Quikclicks

Thank you for purchasing a Quikclicks CMS Website. To edit your website please follow these steps.

CMS USER GUIDE

HOW TO EDIT YOUR WEBSITE

A guide to using your Content Management System

Overview

This manual will help you edit your website using the *Content Management System*. A content management system, or CMS (pronounced C-M-S), is any software that gives you the ability to update content on your website.
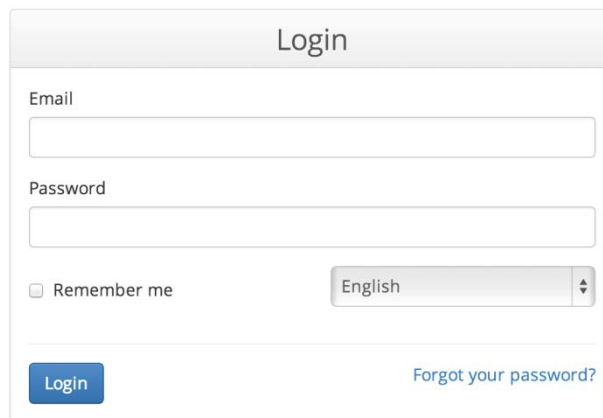
Accessing the CMS

To access the CMS, you will need a web browser and an Internet connection. All modern browsers are supported, including:

- Google Chrome
- Firefox
- Internet Explorer 8+ (for a better experience, use Internet Explorer 10 or above)
- Opera
- Safari

To access the CMS, navigate to the following website in your browser:

http://cms.quikclicks.com/login
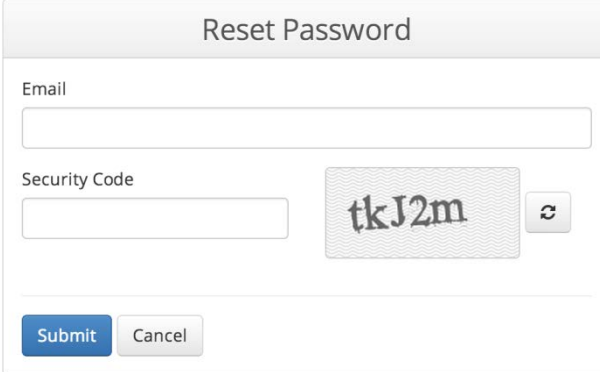

The login page will appear:
To login, use your email address and password.

Choosing Your Language

You can set your language preference from the login page and in the **Settings > Account** section. Your language preference will be saved in a *cookie* on your computer, so if you use another computer or clear your cookies, you will need to set it again.

Resetting Your Password

If you forget your password, you can reset it by selecting **Forgot your password?** from the login page. The *Reset*


Password page will appear:

Enter your email address and the security code shown on-screen and further instructions will be emailed to you.

If you don't receive an email after a few minutes, please check your junk folder

Sites

The first page you will see when you login will be the *Sites* page. Since the CMS is capable of managing multiple websites, your list will contain all of the sites you have access to. At any time, you can select the **Sites** tab to
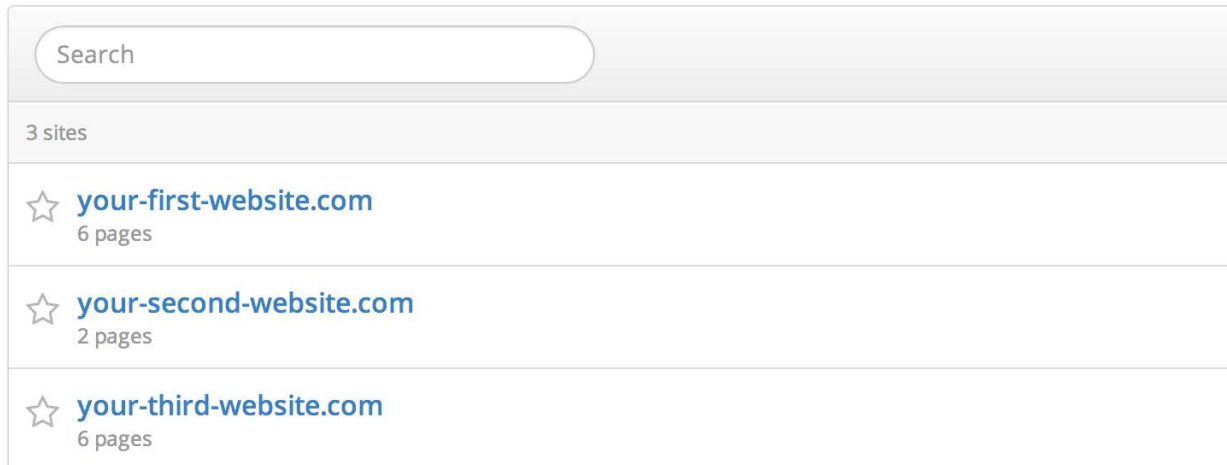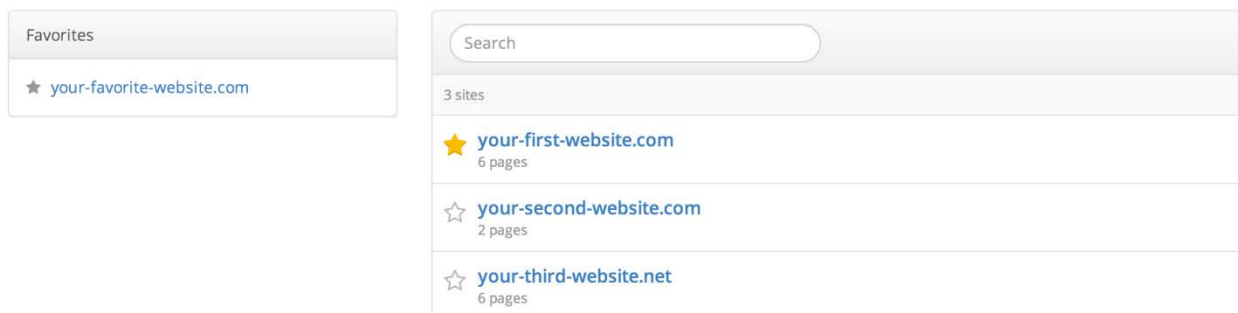

