SiteApex®

Getting started Guide

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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.

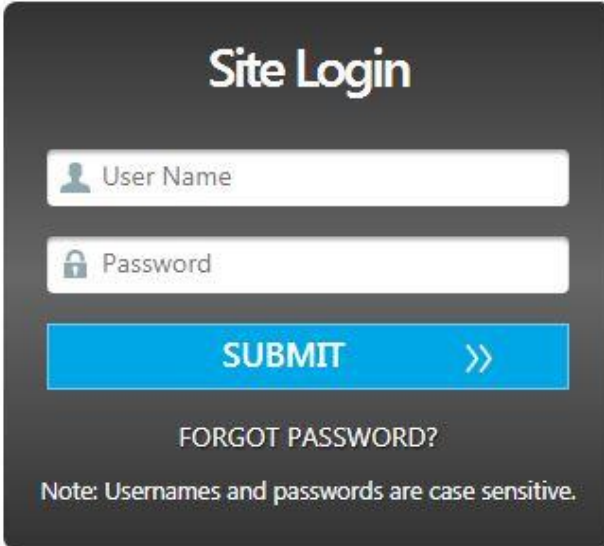## Additional Help & Guidance is Available!
- For additional information please visit our online knowledgebase at:
  http://support.siteapex.com

- When you are working within the administration area of your website, look for the buttons. These buttons pop up additional information explaining the features you are using.
- If you need technical support, please visit https://myhelpportal.com

Getting Logged in and Getting Familiar with the Admin Areas

Logging In to Your Admin Area
Visit **yourdomain.com/admin** and enter your username and password.

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

The Seven Areas of SiteApex

There are seven areas within SiteApex: Sitemap, Modules, Control Panel, Mobile, Shopping Cart, Results and Help. *Note: Mobile and Shopping Cart are not default modules.*

Sitemap

The sitemap is where you add, edit, and delete pages on your site. We'll come back to the Sitemap later as this is where were going to spend most of our time in this guide.
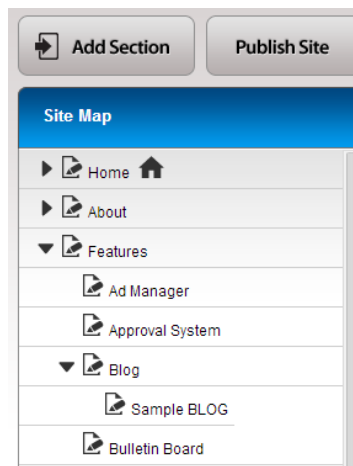
Modules

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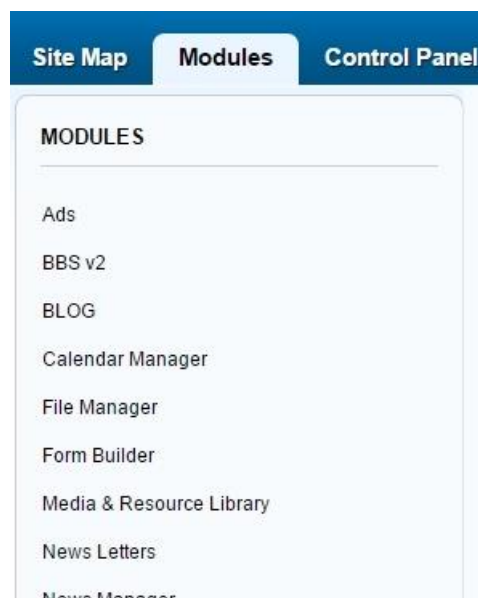
Control Panel

The control panel contains additional options and features.

