# VPANEL™ & POWERWEB™ 5.0 TRAINING GUIDE

## VERSION 1.1

AS PREPARED BY: VGM FORBIN

# PREFACE

VGM Forbin's proprietary content management system (CMS) known as the VPanel™ provides our clients with the ability to update and maintain their website - often without the need for any additional software. But just as web technologies are continuously evolving, so too does our VPanel. While this functional training guide does try to assist with all variations of our VPanel, there is a chance of some slight variances and/or discrepancies between this and what you are utilizing.

As our products evolve, we will continue to update this training guide. If you are not finding the instructions you are looking for, within this variation of the training guide (currently 1.1), please feel free to reach out to customercare@forbin.com

# TABLE OF CONTENTS

# LOGGING IN

## Secret Link

The "secret" link to your website's VPanel can be found in the copyright area (at the bottom of any page) where you find your Business Name (Forbin Bank). Click on your name and then a new tab/window will open to the VPanel login screen. (**PLEASE NOTE:** secret link may not work on all sites per client request.)

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## Direct Link

In most of our sites, you can also get to your VPanel simply by typing "www.yourdomain.com/vpanel"
(replace yourdomain.com with your actual domain name).

www.yourdomain.com/vpanel

Search

## What to do if you can't seem to get logged in

If you get locked out of your account or can't seem to get logged in, your first and best option is to click on "Forgot username or password?" You can also reach out to customercare@forbin.com and our team will be able to manually reset your password.

### VPanel Admin Panel Sign In

Please enter your username and password.

Username

Password

Sign in          Forgot Username or Password?

← Back to your website

### Forgot Your Password?

Enter your E-mail associated with your account.
To close: click Cancel or use the ESC key.

OK          Cancel

# HOME SCREEN OVERVIEW/DASHBOARD

When your site is in the development phase, a.k.a. the "Staging Phase", your dashboard displays different information. For instance, your web address has ".forbinhosting.net" in it and your Google Stats aren't displayed because we haven't connected your new site to your Google Profile ID. Once your site has launched, you will notice your Google Stats providing analytics for your site.

Your basic account information will be displayed here

30 Days Visits will show the amount of traffic in sessions that has viewed your website.

**Forbin Customer**
http://yourdomain.forbinhosting.net

1 👤 **Account Information**

Name: Forbin Customer
Username: forbinusername
Last Password Change: 12/23/17 3:42 pm
Last Login Date: 01/19/18 3:42 pm

🗠 **30 Days Visits**

No Google Profile ID Provided

2 🎤 **Form Notifications**

| | |
|---|---|
| Business Loan Application | 0 New |
| Catalog Product Request | 1 New |
| Contact Form | 1 New |
| Deposit Account Application | 0 New |
| Home Equity Application | 0 New |
| Loan Application | 0 New |
| Quick Form | 0 New |
| Blog Comments | 0 New |

✈ **Weekly Page Views**

No Google Profile ID Provided

👤 **Traffic Sources**

No Google Profile ID Provided

📊 **Top Visited Pages**

No Google Profile ID Provided

3 ⚡ **User Administration**

Manage Users
Create Users
Audit Log

Weekly Page Views shows the amount of individual views to the pages on your website.

Traffic Sources shows where the traffic came from if from the top four sources or search engines.

Top Visited Pages shows the top pages that users have visited on your website.

User Administration grants you quick links to Manage Users, Create Users and view ALL of the audit logs relative to the site.

The Form Notifications area shows a (clickable) list of all the forms you have installed, as well as how many new form submissions you have since you last read your form submissions.

# PAGEBUILDER

There are options on the left side Navigation to utilize, such as: Pages, File Uploads, Assets, Recycle Bin and URL Redirects.

## PageBuilder Pages Overview

Pages shows you all of the PageBuilder pages, links and/or documents that have been created as part of the navigation. You can add, edit or delete a page; add, edit or delete a link; and add, edit or delete a document in the Pages view.

File Uploads

Assets

Recycle Bin

URL Redirects

You can add top level pages, external website links and document links via these buttons

## Editing a Current Page:

Start by hovering over the Page's row to reveal the Edit option on the right side. On the Home Page row, "Edit" is the only option.

Edits a Current Page

Hover over other page rows to see the Edit, Delete and Addition options.

You can add subpages, documents and sub links via this area

If you delete a page, it is sent to the Recycle Bin

Edits a Current Page

## Editing the Page Content

To make edits to current page content, hover over the desired page row and click Edit on the right side of the row. (see previous)

### Adding & Editing Text

When you want to add or edit text, you can simply type the text in the box or choose from the Paste options. You can also select different Headings, Fonts, Sizes, Color, and so on (**PLEASE NOTE:** your site has been designed by experienced UX Designers to be visually concise.)



*Definitions/Explanations*

- ⓘ **Paste Normal (Ctrl+V [Windows] or ⌘+V [Mac]):** Standard paste option, will often pull in exterior formatting if you copy from a website or Word Document. If you copy and paste from a website, you may notice that what you pasted may have some of its original formatting mixed in with your site's formatting.

- ⓘ **Paste as Plain Text:** Pastes content but removes all formatting which allows you to then style the content based on the site styles or your own.

- ⓘ **Paste from Word:** Allows you to paste content from Microsoft Word and maintain original content structure and formatting. It automatically detects Word content and transforms its structure and formatting to clean HTML.

- ⓘ **Content Styles:** Allows you to apply preset styles (implemented by your design team) to content within the editor.

- ⓘ **Formatting:** Implements standard HTML formatting, IE: H1, H2, H3, H4, Paragraph, etc.

- ⓘ **Font:** Allows you to change your typeface from the font family applied by your design team to an alternate font. Important **NOTE:** not all font families are available to all operating systems, devices, etc.

- ⓘ **Font Size:** Allows you to adjust your font size from the predefined styles (implemented by your design team). Important **NOTE:** font sizes appear differently across devices and can also be controlled by your site visitors based on their own web browser preferences

- ⓘ **Text Color:** If you want to change the color of sections of content, specific words, etc., highlight your content and then adjust to the color you prefer. Important **NOTE:** Some colors do not display well with your design and may cause issues with legibility for some users especially those with visual impairments.

### FORMATTING TEXT VIA PREDEFINED SITE-WIDE STYLES

Format text that fits within your site design by choosing from the different heading selections (via the format drop down) to apply to your text. "Normal" is the standard Paragraph formatting as set by your UX/UI Design Team.

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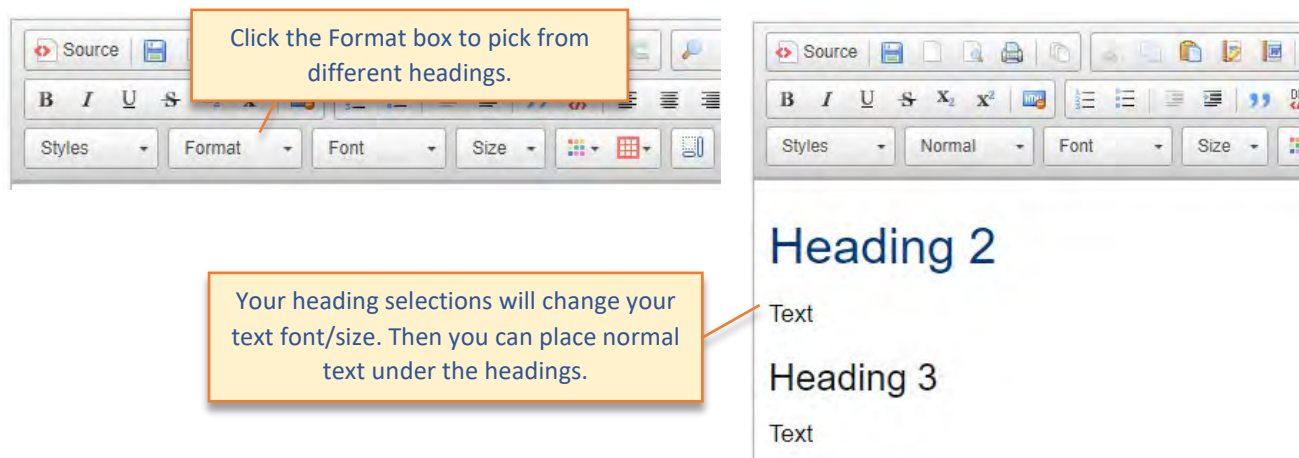
## Adding Images & Other Media

To add an image, start by clicking the Image button shown below.

Add Images

Add YouTube Videos

Add YouTube Videos

Clicking on the "Add Image" or double-clicking on an image within the content will open the following Image Properties dialogue box

If you have a direct path to an image from another website, you could paste it here. For instance: https://www.cedarvalleyalliance.com/images/logo-cedarvalley.png

Width and Height should be left blank so they can resize appropriately when viewed on multiple devices.
**If you need to resize your image, please do so before uploading to the server. It will be beneficial when it comes to load times**

Border Thickness, not color, is controlled by this field via number

HSpace & VSpace = Horizontal & Vertical Space (Padding) around your image

If you know your image is already available on the server, click on "Browse Server"

Alternative Text is beneficial for search optimization, accessibility and more. Learn more: https://moz.com/learn/seo/alt-text

Left or Right, this will allow the image to move and the text to wrap around it.

**Image Properties**

Image Info | Link | Upload | Advanced

URL

Browse Server

Alternative Text

Width

Height

Border

HSpace

VSpace

Alignment
<not set>

Preview
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas feugiat consequat diam. Maecenas metus. Vivamus diam purus, cursus a, commodo non, facilisis vitae, nulla. Aenean dictum lacinia tortor. Nunc iaculis, nibh non iaculis aliquam, orci felis euismod neque, sed ornare massa mauris sed velit. Nulla pretium mi et risus. Fusce mi pede, tempor id, cursus ac, ullamcorper nec, enim. Sed tortor. Curabitur molestie. Duis velit augue, condimentum at, ultrices a, luctus ut, orci. Donec pellente augue in cursus

OK | Cancel

This URL is your destination URL (when a user clicks on the image)

Target is related to the destination Browser Window/Tab (open a new window/tab, top tab, same tab or parent. New and Same are the most common in use these days)

**Image Properties**

Image Info | Link | Upload | Advanced

URL

Browse Server

Target
<not set>

If you wish to, you can link to other pages, documents and images that reside on the server

Choose a File from your computer

**Image Properties**

Image Info | Link | Upload | Advanced

Send it to the Server
Choose File | No file chosen

Send it to the Server

After uploading the image, click the Send it to the Server button.

**Image Properties**

Image Info | Link | Upload | Advanced

If there is a value in this field, DO NOT CHANGE IT

This field is for advanced and extended descriptions of an image that Alt Text and Advisory Titles cannot include due to character count restrictions

If your image has a particular class applied, it was done so by one of our developers and should not be modified

These Language fields are rarely, if ever, modified

The Title of the Image
For instance, if it were a picture of the McDonald's "M" logo, the title would be "The Golden Arches" or "McDonald's M Logo". Adversely, Alt Text is meant to describe something, "A photo of the McDonald's M Logo, also known as the Golden Arches"

Id | Language Direction Language Code
<not set>
Long Description URL
Stylesheet Classes | Advisory Title
Style

You can add custom inline styling to the image
For instance, if you chose a left or right alignment from the Image Info tab, then you would see float: left; (for left) or float: right; (for right)

## Adding Hyperlinks & Anchor Links

There are several ways to add links to content within the editor (not including the image as a link):

- Link to an existing page in the PageBuilder view
- Link to a specific URL
- Link to a document/file
- Link to an anchor within a page
- Link to an e-mail address
- Create an anchor within a page

You can add a link after highlighting the word or phrase and then clicking the Link button you'd like to be linked.

Link to a Page
A list generated by the pages in your PageBuilder

Add an Anchor

Add a Link

After clicking the Add a Link button, you will see the Link Info dialogue box with four tabs to cycle through, however, the first two are the most common you will make edits to.

