SmartFlex Solutions User Guide

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If there are any issues with your site please email:
<u>support@smartflexsolutions.com</u> or call 1.866.441.7235

SECTION I
Using Your SmartFlex Solutions Website

Welcome to SmartFlex Solutions! Provided below are easy to follow, step-by-step instructions for using the SmartFlex Solutions editing system. Enjoy the control you have over your own website.

Instructions for Editing:

- Enter the address of your website in any web browser (for example: www.mywebsite.com). If your website still has the Coming Soon sign, please put /index.php after the domain. (for example: www.mywebsite.com/index.php)Once on your website, at bottom of the homepage, in the footer, click on the word 'LOGIN' or for some older sites, click on 'flex'. A dialog box will open and you will be prompted to enter your SmartFlex Solutions username and password. Enter this information and press OK.

- The MAIN Tool Bar: After logging into the edit mode you will see the tool bar in the upper right corner. This tool bar allows you to save changes (disk icon), exit (X icon), see help videos (? icon) or add meta tags to your pages (cog icon).

ADDING & FORMATTING TEXT

In edit mode the pages will appear with text and graphic boxes indicated by a pencil icon for text and a picture frame for images. Just click on any icon to open a box.

To Add Text:

- In the text boxes you may change text or add text, just start typing and be sure to utilize the formatting features described below. You can also copy text from another document and paste it in the text field. Some formatting may not be saved when it is pasted, so be sure to double check the formatting once text has been pasted.

- After you have made the desired changes click "SAVE" in the editing tool bar, indicated by a floppy disk icon. If you neglect to click this icon before leaving the current web page your changes will not be saved, so this is very important to remember.

- When you are ready to leave the site click "EXIT" in the SmartFlex Solutions tool bar at the top right of the screen. The dialog box with the username and password fields will pop up again. Simply click OK at the bottom of the box to exit the edit mode.

Formatting Text:

The tool bar looks very similar to any word processing program's. There are icons which can be clicked on to apply certain styles and features.

Bold - highlight the text and click on the 'B' button.

Italic - highlight the text and click on the 'I' button.

Use the left, center, right and full justify buttons to format text position.

Use the Bullet button or the Numbering button to make lists.

Heading - Highlight the text, choose the heading style from the drop down under format.

Font Size - Highlight the text, choose the font size from the drop down.

Font Family – Highlight the text, choose the new font from the drop down under Font Family.

Font Color – Highlight the text, click on the small arrow next to the icon that is an A with a thick bar beneath it. Choose your color from those provided, or click on more colors to get more options.

To go back or forward a step or two, you can use the curved arrows in the tool bar.

Start a new paragraph – Press Enter/Return

To move down one line immediately beneath text – Hold SHIFT + Enter/Return

To completely remove the custom formatting you have added, highlight the text and click on the icon that looks like a small white eraser.

NOTE: Be sure to click on the small floppy disk icon in the editing tool bar to apply the change, then ALSO click the disk icon in the main tool bar in the upper right of the page to save any changes!

To Add Links:

⌖ Login to edit mode on your site.

⌖ In a different browser window go to the website that you want to link to and copy (highlight, right click -> copy [PC] or highlight, press control and click -> Copy [MAC]) the address in full from the address bar.

⌖ Go to the page on your site that you want to add the link to open a text box.

⌖ Type the text for the link, highlight the text, then click on the icon in the tool bar that looks like a tiny chain.

⌖ This will open a new window. In the First field paste the URL you copied. In the second field choose if you would like the link to open in a new browser window (ideal for pages not on your website) or in the current window (ideal for linking to pages within your site).

⌖ In the last field type the name of the link.

⌖ Next click on Insert

⌖ Be sure to click on the small floppy disk icon in the editing tool bar to apply the change, then ALSO click the disk icon in the main tool bar in the upper right of the page to save any changes!

To remove a link:

⌖ Highlight the link text.

⌖ Click in the icon in the tool bar that looks like a broken chain link.

Email Links:

⌖ Email links are just slightly different than other links, instead of a URL you add the email address and the text 'mailto:'.

⌖ Follow the steps above until you get to the fields to enter the URL.

