Digital Agent Training Document

Web Admin User Guide

Winter 2020

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1 Getting Started with Digital Agent

1.1 Supported Browser Versions

Digital Agent is a web-based application and can be used through your web browser. We currently support the following browsers and their latest versions.

- Microsoft Internet Explorer 11.0
- Mozilla Firefox
- Apple Safari
- Google Chrome

1.2 Generating Your Website

If this is your first-time logging into your account, you will need to generate your website

1. Navigate to **Dashboard & Settings**, and click on **Get Started**
2. Choose your **theme**. You can preview a theme and its features by clicking on the **Preview** button
3. Set up your **Website Address** (i.e. URL) and **Website Title** (i.e. the title that appears at the top of your visitor's web browser) Note: your website address must be unique. You will be notified by the system if your website address has already been used. If you would like to use a personalized domain, please contact us at support@digitalagent.ca
4. Click on **Generate**

Once your website is generated, you will be presented with a summary of your website address, website title, theme selection, and theme features. Click on **Start your Digital Journey** and you will be able to launch your website.

1.3 Changing Your Login Email

1. Click on the **Hello, "Your Name"**! button on the top right of the screen and select **My Account**
2. Type in your **New Login Email**, and then re-type it to **Confirm the Email**
3. Click on **Save Email**, and you will be able to login using the new email address

1.4 Changing Your Password

1. Click on the **Hello, "Your Name"**! button on the top right of the screen and select **My Account**
2. Type in your **Current Password**
3. Type in your **New Password**, and then re-type it to **Confirm the Password**
4. Click on **Save Password**, and you will be able to login using your new password

1.5 Forgetting Your Password

If you forget your password, we've placed a link on the login page.

1. Click **I can't sign in or forget my password**

2. Type in your **Account Email Address** that you signed up with, then click **Email Reset Instructions**. You will receive an email containing a **Password Reset Link**
3. Click on this link, and you will be taken to a **Password Reset Page**. Type in your **Email** and your **New Password**, then re-type your new password
4. Click on **Confirm Password** and you will be able to login using the new password

2 Dashboard & Settings

2.1 Understanding the Dashboard

Navigate to Digital Workspace and click on **Dashboard & Settings**. The Dashboard provides Digital Agent users with a detailed view on the performance of their websites.

- **Dashboard Timeframe**: clicking on the following buttons will change the timeframe of the analytics
    - **This Year**: presents data for the current year to date
    - **Last Month**: presents a full month's worth of data from the previous month
    - **This Month**: presents data from the first of the current month until the current date
- **Attraction**: measures the acquisition of traffic
    - **Visits**: the amount of hits your website receives in a given time period. Every time someone opens up your website, a visit is recorded
        - Hovering your cursor over the line of the graph will show the number of visits on an exact date
    - **Referral Medium**: the source of the traffic that is visiting your website. Possible mediums include:
        - **Organic** (unpaid search): someone typing in a search term in Google or Bing discovers your website
        - **CPC** (cost per click): if you are running a Google Adwords campaign, this would be the metric you would use to determine if you are getting inbound traffic from that campaign
        - **Referral**: another site has linked to your website and a visitor came to your website through the other site
        - **Email**: when someone clicks on mail to
        - **None**: this is direct traffic (i.e. a visitor typed your web address into their browser and visited your site). Visitors who have bookmarked your page would appear this way as well
    - **Top 5 Referrals Sources**: every referral to your website has an origin or source. Possible sources include:
        - **Search engines** (e.g. Google, Bing, etc.)
        - **Social media sites** (e.g. Facebook, Twitter, LinkedIn, etc.)
        - **Direct traffic**
    - **Top 5 Blog Posts**: if you are using the blogging feature, this information will be populated with your top 5 most read blog posts.

    - **Top 5 Landing Pages**: a landing page is the first page that your visitor sees when they come to your website. For example, if a visitor searches for "retirement" and Google matches that keyword to a blog post and the visitor clicks on the blog post, then blog post is then recorded as having a landing page visit. This section will show the top 5 landing pages with the most visits.
    - **Top 5 Pages**: this metric measures the total number of visits to your website's pages and shows the top 5
- **Engagement**: measures the effectiveness of your website and content. Good engagement metrics indicates sufficient and engaging content that encourages visitors to stay on your website. To view metrics for a specific date, hover over the line of the graph with your cursor.
    - **Bounce Rate**: indicates the percentage of people who enter your website and immediately leave without navigating around your website (i.e. they only visited one page)
    - **Page Views/Visit**: when a visitor comes to your website, a visit is logged. Once they are physically sitting on a page and they click to another page, the page is recorded as having been visited.
    - **Average Time on Site**: the average visit duration
- **Conversion**: measures reciprocated feedback from your visitors (e.g. when a visitor fills out a form)
    - **Number of email contact attempts**: the number of times an email address from your website has been clicked to initiate a new email
    - **Top 5 Poll Responses**: the number of times a poll has been submitted on your website
    - **Top 5 Form Responses**: the number of times a form has been filled out on your website
- **Workflow Status**: an overview of your submitted documents for compliance. Pending submissions are highlighted in yellow and rejected items are highlighted in red. To review Workflows Details click **More details** to see the status, last edited time and number of posts you have submitted.

2.2 Understanding the Settings Page

2.2.1 Site

Navigate to the **Dashboard & Settings Page** from Digital Workspace and select the **Settings** tab at the top of the page and click the **Site** tab. Below is a list of all of the possible functions on the Site page and their functions:

- Customize global options for your website
- **Domain**: your website address (to use your own domain please send an email to support@veriday.com)
- **Site URL**: this is the first thing Google and other search engines will use to find you and validate that you are real. Tip: keep your URL short and simple
- **Site Title**: this is the second thing Google and other search engines will use to find you. Tip: keep your site title relevant to your business (e.g. your business name)

- **Google Analytics**: If you have your own Google Analytics Key, you can insert it here and get more details on your site's visitors through Google Analytics
- **Supported Locales**: Used to activate multiple locales (refer to 2.4)
- **Default Language:** used to select the language your website will be automatically set to
- **Default Time zone:** Used to select the time zone your website will be automatically set to

2.2.2 Theme Options

Navigate to the **Dashboard & Settings Page** from Digital Workspace and select the **Settings** tab at the top of the page and click the **Theme Options** tab. Below is a list of all of the possible functions on the Site page and their functions:

- **Theme Options** - Website design options
- **Custom Banner:** You may upload a custom image that will appear as the banner on a page of your website
- **Banner**: it will display on all pages excluding any pages with custom banners
- **Banner Alternative Text:** text that will be displayed when the banner does not load
- **Footer:** Check the box to display all associated branch locations in the footer of your website

2.3 Understanding the Themes Page

1. Navigate to the **Dashboard & Settings** Page and Select the **Themes** tab at the top of the page
2. Preview all the different theme options by clicking the blue **Preview** button
3. When you have chosen a theme, you would like to use for your website, click **Activate**

Note: If you are looking for a change in the look or feel of your website you can browse the selection of templates to see if there is one that better suits your brand. If you do not see one that suits your brand, ask about our custom design services.

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2.4 Changing Your Website Title

1. Navigate to **Dashboard & Settings**, then select **Settings**. Make sure that you are under the **Site** tab
2. Simply click on the **Site Title** field and change your title
3. Click on **Save Changes**

2.5 Adding Locales

1. Navigate to **Dashboard & Settings**, then select **Settings**. Make sure that you are under the **Site** tab
2. Select all any applicable languages under the **Supported Locales** section
3. Click on **Save Changes**

2.6 Changing Your Banner

1. Navigate to **Dashboard & Settings**, then select **Settings**. Make sure that you are under the **Theme** tab

2. If you would like to change your **Banner**, simply select a new image (if available) and click **Save Changes**

2.7 Advanced Page Options

Advanced page options allow you to add different assets to individual pages on your website.

1. Navigate to **Dashboard & Settings**, then select **Settings**. Make sure that you are under the **Your Pages** tab
2. Select a page from your Menu Structure
3. Scroll to the bottom of the Page Options and click on "Advanced Options"

Here you can upload things such as custom banners, page feature images and a number of other assets depending on what your theme supports.

2.8 Password Protect a Page

1. Navigate to **Dashboard & Settings**, then select **Settings**. Make sure that you are under the **Your Pages** tab
2. Select a page your Menu Structure.
3. Click on **Manage Passwords for this page**.
4. Click on **+Add Page Password**.
5. Enter your password and click the check market under **Actions**.

