SiteApex®

Getting started Guide

Update October 2023

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Welcome To Your New Website!

Congratulations on your new website!
This document is intended to get you up and running with your new website.

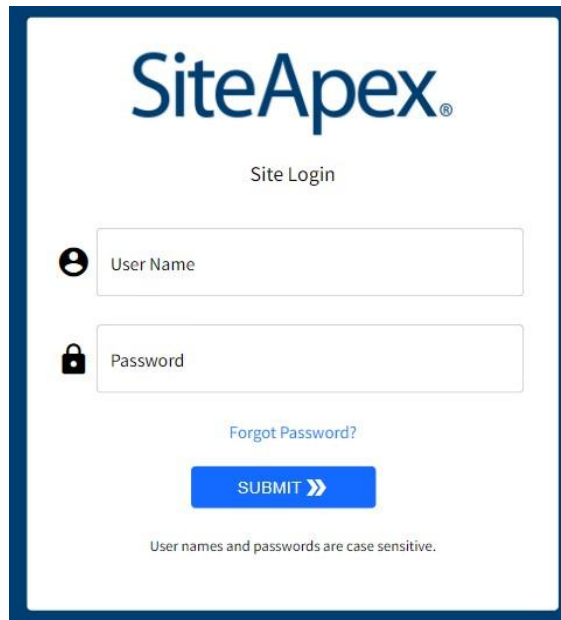## Additional Help & Guidance is Available!
- For additional information please visit our online knowledgebase at:
  http://support.siteapex.com
- When you are working within the administration area of your website, look for the help
  icon ❓ . You can learn about features right in the Admin area by clicking on the icon.
- If you need technical support, please visit https://myhelpportal.com

Logging in and Getting Familiar with the Admin Areas

Logging In to Your Admin Area
In your web browser of choice. Visit **https://yourdomain.com/admin** and enter your username
and password. Speak to your SiteApex provider if you did not receive a login.

Replace yourDomain.com with your actual domain name. Example: if your site was hosted on
coolnewwebsite.com you would go to coolnewwebsite.com/admin to log in.

The SiteApex Administration Interface & Menu

Once logged in, you will immediately be presented with the system menu on the left and your website's Site Map on the right.

Note, in the top right corner of the Admin there are links to view your website, link to the Support website and links to manage your profile and logout.

Main Menu

On your left side, the default **Home** menu area has a link to the **Site Map** and lists shortcuts to any **Modules** that the system detects are being used on your website.

The rest of the menu navigates to **Modules**, the **Control Panel**, **Results** and **Help**. Additionally if you have the *Shopping Cart installed this will have a dedicated menu button.*

Hover over the menu icons to view its subcategories.
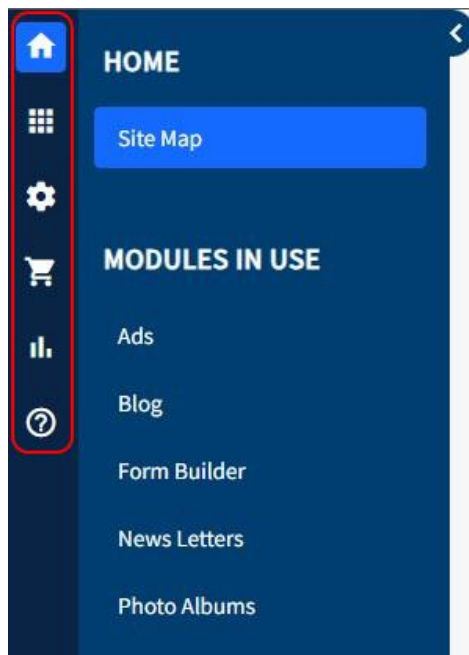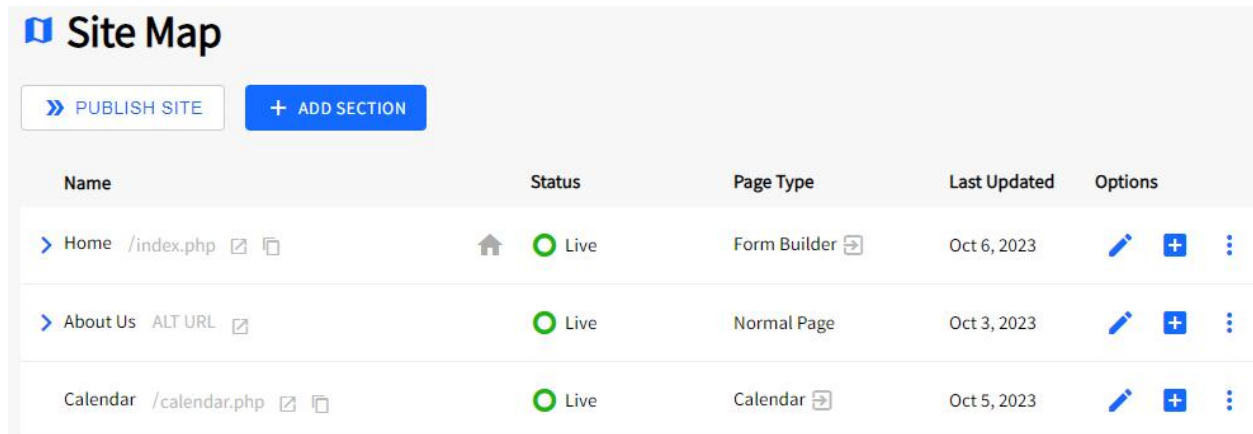
Tip! You can hide the menu by clicking on the arrow in the top right corner of the menu and it will act as a flyout menu instead. Handy for viewing on a laptop or smaller screen device.