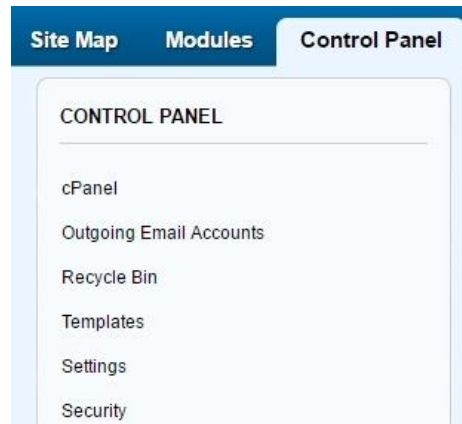1. **cPanel** – By logging into your cPanel account you can use this area to create *POP3/IMAP email addresses* and *email forwarders*. Another feature available is the ability to make redirects from delete pages or files to a new page or file. *Notes*: This login may be different from your SiteApex 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** – 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. **Templates** – Clicking on templates allows you to manage any plugins that have been added to templates on your website. Please see this article for more info about templates.
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 it on each page titles setting in the SiteMap.
   -Set your site wide *Meta description* which is helpful for search engines to determine what your website and/or webpage is all about. If you wish to apply a specific description to specific pages of your website, you can do so via the Sitemap (more info later). Any description added via the Sitemap will override the site description set up via the Control Panel for that specific page.
   -If you have a responsive website you can edit the text used on the mobile menu for describing either opening or closing the menu on a mobile device.
6. **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 knowledgebase here for [more information on SiteApex's security features](#) and options.

Mobile

The mobile area is where you can manage the pages, and look and feel of the mobile version of your website. This option is only available with certain packages. Please note we offer 2 mobile options. The second way being a responsive web layout that conforms the main site to the size of any screen. [Contact our sales team](#) if you are interested in making your site responsive! Don't know if it is? Try your website on a smartphone, if some content is cut off and you need to scroll to see it then it is not responsive.

[For information on managing your mobile website, please go here](#).

Shopping Cart

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. Further to this, we can integrate Google Analytics™ service here if you are on one of our marketing packages or have signed up for the SEO Intro package.

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 Sitemap – Managing Your Pages and Page Content

The Structure of the Sitemap

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

The Sitemap corresponds to how your menu will be organized on your live website.

- Sections are the main top level menu items. Sections can only be created by clicking the 'Add Section' button at the top of the Sitemap
- Categories would be under the main Sections of your menu.
- Then Pages would be organized under Categories.
- Once created you will see an arrow to view the Categories or Pages under a Section.
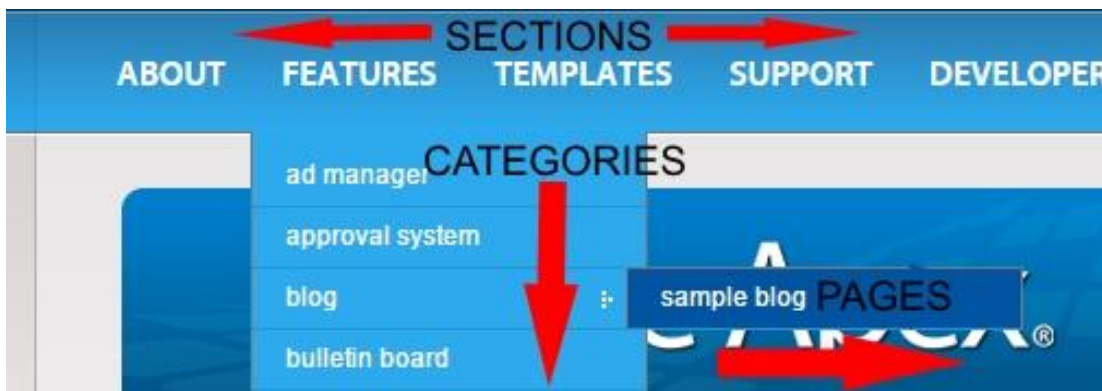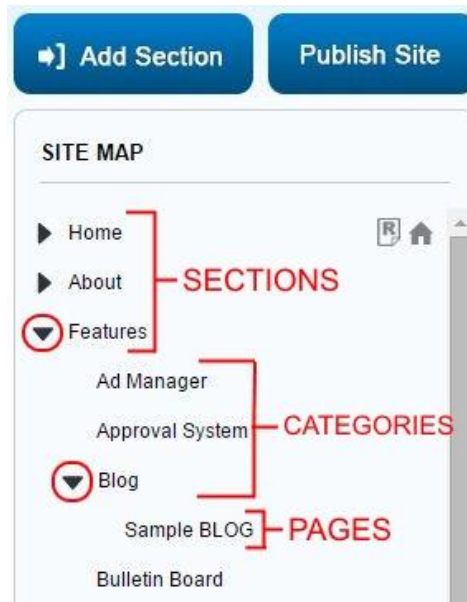
Managing and Editing Sections Categories and Pages

When you click on any page name in your sitemap you are presented with several options. The default option that loads is edit. (*online documentation link*)

Deactivate – this option keeps the page in your sitemap in the admin area, but removes it from your live website until you reactivate it again.