**Link**

Link Info | Target | Upload | Advanced

Choose the link type:
URL (web address, page, etc.), Anchor within a page, or Mailto (email address)

Browse Server:
You can link to documents or other file formats (images, ZIP file, etc.) that reside in your file manager

Link Type
URL

Protocol | URL
http://

Browse Server

Type or Paste (Ctrl+V [Windows] or ⌘+V [Mac]) a web address here. The Protocol will adjust accordingly.

OK | Cancel

*Definitions/Explanations*

ℹ️ **<not set>** = Sets to default browser settings

ℹ️ **<frame>** = Not very common these days, defaults to browser settings

ℹ️ **<popup window>** = Opens an actual new window, but not what most consider to be a popup window

ℹ️ **New Window** = Opens a new tab, or a new window if the browser doesn't support tabs

ℹ️ **Topmost Window** = Opens an actual new window, not used very often anymore with browsers that support tabs

ℹ️ **Same Window** = Opens the link in the current tab/window. Ideal for linking to pages within your own site

ℹ️ **Parent Window** = Much like the "Same Window", it opens the link in the current tab/window. Ideal for linking to pages within your own site

**Link**

Link Info | Target | Upload | Advanced

Target
<not set>

<not set>
<frame>
<popup window>
New Window (_blank)
Topmost Window (_top)
Same Window (_self)
Parent Window (_parent)

OK     Cancel

---

**Link**

Link Info | Target | Upload | Adv

Upload
Browse...  No file selected.

Send it to the Server

**Upload a File:**
You can upload documents or other file formats (images, ZIP file, etc.) into your file manager if they are not already there.

OK

**ID & NAME:**
If there is a value in here, DO NOT REMOVE IT. These fields are for more advanced link interactivity that often connect to scripts.

**The Title of the Link**
This is the text that appears when you hover over a link, often referred to as "helper text" It's also essential for SEO performance and accessibility compliance.

If your link has a particular class applied (like "button"), it will alter the appearance of the link to look more like that class.

**Link**

Link Info | Target | Upload | Advanced

Id

Name

Advisory Title

Stylesheet Classes

Relationship        Style

Language Direction   Access Key
<not set>

Language Code        Tab Index

**NOT TYPICALLY USED**

Advisory Content Type

Linked Resource Charset

**Add custom inline styling**
If you have made adjustments to the style of this link, the inline styling will appear here.

---

## ANCHOR LINKS

Anchor links help users jump to a specific part of a page. This is particularly useful when there is a lot of content on one page, (for instance, a non-dynamic FAQ page). You can use anchor links to help your readers navigate to a specific section of your content without having to scroll. First you'll insert an anchor in the section you want to link to, then you can add a link that takes visitors directly to this anchor.

Add your text after the automatically inserted #, then click "OK" and you're all set to create a link to it via the Hyperlink option.

**Anchor Properties**

# = Anchor. This will be automatically added by our system

**Anchor Name**
#AnchorLink-No-Spaces

Add a relevant Anchor name and be sure to not use any "spaces" (instead, use a hyphen or nothing at all) IE: #AnswerToQuestion1

OK     Cancel

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## Advanced Editing Options

Every so often, you may need to make edits to the source code of your page or you may wish to adjust your Meta Data.

### Page Settings

Edit your page settings by clicking the Settings button at the top of the page.

**Modify Page**
Editing Solutions

Click the Settings button on your current page you wish to change.

⚙ Settings | 🔍 Preview | 💾 Save | 📲 Publish

Title * | Solutions | Asset Library

From here, you'll be able to change the following Page Settings and SEO content/settings.

**FILE UPLOADS**

**ASSETS**

Edit the navigation name, sub-text and Direct URL.

**URL REDIRECTS**

**Page Settings**

Nav Name * | Products & Services
Sub Text
Direct Url | products
Preview Direct Url | http://yourdomain.forbinhostin
Show Bread Crumb | ● Yes ○ No
Show in Nav | ● Yes ○ No
Status | ● Active ○ Inactive

Select yes or no to show the breadcrumb, the page in the navigation, or select active/inactive for the status of the page.

Edit the Meta-title, Meta-keywords and Meta-description.

**SEO Settings**

Meta Title
65 Characters Remaining
Meta Keywords
155 Characters Remaining
Meta Description
155 Characters Remaining

**Parent**

● [ Root Level ]
○ Members
  ○ Member Login
  ○ Change Password
  ○ Address Book
  ○ Update Account
  ○ Member Registration
○ FAQs
○ Contact Us

Pick the parent of the page to allow the page to be shown in other areas.

**Layout Options**

Left Column | Three Column
Right Column | One Column
Split Column

Change your page layout here.

**Revision History**

| Date | User | Options | | |
|------|------|---------|---|---|
| 12/27/17 9:34 AM | @forbin-admin | Open | Compare | View |
| 12/27/17 9:24 AM | @forbin-admin | Open | Compare | View |
| 07/31/17 9:07 AM | @forbin-admin | Open | Compare | View |
| 07/30/17 5:46 PM | @forbin-admin | Open | Compare | View |

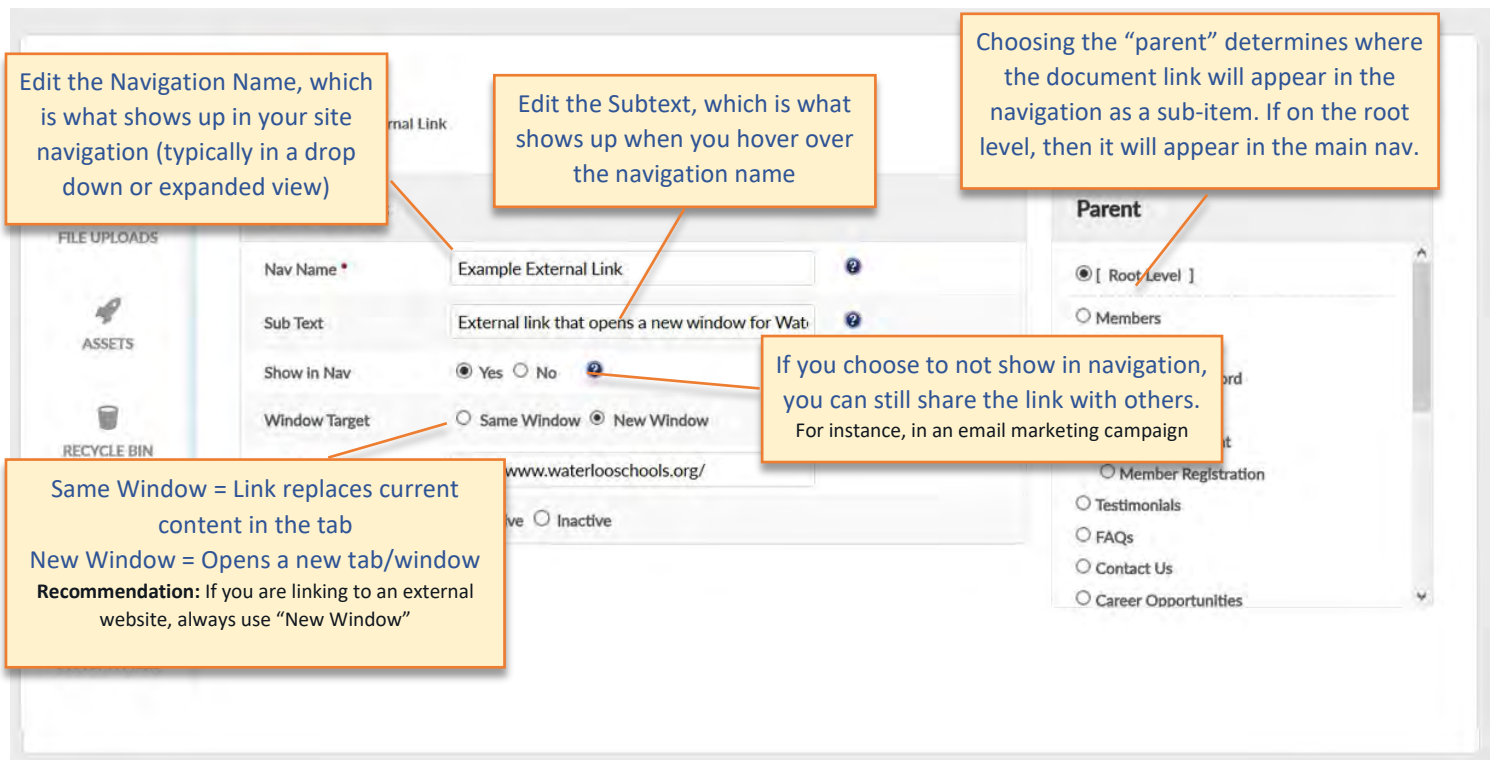View revision history, compare and restore previous versions

## Source View

Edit HTML source code with this option. **NOTE:** This editing feature should be reserved for those comfortable with editing source/HTML code, but it can also aid in learning how to understand source/HTML code.

Click the Source button to toggle between Normal and HTML view

```
<div class="maincontent clearfix">
<div class="main eightcol">
<p>Our team of dedicated web professionals is ready to answer any questions you have about the <a href="/products" target="_se

<div>**CONTACT-FORM**</div>
</div>

<div class="fourcol last support-column sidebar">
<h4><img alt="Phone Icon" src="/uploads/userfiles/files/images/icon-support-phone.png" style="width: 18px; height: 18px;" />&n

<hr />
<p>If you need assistance with your email, internet service or phone network, please call our toll-free number.<br />
<br />
<strong>Phone:</strong> 319-274-4430 <br />
<strong>Toll Free:</strong> 877-814-7485<br />
<strong>Fax:</strong> 319-274-4429 <br />
<strong>Toll Free Fax:</strong> 877-389-8420</p>

<p> </p>

<h4>LOCATE FORBIN</h4>

<hr />
<div class="widgetbody cf">
```

Edit your HTML information.

## Editing a Current "PageBuilder Link"

Edit the Navigation Name, which is what shows up in your site navigation (typically in a drop down or expanded view)

Edit the Subtext, which is what shows up when you hover over the navigation name

Choosing the "parent" determines where the document link will appear in the navigation as a sub-item. If on the root level, then it will appear in the main nav.

If you choose to not show in navigation, you can still share the link with others.
For instance, in an email marketing campaign

Same Window = Link replaces current content in the tab
New Window = Opens a new tab/window
**Recommendation:** If you are linking to an external website, always use "New Window"

FILE UPLOADS
ASSETS
RECYCLE BIN

Nav Name •    Example External Link
Sub Text    External link that opens a new window for Wat
Show in Nav    ◉ Yes ○ No
Window Target    ○ Same Window ◉ New Window
www.waterlooschools.org/
ve ○ Inactive

**Parent**

◉ [ Root Level ]
○ Members
○ Member Registration
○ Testimonials
○ FAQs
○ Contact Us
○ Career Opportunities

# Editing a Current "PageBuilder Document"

Edit the Navigation Name, which is what shows up in your site navigation (typically in a drop down or expanded view)

Edit the Subtext, which is what shows up when you hover over the navigation name

Settings    Preview    Save

Parent

Nav Name *    School Brand Guide

Sub Text    PDF of the School Branding Guide

Show in Nav    ● Yes  ○ No

List of Documents    Choose One...

WlooCommSchools-2010Brand-Guideline.pdf

○ Mortgage Qualification Calculator
○ Loan Consolidation Calculator
○ Retirement Longevity Calculator
○ Business Loan
○ Deposit Account Application
○ Email Disclaimer
● School District

If you choose to not show in navigation, you can still share the link with others.
For instance, in an email marketing campaign

ASSETS

RECYCLE BIN

URL REDIRECTS

SYSTEM PAGES

Upload Document

Status

The highlighted document is the one that is linked to. You can upload a new document/file, or if this list has more to offer, choose from the list

Choosing the "parent" determines where the document link will appear in the navigation as a sub-item

# Adding a New Page:

1. Add an entirely new top-level page by clicking Add Page at the top right corner.
2. To add a subpage to an already existing page, hover over the page you want to add a subpage to and click Add Page.