Site Map

On the right side, the Site Map displays your web pages, where you Add, Edit, and Delete pages on your site. We'll come back to the Site Map later.

Note to the right of all Sections, Categories and Page, you can view the status of a page, page type if it contains a module, the last time it was updated and more page options (explained in the Site Map area below).

Modules

Modules are advanced SiteApex features like Ads, Photo Albums, Forms, Blog, Calendar, etc. These features make it easy for you to create photo albums, complex forms, calendar of events and much more for your website. To learn more about modules, please visit our online knowledgebase.
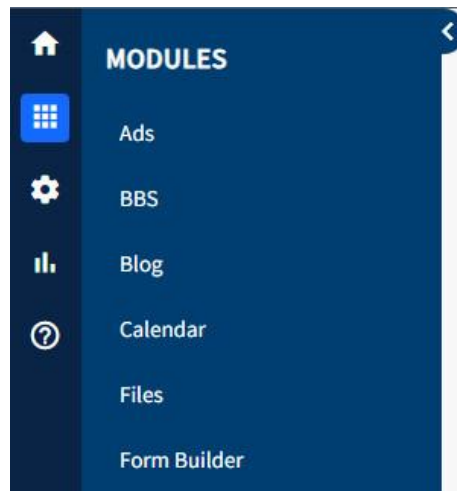
Control Panel

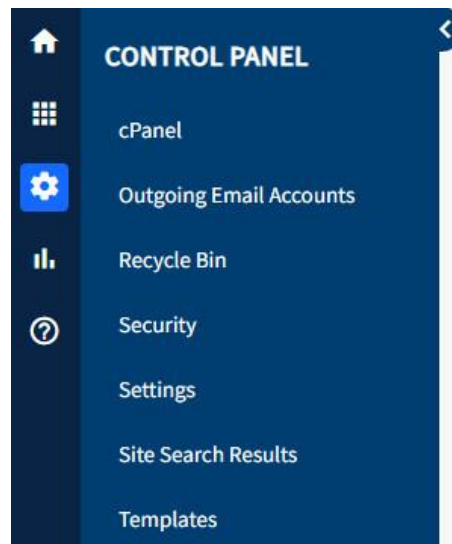The Control Panel contains additional options and features.

1. **cPanel** – Optionally, by logging into your cPanel account you can use this area to create *POP3/IMAP email addresses* and *email forwarders*. Another feature available is the ability to make redirects from delete pages or files to a new page or file. *Notes*: This login may be different from your SiteApex login, if you are not the main account holder consult the original admin of the website. Before making a *redirect* take note of the original file name first before deleting it.

2. **Outgoing Email Accounts** – Optionally, here you can set up email accounts to send outgoing SiteApex Notifications from using the sending email protocol SMTP. This authenticates the From email address. It is recommended to use emails with your same domain name.

3. **Recycle Bin** – If you delete any page from your website, it's going to go to your recycle bin so you can recover it later if you wish. If you click on the recycle bin you will see options to restore deleted pages or to purge the recycle bin to clear space on your hosting account.

4. **Security** – The Security area allows you to add, delete, or manage users of your website. You can set up specific users to have access to specific admin areas on your website only, set up newsletter recipients groups and much more. The security options with SiteApex are very advanced and allow you to do an incredible amount of things with users and site access. Please visit our knowledge base here for more information on SiteApex's security features and options.