Preview – shows a preview of your content as you've completed it so far.

Edit – loads by default – this option allows you to edit the content of your page.

Delete – deletes the page from both your sitemap and your live website and sends it to your recycle in your control panel.

Revision History – SiteApex saves the last 6 revisions of your page. The revision history allows you to view previous revisions of your page content and restore it if you wish.

Make Homepage – this option sets the page you are working on as the default page of your website. So it will be the page that loads when someone visits yourdomain.com. Once you have set a homepage a house icon will appear in your SiteMap on that page.

Add Category or Add Page – These options create a new page under the one you currently have opened. If you have a section open, it would create a category. And if you currently have a category open, it would create a page.

Help – This is a quick link to our online knowledgebase dealing with page editing.

Page Options

If you click on any page in the Sitemap and open it for editing. You'll see the following option fields just above your content editor.

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

Name – This is the wording that will show for this page on your live website's menu. So for this page, if you were browsing this websites menu, the menu would show 'Customer Support' for this particular page.

Title – The title is what will show on the browser tab when someone visits this particular page of your website. Sometimes search engines will also use this term if they list your webpage in their search results.
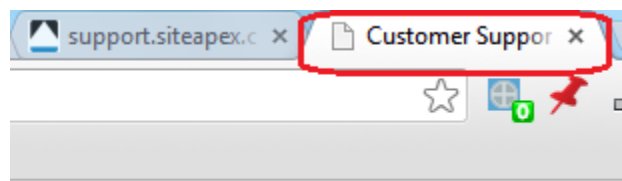
File Name – this is the filename of your webpage – meaning it's the end of the url you would give to someone to visit that specific page on your website. So this page could be visited by going to domain.com/customer-support-s9.php

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 recommend to check off "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.

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

Editing Page Content

Most of the content editing within SiteApex is similar to any 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… *(Additional online documentation is here*)
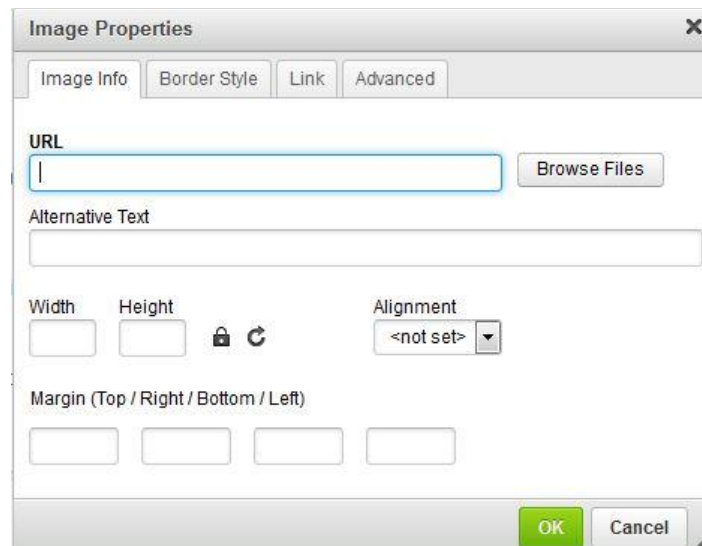

Adding Images

1. To add an image, first, move your cursor within the content to where you would like to insert the image.
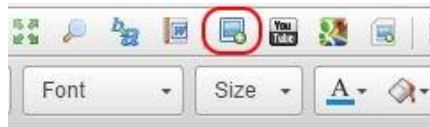
2. Next, click on the image button in the editor toolbar
3. This opens up the image properties pop up box. Click Browse Files to choose your image from the asset manager, and click Ok when you are done.

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 is text that will show on your webpage if for some reason the image can't load. It's helpful to use something descriptive here as the title is also used by screen reader software for visually impaired visitors.

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

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

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.

