USER MANUAL

ACCUCMS VERSION 5.0

BLUE ARCHER

AccuCMS Version 5.0 User Manual

Thank you for choosing Blue Archer!

AccuCMS simplifies website maintenance without restricting your creativity or control. This intuitive management interface allows users like you to independently modify your website content without having to learn a programming language. That said, users with more advanced skills have access to the HTML code for further customization.

As an AccuCMS User, you can:

- Drastically reduce maintenance costs by making your own changes to your website
- Update the content and visuals on your website to better reflect the changing needs of your organization

AccuCMS allows you to:

- Add and change your website's text, images and graphics
- Add/edit/delete an unlimited number of pages on your website
- Make changes to your website's navigation
- Create forms, mailing lists and more

TIP: Using the most current version of your browser is best practice when using AccuCMS.

Logging in to AccuCMS

To access the system:

1. Open the latest version of an Internet browser, either Google Chrome or Edge Chromium on Microsoft Windows, or Google Chrome on MacOS.
2. Enter your AccuCMS website manager URL.
   a. Example: www.yourwebsite.com/manager
3. You will be taken to the login page:
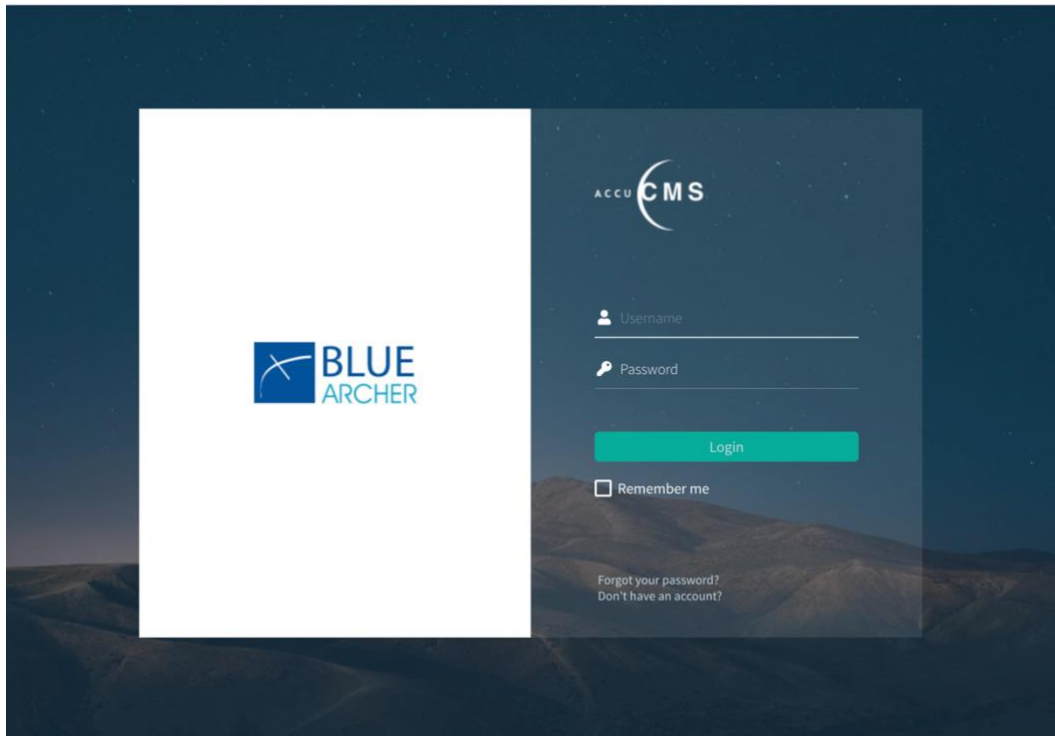
4. Enter your username in the "Username" field.
5. Enter your password in the "Password" field.
6. Click the [Login] button.

You are now logged in to the AccuCMS site manager, and viewing the dashboard. This dashboard allows you to access any area of the CMS according to your permission levels.

Login Failed

Forgot your password?

1. Click the "Forgot your password" link at the bottom of the login screen. This will redirect you to the "Forgot your password?" screen.
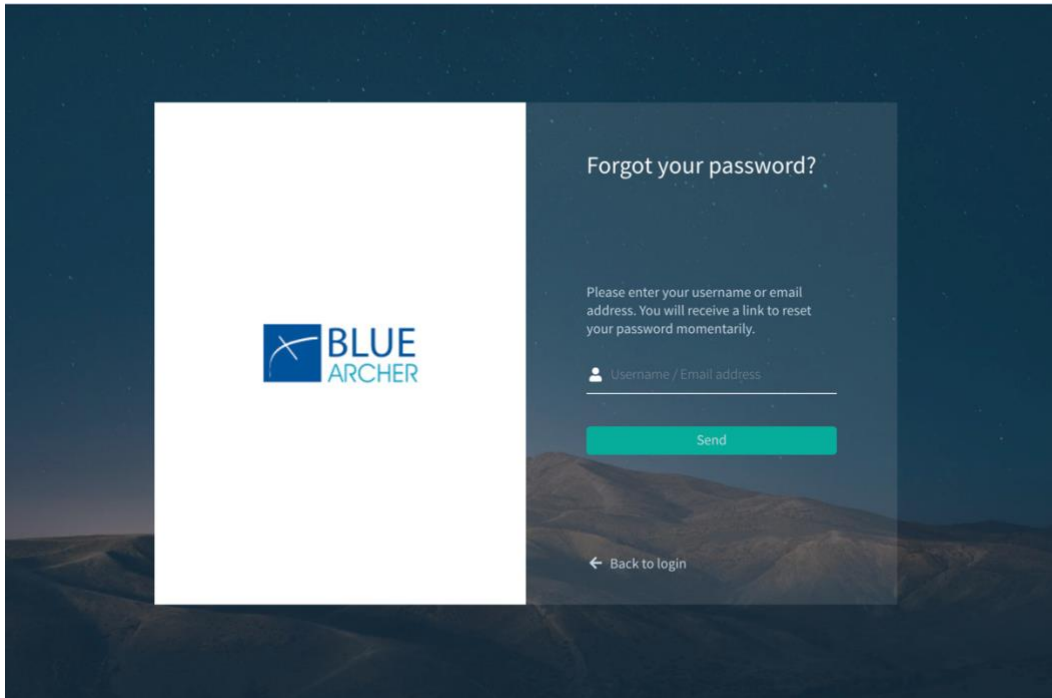
2. Re-enter your username or email address.
3. Click [Send].
4. An email will be sent to your email account with further instructions on how to reset your password.

Don't have an account?

If you do not have a CMS username, reach out to the contact on your team who oversees the management of your website or contact support@bluearcher.com.

AccuCMS Overview

Admin Panel

The Admin Panel, located in the upper left corner of your screen, is where you will manage your user account settings, view the front-end of your website, and logout of AccuCMS.
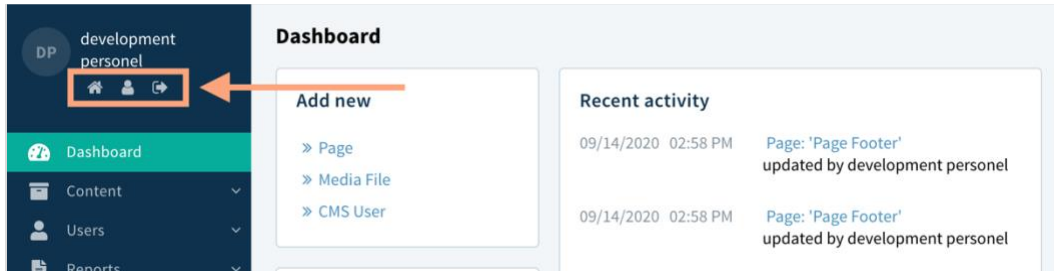
1. The , opens the homepage of your website.

2. The icon directs you to your CMS user settings.

3. The icon logs you out of AccuCMS.

Main Menu

Everything you need to manage and build your site can be found in the Main Menu.
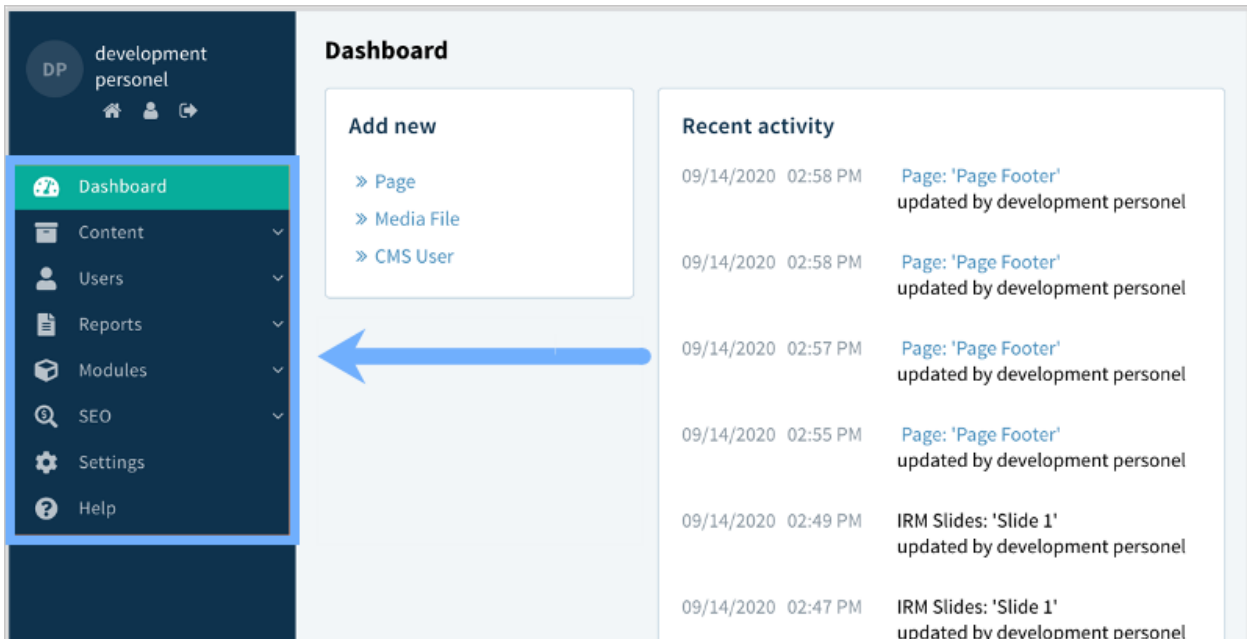
Within the menu, AccuCMS functions are categorized into the following modules:

- **Dashboard:** Provides quick access to the most frequently utilized functions of AccuCMS.
- **Content:** Allows you to manage your website's pages, navigation, media files, and templates.
- **Users:** Allows you to add and delete AccuCMS users or modify their permissions.
- **Reports:** Contains submissions received via your website's forms and site error reports generated by the system.
- **SEO:** Gives you access to add or modify your website's SEO settings including analytics & tags, 301 redirects, and schema markup.
- **Settings:** Allows you to view and/or update your website's basic settings including your favicon, shortcut icon, system email address, storage info, and site mode.
- **Help:** Provides contact information for our support line and an option to submit a support ticket directly from AccuCMS.
  - Our support team is available Monday - Friday from 9:00 a.m. until 4:00 p.m.
  - Email: support@bluearcher.com
  - Phone: 412.353.1050 (Press 1 for support)

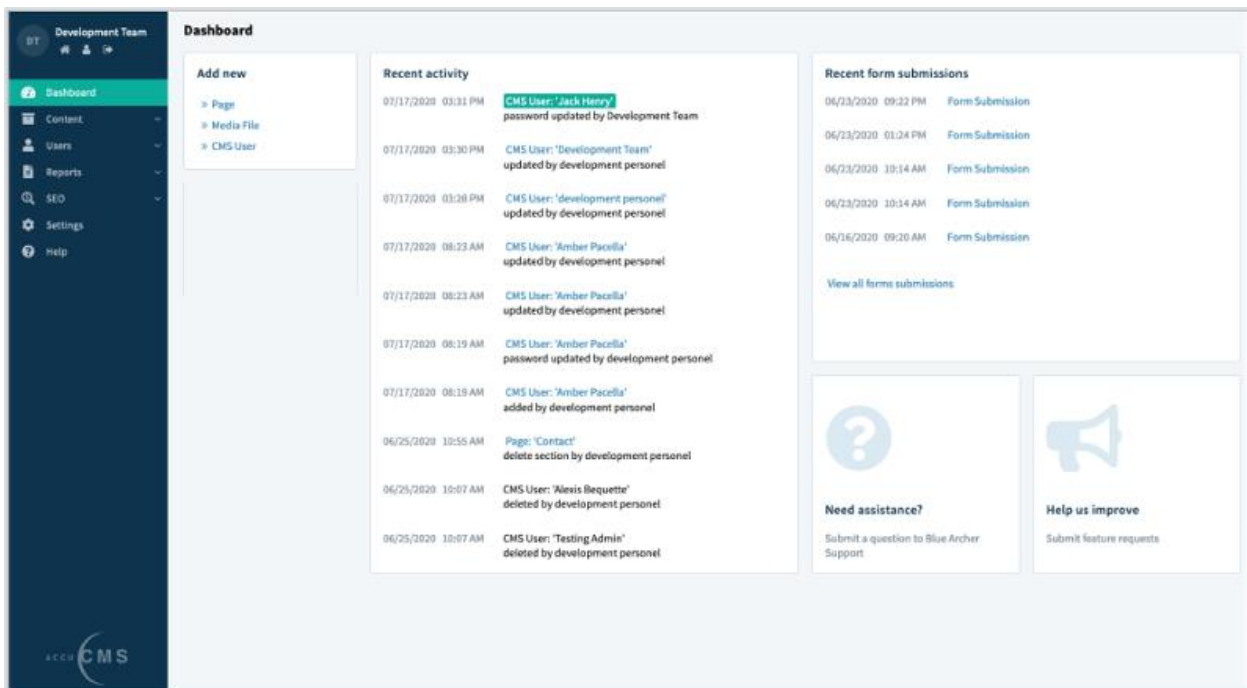# Accessing the Modules

To get started, click on the arrow next to appropriate tab in the Main Menu. Next, select the desired module from the drop-down menu.
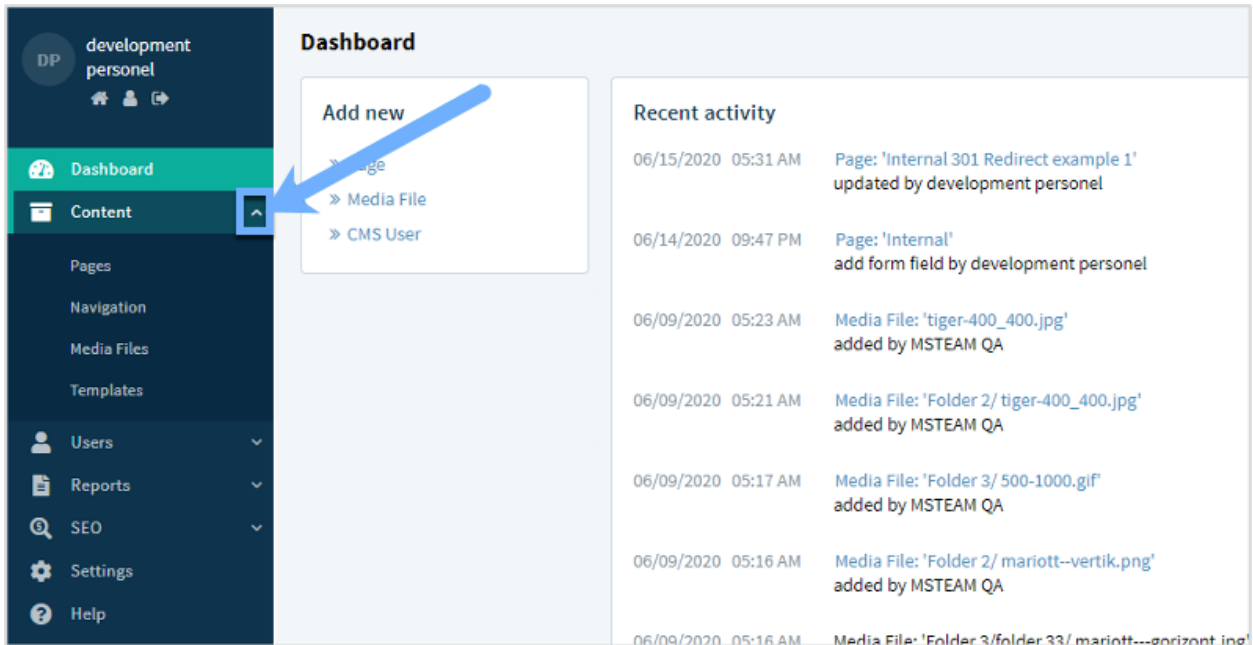
AccuCMS Dashboard

The dashboard is the default landing page when you log in to your site manager and provides quick access to the most frequently used functions of the AccuCMS.