come back to this list.

To edit a site, select the appropriate one from the list. This will take you to the *Pages* page, where a list of pages you can edit will be shown.

Favorites

If you have access to more than one site, you may want to "star" the ones you'll be working with frequently for
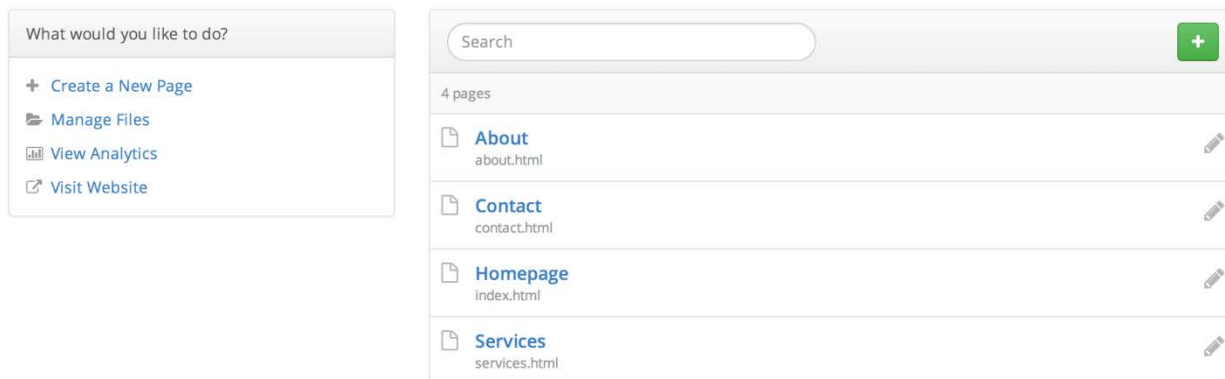

easier access. Sites in your *Favorites* list will appear on the left side of the *Sites* page:

To remove a site from your *Favorites*, just "unstar" it.

Pages

Once you've selected a site for editing, you will be taken to the *Pages* page. This section shows all the pages on

your site that you are able to edit. To edit a page, select its label from the list.

The sidebar on the left may have different options depending on how your site is set up. If you don't see an option mentioned here, it is not enabled for your site.

Creating New Pages

Most Quickclicks sites are set up to use the *duplicate* feature to create new pages (See page9).

Others will be configured to used the create page tool as follows, select **Create a New Page** from the sidebar or select [+]. This will bring up the *Create a New Page* dialog.


The following information is needed to create a page:

Label – A short, descriptive name for the page that will only be used to reference it *inside* the CMS.