3 Profile and Team Management

3.1 Editing Your Profile Information

1. Navigate to **My Profile** from Digital Workspace and make sure that you are under the **My Profile** tab. On this tab your profile information will be displayed on your web gadgets like Biography or Newsletter. You can also add additional team members through the Team Members Tab
2. To edit the profile information, simply click on the text box that you would like to edit and make any necessary changes
3. Click on **Submit for Approval** when you are done

3.2 Restoring an Older Profile Version

1. Navigate to **My Profile** and make sure that you are under the **My Profile** tab
2. Click on **Profile History** in the top right corner and you will see a list of all the history versions
3. Click on **Retrieve Info,** under the actions column, beside the version that you would like to restore.
4. Select the **checkboxes** beside the information you wish to restore or click on **Select All**
5. Click on **Restore Selected**
6. **Confirm** the restoration and the restored version will become the latest version

3.3 Adding Team Members

1. Navigate to **My Profile** and select the **Team Members** tab
2. Click on **+Add Team Member**
3. Fill out the team member's profile and contact information (e.g. Display Email, First Name, Last Name, etc.)
4. Upload a profile photo for the team member by clicking Choose File (Note: Please make sure your profile picture is a valid image file and your file size should be less than 250KB (250,000 bytes) and 160px wide)
5. Click on **Submit for Approval**. Note: The team member will be labeled as **Draft**. For your team member to display on your website, click on the **Submit for Approval** button for approval. Once the team member is approved, they will be displayed on your website.
6. To edit your Team Members, click on **Edit** located under actions and edit the information you want, then click on **Save**.

3.4 Arranging Team Members

1. Navigate to **My Profile** and select the **Team Members** tab
2. Click on **Edit Display Preferences**
3. Click on the ✥ Icon next to each Team Member and drag the member to the desired location
4. Click on **Save Changes** to confirm the new order

3.5 Deleting Team Members

1. Navigate to **My Profile** and select **Team Members**
2. You can delete one or more team members
    a. To delete a single team member, click on 🗑 beside the team member Note: Primary Team Members cannot be deleted
    b. To delete multiple team members, select the **checkboxes** beside the team members, then click on **Delete Selected**. Tip: selecting the checkbox beside the data grid title **Status** will select all team members
3. A pop up will up to ask for your confirmation, type in **DELETE** in all capitals and click on **Confirm**. Once a team member is deleted, it will be listed under the **Deleted Team Members** section and you can no longer add their profile to your website nor will they appear on your website

3.6 Restoring a Team Member

1. You can either restore a team member from the **Deleted Team Members** section within the Team Members tab or from the **Recycle Bin** (refer to 10.1)
2. You can restore one or more team members
    a. To restore a single team member, click on **Restore** beside the team member
    b. To restore multiple team members, select the **checkboxes** beside the team members, and click on **Restore Selected**. Tip: selecting the checkbox beside the data grid title **Name** will select all the deleted team members. The restored team members will be

labeled as **Draft**. In order for your team member to display on your website, click on the **Submit** button for approval. Once the team member is approved, they will be added to your website.

3.7 Restoring an Older Team Member Version

1. Navigate to **My Profile** and select **Team Members**
2. Click on **Version "X"** beside a team member and you will see a list of all the history versions of that team member
3. Click on **Retrieve Info** beside the version that you would like to restore
4. Select the **checkboxes** beside the information you wish to restore or click on **Select All**
5. Click on **Restore Selected**
6. **Confirm** the restoration and the restored version will become the latest version

3.8 Managing Team Profiles

If you are registered as a **Primary** Team Member, you also have access to **Team Profile** settings. These settings let you manage things such as your team name and photo.

1. Navigate to **My Profile** and select **Team Profile**
2. Under the **Team Profile** heading you can update the **Team Name, Email** and your **Website URL.**
    a. To change any of these parameters simply type in the appropriate field and click **Save**
3. To add or change your **Team Photo** simply click **Browse…** and select a file from your computer
4. Branch details cannot be edited by web administrators under Enterprise Mode. These details can only be changed by the system administrator

3.9 Practice Profile

1. Navigate to **My Profile** and select the **Practice Profile** tab.
2. Here you can view your Branch's information such as the branch profile, phone number, address and related locations. You are not able to edit your branch's information

Note: if you wish to change your branch, please contact your Marketing rep

3.10 Accessing other Profiles

If your **Administrator** has given you the correct permissions, Digital Agent gives you the ability to manage the profile (**Hub**) of another web administrators or branch from within your Digital Agent account. This feature will give you the ability to do things such as create blogs, forms or web content within the other Hub without having to log directly into their account. There are two ways to select another Hub to work within:

If it is your first time logging in to Digital Agent:

1. Enter your login credentials and enter **Digital Agent**. If you have access to other **Hubs**, you will be brought to the **Hub Selection Screen** which lists all the other user profiles you have access to
2. To work within another Hub simply **click** on the name of that Hub (ie. The name of the web administrators or branch that that Hub belongs to). This will bring you to the **Digital Workspace** of the owner of the **Hub** you selected Note: After you select a Hub your choice will be remembered. This means that the next time you login you will be brought directly to this hub

If you have previously selected a Hub to work within and would like to switch:

1. **Log in** to Digital Agent and click the **My Account** drop down menu in the top right hand corner of the screen (will be displayed as "Hello, (Your Name)!"
2. From the drop-down list, select the **Change Account** option and you will be brought to the **Hub Selection Screen**
3. To work within another **Hub** simply **click** on the name of the **Hub** (ie. The name of the web administrator or branch that that Hub belongs to) you would like to work within Note: This list will include your name. Clicking on your name will bring you back to your personal profile

Important Note: If you are working within another **Hub** that does not yet have **a generated website**, if you generate the website within that Hub you will be listed as **the owner** of that website and your information will populate the banner text. We recommend that each web administrator/branch log into their own profile and generate their own website before having other users make edits to their Hub.

4 Web Page Management

Your Pages: Want to make a change to an existing page? Or perhaps you'd like to add another exciting page to your website! Well you've come to the right place!

4.1 Adding a Web Page

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. Click on **Create a New Page or Add a Pre-Approved Page**
3. Click on **Type of Page** and select **Page in My Website**
4. Fill in the following fields:
    a. **Navigation Label**: this is the label on your website's navigation bar Note: Page in your website is a full webpage existing within your website, an Internal link is a link to a page in your website, an External link is a reference to another page
    b. **Page Title**: this is the page's title bar located at the top of your browser's window
    c. **Page URL**: when you fill in your Navigation Label, Digital Agent will automatically fill in the page URL. You can make changes to this field too.
5. Choose a **Standard Page Template**
6. Click on **Save This Page**. Once the page is saved, you will be able to edit the page settings (refer to 4.7), manage where it displays on the menu hierarchy (refer to 4.9), and add content to the page (refer to 11.2)

4.2 Adding a Pre-Approved Page Template

Before adding a pre-approved page, make sure that you have been granted access to pre-approved page. Contact your company's marketing team for instructions on how to grant access to pre-approved pages

Pre-Approved Page Template: A pre-approved page is completely managed by your organization's marketing team

1. Navigate to **Dashboard & Settings** and select the **Your Pages** tab
2. Click on **Create a New Page or Add a Pre-Approved Page**
3. Make sure that the Type of Page is **Page in My Website**
4. Fill in the following fields:
    a. **Navigation Label**: this is the label on your website's navigation bar
    b. **Page Title**: this is the page's title bar located at the top of your browser's window
    c. **Page URL**: when you enter in your Navigation Label, Digital Agent will automatically fill in the page URL, you can make changes to this field too.
5. Choose a **Pre-Approved Page Template**
6. Click on **Save This Page**

4.3 Linking Navigation Menu Items (Internal and External)

You can link navigation menu items to internal or external links when creating new web pages.

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. Click on **Create a New Page or Add a Pre-Approved Page**
3. Click on the **Type of Page** drop down box, this will present you with four options:
    a. **Page in your website**: a full webpage existing within your website
    b. **Internal Link**: a link to a page in your website
    c. **External link**: a reference to a page outside of your website
    d. **Menu Label:** a label for organization in your navigation panel (refer to 4.9 for Managing your Menu Hierarchy)
4. If you wish to link the page navigation menu to an internal link:
    a. Select **Internal Link** from the dropdown
    b. Type in the **Navigation Label** and **Page Title**
    c. Click on the **Linked Page** drop down box, this will present you with a list of all the web pages that you have created
    d. **Select** the page that you wish to link the page navigation label to
    e. Click **Save This Page**
5. If you wish to link the page navigation menu to an external link:
    a. Select **External Link** from the dropdown
    b. Type in the **Navigation Label** and **Page Title**
    c. Type in the **Linked Page's URL**
    d. Click **Save This Page**
6. Once the linked page is approved, your website visitors will be able to click on the navigation

menu and they will be taken to the linked page

4.4 Hiding a Web Page

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. Select the page you would like to hide
3. Check **Hide this page from the navigation menu**
4. Click on **Save This Page**
5. The page will be labeled as **hidden** and it will not be visible on your website unless they type in the web address of that page

4.5 Tagging a Web Page

Users can tag pages so that we can index and draw relationships between pages and content in the future.