5. **Settings** – Here you can find a few miscellaneous SiteApex settings:
   -Set your *Site Name* which appears in the title area of the page. This saves you from typing say your business or organization on each page title setting in the Site Map.

-Set your Homepage *Meta description* although if you set one under Site Map > Edit Home page > Advanced > and edit the Meta Description that will override the one set in the Settings area..

-Optionally you can edit the text used on the mobile menu for describing either opening or closing the menu on a mobile device. Not applicable to all sites as some site designs may have hidden this by design choice.

6. **Site Search Results** - If your website is equipped with a Site Search you can view the search results. This lets you analyze the search keywords your web site visitors are using to find content. Handy for learning what your site visitors are searching for and where your site is strong or if there is content that could be added.

7. **Templates** – Clicking on templates allows you to manage any plugins that have been added to templates on your website. More information in this support article.

Shopping Cart (Optional)

The Shopping Cart is where you can manage your online store. Add products, manage shipping methods/costs, check your orders and much more. This option is only available with certain packages. Please contact your site provider if you wish to add this option to your site.

For more information regarding the shopping cart, please go here.

Results

Here you can get a quick snapshot of the last month's site traffic. Please note this includes search engines and other bots visiting your site.

Help

The final area of SiteApex is the help page. The help section is an easy way to find links to the online knowledgebase, for submitting support tickets, checking the version log and more.

The Site Map – Managing Your Pages and Page Content

The Structure of the Site Map

The Site Map is organized into a hierarchy of sections, categories and pages. (*additional documentation on the sitemap*)

The Site Map represents how your primary website menu will be organized on your live website's primary menu.

- Sections are the top level menu items. Sections can only be created by clicking the **Add Section** button at the top of the Site Map.
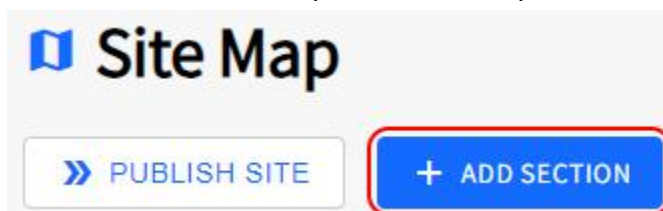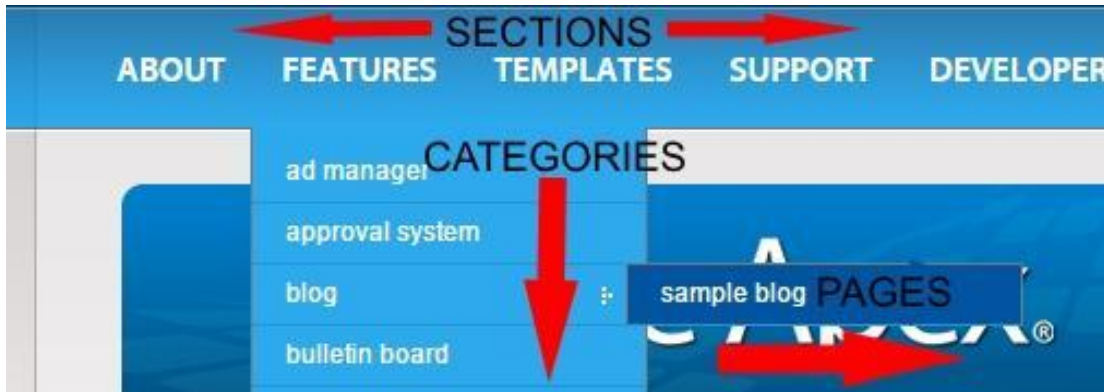

- Categories are listed under the Sections.
- Pages are listed under Categories.
- Once created you will see a clickable arrow to expand and view Categories or Pages under a Section.

Example of a live menu

Managing Your Website Pages

Still on the Site Map. Each Section, Category or Page has options that control higher level features of that web. page. (*online documentation link*)

Edit - Clicking the pencil icon ✏️ will open the page edit area. Tip: You can also click on the Name to open the edit screen.

Add Category / Add Page - ➕ This option creates a new page under the one you currently have opened. If clicking this on a section line, it would create a category. And if you click on a category, it would create a page for example. Hovering over the icon will tell you what it will create.

