Simpleview CMS
Adding New CMS Users & Assigning Permissions - Transcript

Making sure everyone has the access they need is vitally important to your organization.

As you have learned throughout this CMS course, you have many valuable assets and page content stored in your CMS and CRM. On top of that, you have your workflows for managing how and when the assets and content display on your website. You have a treasure trove of beautiful and creative web content in your CMS. And we want to help you manage and protect it!

You may have a whole team of people working with you to do all the work associated with your destination's website or websites. That's great news, but it comes with a word of caution. It can get **complicated** when many users work in your CMS. You may want to limit access for some users, to safeguard your website. To assist you in this effort, CMS offers permission-based user Roles.

In this lesson, we'll start by showing you how to set up user **Roles,** specifically those that limit access within your system. This way you can ensure that your files and pages are being accessed by the intended team members. We'll follow that up by creating a new user and assigning her that new user Role.

For demonstration purposes, let's say we recently added a new guest blogger program to our site. In order to save our team time, I want to allow bloggers limited access to the CMS, giving them editing/modifying rights but restricting their power to delete and publish.

Let's begin with clicking **Settings** in the left navigation and then selecting the **'Users'** option.

If you do not have access to the Settings, just follow along with the video lesson and refer to it as you complete the related lesson activities.

Next, choose '**Manage Roles**'. This opens a grid display listing all active user **Roles** in the CMS.

To add a new user Role in the system, select the ‘**Create New**’ button on top of the grid.

This first field, ‘**Clone from Existing Role’**, can be a timesaver when you need to create a role that is similar to another user Role. The field’s dropdown displays all existing User roles in your CMS.

The next field, ‘**Role Name**’, is required and should be a concise, descriptive title for your new Role. I’m going with the straightforward title of “Guest Blogger” for the Role Name.

Now, I’ll enter an internal description to help other CMS users on my team better understand which users should be assigned this role.

Next, you’ll see a build-a-sandwich type menu displaying all of the available **Role Permissions**.

Select the checkboxes, section by section, to assign specific permissions to the user **Role**. You can individually select each checkbox or use the ‘Check All’ button to select all permissions in that section.

It’s worth noting that after selecting a ‘Check All’ button, the button’s name will change to ‘Uncheck All’ and will function to remove the selected section permissions.

For my “Guest Blogger” Role, I will scroll to the ‘Asset Library - Images’ section and check the box for ‘Access’ to allow my guest bloggers to view and use Images in the Asset Library.

And, because I have the Public Relations Module add-on, I’ll scroll down further to the ‘Public Relations - Leisure Blog’ section. Here, I will check the ‘View Posts’ and ‘Modify Posts’ Permissions to give the guest bloggers additional access.

We aren’t going over all of the available Role Permissions in this lesson. Most of the checkboxes, though, use straightforward terms, and some have associated tooltips. You can always refer to the CMS Knowledgebase for more information.

Now, all I have to do is click ‘Save Changes’ and my new ‘Guest Blogger’ Role is live. I see it now on the Roles grid. If I needed to edit the permissions associated with my new Role, I just click the pencil icon and make adjustments.

Okay, now that this user Role is set up, the next step is to add our guest blogger to the CMS.

Again, this is really simple to do. I’ll just click the green arrow in the left navigation to open the slide panel and from there select the ‘**Manage Users**’ option. This action takes us to the Users grid which displays all CMS users.

If the user you want to add exists in your Simpleview CRM, you can use the ‘Sync User’ button. Once they appear in the list of Users, they can login into the CMS using their CRM credentials.

Since our new user is outside our organization, I’ll click the ‘Create New’ button on top of the grid to add my new guest blogger, Maya Rascon.

First, I’ll enter Maya’s email address. CMS sends the new user message to this email address. The email address also functions as the Username when logging into the CMS.

Next, I’ll enter her First and Last name.

The ‘Active’ toggle determines whether the new user is active (ON) or not (OFF) in the CMS.

It’s important to know that you **CANNOT delete a user from the CMS**. Instead, you will control your users’ access to the system with the ‘Active’ toggle. The CMS does not delete users because tracking functionality is tied to user history. If it were possible to delete a user from the platform, all historical data tied to that user’s account would be lost as well.

The CMS tracks when content is created, modified or deleted. And each content change is associated with the CMS User that made the update. This history is stored in your Settings under the User History option. Here you can see the system recorded the new user role I just created.

Going back to our new user, I still need to choose a user **Role**. In the ‘Role’ field, I’ll use the dropdown to select the Guest Blogger role I just created. Again, this user Role ensures that Maya -- and any other user with this Role -- can only access and work with the necessary areas and elements of the CMS platform.

Now, once I click the ‘Save Changes’ button, my new user, Maya, should receive an automated email from the CMS informing her of her new access to the platform and providing the initial login details and a temporary password.

Here’s a problem-solving tip: If a user is not able to access certain areas of the CMS that they **should** be able to access, you’ll want to check and adjust their user Role or the associated permissions.

That’s everything you need to know to add and manage your users in the CMS. Now you have the all-access path to CMS!

Simpleview CMS

Using the CMS Code Editor - Transcript

Do you understand that? Then this video is for you.

Because another tool you can access via the Settings icon is the CMS Code Editor. But first, let me explain what the Code Editor is.

This tool was created for **users who have Web programming knowledge** and want to customize their site beyond the modifications available within the Page Builder. Using Code Editor, these savvy users have the ability to edit your website's HTML, CSS and JavaScript.

However, it is important to note that any changes made in the Code Editor are a **revisions** to existing HTML, CSS or JavaScript.

Therefore, users accessing the Code Editor must have web programming experience. An unskilled user can break your site's design. **So please, always exercise caution when you using the Code Editor.**

Now, let's look at how it works.

Select the Settings icon in your left nav and click Sites. From there, select the site you wish to edit. In our case, we'll select 'Primary'. Next, click the 'Code Editor' option.

The platform takes you to the Code Editor grid displaying all code revisions that have **not been deployed** and published to your website.

If you want to create a new Code Revision, select the 'Create New' button at the top of the page. In doing so, you will see a new screen labeled 'Create New Revision' and a dropdown menu of available plugins in your CMS.

Once you select a Plugin from the list, a new dropdown menu labeled 'File' will appear. This will show all of the Plugin's available files that you can edit with the Code Editor. By selecting a Plugin's file, you will see all of its associated code, which you can edit within the CMS. We do recommend copying the original code and saving it locally before making any changes.

Once you have made all of your desired changes, simply select 'Save Changes'. Your revision should now appear in the main Code Editor screen.

After creating a Code Revision, you can preview it in a draft instance of your website. To do this, check the box next to the revision, or multiple revisions, you want to view and then select the 'Preview' button.

If you are happy with your Code Revision, you can deploy it to the live version of your website. To do so, select the 'Include' checkboxes associated with the Code Revision you want to deploy and then select the Deploy button.

A pop-up notification will appear notifying you that your changes will be published. If you decide you do not want to deploy, select the 'Cancel' button. If you are satisifed with your changes, select 'Ok'.

Once you select the Ok button, a new pop-up notification appears with a status bar showing you the status of the deployment process.

Once the status bar indicates that 100% of the data has been successfully copied to the live website, you can select 'View Live Site' to open your site for verification purposes.

Once you have deployed a Code Revision, you cannot reverse the action. Reverting any deployed revisions will require assistance from Simpleview developers, so keep that in mind.

The code is everywhere. It is all around us. Even now in this very room.

Simpleview CMS

Setting Up Page Redirects - Transcript

I'm sure your 404 page has a really clever message on it. But we don't want people there all the time, right? We want them back on your site, exploring all that your destination has to offer! So, let me **redirect** your attention to this lesson on setting up redirects!

The **Settings** section allows you to manage the link logic of your website through **Redirects**.

A redirect should be applied when a page is no longer published on your site. The redirect tells your website where to take visitors who are looking for the original URL.

When a page is inactive, a redirect points visitors and search engines toward a different URL. The Redirect feature makes sure that people do not end up seeing 404 pages on your website.

To access Redirects, click 'Settings' on the left navigation and then the 'Sites' option. You will see a list of all the websites that are managed with your CMS.

From there, select the site you wish to manage. You will now see the subsections of your chosen site. Click 'Redirects' to open up the Redirects grid where you can create, manage, and edit Redirects in your system.

The first column of the grid is the 'Action' column displaying all the action icons. The icons give you the ability to edit, delete, clone and view the history of a specific Redirect.

You are able to find specific Redirects by using the filter options to the right. You can easily search by Keyword, whether a Redirect is active or inactive, or by type.

If you want to create a new Redirect in your system, the first step is clicking the 'Create New' button at the top of the page. This will open up a new window where you will need to complete the following fields.

First, you need to make the Redirect Active. The 'Active' field defaults to 'ON', but you can toggle it to 'OFF' while you're working on the page. The 'ON' setting will enable the Redirect to be used on the assigned URLs or paths that are specified in the Redirect Form. However, if you toggle to 'OFF', the Redirect will serve as a draft and will not be used on the website.

Next, you need to determine which type of Redirect you want to create. Your options include 'Exact', 'Path' and 'Regex'.

If you want the Redirect to work only when the EXACT URL is entered in the browser's address bar, then select 'Exact'.

If you want the Redirect to work when the URL includes a marketing UTM code or website tracking tag, then select 'Path'.

If you have several URLs or paths with a similar structure that you want to redirect to a new URL or path, then you will likely need the 'Regex' type redirect.

Keep in mind, 'Regex' is an advanced option. We recommended communicating with your SEO advisor before proceeding with this type of redirect.

Let's say you have rebranded your destination and need to update all URLs that contain the old brand name. You can use a regex path to match URLs with the old brand name and then update them in bulk using the 'Regex' tool in your CMS.

Next, let's talk about your options in the **Code** field. From the dropdown menu, choose the type of status code you want to associate with your Redirect. The options may include 301 or 302.

A 301 code indicates that a page has permanently moved to a new location. This option is extremely beneficial if you are merging two websites and you want to ensure that links to outdated URLs are redirected to the correct pages. Ideally, this code is the best option available for implementing redirects on a website.

A 302 code indicates that a page has temporarily moved to a new location or is "under construction." It also tells search engines, such as Google, that the original page will be coming back and to continue to index it. However, you should only use this option if you have a specific and vetted use case, like holiday or restaurant week pages.

The sort field only comes into play with Regex type redirects, so in most cases, you can leave it empty.

Next, set the **date** and **time** when you want the CMS to use the Redirect on your website. If you do not set a **Start Date**, the system will immediately begin using the Redirect when its 'Active' field is toggled 'ON'.

Also set an **End Date**. This will determine the date and time you want the CMS to stop using the Redirect. If you **do not** choose set an End Date, the system will use the Redirect until you decide to manually delete it, set it to inactive or publish a new page with the same folder path.

Below the Start and End Date fields, you will use the '**Redirect From**' field. Enter the old path or Regex pattern **<u>from</u>** which your site's traffic should be redirected. This URL **must be inactive** in order for your redirect to work.

Then, in the '**Redirect To**' field, you will enter the **new** URL or path **<u>to</u>** which you want to redirect the old URL or path's traffic.

Finally, there is the **URL Tester**. This field allows you to test your Redirect and make sure its working.

Simply copy the content in the 'Redirect From' field and paste it into the 'URL Tester' field. If it is a valid Redirect, you will see a green check mark appear followed by an explanation on why the Redirect will work.

If the Redirect is not valid, you will see a red X followed by an explanation telling you why.

Once you complete all of the fields, click the 'Save Changes' button. The new Redirect will appear on the main Redirects grid. Or, to streamline your workflow when creating multiple Redirects, click the 'Save and New' button to go directly to a new Redirect form.

Just remember, the Redirect will only operate as expected if the previous page has been deactivated or no longer exists.

Well, now you can **redirect** your attention to the next element in your CMS course!

Simpleview CMS

Creating and Managing Tags - Transcript

Making sure you tag things in the correct way is important.

In this next set of videos, we are going over functionality related to the ‘Settings’ option in your left navigation.

We’ll start by going over creating and managing **CMS Tags**.

We discussed CMS Tags earlier in the course, but now we'll show you how these Tags can be managed in your CMS Settings.

Remember, CMS Tags benefit your website by organizing and connecting your content. If CMS Tags are applied effectively and consistently, your team can easily search for and find Nav Items, Assets and Content.

Click your left nav's 'Settings' section and select the 'CMS Tags' subsection. Once there, you should see a grid displaying your CMS Tags.

Each CMS Tag has three action icons: **Edit, Delete**, and a dropdown that offers **History**.

Edit allows you to update the Tag title. If you do, the change applies to all Assets and Items assigned to that Tag.

Delete will remove the CMS Tag from your CMS. This function affects every Asset or Item it was attached to, which can profoundly impact searching. Use this option with caution.

Clicking **History** provides a page with information about when and who last touched the Tag. You will also see whether they 'created' or 'modified' the Tag. This information is titled Activity and can be helpful for Admins accessing whether or not they want to Delete a CMS Tag.

If you want to create a new CMS Tag from this window, all you have to do is select the 'Create New' button at the top of the page.

But remember, you can create these tags anywhere the CMS Tag field appears on your platform.

And now I no longer need to be tagged.

Simpleview CMS

Using the Map Publisher Module - Transcript

Can you imagine a world without maps? They tell us where we are and where we would like to be. We've come a long way since the days of guiding our vessels by the stars.

Technology lets us orient ourselves on a map almost instantaneously. These days we can locate almost any place in the world with our phones.

Visitors to your destination depend upon maps to find attractions and activities that will make their stay memorable. This is why Simpleview offers the Map Publisher Module.

You can use **Map Publisher** to build maps representing your destination's restaurants, museums, shopping, cafes, breweries, and anything you believe people visiting your area will want to find.

Map Publisher is also an effective way to share key locations for meeting spaces or convention centers and the amenities surrounding them. Meeting planners and convention attendees will benefit from the curated map content you can provide with Map Publisher.

In this lesson, I will showcase Map Publisher content created by two destinations I love visiting: Oakland and Chattanooga.

Let's start with Visit Oakland.

Anyone who has visited California's Bay Area knows the food scene is phenomenal. You can find the best of just about everything, including vegan offerings.