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. **Select** the page that you would like to tag
3. Type in the **Tags** field and use commas to separate tags. Tip: Digital Agent remembers previous tags that you have created and gives suggestions as you type
4. Click on **Save This Page**

4.6 Creating the Web Page Meta Description

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. **Select** the page that you would like to edit
3. Type in the **meta description**. The **Search Result Preview** (i.e. how your page will appear in search engine results) will change automatically as you type.
4. Click on **Save This Page**

4.7 Editing Your Web Page Settings

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. **Select** the page that you would like to edit
3. Simply click on the text boxes and make changes
4. Click on **Save This Page**

4.8 Changing the Web Page Name to Other Languages

Make sure the multi-language feature is activated (refer to 2.5)

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. **Select** the page that you would like to edit
3. Click on the drop down box under **Choose Language** located at the top right corner
4. Select a language from the drop down

5. All the English fields will be duplicated. Click on the fields and manually translate them
6. Click on **Save This Page**

4.9 Managing Your Menu Hierarchy

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. Under **Menu Structure**
    a. Click **Edit Menu**
    b. **Drag and Drop** your pages to re-order them. Note that the first page is your home page. Note: when you move a page with sub-pages, all the sub-pages under it will be grouped and moved together
3. Click on **Save Menu** and the changes will be reflected on your website

If you create a page with sub-pages it will generate a **mega menu** on your website. You are allowed to stack these sub-pages several times in order to create large mega menus. For example, an About Us Page may have a Team Members tab and an Our Locations tab under it. Further to this, the Our Locations tab might have a Contact us tab under it.

4.10 Deleting a Web Page

1. Navigate to **Dashboard & Settings** and select **Your Pages**
2. **Select** the page that you would like to delete
3. Scroll to the bottom of the page and click on **Delete This Page**. Note: when you delete a page with sub-pages, all the sub-pages will be grouped and deleted together
4. A window will open to ask for your confirmation, type in **DELETE** in all capitals and click on **Confirm**. Once the page is deleted, it will be listed under the **Deleted Pages** section and the page will no longer be visible on your website

4.11 Restoring a Web Page

1. You can either restore a web page from the **Deleted Pages** section or from the **Recycle Bin** (refer to 10.1)
2. To restore a web page from the **Deleted Pages** section, **drag** the page from the **Deleted Pages** section back to the **Menu Hierarchy**. Note: when you restore a page with sub-pages, all the sub-pages will be grouped and restored together.
3. The restored page will be labeled as **hidden** at the bottom of the **Menu Hierarchy**
4. **Drag** the page to the desired hierarchy level and click on **Save Menu**
5. To **Unhide** the page, click on **Save This Page**, and the page will be visible on your website

5 Blogging

5.1 Creating a Blog Post

1. Navigate to **Blog** from Digital Workspace
2. Click on **Add Blog Post** to open the Blog Editor
3. Fill in the fields (e.g. Title, Content, Scheduled Date, Excerpt, etc.)
4. Click on **Submit for Approval.** Once the blog post is approved, it will be visible on your website (refer to 12.5)
5. If you want to edit a Blog Post, click **Edit** and edit the fields you want, then click **Submit for Approval**

5.2 Scheduling Blogs

1. Navigate to **Blog**
2. Click on **Add Blog Post** or **Edit** of the blog you want to edit to open the **Blog Editor**
3. Type in the date and time that you want to publish your blog in the **Scheduled Date**
4. Click on **Submit for Approval**

5.3 Search Engine Optimizations

1. Navigate to **Blog**
2. Click on **Add Blog Post** or **Edit** to open up the **Blog Editor**
3. Navigate to **Search Engine Optimization**. Add a Meta Description to the **Search Result Preview** (i.e. how your blog will appear in search engine results). The preview will change automatically as you type. This description helps search engines and possible visitors understand your site better.
4. Click on **Submit for Approval**

5.4 Tagging Blog Posts

1. Navigate to **Blog**
2. Click on **Add Blog Post** or Edit to open up the **Blog Editor**
3. Type in the **Tags** field and use commas to separate tags. Tip: Digital Agent remembers previous tags that you have created and gives suggestions as you type
4. Click on **Submit for Approval**

5.5 Categorizing Blog Posts

1. Navigate to **Blog**
2. Click on **Add Blog Post** or **Edit** to open up the **Blog Editor**
3. Check off the appropriate **categories**
4. Click on **Submit for Approval**. Once your blogs are categorized, you can add a Blog Categories Web Gadget (refer to 12.2) to your website and your visitors will be able to view a list of blog categories that they can use as filters.

5.6 Editing the Preferences of Blog Categories

1. Navigate to **Blog.**
2. Click on **Blog Subscriptions**.
3. Navigate to the category you would like to edit and click **Go**.
4. Select your preferences and click **Save Preferences**

6 Forms

6.1 Adding Forms

1. Navigate to **Forms from** Digital Workspace
2. Click on **+New Form** to open the **Form Editor**

   Step 1: Setup your form

   a. Fill in the **Form Title**, **Description**, and an **Email Address** to receive form responses. **Submission Button Text** will determine what should happen after the form is submitted (refer to 6.3) then click **Next Step**

   Step 2: Design your form - this is the part where you design the questions that you want to ask your clients

   a. Under **Add New Field**, there are seven types of fields
      i. **Email:** a field for email addresses
      ii. **Paragraph**: a field for longer answers (e.g. Do you have any feedback for us?)
      iii. **Checkboxes**: for questions that form submitters can select one or more answers
      iv. **Multiple Choice**: for questions that form submitters can select only one answer
      v. **Dropdown**: similar to Multiple Choice, designed for questions that have a long list of answers
      vi. **Website**: used to redirect the submitter to another webpage
      vii. **Text**: a field for short answers (e.g. Name, Phone)
   b. Under **Edit Field**, you will be able to configure:
      i. **Question**
      ii. **Description**
      iii. **Whether the question is required** (check the checkbox to make it required)
      iv. **Answer options** (for Checkbox, Multiple Choice, and Dropdown questions)
      v. **Character length limit** (for Text and Paragraph questions)
   c. Click **Next Step**

   Step 3: Add a confirmation email

   a. Fill in the email **From Name**, **From Address**, **Subject**, and **email content**
   b. If you do not want to send an email, check **Do not send a confirmation email**

   Note: For how to inject form answers into the confirmation email, refer to 6.4

3. Click on **Submit for Approval.** Once the form is approved, you will be able to add it to your

website (refer to 12.3)

4. If you want to edit the form, click on **Edit** to open the **Form Editor** and change the fields you want. Then click **Submit for Approval**.

6.2 Creating a Form Using Pre-Made Templates

1. Navigate to **Forms**
2. Click on **+ Use a Template**. This will present you with a list of all the template categories
3. If you want to **preview** a template, click on **Preview** beside the Form Title
4. Select a template and click on **Use Template**.
5. The **Form Editor** will up and all the pre-made fields will already be filled out by Marketing
6. Edit the form like how you would create a new form (refer to 6.1)

6.3 Setting Form Completion Behavior

1. Navigate to **Forms**
2. Click on **+New Form** or **Edit** beside the form you would like to edit. This will open the **Form Editor**. From there, you can set one of two options to occur once a visitor has completed your form:

   Option 1: Redirect visitors to a webpage after they submit the form

   a. While in **Step 1: Setup Your Form**, check **Redirect them to a webpage**
   b. Type in the URL of the webpage you would like to redirect them to

   Option 2: Display a message after they submit the form

   a. While in **Step 1: Setup Your Form**, check **Display a message**
   b. Type in the message
3. When you finish editing the form, click on **Submit for Approval**

6.4 Adding a Confirmation Email

1. Navigate to **Forms**
2. Click on the **edit** button beside the form you would like to edit, this will open the **Form Editor**. If you would like to create a new form, click on **Add New Form** to open the **Form Editor**
3. While in **Step 3: Add a confirmation email**, type in your email **From Name**, **From Address**, **Subject**, and **Email Content**.
4. To inject a form answer into the confirmation email, type in two curly braces around the question that the answer corresponds to (e.g. If the question is First Name, type in {{First Name}} in the email body)
5. Click on **Submit for Approval**

Sample Confirmation Email:

Hello {{First Name}} {{Last Name}},

Thank you for scheduling a meeting with our web administrator. Your appointment is on

{{Appointment Date}} at {{Appointment Time}}. We will contact you at {{Phone Number}} prior to the meeting to confirm the appointment.