The following functions and information appear on the dashboard:

- **"Add new"** enables you to:
  - Click "Page" to create a new page on your website
  - Click "Media File" to upload a new media file such as an image
  - Click "CMS User" to create a new CMS user
- **Storage used:** Displays the total amount of storage your website is using.
- **Recent activity:** Lists all recent changes made to your website.
- **Recent form submissions:** Shows all recent form submissions.
- **Need assistance?:** Directs you to the contact information for Blue Archer Support.
- **Help us improve:** Allows you to submit a suggestion to help us improve the AccuCMS.

Content

The Content section of the AccuCMS allows you to manage your website's pages, navigation, media files, and templates.
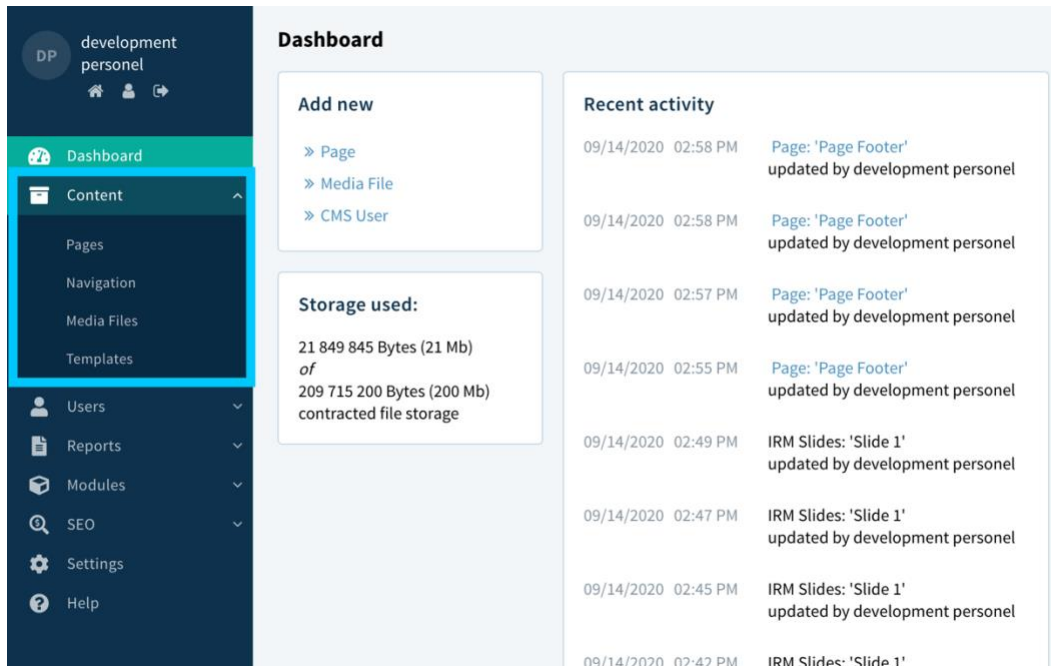
Pages

Most modifications to the website can be made using the "Pages" section of the AccuCMS.

Using the Pages module, you can:

- [Add/delete pages](#)
- [Edit/delete images on website pages](#)
- [Edit/delete forms](#)

To get started, click the arrow on the "Content" tab and then click the "Pages" subsection tab. You will be directed to a screen that lists all of your existing website pages.

Pages Dashboard

At the top of the window, you will see the following options:

- The **[Add New]** button redirects to a screen where you can begin creating a new page.
- The arrow beside the **[Publish] button** allows you to choose from three different options for publishing your existing pages:
  - **[All Pages]** will make all modifications live on the front-end of your website.
  - **[All 'Published' Pages]** will only publish pages that are already published.
  - **[All Selected Pages]** publishes pages that you have selected by checking the box next to the page name.
- The **Search Keyword** bar allows you to search for a specific page by entering a keyword.

Information about your website's pages is divided into the following columns:

- **Page Name:** Appears in the website's navigation bar on the front-end of the website.
- **Page URL:** The file name that becomes part of the page's URL.

- o Example: **www.bluearcher.com/about-us**
- **Template:** The template that was used to create the particular page.
    - o A template is a file containing a set of pre-designed formats for text and graphics. These formats can be applied to one or several pages.
    - o The template section of the website contains the HTML that determines the page's appearance.
- **Active?:** Indicates if the page is active or inactive.
    - o "**Yes**" means that the page is live and accessible on the front-end of your website.
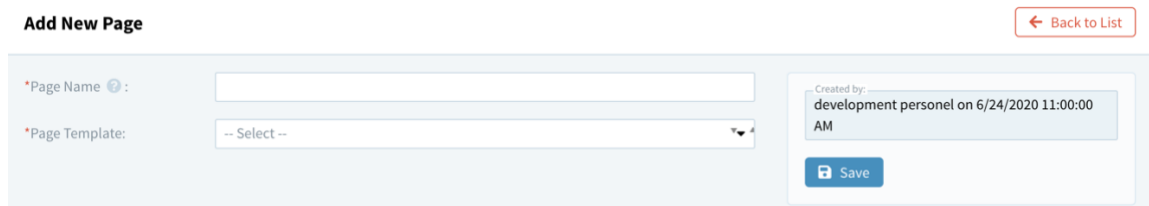   - o "**No**" means that the page exists only in the back-end of your AccuCMS and is not accessible by your website users or search engines.
- **Status:** Indicates if the page has been "Published" or "Modified".
    - o **Published:** All updates are live and visible on the front-end of the website.
    - o **Modified:** Internal changes have been made and saved but are not yet published to the front-end of the website.
- **Last Modified:** Displays when the most recent changes were made to the page and which CMS user made those changes.
- **Internal Notes:** This field allows you to enter a brief message about the page or notes for your team.
    - o This text is for internal use and will not display on the front-end of your website.
- **Action Icons:** The three final columns display icons for common actions when working in the Pages module.
    - o The icon will take you to the screen to edit the selected page.
    - o The icon allows you to preview the page without editing.
    - o The icon will delete the page.
        - Tip: Be cautious when using this function. Deleted pages can only be recovered by submitting a request to Blue Archer Support and reverting to a previous version of the website.

Creating a Page

To create a new page:

1. Click the [Add New] button. You will be taken to a screen with the title "**Add New Page**."

2. **Page Name:** Enter the name that will appear in your website's navigation.
3. **Page Template:** Select a template from the "Page Template" dropdown.

- Each template serves as a layout for your pages. For example, your homepage uses the "home" template, and an internal page uses the "internal" template.
4. Click the **[Save]** button.
5. You will then be redirected to a page titled "Edit Page" to begin adding content to your page.

Saving & Publishing a Page

When creating or editing a page, you have the option to copy, preview, or publish your changes or delete, cancel, or save your changes.
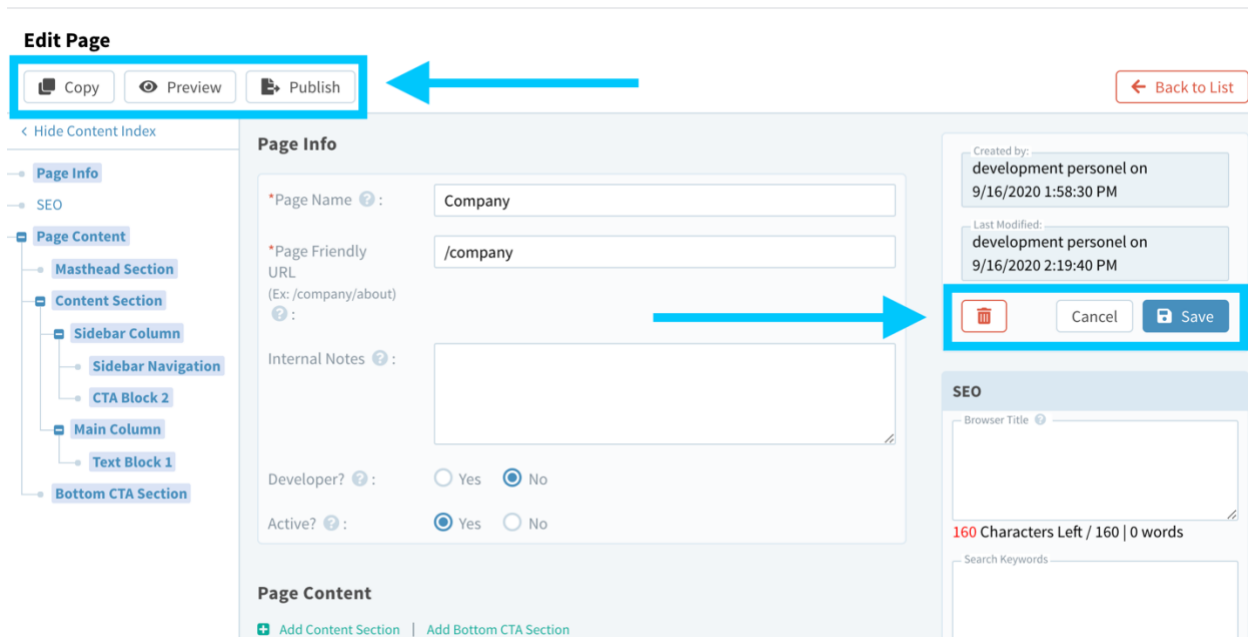
Components of a Page

Content Index

The Content Index is located on the left-hand side of the "Edit Page" screen.
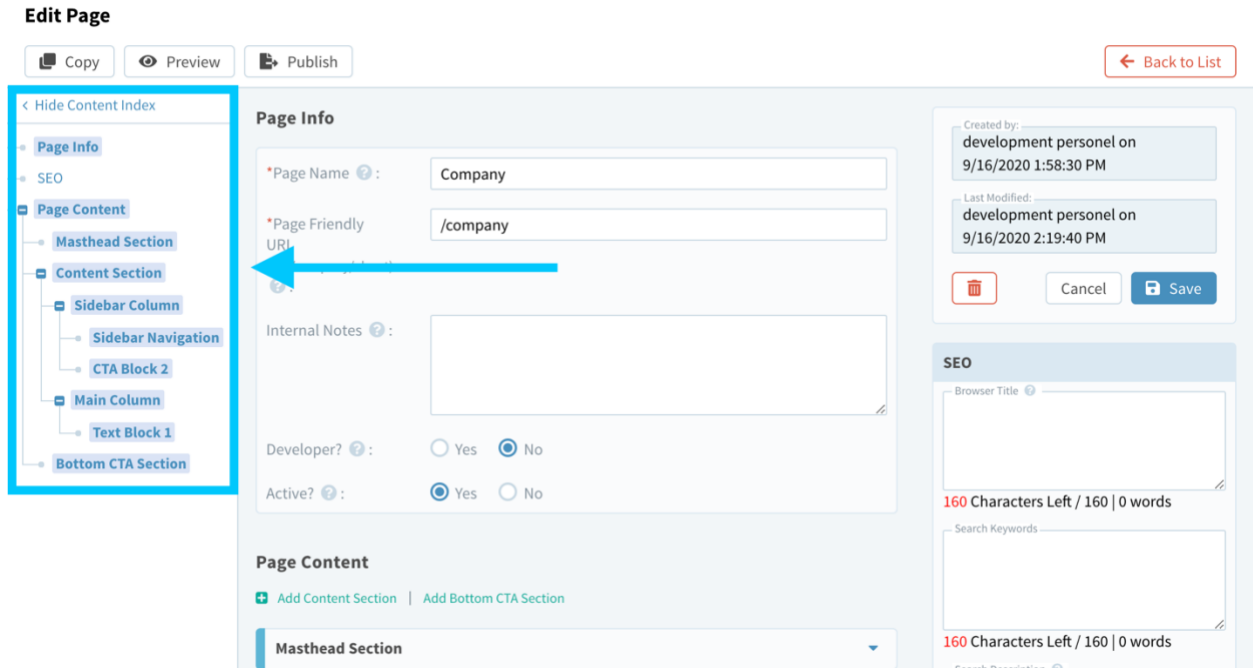
This tool allows you to quickly access a specific section of content. To access a specific section, click the content section name that appears in the index.

- Example: You could click "Main Content Section" or "Main Column" in the image below to jump to those areas of the page.

To hide the Content Index, click the arrow beside "Hide Content Index."

SEO Options

The page's SEO (Search Engine Optimization) content is located on the right-hand side of the "Edit Page" screen.

This section allows you to enter information that will help increases the likeliness that this page will appear in search engines. The SEO content fields are as follows:
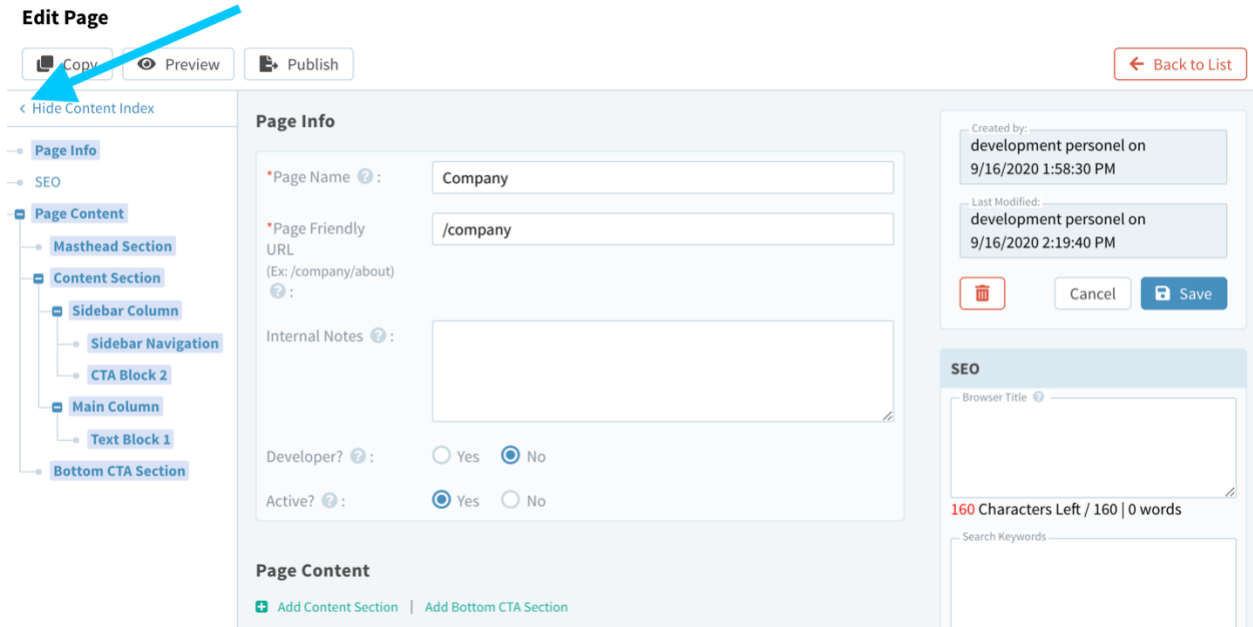
- **Browser Title:** Appears at the top of the browser. Keep this relevant and try to avoid using ONLY the company's name.
  - Example: You could use "Keyword | Company Name"
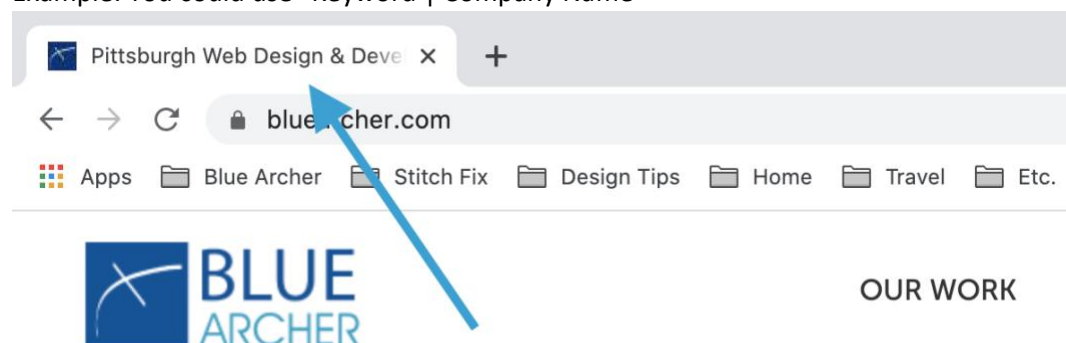
- **Search Keywords:** Words and phrases users would type into a search engine to find your website.
  - For example: If you are a bakery, you may include "cakes", "dessert", or "cupcakes."
  - Please limit this to 2-3 keywords since this is not as relevant in SEO as it previously was. Please note, search engines will penalize websites for "keyword stuffing."