More Options icon ⋮ to the right of any section, category or page and it will display the following options:
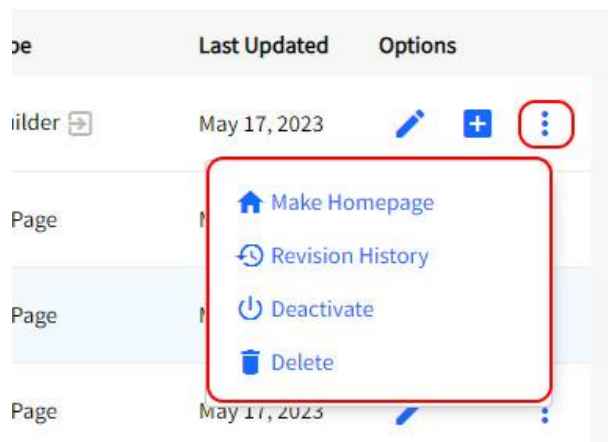
- **Make Homepage** - sets your website's default homepage. In theory you can set any page as your website's homepage but mind that typically you have a template specifically designed for your homepage.
- **Revision History** - Preview and Restore from 5 previous content backups
- **Deactivate/Activate** - disable a page fully. Deactivating deletes the live file. Activating requires a full publish to restore.
- **Delete** - Deletes the item and moves it to the Recycle Bin. Consider that it will remove any accompanying categories and pages. You can move attached categories and pages to other areas of the website by editing them first.

Editing Your Website Pages

In the Site map view clicking on the Name or click the pencil icon ✏️ you will open the pages editing area.

Type of page – "Normal Page" means this page has not had a module added to it such as a photo album or form for example. If a module had been added to the page, the 'Type of Page' would indicate what module was on it

Last Updated - Date that the page was last changed (Saved).

Name - the page Name appears on the primary menu of the website. The Name is also used as the file name if it is a new page.

Title – The Title is what will show on the browser tab when someone visits this particular page of your website. Search engines will also use this text as the link to get to your website from their search results pages.
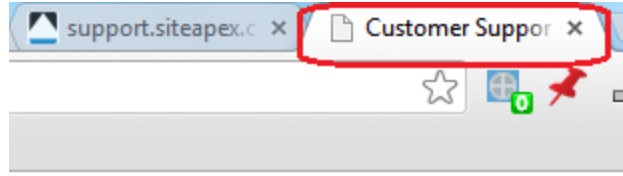
Editing Page Content

Most of the content editing within SiteApex is similar to other text editing or word processing software so we won't delve into basic content editing. However, below we'll go over some of the unique features of the SiteApex content editor *(Full Page Editing Documentation)*
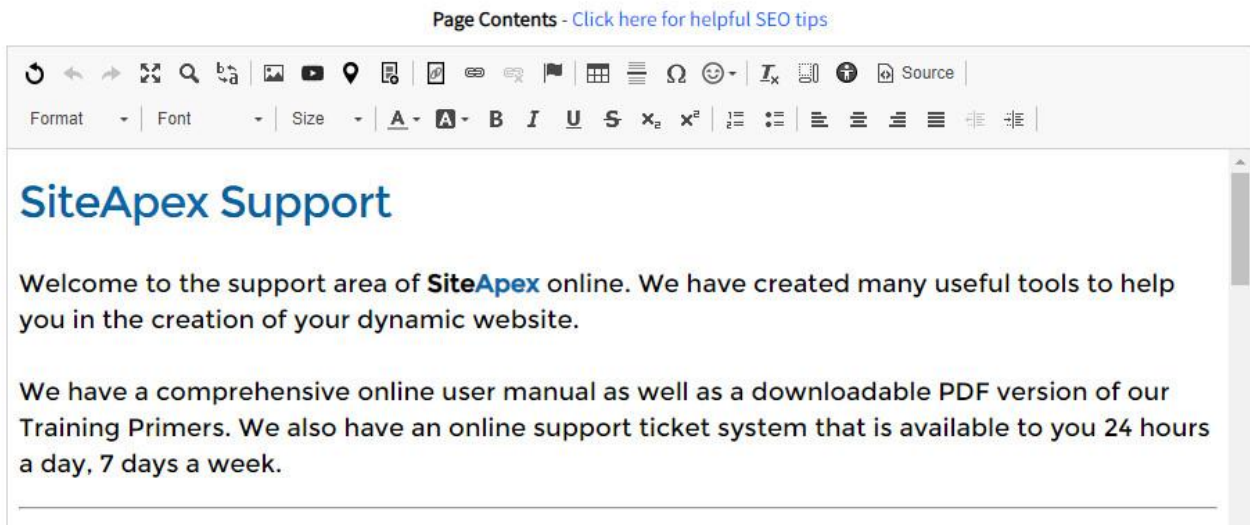
Adding Images

1. To add an image, first, set your cursor where you would like to insert the image among your current content.
2. Next, click on the **Image** icon in the editor toolbar.
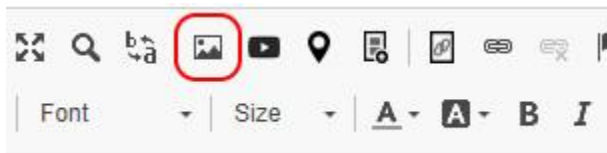
3. This opens up the image properties pop up box. Click **Browse Files** to choose your image from the Asset manager, and click Ok when you are done.