PAGES

FILE UPLOADS

ASSETS

RECYCLE BIN

URL REDIRECTS

Pages

Add Link    Add Document    Add Page

Below lists all of the pages that have been created for your site. You can add a new page/link/document, edit a page or completely remove it. Use the nav on the left to manage uploads, add assets/modules or undo a trashing.

PAGE NAME

Home Page

Products & Services    EDIT    × DELETE    + PAGE  DOC  LINK

Contact Us

Privacy Policy

Terms of Use

①

Add an entirely new top-level page here

②

Edit, Delete or Add a Page, Document or Link as a subpage

## Choosing a Template

Once you add a page, you will have to pick the template of the page.
Choose from left column, three column, right column, one column, split column and so on.
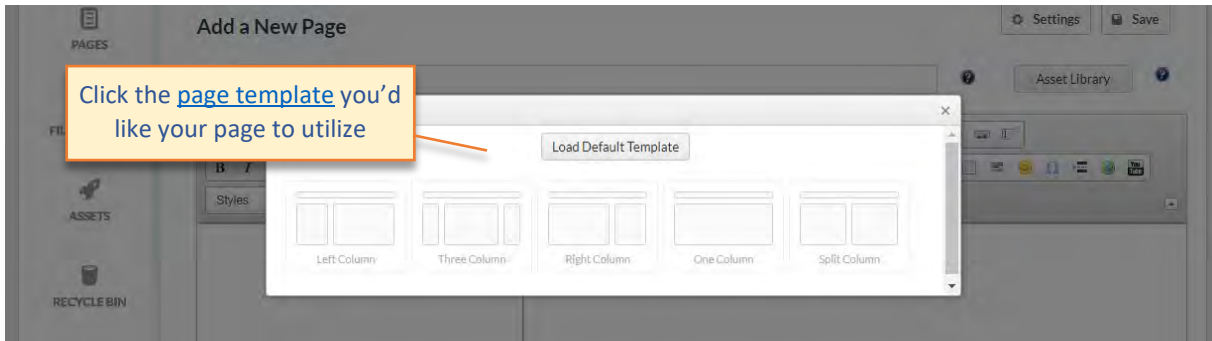
## Adding Text, Images, Links and More

After choosing your template, you will now be able to add text, images, links and more to your page as mentioned above.
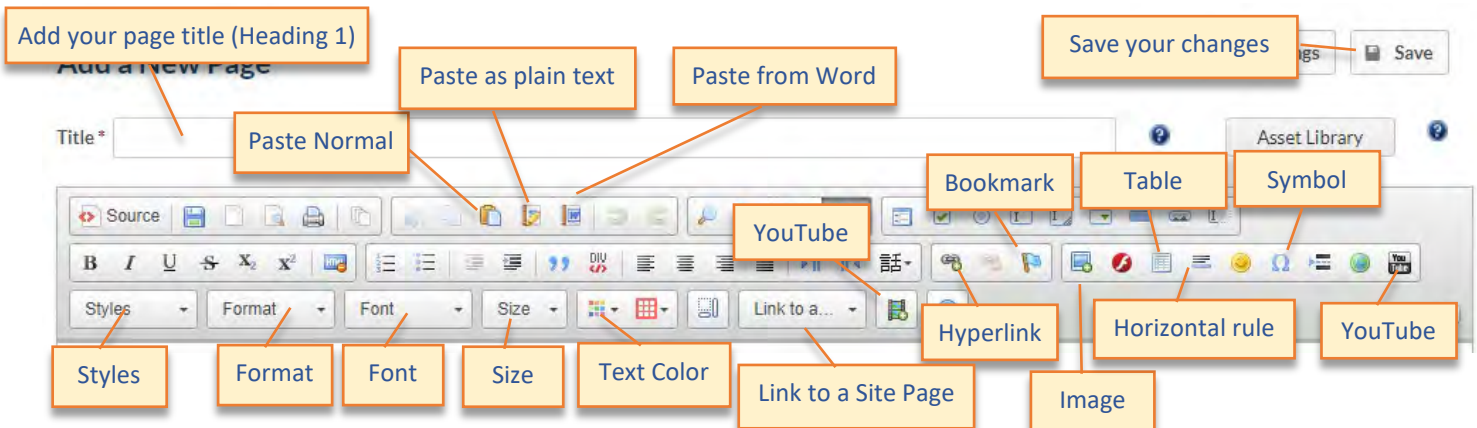
*Definitions/Explanations*

- ℹ️ **Page Title**: Proper page content structure starts with an appropriate H1 (heading 1). Which is why the H1 is required and why you should make sure your page title is relevant to the content within your page.

- ℹ️ **Paste Normal (Ctrl+V [Windows] or ⌘+V [Mac]):** Standard paste option, will often pull in exterior formatting if you copy from a website or Word Document. If you copy and paste from a website, you may notice that what you pasted may have some of its original formatting mixed in with your site's formatting.

- ℹ️ **Paste as Plain Text:** Pastes content but removes all formatting which allows you to then style the content based on the site styles or your own.

- ℹ️ **Paste from Word:** Allows you to paste content from Microsoft Word and maintain original content structure and formatting. It automatically detects Word content and transforms its structure and formatting to clean HTML.

- ℹ️ **Save (Your Cnothanges):** **NOTE:** You have to SAVE your page before you can PUBLISH it.

- ℹ️ **Styles:** Allows you to apply preset styles (implemented by your design team) to content within the editor.

- ℹ️ **Format**: Allows you to choose from predefined standard HTML styles. IE: Heading 1, Heading 2, Heading 3, Paragraph, etc.

- ℹ️ **Font:** Allows you to change your typeface from the font family applied by your design team to an alternate font. **IMPORTANT NOTE:** not all font families are available to all operating systems, devices, etc.

- ℹ️ **Font Size:** Allows you to adjust your font size from the predefined styles (implemented by your design team). **IMPORTANT NOTE:** font sizes appear differently across devices and can also be controlled by your site visitors based on their own web browser preferences.

- ℹ️ **Text Color:** If you want to change the color of sections of content, specific words, etc., highlight your content and then adjust to the color you prefer. **IMPORTANT NOTE:** Some colors do not display well with your design and may cause issues with legibility for some users especially those with visual impairments.

## Necessary Page Settings

You can also edit your new page settings by clicking Settings in the upper right corner.



## Adding a New Navigation Link

To add a new link to your site navigation, click Add Link at the top right corner of the page or hover over the page you wish to add the link to as a sub-page/link.

## New Link Details

Here, you will be able to pick what name the link will have in the Navigation, sub-text, the hyperlink, what window it will appear in, whether it's shown or not in the Navigation and its status. Be sure to save your changes.



# Adding a New Navigation Document

To add a document to your site navigation, click Add Document at the top right corner or hover over the page you wish to add the document to as a sub-page/link.

## New Document Details

Here, you will be able to pick what name it will have in the Navigation, sub-text, whether it's shown or not in the Navigation, the status, and where it will be in the Navigation. You will also pick from the documents already uploaded or choose Upload Document to upload a new file. Be sure to Save your changes.



To add a new document, click Upload Document. Then click Choose File and OK.

# File Uploads

File Uploads allows you to add documents, files and images for use within the PageBuilder – and in newer versions of our VPanel, it may include some of our modules as well. We do limit the types of files that can be uploaded – for instance: XLS (Microsoft Excel), DOC & DOCX (Microsoft Word Documents), JPG, PNG and GIF (popular image formats), PDF (Adobe Portable Document Format), TXT and ZIP files.

**IMPORTANT NOTE:** To ensure optimal page loading speeds, it's important that all file types loaded into the file uploads folders are cropped to designated size (these sizes should be listed in the titles of image subfolders) and are compressed to the smallest file size that still retains the desired quality. Here is a compression tool to help! (https://tinypng.com/)
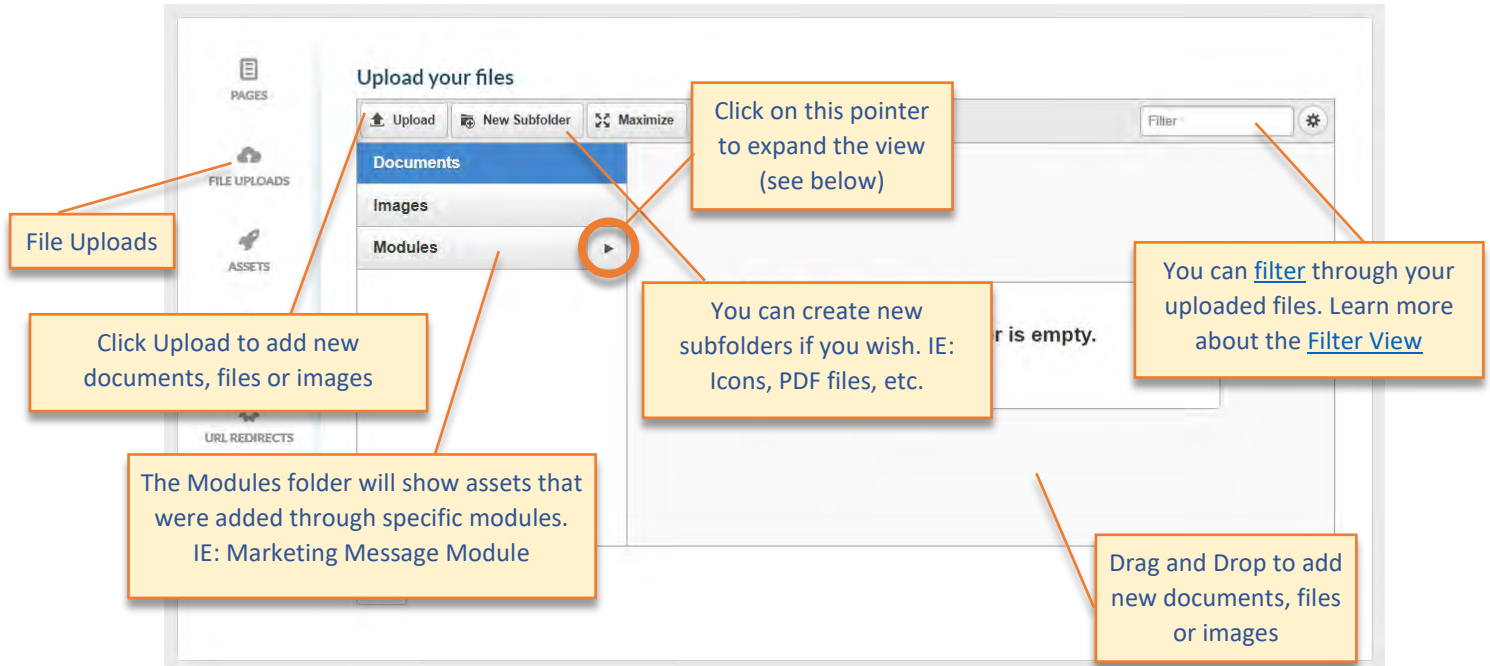