- **Keyword Stuffing**: Refers to the practice of loading a webpage with keywords or numbers in an attempt to manipulate a site's ranking in search engine search results.
- **Search Description:** A description of the page that appears when the website pulls up on Google or any other search engine.
    - Include a 1-2 sentence description of the page. Be sure to keep it short and relevant.

Page Info

The Page Info section is where you can adjust the basic settings of the page.

- **Page Name** & **Page Friendly URL:** These fields have been automatically populated based on the information added on the "Add New Page" pop-up.
    - If you would like to change your Page Name or Friendly URL, you can do so by entering the new name or URL in those fields.
    - Remember, the entered information appears after your domain name in your URL and cannot contain any spaces or special characters. (Example: www.bluearcher.com/**about-us**).
    - For SEO purposes, it is best to use only lowercase letters.
- **Internal Notes:** This field allows you to enter a brief message about the page or notes for your team. This text is for internal use and will not display on the front-end of your website.
- **Developer?:** If you are set as a developer under your CMS user settings, you will see this field. By selecting "yes", you can ensure that this page cannot be deleted by a user or admin.
- **Active?:** Selecting **"Yes"** will make this page live and accessible on the front-end of your website. Selecting **"No"** determines that the page exists only in the AccuCMS and is not accessible on the front-end of your website.

Page Content
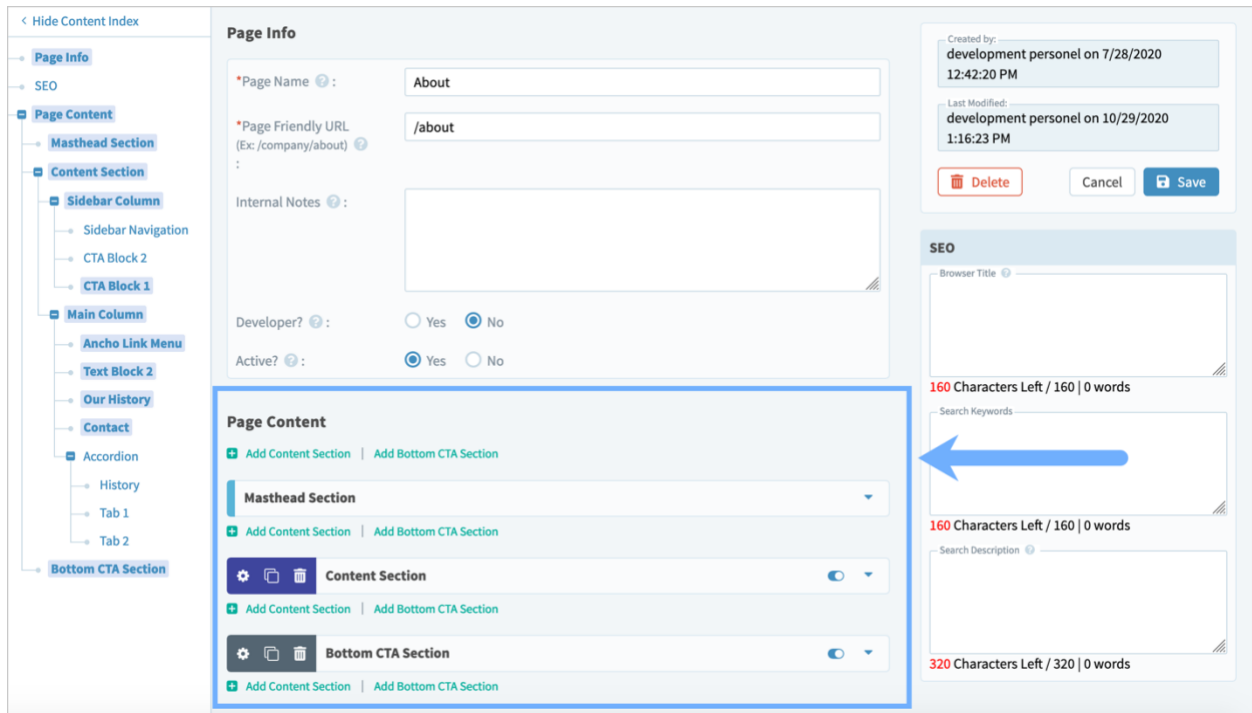
The Page Content section is where you add the content (text, images, forms) that you want to appear on your page.

CONTENT SECTIONS

First, you will select a content section to add. There are three primary sections types that can be included in each page:

- **Masthead Section:** The top portion of your page design that includes the page's main header, large background image, and introductory text.

- **Main Content Section:** Where you will add the majority of your content. This content will go below your Masthead Content and above your Bottom CTA.

- **Bottom CTA:** The large call-to-action that typically appears before your website's footer.
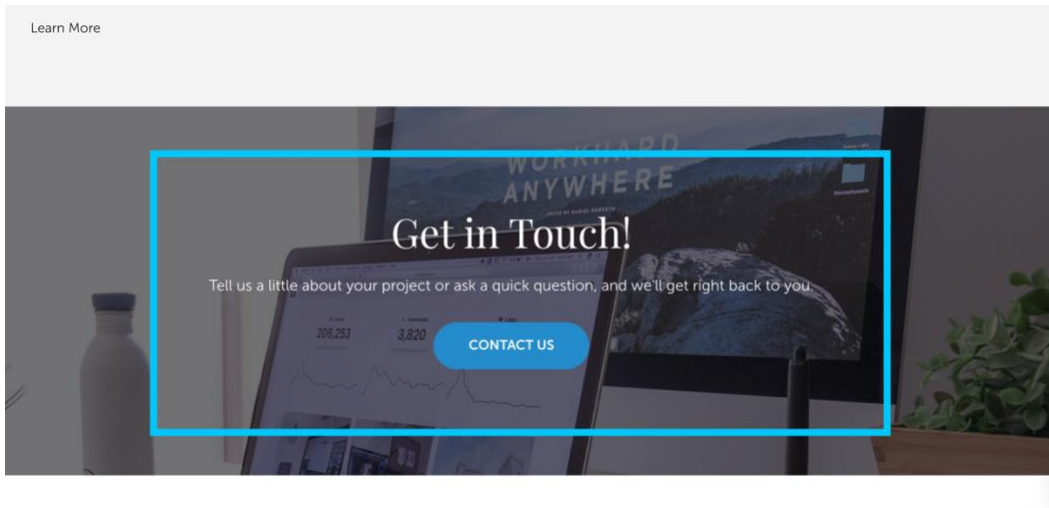
Content Section Rules

You can add different sections to your page to fit your content. You have the ability to add as many sections of content as you would like as long as you adhere to the following section rules:

1. A Main Content Section or Bottom CTA Section cannot be added before the Masthead Section.
2. A Bottom CTA cannot be added before the Main Content Section.
3. Only one Form can be added per section.
4. Only one Sidebar Navigation can be added per section.

If you break any of these rules, a message stating "Cannot add this section" will appear.

ADDING A NEW CONTENT SECTION

To add a new section:

1. Click on one of the three section links (Add Masthead Section, Add Main Content Section or Add Bottom CTA Section) to begin creating your section:
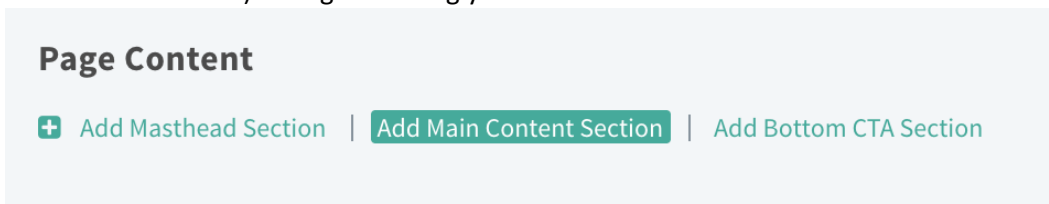
2. Next, a pop-up window will open where you will enter the following information:

- **Name:** You can give your section a custom name you will recognize or leave it as is.
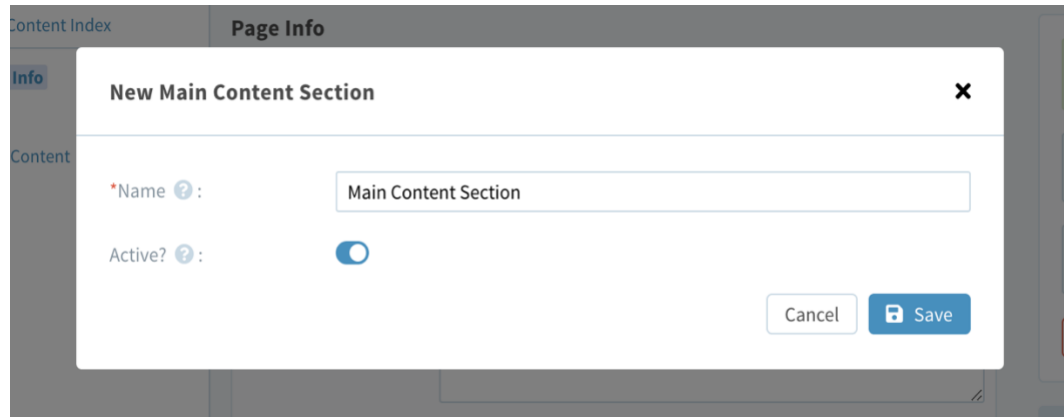
- **Active:** If you want your new section to be active, leave the toggle as is. Inactive sections will not be visible on the front-end of your website.
- Click [Save].
- Your new section will appear under "Page Content."
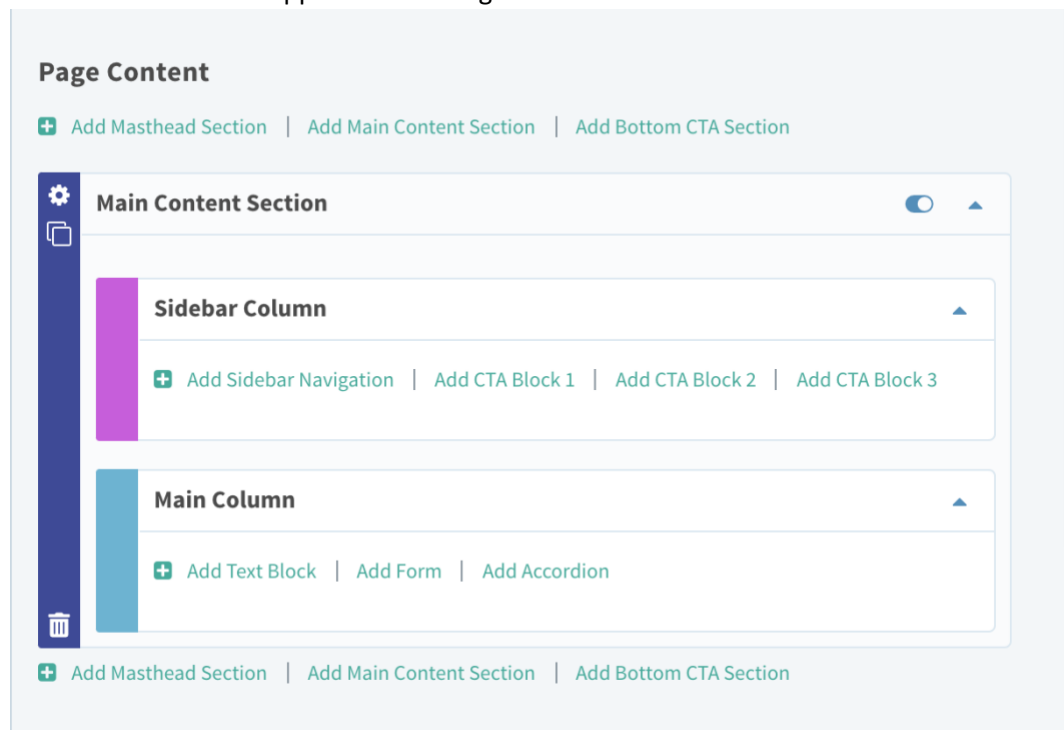
- To add another section of content, click a link from the set that appears below the existing section (pictured below).
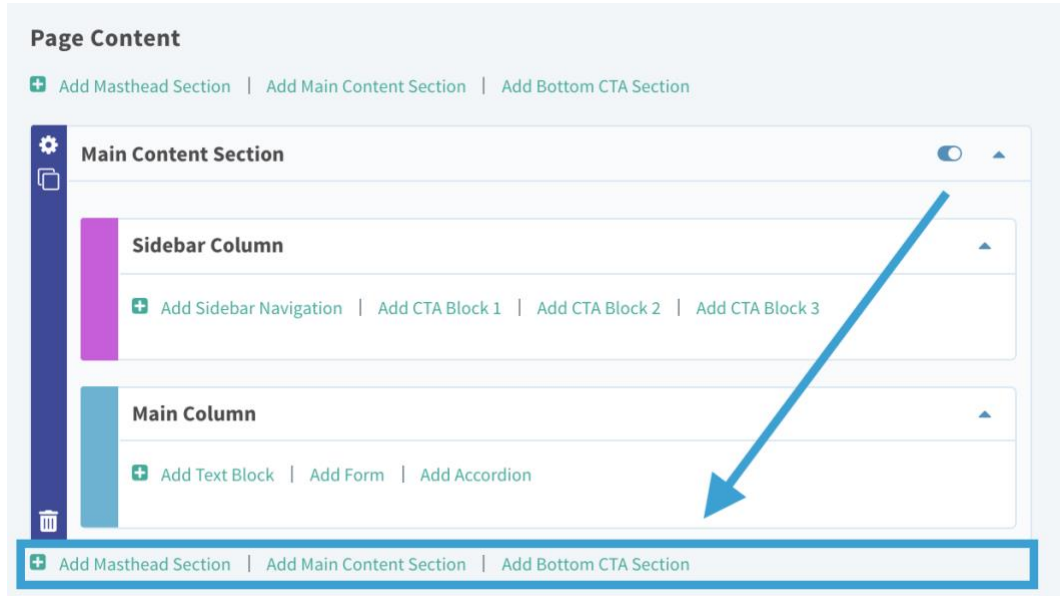
CONTENT SECTION SETTINGS

You have the following options when working in your content sections:

1. The ⚙ icon allows you to edit your section settings.

2. The ▢ icon allows you to create a copy of your section.

3. The 🗑 icon will delete your section.

4. The ⬤ toggle bar allows you to turn a section on or off. Only sections that are set to "on" will be visible on the front-end of your website.