Visit Oakland leveraged Map Publisher to create a Vegan Trail Map. The Map includes four distinct Map Groups: Vegan Restaurants, Made in Oakland Vegan Products, Vegetarian Restaurants and Farmer's Markets.

Map Groups are a feature of Map Publisher that allows you to gather the spots where you want to direct visitors under headings, such as Visit Oakland has done.

Map Groups contain **Map Points**, which are the specific locations. In Visit Oakland's Vegan Trail, these Map Points are the specific restaurants, shops and markets.

Visitors can click on the Map Points to view detailed information. The data presented in these detailed views are dynamically displayed from your Simpleview **CRM** or manually created within Map Publisher.

Pulling your destination's Simpleview **CRM listings** data to dynamically display via Map Publisher simplifies the process of building maps. It also allows you to highlight your local Member or Partner businesses.

Once you have a CRM listing drawn into Map Publisher, you can update its location, description, and other details. Doing this will only update the listing within your Map Point and not affect your CRM data.

This is an important option because may want to alter a business descriptions to match a map's theme. Or perhaps you want to direct visitors to a different entrance to a business, like a cafe within your local museum of modern art.

Looking at the Vegan Trail Map again, we can see that Map Points within the Map Groups are easily identifiable by unique colors. These colors are just one of the ways you can customize your map.

The Vegan Trail Map is just a part of a full-page experience Visit Oakland created titled the Vegan Trial. The page offers visitors information specific to Vegan or Vegan-curious travels.

This page perfectly illustrates how you can create a map with Map Publisher and embed it into your website. Once you have created your content, the CMS allows you to add your map to your pages with a Map Publisher Widget.

You also can share your map via an embeddable iFrame code or URL. This feature allows partners or stakeholders to add the map to their websites.

Chattanooga used a similar concept to create a three-day Art Lover's Itinerary.

For our next example we'll travel East of the Mississippi River to Chattanooga. This iconic destination used Map Publisher to create a three-day Art Lover's Itinerary.

Like Visit Oakland, Chattanooga built a page and embedded Map Publisher content. The page provides visitors with information about Map Points for each day they've listed as a Map Group.

The Art Lover's Itinerary not only gives visitors three days worth of activities but provides a starting point for them to discover restaurants, shops, cafes and accommodations that fit into a memorable trip designed by the team at Chattanooga.

Map Publisher content can be used in the real world as well. Any map you create can be formatted directly within the Module for **printing**. This means that Chattanooga could print the Art Lover's Itinerary and place it in any location. A **QR code** can be added to the customizable printed maps so people can load it directly into their phones.

Map Publisher is a powerful add-on to your CMS Modules section that offers limitless possibilities for creating experiences for your visitors.

I can't wait to see how you will use it.

Simpleview CMS

Using the Public Relations Module - Transcript

Whoo! Dog-friendly restaurants, that's fun. Hey there! I was just catching up on some blog posts from Visit Tucson.

Speaking of blogs, we will delve into one of the popular Modules Simpleview CMS offers: Public Relations, often referred to as the PR Module. It comes to you with an Articles section, and your destination can purchase a Blog Add-On. The PR Module allows you to create and manage both.

Whether it's a press release, travel partner article, awards announcement, or news from your destination organization, sharing your latest updates can increase your search engine rankings and site traffic.

Blogging can improve customer and industry perceptions, enhance your SEO performance and provide a surplus of social media content and links to your site.

To help you manage the upkeep of blogs and articles, Simpleview developed the Public Relations Module. This Module can add value to your site while humanizing your brand and providing a personal look into your destination.

Let's start our lesson by selecting the Modules icon in the left navigation and then clicking Public Relations.

Here you'll notice we have two options, '**Articles**' and '**Blog**.' Your organization may have updated these titles to "Leisure Blog" and "Press Releases" during the build of your CMS or some other variation that makes sense for your destination.

The PR Module can house multiple PR directories, which lets you manage a leisure-focused blog and your industry-specific articles.

To do this, your CMS partitions the directories. Each directories offers subsections: **Authors, Categories, Posts** and **Tags**.

The '**Authors'** subsection enables you to create authors to add to articles or blog posts. You can enter a name and description for each author and upload a headshot.

And because Article and Blog options are separate within the PR Module, you can have individual Author biographies (bios) for each. This functionality allows you to create author profiles for each audience.

The **Categories** subsection lets you classify Articles and Blog Posts to help website visitors find the content that matches their interests. Visitors can also use Categories to filter by Blog or Articles Posts.

Categories can also serve as guidelines for your content creation team to ensure topics align with your Blog's themes.

In addition to the Author and Categories subsections, your CMS also provides **PR Tags,** which we'll discuss in a moment.

Now that you know how to access the module and understand the subsections, I'll show you how easy it is to create a post. This process looks very similar to building a Nav Item and its content. Many of the same features and fields are available.

I'll work with the 'Blog' option, but remember it's the same process for an Article.

I will click the 'Blog' subsection '**Posts,'** and the Blog Post grid appears. This grid displays all of my organization's existing Blog Posts. From here, we can create a new post or manage existing posts.

The Posts Grid's layout is identical to the Navigation Section Grids. It has the same **'Action' icons** on the left, so you can edit your content or Post properties, delete the post or review its drafts and history.

Within the '**Image**' column, you should see an image thumbnail. This image is the primary image attached to the Post. This image appears on the blog post listing page and is usually the hero for the actual post page.

Moving over to the '**Title**' column, you can click here to open a preview of that Post in a new browser window.

To the right of each Title are the name of the Post's **Author** and the **Publish Start** date, showing when the Post was published or scheduled to post on your website.

In the same way, the '**Publish End'** column displays the date a Post will disappear from your site.

As with all grids in your CMS, some column headers can be **sorted.** The Posts grid sorts alphabetically. The Title, Publish Start or Publish End date sort chronologically.

The last column on the Posts grid is **Status**. The value indicates whether the Post is live on your website or not.

‘**Disabled**’ signifies the Post is not active nor visible on the website.

‘**Scheduled**’ means the Post has been set to publish in the future.

‘**Expired**’ indicates the Publish End date has passed so the post is no longer visible on the website.

Conversely, ‘**No Active Draft**’ means the post is not visible on the website because a Draft has not yet been published.

I’ll also point out the various filters to the right of the grid to help you locate and find specific posts.

To create a new Post in your PR Module, click the ‘**Create New**’ button at the top of the page.

Doing so opens a new screen labeled ‘Create New Blog Post’. And just like when creating a Nav Item, you will need to establish the settings and properties for your Post.

Many of these fields function exactly the same as the Nav Item we built in an earlier lesson, so I will only highlight fields that are unique to Blog Posts.

First, I will select an **Author** from the dropdown and create a Title for the Post. As you know, the CMS automatically populates the Folder field.

Next, I’ll add an image to the Post by clicking the ‘**Images**’ button and selecting an appropriate image from the Asset Library.

I’ll click the ‘**Documents**’ button to add or create a new document within the Asset Library. This will be attached to the Post as a downloadable file.

Although I talked about the **Meta Title** and **Meta Description** in a previous lesson, I want to reiterate their importance. These meta fields are used by search engines to better index your posts and ensure your content tops organic search results pages.

One major reason for adding a blog to your site is for search engine optimization, so it's important to populate these fields.

Providing an **Open Graph Title**, **Description** and **Image** allows you to control what users see when they share your Post using the Facebook share option on your site or on Facebook itself.

You have the option to add Comments to your Blog Posts. All comments are managed through an integration with Disqus - an audience engagement platform. Visitors must create an account with Disqus and are required to accept their privacy policy.

As a best practice, you should associate Categories with your Posts. Limit your PR Categories to a small list to ensure the Posts you create will be consistent with your marketing goals. Also, create distinct Categories to avoid search frustration. For example, "Food & Drink" and "Culinary" are conflicting Categories that will confuse web visitors.

Consider using a few Categories such as Outdoors, Attractions, Food & Drink and Arts & Culture.

Next, you can add a Tag to the post.

You can use Tags to group interests under Catefgories. For example, under an Outdoors category you can create Tags like Hiking, Fishing, Rock Climbing or Mountain Biking.

Like Categories, too many Tags can be overwhelming for visitors, so be selective when creating them.

CMS Tags are a tool for organizing and managing your content throughout the CMS. If your Post is promoting a local event be sure to use the same CMS Tag you assigned to Nav Items and Assets that you can easily locate all these resources in your CMS.

The 'Enabled' field should be toggled to 'ON' to display the Post. You can toggle to 'Off' to remove the Post from public view and place it in draft mode.

Once you complete all of the fields, simply select 'Save Changes'. CMS will then direct you to the Post Builder where you can choose your layout and add the content for your new post.

It's not only easy to spread the word using your Simpleview CMS Public Relations Module, it's beneficial for your website, your visitors bureau and your organization's bottom line.

Take a break and review what you've learned. We'll see you in the next video lesson!

Simpleview CMS

Managing Collection Types - Transcript

I enjoy having a variety of plants -- like these -- adorn my home; the variety makes it an interesting and beautiful place to live.

In this lesson we'll be talking about the variety of Collections you have in your CMS. In a previous lesson, you learned about Collections and how to access them with Widgets inside Page Builder. Collections let you add CMS or Simpleview CRM content to your website pages. We refer to this variety of Collections as Collection Types.

Collection Types can be Announcements, Contacts, Header Slides, Map Points, Social Slides, and to name a few.

The Collection Types in your CMS depend on your website design. Yours may vary from those you see on my screen. Regardless of what you have, you will manage them from the **Modules** icon in your Left Navigation.

Modules contains your repository for all **Collection Types**; it provides access to create, edit and manage content outside of Page Builder.

Let's select '**Modules'** from the Left Nav, and then click **Collection Types** from the list of options. Now, you will see all the Collection Types available to you in **your** CMS.

A standard option is **Slides**, so let's select that Collection Type.

The CMS now presents the associated grid. In this instance, we see "Collection Type: Slides" as the grid title.

You can manage your Collections workflow in two ways. One way is to create new slides from within a Collections Widget **while** working on a page. The alternative is to build slides in Collection Types **before** diving into a Page Builder session. Either workflow is valid, so choose what works for you.

For this lesson, let's say you prefer to gather your images on your desktop and build all the slides you'll need in the Collection Types Module **before** working in Page Builder.

We'll start atop the grid and click the '**Create New**' button to open a form titled "Create New Slide." The title depends on the Collection Type you are working with.

You will fill out all the fields that apply to your Slide and attach an asset: image or video.

You must attach the image or video from the Asset Library. The Collection Types that include Assets actually save you a few steps by letting you add image or video URLs from the form.

Let's say the image or video URL is on your desktop and not in the Asset Library. You have the ability to create the asset in the Library *while* you're working in the Collection Type form. Once your asset is available from the Asset Library, you can add it and continue building your slide.

After filling out the fields and attaching an asset, you can select '**Save Changes**' or '**Save and New**' to create multiple slides.

After creating a new slide, you'll return to the Collection Type: Slides screen.

Now let's review the **grid** and the columns it provides.

Action offers you three icons: Edit, Delete and a dropdown.

Edit lets you update any fields associated with that slide—for example, title, description, or URL. But again, this depends on the Collection Type you are working with.

Delete allows you to do just that, but be careful! You may not want to delete a slide used in a Collection, especially if the Collection is on a page that is visible to visitors.

The **Dropdown** provides two options: **Clone** and **History**.

Clone lets you duplicate your slide, which is convenient if you want to use the same asset but change the fields within the slide.

History supplies you with User Name, Date and Activity columns. These are useful when you must reach out to the CMS teammate who created the slide or modified the slide last.

Back on the primary grid, as you can see, the information entered when we created the slide displays here.

Next, we see the '**Asset**' column. A thumbnail appears here if the Collection Type uses Images or Video URLs.

The ‘**URL**’ column displays the link you have associated with the slide. This URL is the page on your website visitors will be redirected to when they click the slide within a collection.

The last two column you’ll see are **‘Created’** and **‘Updated’**.

The **Created** column tells you when a teammate built the slide, and **Updated** lets you know the last time someone modified it. Both columns provide the option to sort your slides.

Each Collection Type grid and ‘Create New’ form may be slightly different. But all of the grids and forms are variations on a theme, to enable easy navigation.

Spend some time now reviewing the variety of Collection Types in your CMS. I’m going to nurture my plants. We’ll see you next time!

Simpleview CMS

Moving from Draft to Published Pages - Transcript

Building pages for your website can take time. All good things do. The CMS provides a **Drafts** feature allowing you to perfect your content before publishing it. The Drafts feature also enables you to update a page in the background while a version of that page is live for visitors to view and interact with.

In this lesson, I'll walk you through how and when to create Drafts, providing best practices along the way. Once you've perfected your Draft, we'll cover all the steps necessary to Publish a page to your website.

Let's begin with a Navigation Section. From the Sitemap, I will select my site's **Main Navigation**. Next, I'll locate a Nav Item and click its dropdown option in the Action column. Then I'll click '**View Drafts'.**

The platform then takes us to the '**Page Drafts**' grid. Let's define each of the grid columns.

First, we see the 'Action' column, which offers two icons: Edit Content and Delete.

Selecting **Edit Content** takes you directly to the editor in Page Builder, where you can continue editing your Draft. Suppose you want to add new images to your Draft and copy your marketing team has supplied. Clicking the 'Edit Content' icon allows you to do that.

The 'Delete' icon allows you to do just that: delete a draft. However, I recommend carefully considering if you have use for the page in the future. Your Page Draft grid supplies a log of all iterations of your page, which can be advantageous if you want to repurpose an older version. I'll expand on this topic when we discuss the 'Status' column.

The '**Created**' column displays the date and time you or a team member produced the Draft. This column is sortable but defaults to the newest entry.

Clicking **'Preview'** opens the Page Draft in a new browser window. You can share the URL in your browser with team members or stakeholders that may need to approve your page's layout or content.

You will want to share the link supplied by Preview rather than the URL that appears in a Page Builder session. That Page Builder URL is specific to your session and will not carry over your edits to those who you want to review your content.

The '**User**' column displays the CMS user who saved the latest version of the Draft. This information is helpful if you want to follow up with the person who was last to edit a page.