Link Tab – places a hyperlink on your image to a website or a file.

Adding hyperlinks
Linking To another Website

This section walks through creating a hyperlink (link) to another page or website on the internet.

1. Start by adding text, highlighting text or clicking an image you wish to turn into a link.
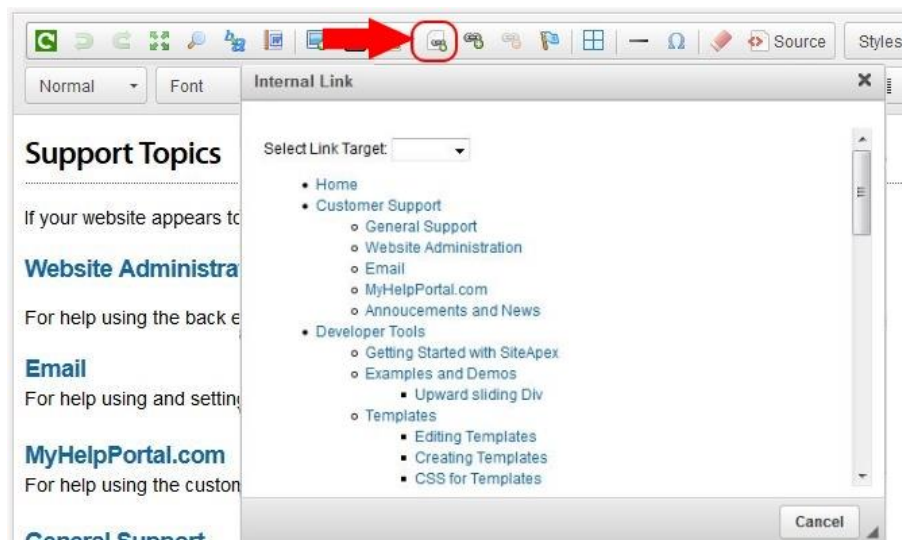2. Next, click the hyperlink button on the content editor.
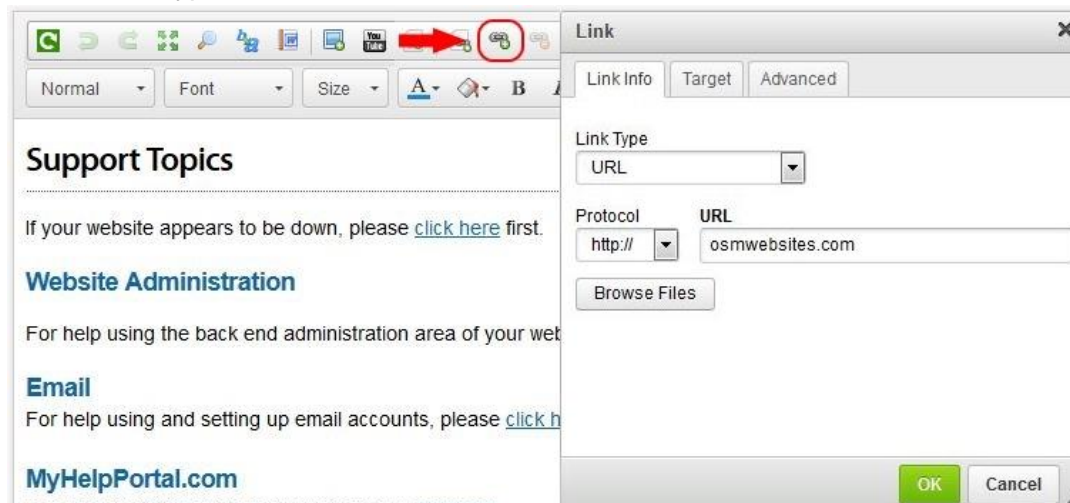
3. In the popup – choose your link type as URL, Protocol – http for regular links, https when you are linking to a secure page (like an online store), mailto if you are linking to an email address.

4. In the URL field enter 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 popups).
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.