ADDING A CONTENT SUBSECTION

Within the **Main Content Section**, you have the option to add two **Subsections.** To access these subsections, click the small arrow icon to expand the "Main Content Section" block
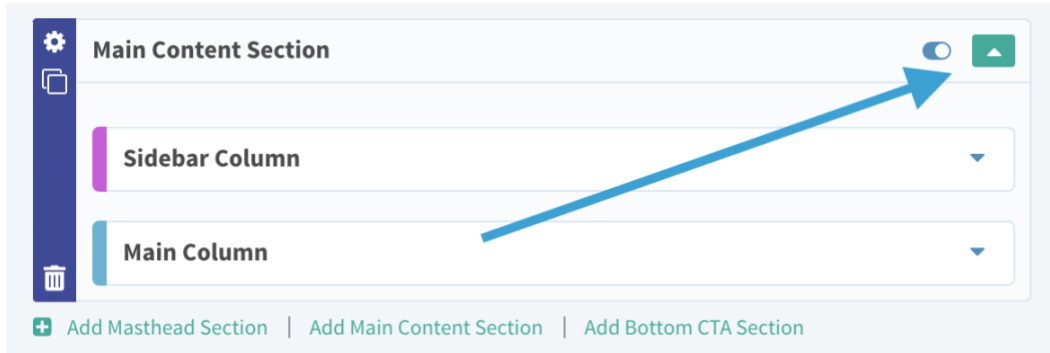
The two subsections are:

1. **Sidebar Column:** Content that appears in a column alongside your main content.
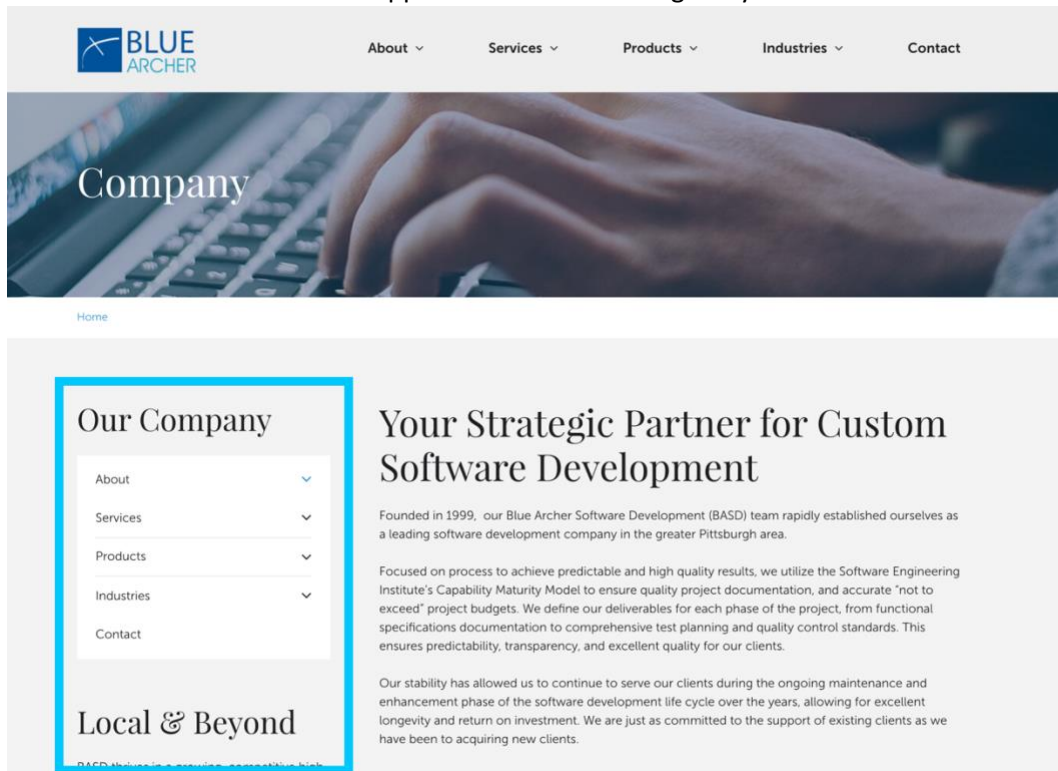
2. **Main Column:** Contains the primary, or most important and relevant content on your page.
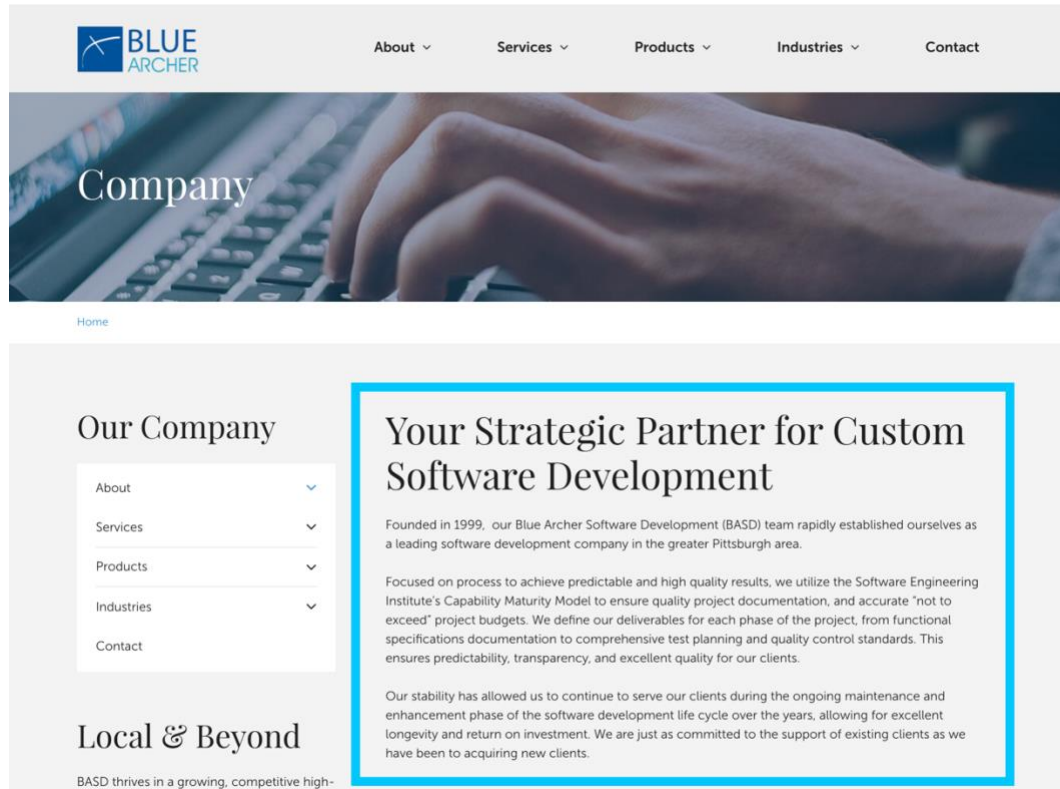
To begin building your subsection:

1. Click the desired page element such as: Add Text Block, Add Form, Add Sidebar Navigation, etc.
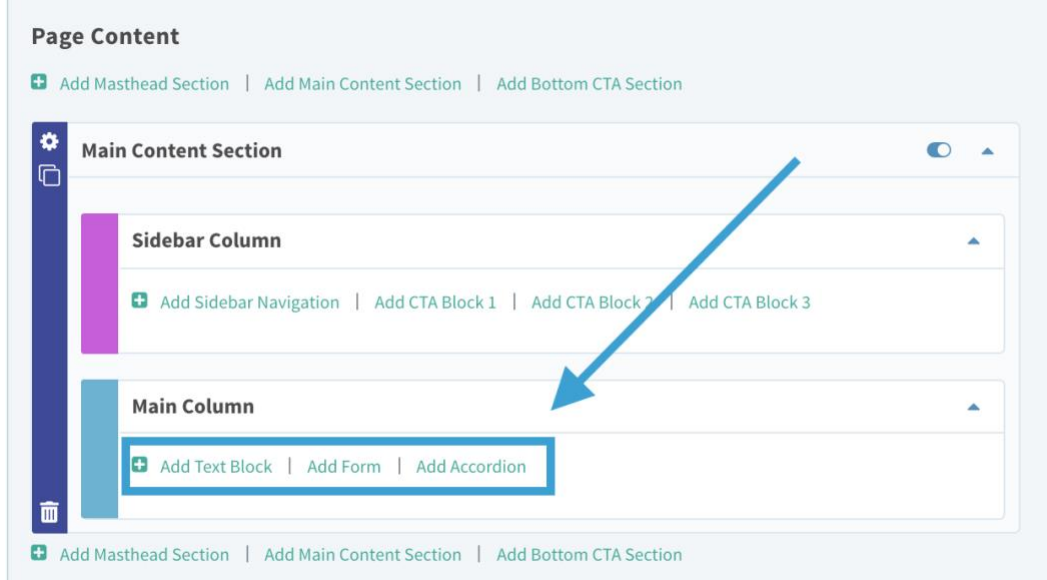
2. Next, fill in the fields with the information you would like to add to your page.

FIELD TYPES: HOW TO ADD HEADINGS, IMAGES, AND BODY COPY

There are three types of fields to focus on when building your content sections: **header fields**, **image fields**, and **RTE**.

Headers

In the content sections, you have the option to add headers. **Headers** are the largest text that appear on the page and can act as the main title of the entire page and/or the main title of a section within the page.
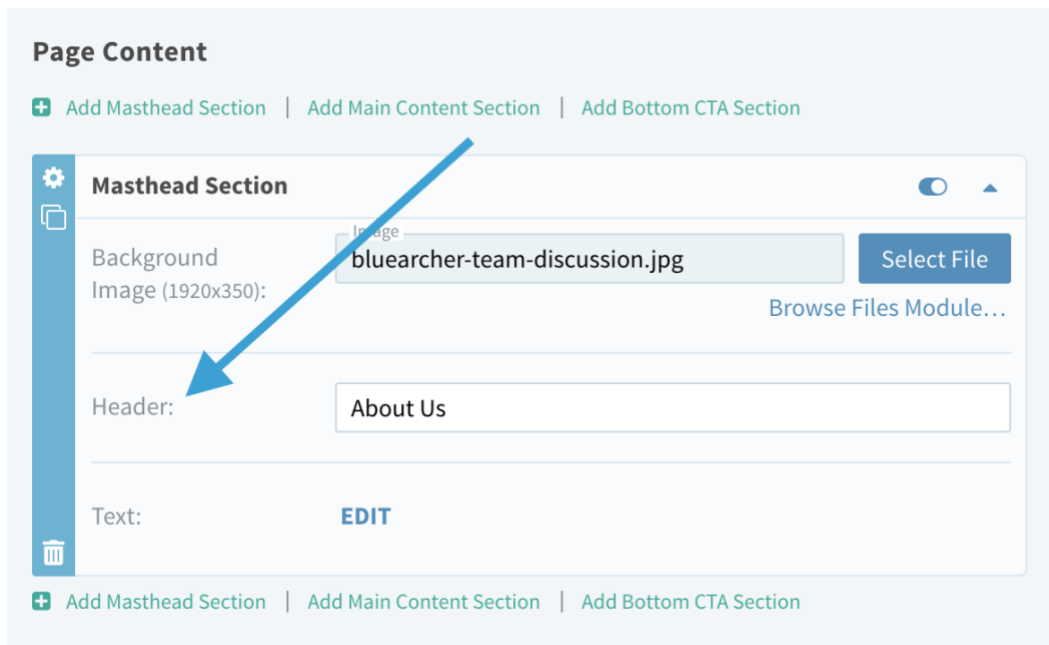
An example of a header field in the CMS
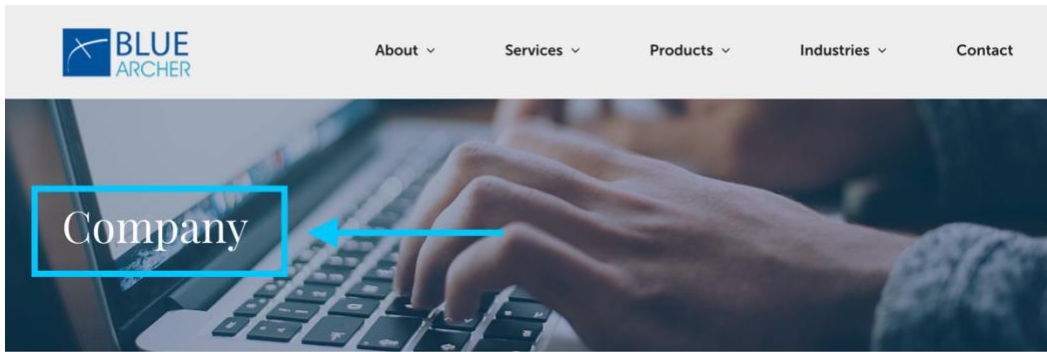
An example of a header on a webpage (highlighted in blue)

Images

When working in your content sections, you also have the option to add images to your page via the **Image Fields.**
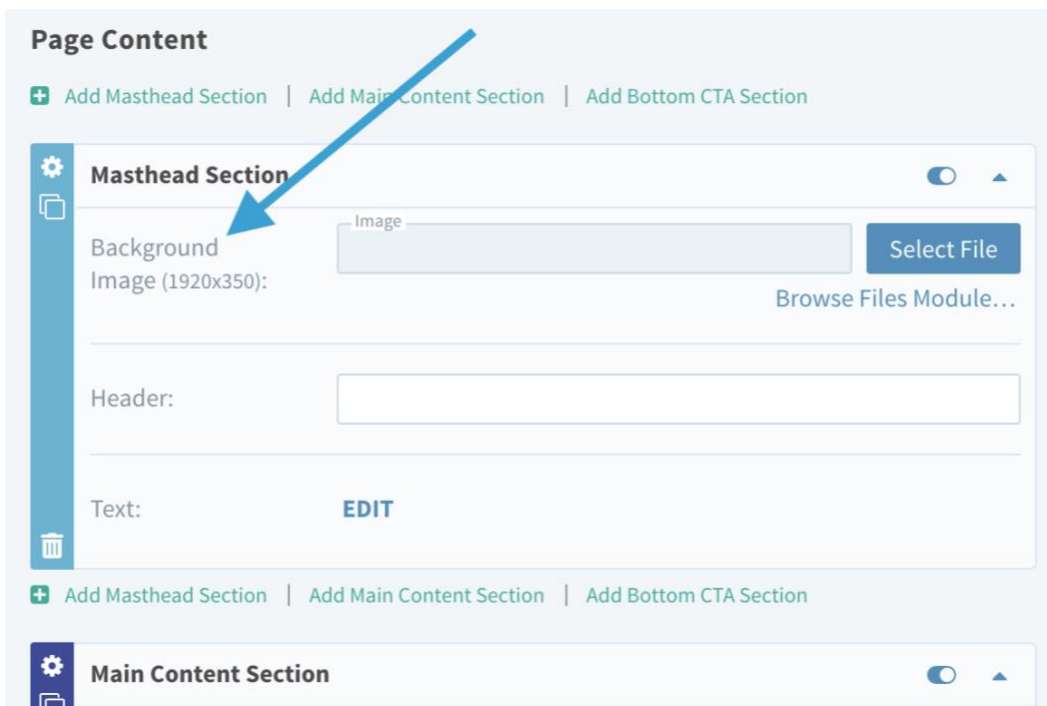
An example of an image field with a required preset size

1. To upload an image directly from your desktop:

- Click the [Select File] button
- Locate & select the desired image from your computer

2. Alternatively, you can click the "Browse Files Module" link to select a file from your Media Files module.
   - Note: Some image fields will require a preset size, in which case you will see the width in pixels. These dimensions will be listed under the image title.
   - Do not forget to format your images before uploading them to an Image Field.
   - To compress your images and help with your page load speeds, use a website like Tinypng.com

Image Options

When working within a text block, you have the following image options:

1. **Align Images:** Select an option from the "Alignment" dropdown to position your image:
   - Left of your text
   - Right of your text
   - Centered within your content
   - Stretched to the window width
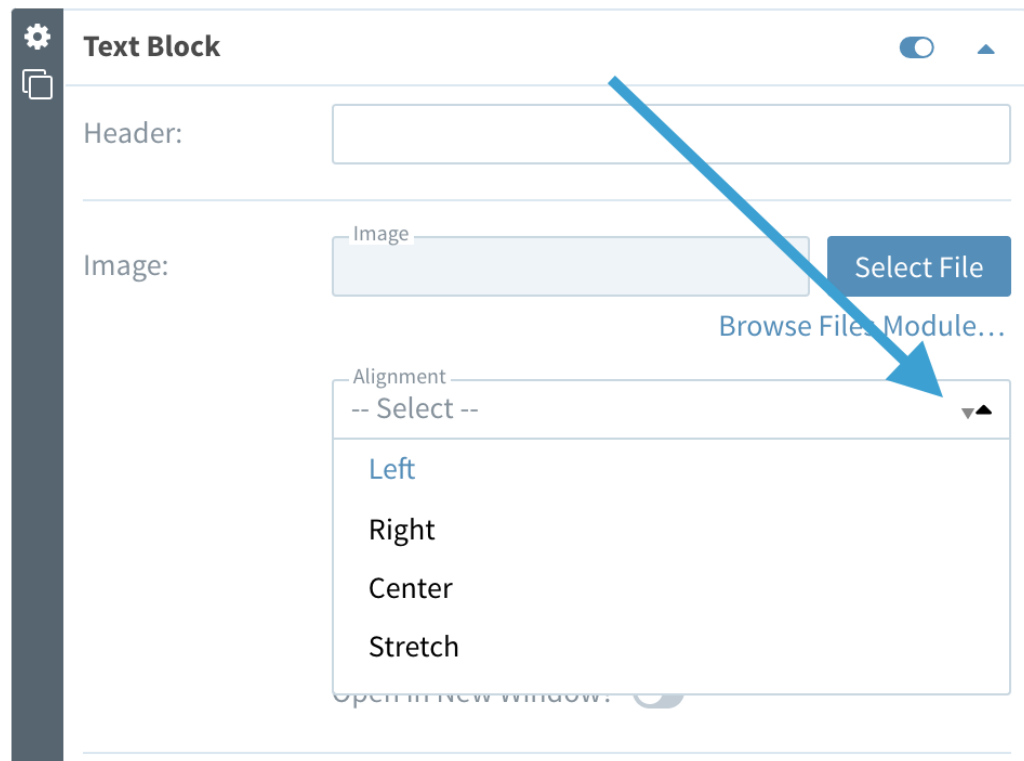
2. **Alt Tag:** Alt tags are helpful for individuals who view pages in text-only mode.
   - Alt Tags can also increase your page's chances of being indexed by search engines.
   - To create an Alt Tag, enter a brief description of the image in the "Alt" field.

