wide

This is the most important fold. It contains the most dramatic styling changes that you will most likely want to change first. Peek inside the 'General' fold within this fold. It is the fold where you can set your Primary and Secondary Colors that will affect all of your Custom Formats. If you are a CSS coder, you will access this fold the most if you are adding your own CSS styling.

Pre Styling

Click on the 'CSS

Primary & Secondary Colors

The most important aspect of the Theme Designer is the concept of Primary and Secondary colors. This concept is similar to a school's colors, the 2-tone paint job on a car, or the colors that make up your organization's logo or brand. By giving you access to set these within your Theme at a top level, all styling (like buttons, etc.) can be created automatically, based on these colors, maintaining design consistency across the entire website. You can set your Primary and Secondary colors in the Site Wide > General fold.

Based on the Primary and Secondary Colors and font styles, the Theme Designer will automatically output a few dozen content formatting selections that are available within the Rich-text Editor for your Content Managers to use to style their content. We call these "Custom Formats" and you can also tweak or completely override these style definitions with your own CSS using the Advanced Styling area.

Advanced Styling

If you know HTML / CSS, you can override any styling that is created by the Theme Designer by adding the appropriate CSS elements and inheritance to the Advanced Styling. To access Advanced Styling, under the top fold Site Wide > General, click on the "CSS" logo.

Site Border

The Site Border defines the area outside all your content areas out to the edges of the desktop browser screen that is displaying the Page. For most websites, you typically want this to be centered and a fixed width. However, setting it to "100%" will float all the content from screen edge to screen edge when displaying the Page. The Site Border is present in Desktop Mode and replaced by the Mobile Border whenever the Page is viewed in Mobile Mode. This allows you to define a Desktop width for Pages and a Mobile width for your Pages, all within the same Theme, if desired.

Mobile Border

The Mobile Border defines the area outside all your content areas out to the edges of the mobile browser screen that is displaying the Page. For most websites, you typically want this to be "100%" so your page content will float from screen edge to screen edge and fill up the small mobile phone screen when displaying the Page. The Mobile Border is present in Mobile Mode and replaced by the Site Border whenever the Page is viewed in Desktop Mode. This allows you to define a Desktop width for Pages and a Mobile width for your Pages, all within the same Theme, if desired.

Other Folds

The remaining children folds will be "pulled into" the Theme Designer by the Page Style itself. For example, you might have placed a Common Region into a specific row and column in the Page Style using the Style Designer, so a fold for that row and column will be displayed in the Theme Designer along with a label (which will be the Common Region's name for identification purposes). Now, understand that you are not actually styling the Common Region itself, by it's location within the Page Style (e.g. row and column). So, for example, if you move the Common Region to another location within it's Page Style, any Theme styling you may have added will NOT follow it.

TIP: You should start with the top level folds and make changes there first and let them cascade down into lower folds since folds are designed to inherit from parent folds. Keep in mind, you are styling the System Page Style specified in the left pane and it's content regions, not the actual Page being previewed.

Saving Themes

Themes are not saved back to the web server until you either select 'Save' or 'Save New Copy'. If you don't want to keep your changes, you can click 'Cancel' and your Theme will remain unchanged.

Save

This will save your changes to the theme file back onto the server.

Save New Copy

We recommend that you start with Site Wide Settings and Preview your changes as you go to understand how your changes affect the styling of your Pages.

Cancel

This will not save any of your changes and exit the Theme Designer.

Adding your own CSS

If you need to override any Custom Formats, or add other CSS that is not available within any of the folds, you can add it easily to the Pre Styling Area (CSS to run before the theme's own CSS) and to the Advanced Styling area (CSS to override the theme's CSS). For the most part, you will typically add your CSS to the Advanced Styling area.

You'll notice that the Page Style has a few CSS classes displayed beneath the Page Style's name (e.g. `.one_column`), and each fold has an equivalent CSS ID value (e.g. `#site_header`), and each content row and column has it's own CSS class (e.g. `.r1c1`). These values can be used in conjunction to add any CSS to your Themes. For example, if you want to style the first row and column in the Site Header or all One Column Page Styles using CSS, you would add this to the Advanced Styling area:

```
.one_column #site_header .r1c1 {css code here}
```

We recommend you open a code viewer like Firebug plug-in for the Firefox browser and make changes to the Preview Page's CSS using Firebug. When satisfied with the style changes, find the corresponding fold on the left pane to make your changes, and then click 'Update Preview' to verify your changes. Repeating this process you will quickly learn how to style your own Themes.

NOTE: The Theme Designer allows you to create rounded corners and shadowing without images, but this is a CSS3 feature that works with Mozilla (Firefox) browsers, Chrome, Safari, Mobile Safari, Android, and IE9. Before IE9, these features will be ignored but you can still use them.

NOTE: The Theme Designer can only preview Pages that use System Page Styles. If you attempt to launch the

Theme Designer and preview a Page that uses a Custom Page Style, the Theme Designer will instead preview the first Page it finds in the database that uses a System Page Style.