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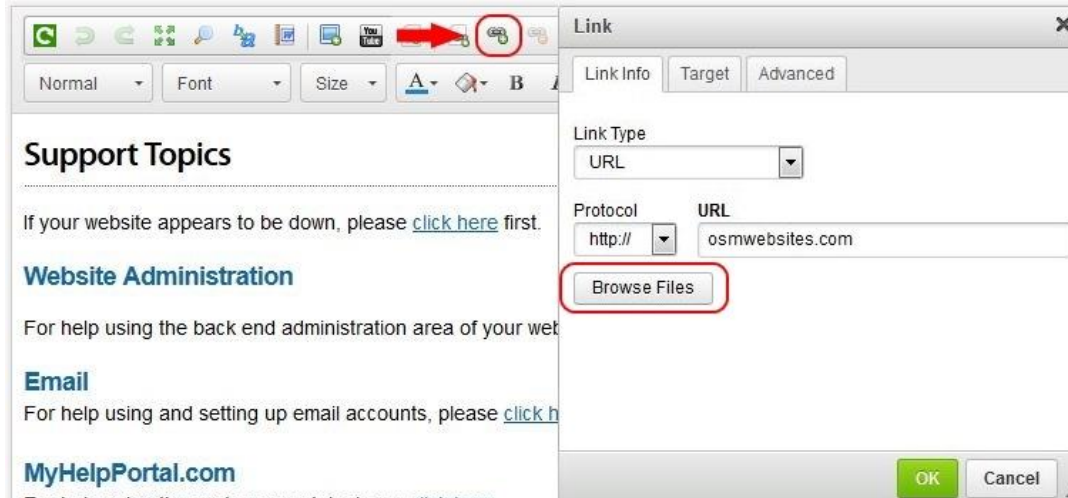
3. In the popup – choose your link type as URL.
4. Click on Browse Files to upload a file or choose an existing file using our Asset manager. You can either select a file that has already been uploaded to your website by finding it in the list, clicking it and then clicking the Select button at the top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

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 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. Then copy the url of the video or the embed code found under the Share option.
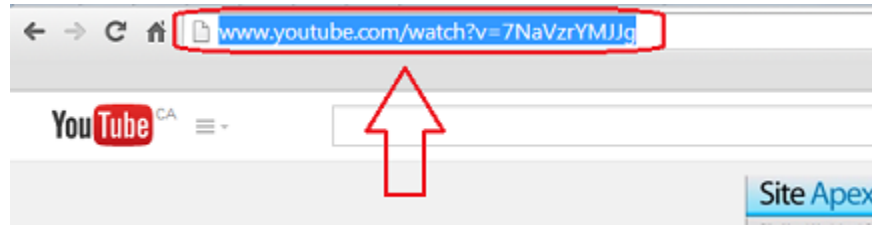
2. Next, in your sitemap, open the page you wish to add the video to for editing and click your cursor where you would like the video to appear in your content
3. Click the YouTube button in your editor toolbar and paste in the embed code or the url of the videos page.
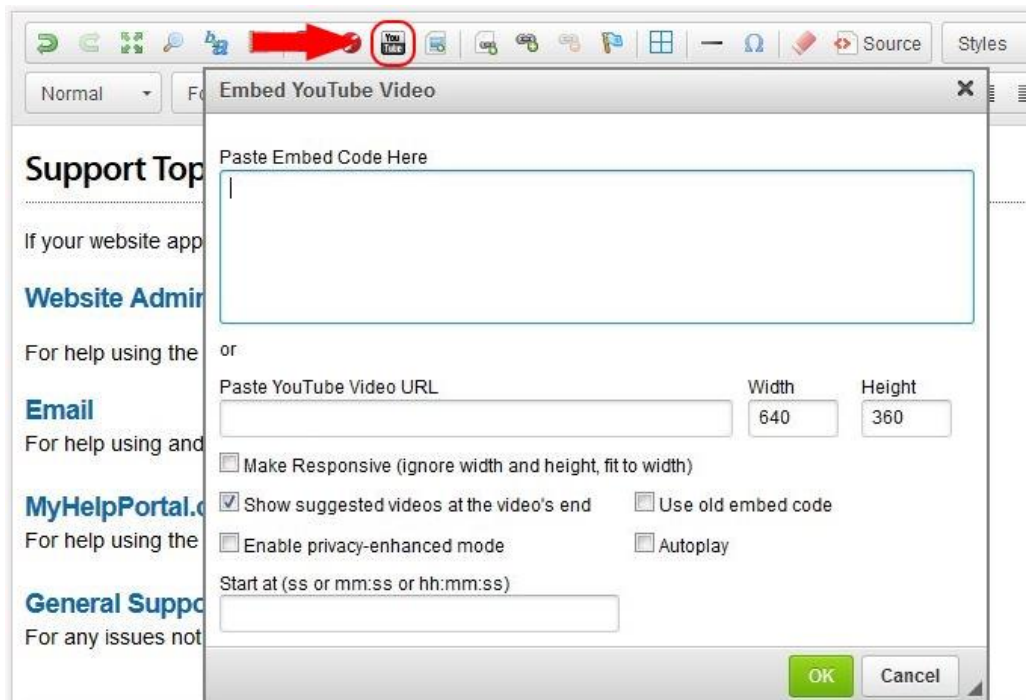
4. If you use the Video page URL you can customize a few options including size, and if you want the video to shrink based on the screen size (show full width on the page).
5. Click 'OK' to finish adding the video to your page.