Regards,

Joe web administrator's Team

6.5 Tabulating Form Responses

1. Navigate to **Forms**
2. Click on beside a form and a .CSV file of all form responses for the form will download to your computer

7 Updates

7.1 Creating an Update

1. Navigate to **Updates**
2. Click on **+Update** in the top right corner to open the Updates Editor
3. Fill in the fields (e.g. Title, Excerpt, Scheduled Date, Link, etc.) Note: Link title is the clickable link name
4. Click on **Save changes**
5. Click on to **submit** it for approval. Once the update is approved, it will be visible on your website
6. If you want to edit an Update, click and edit the fields you want, then click **Save changes**

7.2 Scheduling Updates

1. Navigate to **Updates**
2. Click on **+Update** or of the update you want to edit to up the **Updates Editor**
3. Type in or click on the date and time that you want to publish your update under **Scheduled Date**
4. Click on **Save changes**
5. Click on to **submit** it for approval

7.3 Adding an External Link

1. Navigate to **Updates**
2. Click on **+Update** or of the update you want to edit to up the **Updates Editor**
3. Select whether you would like to **upload** a file or add an **External Link** from the **Type** dropdown
    a. For **External Link**, simply copy a paste a link into the **Link** dialogue box and add a **Link Title**. Note: The Link Title is what will be displayed to your audience instead of the website Link itself
    b. For **File Upload**, select **Choose File** and select a file from your computer. After the upload is complete add a **Link Title** to be displayed as text linking to your file.

4. Click on **Save changes**
5. Click on ☑ to **submit** it for approval

7.4 Tagging Updates

1. Navigate to **Updates**
2. Click on **+Update** or ✎ of the update you want to edit to open the **Updates Editor**
3. Type in the **Tags** field and use commas to separate tags. Tip: Digital Agent remembers previous tags that you have created and gives suggestions as you type
4. Click on **Save Changes**
5. Click on ☑ to **submit** it for approval

7.5 Categorizing Updates

1. Navigate to **Updates**
2. Click on **+Update** or ✎ of the update you want to edit to open the **Updates Editor**
3. Check off the appropriate **categories**
4. Click on **Save changes**
5. Click on ☑ to **submit** it for approval

8 Polls

The **Poll Manager** is the central repository for all of your polls and allows you to create, edit and publish polls.

8.1 Creating a Poll

1. Navigate to **Polls**
2. Click on **Add Poll** in the top right corner to open the Poll Editor
3. Fill in the Poll **Name**, **Description** and **Answer** options
4. Click **Add Answer** to add more answer options
5. Click on **Submit for Approval.** Once the poll post is approved, it will be visible on your website (refer to 12.6)
6. If you want to edit a Poll, click **Edit** and edit the fields you want, then click **Submit for Approval**

8.2 Viewing Poll Responses

1. Navigate to **Polls**
2. Click on ▤ to open the **Poll Results**
3. Here you can view the amount of votes each possible answer has received as a number and a percentage of the total votes cast
4. To Exit this screen, click **Close**

9 Events

The Event Manager is the central repository for all of your events and allows you to create, edit and publish events.

9.1 Creating an Event

1. Navigate to **Events** from Digital Workspace
2. Click on **+ Add Event** to open the Events Editor
3. Fill in the fields (e.g. Name, Description, RSVP Link, Location, etc.) Note: the recommended length of the description is 180 characters
4. Click on **Submit for Approval**. Once the Event is approved, it will be visible on your website (refer to 12.4)
5. If you want to edit an Event, click **Edit** and edit the fields you want, then click **Submit for Approval**

9.2 Adding and Editing Date and Time

1. Navigate to **Events**
2. Click on **+ Add Event** or **Edit** of the Event you want to edit to open the **Events Editor**
3. Click the dialogue under **Event Start Date and Time** and select a date using the calendar and a time using the sliders. You can also specify the time zone your event will talk place in.
4. Click the dialogue under **Event End Date and Time** and select a date using the calendar and a time using the sliders
   Note: you can also opt to start the event at the current time by clicking Now in the start/ end date calendar
5. Click on **Submit for Approval**

9.3 Adding a Location

1. Navigate to **Events**
2. Click on **+ Add Event** or **Edit** of the Event you want to edit to open the **Events Editor**
3. Navigate to **Location** and enter the address of the Event
4. If the location field is left blank, the message “Location to Be Determined” will be displayed on your website
5. When finished click on **Submit for Approval**

9.4 Adding a Photo

1. Navigate to **Events**
2. Click on **+ Add Event** or **Edit** of the Event you want to edit to open the **Events Editor**
3. Navigate to **Upload Image** and click **Choose File** to select a file from your computer
4. Once the upload is complete click on **Submit for Approval**

10 Recycle Bin

10.1 Restoring items

You can restore team members and web pages from the **Recycle Bin**.

1. Navigate to **Recycle Bin**
    a. To restore a single item, click on **Restore** beside the item
    b. To restore multiple items, select the **checkboxes** beside the items, and click on **Restore Selected.** Tip: selecting the checkbox beside the data grid title **Item Name** will select all the deleted items.
2. **Confirm** the restoration

10.2 Purging Items

1. Navigate to **Recycle Bin**
    a. To purge a single item, click on **Purge** beside the item
    b. To purge multiple items, select the **checkboxes** beside the items, and click on **Purge Selected.** Tip: selecting the checkbox beside the data grid title **Item Name** will select all the deleted items.
2. A window will open to ask for your confirmation, type in **PURGE** in all capitals and click on **Confirm**.

11 Web Content Management

11.1 Creating New Web Content

1. While in **My Website**, navigate to the page that you would to place your content on
2. Click on **Add** then select **New Content**, and a piece of content with some default text will be added to the top of the current page
1. Click on **Options** in the upper right hand corner of the content, then select **Edit** from the dropdown
3. The **Content Editor** will open up with the following features:
    a. **Toolbar**: the section at the top of the editor that contains grouped menu buttons that grant you access to a number of functions. For a detailed breakdown of the toolbar, refer to Appendix A.
    b. **Editing Area**: the space below the Toolbar where you can add text and pictures/videos. Tip: If you find that the Editing Area is too small to work within, hold the black triangle in the bottom right (just above the Submit for Approval button) to extend the length of the Content Editor.
    c. **Context Menu**: a small pop-up that appears upon right-clicking within the Editing Area. You can cut, copy and paste using the Context Menu.
    d. **Elements Path**: located at the bottom of the Content Editor. This feature displays HTML elements of the content.
4. When you are finished editing your content, you can either choose to:

a. **Save As Draft**: your content will be saved and you can continue editing it on a later date. The content status will become **Draft**.
b. **Submit for Approval**: you will submit what you have edited for approval and your content status will become **Pending**. Note: Editing and saving the content after submitting it will cancel the approval process.

11.2 Reusing Web Content

1. While in **My Website**, navigate to the page that you would to place your content on
2. Click on **Browse**, then select **Personal Library** from the dropdown. This will take you to all the web content that you have created regardless of what status it has.
3. Click on **Preview** beside a content title to view the content
4. Click on **Add to Page** beside a content title and the content will be added to the current web page. If the content has already been approved, you do not need to submit it again. It will be visible right away.

11.3 Adding Pre-Approved Content

1. While in **My Website**, navigate to the page that you would to place Pre-Approved Content on
2. Click on **Browse**, then select **Marketing Library** from the dropdown
3. If you do not have access to a marketing category, click on **Request Access**. When you are granted access, the category will be labeled as **Access Granted**
4. Click on **Preview** beside a content title to view the content
5. Click on **Add to Page** next to the content that you want to add, and the Pre-Approved Content will be added to the current web page. You can drag and drop the content anywhere on the page based on the page layout

11.4 Dragging and Dropping Content

After adding content and Web Gadgets to your website, you will be able to drag and drop it anywhere on the page based on the **page layout** (page layout is defined by the page template you choose. For how to change your page template, refer to 4.1). To move a content box (or Web Gadget):

1. **Click and hold** ✥ in the upper right-hand corner
2. **Drag** it to the desired position. You will notice a **blue line** indicating the position of the content, and guides showing you possible positions for content
3. **Release** the content box (or Web Gadget)

11.5 Translating Your Site to Another Language

When you activate another locale for your website (refer to 2.4), a copy of the English site is automatically created. Anything that you make on the English site (e.g. Web Content, Blog Post, etc.) will be duplicated on all the other sites. For your content to be in another language, you will have to manually translate all the content by:

1. Selecting **Options** on the piece of content that you want to change and chose **Edit** from the dropdown
2. **Delete** all the English content and **replace** it with the translated content
3. Click either **Save As Draft** if you want to continue creating that piece of content on a later date or **Submit for Approval** to submit your content for approval to be published onto your website

11.6 Explaining the Compliance Features

You can see the status of your content when you are in **Draft Mode**. There are 4 different statuses that your content can have: **Draft, Pending, Approved** and **Rejected.**

- **Draft**: when you saved your content by clicking **Save As Draft**, it will be given the draft status and will not be seen by your website visitors
- **Pending**: once you are satisfied with your content and have clicked **Submit for Approval**, your content will be submitted for approval by your company's Compliance Officers. You will receive an email once the status of your content changes.
- **Approved**: if your content has been approved, it will automatically become available for your website audience to read
- **Rejected**: if your content is rejected, it will not show up on your website but it will be visible in Draft Mode for you to edit. When your content has been rejected, the Compliance Officer may have left comments pertaining to why they rejected it. In order to read these comments, go to ☰ and select **Comments** from the dropdown

11.7 Embedded Content

1. Navigate to **My Website**.
2. To add the content on a page on your website;
   - Click **+Add**
   - Click **New Content**
   - Go to **Options** associated with the new content, use the dropdown and click **Edit**
   - Click the video embedded content icon
3. When you finish editing the content, click **Save Draft** or **Submit for Approval**

12 Web Gadgets

12.1 Adding Blog Archive

The Blog Archive Web Gadget allows you to show a list of archived blogs sorted by month.