Filename – The name of the new page without an extension. By default, the name will be generated from the label you enter.
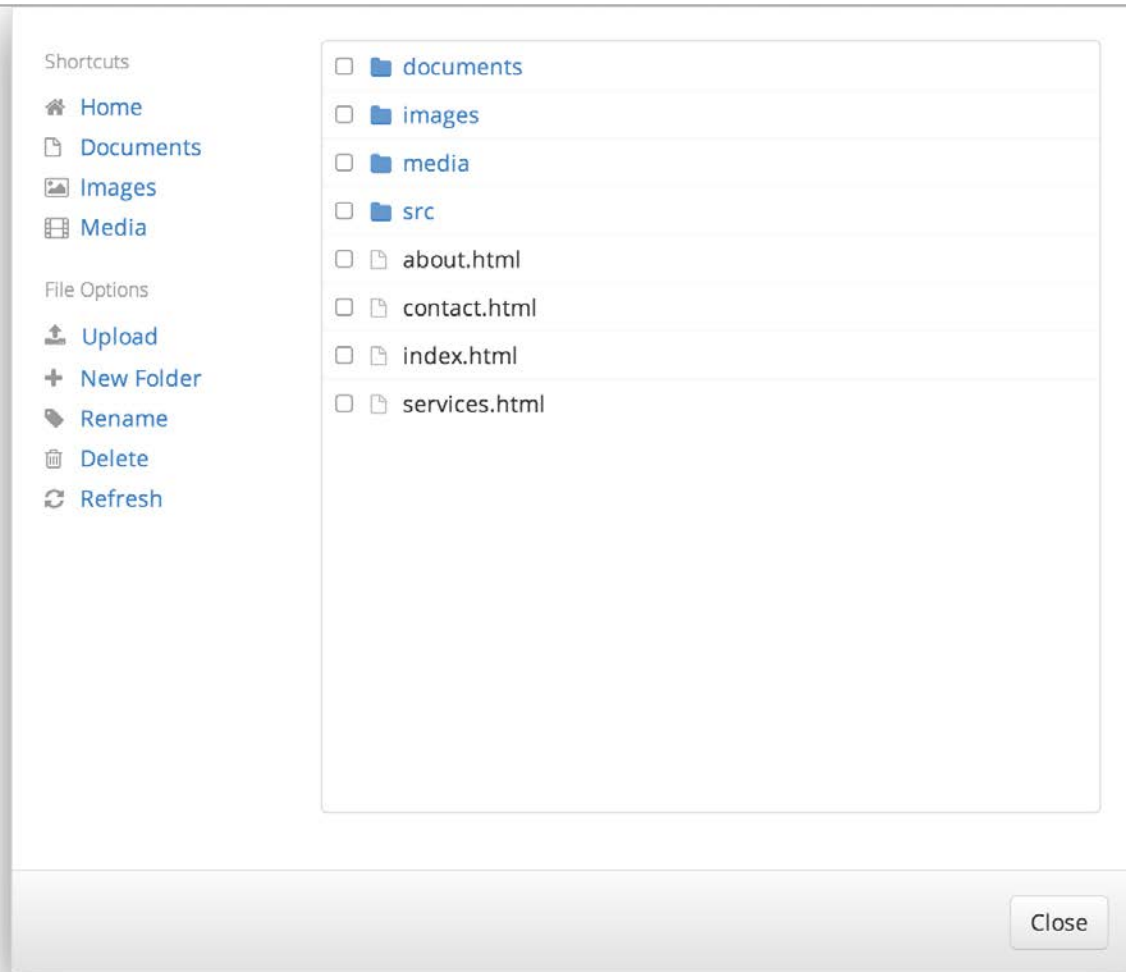
Template –Select the one you want to use for your new page.

Folder – The location where the page will be created. This will be your home folder by default.
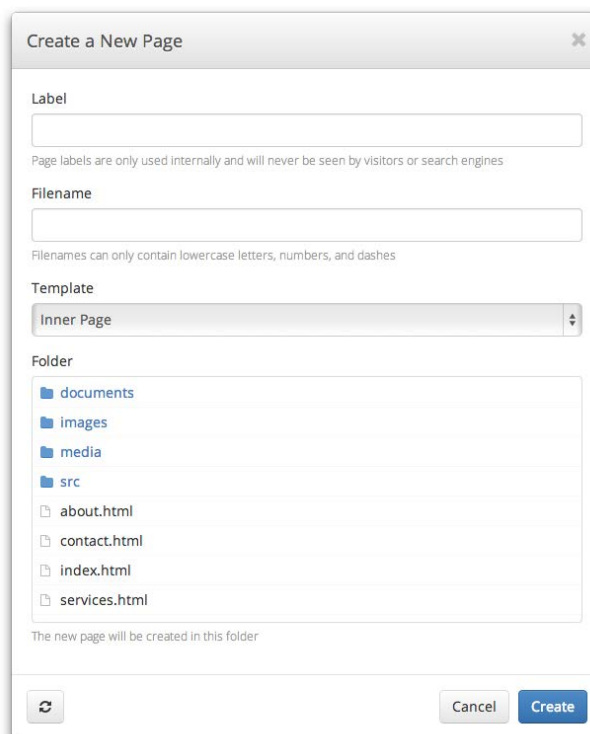
Managing Files

If this feature is enabled on your website, a link will appear in the sidebar of the *Pages* page called **Manage Files**.