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3. **Link URL:** Links the image to information related to the image. To add a Link URL, simply enter the URL for the page you would like to link to. (Example: www.bluearcher.com).
   - If you are linking to a page outside of your website, toggle "Open in New Window" to **"yes"** so that the new page opens in a separate window.

Body Copy

When working in your content sections, you also have the option body copy. Read on to learn how to add, edit and format this copy using the RTE.

RICH TEXT EDITOR (RTE): FORMATTING YOUR TEXT

The Rich Text Editor (RTE) allows content, images, links, and other items to be added to the webpage with ease. This is where you will add the majority of the text you want to have appear on your page.

1. To access an RTE field, click the **EDIT** button within a content section.

2. This will open a window where you will enter your text.

When working in your RTE Field, you have the following options:

Adjust Workspace

Maximize RTE Field: Click the "maximize" icon to expand your view of the RTE Field and widen your work area.
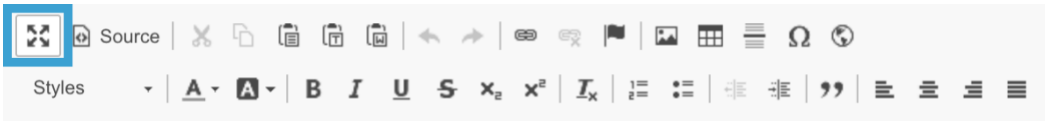
View RTE HTML

View Source: Click the [Source] button to view or edit the page's HTML. Only utilize this option if you are comfortable working directly with HTML code.
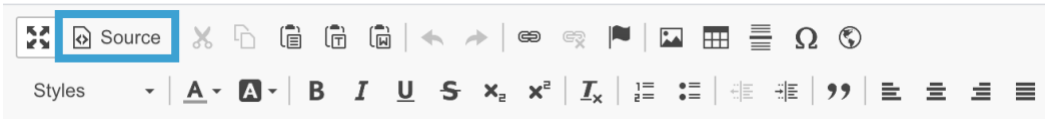
Cut, Copy & Paste Text

Cut Text: Highlight your text then click the scissors icon to cut (remove) text.
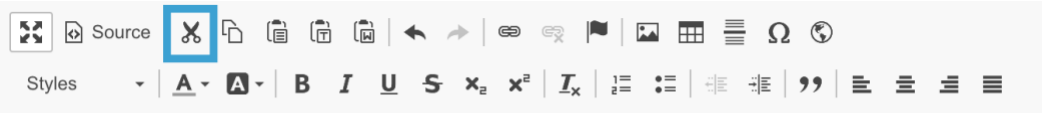
This is sample copy for your RTE field.

Copy Text: Highlight your text then click the copy icon to copy the selected text.
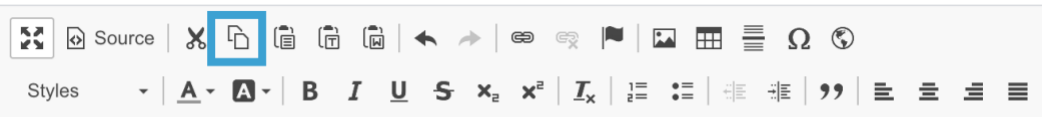
This is sample copy for your RTE field.

Paste Text: Click the "paste" icon to paste text that has been cut or copied from elsewhere.
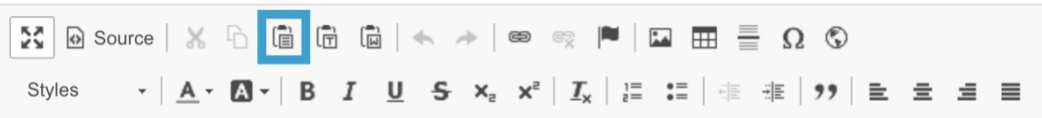
Paste as Plain Text: Click the "paste as plain text" icon to paste text as plain text (text with all formatting removed).
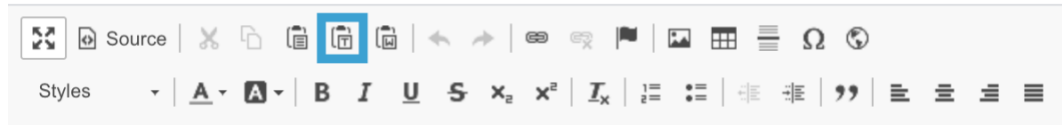
Paste from Word: Use the "Paste from Word" icon to strip the text of its Word formatting.
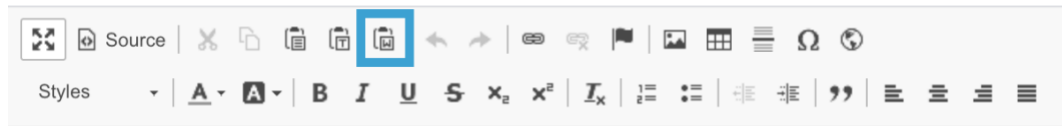
Undo/Redo Changes

Undo/Redo: Click the "undo" or "redo" arrows to undo or redo changes.
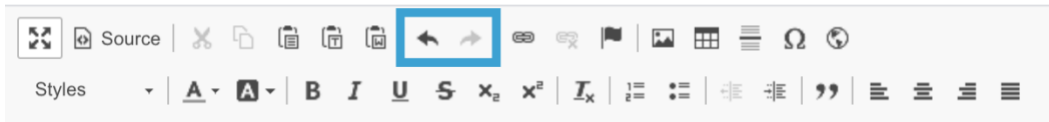
Creating Links

When working in an RTE field, you have the option to link an item to an internal or external webpage or file.

To create a link:

1. Highlight the text you would like to make into a link.
2. Click the icon that looks like a chain link.
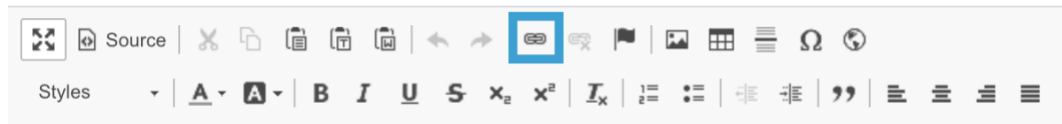
3. In the "Link" pop-up window, make sure:
   - The **Link Type** is set to "URL"
   - The **Protocol** is set to: Http://
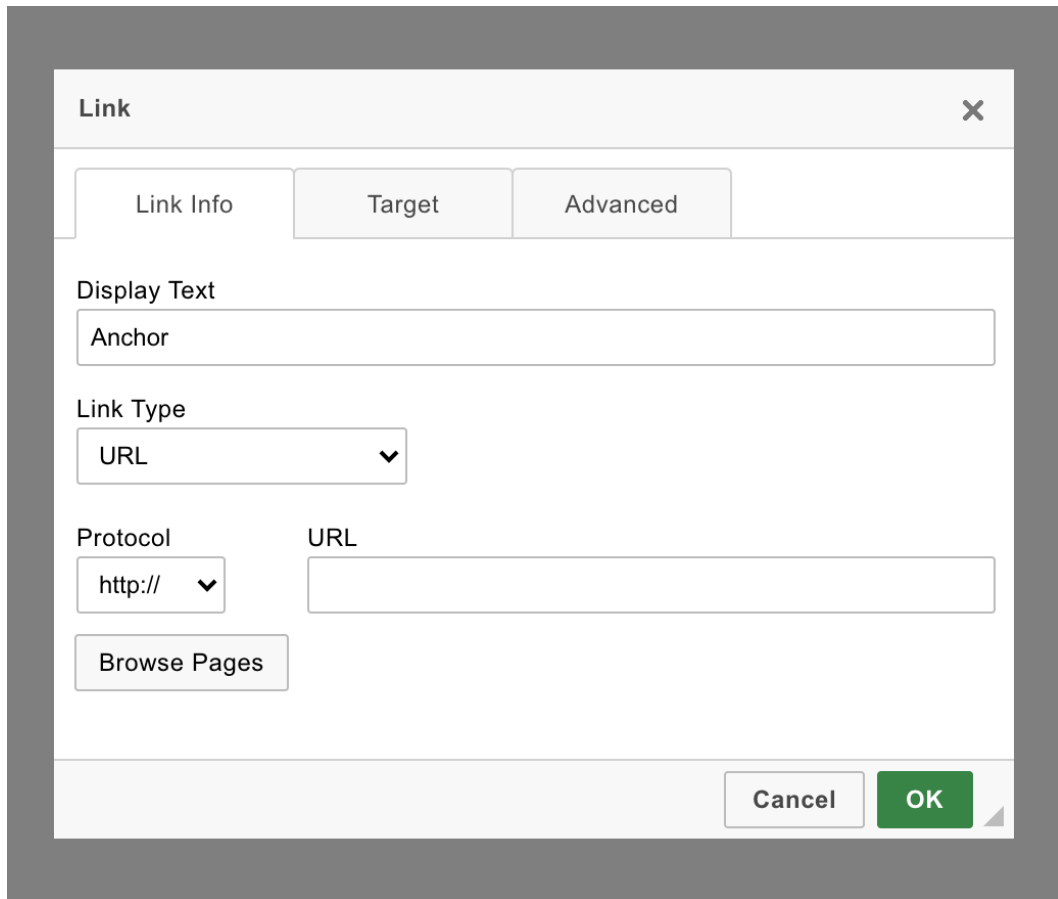
4. URL: Enter the URL for the page you are linking to.
   - **External Links:** For external links (a link that takes the user off of your website), use the entire URL.
   - **Internal Links:** If you are using an internal link (a link that takes the user to a page on your website):
     - o Click the **[Browse Pages]** button
     - o Click on the desired page
       - o Click the **[Insert]** button

5. Click the "Target" tab at the top of the popup window to select how the page will open. You can choose from the following options:
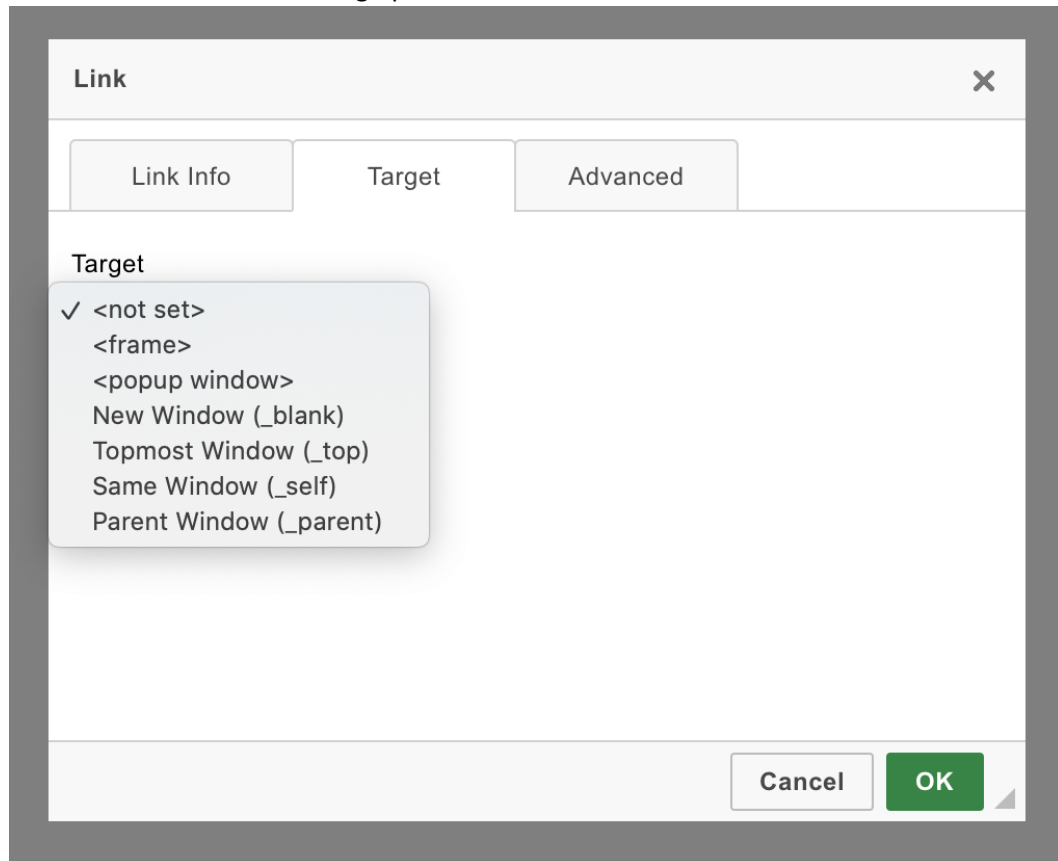
- **Frame:** This feature is not commonly used. However, if you do have a frame, this will open the link up within the frame.
- **Pop-up window:** This will open a new window for the browser and pop-up in front of the page the user is currently viewing.
- **New window:** This will open in a new browser window.
- **Topmost window:** This opens the link in the full body of the frame. Again, frames are not common or recommended, but are available if needed.
- **Same window:** This will open the page in the window the user is currently viewing.
  - o Tip: For most links, you will select with "new window" or "same window"
- **Parent window:** This opens the window in the parent, or main page, of the frame.

6. Click [Ok].

Adding Anchors

Anchor text refers to a link that points to another part of the page. This is great for an FAQ section, for example. To create anchors:

1. Enter the text that you would like to be the target of the link.
   - For example, let's say that this is the answer portion of an FAQ.

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2. Place your cursor in front of the answer text then click the anchor icon to create an anchor.