4. While in **My Website**, navigate to the page that you would to place the Web Gadget on
5. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
6. Select **Blog Archive** and click **Add**. The Web Gadget will be added to the current web page. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.2 Adding Blog Categories

The Blog Categories Web Gadget displays a list of categories containing blog posts that your visitors can use as filters. The categories are the same ones that you would set when creating or editing a blog post (refer to 5.5).

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **Blog Categories** and click **Add**. The Web Gadget will be added to the current web page
4. Configure the **Web Gadget settings**, then click **save**. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.3 Adding Custom Forms

The Custom Forms Web Gadget allows you to choose from a list of approved forms you've made to get feedback from your website's visitors. Every website should have a call to action in a visible or prominent location. This gadget is flexible enough to create forms for a "get a quote" to call action, gather visitor's website or even submit customer testimonial.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **Custom Forms** and click **Add**. The Web Gadget will be added to the current web page
4. Select an approved form from the drop down, then click **save**. You can also **drag and drop** the form anywhere on the page based on the page's layout.

12.4 Adding Events

The Events Web Gadget allows you to choose from a list of approved events you can display on your website to advertise to your audience.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **Events** and click **Add**. The Web Gadget will be added to the current web page
4. Select an approved event from the drop down, then click **save**. You can also **drag and drop** the event anywhere on the page based on the page's layout.

12.5 Adding Latest Blog Posts

The Latest Blog Posts Web Gadget enables you to display your latest blog posts to your website's visitors.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Add**, then select **Web Gadgets** from the dropdown. This will bring up a window that

provides you with a listing of all the Web Gadgets.

3. Select **Latest Blog Posts** and click **Add**. The Web Gadget will be added to the current web page
4. Configure the **Web Gadget settings**, then click **save**. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.6 Adding Polls

The Polls Web Gadget allows you to choose from a list of approved polls you can publish to your website and allow site visitors to vote on polls.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **Polls** and click **Add**. The Web Gadget will be added to the current web page
4. Select an approved poll from the drop down, then click **save**. You can also **drag and drop** the poll anywhere on the page based on the page's layout.

12.7 Adding My Biography

This Web Gadget is an easy and versatile way to display your biography to your visitors.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **My biography** and click **Add**. The Web Gadget will be added to the current web page
4. Select a profile, then check the checkboxes beside the profile information you want to display, click on **save**. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.8 Adding My Contact Map

The contact map gadget uses the address from your approved profile and automatically creates a map based on the address. Using this gadget gives you the ability to post your contact map as many times as you like without additional compliance reviews.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **My Contact Map** and click **+Add**. The Web Gadget will be added to the current web page
4. Fill in a **Title** for your team and check the checkboxes beside the information that you want to display, click on **Save**. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.9 Adding My Team

The My Team gadget enables web administrators to display profile information for all their team members on their websites.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **My Team** and click **+Add**. The Web Gadget will be added to the current web page
4. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.10 Adding Pre-Approved Profiles

This gadget enables web administrators to display profile information for all their team members on their websites.

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **Pre-Approved Profiles** and click **+Add**. The Web Gadget will be added to the current web page
4. Fill in and select the required fields for your profile, click **Save**. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.11 Adding Mailing List Subscribe

This widget allows your website visitors to subscribe to a mailing list of your choice

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.
3. Select **Mailing List Subscribe** and click **Add**. The Web Gadget will be added to the current web page
4. Configure the mailing list and then click on **Save**. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout

12.12 Adding Updates

This Web Gadget allows your visitors to view Updates created by the Marketing Team

1. While in **My Website**, navigate to the page that you would to place the Web Gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the Web Gadgets.

3. Select **Updates** and click **Add**. The Web Gadget will be added to the current web page
4. Configure the update and then click on **Save**. You can also **drag and drop** the Web Gadget anywhere on the page based on the page's layout.

12.13 Adding Web Campaigns

This Web Gadget is an easy and versatile way to display your update to your visitors

1. While in **My Website**, navigate to the page that you would place the web gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the web gadgets
3. Select **Website Campaign** and click **Add**. The web gadget will be added to the current web page
4. Select a website campaign from the drop down and then click on **Save**. You can **drag and drop** the web gadget anywhere on the page based on the page's layout

12.14 Adding Biography Roll

1. While in **My Website**, navigate to the page that you would place the web gadget on
2. Click on **Browse**, then select **Web Gadgets** from the dropdown. This will bring up a window that provides you with a listing of all the web gadgets
3. Select **Biography Roll** and click **Add**. The web gadget will be added to the current web page
4. Add a title to the widget and then click on **Save**.

12.15 Widget Summary

Widget	Function
Calculators	Displays calculators for **Auto Loan, Bank Loan, Credit Card, Saving/Retirement**.
Blog Archive	Displays a list of Blogs sorted by month. Must have at least 1 blog for anything to display.
Blog Categories	Displays a list of blogs organized by categories. Categories are created as you allocate a blog to the category.
Custom Forms	Displays a form. Must create at least 1 form in **Forms** for form names to show up in the drop-down.
Events	Displays series of upcoming/previous events. Must create at least one event for anything to show.
Events Calendar	Displays a monthly calendar view. Must have events scheduled for any events to display in the calendar
Latest Blog Post	Displays the latest blog post.

Polls	Displays a poll. Polls must be created beforehand for it to show up when adding a Polls widget.
Website Campaign	Displays a piece of web content that is created by Marketing User. Must have pre-made web content that is created by a Marketing User in the selected hub.
My Biography	Displays your basic info.
My Contact Information/My Office Information	Displays your work/contact info.
My Contact Map	Displays a map of your work address.
My Team	Displays all of your team members and their profile information.
Mailing List Subscribe	Displays a form that you can fill out to subscribe yourself into the newsletter.
Call to Action	Displays the latest update.
Updates	Displays a series of updates based on your preference.
Contact Summary	Displays basic contact info.
Pre-approved Profiles	Displays someone's profile. Must be created by a Marketing User for any profiles to appear.

13 Campaign Manager

13.1 Adding Single Subscribers to a Mailing List

1. Navigate to **Campaign Manager.**
2. Select the **Mailing List** tab.
3. Click **Create List** to open the create mailing list window.
4. Fill in the required fields then click **+Create List**.
5. Click **Add Contacts**
6. Select **Add a Single Subscriber**
7. Fill out the subscriber's information, the only required field is Email Address
8. Check the **I confirm that I have received consent to send email to the email address that I am adding** box
9. Click **Save Changes**

13.2 Import List

1. Navigate to **Campaign Manager.**
2. Select the **Mailing List** tab.
3. Click **Create List** to open the create mailing list window.
4. Fill in the required fields then click **+Create List**.
5. Click **Add Contacts**

6. Select **Import List**
7. In **Step 1: Import List**, click the File Upload box to open your file browser
8. Select the file you would like to upload (.csv .xlsx .xls are all supported file types)
9. Check the "I confirm that I have consent to send emails to all of the email addresses on my Mailing List" box
10. Click **Next Step**, the system will now process a preview of your spreadsheet
11. In **Step 2: Map Fields**, in the first column **Map** select which columns you would like to upload to Digital Agent. A preview is available to show you what is in the columns
12. In the last column **Digital Agent Fields** select the available field in Digital Agent to map that column to
    - Note: Hub ID and Email are the minimum required fields to subscribe emails to lists
13. In **Step 3: Tags**, click or type or search for tags or create a new tag to add. All contacts being uploaded will be tagged with the tags selected in this step (this will help with segmentation later on)
14. After mapping all the desired fields click **Import**
15. A summary of changes will be sent to your inbox once processing is complete along with any errors that might have occurred. Please be patient as this might take time before all emails will appear in your list
16. Click **Go Back to Mailing List**

13.3 Editing a Subscriber

1. Navigate to **Campaign Manager**.
2. Click on the Mailing Lists tab.
3. Locate the subscriber you would like to edit and select **Edit** from the drop-down menu.
4. Under the **Actions** column, click **Go**.
5. You can edit the details of the subscriber.
6. When you are content with your changes, click **Save Changes**.