Selecting this link will bring up the *File Manager*.

The *File Manager* gives you direct access to your web server. You can upload, delete, and rename files. You can also create new folders.

Shortcuts

The *File Manager* features shortcuts that quickly link you to the folders where documents, images, and media are stored. Always try to use these folders to organize your files and refrain from uploading them to the home folder.

Uploading

Before you can link to documents, images, and other files on your site, you need to upload them to your server. To upload a file, select the **Upload** link. A window will appear allowing you to browse your computer for files. Once you've selected one or more files, they will begin uploading.

Please allow sufficient time for uploading to complete, especially with larger files. Since files are uploaded to the CMS first and then to your website, this could take a bit longer than usual. The maximum combined file size for uploading is 50MB.

Creating Folders

You can create new folders to help organize files on your server. To create a new folder, select the **New Folder**
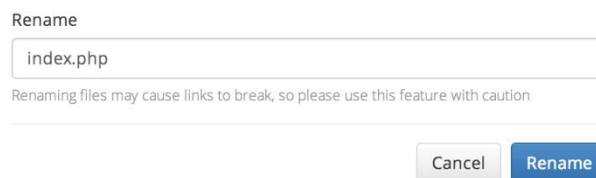
New Folder

Cancel   Create

link. The following form will appear:

Enter a name for the folder and select **Create**. The new folder will then appear in the *File Manager*.

Good folder names are short and descriptive. Try using all lowercase letters and use dashes or underscores instead of spaces.

Renaming Files

A file can be renamed by checking it off in the *File Manager* and selecting **Rename**. The following form will

Rename

index.php

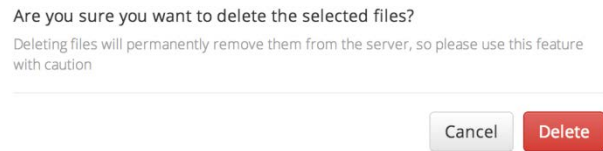Renaming files may cause links to break, so please use this feature with caution

Cancel   Rename

appear:

Enter a name for the file and select **Rename**. Be careful to not remove the file extension!

Deleting Files

Files can be deleted by checking them off in the *File Manager* and selecting **Delete**. The following confirmation

will appear:

To delete the selected files, select **Delete**.

Be careful when deleting files from your server—this cannot be undone! If you're not sure about deleting a file, ask your designer first!

Page Options

Each page has a dropdown menu with various options. To access the menu, select ✏ next to the appropriate

page. The *Page Options* menu will appear:

Relabel

Page labels are used to identify pages *inside* the CMS. To change a page label, select the **Relabel** option and enter a new label for the page.

Duplicate

This option allows you to create a new page by duplicating an existing one. To duplicate a page, select the **Duplicate** option and enter a new page label and filename (see *Creating Pages* for more details).

Move

Moving pages allows you to organize them in folders. To move a page, select the **Move** option. You will be prompted to browse for the folder you want to move the page to.

Be careful when moving pages, as this will break any links you have that point to the affected page. If you do move a page, double check that you've updated all your links afterwards.

Delete

To permanently remove a page from your server, select the **Delete** option. The page will be removed from the CMS *and* deleted from the server.

Be careful when deleting pages from your site—this cannot be undone! If you're not sure about deleting a page, ask your designer first!

Editing

Once you've selected a page to edit, you will be taken to the *Live Editor.* The *Live Editor* is a limited version of your page that lets you edit content and shows what changes will look like once they're published. By design, you will not be able to follow links or navigate away from the page while editing your site in the *Live Editor.*