Final Options for your Page

You will find these options below the content editor at the bottom of the page edit. Remember to click on the blue 'i' buttons to learn more about the options.

Template – This allows you to choose which template gets 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.

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 sub-pages 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.

Adding page specific Meta Tags

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.

We talked earlier about how the Meta description tag in the control panel will apply these pieces of code to every page on your website. If you wish to apply specific
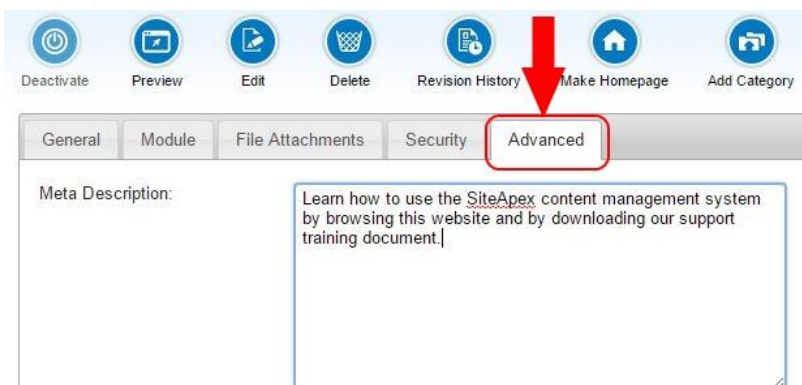
Meta descriptions to specific pages of your website, you can do so via the Sitemap and going to the Advanced tab when editing a page thus overriding the site default for that page.

Use 2 or 3 shorts sentences to describe the content of the page. Include a short summary of the content. Make sure to include key words or topics related to the page content.

Savings Your Changes and making them live!
Whenever you are done working on your page content, there are 2 options "Save Changes" or "Save Changes and Publish".

1. Clicking on "Save Changes" will save the current page you are editing and exit that pages edit screen.
2. Choosing "Save Changes and Publish" will save the page and publish that page immediately.

If you're ready for all your changes to show on your website, click on the 'Publish' button at the top left of the page to publish all of your submitted changes to your live website.

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…

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

Creating the Calendar

Go to 'Modules' (1) and click on 'Calendar manager' (2).

Click 'Add Calendars' and give your calendar a name and a description of your calendar. The description does not appear on your website. It is only used for reference in the admin area of your site.
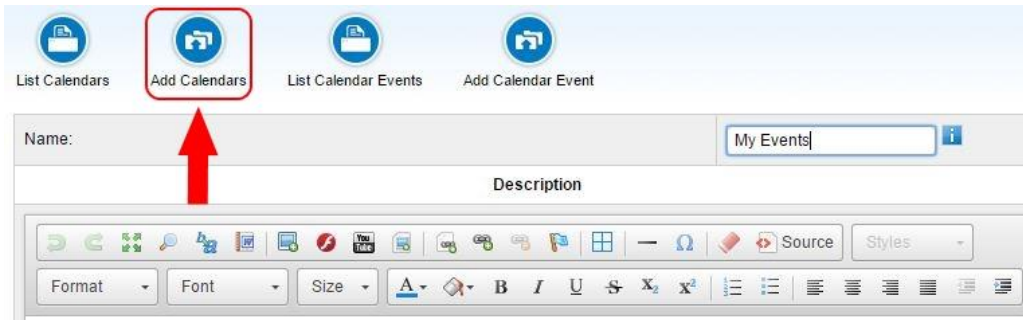
For now we will leave the rest of the options at their default settings. So proceed to the bottom of the page and click the 'Submit' button to create your calendar.