The '**Status**' **column** lets us know the exact state of the Draft. There are three statutes: Active, Draft and Was Active.

Active indicates that this version of the Nav Item is the one that appears on your website. The 'Active' toggle within the Nav Item's properties must be set to 'ON' for this status to display. If it is, this version is live, and visitors will see it.

It's important to note that only one instance of your page in the Page Drafts grid will appear as **Active**. The CMS only allows **one published version** of a page to display on your website.

The '**Draft**' Status tells us that this version of the Nav Item has been saved as a draft and is in that state. A page in 'Draft' Status is probably the one you are working on and will eventually be published.

Here it's important to note that every iteration of a Draft will appear in the grid, so be sure to check the '**Created**' and '**User**' columns before diving into Page Builder and making changes.

You'll want to ensure you're in the right place so you don't update someone else's work!

The final Status is '**Was Active**'. Whenever you publish a new version of an existing Nav Item, the live instance will update to 'Was Active' on the Page Draft grid. The 'Was Active' Status provides a log of all versions of your Nav Items once published to your website. Also, you can revert to an earlier page denoted by 'Was Active' if your published page needs additional work.

The **Notes** column shows the Page Builder Draft 'Notes' you or a team member provided during the last session with that Draft. These Notes can be crucial to understanding changes made to that Draft so that you are informed as you continue your work.

Remember, Draft Notes are your friend and a friend to all your team members. And who doesn't want to be a friend to their team?

Our next column to the right is 'Publish Start', which displays the date and time this Draft will be published. But where is this value derived from? Great question!

You might recall that the Publish Start is set in Page Builder. We will review this feature in a bit.

Lastly, we have the '**Expire**' column. The CMS **Autosave** function sets this value. Allow me to explain.

Suppose you are working on a page and your internet crashes or the power goes out in your office. In these instances, Autosave automatically creates a draft and inserts it in the Page Drafts grid. That entry will have a Note that reads “autosave” and the ‘Expire’ column will supply you with the date and time the CMS will remove this Draft from the platform.

Now that you can access a Nav Item's Drafts and understand the Page Drafts grid, let's review drafts and publishing in **Page Builder**.

For this, I’ll return to my Test Page, which I can access right from my Page Drafts grid.

In Page Builder, you'll see three buttons below the 'Edit Page' header: Publish, Save Draft and Exit.

Publish allows you to commit changes to your Page during a Page Builder session. If your Nav Item is set to 'Active', these changes will immediately post to your website.

If you choose the **Publish** button and your Nav Item is disabled, the CMS will provide a message indicating so and create a Draft.

Save Draft permits you to preserve the changes you have made during your session. Drafts do not affect the version of your page currently published on your website. Drafts allow you and your team to work together on multiple iterations of your page until you are ready to publish.

The Page Drafts grid will log a new Draft version **every time** the Save Draft button is selected.

The **Exit** button lets you close your session. If any changes have been made, Page Builder will prompt you to Publish or Save Draft; otherwise, all updates will be lost.

Below the buttons, you’ll see the '**Draft Settings**'.

Expanding the Draft Settings reveals two features: Publish Start and Draft Notes.

The Publish Start feature allows you to set a date and time to publish your Page to your website. Suppose it's two weeks before your Page is to go live, and you have made all your page updates. Set the Publish Start values, then click the ‘Save Draft’ button.

The date and time you set in Page Builder will appear in the Page Drafts grid within the 'Publish Start' column.

For the ‘Publish Start’ feature to work as intended, you must ensure your Nav Item is 'Active’. Page Builder will alert you if your Nav Item is currently 'Disabled.'

As I mentioned, Draft Notes are your friend and the feature your teammates will thank you for using, so please pay it forward and use this feature.

And there you have it! You are ready to build, update and publish pages! Take some time now to explore the Page Drafts grid in your CMS. Don’t forget to work through the Page Builder practice activities, too!

Simpleview CMS

Using Coupons, Events and Listings Widgets - Transcript

Hello!

In previous lessons, we’ve discussed Widgets and their functionality. Additionally, you learned that your CMS platform dynamically displays information from the Simpleview CRM on your website.

In this lesson, we’ll use three Widgets designed to gather Simpleview CRM data for Coupons, Events, and Listings.

The titles -- **Coupons Widget**, **Events Widget** and **Listings Widget** -- are straightforward, so you know what kind of CRM data you're pulling for display on your website pages.

Let’s take a look at each Widget to demonstrate what they can do and where you might use them on your site. We'll start with the **Coupons Widget**.

To locate these Widgets, you’ll need to be editing a page in the **Content** Frame of Page Builder.

Once you are there, click the ‘Add Widget' button. An alphabetized list of Widgets will appear. Find and select “**Coupons**.”

You should see a couple of options directly below your selection: **Detail** and **Layout** - **List View**.

The first option, Detail, represents a system-based Widget that only works with specific pages set up during your site's design, so for this lesson, I’ll choose **Layout - List View**.

The **Layout - List View** form supplies options for *what* CRM Coupons’ data the Widget will dynamically render and *how* it will be displayed.

The options you see in your CMS may look different than what you see in this lesson, so I will focus on just the options present in every CMS.

The **Categories** field allows you to select from a dropdown of categories your organization created in your CRM. You can add as many categories as you would like; however, it's probably best to choose the 'Coupon' Category that matches the content of your page.

Suppose you have an Attractions page that provides content to parents traveling with their children to your destination. In this case, having a CRM Coupons category titled 'Family Friendly' would be advantageous.

Inside the Widget, I can select 'Family Friendly' from the list of Categories so that only these Coupons display on my page.

Next, I need to decide how I would like my coupons to display on the webpage. The default view is **Grid**; **List** and **Map** views are also available.

Typically, the default **Grid** view works best, especially for Coupons. List and Map views work better with the Listings Widget. However, I recommend trying all three options to determine which works best for your content.

Now I can click '**Save Changes**.' My Widget will appear in Page Builder, and my coupons will display in the Preview Pane.

Let's explore the **Events Widget** next. I will follow the same steps we reviewed a moment ago to access the Events Widget within the Content Frame of Page Builder.

Once again, I will select the **Layout - List View** and see the widget's form options for *what* and *how* the CRM Events' data will be dynamically displayed.

The first choice is the Calendar from which you want to pull Events data. Calendars are created in CRM and determine the Event Categories the Widget form offers you.

The standard Calendar options are **Default** and **Conventions**, so I will select Default to access my destination's leisure events calendar.

Now I can choose the **Event Category** that aligns with the content of my page. If I want to showcase my area's great nightlife, I will select that category. Or, if my page will list the upcoming outdoor enthusiast events happening next month, I will choose the "outdoor enthusiast" category.

These Event Categories get created by your destination in your CRM and then dynamically display on your website. The same is true for Coupons and Listings Categories.

Back on my Events Widget, I'll choose "Concerts & Live Music" since I know this is a popular category in my destination.

The remaining options on my Events Widget form determine how my Events display on the website. Now that I've made my choses, I can click 'Save Changes,' and see how my page looks in the Preview Pane.

To wrap up this lesson, let's look at the **Listings Widget**.

Adding this Widget to your page is identical to the process we followed for Coupons and Events.

However, once we are in the Listings Widget form, you'll notice that the options are slightly different.

The **Categories** you can select have a wide range. Common Categories include Accommodations, Restaurants, Arts & Culture, and Shopping and Attractions. However, your destination has control over the names of Listings Categories and some may be unique to your organization.

With the examples I just provided, you can see that the Listings Widget supplies you with ample opportunities to support content across many different pages on your Website.

For example, your site's Main Navigation may offer Restaurants. Underneath Restaurants, you might have several different Nav Items presenting an array of culinary specialties: Indian, Mexican, Chinese, Japanese, Vietnamese, etcetera.

Suppose your CRM Restaurant Listings Category offers each of these different regional foods as subcategories. In that case, you can build a Listings Widget that includes all or a curated selection of them.

You also have the option of separating your Listings into Regions. This feature is excellent for building pages that showcase specific neighborhoods and their restaurants, shopping areas, museums, nightlife or accommodations.

In addition, Listings allows you to populate your Widget with **Specific Listings**. This means you can search your CRM for distinct Listings you want to show visitors.

This option is excellent for building highly curated pages. You may only want specific BBQ pits in a particular neighborhood. Using the Specific Listings feature, you can create that Listing for a unique audience.

And, now you know how to use your Coupons, Events and Listings Widgets to create website pages highlighting your destination's best offerings. And your visitors deserve nothing short of the best.

Simpleview CMS

Using the Text Editor Widget - Transcript

A website page without written copy is like a book without words. Sure, you could plaster your pages with images, but your visitors need factual information at some point. How you present your copy is crucial to the success of the messaging your destination worked so hard to craft.

The CMS offers you a myriad of Widgets within Page Builder. Each has a specific purpose but a common goal: to communicate why your destination is where visitors want to be.

The Widget you'll find yourself consistently relying on to publish copy to your website pages is the **Text Box** Widget.

To access this Widget, we need to be in Page Builder.

We will open the page we're working on and locate the Content Frame within our Page. Next, we'll click the 'Add' button and select 'Add Widget'.

These actions will open the alphabetized list of Widget Categories available for the **Content Frame**. You'll find the **Text Box Widget** within the 'Text' Category, toward the bottom of the Category list.

Once you click the 'Select' button for the Text Box option, the Widget appears within your Content Frame.

The Text Box presents itself as a no-frills What-You-See-Is-What-You-Get (**WYSIWYG**) editor. And honestly, that's precisely what it is. However, this Widget offers functionality specific to the CMS, too.

We'll get to those functions in a moment. First, let's review the basic features of the Text Box.

The top row offers six sections. Each section contains various formatting options.

For example, the first section supplies bold, italic, underline and strikethrough.

The second section allows you to insert images into your Text Box. Clicking on the image icon opens an overlay of Image Properties.

You have the option to import an image via URL or from 'Browse Server.' I strongly recommend the second option as it gives you control over the image you add to your page. If you point to an image hosted on another site well, it could disappear at any time, which means your visitors will see a broken image.

Browsing the server gives you direct access to the Images section of your Asset Libray. You can select an image that lives there or create a new one.

Once you have an image, you can adjust its dimensions and add a border and spacing. The aspect ratio is automatically locked so the image will not distort.

You also have the option to align your image in line with the text in the Widget.

The third section gives you the ability to insert bulleted or numbered lists. Lists like these can help organize or callout content; however, I suggest previewing your page display on multiple devices to ensure these lists display how you want them to. HTML can be tricky when published through editors, so it's always best to triple-check your work before going live with your page.

The fourth section provides standard paragraph formatting: align left, right and center.

Section number five supplies you with the ability to insert a horizontal line, which can provide a necessary visual break between paragraphs on your page. In addition, a grid option is provided.

Exercise caution when using the grid. Be sure to test on mobile devices to ensure the grid displays correctly.

The last section in the top row offers two excellent features: **Link** and **Anchor**. I know that sounds like the name of a hipster brewery, but I assure you it's not. At least not yet!

The Link option allows you to add a hyperlink to any text in your Text Box.

Highlight your text, click the Link icon, and select 'Browse'.

A 'Select Link' tool lets you connect your selected text to any Nav Item, Listing, Event or Blog Post in your CMS. In addition, you can link to Documents in your Asset Library. Using the 'Custom Link' option, you can also direct your visitors to external sites.

An 'Auto Detect' feature will automatically determine if the linked page lives on your website or an external site. If the page is on your website, the link will take visitors to that content. If the page is on an external site, 'Auto Detect' will open the link in a new browser window. However, you have the option to override 'Auto Detect'.

Now, let's move on to the second row in the editor. Here we see four sections.

The first is **Paragraph Formatting**. This option lets you apply document header formatting like H1, H2 and so on to your text.

This formatting conforms to your website's style guide. You will not see the formatting in the Text Box Widget, but once you save and return to the Page Builder, your formatting will display in the Preview Area.

Next, we see the 'Remove Format' icon.

Suppose you copy and paste text from a Word document into the Text Box. Highlight that text and then select the 'Remove Format' option. This feature will remove any problematic formatting that may have carried over from Word or any other program you used.

The following section offers you Transform options. These allow you to highlight and transform blocks of text. You can capitalize, switch or convert to upper or lower case. This feature can save you from manually updating titles of events, listings or anything else that needs transforming!

The last section is Source. Clicking on Source opens an HTML editor. This lets you make basic HTML code updates like adding line breaks or custom formatting.

Additionally, you can add iFrame or embed code directly into your Source view. That being said, your CMS does offer utility Widgets designed explicitly for embedding videos or UGC blocks, so we recommend using those instead of the Text Box.

Simpleview CMS

Using Collections Widgets - Transcript

A website without images is unimaginable. A website with images that lack style in their presentation is unimagina**tive**. Fortunately, your CMS offers a Widget that is a stylist for your website imagery.

In fact, the CMS offers you a myriad of Widgets within Page Builder. Each has a specific purpose but a common goal: to communicate why your destination is where visitors want to be.

One of the Widgets you will rely on to aggregate images and text for display on your site is Collections.

To access this Widget, we need to be in Page Builder.

We will open the page we're working on and locate the Content Frame within our Page. Next, we'll click the 'Add' button and select 'Add Widget.'

These actions will open the alphabetized list of Widget categories available for the Content Frame. Within that list, you will find Collections.

Opening Collections lists **Collection Types**.

For a complete list of the Collection Types available in your CMS, click the 'Modules' section on the left navigation and review the 'Collection Types'. In this example, we'll work with a Collection Type that functions in the Content Frame on our Test Page: **Slides**.

Once you click 'Slides', a new screen appears titled **Widget: Slides**. You'll find the following elements within this Widget: **Template**, **Template Settings** and **Populate Template**.

Let's start with the first section: **Template**.

Click within the Template field's "Select a Template...." box. You'll find a dropdown listing the available templates.

During the design of your website, your organization worked with Simpleview to determine the look and feel of the site. Your team made decisions that included how content would display, and these Templates were created.

The Template informs the Widget how it will gather and display some of the pages' text and images.

You may see Templates beginning with "Call Out Titles," "Cards," and "Image Box" within the dropdown menu. Each option offers a few variants directly related to the number of Slides the Template will use.