Editable Regions are sections of the page that have been enabled for editing. They are indicated by gray edit
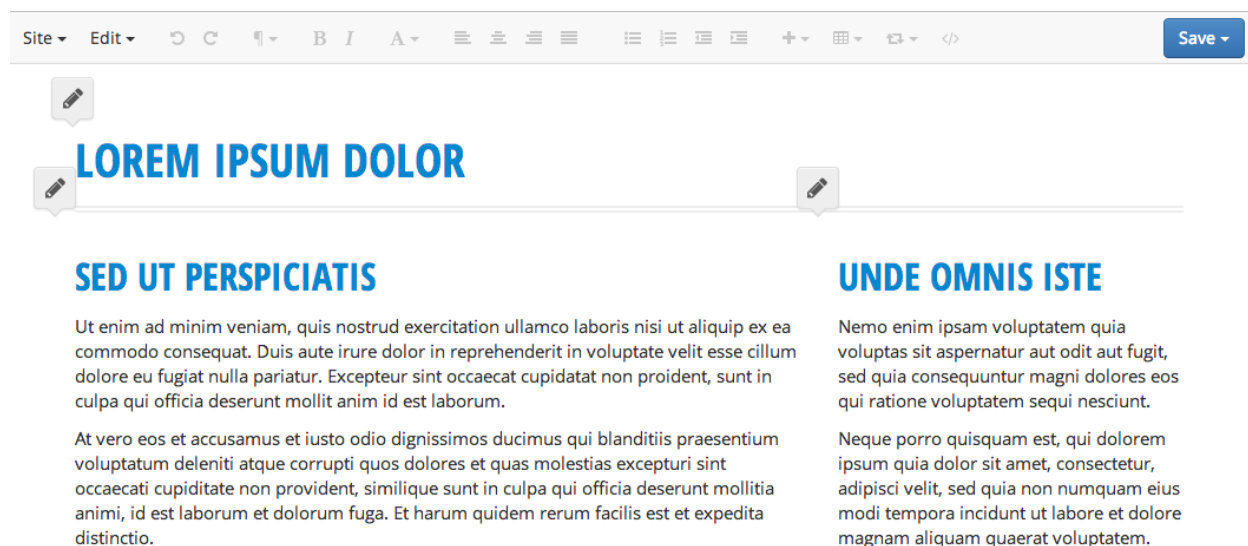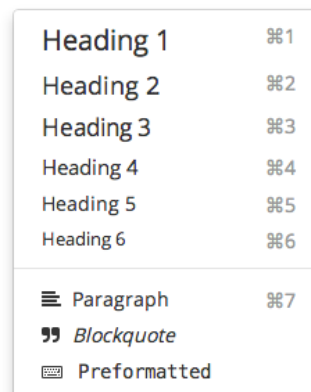

bubbles:

Editing Content

To edit a region, select an edit bubble or place your cursor anywhere inside an editable region. Depending on the region, various features will be made available in the *Live Editor's* toolbar.

Headings & Paragraphs

The *Paragraph* menu lets you format entire blocks of text into headings, paragraphs, block quotes, or pre-formatted text.

To create a heading, place your cursor inside an *Editable Region* and select ¶▾. The *Paragraph* menu will appear. Select the desired heading level and the block your cursor is in will turn into a heading. You can also format a paragraph as a block quote or as pre-formatted text.

To remove a block format, place your cursor in the desired block and select **Paragraph** from the *Paragraph* menu.

Text Formatting

To apply formatting such as bold, italic, and underline to text, highlight the desired text and select ⬛. The *Text Formatting* menu will appear. Select the desired format and it will be applied to the highlighted text.

To remove a format, select it again from the *Text Formatting* menu. To remove all formatting, select **Remove Formatting**.

If your designer has enabled **Font Styles**, you can use this option to change the font, size, color, and background color of text.
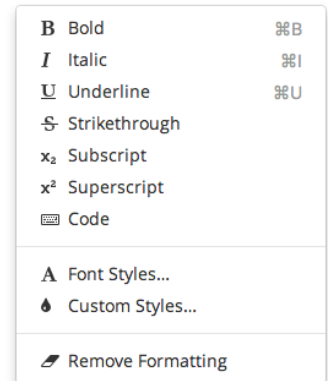
Similarly, you can use **Custom Styles** to select from a list of predefined styles that your designer has configured.

On websites, underlining text is typically reserved for hyperlinks and may be considered bad usability. When you need to emphasize text, consider using bold or italic instead.

Alignment

Use the *Alignment* buttons in the *Live Editor's* toolbar to align text left, right, center, or justified. You can also use the alignment buttons to float an image left or right.

Lists

Use the *List* buttons in the *Live Editor's* toolbar to create ordered and unordered lists. Make nested lists using the *Indent* and *Outdent* buttons.

Links

To insert a link to another page or file, highlight the desired text, go to ➕▾, and select **Link**. This will bring up the *Link* dialog.