## File Uploads Expanded View
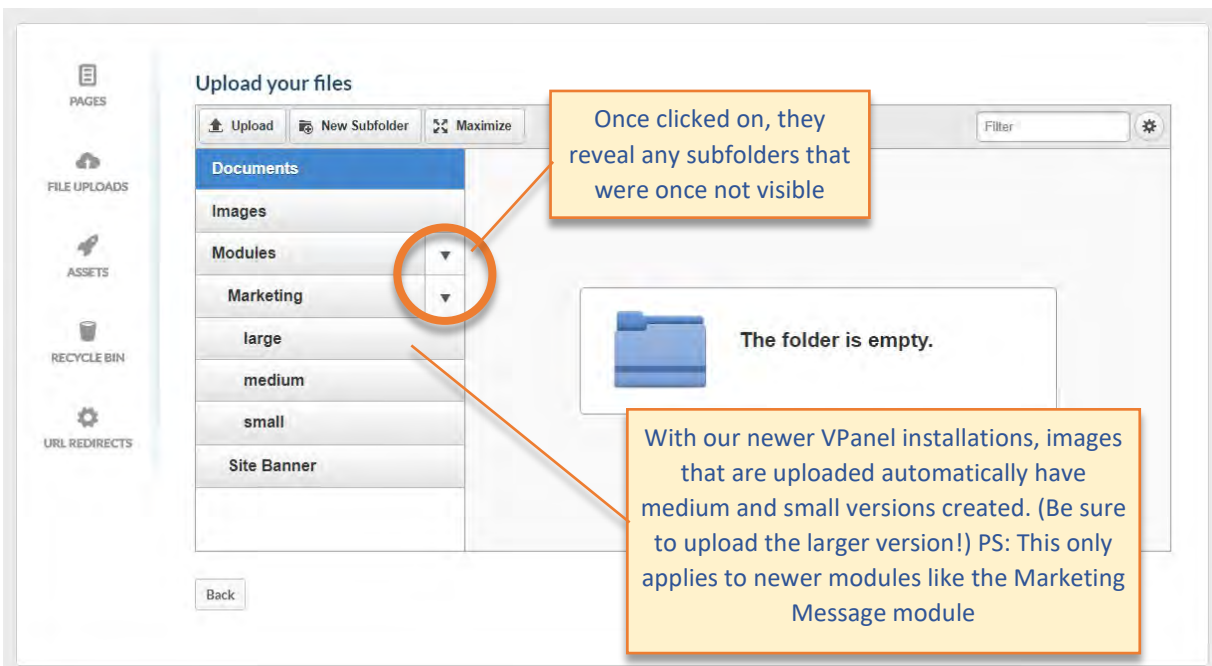
## File Upload Filter View

The Filtered view allows you to sort through your uploads (especially handy as your site begins to fill up with images, documents, etc.). As of right now, you can adjust various settings to impact/optimize your view: Settings (show file name, date, and/or size); view list or thumbnails; sort by file name, date or size; choose ascending or descending; and adjust the thumbnail size.
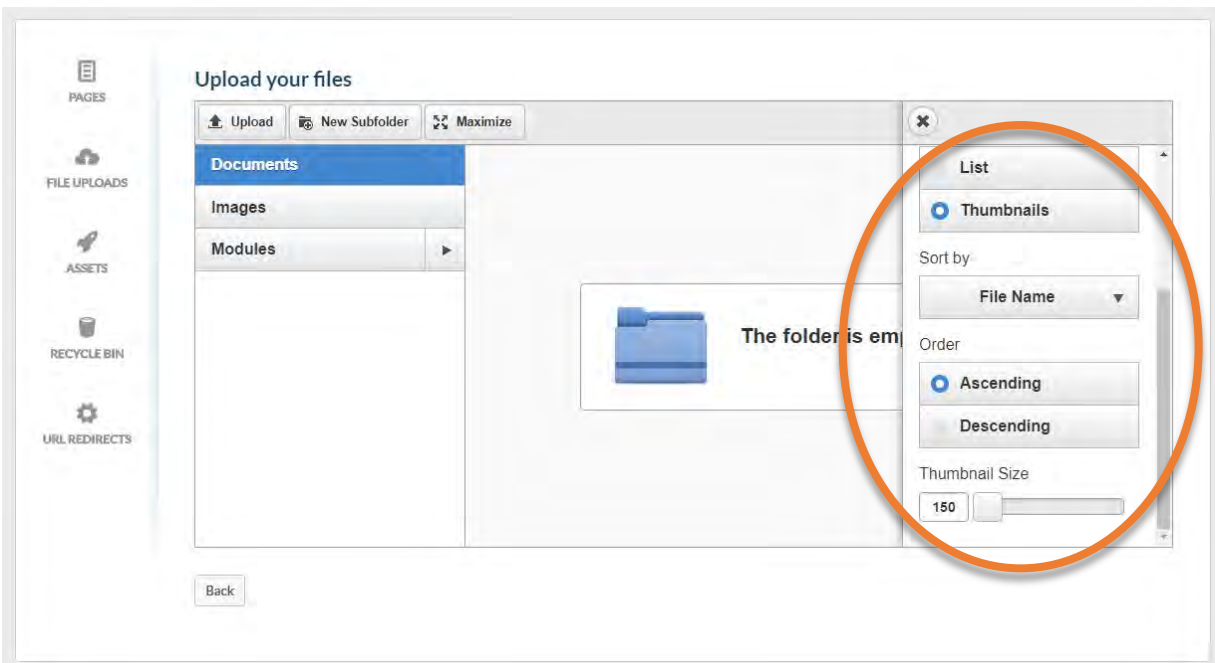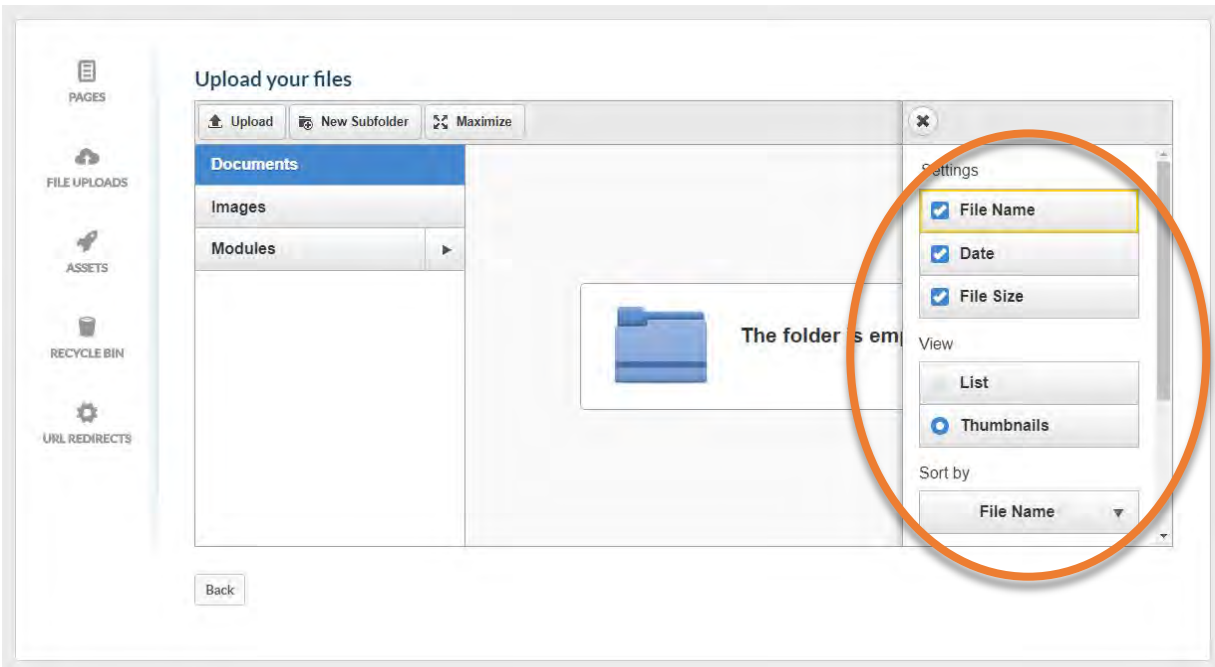
# Assets

An asset, as it relates to our VPanel, is a specific code that lets you insert dynamic and/or shared content within pages in your site. For example, your Asset Key could say **COMPANY-NAME**. Then each place that you see that asset key in your page will show the Company Name value in "live view." The advantage to Assets is that you have the ability to modify the asset in one place and then it updates anywhere the Asset Key is applied site-wide.



## Widget Assets

Widget Assets are exceptionally effective when it comes to adding elements to your site that contain custom content in one or more pages. A good example of this would be a cross-promotion element or promotional campaign. Keep in mind that this widget is placed within the site manually and has no expiration – to remove this asset would need to be done manually.

## Variable Assets

A Variable Asset is handy when it comes to linking to an external file or resource. Often times our team will utilize this type of Asset when it comes to our VPress Module that links to a file nested "behind the scenes" or a series of sub-navigation for a large section of content and sub-content – like the FAQ module.



# Recycle Bin

Content that is deleted from the site is **not permanently deleted**, but is instead transferred to the Recycle Bin – much like if you were to do so within Windows or "Send to Trash" on a Macintosh. From this screen, content can be permanently deleted from the system, or restored to its original location on your website.

# URL Redirects

URL Redirects simply redirect old URLs to your new, updated URL. They can also be utilized for marketing purposes. For instance – let's say you are running a promotional Print campaign with an ad in the local newspaper for "Fourth of July Savings on Mortgage Loans." The URL you use in your print ad could be www.yourdomain.com/july4thsavingsevent and it could redirect to www.yourdomain.com/mortgage-loans. Doing so has multiple benefits, including: 1) you are using a specific URL for people to remember and share with others, and 2) Google analytics will show how many people went to your specific print ad (or other type of ad) URL.

# POWERWEB 5.0 CATALOG

**Date Added Column:** View the date that an individual product was added to the catalog. Click "Date Added" to sort the products that were most recently or least recently added column to the catalog.

**Name Column:** View the name of the product that was added to the catalog. Click "Name" to sort the products in alphabetical or reverse alphabetical order.

**SKU Column:** View the SKU for each product that has been added to the catalog. Click "SKU" to sort the products by SKU number.

**Status Column:** You can use this field to see if the product is active or inactive within the online catalog. Click "Status" to sort column to show all active or inactive products.

**Images Button:** Click the images button to view all the images connected with a given product.

**Relations Button:** Click on the relations button to show how an individual product is connected to another product that is active in your catalog. You can select either "Related" or "Accessory" to show the connection if the products are connected at all.

**Edit Button:** Click the Edit Button to edit details related to an individual product

**Delete Button:** Click the Delete Button to delete the product from the online catalog.

| Date Added | Name | SKU | Status | Options |
|---|---|---|---|---|
| 03/29/2019 | ATTENDS ADVANCED UNDERWEAR LARGE APP0730 | | Active | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | ATTENDS ADVANCED UNDERWEAR MEDIUM APP-0720 | | Active | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | ATTENDS ADVANCED UNDERWEAR X-LARGE APP-0740 | | Active | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | ATTENDS BRIEF EXTRA ABSORBENT X-SMALL BRBX10 | | Active | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | ATTENDS UNDERWEAR SMALL APP-0710 | | Active | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 04/03/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | CUTIE DIAPERS SIZE 6 | | Active | IMAGES RELATIONS EDIT DELETE |
| 04/03/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | | | | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | DEPENDS UNDERWEAR MENS MAX LG 47926 | | Active | IMAGES RELATIONS EDIT DELETE |
| 03/29/2019 | DEPENDS UNDERWEAR WOMENS MAX LG 48124 | | Active | IMAGES RELATIONS EDIT DELETE |

CATEGORIES

MASTER CATALOG

MANUFACTURERS

1 2 3 ►  ►|  25 ▼ items per page 1 - 25 of 59 items

Back

Add New Product

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# Adding Products from Master Catalog

**Product Name Search:** Enter the name of the product you are searching for to narrow the results within the master catalog.

**Manufacturer Search:** Simply enter the name of a manufacturer you're searching for to view each product offered by that brand

**Category Search:** Filter the products listed in the Master Catalog by product category to view each product in a specific category.