I'll select 'Call Out Titles, 4 Across.' This Template offers Template Settings, which now appear in the Widget. Template Settings will differ based on the Template you choose. And, some Templates do not show settings.

The Settings for this particular Template include **Title, View All Caption** and **View All Link**.

Because the Settings for Templates vary, I won't go through each possible field that will display. Know that your CMS platform contains help text below fields to assist you.

Okay, I'll simply enter “Test Title” and move on to the next section, **Populate Template**.

Populate Template provides two Source Type choices: **Feed** or **Slides**.

Let's review the **Feed** Source Type first.

This Source Type lets you pull content directly from your Simpleview CMS **or CRM**. The content will display according to the **Template** and **Settings** you have selected for your Widget.

Suppose you are building a page highlighting your area's upcoming sporting or music events. The **Feed** Source Type lets you search your Simpleview CRM and select specific **Events** or **Event Categories** to populate your Widget. You can also use the Feed Source Type to display **Coupon** offers and business **Listings**.

You can also select CMS-based feeds like **Blogs**. Suppose you want to pull specific Blog posts onto a page or even all Blog posts from a blog **category**; you can do that! For example, if your website displays a page dedicated to breweries, you can set your Collections Widget to pull all related Blog posts onto that page automatically. Set it and forget it!

Once a Feed Source Type is selected, the Widget will provide various options for importing your Feed content.

The CMS Knowledgebase provides a detailed overview of all the Feed Settings that appear in the Collections Template Widget.

The other option you have for Source Type is **Slides**. This option provides direct access to your 'Slides' Collection Type. We will go over managing your Collection Types Module later in this course.

The **Slides** Collection Type enables you to select or create the slides you want to appear on your page. Once you have chosen your Slides, they appear in the Widget. You can drag your Slides to arrange the order they will display on your page.

It is important to note that if you want to edit a Slide, like updating the image or the link URL, you **must create a new Slide**. Editing a Slide in a Widget updates that Slide everywhere it's used.

Once you have selected your Slides or your Feed, you can save your changes. The Collections Widget you choose will display in the **Preview Area** of Page Builder.

We hope you feel educated and empowered to use the **Collections** Widget. We can **imagine** the great pages you will create using the Collections Widget! See you in the next video!

Simpleview CMS

Building with Frames, Panels and Widgets - Transcript

Just as a carpenter has many tools in their workshop to build a table, Page Builder offers many features and functions to build or edit your website's pages successfully.

The Edit area of Page Builder provides the bulk of those features and functions. Specifically within Page, which is where most of your work within Page Builder will happen.

The Page section provides the structure for your content and access to the tools you will need to build your content.

When we expand the Page accordion, we see four different Frames: Header, Hero, Content and Footer. Combined, these Frames provide the foundation for your website page.

Let's start with the first Frame we encounter: **Heade**r. When we expand this frame, it contains an element outlined in blue. This is a Panel. Simply put, a **Panel** is a container that provides structure to content placed inside it.

If you go to the store and buy a storage box, it has a bottom, four sides, and a top. That box is a container; you choose what goes in it.

That's a great way to picture a Panel on a Page, too. It is a container providing structure for content of your choosing.

With this in mind, let's expand the **Header Panel** and do some exploration.

Inside the Header Panel, we see its **contents**. The contents include sections labeled 'Logo', 'Main Navigation', 'Secondary Navigation', and 'Search Box', among others.

When we visit the home page of our website, our Header Panel's **contents** are visible within the navigation menu. Notice the website's logo and Main Navigation items such as 'Things to Do' and 'Places to Stay'. You see the Search box and Secondary Navigation items display as well.

Okay, now that we've made the connection between our live website's display and the Header Panel's content on the backend, let's continue to our next frame in the Page: **Hero**.

Within the Hero Frame, we encounter a new element: a **Widget**. All Widgets are outlined in yellow, to distinguish them from Panels.

Widgets perform multiple functions that allow you to pull assets and content from your CMS or Simpleview CRM for display on your Page.

This Widget is called a Collection. Simpleview CMS refers to Widgets that are image-based as Collections. In the next lessons, we will review Collections in depth, highlighting different types of Widgets and how they work.

Clicking the gear icon on the Widget offers several options.

'**Edi**t' provides access to the inner workings of the Widget. You can program or modify the assets and settings the Widget offers with this option.

'**Clone**' allows you to duplicate a Widget, saving you much time.

'**Remove**' does just that: it eliminates the Widget from the Frame you are working in.

'**Convert to Saved Widget**' is a powerful function that makes a copy of your Widget and saves it so you can access it later when working on the same page or other pages.

'**Rename**' provides you with the ability to update the name of your Widget. Suppose you are working on a page and have added multiple Panels and Widgets. This can get confusing! Renaming lets you quickly change the Widget title to match its content, so it's much easier to locate.

Now let's move to the Frame titled **Content**.

Inside Content, there is an 'Add' button. You probably noticed this button in the Header and Hero Frames we well. You can insert a Panel or Widget into any Frame by clicking this 'Add' button.

Let's click 'Add' and then choose 'Add Panel'. You'll notice that your platform displays two tabs: 'New' and 'Saved'.

The Panel options that display under each tab depend on the Frame you are working in and the design of your website. For example, the Panels you can add in Header will not be available in Content, Hero or Footer.

‘New’ Panels are like blank canvases that offer generic container types like one, two or three columns.

‘Saved’ Panels were previously created by someone in your organization or created during the build of your CMS and website.

An example of a ‘Saved’ Panel is your default Header Panel. You would not want to recreate your Header for each new website page you build! That would be highly inefficient. Saved Panels allow you to build a Header once and then add it to every new page.

If you are building a page and notice you are repeatedly creating *identical* Panels filled with the same Widgets, make a ‘Saved’ Panel instead! You will have “*Saved”* yourself a lot of time, no pun intended <wink>.

Moving on, let's choose 'Add Widget'. And, just like we saw with Panels, we have two tabs: ‘New’ and ‘Saved’. Each tab contains the Widget choices associated with the Frame.

Clicking ‘New’ displays all your platform's available Widget categories. Click the arrow to the left of the category, and then click the ‘Select’ button next to your choice of Widget. Depending on your chosen Widget’s functionality, you can either add it directly to your Panel or begin customizing its content immediately.

Your CMS contains an abundance of Widgets. In upcoming lessons, we will take a look at the following Widgets: Text, Utilities and Collections. We will also explain the CRM-related Widgets, including Form Builder, Coupons, Events and Listings.

Feel free to explore the various types of Widgets as you practice building pages. You can also include the word “Widget” in your conversations today to earn double secret CMS course bonus points.

Simpleview CMS

Creating a Nav Item

Selecting Your Page Panel - Transcript

Once the system saves your new Nav Item, you will see the **Page Panels** grid. From here, you can choose how your Page will display on your website.

You are presented with three tabs at the top of the grid: **Layouts**, **Panels** and **Existing Nav Items**.

Layouts were established when your website was designed. Layouts provide the basic framework for a Page. Generally, they include your site's default Header, a placeholder dominant image called a 'Hero', Content and your site's Footer.

Again, your available **Layouts** depend on your website's design. The best way to learn about the features of your Layouts is to add them to test pages you build.

Selecting a Layout saves time and assists in keeping your destination's brand standards. The time savings lets you focus on developing your Page content to fill in a Layout's framework.

The next tab is **Panels**. Think of this option a blank canvas: no Layout, Header, Hero, Content or Footer. You are like Picasso starting on a new canvas! Instead of paints, a palette and brushes, you have the tools in your CMS.

Using Panels sounds freeing, but it takes a great deal of time to create a Page from scratch. You will likely use Layouts or the last option, **Existing Nav Item**.

Existing Nav Item is a cloning feature that allows you to browse your Sitemap and select any Page available. The platform will make an exact duplicate of that Page and open it in Page Builder, where you can switch out all the contents to meet your current needs.

At this point, you would most likely click the 'Save Draft' button. In an upcoming video lesson, we'll discuss the 'Publish' versus 'Save Draft' options.

Alright, now that you have set up your Nav Item and decided on a Page Panel option, you can access **Page Builder**, where you will build your page.

Take time to practice and complete the rest of the lesson activity to ingrain all that you have learned about building Nav Items. We'll see you later!

Simpleview CMS

Page Builder: Orientation & Overview - Transcript

And now for the moment you have been waiting for. It's time to start building pages!

Once you have completed the setup of your Nav Item, you'll be deposited in Page Builder. This is where the magic happens! Page Builder provides you with all the functionality you need to build spectacular website pages. And when I say "all the functionality," I mean it!

Before we explore the array of features and tools Page Builder provides you, let's get you oriented to its interface with a brief overview.

Page Builder is split into two distinct areas - like a split screen! On the left, we see the **Edit** area and on the right, the **Preview** area, also known as the Preview Pane.

We'll start with the **Edit** area, which contains two sections: **Edit Page** and **Page**.

The **Edit Page** section is easy to find; it's labeled with a large header. Just above that header, Page Builder provides a breadcrumb trail so that you know which Navigation Section you are in and which Nav Item you are working with.

Below the 'Edit Page' header are three buttons: **Publish**, **Save Draft** and **Exit.**

Publish allows you to commit changes to your Page during a Page Builder session. If your Nav Item is set to 'Active,' these changes will immediately post to your website.

Save Draft permits you to preserve the changes you have made during your session. Drafts do not affect the version of your page currently published on your website. Drafts allow you and your team to work together on multiple iterations of your page until you are ready to publish.

In a separate lesson, we will discuss working with and managing your Page drafts.

The **Exit** button lets you close your session. If any changes have been made, Page Builder will prompt you to Publish or Save Draft; otherwise, all updates will be lost.

Below the buttons are two collapsible components: Draft Settings and Revision History.

Expanding the **Draft Settings** reveals two features: **Publish Start** and **Draft Notes**.

The **Publish Start** feature allows you to set a date and time to publish your Page to your website. For example, let's say it's two weeks before your Page is to go live, and you have made all your page updates. This is great! Congratulations on being organized and ready with your content!

Go ahead and set the Publish Start date and time, and then click the Save Draft button. Voila! Your page is all ready and will be published in two weeks.

For the Publish Start field to work as intended, you must ensure that your Nav Item is set to **'Active'**. But there's no need to stress because Page Builder will alert you if your Nav Item is currently 'Disabled'.

Draft Notes are your friend and are the feature your teammates will thank you for using. Use this notes field to remind yourself and notify teammates about what and why you updated the page. As a best practice, add any other information that could prove helpful to teammates also accessing the page or draft. Please, pay it forward and use Draft Notes.

Below Draft Settings, you will see **Revision History**.

This feature keeps track of changes made to your page. Suppose you clone an element or edit page assets. Revision History will log those changes and list them with detailed information so that you know exactly what you've done during your session. CMS likes to pay it forward, too!

Revision History entries only apply to your current session. They do not carry over into your next session with a page.

The second section in the Edit area is **Page**. This section is where most of your work within Page Builder will happen.

The **Page** section provides the structure for your content and access to the tools you will need to build your content.

When we expand the Page accordion, we see four different Frames: **Header**, **Hero** (or Header Slideshow), **Content** and **Footer**. Combined, these Frames provide the foundation for your website page.

The Header contains all elements comprising your website's primary and secondary navigation. It also includes your site logo, weather utility, search box, social icons and potentially more, depending on your site's design. Think of the Header and Footer Frames as vertical bookends for your page.

The **Hero** Frame allows you to insert images or video assets below your website's header. Hero elements are typically the visual gateway into your website and set the tone for your content and the visitor's experience.

The **Content** Frame is where the power of Page Builder is entirely on display. **Content** refers to the body of your website's page. Use this frame to insert text and images. You can use many more advanced Page Builder tools to create stunning pages for your visitors.

The final frame provides access to your website's static bookend, the **Footer**. Typically the Footer Frame remains as is, but if you do need to make changes, this is where you would go.

As I mentioned, a lot will happen inside these Frames. In a later video lesson, we will dig deeper into all that Page Builder offers in Frames.

Now we can move to the right side of our screen, the **Preview Pan**e.

Immediately you will notice that the Preview Pane is displaying a version of your page. The **Preview Pane** displays the contents of your Edit area's Page section as visitors will see them on your website. This is your visual check that what you're building in the Edit area displays as you expect.

When you hover within the Edit area's **Page** section on the left side of Page Builder, you will see elements within the **Preview Pane** highlighted in red on the right side. This action will simultaneously highlight the corresponding Frame element in the Edit area. This feature is extremely helpful when you are working with a page filled with Panels, Widgets and Collections. Oh wait, we haven't discussed Panels, Widgets and Collections yet. Don't worry; we will explain **those tools** in our next video lesson.

For now, let me direct your attention to the display option icons resting atop the preview of your page. Let's review these icons starting at the far **right** and moving **left**.

The first icon option enables you to '**Preview in Fullscreen**'. This is perfect for those people working on two monitors. Clicking this icon pulls the Preview area from Page Builder, opens a new browser tab and enables you to displays your page content preview on your second monitor.

When you click the 'Preview in Fullscreen' icon, you will also notice the original tab's **Edit** area expands to the entire width of your screen. This is one of my favorite features because it provides maximum screen “real estate” to both areas of Page Builder.

To exit the 'Preview in Fullscreen' feature, close the browser tab displaying the Preview area. The Preview area will then reappear in Page Builder.

Okay, moving to the left, we can click the '**Preview at desktop**' icon, which is the default setting for the Preview area of Page Builder. While this view is acceptable for working in Page Builder, I recommend using the 'Preview in Fullscreen' option before publishing your page. The Fullscreen option allows you to review your work at full size within your browser, which is how your visitors will see your page.

The remaining ***viewing*** options, moving to the left, are '**Preview at Tablet size**' and '**Preview at Smartphone / Mobile size**,' respectively.

These preview options will approximate what your content will look like on each of these devices. Of course, these preview options cannot supply an accurate QA (Quality Assurance) test, so we recommend distributing a **page draft preview URL** before publishing. Doing so will ensure your team can review your content on many devices to make sure everything is perfect.

We will review the draft preview function in an upcoming lesson.