13.4 Tagging a Subscriber

1. Navigate to **Campaign Manager**.
2. Click on the Mailing Lists tab.
3. Locate the subscriber you would like to edit and select **Edit** from the drop-down menu.
4. Under the **Actions** column, click **Go**.
5. Click or type to search existing tags or create a new tag and add it to the subscriber
6. When you are content with your changes, click **Save Changes**.

13.5 Create a Segment

1. Navigate to the **Campaign Manager.**
2. Go to Mailing list tab.
3. Click on **Actions**
4. Select **Segments**
5. Click **Add Segment**

6. Enter a Segment Name to name this segment
7. There are two types of conditions
    a. **Default Conditions** – these are set by your system administrator and are mandatory, they cannot be removed
    b. **Customize** – these conditions are created by you to help create a unique segment within your mailing list
8. To create a condition follow these steps:
    a. Select whether you want the contacts to follow "any" or "all" of the conditions being created
        i. **Any** – means that as long as a contact matches at least one of the conditions created, they will be part of this segment
        ii. **All** – means that the contact has to match all of the conditions created to be part of this segment
    b. **Step 1**: Select tags as the field you would like to create a condition with
    c. **Step 2**: Select the logic option for this condition (contact **is** tagged, or contact **is not** tagged)
    d. **Step 3**: Enter the name of the tag you are using
    e. Click **Add Condition** to add contacts to this segment
    f. Contacts that follow all the conditions will display in the list
    g. If there is a contact that you don't want as part of the segment but matches the conditions created, click **Edit** in the actions column next to their name to edit tags associated to them.
9. Click **+ Save Changes** to save the segment

13.6 Edit a Segment

1. Navigate to the **Campaign Manager.**
2. Go to Mailing list tab.
3. Click on **Actions**
4. Select **Segments**
5. Click **Add Segment**
6. Enter a Segment Name to name this segment
7. There are two types of conditions
    a. **Default Conditions** – these are set by your system administrator and are mandatory, they cannot be removed
    b. **Customize** – these conditions are created by you to help create a unique segment within your mailing list
8. To create a condition follow these steps:
    a. Select whether you want the contacts to follow "any" or "all" of the conditions being created
        i. **Any** – means that as long as a contact matches at least one of the conditions created, they will be part of this segment

ii. **All** – means that the contact has to match all of the conditions created to be part of this segment

b. **Step 1**: Select tags as the field you would like to create a condition with

c. **Step 2**: Select the logic option for this condition (contact **is** tagged, or contact **is not** tagged)

d. **Step 3**: Enter the name of the tag you are using

e. Click **Add Condition** to add contacts to this segment

f. Contacts that follow all the conditions will display in the list

g. If there is a contact that you don't want as part of the segment but matches the conditions created, click **Edit** in the actions column next to their name to edit tags associated to them.

9. Click **+ Save Changes** to save the segment

13.7 Editing the Mailing List Name

1. Navigate to **Campaign Manager**.
2. Click on the Mailing Lists tab.
3. Click on ✎ to edit the title
4. Click **Save** to save the name of the mailing list

13.8 Managing Campaigns

1. Navigate to **Campaign Manager**
2. This view displays all campaigns in a timeline view, this includes marketing automatic campaigns and personal custom campaigns.
3. Clicking on the filters on the left will filter the campaigns displayed in the timeline
   a. **View all** – will display all campaign types of all statuses
   b. **Scheduled** – will only display scheduled campaigns that have not yet been sent
   c. **Draft / Paused** – will only display campaigns that are in draft mode or have been paused
   d. **Sent** – will only display sent campaigns
4. You can also filter by:
   a. **Custom** – campaigns that have been created by you
   b. **Automated** – campaigns that have been created by marketing and you have opted into
5. Filter by Segments
   a. This will filter out what campaigns a certain segment has been sent
6. Campaign Actions:
   a. **Custom Campaigns** – if you hover over a campaign, a dropdown will appear that allows you to perform certain actions:
      i. **Pause** – you can pause any campaign that has been scheduled, this will stop the campaign from being sent out until you reschedule it
      ii. **Edit** – you can edit any campaign at any time
      iii. **Delete** – this will stop the campaign and remove it from the timeline

iv. **Preview** – you can view the campaign, what content was selected and details of the campaign
v. **Campaign Metrics** – show basic metrics such as clicks, opens, and bounces
NOTE: after the campaign has sent, you can only preview and view campaign metrics

b. **Automated Campaigns** – if you hover over a campaign, a dropdown will appear that allows you perform certain actions:
   i. **Preview** - you can view the campaign, what content was selected and details of the campaign
   ii. **Edit Segments** – you can change the segments you are sending this campaign to until the scheduled date and time occur
   iii. **Personal Message** - edit your personal message, these changes will then go through workflow for review
   iv. **Opt-out** – click this to opt out of this edition of the campaign
   v. **Download PDF**
   vi. **Campaign Metrics** – show basic metrics such as clicks, opens, and bounces
   NOTE: after the campaign has sent, you can only preview and view campaign metrics

13.9 Opting into an Automatic Campaign

1. Navigate to **Campaign Manager**.
2. Click **Automatic Campaigns** in Campaign Manager banner and the automatic campaigns window will open. Here you can view all the different campaigns that have been written and pre-approved by your marketing department.
3. Select the campaign you wish to send out and click **Start** under the Actions column.
4. Select the Segments you would like to send this newsletter to and click **Save**.

13.10 Unsubscribing from Mailing List

1. Navigate to the **Campaign Manager.**
2. Go to Mailing list tab.
3. Click on the name of the mailing list you would like to view and locate the subscriber who you would like to unsubscribe from your mailing list.
4. Select **Unsubscribe** from the drop-down menu.

13.11 Downloading My Mailing List

1. Navigate to the **Campaign Manager.**
2. Go to Mailing list tab.
3. Click on **Actions**
4. Select **Download List**

13.12 Bulk Unsubscribe

10. Navigate to the **Campaign Manager.**
11. Go to Mailing list tab.
12. Click on **Actions**
13. Select **Bulk Unsubscribe**
14. Copy and Paste a list of emails (one email per line) into the text box
    - Note: Once these emails are unsubscribed, the subscriber must manually subscribe themselves to be re-subscribed to the list
15. Click **Unsubscribe**
16. In the confirmation box type **UNSUBSCRIBE**
17. Click **Yes, Unsubscribe these emails**
18. A summary of changes will be sent to your inbox once processing is complete along with any errors that might have occurred. Please be patient as it might take time before all emails will appear in your list
19. Click **Go Back to Mailing List**

13.13 Notification Settings

1. Navigate to the **Campaign Manager.**
2. Go to Mailing list tab.
3. Click on **Settings**
4. Click **+ Add Notification Email**
5. Enter an email address that you want notified when subscribers join or leave the list.
6. Click **Save**

13.14 Custom Email Campaigns

1. Navigate to **Campaign Manager**.
2. Click **+ Create Custom**
3. To set up the custom email campaign follow these steps:
    a. **Step 1**: Set up your newsletter
        i. Select your newsletter language – this email will only send to subscribers who have this language set as their language preference and within your selected recipients
        ii. Give your Newsletter a title
        iii. Give your newsletter an email subject line
        iv. Select a from email – this is the email that your recipients will see it is sent from
        v. Select your recipient, the options are:
            1. **All Contacts** – will send to everyone on your mailing list
            2. **Specific Contacts** – hand pick specific people you would like to send to
            3. **Segments**- these are the segments that were created by you
        vi. Click **Next Step**
    b. **Step 2**: Pick a template
        i. Click **Next Step**

c. **Step 3**: Schedule – this will also determine what content you can choose to include in your email, anything that is not published before your send date/time will not appear in the next step
    i. You can schedule your newsletter for a future date and time, or
    ii. You can send it now (it will send within 10 minutes of you saving this setup)
    iii. Click **Next Step**
d. **Step 4**: Add articles
    i. Select which blog posts or updates you would like to include in this email. All published marketing and personal content is available for you to select. As you select the content, the preview on the right side will visually display how your email will look like.
    ii. There is an option to send a draft preview to an inbox to get a real preview of the email. Type in one or multiple emails, then click Send Preview
    iii. Click **Next Step**
e. Step 5: Summary
    i. Review all of information in the summary
    ii. Click **Save as Draft** or **Schedule and Send**

4. The scheduled email will send at the designated time

14 Content Collection

14.1 Adding Content

1. Navigate to the **Content Collections** on the Digital Workspace.
2. Click on **+Add Content**.
3. Choose the pieces of content you would like to add by selecting the checkboxes.
4. Click **Add to Collection**.
5. Click **Save all Changes**.