PRODUCTS

CATEGORIES

MASTER CATALOG

MANUFACTURERS

Master Catalog

| Product Name | Manufacturer | Category | | Filter | Clear Filter |
|---|---|---|---|---|---|

| | | Prod | | Category | Manufacturer |
|---|---|---|---|---|---|
| ▶ | ☐ | 🖼 | Goo | CPAP | Puritan Bennett |
| ▶ | ☐ | 📄 | Asep | | |
| ▶ | ☐ | 📄 | Med | | |
| ▶ | ☐ | 📄 | N-95 | | |
| ▶ | ☐ | 📄 | Steth | | |
| ▶ | ☐ | 📄 | Tega | | |
| ▶ | ☐ | 📄 | Littn | | |
| ▶ | ☐ | 📄 | Micropore Surgical Tapes | Wound Care | 3M |
| ▶ | ☐ | 📄 | Steri-Strip Adhesive Skin Closures (reinforced) | Wound Care | 3M |
| ▲ | ☐ | 📄 | Tegaderm I.V. Transparent Dressing | Wound Care | 3M |

A sterile, waterproof, thin, transparent film dressing. Designed for I.V. applications, the dressing is notched and reinforced with soft cloth tape to provide a better seal and reduced edge lift around catheters and other devices.

| | | | | Diagnostics | 3M |
|---|---|---|---|---|---|
| ▶ | | | | Exam Gloves | 3M |
| ▶ | ☐ | 📄 | Littmann® Infant Bell SleeveClass | Stethoscope | 3M |
| ▶ | ☐ | 📄 | Blenderm Plastic Tape | Wound Care | 3M |
| ▶ | ☐ | 📄 | Buf-puf Back Scrub | Skin Care | 3M |
| ▶ | ☐ | 📄 | Buf-puf Body Sponge With Back Scrub | | |
| ▶ | ☐ | 📄 | Buf-puf Orig Reg Spng | | |
| ▶ | ☐ | 📄 | Buf-Puf Single Sponge Oil Free | | |
| ▶ | ☐ | 📄 | Buf-Puf Single With Facial Cleanser | | |
| ▶ | ☐ | 📄 | Casting Tape Soft | | |
| ▶ | ☐ | 📄 | Casting Tape White | Orthopedics | 3M |

| ⏮ ◀ 1 2 3 4 5 6 7 8 9 10 ... ▶ ⏭ | 25 ▼ items per page | 1 - 25 of 20238 items ↻ |
|---|---|---|

**Add Selected Products**

**Checkboxes:** Click this checkbox to select every product on the page to add those products to your site's online catalog.

**Checkbox (Individual product):** Click on the check box next to the individual product to add that specific product to your site's catalog.

**Filter:** Click the Filter Button to apply the search criteria in the Product Name, Manufacturer and Category Fields

**Clear Filter:** Restore the master catalog list and eliminate any filters you have applied

**Black Arrow:** Click this arrow to expand the product listing to view the product description and a thumbnail image for that specific product.

**Add Selected Products:** Once you have clicked the check boxes for the products you want to add to your catalog, this will finalize your catalog addition

# Manually Adding a Product to the Catalog

## Overview

**Date Added Column:** View the date that an individual product was added to the catalog. Click "Date Added" to sort the products that were most recently or least recently added column to the catalog.

**Name Column:** View the name of the product that was added to the catalog. Click "Name" to sort the products in alphabetical or reverse alphabetical order.

**SKU Column:** View the SKU for each product that has been added to the catalog. Click "SKU" to sort the products by SKU number.

**Status Column:** You can use this field to see if the product is active or inactive within the online catalog. Click "Status" to sort column to show all active or inactive products.

**Images Button:** Click the images button to view all the images connected with a given product.

**Relations Button:** Click on the relations button to show how an individual product is connected to another product that is active in your catalog. You can select either "Related" or "Accessory" to show the connection if the products are connected at all.

**Edit Button:** Click the Edit Button to edit details related to an individual product

**Delete Button:** Click the Delete Button to delete the product from the online catalog.

**Add New Product:** Click this button to add a new product to the catalog.

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## Add/Edit a Product

### Details Tab

**Product Name:** Enter the product name. What you enter here is the same name the users will see on the front end of the site in your online catalog.

**Primary Category:** Choose the main category that the new product will be affiliated with within the online catalog.

**Current Categories:** View all the categories currently added to your catalog. You can click the radio button next to each product to assign the new product to that specific category.

**Main Description:** Use this space to fill out the complete description for this product. Writing a unique description focusing on the benefits and features of the product will bring a stronger search result than using a description provided by the manufacturer.

**Short Description:** Describe the product in a max of 250 characters. This description will appear in the main catalog view before the users clicks on the product to get the full details.

**SKU:** Enter the SKU code for the new product.

**Manufacturer:** Choose the manufacturer from the drop-down list. If this is the first product from a manufacturer, click on "New Manufacturer" and enter the manufacturer's name in the field that appears.

**HCPCS:** Enter the HCPCS code for the new product.

**GL Code:** Enter the GL code for the new product.

**Weight:** Enter the weight of everything included with the new product in pounds.

CATEGORIES

MASTER CATALOG

MANUFACTURERS

DETAILS    SPECIFICATIONS    SEO

...formation (Add)

...ed (*) fields below for this product.

Please fill out the following fields below.

Product Name *

Primary Category *    CPAP

**Categories**

— To add a new category, simply search the category nam...
— To remove a category, simply click the x next to the cat...

Current Categories

Search Product Categories    Show All Categories

Source    Styles    Format    Size

B  I

Main Description *

Short Description    250 Characters Remain...

Manufacturer    -- Unknown Manufa...

SKU

HCPCS Code

GL Code

**Weight**

Item Weight (lbs)    0.0000

Duplicate Product    Save Changes

Next Section

## Specifications Tab

**Add New Specification Button:** Opens the tab to add a new specification to the product.

**Specification Title:** Enter the title for the new specifications.

**Name dropdown:** Choose from a pre-populated list of specifications.

**Value:** Add the value of the specification.

**New Button:** If the specification you want to add is not in the drop down, click the "New" button and enter the specification. The new specification will be added to the drop down and can be used for new products moving forward.

**Add additional spec button:** Add another specification to the list for the new product.

## Features Tab

**Add New Feature Button:** Click this button to open a tab to add a new product feature. You will click this button each time you want to add a feature for a specific product.

**Feature Field:** Enter the feature of the product.

## Includes Tab

**Product Information (Add)**

Fill out all of the required (*) fields below for this product.

Duplicate Product | Save Changes

DETAILS | SPECIFICATIONS | FEATURES | **INCLUDES** | DOCS & VIDEOS | SETTINGS | SEO

> Enter what is included in the packaging for the product, including power adapters, tubing, user manuals, etc.

← Previous Section | Next Section →

## Docs & Videos Tab

**Product Information (Add)**

**Link New Document Button:** Enter a link to a digital document that can be used for this product.

**Upload New Documents Button:** Manually load a new document that has been saved on your computer. Word documents or PDF files are acceptable.

FEATURES | INCLUDES | DOCS & VIDEOS | SETTINGS | SEO

**Search Product Document:** Perform a keyword search for the of the documents currently available.

**Product Documents**

Link New Document | Upload New Document | Selected Documents

– To add a new document, simply search the document name and check the document that you would like to add.
If you do not find the document you want click the "Upload Document" button to upload document from your computer.

– To remove a document, simply click the x next to the document you would like to remove.

**Show All Documents Button:** Show all the documents that have been added. To add a document from the list, just click the radio button next to the document.

Search Product Document | Show All Documents

**Product Videos**

**YouTube Button:** Open the window to add details to add YouTube videos associated with this product.

**Embed Youtube Video** ✕

Paste Embed Code Here

or

Paste Youtube Video URL | Width 640 | Height 360

☑ Show suggested videos at the video's end   ☐ Use old embed code
☐ Enable privacy-enhanced mode                ☐ Autoplay
Start at (ss or mm:ss or hh:mm:ss)

OK | Cancel

## Settings Tab

**Require Rx:** Specify if the product requires a prescription to purchase.

**In Stock:** Specify if the product is in stock and available for customers.

**Featured:** Clicking "Yes" will place the product in the featured product feed, wherever it appears on the website.

**New:** Clicking "Yes" will place this product in the New Product feed, where that feed appears on the website.

**Status:** Specify whether the product is active or inactive. If the product is marked "Active" it can be viewed by website users within the online catalog.

## SEO Tab

**Meta Title:** Enter the title of the product using some of the meta keywords. This will be crawled by search engines and will go toward indexing the site for SEO purposes. **Do not include the company name in the title.**

**Meta Keywords:** Enter the keywords for the product that will be crawled by search engines to determine SEO rankings.

**Meta Description:** Write a complete sentence about the product while including some of the meta keywords. You may include the company name in the meta description of the product.

**Keyword Search:** Enter the keywords that will allow users to search for the product within your website.

**Permalink:** Enter a URL to directly link the product. Separate words with the dash symbol (-). This link can be used when linking directly to the product in online marketing or social media marketing.

# Catalog Categories

## Overview

**Name:** View the name of each product category currently available within the online catalog. Click on "Name" to organize the products in alphabetical or reverse alphabetical order.

**In Nav:** This column shows if the specific product category is viewable in the main navigation on the front end of the website.

**Status:** This column shows if the product category is active or inactive. All active categories are accessible to users of the website. Click on "Status" to organize the categories as active and inactive.

**Sub Categories Button:** View all the sub categories associated with an individual product category.

**Products Button:** View all products housed within an individual product category.

**Images Button:** View the image that has been assigned to an individual product category.

**Edit Button:** Edit information for this product category. Including category, description and SEO settings.

**Delete Button:** Delete the category from the online catalog. If there are products or sub-categories within the category, all of them need to be deleted or assigned to a new category before confirming the delete. **If products and sub-categories aren't re-assigned, the category cannot be deleted.**

There are currently 9 categories.

| Name | In Nav | Status | | | | | |
|------|--------|--------|---|---|---|---|---|
| Durable Medical Equipment | No | Active | SUB CATEGORIES (0) | PRODUCTS (4) | IMAGES | EDIT | DELETE |
| Incontinence | Ye | | (0) | PRODUCTS (34) | IMAGES | EDIT | DELETE |
| Wound Care | N | | (0) | PRODUCTS (0) | IMAGES | EDIT | DELETE |
| CPAP | N | | (0) | PRODUCTS (0) | IMAGES | EDIT | DELETE |
| Stethoscope | N | | (0) | PRODUCTS (0) | IMAGES | EDIT | DELETE |
| Medical Alert Systems | | | | PRODUCTS (1) | IMAGES | EDIT | DELETE |
| Nutritional Supplements | | | | PRODUCTS (5) | IMAGES | EDIT | DELETE |
| Nutritionals | | | | PRODUCTS (13) | IMAGES | EDIT | DELETE |
| Patient Lift | | | | PRODUCTS (2) | IMAGES | EDIT | DELETE |

1 - 9 of 9 items

## Adding/Editing Categories

Categories (Add)

...egory record information below and click the save button when you are finished.

...ory Information

**Name:** Enter the name of the category.

Name *
40 Characters Remaining

PRODUCTS

MASTER CATALOG

MANUFACTURERS

Description

**Description:** Use this space to fill out the complete description for the category.

**Short Description:** Describe the category in a max of 250 characters. This description will appear in the main catalog view before the users clicks on the category to get the full details.

NOTE: This text will show up at t...

Short Description
250 Characters Remaining

**Show in Nav:** Click "Yes" to have the category show in the website's main navigation menu.

Show In Nav *          Yes    No  (Limit of 5 Categories in Nav)

Status *          Active    Inactive

**Status:** Click Active to verify that the category is live on the front end of the website.

**Meta Title:**  Enter the title of the category using some of the meta keywords. This will be crawled by search engines and will go toward indexing the site for SEO purposes. **Do not include the company name in the title.**

EO Settings

Meta Title
43 Characters Remaining

**Meta Keywords:** Enter the keywords for the category that will be crawled by search engines to determine SEO rankings.

Meta Keywords
155 Characters Remaining

Meta Description
155 Characters Remaining

**Permalink:** Enter a URL to directly link the category. Separate words with the dash symbol (-). This link can be used when linking directly to the category in online marketing or social media marketing.

Permalink
80 Characters Remaining

**Meta Description:** Write a complete sentence about the category while including some of the meta keywords. You may include the company name in the meta description of the product.

## Sub-Categories

### Overview

**Name:** View the name of each product sub-category. Click on "Name" to organize the sub-categories in alphabetical or reverse alphabetical order.

**In Nav:** This column shows if the specific product sub-category is viewable in the main navigation on the front end of the website.