⌖ Enter mailto:EMAIL ADDRESS HERE; for example: mailto:support@smartflexsolutions.com

⌖ Be sure to click on the small floppy disk icon in the editing tool bar to apply the change, then ALSO click the disk icon in the main tool bar in the upper right of the page to save any changes!

To Add Anchor Links:

An anchor link allows you to link to a specific location on a page on your site. Anchor links can be a bit tricky for the novice but will be easier if you have a grasp of regular links.

⌖ Login to edit mode on your site.

⌖ Place a word, sentence or paragraph that you would like to link to somewhere on the page then, just before the start of that text, place the anchor tag by clicking on the icon in the tool bar that looks like an anchor.

⌖ Enter the anchor word (MUST be ONE word).

⌖ Now you can go to anywhere on the page you want to create the link to the anchor and type the text, highlight it and click on the Link icon in the tool bar.

⌖ In the URL space enter #anchorword or if you are linking from another page, enter the URL for the page with the anchor link followed by #anchorword (example: http://www.mydomain.com/resources.php#article)

⌖ Choose to keep the link in the same window and give it a name.

⌖ Be sure to click on the small floppy disk icon in the editing tool bar to apply the change, then ALSO click the disk icon in the main tool bar in the upper right of the page to save any changes!

⌖ As an example, if you wanted to have a link from the bottom of a page back to the top of the page; at the top of the page just above the first text in a text box you would add the anchor tag by clicking the anchor icon in the tool bar and entering the anchor word "top".

⌖ Now, in a text box at the bottom of the page you can add the link by typing "Back to top". Highlight the Back to Top text, click on the link icon in the tool bar and enter #top in the URL space.

What you see is 'Back to top' but the link will search for the anchor word 'top' and go to that location which is at the top of the page.

To Add Pictures Into Image Gallery:

It is very easy to add and edit images in the SmartFlex Solutions edit system. While logged into 'flex' edit mode, click on any of pencil icons.

- In the tool bar click on the small image icon (bottom left).
- Click on the small icon to the right of the Image URL field.
- In the next window click on Upload (upper right of window)
- Another window will open, click on Choose Files to browse the images saved on your computer.
- Select the file and then click on open.
- Next Click on Upload to Server…a progress bar will appear.
- Once the progress is complete and at 100% click on the 'x' in the upper right to close the window.
- Your image will now appear in the image gallery.

To Delete an Image:

While logged into 'flex' edit mode, click on any of pencil icons.

- In the tool bar click on the small image icon (bottom left).
- Click on the small icon to the right of the Image URL field.
- In the next view you will see your image gallery.
- Click on the small arrow in the bottom right of the image thumbnail of the one you want deleted.
- Click on Delete.

⌖ It will ask you if you are sure, click 'Yes' to delete.

To Edit Images:

⌖ In the tool bar click on the small image icon (bottom left).

⌖ Click on the small icon to the right of the Image URL field.

⌖ In the next view you will see your image gallery.

⌖ Click on the small arrow in the bottom right of the image thumbnail of the one you want to edit.

⌖ A window will open with tools that will allow you to resize, crop, flip or rotate the image.

To Resize an Image:
⌖ Click the 'Resize' button and adjust the height number, typically around 200 is a good number. If the 'constrain proportions' box is checked the image will automatically resize proportionally otherwise you will have to manually find the correct proportions to make the image look correct.

⌖ After resizing the image click the Apply button to process the new size.

⌖ Click on the disk icon to save.

⌖ Enter a new name for the image (be sure to keep file extension)

⌖ Click on Save.

To Crop an Image:
⌖ Click the 'Crop' button

⌖ Place your cursor in the corner where you want the crop to begin and drag it to the opposite corner until you have the area you want. Once you release the cursor a box will appear around the image. You can place your cursor on any of the points around the image and drag them up or down, right or left, to adjust the cropped area.

⌖ Once you have the image crop set, click on 'Apply.'

- Click on the disk icon to save.

- Enter a new name for the image (be sure to keep file extension)
- Click on Save.

To Flip an Image:
- Click the ‘Flip’ button

- Mark the choice for Horizontal or Vertical

- Click ‘Apply.’

- Click on the disk icon to save.

- Enter a new name for the image (be sure to keep file extension)

- Click on Save.