14.2 Arranging Content

1. Navigate to **Content Collections** on the Digital Workspace.
2. Click **Edit Display Order**.
3. Use the cross icon on the very left side of each row to change the display order of the content.
4. Click **Save All Changes**.
5. Click **Save All Changes** a second time to save the collection.

14.3 Creating a Content Collection

1. Navigate to the **Content Collections** on the Digital Workspace.
2. Click on **+Add Content**.
3. Fill in the **Collection Title**.
4. Click **Save All Changes** to save the collection.

14.4 Removing Content

1. Navigate to the **Content Collections** on the Digital Workspace.
2. Click on **Remove** on the right side of each row with content to remove that piece of content from the collection.
3. Click **Save All Changes**.

Appendix A - The Content Editor Toolbar

1 Section 1 How to Cut, Copy, and Paste

1.1 Cut

To cut a text fragment, start with selecting it. When the text is selected, you can cut it using one of the following methods:

- Press  on the toolbar
- Open the **Edit Content Box** context menu for the selected words by pressing the **right mouse button**, the **Menu/Application** key and choose the **Cut** command
- Use the **Ctrl+X** shortcut on your keyboard

1.2 Copy

To copy a text fragment, start with selecting it. When the text is selected, you can copy it using one of the following methods:

- Press  on the toolbar
- Open the **Edit Content Box** context menu for the selected words by pressing the **right mouse button**, the **Menu/Application** key and choose the **Copy** command
- Use the **Ctrl+C** shortcut on your keyboard

1.3 Paste

To paste a text fragment, start with cutting it or copying the text from another place and then choosing one of the below options:

- Press  on the toolbar
- Open the **Edit Content Box** context menu for the selected fragment by pressing the **right mouse button**, the **Menu/Application** key and choose the **Paste** command
- Use the **Ctrl+V** shortcut on your keyboard

2 Section 2 How to Undo and Redo Changes

2.1 Undo

The Undo feature is a quick way to cancel the recently introduced change and restore your content to a previous state. In order to revert the last action, activate the Undo command by either:

- Pressing  on the toolbar
- Pressing **Ctrl+Z** on your keyboard.

2.2 Redo

The Redo feature lets you revert the last undo operation. The document returns to the state it was in before you performed the undo. In order to revert the last undo operation, activate the Redo command by either:

- Pressing on toolbar
- Pressing **Ctrl+Y** on your keyboard

3 Section 3 How to Style Your Text

3.1 Bold, Italic & Underline

These three font styles are used constantly in both print and online documents. To turn the style on, press the button or use the respective keyboard shortcut. To turn it off, use the button or a keyboard shortcut again.

- To write in bold (i.e. using thicker letters), press on the toolbar or use the **Ctrl+B** keyboard shortcut
- To write in italics (i.e. using slanted letters), press on the toolbar or use the **Ctrl+I** keyboard shortcut
- To underline the text (i.e. draw a horizontal line underneath the letters), press on the toolbar or use the **Ctrl+U** keyboard shortcut. Remember that the underline style will also be applied to all white space of the selected fragment.

3.2 Text Colour

- To choose a color, select a text fragment and press on the toolbar. The Text Color drop-down menu that will open lets you select a color from a basic palette of 40 shades.
- If the color that you are after is not included in the basic palette, click the More Colors option in the drop-down menu. The Select color dialogue window that will open lets you choose a color from an extended palette. You can either select a desired shade with your mouse or enter the RGB colour value into the text box, using one of the following formats:
    - **RGB** (nn, nn, nn): nn is a numeric value on a scale from 0 to 255 that represents the red, green and blue channel
    - **#nnnnnn**: the n letters stand for the three pairs of hex colour values that represents the red, green and blue channel

3.3 Paragraph Format

Paragraph formats are pre-defined block-level combinations of various formatting options that keep it simple when presenting a uniform series of text. When selecting a **Paragraph Format**, you won't need to change a font, its size or the text and background color separately.

To choose a paragraph format, place the cursor inside the block-level element and press Normal on the toolbar. The **Paragraph Format** drop-down list contains a number of pre-defined block-level styles that you can use. To make the choice easier, the format names are displayed in a format that they represent, giving you a preview of what the text will look like.

4 Section 4 How to Control the layout of your text

4.1 Text Indentation

Indentation defines the spacing between the beginning of a block-level element and the left margin or gutter in all languages with left to right text direction.

- **Increasing Indentation**: to increase the indentation of the element, click . The block-level element containing the cursor will be indented with one tabulator length.
- **Decreasing Indentation**: to decrease the indentation of the element, click . The indentation of a block-level element containing the cursor will decrease by one tabulator length.
- **Indentation Levels**: the **Edit Content Box** supports multiple indentation levels per element. To indent an element even further, click as many times as necessary.

4.2 Block Quote

Block quote is used for longer quotations that are distinguished from the main text by indentations on the left and right side. It is recommended to use this type of formatting when the quoted text consists of several lines or at least 100 words. To add a block quotation to your text:

1. Click on within the toolbar. Once added, the block quote formatting appears in the document on the location of the cursor.

4.3 Text Alignment

Text alignment determines the placement of text relative to the page (or the editing area).

- **Align Left**: to align the text left, click . The text will flow to the left margin or gutter and there will be some space left on the right when a word does not fit the line.
- **Center**: to center the text, click . The text will align symmetrically and there will be some space left on both sides when a word does not fit the line.
- **Align Right**: to align the text right, click . The text will flow to the right margin or gutter and there will be some space on the left when a word does not fit the line.
- **Justify**: to justify the text, click . The text will stretch from one side of the margin to the other and there will be no space left on either of the sides with additional spacing applied between letters or words.

5 Section 5 How to Create and Manage a Bulleted List

5.1 Creating a Bulleted List

To create a bulleted list, click on the toolbar. A default list marker will appear at the beginning of the line of text that contains the cursor and the line will become indented. If you want to add further list items, press Enter on your keyboard. The cursor will move to the next line with a list marker placed at its beginning. The list is continued automatically as long as you press Enter at the end of a line. If you want to suppress list creation, press Enter in an empty line with a list marker or click the again. The cursor will then move to an un-indented paragraph. Another method of adding a bulleted list is to select one or more paragraphs and press the button on the toolbar. Each paragraph will then become a separate list item.

5.2 Bulleted List Properties

You can customize the appearance of the bulleted list and modify the list marker. In order to change the list style, open the **List Context Menu** by clicking the right mouse button on a list item and choose the **Bulleted List Properties** menu option.

The Bulleted List Properties dialogue window lets you configure the appearance of the list marker. The Type drop-down list contains the following options:

- **Circle:** the list marker becomes a round shape that is empty in the middle
- **Disc**: the list marker becomes a round shape filled in the middle
- **Square**: the list marker becomes a four-sided shape filled in the middle

5.3 Nested Bulleted Lists

To create a nested bulleted list, use the **Increase Indent** feature on the toolbar. Place the cursor in the line that should start the nested list and press on the toolbar. The list item will become indented and the list marker will change. The next item added to the list will have the same indentation as the previous one and thus become a part of the nested list.

If you want to end the nested list and return to the previous indentation level, place the cursor in the line that should be a continuation of the previous list and press the **Decrease Indent** button ( ). The indentation of the list item will decrease and the list marker will change back to the marker for a list of a higher level.

5.4 Removing Bulleted Lists

If you want to remove list formatting, leaving the text of the list items intact, select the list in the document and press on the toolbar. The list markers and indentation will be removed and each of the former list items will become a paragraph.

6 Section 6 How to Create and Manage Numbered Lists

6.1 Creating a Numbered List

To create a numbered list, press the button on the toolbar. A default numbered list marker will appear at the beginning of the line of text that contains the cursor and the line will become indented. If you want to add further list items, press **Enter** on your keyboard. The cursor will move to the next line with a list marker placed at its beginning. The list is continued automatically as long as you press **Enter** at the end of a line. If you want to suppress list creation, press **Enter** in an empty line with a list marker or click the button again. The cursor will then move to the next, unindented paragraph.

6.2 Numbered List Properties

You can customize the appearance of the numbered list, its starting value, and the list marker. In order to change the list style, open the **List Context Menu** by clicking the right mouse button on a list item and choose the **Numbered List Properties** menu option.

The **Numbered List Properties** dialogue window lets you configure the starting value and the list marker type. A numbered list can use decimal numbers, Roman numerals, or letters of the alphabet, in either lower or upper case.

Below is an overview of all Numbered List Properties dialogue window elements:

- **Start**: the starting value for the list that will be used in the first list item.
- **Type**: the type of the list marker. The following options are available from the drop-down list:
  - **Lower Roman** (e.g. i, ii, iii, iv, v, etc.)
  - **Upper Roman** (e.g. I, II, III, IV, V, etc.)
  - **Lower Alpha** (e.g. a, b, c, d, e, etc.)
  - **Upper Alpha** (e.g. A, B, C, D, E, etc.)
  - **Decimal** (e.g. 1, 2, 3, 4, 5, etc.)