The left-most icon is the '**Refresh the Preview Pane**’. Sometimes when you make multiple changes, Page Builder needs a reminder to refresh the view in the Preview pane. Click this ‘Refresh…’ icon, and your preview area will sync with the changes made in the Edit area.

And now after we ‘Refresh the Preview Pane, we can refresh, too, because we’re done with this lesson!

Simpleview CMS
Creating a Nav Item

Nav Item Section: **Meta Info** - Transcript

You can't see me, but I am very important.

It's time we talked about **Meta Info,** the final Nav item section. Here you can provide information that helps search engines and social platforms promote your content to potential visitors.

Whatever you enter in the '**Meta Title**' field is what search engines like Google will display as the label for your Page on their search results page.

For example, for my 'Things to Do' Nav Item, I entered 'Things to do in Simple City | Hiking, Attractions & Tours' as my **Meta Title**. I created this Meta Title based on guidance from the CMS Knowledgebase and a conversation with a Simpleview SEO analyst.

Optimizing your Meta Title for search engines is crucial to ensuring your Page ranks at the top of search results pages. You'll be exploring metadata resources in the CMS Knowledgebase as part of the lesson activity of creating your practice Nav Item.

Meta Description is the companion field to the Meta Title. The Meta Description appears just below your Title on search results pages.

There are many factors to consider when creating your Meta Description, including character length and keywords. Once again, we'll direct you to CMS Knowledgebase resources in the activity that follows.

Setting up ill-formed Meta Titles and Descriptions can adversely affect your website ranking and performance. So please make sure you are up to date with current best practices.

The fields we encounter next are **Open Graph Title**, **Description** and **Image**. The **Open Graph Title** and **Open Graph Description** fields functions similarly to the Meta Title and Meta Description fields we just covered. The difference is that Open Graph fields display on social platforms, primarily Facebook.

Providing an Open Graph Title, Description and Image allows you to control what users see when they share your Page using the Facebook share option on your site or on Facebook itself.

Because it's so important and I love saying it, let me repeat my recommendation to review Simpleview's CMS Knowledgebase resources or speak with your organization's SEO expert.

The *last field* in the Meta Info section is the **Canonical URL**. You will rarely use this feature, if ever, but that doesn't mean I won't define it!

Canonical URL allows you to manage duplicate content on your website, which can be problematic for SEO efforts.

If you copy content from existing pages on your website or from third-party sites, you will want to provide a **page of authority**. This Canonical URL informs Google and other search engines that **you are aware you are replicating content**. Consequently, these search engines will not demote your reputation and subsequently de-rank your page in search results. Think of it as citing sources when writing an academic paper. You wouldn't want your teacher to accuse you of plagiarism and you certainly don't want your destination's website to be downranked by search engines.

All right, now that I've completed the setup for my new Nav Item, I can confidently click the '**Save Changes**' button.

And with that it's time for me to go.
But don't forget about me….

Simpleview CMS

Creating a Nav Item

Nav Item Section: **Content** - Transcript

If content is king or queen, we should probably talk about it, reverently of course.

The next section -- **Content** -- provides options for describing and organizing your Nav Item.

The ‘**Image**‘ field and its accompanying ‘Images’ button field lets you browse the Images section of your Asset Library for a photo to associate with your Nav Item. The design of your website determines how this Image displays.

Most commonly, this asset will display on your website's search results page. However, the image is just as likely to display in a related content widget or in a Collection. We have yet to discuss these in the course, but soon you will learn more about Widgets and Collections.

The ‘**Description**’ field is a companion and complement to your Image. Your website's design determines how your CMS platform displays the Description; however, this text is typically used in Collections. Again, more on Collections later.

Next, you will find two organizational tools: the ‘**CMS Tags**’ and ‘**Nav Tags**’ fields.

Applying a **CMS Tag** or multiple CMS Tags lets you easily associate your Nav Item with a specific event or marketing campaign, to locate it when searching your Sitemap. For example, if this Nav Item is a Page displaying seasonal content, best practice suggests you apply a tag such as Holiday, Spring, or Summer. If the Page is for a specific event, then you would use a CMS Tag particular to that event, such as County Fair or Holiday Market.

Nav Tags provide an opportunity to group Nav Items within your Sitemap. If you are creating a new Nav Item under 'Things to Do' in your Main Navigation Section, then tagging best practice recommends applying a 'Things to Do' Nav Tag to this Item and any Child Items you build. Using organizational tags makes finding Items a breeze, for you and others on your team!

If I could crown you the content monarch, I would. See you later.

Simpleview CMS

Creating a Nav Item

Nav Item Section: **Publishing Options** - Transcript

For this lesson, we are continuing to set up our new Nav Item titled “Test Page.” We’ve selected ‘**Page**’ as the item Type for our Nav Item, which automatically populated the Folder field. So we are set to move on to the next three **sections**: **Publishing Options**, **Content** and **Meta Info**.

Publishing Options include settings that inform your CMS platform when a Nav Item should be published and for whom it should be published.

Let's address the ‘Publish Start’ and ‘Publish End’ fields first. CMS lets you set a date and time for your Nav Item to become active. For example, say your destination has a new marketing campaign coming up in a month. You can create a new Nav Item **now** and set the ‘Publish Start’ fields to the specific date and time the new marketing campaign launches. CMS will update your Nav Item's status to 'Published' on the specified future date.

Similarly, the ‘**Publish End**’ field allows you to set a date and time for CMS to update the Nav Item to ‘Disabled’ so that it no longer shows on your website. The ‘Publish end’ field is perfect for marketing campaigns and seasonal content.

Show in Navigation is our next option. This field automatically defaults to 'ON' because the platform assumes you want visitors to find your Nav Item on your website. However, you may want to toggle this field to ‘OFF’ to hide the Nav Item from visitors. The Nav Item will remain searchable on your site and via search engines even if ‘Show on Navigation’ is toggled to ‘OFF’.

Setting **Show in Navigation** to 'OFF' can apply to seasonal content that **was** previously live on your site and has been indexed by search engines. Rather than disabling the page and setting up a temporary redirect, you can simply **not display** the Nav Item in your website’s navigation.

The next field we see is ‘**Show in Search**’. For Main, Secondary and Footer Nav Items, the **Show in Search** field defaults to 'Yes'. A dropdown provides two additional options: 'No, this item only' and 'No, this item and all children'.

The option you choose determines whether or not your Nav Item will appear in your **website search** and, subsequently, in **search engine** results pages.

You will want most of your Page-type Nav Items set to 'Yes' so those pages are searchable on your website and via search engines. However, you may have Pages that you **want to hide** from your website's internal search and from search engines, like Google.

This could be the case for a page about a temporary weather disturbance, travel restrictions or health advisories. Hiding the page from search indexing is a great solution for information directed at meeting planners, conference attendees or marketing campaign partners.

For instance, suppose you have created a Page that's a **contest form submission confirmation** page. In this case, you only want the content to appear to those site visitors who filled out the form, not everyone who visits your website. By setting the 'Show in Search' to '**No, this item only**', your CMS platform will **not** index the form submission confirmation page nor will search engines.

Selecting the '**No, this item and all children**' option will hide the Nav Item and all of its child Nav Items from searches. This option is typically used for **Microsites** since it prevents all Nav Items that are part of the Microsite from appearing to audiences that are not meant to see them.

We have just two more fields in the Publishing Options section. '**Open in New Window**' field is a toggle that defaults to 'OFF'. If you set the toggle 'ON', you are instructing your website to open the Page in a **new** browser tab. This option is helpful in instances where you are supplying specific content that a visitor might read and then close.

Let's say you have temporary content, like those contest rules. A visitor might close the tab after viewing that content and then move on to another website. Setting the 'Open in New Window' field to 'ON' ensures your website persists in their browser, which could lead to a booking.

The last field in the Publishing Options section is '**Restrict Access**', which defaults to 'No' since 'No' applies to most of your pages. You can also choose to restrict a page access by 'Extranet Users' or by 'Registered Visitors'.

The '**Restricting access to Extranet Users'** option allows you to limit access to a Page so only registered members/partners can view it. The Extranet is the password-protected portal where your local businesses can update their account information and listing information, submit calendar events, add coupon offers, etc. The Extranet is a connection point to your destination organization's Simpleview CRM.

If you select the '**Registered Visitors**' option, you can limit page access to a specific group of users, referred to in your CMS as an ‘Access Group’. You’ll notice the ‘Access Groups’ field appears once you select ‘Registered Visitors’. You can create and manage these groups from ‘**Access Groups’** within the CMS ‘Visitors’ Module.

That’s it for your Publishing Options!

Simpleview CMS

Creating a Nav Item

Nav Item Section: **Initial Settings** - Transcript

We hear Cellphone Navigation saying, “Head north” “at the roundabout turn left.”

And here is my spot… Hello! Without navigation I’d be lost. Today we are going to **navigate** how to create **Nav Items** in your CMS.

Navigation Items, referred to as **Nav Items**, fill in the framework of your Sitemap. These Items are the **pages** that hold the content your visitors experience, or they can be **links** to existing pages within your website.

Before adding content to a Nav Item, we must define its settings, properties and layout. Your choices will determine how the Nav Item displays on your website and how search engines index it.

Let’s get started with two questions you need to ask yourself before creating a Nav Item.

First, are you setting up your Nav Item in the correct Navigation Section? Everyone makes mistakes, even Simpleview experts, so take a moment to ensure you are in the right Navigation Section of your Sitemap. The section you intend for your Nav Item to live on your website. Each section will boldly declare itself at the top of its grid page.

Second, are you at the correct level of your Navigation Section? Double-check to ensure you create child Nav Items under the parent item appropriate for your Sitemap and visitors.

Once you have answered these questions, you are ready. So, let's get down to business and set up a Nav Item!

From your Sitemap, select the Navigation Section where you intend to build your Nav Item. For this lesson, I will select the Main Navigation section.

Once you have accessed the Main Navigation Section grid, click the 'Create New' button. A new screen appears titled 'Create New Nav Item'.

This screen presents various options for establishing the settings and properties that inform the CMS what type of Nav Item you are creating and where it can be found on your website. You will also set up additional information from this screen, but let's begin with the first field, ‘Active’.

The ‘Active’ toggle defaults to ‘ON’, but as a best practice, you should switch it to ‘OFF’ while you build a new Nav Item.

When you select 'Off’, your Nav Item will display as 'Disabled' in the Status column of the Navigation Section grid and will not show on your website.’ Additionally, by setting Active to 'Off' any of the Nav Item’s “child” items will be disabled.

When you select 'ON’, your Nav Item displays as 'Published' in the Status column of the Navigation Section grid. Typically, this ‘Published’ Status indicates that your Nav Item is live and displays in your website Header. However, you do have the option to **hide** your Nav Item from your website visitors. We will go over that shortly.

Okay, I have the ‘Active’ field toggled ‘OFF’ to ensure my content is not prematurely published and accessible to visitors.

Next, we encounter the ‘**Title**’ field. The name you enter here will appear in your website Header. For example, if you enter 'Things To Do, ' that displays on your website.

After you enter the Title, the **Folder** field will automatically populate with the same name. The Folder is the path to your Nav Item. This value is expressed in your visitor's browser as a URL, so if our domain is VisitSimpleCity.com, your path becomes VisitSimpleCity.com/Things-To-Do.

We’ll create a new Nav Item and title it **Test Page**.

The CMS automatically adds hyphens between each word in your Folder. This ensures search engines parse each word, producing optimized search results.

After addressing the first three fields - Active, Title and Folder -- you'll use the ‘Item Type’ field to determine whether your Nav Item will be a **Page** or a **Link**.

A **Page** is just that: a page of content that will appear on your website. This Item Type allows you to choose a layout and gives you access to CMS’s Page Builder tool set. We’ll go over Page Builder functionality in a later lesson.

The **Link** Item Type allows you to connect your **new** Nav Item to an **established** Nav Item. For example, your organization may have created a Landing Page for a local festival last year. This year you decided to include that Landing Page in your website Header as a Nav Item under 'Events'.

When you select **Link** as the Item Type, the platform supplies a 'Link field with a 'Browse' button'. Clicking the 'Browse' button gives you access to all existing link options to which you can connect your new Nav Item.

You may use the **Link** option to create a new Title and Folder for a Page that can now appear in your **Main**, **Secondary** or **Footer** Navigation.

Going back to our Fall Festival scenario, I'll demonstrate attaching a **Link** to a new Nav Item. From the Sitemap's 'Main Navigation' Section, I locate the 'Events' Nav Section. Clicking the dropdown action item, I select the 'View Children' option to reveal the grid. From there, I click the 'Create New' button at the top. Now I address the first four fields on the New Nav Item: I'll toggle 'Active' to OFF. I'll add "Test Page" as the Title, and notice how this will autopopulate the 'Folder' field.

Next, I'll select the 'Link' Item Type and then the 'Browse' button that appears. I'll locate the existing Nav Item -- Fall Festival -- from the 'Landing Pages' Section.

And now it's time for me to Navigate out of here. We'll see you in the next video where we'll continue to work on the New Nav Item's other settings and properties!
(talent holds up their phone, turns around and walks out to their right).

Simpleview CMS

Using the Navigation Section Grid - Transcript

In a previous lesson, we defined a Sitemap, and you learned how Navigation Sections fit within the Sitemap structure. Now, it's time to focus on the Pages and Links that branch off your Sitemap. We call these subsections **Nav Items**.

Nav Items are a foundational element of your website. Nav items include the content -- Pages and Links -- as well as the settings that determine how your content will display, the path taken to that content and the metadata that helps search engines index your page content.

Once you have established a Nav Item's properties, you can move forward to build a page filled with all the content your visitors will experience on the front end of your website.

Open your Sitemap, select your domain and click to open a Navigation Section. Setting up properties for Nav Items is identical across all Navigation Sections, so you can choose whichever section you want. For this demonstration, I'm going to select 'Main Navigation'.

As you can see, our actions open a screen listing every Nav Item under the Main Navigation section. We refer to this view as the **Navigation Section Grid**. I'm going to explain the columns and action icons you see on the grid to help you understand the choices you have when building or modifying your Nav Items. We'll actually build a Nav Item together in the next video.

The Navigation Section Grid provides options to modify a Nav Item's properties and update a page's content. The grid displays top-level information about your Nav Items and offers additional features.