Enter a URL or select 📁 to browse for a file on your server. If you'd like the link to open in a new window, check the **Open in a new window** box. When you're finished, select **Submit** to create the link.
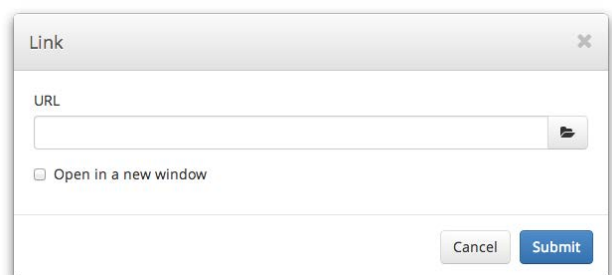
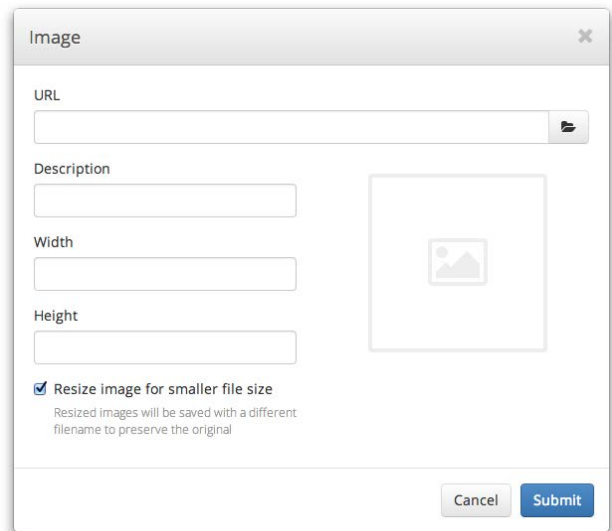To edit an existing link, place your cursor on it and select **Insert > Link**.

Images

To insert an image, place your cursor inside an *Editable Region*, go to [+ ▾], and select **Image**. This will bring up the *Image* dialog.

Enter a URL or select [📁] to browse for a file on your server. After a URL has been entered, a preview of your image will appear on the right side of the dialog.

Providing a *Description* is recommended, as this will aide users who have images disabled, users with text-based browsers, and users with disabilities that prevent them from seeing images.

Once you've entered a URL and a description, select **Submit** to insert the image into your page.

To edit an existing image, place your cursor on it and select **Insert > Image** or double-click on it.

If desired, you can crop an image by dragging a selection over the preview in the *Image* dialog. When an image is cropped, the original file is left intact and a new one is created.

By default, images will be physically resized when a smaller width or height is entered. This optimizes them so they load faster, but the option can be disabled by unchecking the **Resize image for smaller file size** box.

When cropping or resizing an image, the original file will never be modified. Instead, a new file will be created with the dimensions appended to the filename. This lets you "undo" your changes anytime by reverting back to the original image.
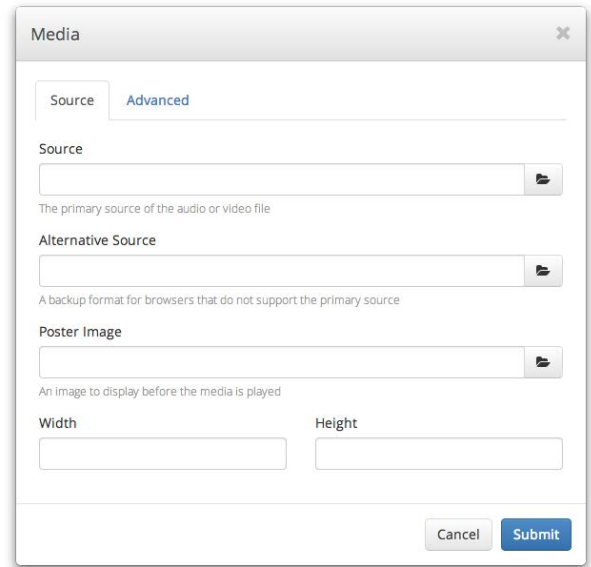
Media

To insert a video or audio file into your page, place your cursor inside an *Editable Region*, go to [+ ▾], and select **Media**. This will bring up the *Media* dialog.

The CMS supports HTML5 videos, YouTube videos, and Vimeo videos.

To insert an HTML5 video or audio file, you will need to specify a **Source**, an **Alternative Source** (optional, but recommended), and a **Poster Image** (optional).

*To maximize browser compatibility for videos, use an MP4 format for your **Source** and a WEBM format for your **Alternative Source**.*

To insert a YouTube or Vimeo video, copy the full URL (from your browser's address bar) into the **Source** field. You can also paste the embed code into the **Embed Code** field under the **Advanced** tab.

To edit an existing video or audio file, place your cursor on it and select **Insert > Media** or double-click on it.

Anchors

Anchors let you deep-link into a specific section of your page. To create an anchor, place your cursor in front of the heading you want to link to, go to [+ ▾], and select **Anchor**. This will bring up the *Anchor* dialog.