3. In the "Anchor Properties" window, enter a name for the anchor.
4. Click [Ok].
5. Next, type the content that will server as the link.
   - In this example, this would be the question portion of the FAQ.
6. Highlight the text and click the link icon that was mentioned earlier.
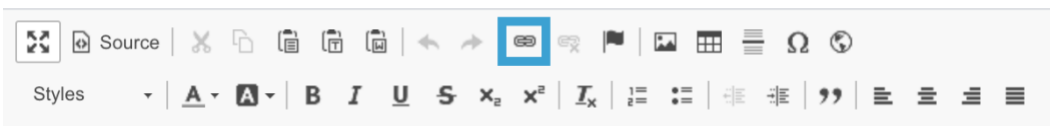
7. Under "Link Type" select "Link to anchor in the text".
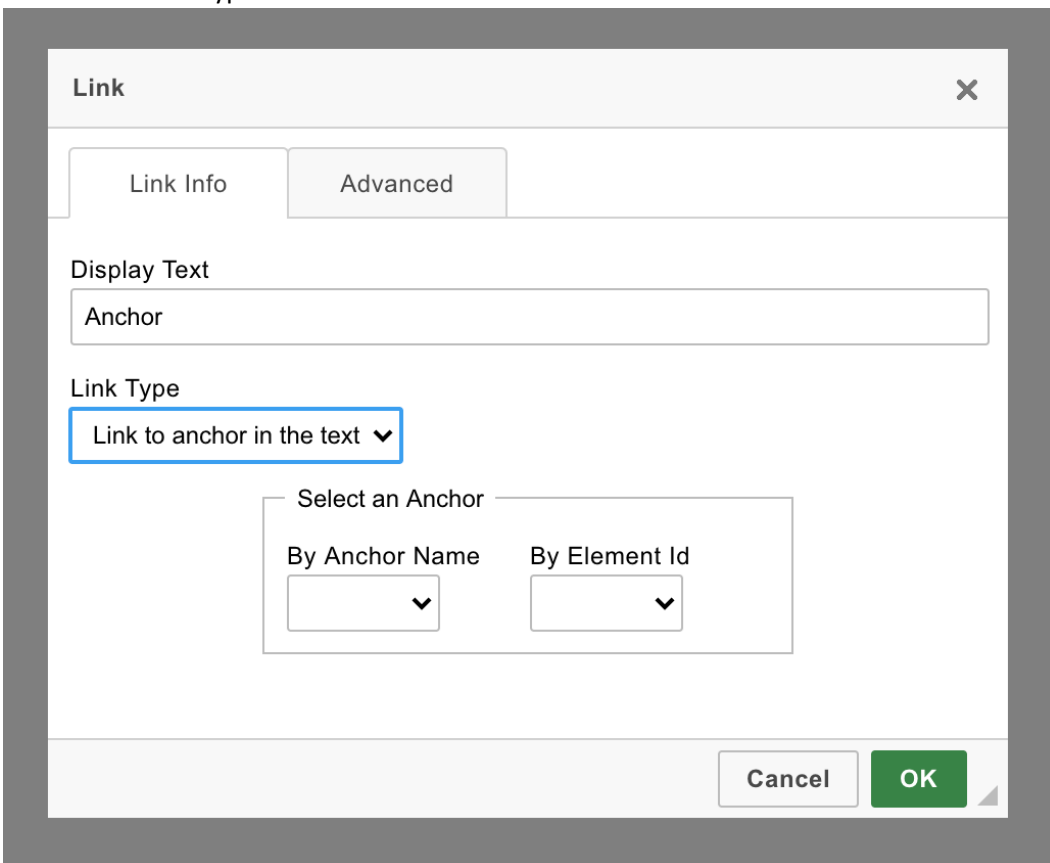
7. In the drop-down under **"By Anchor Name,"** select the anchor you created.
8. Click [OK].

Adding Content Images

You also have the option to add images to your content within your RTE Fields. To add an image:

1. Place the cursor where you would like to insert the image relative to your text.
2. Click the image icon in the RTE tool bar.
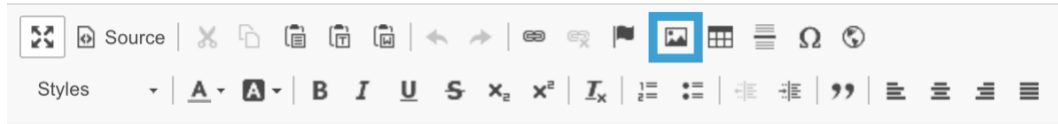
3. A new pop-up window will open prompting you to enter the URL of the file or the file path in AccuCMS.
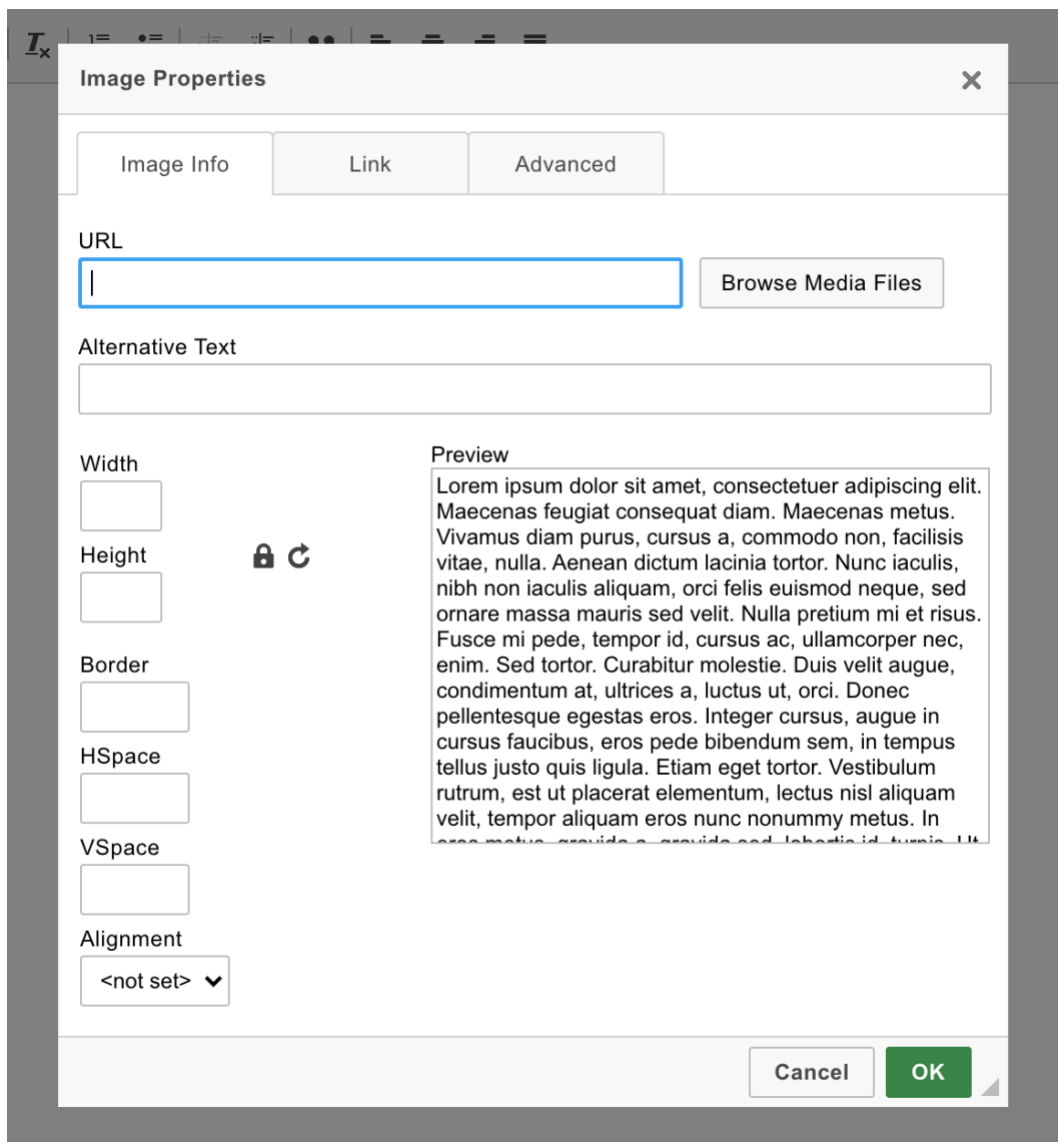
Note: In order to insert an image into your RTE field, it must first be added to your Media Files Module.

4. Click [Browse Media File].
5. Select one of the following:
   - An existing image in your Media Files
   - **Or** drag and drop an image into the Media Files Module using the "Drag & drop files here" window
6. **Alternative Text:** Alt Tags are helpful for individuals who view pages in text-only mode. Alt Tags can also increase the page's chances of being indexed by search engines.
   - To create an Alt Tag, enter a brief description of the image in 'Alternative Text' field.
7. **Height & Width:** Delete the numbers from the 'Height & Width' field.
   - This will ensure mobile friendly images.
   - Please resize all images before uploading them to the CMS using a tool such as Adobe Photoshop or Microsoft Paint.
8. **Padding:** Add pixels to the "Border", "Hspace" or "Vspace" fields to add padding around the text and image.
9. **Alignment:** Under the [Alignment] dropdown, select align 'left' or 'right' to position images relative to your text.
10. **Link:** If you would also like the image to serve as a hyperlink, click the 'Link' tab and enter the desired URL into the "Link URL" field. Follow the link rules outlined above.
11. **Target:** Select how you would like the link to open from the "Target" drop-down.
12. Click [OK].

Creating a Table

Please note: You should only use tables for data when necessary, since they are not responsive. Please **DO NOT** try to create columns using a table. If you do need a table, please contact Blue Archer Support.

1. Click the table icon.
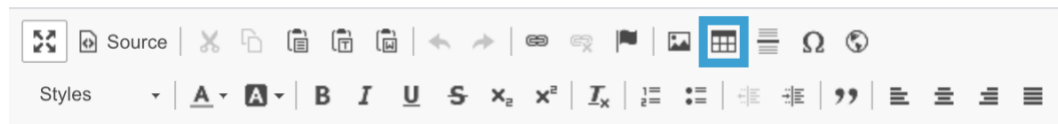
2. Select how many rows and columns you will need.
3. Determine the maximum height and width. This will prevent the box from stretching or appearing distorted.
4. Select whether or not you want a header to appear in one of the rows.
5. Cell spacing refers to how far apart each box of the table will be spaced.
   a. You can keep this as a default.
6. Cell padding refers to how thick the lines between each cell is.
   a. You can keep this as the default.
7. Select the boarder size if you want a frame around the box.
8. Select the alignment to determine where you would like the box.

a. Left
b. Center
c. Right
9. Add a caption or summary if desired.

Horizontal Line

A horizontal line, ideal for dividing up text, can be inserted using the horizontal line icon on the RTE toolbar.
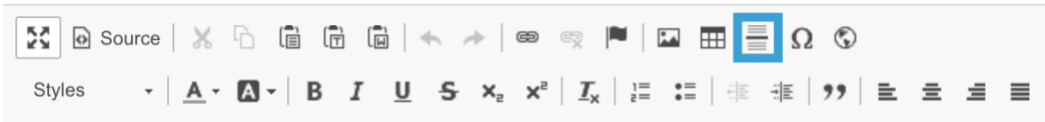
Special Characters

The special character icon allows a CMS-user to add items that are not readily available on their keyboard. You may find characters such as the "Trade Mark" or "Copy Right" symbol, as well as many others.
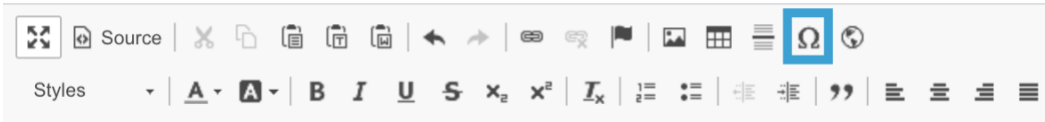
iFrames

The Iframe option can be used to embed a video on your page.
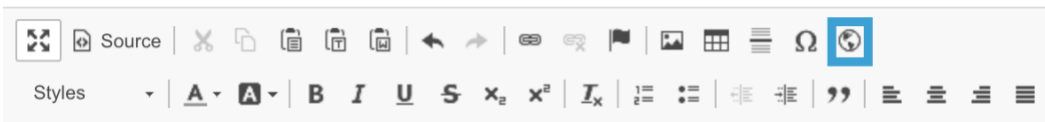
To embed a video:

1. Click the embed icon.
2. Enter the video's YouTube URL
3. Enter your desired width, height and alignment for the video
4. Click [Ok].

Styling Text

You have the option to add different formats to the content within the RTE field. Please keep in mind that brand-specific fonts and styles were determined by your designer at the start of the project. You do not need to select the font each time; it will be applied automatically.

Styles

There are multiple options when selecting a style for your text. To select a style, click the "Styles" drop-down.
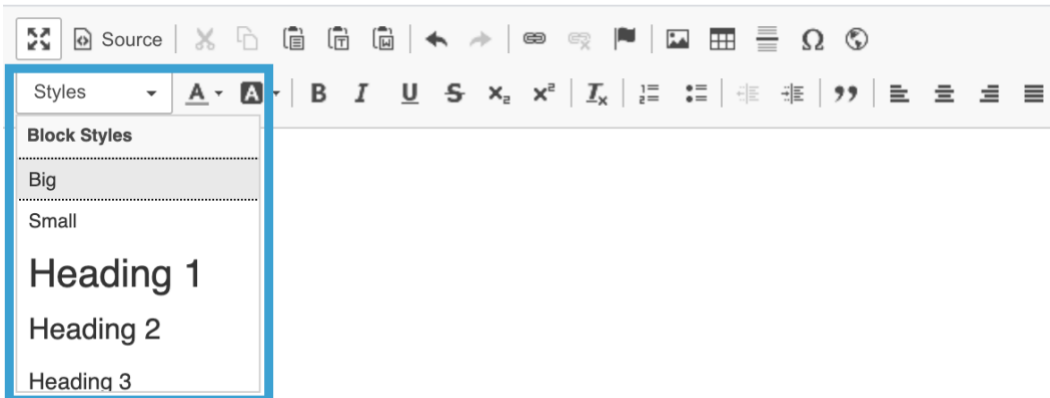
- **Paragraph:** This refers to standard paragraph text.
- **Big:** A slightly larger version of your paragraph text.
- **Small:** A slightly smaller version of your paragraph text.
- **Heading 1:** The largest text on the page, typically the page title. Since a header field is provided in the CMS, you will not need to use the [Heading 1] option often.
- **Heading 2:** The most common and second largest heading on the page.
- **Heading 3-6:** The headings will decrease in size as they increase in number. Header 3 is larger than heading 4 which is larger than heading 5, and so on.

Formatting Options

Your formatting options when working in your RTE Field include:
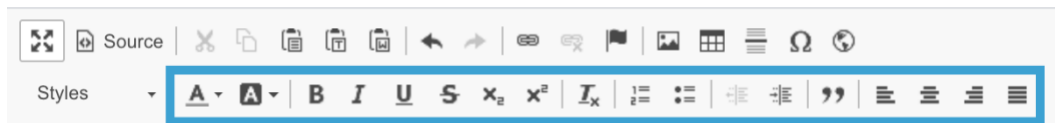
- Font color
- Highlight color
- Bold
- Italic
- Underline
- Strike

- Subscript
- Superscript
- Indent left or right
- Remove format: highlight the desired text and click this icon to remove any existing formatting
- Numbered list
- Bulleted list
- Block quote: highlight the desired text and click this icon to format the content as a prominent quote.
- Align text left, center, right or justified.

Bulleted and Numbered Lists

The image below displays a numbered list and a bulleted list.
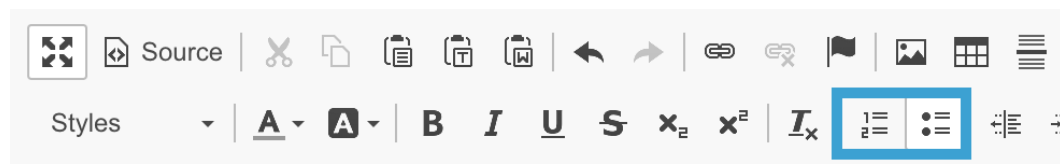
To create a bulleted or numbered list:

1. Select the bulleted or numbered list icon.
2. Begin typing your list.
3. Use the [Enter/Return] key on your keyboard to create a new bullet or number for each item.
4. Use the [Tab] key on your keyboard or the indent icon to add sub items to the list.

Creating a Form

Online forms are a standard feature of websites. This is an excellent feature for acquiring leads and customer information.

Warning: Please do not collect sensitive information through your form. This includes credit card information or social security numbers. If you need these options, please contact Blue Archer Support.

A form can be added to your page under the "Main Content" section.