   Note: you can upload new images while you have the Asset Manager open with the **Upload** button. Follow the prompts to find the files from your device and choose them to upload.

Uploading or Selecting an Image –Click on Browse Files to upload an image or choose an existing image using our Asset manager. You can either select an image that has already been uploaded to your website by finding it in the list, clicking it and then clicking the Select button at the top (or double click the image to select faster). Or click the Upload link at the top to upload a new image from your computer. Then click select.

Alternative Text – This text description is important in making your website accessible (WCAG). The title is used by screen reader software to read visually impaired visitors and used by search engines to understand the image better.

Width x Height – you can resize how big your image will appear on your page.

Alignment – This option will align your image to the left or to the right of your page -> and cause the surrounding text to wrap around the image.

Captioned Image - Add a caption just underneath the image. The text edit will appear in the content editor after adding the image to the page.

Make Responsive - most modern designs have this built in automatically but you can force your images to stretch 100% when viewed on a mobile device by checking this option.

Margin – This allows you to add some buffer space around your image for design purposes. This can be good if you choose left or right align (above) as you can add some buffer space between the image and your text so things don't look crowded.

Border Style tab – Choose from a selection of prebuilt borders for your images.
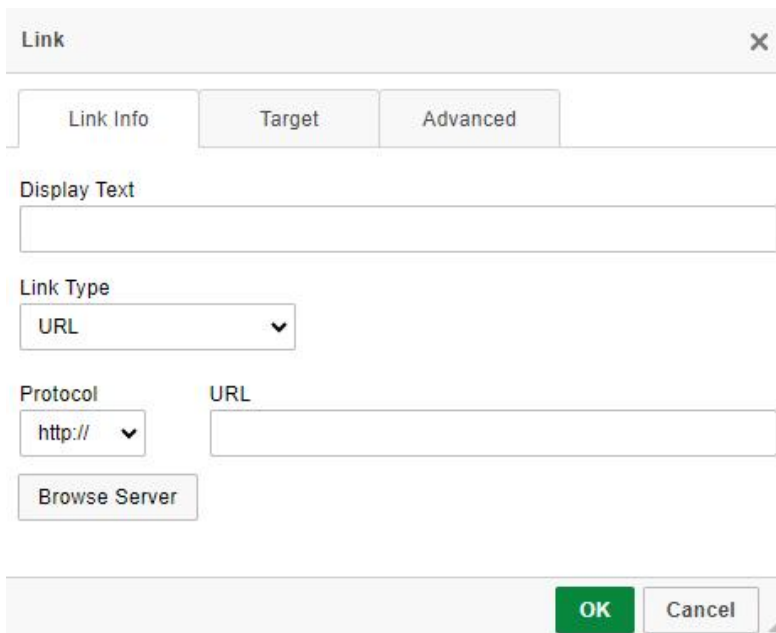
Adding hyperlinks
Linking To another Website

1. Start by adding text, highlighting text or clicking an image you wish to turn into a link.
2. Next, click the **hyperlink** icon on the content editor.

3. The Link properties box allows you to edit the link text, set the *Link Type*: URL, or phone number. *Protocol* – recommend https only. mailto if you are linking to an email address.

4. In the **URL field** enter or paste the website address you want to link to (example – google.com).
5. Next, go to the *Target* tab and choose if you want the link to **the Same Window** (the link will open in the current browser tab), in a **new window** (this will open the link in a new browser tab), or **open in a Popup** (beware browsers block most pop ups).
6. If you wish, give your link a Title. Go to the Advanced tab and use the Advisory Title field– the title is a little popup box that will show up if a website visitor hovers over the link on your page and help search engines know what the link is.
7. Click the **Ok** button to finish creating the link and go back to the content area.

Linking to another Page on Your own website

If you would like to link to another page on your own website, the easiest way to do this is by using the 'internal link' button'.