Let's start with the **Title column** in the grid. We are skipping the Action column for now, but don't worry; we will return to it.

The **Title** is the name you assign to the Nav Item. Visitors see the Title on the front end of your website. Notice that the 'Things To Do' Nav Item Title displayed in your grid is listed identically in your website's header.

The **Folder column** contains the URL path for the Nav Item on your website. Clicking the Folder name opens a new browser tab allowing you to preview your Nav Item's content.

Next, the **Type column** communicates whether the item is a 'Page' or 'Link'.

The **Status column** informs you as to whether the Nav Item is live on your website or not. Suppose the column displays as 'Published,' the Nav Item is live and accessible to your visitors. If the column states the item is 'Disabled,' your Item is not live. You can choose to disable a page until its content is ready to present to visitors. When you activate your page, it will be published for the world to see.

Our next column, '**Show in Nav**', indicates whether the Nav Item is displayed in your site's navigation.

For example, when ‘Show in Nav’ is set to 'No', the Nav Item is not listed under your site's Header. However, the Nav Item’s content will still be live on your site and available for search engines; it just will not be visible in your Header's navigation options.

The **Updated column** provides a timestamp with the most recent date a Nav Item's content or properties were edited or published. This value can be used in searches to identify outdated content or recently updated content.

The Navigation Section Grid allows you to change the sort order of your Nav Items. To do so, select a Nav Item within the grid and drag it to your desired position. The platform will ask you to confirm the change. This function makes resorting items in your Navigation Section simple, **and** your changes apply to your website's Navigation.

Okay, we’re moving on to the **Action column,** as promised!

The **Edit Content** icon is the first item in the Action column. Click the icon to open the Page Builder tool, where you can edit the structure or content of an existing page.

Next, we have the **Edit** icon. Edit allows you to update the properties and settings of the Nav Item, including its publishing options, content and meta info.

The ‘Edit Content’ and ‘Edit’ icons look similar in that they both display a pencil; however, the ‘Edit Content’ icon shows a pencil **with a sheet of paper**. You can remember that the paper represents a page filled with **content**. Clicking the ‘Edit Content’ icon allows you to do just that: edit page content.

Clicking the **Trashcan** icon deletes a Nav Item from the CMS and your website. If any child items exist under your parent Nav Item, you will be deleting those as well. This is known as a “hard delete."

The CMS does not provide a recycle bin or way to recover a deleted Nav Item. However, there's no need to worry. Accidentally deleting a Nav Item is **nearly impossible** because the platform requires you to confirm the deletion by typing in the Folder name.

Additionally, you can set up CMS **user permissions** that do not include the ability to delete Nav Items. Later in this course, we will review the hows and whys of establishing user permissions. **We recommend that you disable a Nav Item rather than deleting it.** This option keeps the Nav Item in the CMS but hides it from visitors. This is a great because you can repurpose the Nav Item and its content in the future, saving you a lot of time.

Clicking the last icon in the Action column offers a dropdown with additional functions.

View Children displays the total number of child Nav Items connected to the parent Nav Item. These children are pages and links nested under the Nav Item on your website's navigation.

For example, the parent Nav Item 'Things To Do' may hold several child Nav Items under it. These might include Outdoors, Attractions, Nightlife or Arts & Culture. All of these items would display under 'Things to Do' on your website.

Your website's navigation supports three layers of Navigation: the parent Nav Item and two levels of child items.

The Action dropdown includes **View Drafts**. This option lets you see all the iterations of your Nav Item saved in Draft form. Clicking through to View Drafts provides details such as the creation date, page creator, and draft status.

You can also **Preview** a draft. This feature is great for collecting feedback because you can share a draft link with people inside or outside your organization, even if they are not CMS users.

Next in our dropdown options is **Reassign Item**. This feature lets you move a Nav Item from one Navigation Section to another. For example, let’s say you have an annual festival page that resides under 'Things to Do', but your team decides it would better serve visitors under 'Events'. Use the Reassignment feature to move that Nav Item -- and any child items attached to it -- from the ‘Things to Do’ Navigation Section to the ‘Events’ section.

While the ‘Reassign Item’ feature is helpful, Simpleview recommends using it sparingly. It’s always best to build your Nav Items in the appropriate section of the sitemap right from the start. Reassigning a Nav Item to a new sitemap section can create broken links. To fix that, you must also set up redirects in your CMS. We will show you how to create redirects later in this course.

Going back to the dropdown icon, notice that the last option is **History**. Anytime you create, modify or delete content within the CMS, it stores that information, including the user that committed the update. An item's History can help your organization manage its content more efficiently and improve team communication.

Nav Item **History** does not include changes to your page content, such as adding or editing widgets and panels. Instead, that history appears within Page Builder and the View Drafts grid.

Before we wrap up this lesson, let's discuss the buttons at the top of the page: Create New and Search.

The **Create New** button lets you create a Nav Item within your Navigation Section.

Search allows you to explore your entire Sitemap, regardless of the Navigation Section you are working in. This function is similar to the option supplied in the CMS Product Header. You can access all the filters available in the primary search, including Keyword, CMS tags, Type, Last Updated and more. The Search Filters ensure you will always find the Nav Item you seek if you have utilized the CMS organizational tools available.

Simpleview CMS

What is a Sitemap? - Transcript

It use to be so easy to get lost. You don’t want your visitors getting lost on your website do you?

In this lesson, I'll explain a Sitemap and why it is essential to your website. We will also learn how the Sitemap functions within your CMS.

Simply put, a Sitemap is the navigational framework for your website's content.

For your website visitors, your Sitemap shows the paths they can take to access your webpages. The Sitemap cohesively communicates your site's theme and intent to ensure visitors find the content you want them to discover. Just as you would provide walking or driving directions for tourists in your destination, your Sitemap delivers the same experience virtually for your website visitors.

Let's begin this lesson by accessing our **Sitemap** in the CMS Left Navigation -- aka, the **Left Nav**.

A Simpleview CMS can manage one or multiple website domains. For example, your destination may have a Spanish language website as well as an English language website. The Sitemap section on the left navigation lists the website domains available to you. Select the one you want to work with, most likely the **Primary** Sitemap.

After clicking your Sitemap selection, you will see another slide panel listing your website's **Navigation Sections**.

At the top of the list, you'll see Main Navigation. This Sitemap section typically contains Navigation Items, commonly called ‘Nav’ Items, that are intended for your primary audience: *leisure travelers*.

Main Navigation items display within the Header on your website and are commonly present on all of your site's pages. The Header includes Nav Items such as Things To Do, Events, Places To Stay, Restaurants, etcetera.

Main Navigation items provide dropdown functionality, exposing **Child Pages**, Drafts, a Reassign feature, and item History. We will discuss these options more in our next video lesson.

The next Sitemap section is titled **Secondary Navigation**. Nav Items built here are industry-focused. For example, pages that provide information for media, partners, and planners of conventions, meetings or weddings.

Secondary Navigation typically resides above the Main Navigation in your website's Header.

Our next Sitemap section is **Footer Navigation**. It is persistent at the bottom of your website's pages and can include links to contact information about your DMO, job opportunities and privacy policies, among other things.

The Main, Secondary and Footer Navigation Sections are the pillars of your Sitemap.

Your Sitemap also includes Microsites, Landing Pages and System.

Let's take a look at **Microsites** and **Landing Pages**.

Landing Pages and Microsites are not visible to your website visitors. In other words, they do not appear in your website's Header or Footer.

While Landing Pages and Microsites share similarities, these two sections serve different purposes.

Landing Pages are single pages typically used for marketing campaigns, contest rules or general information. Visitors can access these Nav Items with a direct URL, perhaps supplied in an email or via a link on your website. Because they are a single page of content, Landing Pages **do not offer child pages**, and they inherit the styling of your website.

A **Microsite** is a smaller version of your primary domain that allows you to create a purpose-driven site. For example, you may host an annual winter festival in your destination. Or a large conference. A Microsite enables you to create a custom home page, gather multiple child pages and build a unique Header separate from the one used on your main website. Having a unique Header ensures visitors can only navigate through the content your team has designed for an event. Microsites default to the look and feel of your primary domain; however, you can work with Simpleview to customize the style and colors of your Header, Footer and Collections to create a memorable experience for your visitors.

Like Landing Pages, Microsites will only appear in your Primary Domain's Header if you link to them.

The final Navigation Section is titled **System**. This section contains base pages or Nav Items that affect the core functionality of your website. These include your 404 page and pages designed to display content from your CRM, namely Listings, Events, and Coupon Offers.

In an upcoming lesson, you will learn how to set up a Nav Items within your Sitemap. The creation process is identical across the Sitemap for all Navigation Sections. The Navigation Section you choose determines where your newly created pages appears on your website.

Oh! There it is. Now it's time for me to go.

Simpleview CMS

Adding Video URLs - Transcript

I love watching videos! They really capture my attention and draw me in. I bet travelers and locals would enjoy seeing videos of *your* destination for the same reason.

Your CMS is ready to house the **video URLs** from platform-hosted videos. Let me take you through the easy steps to adding a new Video asset and organizing it for use on your website.

First, go to your video-hosting platform, YouTube or Vimeo. Copy the video's URL; you'll typically find the URL from the hosting platform's 'Share' button. Next, in the 'Video' section of your Asset Library, click the 'Create New' button.

From there, you will paste the URL into the top field that appears. Follow that by clicking the 'Import' button on the left. CMS uploads the file's title and thumbnail image, automatically populating the 'Thumbnail' and 'Title' fields for the video asset. Feel free to update them as needed.

For example, you may want to create and add a new thumbnail image for the video to suit your page content. Select the 'Edit' function from the dropdown menu below the Thumbnail to do this.

You have a field to assign **Credit** to your Video, ensuring videographers are acknowledged for their work.

Organization tools are also available: Internal Notes, Video Categories and CMS Tags. Let's say we have a video about Luxury Camping in Northern Florida. We could add information about which marketing campaign the video connects with in **Internal Notes**. Then we could add 'Short-Form' as a **Video Category,** and then create a new category, 'Marketing'. Lastly, we could add 'Luxury Camping' -- the title of our marketing campaign -- as a **CMS Tag** and also select our existing 'Beach' tag.

You'll only use the **geolocation fields** if you have the Asset Request and Media Gallery modules added to your CMS.

Before we finish up this video lesson, let me show you the two main design elements where you can use Videos: The **Video Player Utility** and **Collections Slides**.

The Video Player Utility displays your Video content in a lightbox on your web page(s). The Video Player Utility also provides advanced parameter controls such as Autoplay, Looping and the ability to toggle the playback operations on and off.

In an upcoming video, we will explain how you use Collection Slides to display your videos, so stay tuned! And that's a wrap. Was that ok?

Simpleview CMS
Adding Images - Transcript

Wow… Wow… Just think how boring this would be without pictures? Let's get started adding an image to your Asset Library!

At the top of the Image homepage, you'll find the '**Create New**' button. Before you click this, let's go over two **crucial best practices** for your image assets: Upload images with large dimensions. And, ensure the image resolution is **72 dpi**.

First, make sure your **image size** is as large as possible. Your organization may be working with a professional photographer who captures images of your destination with a DSLR camera. These professional-grade images may have pixel dimensions of 7952×5304. That's great! You want to ensure that you import images with the largest pixel dimensions possible.

Second, make sure that your **image resolution** is **72 dpi.** Image resolution is measured in dots per square inch (dpi), and 72 dpi is the "web-friendly" sweet spot. A resolution of 72 dpi guarantees your images will display clearly on your website. If you use a higher resolution, like the 300 dpi used for print materials, your webpage images will distort or pixelate. And we don't want that. We want your visitors to see your destination clearly.

Now that we've highlighted the best practices for image size and resolution, I want to introduce you to an integration that exists within your CMS: **Cloudinary**. The Cloudinary integration is a built-in, cloud-based image file management system that works within your CMS. It manages the different aspect ratios of images displayed on your website. Cloudinary automatically adjusts your images to fit your page templates. This is why it's best to import the largest image size. With Cloudinary's help, your images will be resized to look perfect.

All right, let's continue with the next steps in creating a new image!

So, we click the 'Create New' button and uploaded our large image with 72 dpi resolution. Now we can assign metadata, as well as add internal notes, image categories and organizational tags.

Metadata includes the **Title, Alternative Text** (Alt Text) and **Credits** associated with an image. The image **Title** should be something meaningful and useful. And, it's best to avoid long numeric strings. An excellent example of an image title is "Grand Canyon_Bright Angel Trail_Hero". This title provides detailed information about the image, including its intended placement on your website pages.

We're uploading an image of a field of poppies at sunset taken in our fictional destination, Simple City. We'll title it "Spring Sunset over Poppy Field" to capture the key features of the photo.

The **Credits** field is important because it ensures the photographer who captured the image is acknowledged. Also, some page templates display this information, so it's best to give **Credit** where credit is due. Our image was taken by Roman Grac, so we add his name in the Credits field.

The final metadata field is **Alternative (Alt) Text**. You must enter alt text for a few reasons. First, if the image fails to load, the text you enter into this field appears on your webpage instead of the image. Secondly, alt text helps screen-reading tools describe images to visually impaired readers. And lastly, alt text allows search engines to better crawl and rank your website.

For our image's Alt Text, we'll add "a sunset over field of red poppies in Simple City during Spring Spectacular."

After we've filled out our image file's metadata, we can add some organizational labels to the image. Your destination can use these fields to organize your assets and maximize your Search filtering options.

So let's take our image of a sunset over a field of red poppies. We'll use the **Internal Notes** to provide detailed information about **how** we're using this image and, perhaps, **where** it's being used on our website. For example, this image is being used for our area's local Spring festival -- Spring Spectacular -- and it's being used in our Spring activities blog post as well as our Spring Events page.

You can use the Internal Notes field to add any information you feel is important about this specific image asset.

For the **Image Categories,** we'll use the existing 'Blog' and 'Outdoors' categories, and we'll create a category for 'Festivals' which will apply to this festival and any other festivals.

Now, on to the **CMS Tags** field. You can add as many CMS Tags as apply. For our sunset image, we want to add the name of the specific festival, Spring Spectacular. That tag doesn't exist already, so we'll create and add it. Next, we want to add a seasonal tag, Spring, and perhaps the year, 2023.