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' (1) and click on 'Calendar manager' (2).
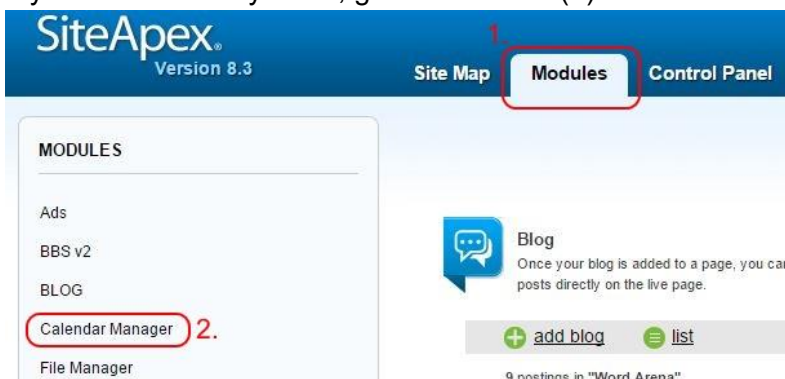
2. Click on 'Add Calendar Event'.
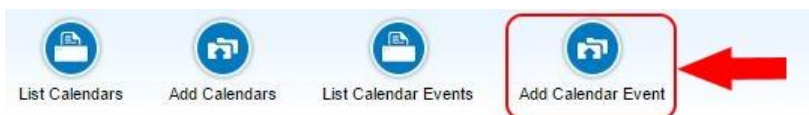
3. Fill in the event details:

- **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.
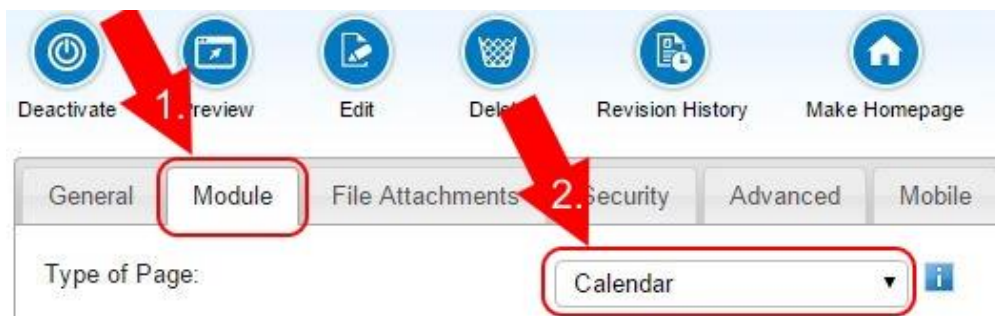
Putting the Calendar on Your Website

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 sitemap.
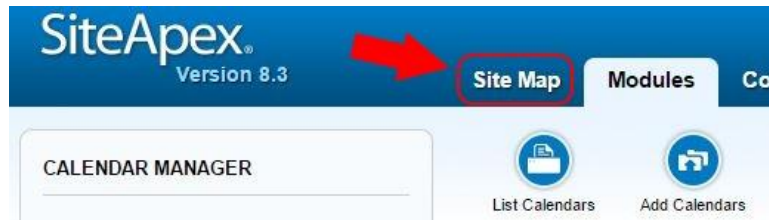
2. Find the page you want your calendar to appear on and click it for editing.
3. Click on the 'Module' tab (1) and where it says 'Type of page', choose Calendar (2).

4. Choose whether or not you want your calendar to appear above or below any content you might already have on the page and also which language your module needs to be in.

5. Click the Save Changes button to save your calendar page.
6. 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 fill in the other options and click 'Submit' to save your changes. For more help on the calendar module visit the support documentation site here.

7. Click the publish site button to make your calendar go live on your website.

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

Additional Information

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