To Rotate an Image:
- Click the ‘Rotate’ button

- Mark the choice for the degree of rotation.

- Click ‘Apply.’

- Click on the disk icon to save

- Enter a new name for the image (be sure to keep file extension)

- Click on Save.

To Insert Images into Text:

- Click on the pencil icon and go to the area in the text where you want to insert the image.

- In the tool bar click on the small image icon (bottom left).

- Click on the small icon to the right of the Image URL field.

⌖ In the next view you will see your image gallery.

⌖ Click on the arrow in the lower right of the image you want to insert.

⌖ Then click on Insert. You will see a preview of your image.

⌖ Enter a brief description of the image in the Description field and a title in the Title field.

⌖ If you want to adjust the appearance of the image, such as align Top, Bottom, etc, click on the Appearance tab and make the necessary change.

⌖ Then click on Insert.

⌖ Be sure to click on the small floppy disk icon in the editing tool bar to apply the change, then ALSO click the disk icon in the main tool bar in the upper right of the page to save any changes!

To Add HTML Code:

Adding HTML code you have obtained from an outside source is a simple process with the Flex Edit Tool Bar. However, be aware that some code may contain bugs or other issues which can only be addressed by the company that supplied the code. To enter HTML code follow the steps below:

- Obtain the code from your source and highlight it. (Be sure to get all brackets and characters of the code.) CTL + C to copy this code.

- Next go to your webpage where you want to add the code and click on a pencil icon.

- In the Tool Bar, click on the HTML button.

- A new window will open.

- If you already have text or links in the field they will appear in their HTML code form. Click in the area where you want the HTML to go…be sure not to disrupt the code already there. If there is no code, simply click in the window. CTL + V to paste, and your code should now appear in the window.

- Go to the bottom of the window and click on Update.

- Be sure to click on the small floppy disk icon in the editing tool bar to apply the change, then ALSO click the disk icon in the main tool bar in the upper right of the page to save any changes!

Adding Meta Tags

SmartFlex Solutions websites are search engine optimization (SEO) friendly by allowing you to add and update your own meta tags. A meta tag is a way to provide information about a website to the search engines. A description of your site and a list of keywords which indicate the subject matter are often used by the search engines to index their databases. Keep in mind that meta tags are by no means a guarantee of getting ranked by the search engines but they will help get your website noticed.

To Add meta tags:

- While logged in to the 'flex' edit mode click on the cog icon in the SmartFlex Solutions tool bar in the upper right corner.
- In the pop up window you can add a page title, description and keywords.
- Close the pop up window
- Then click on the Save icon
- Keywords are words of importance that appear on a specific page such as; company name, location or services offered. When you are adding keywords it is important to avoid the use of each keyword multiple times, for instance if your business was Yoga you should add the keywords; yoga instructor, classes, for kids... NOT; yoga instructor, yoga classes, yoga for kids... The search engines may penalize for too many instances of the same word, usually four times or more.
- It is a good idea to resubmit your website to the search engines each time you add or update your meta tags.

Search Engine Submission

Please be aware that just because you have a website that does not mean that your site will be ranked by the search engines. You must submit your site to the search engines to let them know that your site exists, further, you can add meta tags which were explained above.

To submit your website:

To Yahoo

- Go to the Yahoo home page: www.yahoo.com.
- At the very bottom of the page click the link 'Suggest a Site'.
- On the next page click 'Submit Your Site for Free'.
- Follow the instructions as to how to set up an account and submit your domain and all your webpages to the Yahoo search engine.

To Google

- Go to the Google Services page: www.google.com/services/
- Under 'Reach New Customers', click on 'Webmaster Central'
- Click on 'Learn More' under 'Submit your content to Google'
- Click on 'Add your URL to Google'
- Enter your URL address, including the http://
- Enter the security word and Click 'Add URL'
- Repeat this for each page of your website.

Keep in mind that it may take several weeks for the search engines to register your site. Also, you should resubmit your web pages whenever you make updates to your site.