Enter a name for your anchor. Since anchors must follow a special naming convention, the CMS will automatically convert the value you enter into a compatible name.
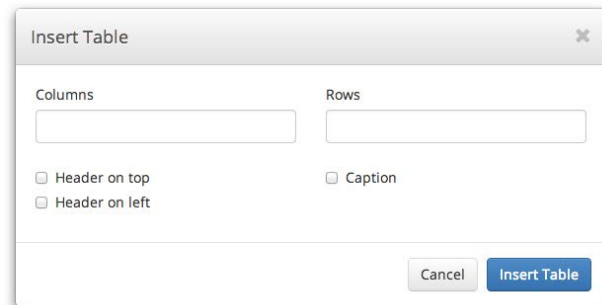
Anchors are normally not visible on webpages, so once an anchor has been inserted into your page it will appear as a [symbol]. symbol. This allows you to identify and edit anchors, but the symbol will not appear on the live site.

To edit an existing anchor, place your cursor on it and select **Insert > Anchor** or double-click on it.

Inserting Tables

To insert a table into your page, place your cursor inside an *Editable Region*, go to [⊞ ▾], and select **Insert Table**. This will bring up the *Insert Table* dialog.

Enter the number of columns and rows for your new table.

If you want your table to have a header that spans across the first row of your table, check the **Header on top** box. If you want your table to have a header that spans across the first column of your table, check the **Header on left** box.

To add a caption to your table, check the **Caption** box.

Once you've configured the table options, select **Insert Table** to insert the table into your page.

Editing Tables

You can edit existing tables using the *Table* menu. To open it, go to ⊞▾ and select the appropriate option. You can add and remove rows and columns, merge and split cells, or delete the table entirely.

Repeatable Regions

You may have *Repeatable Regions* on one or more of your pages. These are useful for many things, as they allow you to add, remove, and reorder blocks of content very easily.

Repeatable Regions are indicated by a thin, dashed border. When your cursor is inside a *Repeatable Region*, the ⟳▾ button will become available in the *Live Editor's* toolbar. Selecting this button will bring up the *Repeatable Regions* menu which has options to add, remove, and reorder blocks of content.

FIRST REPEATABLE REGION
April 4th
Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

SECOND REPEATABLE REGION
April 20th
Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

THIRD REPEATABLE REGION
April 30th
Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem.

If you find yourself working with Repeatable Regions often, take note of the shortcut keys shown in the menu. They can save you quite a bit of time!

Editing Photo Galleries

If your site has a photo gallery, it may be set it up to be editable in the CMS. To edit a photo gallery, select it by clicking or tapping on it. This will bring up the *Gallery* dialog.

You can add photos by selecting the **Add to Gallery** link.

To highlight a thumbnail, click or tap on it. To select more than one thumbnail at a time, press CMD or CTRL while clicking or tapping. You can also select a range of images by holding down SHIFT.

When a thumbnail is selected, the **Link** and **Description** fields will become available. You can use these fields to customize where each photo links to (usually the full-size version of themselves) and the description that visitors will see for each photo.

To reorder photos, highlight one or more thumbnails and select **Move Up** or **Move Down**. (You can also drag and drop on desktop devices.)
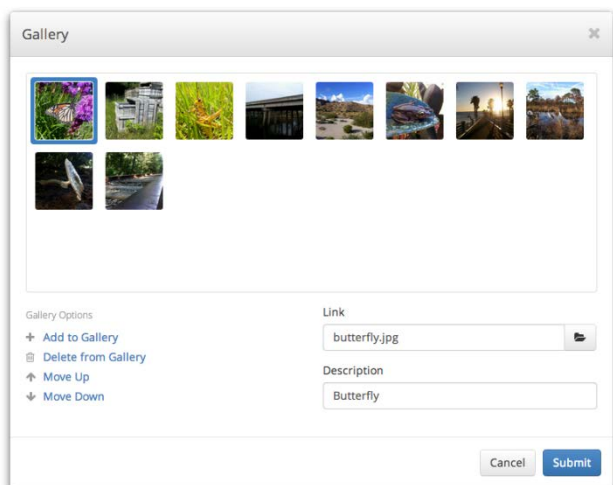
To delete photos from the gallery, highlight one or more thumbnails and select **Delete from Gallery**. Note that this will not delete any files from your server.