**Status:** This column shows if the product sub-category is active or inactive. All active categories are accessible to users of the website. Click on "Status" to organize the sub-categories as active and inactive.

**Add New Sub-Category Button:** Click this button to open the page to add a new sub-category to the category.

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## Add/Edit Sub-Category Information

**Online Catalog**    Add / Edit / Remove a Product Category

PRODUCTS

**Patient Lift Categories   (Add)**

...egory record information below and click the save button when you are finished.

**Name:** Enter the name of the sub-category.

...ory Information

MASTER CATALOG

Parent Category    Patient Lift

Name *

40 Characters Remaining

MANUFACTURERS

Source | Styles | Format | Size

B  I  U  S  X₂  X²

**Description:** Use this space to fill out the complete description for the sub-category.

Description

**Short Description:** Describe the sub-category in a max of 250 characters. This description will appear in the main catalog view before the users clicks on the sub-category to get the full details.

NOTE: This text will show up at the top of this category's list page

Short Description

**Show in Nav:** Click "Yes" to have the sub-category show in the website's main navigation menu.

250 Characters Remaining

Show In Nav *    ◯ Yes  ◉ No  (Limit of 5 Categories in Nav)

Status *    ◉ Active  ◯ Inactive

**Meta Title:** Enter the title of the sub-category using some of the meta keywords. This will be crawled by search engines and will go toward indexing the site for SEO purposes. **Do not include the company name in the title.**

**Status:** Click Active to verify that the sub-category is live on the front end of the website.

EO Settings

Meta Title

43 Characters Remaining

**Meta Keywords:** Enter the keywords for the sub-category that will be crawled by search engines to determine SEO rankings.

Meta Keywords

155 Characters Remaining

Meta Description

155 Characters Remaining

**Permalink:** Enter a URL to directly link the sub-category. Separate words with the dash symbol (-). This link can be used when linking directly to the sub-category in online marketing or social media marketing.

Permalink

80 Characters Remaining

ack

**Meta Description:** Write a complete sentence about the sub-category while including some of the meta keywords. You may include the company name in the meta description of the product.

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## Related Products Section



**Product Relations**   Add / Edit / Remove a Product Relation

**ID:** Unique product ID for each product. Click on this header to sort alphabetically or reverse-alphabetically.

**Product:** This column shows all products available. Click on this header to sort alphabetically or reverse-alphabetically.

**SKU:** Click on this header to sort alphabetically or reverse-alphabetically.

**Related Checkbox:** Check this box to make this a related product.

**Accessory Checkbox:** Check this box to display this as an accessory in the products accessories tab on the front end of the website.

CATEGORIES

MASTER CATALOG

MANUFACTURERS

Search Grid     Clear

| ID | Product | SKU | Related | Accessory |
|----|---------|-----|---------|-----------|
| 536 | ATTENDS ADVANCED UNDERWEAR LARGE APP0730 | | | |
| 537 | ATTENDS ADVANCED UNDERWEAR MEDIUM APP- | | | |
| 538 | ATTENDS ADVANCED UNDERWEAR X-LARGE APP- | | | |
| 539 | ATTENDS BRIEF EXTRA ABSORBENT X-SMALL BRBX | | | |
| 541 | ATTENDS CLASSIC BRIEF LARGE BRB30 | | | |
| 540 | ATTENDS CLASSIC BRIEF MEDIUM BRB20 | | | |
| 542 | ATTENDS CLASSIC BRIEF X-LARGE BRB40 | | | |
| 544 | ATTENDS UNDERWEAR SMALL APP-0710 | | | |
| 545 | BLADDER CONTROL PAD 11IN PREVAIL PV-916/1 | | | |
| 546 | BOOST CHOCOLATE 8 OZ TETRA BRIKS 67538 | | | |
| 551 | BOOST VHC VANILLA 8 OZ TETRA BRIKS 18216 | | | |
| 552 | BRIEF DEPEND MAX PROTECT S/M 35456 | | | |
| 556 | BRIEF FQP IB MEDIUM IB-012 | | | |
| 543 | BRIEF PREVAIL XX-LARGE BREATHABLE PV-017 | | | |
| 559 | BRIEF WINGS QUILTED MEDIUM WAIST 66033 | | | |
| 560 | BRIEF WINGS QUILTED X-LARGE WAIST 66035 | | | |
| 576 | Ceiling Lift | | | |
| 562 | CUTIE DIAPERS SIZE 4 | | | |
| 563 | CUTIE DIAPERS SIZE 5 | | | |
| 561 | CUTIE DIAPERS SIZE 6 | | | |
| 578 | Deluxe Aluminum Shower Chair | | | |
| 564 | DEPENDS FIT-FLEX MALE SM/MED 43616 | | | |
| 566 | DEPENDS UNDERGARMENT ADJ. LG/XL 49175 | | | |
| 567 | DEPENDS UNDERWEAR MENS MAX LG 47926 | | | |
| 568 | DEPENDS UNDERWEAR WOMENS MAX LG 48124 | | | |

1  2  3    25 ▾ items per page     1 - 25 of 58 items

Back

## Category Images

### Add an Image



**Image Title:** Add a title for this image.

**Description:** Write a description of the image.

**Alt Text:** Write text explaining what the image shows. This is very important for SEO and Accessibility.

**Choose File Button:** Choose an image file from your computer to add to this category. Acceptable file formats are .gif, .jpg, .jpeg and .png.

### Editing an Image



**Delete Image:** Removes the current image and allows you to upload a new image (and thumbnail).

**Delete Thumbnail:** Removes the current thumbnail and allows you to create a new one.

## Manufacturers

### Overview



**Name:** View the name of each manufacturer with products within the online catalog. Click on "Name" to organize the products in alphabetical or reverse alphabetical order.

**Status Column:** You can use this field to see if the manufacturer t is active or inactive within the online catalog. Click "Status" to sort column to show all active or inactive manufacturers.

**Date Added Column:** View the date that an individual manufacturer was added to the catalog. Click "Date Added" to sort the manufacturer that were most recently or least recently added column to the catalog.

**Website:** In this column, you can view the URL for the manufacturer, if it has been added in the manufacturer's entry.

**Modify Button:** Click this button to modify and edit information for a specific manufacturer.

**Logo:** Click "View Image" to view the logo file for the manufacturer. This will not display if the logo has not been added in the manufacturer's entry.

**Delete Button:** Click this button to delete the manufacturer entry from the catalog.

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## Add/Edit Manufacturer

**Name:** Enter the name of the manufacturer.

**Logo:** Click "Choose File" to upload the logo file for the manufacturer. Accepted file formats are .gif, .jpg, .jpeg and .png

**Website:** Enter the website for the manufacturer to be linked within the manufacturer entry.

**Description:** Enter a description for the manufacturer in no more than 250 characters. These will be displayed on the catalog entry before the user clicks into the manufacturer to view all their products within the catalog.

**Status:** Select active to ensure the manufacturer is live and displays on the front end of the website.

**Meta Title:** Enter the title of the manufacturer using some of the meta keywords. This will be crawled by search engines and will go toward indexing the site for SEO purposes.

**Meta Keywords:** Enter the keywords for the manufacturer that will be crawled by search engines to determine SEO rankings.

**Meta Description:** Write a complete sentence about the manufacturer while including some of the meta keywords.

**Permalink:** Enter a URL to directly link the manufacturer. Separate words with the dash symbol (-). This link can be used when linking directly to the category in online marketing or social media marketing.

# FORMS

There are a number of forms available, but the primary forms that come with our standard base install are the Contact Form and the Quick Form. In most cases, the form functions are relatively the same. Start by clicking the "Manage" button.

NOTE:  *Due to HIPAA and Security Protocols/Policies, we do not send form submission data over e-mail. Instead, our system sends you an e-mail notification that a form has been submitted – and includes a link to log in to the VPanel where you can then view the form submissions within a secure environment.*



## Form Settings

After clicking "Manage" the screen will change to show your form submissions. You'll notice you can adjust the date range **(1)**, search the submissions **(2),** which is handy when there are multiple pages worth of submissions, filter by unread/archived/all **(3)**, view or archive the form submissions **(4)**, export the data **(5)** or update the "Form Settings"**(6)**

# Filtering Form Submissions

Filtering your form submissions **(1)** allows you to narrow down what is displayed in your active grid view. Once you read a form submission and act upon it, it will often be considered "Archived". Viewing by "Unread" will naturally show you the submissions that have not been read. View "All" displays both Read and Archived form submissions.

Imagine if there are two or more users with the ability to log in and view form submissions – one of these users reads the submission and interacts which then turns that submission status to "Archived". If you are also responsible for viewing the form submission but can't seem to locate the submission, you can switch your filter to view All.

You can also Archive a form submission at any time by clicking on the "Archive" button **(2)**.



# Viewing Individual Submissions

Viewing the individual submission shows you all the data that was provided and/or collected by the submission. Notice you can add comments to this submission **(2)** – sort of like a mini "CRM" – but you must hit Save Comments **(3)** after typing or the data will not save. Utilizing this function is handy when you are working with one or more other users to help communicate that you have responded to this customer. You can also reply to the client **(1)** from this form submission view, follow link to (learn more about replying to the customer).

# Replying to a Customer

Replying to a customer via the VPanel is a link that actually initiates your "Mail Client" and allows you to type your message in a familiar setting. By default, the link will grab the e-mail address that was provided in the form submission. One of the many advantages of initiating your Mail Client is that you can add to the recipients in the TO, CC (Carbon Copy) or even the BCC (Blind Carbon Copy) field.
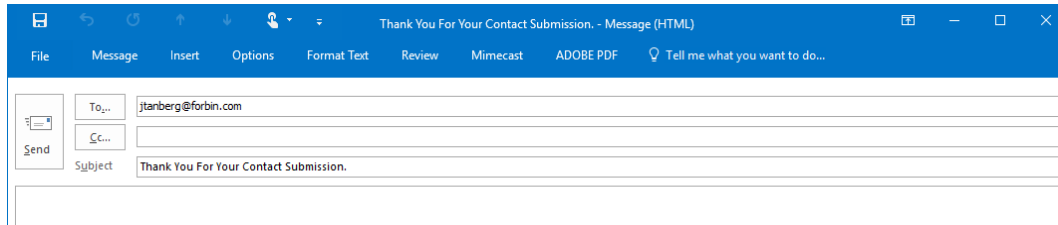


# Exporting Form Data

When you click on the "Export Data" option, it initiates a download screen and allows you to apply the filename you prefer, as well as where you wish to save the file. Notice also that the default file format is a Microsoft Excel Worksheet.
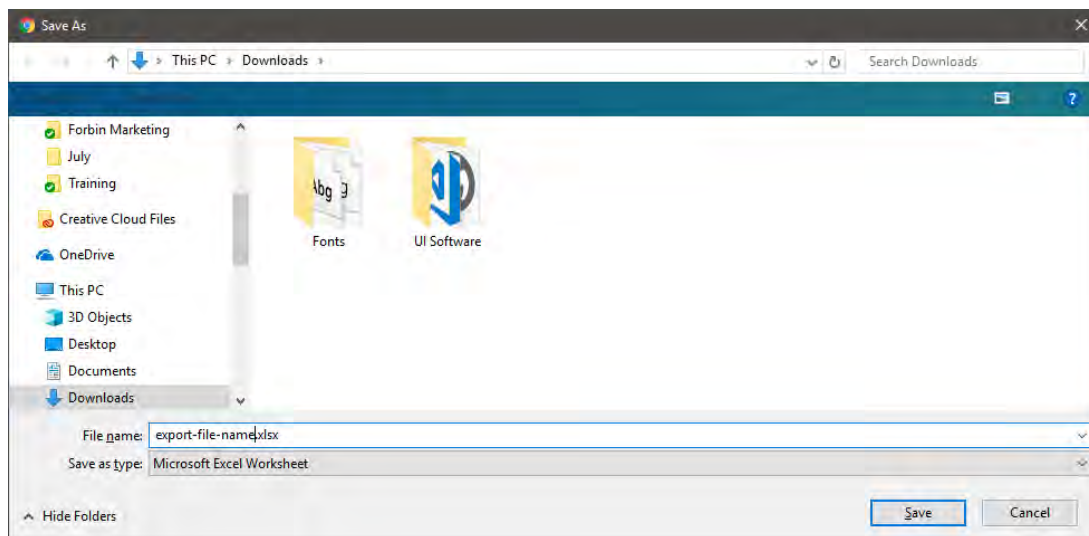