1. Start by clicking and dragging your mouse over the text you wish to turn into a link.
2. Next, click the internal link button in the editor toolbar.
3. A pop-up will come up showing a complete sitemap of your website. Find the page you wish to link to and double click it.

Linking To A File

Sometimes you may wish to create a link to a file such as a pdf or on image. Follow these steps to do so.

1. Start by adding text, highlighting text or clicking an image you wish to turn into a link.
2. Next, click the hyperlink button on the content editor.

3. Click on **Browse Files** to upload a file or choose an existing file using our Asset manager. Note: you can upload new files while you have the Asset Manager open with the **Upload** button. Follow the prompts to find the files from your device and choose them to upload.
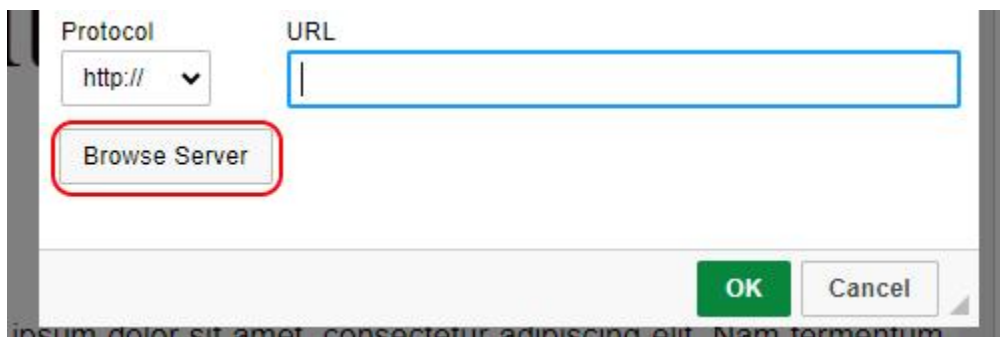
4. Once the file is found or uploaded double clicking it or clicking once and clicking the **Select** button at the top. It will display the file in the URL field. Do not edit the URL path.

5. Next, go to the Target tab and choose if you want the link to **the Same Window** (the link will open in the current browser tab), in a **new window** (this will open the link in a new browser tab), or **open in a Popup** (beware browsers block most pop ups).

6. If you wish, give your link a Title. Go to the Advanced tab and use the Advisory Title field– the title is a little popup box that will show up if a website visitor hovers over the link on your page and help search engines know what the link is.
7. Click the **Ok** button to finish creating the link and go back to the content editor.

Embedding YouTube Videos

The easiest and best way to add videos to your site is to use YouTube (http://youtube.com). YouTube offers the benefits of:

- Universal compatibility as almost everyone can view a YouTube video.
- Saves bandwidth on your account as the video stream is delivered from YouTube's servers, not your own website.
- Saves disk space on your account as the video is stored on YouTube's servers.

To add a YouTube video to your site, follow these steps.

1. Go to your video or head to http://youtube.com and find the video you would like to add to your website. If you need to upload your video to YouTube, follow their instructions.

2. Then copy the main URL of the video or the embed code found under the Share option. We recommend the video URL as you can control some additional options.

3. Next, in your Site Map, Edit the page you wish to add the video to. Place the cursor where you would like the video to appear in your content.

4. Click the YouTube button in your editor toolbar and paste in the embed code or the url of the videos page.
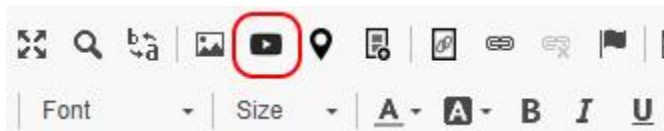
5. If you use the URL option you can customize a few options including size, and if you want the video to shrink based on the screen size (show full width on the page).
6. Click 'OK' to finish adding the video to your page.

Final Edit Options for your Page

You will find some advanced page options below the content editor at the bottom of the page edit. Remember to click on the blue help icon to learn more about the options.

File Name – this is the filename of your webpage – meaning it's the end of the url you would give to someone to visit that specific page on your website. So this page could be visited by going to domain.com/customer-support-s9.php.

Change File Name – This option allows you to change the filename of the page if you wish. You might wish to do this for search engine optimization reasons or just to change it to something that's easier to type or remember. It's recommended to always check **Redirect** the current name to the new one if you want search engines to see the change or if someone has saved the old URL.

Move To – Use this tool to move your page to another level of your website. Example. Make a Page into a Section or move a Category to a different Section.

Placement – You can use this drop down to change where this page shows up in your sitemap and live website menu.