To add a form:

1. Under Page Content, click "**Add Main Content Section.**"
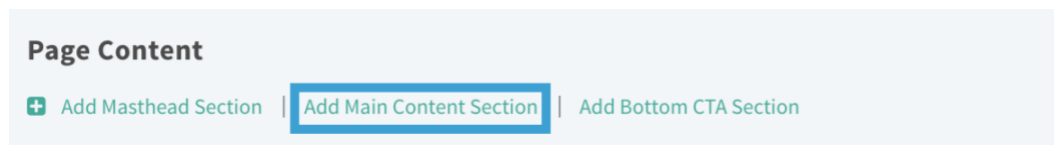
2. Click the down arrow next to **"Main Content Section."**
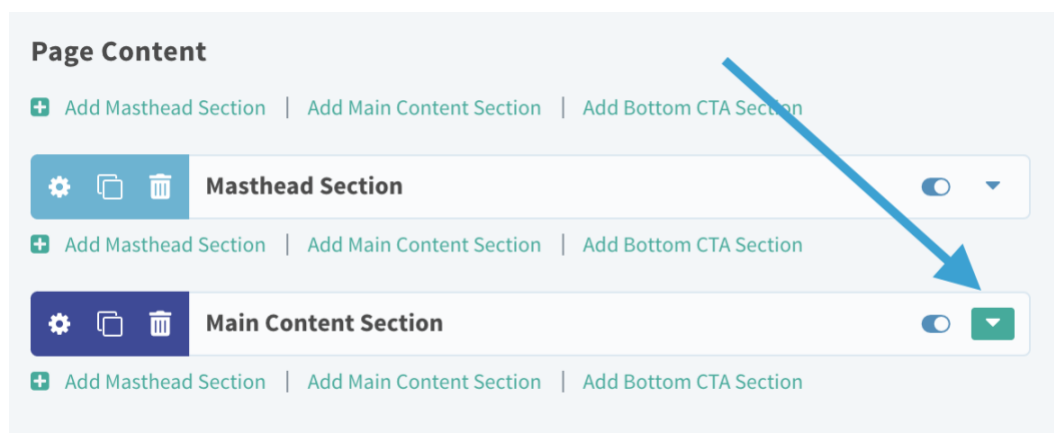
3. Click "Add Form."
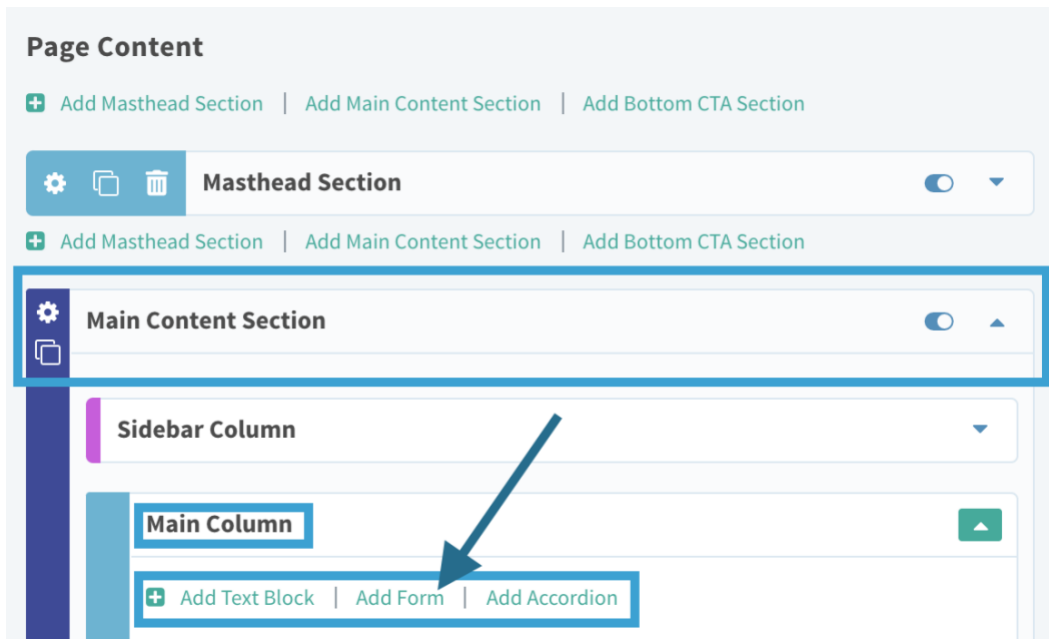
4. In the "New Form" pop-up window, enter the **form name** in the "Name" field.
   - Tip: Be sure to choose a name that you will recognize later in your form submissions module.
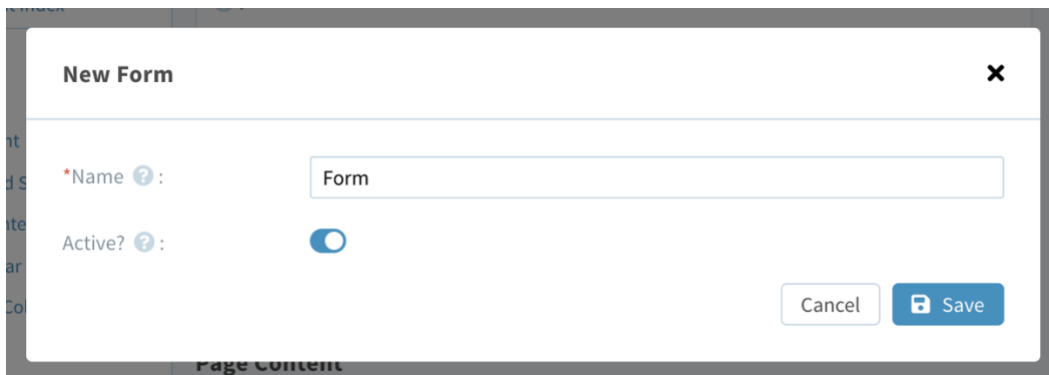
5. Click **[Save]**. New fields will then appear under the "Form" subsection.
6. Fill in the following fields:
   - **Header:** The header text will appear above your form. This field is optional.

- **Form Name:** Re-enter the form name.
- **Send Submissions to Email**: Set the toggle button next to "Send Submissions to Email?" to **"ON"** to have form submissions sent to an email address in addition to being stored in the form submissions portion of your CMS site manager.
- **Recipient Email Address(es):** Enter the email addresses that will receive the form submissions. You can add multiple email addresses to this field – simply separate them with a comma.
- **Send Email to User:** If you would like the website user to receive an email after submitting their form, set the toggle button to **"ON"** next to "Send Email to User?".
- **Email Field Name:** Enter the name of the field on the form where the user will enter their email addresses (ex: Email or Email Address).
- **Email Subject:** Enter the text that you would like to have appear in the subject line of the automated email.
- **Email From:** Enter the email address that the email will come from (ex: info@yourwebsite.com).
- **Email Body:** Enter the text that you would like to have appear in the body of the automated email.

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- **Submit Button Text**: Enter the text for the button the user will click to submit their form (Example: Submit or Send).
- **Redirect URL:** If you would like your user to be redirected to another page after submitting their form (such as a FAQ page), enter that URL in this field.
  - If you are linking to a page on your website, be sure to use the relative URL. (Example: /faq)
- **Confirmation Text:** This is a message that will appear to let the user know their form has successfully been submitted.

FORM FIELDS

1. To begin adding fields to your form, click the **[Add Field]** button.
2. In the "Add Form Field" window, select the type of field you would like to add from the **"Type"** dropdown. The dropdown options are:

- **Text:** Most suitable for short text such as a full name.
- **Email:** Requires the user to enter an email address that includes the @ symbol.
- **Phone**: Requires the user to enter a 10-digit phone number.
- **Long Text:** Ideal for comments or questions.
- **List Menu:** A drop-down menu with the option for the user to select one item or more than one item.
- **Date:** Requires the user to enter information in a date format.
- **Time:** Requires the user to enter information in a time format.
- **Radio Button:** This includes a 'Yes' or 'No' response to a question.
- **Email Attachment**: Allows the user to upload a file to the form.

- Note: You must use the "Send Submissions to Email" feature if you use this option. Attachments will not be stored in your CMS, but instead sent to the email address(es) added in the [Recipient Email Addresses] field.
  - **Header:** This allows you to insert a title into the form to categorize content.
3. **Title**: Enter the text that will appear within the filed.
   - Example: "Full Name" "Email Address" "Phone Number," etc.

4. **Required:** Set the toggle button to "ON" to make this a required field on the form.
   - A site user cannot submit the form until they complete the required fields.
5. Click [Add Field].
6. Once your field has been added, you have the option to set the "Maximum Characters" which will determine a character limit.

Fields

Tip: To rearrange the order of the fields that appear on your form, click on the field title then hold down your mouse to drag & drop the field before or after another field on your form.

Completing a Page

When you finish creating or editing a page, you have the options to preview, publish, save, or cancel.

Publish: Click [Publish] to make the new page or changes to an existing page live on your website.

Preview: Click [Preview] to preview your changes before making them live on your website.

Tip: *You must first save your changes to preview them.*

Save: Click [Save] to save your changes. Saved changes will not be live until you click "publish".

Cancel: Click [Cancel] to close the page **without** saving your changes.

<u>Other Page Options</u>

When creating or editing your page, you also have the following options:

- **Copy:** Click the [Copy] button to create a duplicate of the page.

- **Delete:** Click the [trash icon] icon to delete the page.
  - o Warning: deleting your page will permanently remove the page from your CMS. Deleted pages can only be recovered by reverting to a previous version of your website, so make sure not to use the delete function unless you are certain you will not need this page.
- **Back to List:** Click the [Back to List] button to return to the "Pages Module" landing page.
  - o Tip: Be sure to save any changes before clicking the [Back to List] button.

Navigations

The navigation portion of your AccuCMS allows you to organize/edit the links in your website's navigation.

To get started, click on the arrow on the "Content" tab and then on the "Navigation" tab. This will take you to a landing page containing all of your website's existing navigation.

Navigations Dashboard

- The **[Add New]** button will redirect to the screen where you can create new navigation.
- The **Search Keyword** bar allows you to search for a specific navigation by entering a keyword.

Information about your website's navigation is divided into the following columns:

- **Navigation:** Lists all of the navigations that appear on your website.
- **Description:** Allows you to enter a brief message about the navigation or notes for your team. This text is for internal use and will not display on the front-end of your website.
- **Last Modified**: Displays when the most recent changes were made to the navigation and which CMS user made those changes.
- **Action Icons:** The final two columns display icons for common actions when using the Navigations module.

    - The icon will take you to the screen to edit the selected navigation.

    - The icon will delete the page.
        - Warning: deleting your page will permanently remove the page from your CMS. Deleted pages can only be recovered by reverting to a previous version of your website, so make sure not to use the delete function unless you are certain you will not need this page.

Creating a Navigation

To create a navigation:

1. Click the [Add New] button. You will be taken to a screen with the title **"Add New Navigation."** Here, you will enter the name of the navigation and an internal description.
    - **Navigation Name:** For internal use and will not appear on the front-end of your website.
    - **Internal Description:** Here, a message can be added if desired, such as "do not delete." This will not appear on the front-end of your website.

2. Click **[Save]**. You will then be redirected to a page titled **"Navigation"** to begin adding links to your navigation.

3. You will see that your **Page Name** and **Page Friendly URL** have been automatically populated based on the information entered on the previous screen.

4. Click [Add New] next to "Links in the Navigation." This will open a window titled "Add New Navigation Item."

5. Enter the **"Item Name"**. This is the clickable text that will appear in the navigation.

6. In the "**Link To**" dropdown, select whether you would like to link to an internal page (a page on your website) or an external page (a page on another website).
   - If you select "Internal Page" a "Page" dropdown will appear.
   - From the "Page" dropdown, select the page you would like to link to on your website.

7. If you would like the page to open in a new tab, set the toggle button to "ON" next to "**Open in New Tab**".
   - Tip: If you are linking to an internal page, select to open in the same tab. If you are linking to an external page, select to open the page in a new tab.
8. Click [Save].

Moving/Modifying Navigation Links

To change the order of your navigation links:

1. Click on the desired link.
2. Hold down your mouse.
3. Drag and drop the link before or after another link.

To delete a link from your navigation, click the icon

To edit a link in the navigation, click the icon.

Completing Your Navigation

You can choose from the following options when completing the changes to your navigation:

- **Back to List:** Returns you to the main navigation interface.
- **Delete:** Deletes the navigation from your CMS.
   - Warning: Deleted navigation can only be recovered by reverting to a previous version of the website which requires billed programming time.
- **Cancel:** Will take you back to the navigation interface without saving your changes.
- **Save:** Saves your changes to your navigation. These changes will instantly be live on the front-end of your website.
   - Note: If you do not see the changes you made, please refresh your browser.

Media Files

The Media Files portion of the AccuCMS allows you to store images and documents within the system.

To get started, click on the arrow on the "Content" tab and then on the "Media Files" tab. This will take you to a landing page containing all of your website's existing media files and folders.

Media Files Dashboard

- The arrow beside the **[Add New]** button allows you to add a new file or a new folder to your Media Files module.
  - **[File]** will take you to a screen to begin creating a new file.
  - **[Folder]** will take you to a screen to begin creating a new folder.
    - As the number of files on your website starts to grow, you may want to organize them into folders.
- **[Drag & Drop]** allows you to quickly drag a file from your desktop into a window to be uploaded to your Media Files module.
- The **Search Keyword** bar allows you to search for a specific media file by entering a keyword.

Information about your website's media files is divided into the following columns:

- **Display Thumbnails:** By clicking the image icon, you can preview the documents or images.
- **Title:** This column lists all of the folders or files stored in your media files module.
- **Size:** Displays the size of the file or folder.
- **Dev File:** "Yes" means it is a development file and should not be deleted.
- **Description:** This is an internal note about the file or folder and does not appear on the front-end of your website.
- **Last Modified:** This displays when the most recent changes were made to the file or folder and which CMS user made those changes.
- **Action Icons:** The two final columns display icons for common actions when using the Media Files module.
  - The icon will take you to the screen to edit the selected navigation.
  - The icon will delete the page.
    - Warning: Be cautious when using this function. Deleted files or folders can only be recovered by reverting to a previous version of the website, which will require billable programming time.

Uploading a File

To upload a file directly to the Media Files module:

1. Click the arrow icon next to the **[Add New]** button and click **"File".** This will open a page titled **"Add New Media File - /Files/Content/."**
2. **File:** In the "File" field, click the **[Select File]** button.
3. Select an image/document from your computer.
4. **Description:** Add an optional description for the file. This is for internal use and will not appear on the front-end of your website.
5. **Replace Existing File:** Select "yes" if you are replacing a file by the same name that already exists in your Media Files module.
6. **Dev. File:** Select "yes" if it is a development file that should not be deleted.
7. Click **[Save]**.

Creating a Folder

To create a media files folder:

1. Click the arrow icon next to the **[Add New]** button and click **"Folder."** You will be taken to a screen with the title "Add New Folder – Files/Content/."
2. **Folder Title**: The name of your folder.
   - This is for internal use and will not appear on the front-end of your website.
   - The folder title will be part of the folder's file path and cannot contain any spaces or special characters.
3. In the "**Internal Description**" field, an internal note may be added if desired such as "do not delete" or "these images go on the about page".
4. **Dev Folder**: Select "yes" if it is a development folder that should not be deleted.
5. Click **[Save]**.

Uploading Files to a Folder

There are two options for uploading an image to a folder.

Option 1:

1. From the Media Files main interface, click on your folder "Title" or click the icon.
2. Click the arrow icon next to the **[Add New]** button and click **"File."**
3. Click [Select File].
4. Select an image/document from your computer.

5. Add a description for the file.
    - This is for internal use and will not appear on the front-end of your website.
6. **Replace Existing File**: Select "yes" if you are replacing a file that already exists in your media files module.
7. **Dev. File:** Select "yes" if it is a development file that should not be deleted.
8. Click [Save].

Option 2:

1. From the Media Files main interface, click on your folder "Title" or click the ✎ icon.
2. Click [Drag & Drop].
3. Click on the box titled **"Drag & drop files here**."
4. Select the file from your desktop.
5. Click the **"X"** button to close out of the Drag & Drop editor.

Templates

The template section of the CMS stores the website's code. If you are familiar with the HTML programming language, this is where you can make changes to your HTML.

If you are not familiar with the HTML programming language, you can set yourself as a "User" or "Admin" in your CMS User settings so that this module is no longer visible.

Warning: Something as small as a misplaced semi-colon could damage your website. Please proceed with caution.

CMS Users

The CMS Users module allows you to create and manage the users who have access to the AccuCMS.