# Adjusting Form Settings

You can add multiple recipients or just have one **(1)** – in some cases, clients have used a "catch all" e-mail like info@theirdomain.com. You also have the ability to change the confirmation message **(2)** that displays (typically right above the form) after the user submits their form.
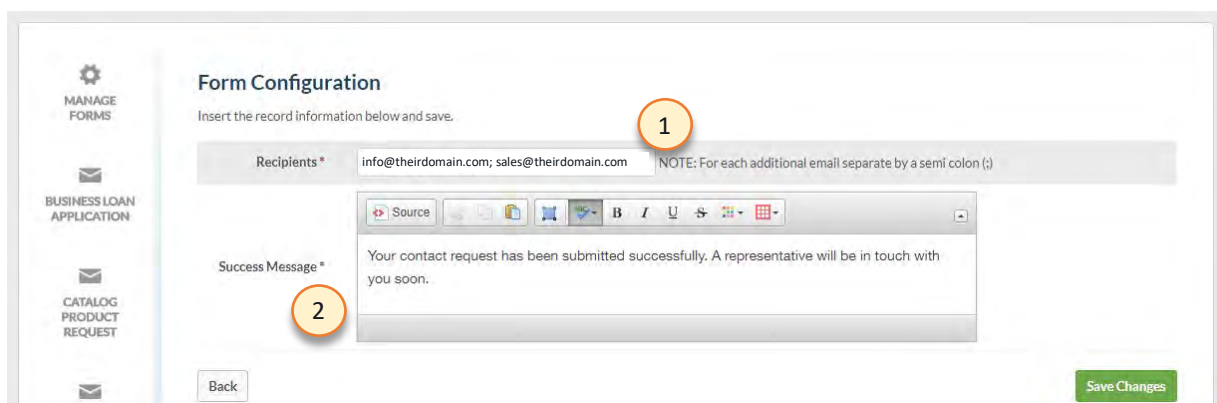
# USERS

Users within our VPanel can have different levels of security and/or clearance that unlock (or lock) various features of the VPanel. User activity is also logged within our system for security, audits and "rollback" purposes. Adding a new user **(1)** or managing a current user **(2)** are simple actions to complete within the VPanel. The overview screen shows several options – username, real/administrator name, e-mail address, current status, last login date, etc. We explore these options in the pages that follow.

## Manage Users
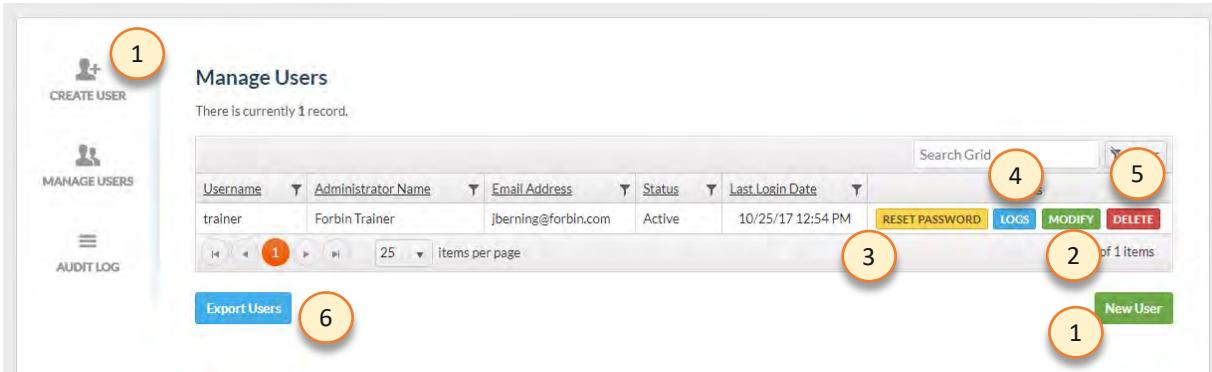


1. **Create a New User** – Start from scratch
2. **Modify a Current User** – Edit various elements of a current user: change their last name, e-mail, permissions, etc. (utilizes the same screen as the New User screen)
3. **Reset Password** – If you are logged in and another user needs their password reset, you can click this to initiate the process
4. **Logs** – Lets you view a log a history of the site activity for a particular user
5. **Delete** – Delete a current user. This cannot be undone, but a new user can be created naturally. We, however, recommend utilizing the "active or inactive" state within the Modify User screen
6. **Export Users** – Initiates a download screen that allows you to export User Data in a CSV (Comma Separated Value) format

# Create a New User



- ⓘ **Master Admin** – If Yes, then they have full permissions available to a user. If no, then their permissions are managed in the Roles/Permissions area

- ⓘ **Name** – Should ideally be the user's legal name (first name, last name)

- ⓘ **E-Mail** – Must be a valid e-mail address. The new user's temporary login credentials are sent via this e-mail address

- ⓘ **Username** – Usernames should be unique to user. There are no specific requirements set forth by our VPanel platform

- ⓘ **Roles / Permissions** – These roles provide a variety of opportunities depending on how your team is needed to interact with your site

    - ○ **User Manager:** Grants user permission to create and edit VPanel users and set their permissions.

    - ○ **Audit Log Manager:** Grants user access to view Event Audit Log

    - ○ **Content Author:** Grants user general access to VPanel's PageBuilder.
      **NOTE:** A user with this role cannot publish content changes from PageBuilder unless they also have the Content Publisher role enabled.

    - ○ **Content Publisher:** Grants user publishing access to VPanel including PageBuilder, site configuration, and site modules.

    - ○ **Form Viewer:** Grants user access to view form submissions on the site.

- ⓘ **Status** – *Active* = can log in and interact, *Inactive* = cannot login at all, *Locked* = This user account cannot be recreated with the specific credentials

# Audit Log

This tool allows administrators and owners to identify security issues before they become a security problem. It tracks username, full name, the event logged (password change, login, modifications to members, pages, etc.), the date and time of the event and the status.



Export Audit Log Data

## Export Audit Log Data

Created to allow you to export your Audit Log data. Exports only to CSV (Comma Separate Value) format.
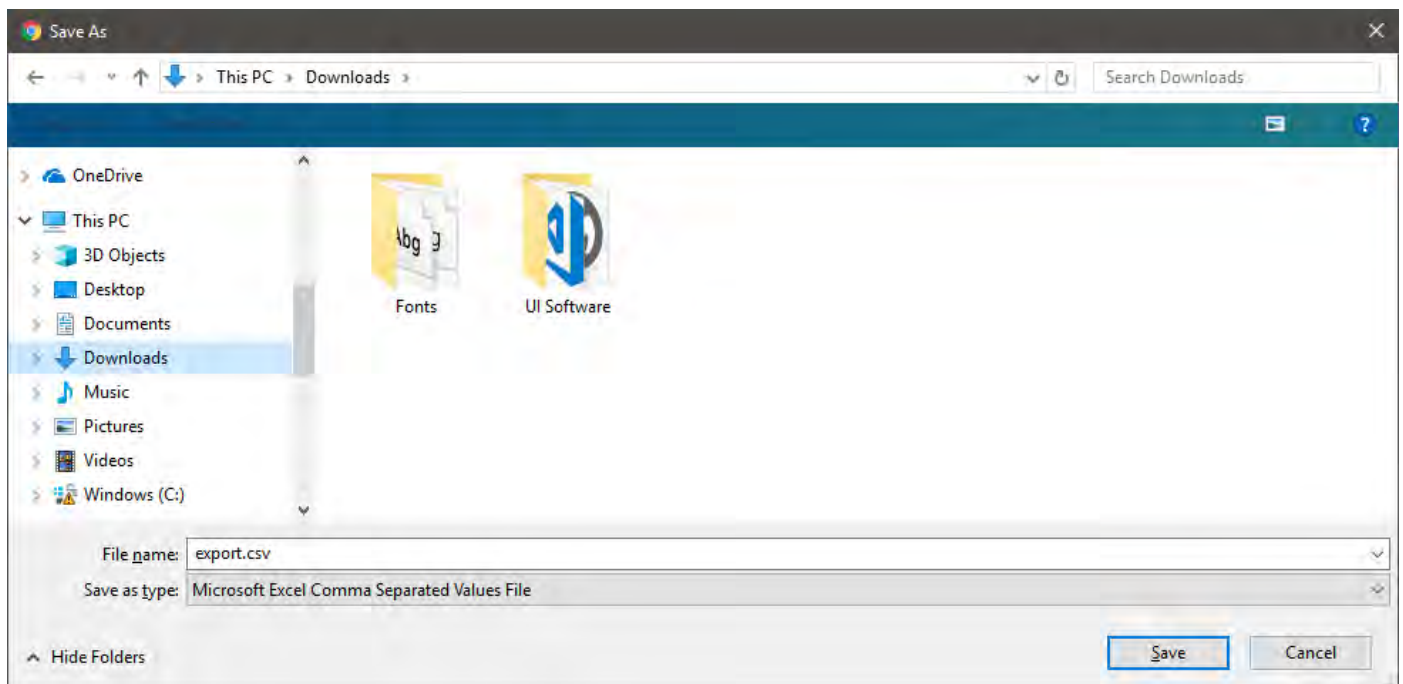
# LOCATIONS

There are currently no limits on how many locations you can add to your site. The first location within your list is what is displayed by default on the visitor-facing side of your site. If you would like to rearrange the order of your locations, you can do so by clicking on the "Reorder" button **(1)**. You can modify a current listing or a listing added by a VGM Forbin team member **(2)**. If you would like to associate an image with your location, click on the "Image" button **(3)**.

## Add a Location

# Add a Location Image



Adding an image to your location listing is like putting a face to a name. For best results, we recommend hiring a professional photographer – but if you take your photo on a partially-cloudy to mostly-cloudy day, you could also have some great results.

If you wish to change your image, simply click on "Choose File" to search on your computer/network for the new image

# Reordering Location Listings

The reorder function is drag-and-drop and instant. Simply roll your mouse over the location you want to move until the cursor changes, then click (and hold) your mouse, then drag the location to the new order/position you would like it to appear.

**NOTE:**
**OUR REORDER FUNCTION IS INSTANT!**
As soon as you let go of your mouse and drop the location into the desired order/position, the location is updated –
and the listing on the visitor-view of your site is instantly updated as well.

# GLOSSARY

| | |
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| Anchor Links | You can use anchor links to help your readers navigate to a specific section of your content without having to scroll. First you'll insert an anchor in the section you want to link to, then you can add a link that takes visitors directly to this anchor. |
| Audit Log | The VPanel Audit Log retains various actions by various users within your site from the moment the site was installed until the current date and time. |
| BCC (Blind Carbon Copy) | When you send an e-mail to only one person, you type the recipient's address in the "To:" field. When you send a message to more than one person, you have the option to enter addresses in the "Cc:" and "Bcc:" fields. "Cc" stands for "Carbon Copy," while "Bcc" stands for "Blind Carbon Copy." |

A carbon copy, or "Cc'd" message is an e-mail that is copied to one or more recipients. Both the main recipient (whose address is in the "To:" field) and the Cc'd recipients can see all the addresses the message was sent to. When a message is blind carbon copied, neither the main recipient nor the Bcc'd recipients can see the addresses in the "Bcc:" field.