Template – This allows you to choose which template is applied to the particular page you are working on. Templates are the page design and layout that surround your page content.

Reference Page – If you choose 'yes' here, this page will be published, but it will not show up in your website's menu. A letter 'R' will display beside it on the SiteMap.

No Index / No Follow - places a meta tag on your page (in the code only not visible) that instructs search engines to skip this page for Indexing and not check out any of the links on this page.

Draft Mode – Turn on draft mode if you want to save a page but do not want it to publish live yet. To make the page live when it is ready, either turn off draft mode and save or click the "Save & Publish" button to make it live immediately.

Non-Clickable – this allows you to create a menu item that cannot be clicked. This is handy for creating a heading to organize subpages under in your menu structure.
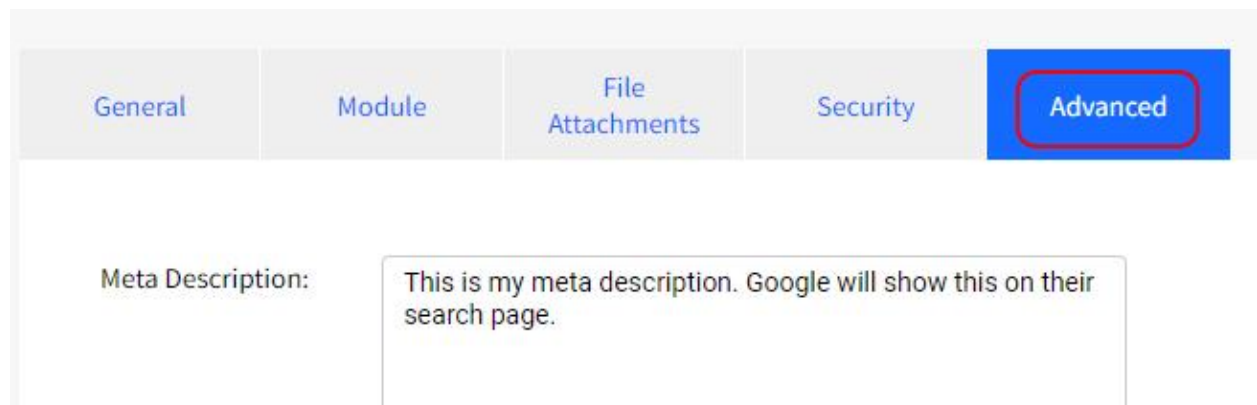
Link to alternative URL – allows you to create a menu item that links to another page or website.

Preview – This will open up a preview tab showing you the changes you've made so far.

Customizing the pages Meta Description [SEO]

A Meta tag is a small piece of code that is added to your web pages. No one sees this background content but they are read by search engines to determine what your website and/or webpage is all about.

You can customize the page's meta description that search engines use in the Advanced tab when editing a page thus overriding the site default for that page.

Use 1 or 2 short sentences to describe the content of the page. Include a summary of the content. Make sure to include words and topics related to the page content.

Savings Your Changes and making them live!

When done working on your page content, there are 2 options: **Save Changes** or **Save Changes and Publish**.

- Clicking on **Save Changes** will save the current page only and exit to the Site Map.
- Choosing **Save Changes and Publish** will save the page and publish that page immediately along with any other previously saved pages.

Publishing Saved Changes

If only Saved Changes was selected and you have pending Publishing to do. Click on the **Publish Site** button at the top of the Site Map page to publish all of your submitted changes to your live website.

A fly out menu will appear and show you the pages that were published. If it published all pages this likely means that you changed a page name, menu structure or another item that required the site to publish all pages.
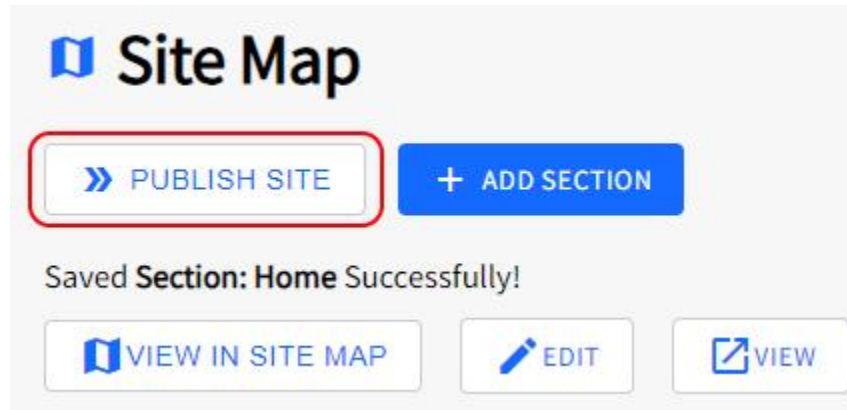
Creating Your First Module & Adding It to a Page

To get you familiar with how modules work and how to put them on your website, here we're going to walk you through creating your first module and adding it to a page on your website.