6.3 Nesting Numbered Lists

To create a nested numbered list, place the cursor in the line that should start the nested list and press the **Increase Indent** button ( ) on the toolbar. The list item will become indented and the next item

added to the list will have the same indentation as the previous one, thus becoming a part of the nested list.

By default the nested numbered list will use the **Decimal** list marker type. To increase the readability of a structure of nested numbered lists, you can assign each nesting level a different list marker. To achieve this, open the **List Context Menu** by clicking the right mouse button on a list item, and choose the **Numbered List Properties** menu option. The type selected from the **Type** drop-down list will be used for all list items at this nesting level.

If you want to end a nested list and return to the previous indentation level, click on the **Decrease Indent** button ( ) and ensure you have the cursor placed in the line that should be a continuation of the previous list. The indentation of the list item will decrease and the list marker will change back to the marker for a list of a higher level.

6.4 Removing a Numbered List

If you want to remove list formatting, leaving the text of the list items intact, select the list in the document and click on the toolbar. The list markers and indentation will be removed and each list item will become a separate paragraph.

7 Section 7 How to use Content Templates

The **Edit Content Box** template button is a feature that lets one control the structure of their content and preserve consistency across multiple content boxes. Templates are pre-defined, ready-to-use forms with page layout, text formatting and styling as well as other elements.

To add one in your Content Box, click on the toolbar. The dialogue window will show a list of pre-defined templates that are available. Each template listed in the window contains a title, an image presenting the schematic outline of the template as well as its description. In order to select a template, choose it from the list in the Content Templates dialogue window and click once. The window will then close and the selected template will be added to the **Edit Content Box.**

The Content Templates dialogue window contains one configuration option, which is **Replace actual contents**. Leaving it checked means that the inserted template will also delete and replace the content entered previously into the **Edit Content Box** window. If you unintentionally remove the previous text using this option, you can always revert this operation by pressing on the toolbar.

If you leave the **Replace actual contents** option unchecked, the template will be inserted in the current position of the cursor in the **Edit Content Box**.

8 Section 8 How to Create Links

8.1 Link Feature

The **Link** feature is a powerful option that lets you add clickable hyperlinks or e-mail addresses to your documents, as well as control the way they look and function. To insert a link to your document, click  on the toolbar. If you want the link to be assigned to specific words, select them first. If no text is selected, the link URL or e-mail address will appear in the document as-is. The **Link** dialogue window that will open lets you choose the link type and configuration options pertaining to your choice. It contains the below two options:

- **Link Info**
- **Target** (this tab is only available for URL link type)

8.2 Link Info

The **Link Info** tab is the default tab that opens after you press  on the toolbar. It allows you to choose the link type as well as set the link protocol and URL.

Below is an overview of all **Link Info** tab elements:

- **Link Type**: the category of the link that will be inserted into the document. You can choose between the following options:
  - **URL**: the web address of any resource available in the Internet, like a website, a PDF document, or an image (e.g. http://example.com/about.html)
  - **Link to anchor in the text**: an internal link pointing the reader to a designated point in your document (e.g. #anchor1)
  - **E-mail**: an e-mail address (e.g. my.name@domain.com)
- **Protocol**: the communication protocol used with the web address (i.e. http://, https://, ftp://, news://, or <other>)
- **URL**: the web address of the resource that the link is pointing to. It may be located on an external server that you can input here (e.g. http://example.com/about.html)
- **Browse Server**

8.3 Target

The **Target** tab is only available for the URL Link Type. It specifies the location where the link will open after you click it. By default, the target of the URL is not set and the link will open in the same browser window or tab as the document.

This tab contains a drop-down Target list that lets you choose the location where the link will open. The list contains the following options:

- **<not set>**: the default setting that opens the link in the same browser window or tab as the document
- **<frame>**: the setting that opens the link in the frame specified in the **Target Frame Name** text box. The text box is only visible after you choose **<frame>** as the target
- **<popup window>**: the setting that opens the link in the pop-up window specified in the **Popup Window Name** text box. The text box is only visible after you choose **<popup window>** as the target. If you choose to open the link in a pop-up window, you may configure some further options that control the appearance of the pop-up. Note: the users' browser settings might override these options and make the pop-up window appear in a standard new browser tab or window instead.
    - **Resizable**: whether the pop-up window may be resized
    - **Status bar**: whether the pop-up window will contain the status bar
    - **Location bar**: whether the pop-up window will contain the location bar
    - **Toolbar**: whether the pop-up window will contain the toolbar
    - **Menu bar**: the pop-up window will contain the menu bar
    - **Full screen**: whether the pop-up window will be maximized (i.e. full-screen)
    - **Scroll bars**: whether the pop-up window will contain the scroll bars
    - **Dependent**: whether the pop-up window will close when the window that opens it closes
    - **Width:** the width of the pop-up window
    - **Height**: the height of the pop-up window
    - **Left Position**: the offset of the pop-up window from the left side of the screen
    - **Top Position**: the offset of the pop-up window from the top of the screen
- **New Window (_blank)**: opens the link in a new window
- **Topmost Window (_top)**: opens the link in a window that is positioned on the top
- **Same Window (_self):** the setting that opens the link in the same window as the document
- **Parent Window (_parent)**: the setting that opens the link in the window that the document window is nested in

9 Section 9 How to Add Images to Your Website

1. To begin adding your image, you must first upload it into your folder for your website. Start by clicking  on the toolbar.
2. When the next window pops up, click the **Browse Server** button. This button will take you to your file folders for your website. For a picture to appear on your website, it has to be in the folder with your name on it.

3. Upload a picture from your computer into the folder by clicking the **Choose File** button on the bottom right of the window. This button will take you to a window with your documents.
4. Select the picture you wish to upload and click **Open**. This will take you back to the previous window.
5. Upload your picture into the folder by clicking the **Upload** button.
6. If your image is too large for the area of your website, you will have to **resize** the photo. This is done by changing the **width** and **height** values.
7. Click **Ok** and save your work by clicking either **Save As Draft** or **Submit for Approval**

10 Section 10 How to Add Documents to Your Website

1. Click  on the toolbar
2. When the next window pops up, click the **Browse Server** button. This button will take you to your file folders for your website. For a document to appear on your website, it has to be in the folder with your name on it.
3. Upload a document from your computer into the folder, click the **Choose File** button on the bottom right of the window. This button will take you to a window with your documents.
4. Select the document that you wish to upload and click **Open**.
5. Upload your document into the folder by clicking the **Upload** button
6. Click **Ok** and save your work by clicking either **Save As Draft** or **Submit for Approval**

11 Section 11 Subscripts and Superscripts

Subscripts

1. To create a subscript, start by going to the end of the word or number you would like to have a subscript.
2. Click on the toolbar
3. A small flashing cursor will come up and will allow you to type your subscript. When you are done, click again to end the subscript

Superscripts:

1. To create a superscript, start by going to the end of the word or number you would like to have a subscript.
2. Click on the toolbar
3. A small flashing cursor will come up and will allow you to type your superscript. When you are done, click again to end the subscript

12 Section 12 Find and Replace

The Find and Replace function allows you to locate words that you have written in your work to easily refer to a particular topic. Once you have located a word, you can substitute that word all the times that it comes up in your text with a new word of your choosing.

1. Click on the toolbar
2. To Find a word within your text, type it into the Find what box and click **Find.** If you click close you will see that every time that word has been written, it is now highlighted
3. If you want to change the word you have found every time it has been written in your text, open the Find and Replace window by clicking again and then click the **Replace** tab
4. In the replace box, type in the word you would like to switch the word you found with, then click **Replace All**
5. A window will pop up indicating the number of replacement occurrences. If you would like to replace another word then go back to set two and repeat. Otherwise, click **Close** to exit the window

13 Section 13 Spell Checker

S.C.A.Y.T: Spell Check As You Type

The toolbar also offers a built-in spell checker function that is convenient for proof reading and editing your work. As you type, if a word is misspelled it will be indicated with a red underline, to view suggestions as to how the word should be spelt, right click on the underlined word and a menu of suggestions will appear.

For Additional Spell Checker Options Click , and a drop-down menu will appear with the following options:

- **Disable SCAYT**: Turns on and off all functionality by clicking on and off
- **Options:** Gives more specific options for SCAYT to function under, such as:
    - Ignore All-Caps Words
    - Ignore Domain Names
    - Ignore Words with Mixed Case
    - Ignore Words with Numbers
- **Languages:** Allows you to select the language that Spell Checker will comply with
- **Dictionaries:** Allows you to create a custom dictionary with words spelt according to your company standards or language
- **About SCAYT**: Offers a link with more information about SCAYT functions
- **Check Spelling**: Opens a window with spell checker, grammar and thesaurus options and allows you to edit words directly in the window