WARNING: The Theme Designer runs in the memory of your browser, so do not open the Theme Designer in two browser tabs (or windows) at the same time or the system can get confused and save one Theme over the top of the other one! You can open it in two different browsers, but be careful to only save the theme in one of the browsers.

WARNING: There is no UNDO once you 'Save' your Theme, so **we recommend that you 'Save New Copy' to hold on to the original before you start playing around with your Themes.**

All Design Files

This screen displays all the Design Files that have been uploaded into the system. Design files are typically image files, javascript files, flash files, site banners, or any other file that you might need to use in your site design.

Design Files are stored in the same Folders as other Files, but they are not accessible to Content Managers so they don't clutter File selection in the Rich-text Editor, and cannot be modified or deleted by Content Managers or Site Managers accidentally.

Design Files share the same access control of the Folder they are placed into.

Viewing & Editing Design Files

You can view and edit any File you have access to by selecting the File from any of the All Design Files screen.

Modifying Design Files

You can modify the Folder and design property for one or more Design Files by selecting the Design Files you wish to modify and clicking "Modify Selected".

WARNING: Since changing a Design File's Folder affects its access control, you can accidentally make a Private Design File accessible or a Public Design File inaccessible to others attempting to view the Design File. Keep this in mind when moving Design Files among Folders.

Searching Design Files

You can enter a search term in the box on this screen and search for any Design File by it's properties.

Creating Design Files

To create a File, click on "Upload Design Files".

Deleting Design Files

To delete a File from the web server, select the File you wish to delete and click "Delete Selected".

NOTE: If you delete a File, any links or references to the File will need to be updated.

WARNING: Take care when deleting Design Files, there is no undo. If you are using the Theme feature, and the Design File you delete is referenced by the currently active Theme, then your website may not be displayed correctly.

Adding a Favicon

A favicon is the name for the tiny graphical image that appears within the address bar of your web browser when viewing some websites. Favicons are typically a tiny version of your logo and help visitors to identify that they are viewing your website and can help to increase your brand. You can prepare a favicon by creating a square image and saving it as a .png or .gif file. Then visit one of the many free favicon generator websites which will create a special favicon.ico file from your image. Then simply upload the favicon.ico file as a Design File (be sure it is placed in a Public Folder) and the system will automatically use it as the favicon for your website.

NOTE: Files that have been archived are italicized.

Upload Design Files

Upload a Design File to the web server from your local computer.

Select New/Replacement Design File to Upload

Local File:

Choose the Design File to upload. This can be done by either typing in the directory path or by clicking "browse" and then browsing to the desired Design File location on your local computer.

Design File Access Control

This is the Folder that the Design File will be placed in. The Folder's access control will dictate who can view or download the Design File.

Folder:

IMPORTANT: Be sure you select a Public Folder if you want all site Visitors to be able to see this Design File.

Design File Description

File Description: Enter a description for this Design File.

Clicking "Upload" to send the Design File from your local computer up to the web server. Please be patient, large Design Files may take a few minutes.

NOTE: There is no maximum file size that can be uploaded, however, success will depend on your own Internet connection speed at the time of the upload, and any file size limitation that your hosting provider sets on your hosting account. If you receive an error, we recommend trying the upload at a less busy time of day or trying the upload with a smaller file.

Edit Design File

Edit a Design File to the web server. Here are the Design File Properties:

Design File Name

You can change the name of the Design File on the web server.

File Name:

WARNING: If you change the Design File's name, any links or references to the Design File will need to be updated, so take great care in renaming Design Files.

Design File Access Control

Folder:

This is the Folder that the Design File will be placed in. The Folder's access control will dictate who can view or download the Design File.

Check if File is a Design File that is Managed by Site Designers

Design:

You can use this property to set whether this File is a Design File or not. Design Files may only be edited or deleted by Site Designers in order to prevent the design of a website from being accidentally altered.

Design File Description

File Description: Enter a description for this Design File.

Edit JavaScript

This screen allows you to edit your JavaScript files directly on the server, so you don't have to download them, make your changes, and re-upload them again during site design. This is a great way to make quick edits to your website's JavaScript files.

Code Editor

The Code Editor colorizes your code and adds line numbers to make it easier to read and debug. The Code Editor may take a while to "read" through your code and colorize it. This process is particularly slow on Internet Explorer browsers. We recommend the Firefox browser for faster editing throughout the website. It is free to download, and works on most desktop computers.

Saving Your Changes

There are two ways to save your changes when editing. "Save" will save your edits into the same JavaScript file that you are editing, as you would expect.

"Save A New Copy" will save your edits into a new JavaScript file, thus preserving your original JavaScript file unaltered. After the new file is created, you will be editing the new copy. You can use this method to create new versions of your JavaScript file so that you can back up to any version that you desire.

NOTE: When you load your site to test your updates you will need to make sure to press CTRL-F5 (Command-R on Mac) to tell your browser to re-download the JavaScript file.