Modules are programmed to do advanced functionality that normal page content cannot do. Example, manage a blog, display a calendar and events on your site or collect visitors' contact information using a form.

We'll use the calendar module as an example on how to get a module started and live on your website. The general concept of creating a module and setting it up on your website is relatively the same across all modules.

1. Create a new calendar.
2. Add an event to that calendar.
3. Put that calendar on a page on your website.

Creating the Calendar

Go to **Modules** and click on **Calendar.**
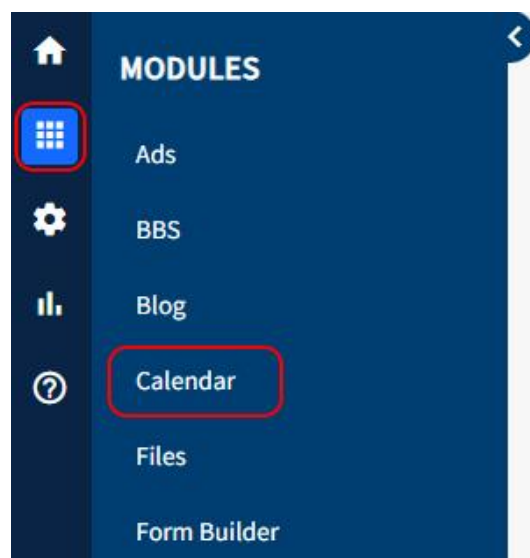
Click **Add Calendars** and give your calendar a name for referencing it in the Admin.

For now we will leave the rest of the options at their default settings. Note those options can be enabled or changed any time if you Edit the Calendar.

Proceed to the bottom of the page and click the 'Submit' button to create your calendar.
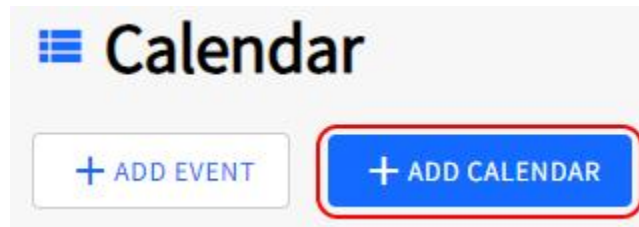
Adding a Calendar Event

Now that we have a calendar, let's add a calendar event to it…

1. If you're not already there, go to **Modules** and click on **Calendar** in the main menu..
2. Click on **Add Event**.
3. Fill in the event details:

- **Calendar** – choose which of your calendars this event should appear on (only applicable if you have more than 1 calendar).
- **Date** – Enter the date your event is occurring on.
- **Recurrence** – Choose if this event is only happening once, or if it is a recurring event.
- **Duration** – If your event is recurring, how many times is it repeating?
- **Event Name** – Give your event a name.

- **Create Categories** for your events, this allows you to add a colour code to your events. This displays on the calendar and in the event.
- **Start and End Time** – What time does your event begin and end?

4. Enter additional details for your event if you wish. These will show up if someone clicks on the event on the calendar on your website.

5. Leave the rest of the options as their defaults and click the **Submit** button at the bottom of the page to *save your calendar event*.

Putting the Calendar on Your Website

Now that you have a calendar and an event on that calendar, let's put it on your website for the world to see…

1. Go to your **Site Map** using the menu. Find the page you want your calendar to appear on and click the name or Edit icon   .

2. Click on the **Module** tab and on *Type of page*, choose **Calendar**.

3. Choose whether or not you want your calendar to appear above or below any content you may already have on the page.

4. Click the **Continue** button to save your calendar page.

5. You are now asked to choose which Calendar(s) you want to appear on the page and how you want them to appear. Choose your calendar and choose which calendar views you want available on your page and the default display when a site visitor goes to this page.

6. Click **Save Changes** or **Save Changes & Publish**. For more help on the calendar module visit the support documentation site here.

7. Visit the page on your website to see your new calendar.

| | | Search: | | | | Search Events |

| | | | | < | > | |

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18 6:30pm Committee Meeting	19	20	21
22	23	24	25	26	27	28

Additional Information

For additional information on how to use SiteApex please visit the online knowledgebase at
http://support.siteapex.com