When you're done editing your gallery, select **Submit** to save your changes.
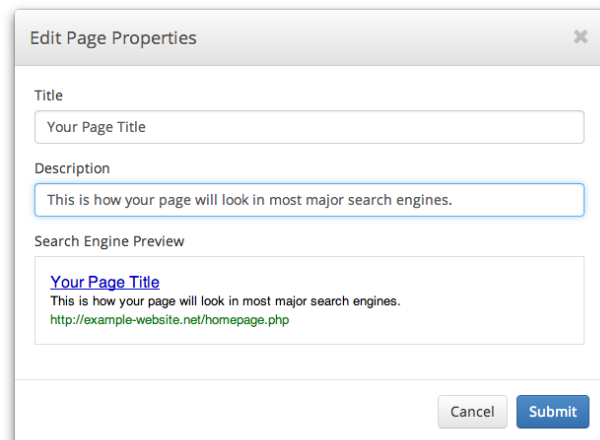
Editing Page Properties

Page Properties include the *Title*, *Description*, and *Keywords* that are used to tell search engines information about each page. If your designer has this feature enabled, you can change these values for each of your pages by going to **Edit > Edit Page Properties**. This will bring up the *Edit Page Properties* dialog.

Title – This is usually the first thing people see when viewing your site in a search engine, so make it interesting but not too long.

Description – This typically appears under the *Title* in a search engine's results. Keep them short but relevant. Remember that you are limited to a varying number of characters depending on the search engine a potential visitor may be using.

Keywords – A list of comma-separated words and phrases that relate to the content of your page. You may add as many keywords as you like, but three to five are usually sufficient.

Search Engine Preview – This will show you what your page will look like in most major search engines. The maximum lengths for titles and descriptions will vary, but this will give you a good idea of how potential visitors will see your page when browsing a list of search results.

Publishing Pages

Publishing

When you're finished editing a page, you'll need to publish your changes before they appear on the live version of your site. To publish a page, go to **Save ▾** and select **Publish**. When you see the ✔ symbol appear in the center of your screen, your page has been published and you can safely exit the editor.

Auto-publishing

You can tell the CMS to publish your changes at a specific date and time. To *Auto-publish* a page, go to **Save ▾** and select **Auto-publish**. This will bring up the *Auto-publish* dialog.
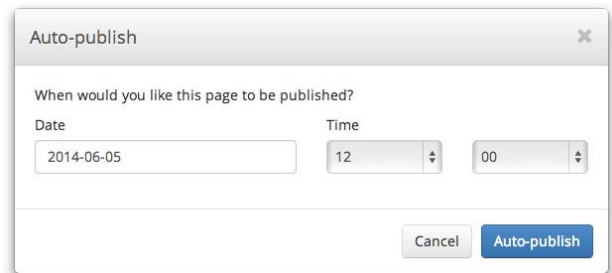
Enter the date and time that you want your changes to be published and select **Auto-publish**.

Auto-publish	✕
When would you like this page to be published?	
Date	Time
2014-06-05	12 ⬍ 00 ⬍
	Cancel Auto-publish

When you see the ✔ symbol appear in the center of your screen, your changes have been scheduled for publishing and you can safely exit the editor.
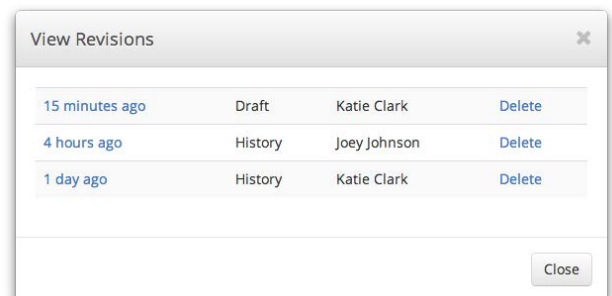
Saving Drafts

If you want to save your changes but don't want to publish them to the live site yet, you can save a *Draft*. To save a draft, go to **Save ▾** and select **Save Draft**. When you see the ✔ symbol appear in the center of your screen, your draft has been saved and you can safely exit the editor.

The next time you open the page for editing, you'll be asked if you want to resume editing the draft. You can also access it by going to **Edit > View Revisions**.

Loading Revisions

Every time a page is saved in the CMS, a *Revision* is created. You can view all the revisions of a page by going to **Edit > View Revisions**. This will bring up the *View Revisions* dialog.

To open a revision for editing, simply select it from the list.

View Revisions			✕
15 minutes ago	Draft	Katie Clark	Delete
4 hours ago	History	Joey Johnson	Delete
1 day ago	History	Katie Clark	Delete
			Close

You can also delete revisions you no longer need. Just remember that once a revision is deleted, there's absolutely no way to get it back!

Settings

Updating Your Personal Info

You can manage your account settings by selecting **Settings** from the main menu.
To make changes, simply update your name, email and/or language and select **Update**. You can also change your password by selecting the **Change** button on the right side of the page.

Your language preference will be saved in a cookie on your computer, so if you use another computer or clear your cookies, you will need to set it again.