SECTION II
Accessing Your CPanel

There are a few items such as email and web stats which must be administered through the Control Panel (CPanel) of your website. You may access the control panel by entering your web address followed by a colon and 2082. (Example: http://mydomain.com:2082). You will be prompted to enter your SmartFlex Solutions username and password. Once you have done so click 'OK'. Verify the email address for your account and click 'submit', then click 'next.' You are now in the CPanel.
From your CPanel you are able to:
- Manage email accounts
- Manage member logins (if your site has this feature)
- Check site stats

Email Options

Along with your SmartFlex Solutions website you have the option of creating up to 10 individual email addresses. Each email account can have its own password and can be easily modified to be forwarded to another account or to send an auto response.

To add a new email account:
- Log into your website's CPanel

- Under "Email Management Tools" click the Add/Remove Email Accounts icon.

- Enter the email address you want to create, along with a password.

- Click 'Create'

- If you plan on using Outlook, Outlook Express, or Mac Mail you can configure your email at this time by clicking 'Yes'. If you do not use a mail client, just click 'No.'

- If you chose 'Yes' the next screen will give you options to automatically set up the email, or the setting you need to do it manually.

To read webmail:
SmartFlex Solutions offers you the ability to access your email from any location by adding /webmail to the end of your URL. Example; www.mydomain.com/webmail
You will be prompted for a username and password. For the **username** enter the **full email address** of the inbox that you want to check and the password.

Using SmartFlex Solutions to check your email you have a choice of two different email browsers.

- **Squirrel Mail**, a simple, straightforward email browser gives you access to your inboxes, as well as all the options of a typical email browser without any aesthetics.

- **RoundCube**, a relatively simple program, with a few more features than Squirrel Mail.

- **Horde**, simply put, has bells and whistles. Not only can you retrieve, reply and compose emails, but there are also a host of setup options for this email browser. Everything from news groups to a customizable calendar to the time of the sunrise and sunset in your location. If you like to have options, this is the email browser for you.

To setup forwarding:
After you have created a few email accounts you may want to have all your email accessible from one location.

NOTE: Comcast, Yahoo and Hotmail have blacklisted SmartFlex's servers - resulting in blocking ALL emails to and from any SmartFlex client. This happened because a piece of 'spam' email was forwarded to one of their accounts by us. Yahoo makes no effort to determine where the email actually originated from.

While the problem has been corrected, these companies will continue to treat email we forward as coming from us - regardless of who actually sent it. This means that they will blacklist our servers again if anyone forwards another piece of spam.

Since emails are forwarded automatically - there is no way for us to know which emails might be considered spam. This has forced us to create a policy banning the forwarding of emails to Comcast, Yahoo and Hotmail accounts.

- In your websites CPanel, under "**Email Management Tools**" click the Email Forwarders icon to see current forwarded accounts.

⌖ Choose the domain for which this email is associated. Unless you have more than one domain on this account, you will have only one choice.

⌖ Then click Add Forwarder under Email Account Forwarders and enter the SmartFlex Solutions address that you want forwarded to another email address. Under Destination mark Forward to email address, enter the email address in the box provided, and click Add Forwarder at the bottom of the screen.

(note: the original inbox will still receive the email which stays on the server, to avoid this delete the email account that is being forwarded. In this way email will go straight to the forward email address.)

To set up auto responders:

Auto responders allow you automatically acknowledge to the sender that you have received an email or set up an 'out of office' message.

⌖ Under "**Email Management Tools**" click the 'Auto Responders'

⌖ Select the Domain for which the email is associated. Then click 'Add AutoResponder' link and add the appropriate text.

⌖ Very easy and professional.

Blocking Spam

In this day and age there is almost no way to block all the spam that gets sent to us. While a high percentage of spam is blocked at the SmartFlex Solutions server, some will still get through so there are a couple of things that you can do.

- The best recommendation is to set up a filter on your email browser that will send suspicious emails to a bulk folder which you will then be able to sift through to make sure there are no legitimate emails before you delete. Check with your specific email browser on how to set this up.

To Enable Spam Assassin:

- Under "**Email Management Tools**" click the '**Spam Assassin**' icon**.**

- After the description click the 'Enable SpamAssassin' button.

To Add Email Filters:

- Under "**Email Management Tools**" click the 'User Level Filtering' icon to filter emails coming to a specific email address, or 'Account Level Filtering' icon to filter emails coming to any email account on your domain.

- Click the 'Create New Filter' link.