Blind carbon copying is a useful way to let others see an e-mail you sent without the main recipient knowing. It is faster than sending the original message and then forwarding the sent message to the other recipients. It is also good netiquette to use Bcc when copying a message to many people. This prevents the e-mail addresses from being captured by someone in the list who might use them for spamming purposes.
SOURCE: TECHTERMS

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| Breadcrumb | Breadcrumbs are a user interface element designed to make navigation easy and intuitive. They are used by operating systems, software programs, and websites. Breadcrumbs display the directory path of the current folder or webpage and provide one-click access to each of the parent directories. Like breadcrumbs in the story "Hansel and Gretel," they allow you to retrace your steps back to where you started. |

The Windows operating system displays breadcrumbs in the toolbar of each open window. If you open the "Public" user folder, for example, the toolbar will display the current location as:

Computer → Local Disk (C:) → Users → Public

This provides a simple way to view the directory path of the current folder. Each of directories listed in the toolbar are clickable, providing quick access to the parent folders.

Webpages often include breadcrumbs near the top of the page, though they are usually placed outside of the main navigation bar. The purpose of website breadcrumbs is twofold: 1) to clearly identify what section of a website a specific webpage is located, and 2) to make it easy for you to jump to the parent sections. For example, a soccer page on a news website may include breadcrumbs near the top of the page. This indicates the current page is three sections deep within the website. Since each section name is also a link, you can quickly jump to any of the parent sections by simply clicking the link within the breadcrumbs.
SOURCE: TECHTERMS

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| CC (Carbon Copy) | The term comes from carbon copying, in which a piece of carbon paper copies writing from one paper to another (often used when filling out forms). However, the term is now commonly used in reference to e-mail. When you send an e-mail message, you typically type the recipient's address in the "To:" field. If you want to send the message to one or more other recipients, you can use the "Cc:" field to add additional addresses. This will send the e-mail to the address in the "To:" field and to each address listed in the "Cc:" field as well. |

The "Cc:" option is often used in business communications when a message is intended for one person, but is relevant to other people as well. For example, a retail employee may e-mail another employee saying he can

work for her on a certain day. He might include his manager's and assistant manager's e-mail addresses in the "Cc:" field to let them know he is taking the work shift. Similarly, a team member working on a product design may e-mail his boss with the latest design revisions and may "Cc:" the other members of his team to let them know the e-mail has been sent.
SOURCE: TECHTERMS

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| CRM | C-R-M stands for Customer Relationship Management. What is CRM? At its simplest definition, a CRM system allows businesses to manage business relationships and the data and information associated with them.<br>SOURCE: SALESFORCE.COM |
| Data Values | Data values are what actually take place in the data variable set aside by the data entities and all its attributes.  It consists of facts and figures of data items, data attributes and data characteristics.<br>SOURCE: GEEKINTERVIEW |
| Direct URL | A direct URL is an easy to read URL that users can enter to get to a specific item, document, page, category, or perspective. Often times referred to as a "Vanity URL" – and is often utilized in marketing practices |
| Drag-and-Drop | A common action performed within a graphical user interface. It involves moving the cursor over an object, selecting it, and moving it to a new location.<br><br>If you are using a mouse, you can drag and drop an object by clicking the mouse button to select an object, then moving the mouse while keeping the mouse button pushed down. This is called "dragging" the object. Once you have moved the object where you want to place it, you can lift up the mouse button to "drop" the object in the new location. If you are using a touchscreen device, you can select an item by simply touching it with your finger. (Some interfaces may require you to hold your finger on the object for a second or two to select it.) Then you drag the item by moving your finger across the screen to the location where you want to place it. To drop the object, simply lift your finger off the screen.<br>SOURCE: TECHTERMS |
| Font | The Specific Tool (or File) That Contains a Typeface. In the original, movable type publishing sense, a "font" was a collection of metal casts that contained letters and symbols in specific sizes—all based on the design of the typeface. To be even more precise, a specific font was a collection of glyphs in a specific size and weight (bold, italic, etc). So, the metal casts for "Times New Roman, size 12, regular" would be a different font than "Times New Roman, size 20, bold," and the typesetter would select them as needed for specific parts of a page.<br>SOURCE: HOWTOGEEK |
| Font Family | A collection of Type Faces that includes more than one specific style of font is called a font family. So, for the Arial typeface, the font family contains the font files for Arial (regular), Arial Narrow, Arial Black, Arial Bold, Arial Italic, and Arial Bold Italic.<br>SOURCE: HOWTOGEEK |
| Helper Text | This is often implemented to "help" a user understand more about a link they are hovering over. In a matter of Internet terms, this can also be referred to as link Title Text or image Alt Text |
| HTML | HTML is the standard markup language for creating Web pages.<br>HTML stands for Hyper Text Markup Language<br>HTML describes the structure of Web pages using markup<br>HTML elements are the building blocks of HTML pages<br>HTML elements are represented by tags<br>HTML tags label pieces of content such as "heading", "paragraph", "table", and so on<br>Browsers do not display the HTML tags, but use them to render the content of the page<br>SOURCE: W3SCHOOLS |
| Image Properties | A set of variables that can be adjusted relative to an image within the PageBuilder WYSIWYG editor. May include, but not limited to: source URL, alt text, height & width, alignment, link properties, stylesheet classes, accessibility title, etc. |

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| Mail Client/E-mail Client | In Internet, an e-mail client, e-mail reader or more formally mail user agent (MUA) is a computer program in the category of groupware environments used to access and manage a user's e-mail.<br>SOURCE: WIKIPEDIA |
| Meta-Description | Meta descriptions are HTML attributes that provide concise summaries of webpages. They are between one sentence to a short paragraph and appear underneath the blue clickable links in a search engine results page (SERP). However, depending on a user's query, Google might pull meta description text from other areas on your page (in an attempt to better answer the searcher's query).<br>SOURCE: MOZ.com |
| Meta-Keywords | A specific type of meta tag that appear in the HTML code of a Web page and help tell search engines what the topic of the page is. Meta keywords are distinguished from regular keywords because they appear "behind the scenes," in the source code of your page, rather than on the live, visible page itself.<br>SOURCE: WORDSTREAM |
| Meta-Title | Also known as a Title Tag. A title tag is an HTML element that specifies the title of a web page. Title tags are displayed on search engine results pages (SERPs) as the clickable headline for a given result, and are important for usability, SEO, and social sharing. The title tag of a web page is meant to be an accurate and concise description of a page's content.<br>SOURCE: MOZ.com |
| Navigation Name | The name that appears in the navigation of your site. This can apply to Top-level Pages, Subpages, etc. |
| Organic SEO | Organic SEO (search engine optimization) is the phrase used to describe processes to obtain a natural placement on organic search engine results pages (SERPs).<br>SOURCE: WEBOPEDIA |
| Page Layout/Template | As it relates to the VPanel, these are some of our standard design layouts available. Not all templates are utilized during development, likewise, some additional templates may be created for specific purposes. IE: Landing Page templates. |
| PageViews | A pageview refers to a view of a page on your website. This is measured per each view and usually reports a higher number than sessions. Example: One user visits your homepage, then your blog, then your contact us page then returns to the home page. This would be reported as 4 pageviews.<br>SOURCE: GOOGLE SUPPORT |
| Revision History | The revision history within your PageBuilder is associated with all of the edits to a particular page from the moment of creation until the current date and time. This feature allows you to recover previous content and versions of your page if something has gone awry or if you simply need to retrieve information from a previous version of the page you're working on. |
| Rollback | Rollback is a term that explains the process of restoring data, a database or program to a previously defined state, typically to recover from an error. |
| Sessions | A session refers to a user session or a group of interactions that take place on your website within a given time frame. Example: One user visits your web page and views multiple pages before leaving one hour later. This is counted as 1 session.<br>SOURCE: GOOGLE SUPPORT |
| Source View | The view within a WYSIWYG editor that allows you to switch from "What you see is what you get" view into the HTML Source Code view |
| Sublink | A lesser or subsidiary link |

| Sub-navigation | Also called: sub-navigation, page-level navigation. Local navigation is used to access lower levels in a structure, below the main navigation pages. The term "local" implies "within a given category." On a given page, local navigation generally shows other options at the same level of a hierarchy, as well as the options below the current page. Local navigation often works in conjunction with a global navigation system and is really an extension of the main navigation. Because local navigation varies more often than main navigation, it is often treated differently.<br>SOURCE: SAFARIBOOKSONLINE |
|---|---|
| Subpage | Subpage is a web page that appears below the top-level pages in your site navigation. Subpages typically appear as a drop-down menu in your navigation bar. |
| Sub-text | This is often used as helper text, but can also be utilized in a custom way depending on how your site was designed and developed by the VGM Forbin team. |
| Top-level Pages | Top-level pages are the primary pages of your website, such as: Home, About, Services, Products, Contact Us. |
| Typeface | The word "typeface" historically refers specifically to the shape and style of the letters, organized into a set based on the alphabet, numbers, and punctuation needed to completely express language. So, the collection of letter shapes that we know of as "Arial" or "Times New Roman" is called a typeface.<br>SOURCE: HOWTOGEEK |
| URL | A URL is the address of a specific webpage or file on the Internet. While all website URLs begin with "http," several other prefixes exist. Below is a list of various URL prefixes:<br>**http** – a webpage, website directory, or other file available over HTTP<br>**ftp** – a file or directory of files available to download from an FTP server<br>**news** – a discussion located within a specific newsgroup<br>**telnet** – a Unix-based computer system that supports remote client connections<br>**gopher** – a document or menu located on a gopher server<br>**wais** – a document or search results from a WAIS database<br>**mailto** – an email address (often used to redirect browsers to an email client)<br>**file** – a file located on a local storage device (though not technically a URL because it does not refer to an Internet-based location)<br>SOURCE: TECHTERMS |
| UX/UI Design Team | VGM Forbin's UX/UI Design Team consists of User Experience (UX) Designers and User Interface (UI) Developers. Our UX Designers focus on strategic goals, aesthetics, layout & composition fundamentals and branding standards, whereas our UI Developers focus on developing and optimizing the interface/build of how the design is implemented and how it reacts on multiple devices. |
| WYSIWYG Editor | VGM Forbin's content editing system which stands for What You See Is What You Get Editor. This is a stystem in which content can be edited in a form closely resembling its appearance when displayed on the final page. |

# ADDITIONAL RESOURCES

**W3 Schools**
A popular web site for learning web technologies online.
https://www.w3schools.com/

**Microsoft Office 365**
Office 365 is a line of subscription services offered by Microsoft, as part of the Microsoft Office product line.
https://www.office.com/

**Apache OpenOffice**
A free and open source project Compatible with other major office suites that includes these great tools:

- Writer a word processor you can use for anything from writing a quick letter to producing an entire book.
- Calc a powerful spreadsheet with all the tools you need to calculate, analyze, and present your data in numerical reports or sizzling graphics.
- Impress the fastest, most powerful way to create effective multimedia presentations.
- Draw lets you produce everything from simple diagrams to dynamic 3D illustrations.
- Base lets you manipulate databases seamlessly. Create and modify tables, forms, queries, and reports, all from within Apache OpenOffice.
- Math lets you create mathematical equations with a graphic user interface or by directly typing your formulas into the equation editor.

https://www.openoffice.org/

**GIMP**
A free and open source raster graphics editor used for image retouching and editing, free-form drawing, converting between different image formats, and more specialized tasks.
https://www.gimp.org/

**Adobe Photoshop**
If you can think it, you can make it with Photoshop CC, the world's best imaging and design app. Create and enhance photographs, illustrations, and 3D artwork. Design websites and mobile apps. Edit videos, simulate real-life paintings, and more. It's everything you need to make any idea real.
https://www.adobe.com/products/photoshop.html

**Adobe Photoshop Elements**
A raster graphics editor for entry-level photographers, image editors and hobbyists. It contains most of the features of the professional version but with fewer and simpler options. The program allows users to create, edit, organize and share images.
https://www.adobe.com/products/photoshop-premiere-elements.html

**BeFunky Photo Editor**
BeFunky Photo Editor lets you apply photo effects, edit photos and create photo collages with collage maker. Online photo editing and creating collages has never been easier.
https://www.befunky.com/

**TinyPNG**
TinyPNG is a free online compression tool for PNG and JPEG files. TinyPNG uses smart lossy compression techniques to reduce the file size of your PNG files
https://www.tinypng.com/