To get started, click on the arrow on the "Users" tab and then on the "CMS Users" tab. This will take you to a landing page containing all of your website's existing CMS users.

CMS Users Module Dashboard

- The **[Add New]** button allows you to add a new CMS user.
- The **Search Keyword** bar allows you to search for a CMS user by entering a keyword.

Information about your CMS users is divided into the following columns:

- Username
- First Name
- Last Name
- Email
- **Role:** A user can be set as a user, admin or developer based on the access they need in the CMS.
- **Active:** Only active users have access to the AccuCMS site manager.
- **Last Modified:** Displays when the most recent changes were made to the CMS User's settings and which CMS User made those changes.

Creating a New CMS User

To create a new CMS User:

1. Click the **[Add New]** button. You will be taken to a new page titled **"Add a New User."**

Add a New User

2. Fill in the following fields:
   - From the "Role" dropdown, select from the following:
     - **User:** Has restricted access when working in the AccuCMS.
     - **Admin:** Has global access with the exception of access to templates or the ability to modify developer users or files.
     - **Developer:** Has no restrictions (for experienced web developers only).
   - **Username:** The name the user will use to log into the AccuCMS.
   - **First Name:** The user's first name.
   - **Last Name:** The user's last name.
   - **Email Address:** Enter the best email address to reach this individual.
   - **Phone Number:** Enter the best phone number to reach this individual.
   - **Active:** Select "yes" to make this user active. Only active users can access the AccuCMS site manager.
   - Click [Save].
3. Next, a password field will appear under the "Username" field. Click the **"Edit"** button and a **"Change Password"** pop-up will appear.

- Fill in the "New Password" and "Confirm New Password" fields.
- Click [Save].
4. Click **[Save]** to finish.

Customizing "User" Permissions

If you create a new CMS User and assign them as "User" in the "Role" dropdown, you have the option further customize their access within the AccuCMS.

To customize the "User" permissions:
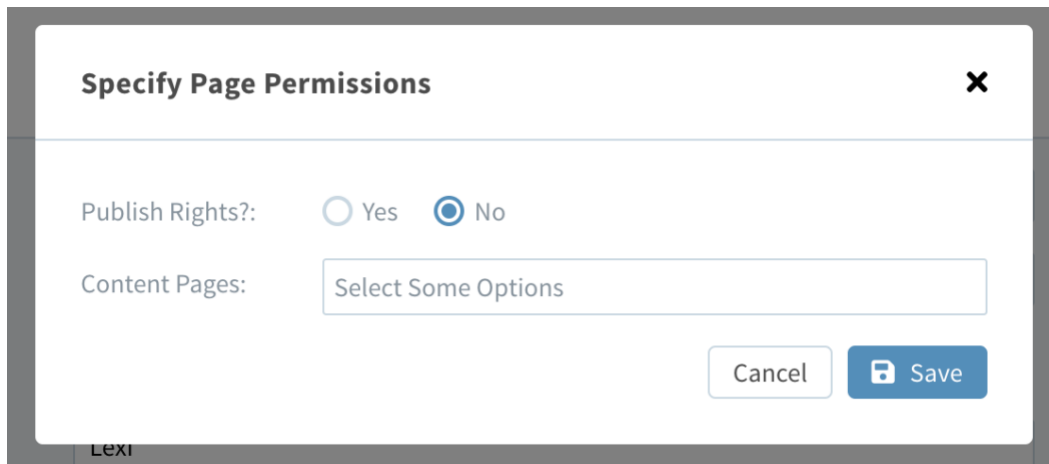
1. Select **"User"** in the **"Role"** dropdown.
2. Click **[Save]**. A new column called "Permissions" will appear below the [Save] button.

Using the check boxes, you can grant the user the following permissions:

- **Read:** If you check the "read" checkbox, the user can make changes to the section but cannot publish those changes to the front-end of the website.
- **Write:** If you check the "write" checkbox, the user can both make changes to the section and publish those changes to the front-end of the website.
- **Additional:** To select specific pages the user can access, click the **"Edit"** button in the **"Additional"** column. This will open a pop-up titled **"Specify Page Permissions."**

- o **Publish Rights?** If you would like the user to be able to publish the specified pages, click the "yes" button.
- o **Content Pages:** Click the "Content Pages" field, then click the specific pages you would like the user to have access to. Click each page name one at a time.
- o Click **[Save]**.

Once the green "Permissions have been successfully saved" message appears, click the **"X"** (exit) button to close the pop-up.

On the CMS User page, click the **[Save]** button again to save all of your changes.

Deleting a CMS User

To delete a CMS user:

1. Click their username from the "CMS Users" interface.

2. On the "CMS User" page, click the 🗑 icon to permanently remove the user.
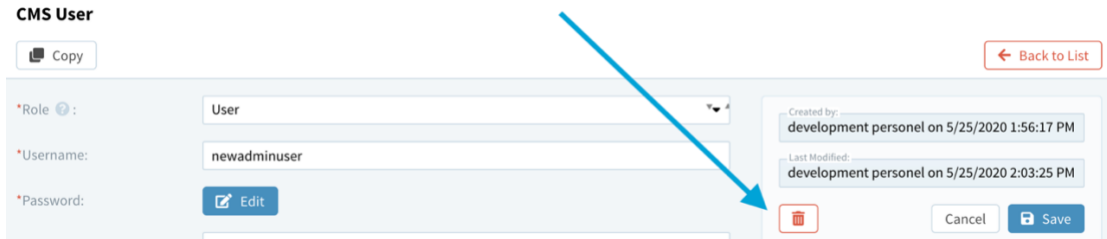
Access Log

The Access Log allows you to view which users have made changes to the CMS and when those changes were made.

To get started, click on the arrow on the "Users" tab and then on the "Access Log" tab. This will take you to a landing page listing any recent changes to the AccuCMS.

Access Log Dashboard

- The **[Download.csv]** button allows you to export the access log activity to your desktop.
- The **Search Keyword** bar allows you to search for specific information by entering a keyword.

The Access Log information is divided into the following columns:

- **User:** Lists the username of the person who has been active in the CMS.
- **Login Date:** Displays the date and time when the user was active in the system.
- **Activity**: Shows the time in minutes the user was active.

- **Preview:** The ⊙ icon shows a breakdown of the actions taken by the user.
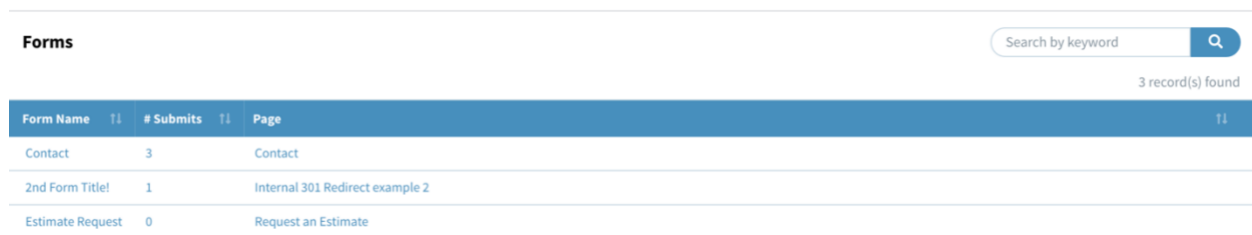
Reports

Form Submissions Module

The Form Submits Module allows you to view any submissions received via your website's forms.

To get started, click on the arrow on the "Reports" tab and then on the "Form Submits" tab. This will take you to a landing page listing all of your website's forms.

Form Submissions Dashboard
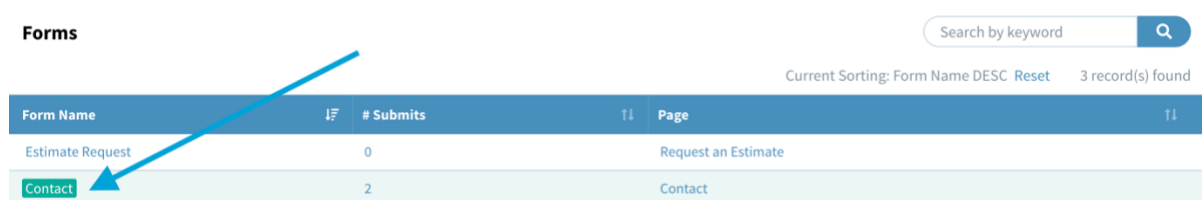
- The **Search Keyword** bar allows you to search for a specific form by entering a keyword.

Information about your forms is divided into the following columns:

- **Form Name:** The name given to the form when created.
- **# Submits:** The number of submissions received to the given form.
- **Page:** The page the form appears on.

Viewing Form Submissions

To view a form's individual submissions, click on the Form Name.

This will take you to a page titled "Form Submits" that lists the individual form submissions.

Form Submits

- To download your submissions as an Excel file, click the arrow next to the **[Download.csv]** button.
  - To download each submission, click **"All Form Submits."**
  - To download only submissions you've selected via the checkboxes, click **"All Selected Form Submits."**
- To delete submissions, click the arrow next to the **[Delete]** button.
  - To delete all submissions, click **"All Form Submits."**
  - To delete only the submissions you've selected via the checkboxes, click "**All Selected Form Submits."**
- To view the individual submission, click on the **submission date.**
- To search for an individual submission or text string, enter a keyword in the **"Search text"** field.
- You can also search via date by filling in the "Date" fields.
- To activate your filters, click the **[Filter]** button.
- To clear your filters, click the **[Clear]** button.

Site Errors Report

The Site Errors Report Module displays any identified errors occurring on your website.

To get started, click the arrow on the "Reports" tab, then click the "Site Errors Report" tab. This will take you to a landing page containing all error reports.

SEO

The SEO portion of the AccuCMS allows you to insert your Google Analytics tracking code, add tags to your website, connect your website to Google Ads, set up 301 redirects, and edit your schema markup.

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Analytics & Tags

To get started, click on the arrow on the "SEO" tab and then on the "Analytics & Tags" tab.

Using this module, you can insert the following information to help improve and track your website's search engine optimization:

- **Google Analytics**: This will help you track information about the traffic to your website. Insert the tracking code from the property settings section of your Google Analytics account.
- **Google Tag Manager:** Google Tag Manager helps manage tags on your website for enhanced marketing and analysis.
- **Google Ads:** Google Ads (previously known as Google Adwords) is an advertising platform. If you have a Google Ads account, add the code to this field.

Click **[Save]** to save any changes.

301 Redirects

The 301 Redirects section of the AccuCMS allows you to view or create 301 Redirects. A 301 Redirect is a permanent redirect from one URL to another.

To get started, click the arrow on the "SEO" tab, then click on the "301 Redirects" tab.

- The **[Add New]** button allows you to create a new 301 Redirect.
- The **Search Keyword** bar allows you to search for a specific 301 Redirect by entering a keyword.

Information about your website's 301 Redirects is divided into the following columns:

- **Page Name (Description)**: A description or overview of the 301 Redirect.
- **Old URL:** The URL that the redirect points *from.*
- **New URL**: The URL that the redirect points *to.*
- **Active**: Displays whether the 301 Redirect is active. Only active 301 Redirects will direct users to the New URL.
- **Last Modified**: Displays when the most recent changes were made to the 301 Redirect and which CMS user made those changes.
- Action Icons:

    - The icon allows you to edit the selected 301 Redirect.

    - The icon will delete the selected 301 Redirect.

Creating a 301 Redirect

To create a 301 Redirect:

1. Click the **[Add New]** button. You will be taken to a page titled **"301 Redirect."**

301 Redirect

Page Name (description):	Redirect to new contact page
*Old URL:	http://www.domain.com/ contact
*New URL:	bluearcher.com/new-contact
Active?:	⦿ Yes ◯ No

Created by:
development per

🖫 Save

2. **Page Name:** Enter what you would like to call the redirect.
3. **Old URL:** Enter the relative URL of the page you are pointing *from.*
   - Tip: A relative URL is what appears after your domain name in the URL for the page (example: /about-us).
   - The 301 redirect is intended to redirect inactive or missing URLs. Therefore, you must make the old URL page inactive or delete the page entirely.
4. **New URL:** Enter the full URL for the page you are pointing *to.*
5. **Active:** Click "Yes" to make your 301 Redirect active. Only active 301 Redirects will point users to the New URL.
6. Click **[Save]**.

Schema Markup

The Schema Markup portion of the AccuCMS is where you can manage your schema markup. Schema markup simplifies website indexing and enhances search engine visibility through potential rich snippets.

To get started, click on the arrow on the "SEO" tab, then click on the "Schema Markup" tab.

The Scheme Markup page is divided into the following sections:

Website Schema

- **URL:** This is the domain name that was purchased for your website. This has been automatically populated for you.
- **Name:** Enter your company name.
- **Active:** To make this schema content active, click "Yes".

Organization Schema

- **Name:** Enter the name of your organization.
- **Logo:** Upload a logo that fits the recommended dimensions.
- **Image:** Upload an optional general image to represent your business
- **Description:** Enter a brief description of your business.
- **Email:** Enter your company email address.
- **Area Served**: Enter the general area your business's serves (Example: Western Pennsylvania)
- **Location:** Enter the name of your general area (Example: Pittsburgh)
- **Founding Location:** Enter your business's founding location.
- **Address:** Enter your business's address.
- **Active:** To make this schema content active, click "Yes".

Click **[Save]** to finish.

Settings

The Settings section of your CMS allows you to manage your website's basic settings.

To get started, click on the "Settings" tab.

General Settings

Under General settings, you can update the following information:

- **Client Name:** The name of your business. This field is automatically populated for you.
- **Production URL:** The domain name that was purchased for your website.
- **Favicon:** A small icon or logo that appears to the left of a page's browser title.
  - Tip: Before uploading a Favicon, be sure to first resize the image to 32 x 32 pixels.
- **Shortcut Icon:** An icon that appears when you share a link to your website on a mobile device.
  - Tip: Before uploading a shortcut icon, be sure to resize the image to 180x180 pixels.

- **System Email:** Emails from your website will come from this email address.
- **Site Error Notification Recipient Emails:** If an error occurs on your website, a notification regarding the error will be sent to these email addresses.

System Settings

Under System settings, you can view:

- **Front-End File Size Limit:** The maximum size of front-end images (example: image field files) that can be uploaded to the AccuCMS.
- **Back-End File Size Limit:** The maximum size of back-end files (example: media files) that can be uploaded to the AccuCMS.
- Site Mode:
  - **Development** indicates that your website has yet to launch.
  - **Production** indicates that your website has launched and is live on the web.

Help

The Help section of the AccuCMS contains contact information for Blue Archer's support department and provides helpful resources regarding the AccuCMS.

Help Dashboard

The Support page provides the following information:

Help & Support

Click the icons to:

- Call our support department
- Email our support team (support@bluearcher.com)
- Submit a support ticket

When submitting a support ticket, please keep in mind there are two different types of support requests:

1. **Bugs**

   The first type of support request would be something that is generating an error or displaying a behavior that deviates from the website specifications/requirements. These are considered "bugs" (once tested and verified). Please do not hesitate to report something like this to our support department.

   Tip: When you are calling or emailing about a bug, thorough details will assist in addressing the issue more quickly.

   When you call or email Blue Archer support, be sure to include:

   • What were you doing or trying to do when the bug happened

   • What page the bug happened on

   • Whether the bug occurred on the front-end or the back-end of the website

   • The browser and platform you were using (Google Chrome / version #, on Windows or MacOS, for example). Note, make sure you are using the most current, updated version of a supported browser for your OS (Google Chrome and Microsoft Edge on Windows, Google Chrome on Mac).

2. **How Do I?**

   The second type of support request would be a CMS question or a "how do I" question. Our support department is happy to answer these types of questions, however, providing this type of support is billable.

Tip: We offer free training sessions that review and answer these questions every other Wednesday. You may sign up for as many free training sessions as you want. On CMS training calls you can ask any question free of charge.

Resources

Click the icons to:

- Sign up for a free CMS training webinar
- Request a custom module training (billed at our usual hourly rates)
- Download this AccuCMS User Manual

Follow Us

Click the icons to follow Blue Archer on the following social media channels:

- Facebook
- Twitter

- LinkedIn
- Instagram

Support Hours

Blue Archer Support is available Monday – Friday, 9 a.m. - 4 p.m.