As for the geolocation fields, you'll only use the latitude and longitude fields if you have the Asset Request or Media Gallery modules added to your CMS.

Now that you have assigned metadata, organizational tags and notes to your image, you can save your image with confidence! Your CMS does provides a 'Save & New' feature that allows you to create assets in rapid succession, which can save time in your workflow.

Once you've created your images in your Asset Library, you have two great features that enhance your image files: **Set Focus** and **Cloning.**

The **Set Focus** feature allows you to assign a focal point to images uploaded to your Asset Library. Using this feature ensures that an image adjusts to fit any template and that the image's focal point remains centered within that template. If you take only one thing away from this video, it should be **how to set a focal point for images**!

We'll walk through the process. For any image in your Asset Library, click the green caret on the image and select 'Edit. You will see a new screen labeled 'Update Asset Library: Image.' Click the blue caret in the 'File' field under the image thumbnail. Select 'Show Focus.'

Then click anywhere on the image that you want to be the focal point and select "Set Focus." It's that easy!

While we're on the subject of setting focal points, I want to highlight a use case for **Cloning an image** in your Asset Library. You may want to duplicate an image and set a **different focal point** from that of the original image. Say, for example, you have a great image that includes multiple people and one landmark in your destination. You could set the focal point on the original image to highlight the people, and then, duplicate the image, setting its focal point on the landmark.

Now, you can use this image for two versions of one image on your website. You also know that by focusing on the other side of the image, you would have an excellent image for the Things to Do page.

Make sure you make a distinction from the original image by way of the Title and Internal Notes fields. For example, your original asset might appear within the *body* of your website pages, while the cloned image with a different focal point appears within the large frame at the top of your page.

The Simpleview CMS also provides built-in image editing functionality via Toast UI Image Editor. This third-party integration allows you to perform basic image editing, manipulation, and filtration within the CMS. The available functions include crop, rotate, mask and filter.

Properly titling, adding Internal Notes, categorizing and tagging help everyone on your team know where and why an asset is being used.

(Flipping through the magazine) I can't wait to see all the beautiful images you add to your websites! See you next time.

Simpleview CMS

Using Internal Notes, Categories & Tags for Assets - Transcript

Can you imagine walking into a library or bookstore and asking for books about a specific topic, perhaps building websites, and the librarian or clerk just pointing to massive stacks of unorganized books and saying, "Over there"? That would be absurd! Preposterous! And frankly impolite.

Importing Images, Documents, Videos and External Links into your Asset Library **without** utilizing the organizational fields your CMS provides would be just as absurd!

Over time you will create thousands of Assets in your library. To help you locate and manage those Assets, your CMS offers Internal Notes, Categories and CMS Tags. If you choose not to use these tools, you will search for needles in haystacks, as the saying goes.

When you create new assets within your library, you are presented with several meta info fields that are without a doubt important for web searches and SEO. These meta data fields include Title, Credit and Alternative Text. In this lesson, let's focus on the organizational fields and tags that assist **you and others on your team** in locating assets within your CMS.

Internal Notes are an opportunity to supply you and your team with relevant information about an asset. I like to say that using Internal Notes is a way of paying it forward to others interacting with assets.

Suppose you are creating an Image for a Winter Festival in your area. The Internal Notes field allows you to insert details, such as how you're using this image and, perhaps, where it's being used on your website.

If the Image is used in a Hero Frame on your Winter Festival page, type that in the field. For example, "Hero Image on Winter Festival Page."

Additionally, the image may be included in a Blog Post. Great! Add that in the Internal Notes.

You cannot enter too many details. I guarantee your teammates will appreciate all the Internal Notes you supply.

Moving on, **Categories** are customizable tags that provide flexibility in your organizational journey.

These particular tags only work within the Asset Libary **section** in which you are creating a new item. Suppose I am importing a new image. In that case, the preexisting categories or the categories I create will be accessible only in the **Image section** of my Asset Library.

The Categories you create will represent your team's needs and organizational style; however, let me provide you with a couple of examples.

If you are importing Images for Blog posts, then using an Image Category of "Blog" would be advantageous. Doing so ensures that when anyone on the team searches for "Blog" using the 'Category' filter, they will find those Images tagged with the 'Blog' Category on the results page.

Announcements, campaigns, contests, festivals and page content all make excellent Categories.

Conveniently, these Category examples all apply to **Video** assets as well as Images.

You can add multiple Categories per asset, guaranteeing your Images, Videos, Documents, and External Links are searchable within their respective Asset Library sections.

For Documents, you could create categories like Maps, Tours, Stakeholders or Annual Report.

External Links may have Categories associated with where on the site they are used.

Again, these are suggestions. You and your team will determine the Categories that best fit your needs.

Lastly, we have **CMS Tags**.

This tag is robust and applies to more than just your Assets. CMS Tags appear throughout the platform and can be used with Nav Items, Blog Posts, Microsites, Maps and more.

CMS tags allow you to gather all these Assets and Items under a single umbrella.

Suppose your destination has an annual music festival that attracts many visitors and requires you to build a lot of content for your website. You know you will be building multiple landing pages, blog posts and a dedicated microsite. Each of these will require you to import many Images, Videos URLs, and Documents.

CMS Tags let you organize all your **content and assets** associated with the music festival under a single tag. Let me demonstrate as I search by the CMS tag, 'Simple City Music Festival'.

With this specific CMS Tag, I can search my Sitemap and find all the Nav Items assigned that tag. I can also search each section of my Asset Library and find anything and everything dedicated to the 'Simple City Music Festival' CMS Tag.

And, you are not limited to using just one tag; you can associate **multiple** CMS Tags with your content and assets.

We'll put that into practice by creating a "2024" CMS Tag for our Image. So, now we have **two** CMS Tags assigned to our image: 'Simple City Music Festival' and '2024'. You and your team can locate all the assets for that year's instance of the Festival. You can also find older assets and decide whether or not they need to be archived or even deleted.

As I said, CMS Tags are robust!

Now that you know the organizational tools and understand how they work, you can label your assets and content with confidence! And, your CMS searches will produce reliable and actionable results.

Simpleview CMS

Storing Images, Video URLs, Documents and External Links - Transcript

“Come and take choice of all my library and so beguile thy sorrow till the heavens...”
(Shakespeare’s *Titus Andronicus*, Act 4, Scene 1)

Aren’t libraries amazing places?

Your CMS provides an organizational system for housing the various assets that bring your website to life. We call this system the **Asset Library**.

Your CMS offers four distinct sections in the Asset Library: **Images, Documents, Video** URLs, and **External Links**. Think of it as the graphic novel section, the non-fiction section, the media or film section and the government section of your library. Understanding how these Assets function lays the foundation for your success when building pages.

Let's start with the **Images** section in your Asset Library, which undoubtedly gets used the most. Can you even imagine your website without images? Absolutely not, right? We all know images are the visual gateway to your destination.

Images allow your website visitors to picture themselves enjoying everything your area offers. Since a “picture is worth a thousand words,” the Asset Library in your CMS delivers exceptional functionality for managing image files and integrating them into your web pages.

When you enter the **Images** section of your Asset Library, you will see all files displayed by the date they were imported. By default, all images are arranged in a grid layout. However, you change the view if you prefer to see your images in a list.

Each image file appears as a separate thumbnail. The thumbnail's dropdown menu provides five actionable options: Edit, Clone, Archive, History, and a Where is This Used feature.

The **Edit** option allows you to update your file’s metadata, modify the image and set a focal point. We’ll explain metadata and demonstrate setting a focal point in our lesson about creating a new image.

The **Clone** feature duplicates any image file. Perhaps you want to alter an image's aspect ratio, apply a filter or set a different focal point. Cloning allows you to do these things without disrupting the source file.

Archive is a feature that allows you to move image files from the display you see on the Image homepage into a separate repository. Using Archive declutters your Image homepage so that you can focus on the image files you need to work with.

Once an image file is moved to the Archive, it cannot be used for new Collections. However, the image will continue to display in the Collections to which it was added. If the Archived image is needed for a new Collection, you can restore it and archive it again.

Deleting a file can only be done from the Archive repository. It is important to remember that deleting a file is a permanent action and cannot be undone. **Your CMS does not provide a trash or recycle bin.**

The **'Where is this Used'** feature. This function lets you access a list of all the Collections utilizing your image. This information can help you determine whether or not an image file can or should be deleted.

The final actionable option from the dropdown is **History**. Not the sort of History you learned in school but *when* an image was created or modified and by *whom*. This information can be helpful, for instance, when you want to audit images or assign image updates to staff members.

We'll finish up this introduction to your Asset Library by looking at the remaining asset types: **Videos**, **Documents** and **External Links**.

Videos immerse viewers in the sights, sounds and motions of your destination. These assets showcase your local attractions, cultural happenings and community spirit to leisure travelers in ways that traditional images cannot. Additionally, videos allow you to communicate your destination's story to event planners, increasing the potential of your selection for that next big conference.

The **Video** section of your Asset Library allows you to import **video URLs** from hosting platforms like Youtube and Vimeo. Your CMS does not store the raw video files.

The **Documents** section of the Library enables the import of many different file types, including PDFs, Excel files, Word documents, Text (or .txt) files, and PowerPoint presentations.

For instance, your destination organization may want to create a direct link to a walking tour or brewery crawl map for leisure visitors. No problem! You can upload your PDF directly to your Asset Library's 'Documents' section and then link on your website. Visitors will be able to view the map Document in their browser and will have access to download the file.

Documents might also include an annual financial report. You can upload the report as an Excel or Word file and then create a webpage with restricted access. Then, you simply link that report to the page.
The **External Links** section of your Asset Library allows you to create and manage URLs to domains outside your own. For example, you might include text highlighting a specific local attraction on multiple pages in your site's Events pages. If that attraction were to update its website's URL, you would have to find and edit each instance of the hyperlinks on your pages. External Links allow you to update the URL in one place, saving you a lot of time.

“Come and take choice of all my library and so beguile thy sorrow till the heavens, reveal the damned contriver of this deed, why lift she up her arms in sequence thus?”

Remember once you understand all the sections of your Asset Library amazing page building will follow. I’ll see you in the next video. (continues reading the line)

Simpleview CMS

Using Your CMS Dashboard - Transcript

[voice over] “Google Analytics to CMS. You’ve had 250 user visits to your website in the past half hour.” pause “CRM to CMS. We have six Listings without an image.”

Hello and welcome! In this video lesson, we’re going to walk around your CMS Dashboard. Well, not literally walk around, but virtually! The Dashboard is a bit like a command center. I’ll point out the metrics and productivity tools you have at your fingertips. Once you understand the power of your Dashboard, you’ll feel more in control of your CMS workflows.

Many first-time users are drawn immediately to the Dashboard area, with its several graphs. The ‘**At A Glance**’ dashlet displays some high-level statistics for your website, such as number of visitors to your website in the last 30 minutes and the average viewing session duration on your site over the past seven days. These figures reflect information from your destination’s Google Analytics account, which Simpleview connected during your CMS build.

The Dashboard’s **Stats** dashlet displays key information based on visitor traffic over the past month. Select from the Stats’ dropdown menu to display any of the six different metrics, including the user Age, Locations, and Social Referals.

The **Top Pages** dashlet, to the right, allows you to see the top 20 pages viewed on your website over the past month or the past week. Chances are that you’ll see your “Things to Do” pages rank within that top twenty!

Across the bottom of your Home Dashboard, you’ll see the **Site Activity** dashlet. This graph shows the number of new and returning visitors to your website over the past week, month or year.

Your CMS does have a work management tool, so you will see a **Tasks** dashlet in the upper left and an **Action Items** dashlet right below it.

As a CMS user, you can create tasks by clicking the plus sign ‘+’ button. You’ll also recall that you can create Tasks from the Product Header’s checkbox icon.

Tasks can be related to work in your CMS or something that is just part of your work day, like “Email Mark re: Lunch.” You can assign a Task to yourself or to another CMS user.

simpleview Brainery

For example, Tasks can be beneficial when you need to know what's required to get a marketing campaign page to go live. Or any other page or microsite, for that matter.

Your **Tasks** display organized by due date, until you mark them complete. To see all tasks for all users, including those that are complete, click '**See All**'.
The **Action Items** dashlet displays items you want to address to keep your site in good working order. However, your CMS User Role permissions determine what you see listed in the Action Items dashlet. For instance, update Events with images, and add geolocation information to Listings. These require access to the Simpleview CRM. Approval of page drafts may appear as an item in the dashlet, which requires CMS administrator permissions.

Action Items include touch points **within your CMS** as well as connections **between your CMS and your Simpleview CRM**. We'll look at examples of both kinds of Action Items.

Some Action Items refer to areas within your CMS platform, like the Public Relations Module or the Sitemap. These items inform you of unpublished Nav Items, Posts and Articles. You can take action by deleting these items or updating them with notes so that other team members know why they are unpublished.

Action Items also points to data that your CMS pulls in from your CRM and displays on your website. Now's a great time to go into a little detail about the connection between your Simpleview CMS and CRM. In basic terms, your Simpleview CRM, which stands for Customer Relationship Management, is a supercharged database. While your CRM holds meetings data, visitor inquiries and many other records, you, as a CMS user, can focus on three record types that feed into your website display: **Listings, Events and Coupo**n offers.

Your CRM refers to local business account records as **Listings.** These Listings have categories and subcategories, some of which can display on your website to help visitors filter their searches. All information related to your local businesses and attractions -- addresses, phone numbers, accessibility information, hours of operation, descriptions and even some images -- is managed and updated from your CRM. The **Leisure Events** and **Coupons** (Offers) are also housed in and managed from CRM.

So, if you see Listing- or Event-related Action Items, you can click the number that appears to the left of the Item. That link take you to your CRM and shows you all the Listings without an image or Events that need to be approved before they can go live to the website.

To learn more about your Simpleview CRM, we recommend taking the Brainery's **Member/Partner course**. You can also review the CRM Knowledgebase for more information.

Okay, I have some Tasks and Action Items to take care of, so we'll see you in the next video!

Simpleview CMS

Navigating Your CMS - Transcript

Hello!

Before we can explore the features of the CMS, we need to understand its static elements—the persistent components that allow us to find our way through the platform and serve as core functionality. So, grab your hiking stick and water bottle, and let's get on our way!

The Product Header, Left Navigation (Left Nav) and User Resources are guide posts that will always be present while you work within the platform. They will get you where you need to go and help you find almost anything inside the CMS platform. You might even consider them your basecamp.

With this in mind, let's begin at the top, so to speak, with the **Product Header** and, more specifically, with the Simpleview name with logo. From this logo, we will work our way to the right until we've reached the end of the Product Header.

The first element we encounter is the **Product Switcher**. You will know when you see it because it tells you you are in the right place, the CMS. The Product Switcher is a dropdown menu that displays other Simpleview products available to your organization.

For example, by clicking CRM in the Product Switcher dropdown, you can dive directly into that platform. This product-to-product connection is beneficial if you work with listings or events. Suppose you are working on your website's events page and realize you need to update details about a specific event. The event details are stored in the CRM, a super-charged database. The Product Switcher lets you access the CRM immediately to make your changes to the event. Fortunately, the CRM also provides you the ability to jump back into the CMS so that you can finish your work.

Next, you should see **your organization's name** in the Product Header. If you don't, please stop what you are doing and contact your CMS administrator.

As we continue our journey to the right, we encounter the name of the **User** logged into the CMS. You should see your name here.

Click the '**Logout**' function next to your name to sign out of your CMS account.

Our next element in the Product Header is the **Tasks** icon. Your CMS provides a work management feature in the form of Tasks, which you can access here.

Clicking on Tasks opens a tray displaying all Tasks you have created for yourself and any Tasks teammates created and assigned to you.

You'll see a **Tasks dashlet** within your CMS Dashboard, but accessing Tasks from your Product Header means you can create Tasks from wherever you are within the platform. You don't need to return to the Tasks dashlet on the Home page to create each new Task.

Suppose you are working on a page and realize you need images to finish. Clicking the Tasks icon in the Product Header lets you create a task for yourself with all the necessary information you'll need. No need to leave the page you are on and go back to the Home page.

Next to the Tasks icon, notice the **small red box with a number inside**. This indicator lets you know how many unresolved Tasks you have.

The last element in the Product Header, **Search**, is immediately recognizable by its magnifying glass icon.

Clicking the Search icon gives you a field for entering a keyword and a dropdown that provides access to the sections of your CMS, including Sitemap, the default option, Asset Library sections, the PR Module and Collections.

I'll use the default **Sitemap** option and enter the keyword "events" into the Search. A new screen titled 'Sitemap Search Results' appears, along with any results. Notice that I have a multitude of filters so that I refine my Search.

Remember that using this Search feature is often more convenient than clicking through the CMS to find what you want.

Okay, now we can trek over to the Left Nav.

The Left Nav displays the following icons: **Home, Sitemap, Assets, Modules** and **Settings**. Each of these leads you to different sections of your CMS. Each section serves you many options for managing your website content and CMS.

Home will always bring you back to the CMS Dashboard. If that's where you are when you click Home, then the metrics in the Dashboard will refresh.

Sitemap takes you into your primary domain and all the Navigation Sections and Nav Items that live within. This section is where you will do most of your work with CMS, including updating and creating your website pages, landing pages and microsites.

Sitemap is very important; we will discuss it at length later in this course.

The **Assets** icon provides entry to your Asset Libray and its sections, which include Documents, External Links, Images and Video.

Each Asset section allows you to create and manage all the resources to make your website genuinely spectacular for your visitors.

Later in this course, we will review the Asset Library and all the benefits each section brings to your CMS experience.

Modules is a Left Nav item that is unique to your organization. It houses a couple of standard Modules and any that your team has added to extend your CMS's functionality.

This Navigation area is where you manage **Collection Types** and **Public Relations** Articles.

The most common add-on Modules include Public Relations Blog. Others include Map Publisher and Dynamic Content.

We will cover the standard Modules in this course and some add-ons so you can see how it is possible to expand your CMS capabilities.

Our last Left Nav item is **Settings**. Here we can create and manage CMS Users, set up Redirects, produce page layouts, manage Tags, and more.

Many Settings are limited to CMS Administrators (Admins) at your organization; however, this course will touch on the options available to most Users.

The next guide post is **User Resources**, located in the lower right corner of your CMS. Just look for the Simpleview trident.

Click on the trident, and User Resources will appear with several useful items, including SimpleFeed, Tip of the Month, Knowledgebase, Walkthrough Guides and Need More Assistance.

SimpleFeeds are brief articles that provide an overview of new features and enhancements to the CMS.

Tip of the Month provides tips & tricks for working in the platform and explanations of CMS features and functions. As the title suggests, these Tips are published monthly and always link out to relevant Simpleview CMS Knowledgebase articles.

Speaking of the **Knowledgebase**, that is our next item in User Resources. Clicking this option will take you directly to the CMS Knowledgebase, which provides a wealth of documentation to ensure your success in the CMS platform.

The final User Resource item is **Need More Assistance?** option. Clicking here takes you to the Client Portal, where you can submit a Support Request (a.k.a ticket) to Simpleview.

As Simpleview releases new items for your review, the Simpleview Trident will show a pulsing badge indicating the total number of unread notifications. Click the Simpleview Trident to read those notices.

Now that we've explored how the Product Header works, what's in the Left Navigation and how you can access User Resources, it's time to stroll over to the CMS Dashboard!

Simpleview CMS

How Do I Log in to CMS? - Transcript

Enter password… hmmm… 12345? Nope… the rain in Spain? Nope… oh, hello!

In this short video, I'll show you how to log in to your CMS.

You'll start by entering your destination organization's name directly in your browser's URL field, followed by "**.**simpleviewcms.com." This URL should take you to your CMS login page.

For example, **simplecity.simpleviewcms.com** would be a valid path to access a CMS built for the fictitious destination, Simple City.

Next, on the CMS login page, enter your email address in the 'Username' field and your password in the 'Password' field, then click the 'Login' button.

If you do not know your password, click the 'Forgot Password?' button. After entering the email address associated with your Simpleview CMS account, select the 'Reset Password' button. You should receive an email with a temporary password to log in to the CMS.

Okay! Now that you've logged in, you are ready to explore your Simpleview CMS.

And now I can get back to logging into mine… Veggies R cool? And we're in!

Simpleview CMS

What is Simpleview CMS? - Transcript

Well, uh that works… Hey! Hello!

We’re so glad you’re here to learn how to use your Simpleview CMS. Let me set this down and we can begin.

Let’s start off with the acronym C-M-S. It stands for Content Management System. Your CMS is quite literally a **system** that allows you to **manage content** on your organization's website. And while that may sound simple, the benefits of your CMS are anything but.

Your CMS empowers your organization with functional tools to target audiences visiting your website. From leisure travelers to meeting planners and convention attendees, CMS ensures you can create a direct path to the information your visitors need.

Among the many advantages your CMS provides, perhaps the most critical one is driving traffic to your partners. Your CMS enables you to categorize and spotlight any local accommodation, restaurant, attraction, or business on your website. Your website is connecting visitors with the places and services that will potentially convert them to real-life visitors.

In the same way, your CMS can present visual highlights and RFP-related content to persuade meeting planners that your destination offers what they need.

Simpleview designed its Content Management System (CMS) for Destination Marketing Organizations. DMOs, as they are commonly known, are your destination organization’s peers in the Travel and Tourism industry.

Simpleview created your CMS by combining digital marketing best practices with DMO feedback to help you easily manage your organization's website and, by extension, how the world sees your destination.

Your CMS is a software-as-a-service (SaaS) product. SaaS eliminates the need to install and maintain your CMS locally. Instead, Simpleview developers work to improve your CMS and can seamlessly push product enhancements. All you need to do is enjoy the benefits the CMS has to offer.

The direct integration of your CMS with Simpleview CRM enables your website to seamlessly display business listings, events and coupon offers, all with the most up-to-date information provided to your destination by your area businesses. This course will explain the key CMS-CRM connection points.

This course also highlights some of the fully-integrated solutions CMS offers. These solutions include our digital marketing opportunities platform -- Destination Travel Network (DTN) -- and our in-market guide solution, VisitApps.

CMS integrates with various services, too, from Google Maps to Tripadvisor, allowing you to provide trusted third-party information to your website visitors.

Later lessons in this course will explain key CMS Tools:

We'll show you how to add images, video URLs and documents to your Asset Library.

You'll learn how to enliven your listings, events, blog posts and more using **Collection Feeds.**

Regardless of your comfort level now, by the end of this course, you will know how to access and use all the core tools your CMS provides. You'll also learn some advanced CMS functionality.

Your CMS is **the** toolkit you'll use to consistently communicate your destination's story to your intended audiences. So, let's get to work exploring the powerful tools within your CMS.

Oh that looks right…

SIMPLEVIEW CMS

SIMPLEVIEW CMS

Course Glossary

TERM	DEFINITION
Action Items	Alert items located on the Home Dashboard that identify potential problems with any associated website content.
Asset	A catch-all term referring to all materials used to create a Nav Item Page in the CMS; “assets” typically refer to the images, videos and documents stored and managed in the system.
At A Glance	A section of the Home Dashboard that provides information to all CMS users about the DMO’s overall web presence and activity.
Cache	When a computer temporarily stores data in a computing environment to reduce the latency of active data. This results in higher performance for a system or application.
Collection	An aggregation of related assets and corresponding data that can be displayed or linked to on website pages.
Content	The topics, ideas, facts or statements on a webpage or website. Content is published in the form of text, images, audio, and video.
CMS Knowledgebase	This is Simpleview’s repository for articles explaining CMS features and functions. You can access the CMS Knowledgebase by clicking the Simpleview trident in the lower right corner of the CMS platform.
CMS Tags	An organizational tool used in the CMS to classify Nav Items, Assets, Public Relations Articles and Posts. CMS Tags are a search filter option and pull content into Collection Widgets.
Dashboard	Accessible from the Home screen, this central area provides notifications for tasks, action items, and site statistics.
Destination Marketing Organization	A representative organization responsible for promoting the economic development of their community through travel and tourism; also referred to as a DMO.
Dynamic Content	Dynamic Content refers to web content that changes based on the behavior, preferences, and interests of a user. And it has an automated component, meaning once a behavior is recognized, new content is immediately presented that fits the user's profile or persona.

Evergreen	Content that is relevant and useful at all times. Not bound to specific events, seasons or otherwise time-bound.
Feed	This Source Type selection pulls data from Simpleview CRM and CMS into Widgets for display in web pages. Examples of Feed types include Events, Listings, Blogs and Nav Items.
Folder	In the Simpleview CMS, the term 'folder' refers to the URL path for a Nav Item.
Frame	An area in Page Builder representing sections of a website page e.g., Header, Content, Footer. These sections contain elements that allow you to create and edit content displayed on your pages.
Landing Pages	This term refers to both the Navigation Section (i.e., **Landing Pages**) within the Primary Sitemap of CMS and each Landing Page itself, viewable as the Child Pages from the Navigation Section's dropdown menu. These do not display within the website navigation sections. They are not going to be indexed within their website's visible navigation sections (i.e, Main, Secondary and Footer). Destination organizations often set these these Nav Items (Landing Pages) as not visible on their website.
Left Navigation	A series of clickable icons located on the left side of the CMS page used to access various areas and tools in the system. Left Navigation Icons are available at all times, no matter where you are in the system.
Link	Short for *hyperlink*; a Nav Item in the Simpleview CMS that connects to a website Page, either inside or outside the CMS.
Metadata	In the Simpleview CMS, the term Metadata is used to reference Information that describes the page content when it appears in search engine results and on social media.
Microsites	A grouping of Landing Pages nestled under a parent Nav Item with a header navigation that differs from the primary domain
Nav Item	Nav Items are not the actual Pages on the website, but rather, they are the navigation structure of your site; in the Simpleview CMS a Nav Item can either be a Page or a Link.
Navigation Section	The areas of a CMS Sitemap organized by content and audience, including the Main Navigation, Secondary Navigation, and Footer Navigation.
Open Graph	Open Graph data is similar to metadata, except it primarily works with social networks such as Facebook, Twitter, LinkedIn, and Pinterest. Open graph data controls how information displays from your organization's website to social media sites by interpreting the content and displaying it in an optimized way.
Page	A Nav Item Type in the CMS that contains content.
Page Builder	A CMS feature that allows users to create, edit and view website page content.

Panel	A container providing the structure for page elements that display on website pages. Examples include single, double or triple column page Panels.
Persona	A representation of a website visitor's interests determined by the pages and content the visitor clicks through, opens and returns to when visiting the destination's site.
Profiles	A representation of website visitor's geolocation in relationship to the destination website.
Product Header	The top bar of your Simpleview CMS where your Product Switch, organization name, username, and Search are located.
Product Switch	The drop-down located to the left of your organization's name in the Product Header that allows you to easily navigate between the various Simpleview products used within your organization.
Site Activity	A graph located at the Bottom of the Home Dashboard that visually demonstrates the number of visitors that are new or returning to your website.
Sitemap	A hierarchical navigational framework for your website content.
Starting Panel	A template used to structure and format a new page in the CMS Sitemap.
Stats	A section of the Home Dashboard that communicates information from the DMO's Google Analytics account, summarizing the demographic averages of your site's visitor activity over the past 30 days.
SEO	An acronym for Search Engine Optimization; The process of affecting the online visibility of a website or a web page in a web search engine's
Tasks	A management tool used to assign and track activity within your Simpleview CMS. Tasks can be accessed in the Product Header or the Home Dashboard.
Top Pages	An area of the Home Dashboard that lists the 20 most trafficked pages on the DMO's website.
User Resources	User Resources appears as a Simpleview trident icon in the lower right corner of the CMS platform. This icon displays on each page as you navigate through your Simpleview CMS. You can access the CMS Knowledgebase, Support Requests via the Client Portal, SimpleFeed posts, and product use tips.
Vanity URL	A descriptive, memorable and pronounceable URL usually used to redirect URLs from one location to another; a long URL that has been converted into a customized short link.
Widget	A CMS feature that allows users to create, edit, preview and publish website page content.