- Follow the instructions on this page to filter email defined by Spam Assassin as spam. Please be aware that this will delete any email defined as spam, if you set this filter SmartFlex Solutions *will not* be responsible for lost emails.

Accessing Web Stats

⌖ Under Analysis and Log Files heading click the Awstats icon.

⌖ On the next screen you will see a listing of your domains. Click on the Magnifying glass icon to view your stats.

⌖ You are now able to view various statistical information regarding the viewing of your website - when, who, navigation, & referrers. The stats are broken down by month, week, day and hour, also you can see how often your site is visited by the search engines (robots/spiders).

⌖ This information is updated every 24 hours.

⌖ One thing is important to know when reading your stats, it is a common misconception that 'hits' are the important number to look for, this is not true. Hits are an inflated number that, really, only serve as useful to server administrators. What is useful information to you is Number of Visits and Unique Visitors. Number of Visits is the number of people that have navigated to your site and Unique Visitors are people that found your site so enjoyable that they decided to return.

SECTION III
Additional Website Features

(Please note: your website my not have all or any of the features mentioned below)

In addition to the SmartFlex Solutions editing system that allows you to edit your own website, there are many other optional features that are offered to enhance your websites functionality and appearance. If you do not have an item and think you may be interested in adding one or more enhancing features, please contact SmartFlex Solutions support for pricing and options.

The File Utility

The File Utility will allow you to add documents such as .doc's and .pdf's to your website for people to read or download. The File Utility can be added to an existing page where the documents will appear in a numbered list or they can be added to a hidden page which will allow you to place the documents anywhere on the site via a link. Most clients will have the file utility on their homepage.

Adding Articles:

⌖ To add articles using the File Utility you must have the document on your PC.

⌖ Go to your page that contains the File Utility and log in to the edit mode.

⌖ Locate the File Utility on the page. This will be a blank address bar with a 'Browse' button next to it.

⌖ Click the 'Browse' button. This will allow you to search your PC for the document that you would like to add to the site.

⌖ Select the document by double clicking on it or highlight it then click 'open'.

⌖ You will now see the location of the document in the search bar. Click the 'Save' button.

⌖ Your document has been added to the site. Further documents will be added in a numbered list on the page.

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Adding Links to files saved using File Utility:

⌖ From the numbered list of saved files you can add links to these documents anywhere on your site by right clicking on the document [PC] or press control and click [MAC] and selecting copy.

⌖ Go to the page on your site that you want to add the link to open a text box.

⌖ Type the name of the article, highlight the text, then click on the icon in the tool bar that looks like a tiny chain.

⌖ This will open a new window. In the First field paste the URL you copied for the article. In the second field choose if you would like the link to open in a new browser window (ideal for pages not on your website) or in the current window (ideal for linking to pages within your site).

⌖ In the last field type the name of the link.

⌖ Next click on Insert

⌖ Be sure to click on the small floppy disk icon in the editing tool bar to apply the change, then ALSO click the disk icon in the main tool bar in the upper right of the page to save any changes!

Using Web Protect

The Web Protect utility allows you to create a 'members only' section on your website which will require password authorization from a user that you can assign and manage.

To manage members:

- Login to your CPanel (www.mydomain.com/flexor)
- You should see a new category called 'Security'
- CLICK 'Web Protect'
- Navigate by clicking on the ICONs (not the text links)
- Choose the folder you want protected by clicking the TEXT LINK.
- CHECK 'Password protect this directory'
- 'Name the protected directory' should be same as directory name
- CLICK 'Save'
- Next screen should say 'Permissions Updated'
- CLICK 'Go Back'
- Now create a user at the bottom of the screen
- Enter 'UserName', 'Password', 'Verify Password'
- CLICK 'Add/modify authorized user'

The Calendar

The calendar is just that, a month to month calendar that sits on a web page that you can add events to to keep friends or clients up to date on just what is coming up.

- Just under the calendar click the 'Login' link.

- Use your SmartFlex Solutions user name and password.

- You will now see the calendar with red + symbols in the corners of the days.

- Click on the + symbol to add an entry.

- The name you give the event will be visible on the calendar and the description will show when you click on the event.

- If you want the time to show on the calendar you must select 'Timed Event'.

- Click 'Create' and you have added an event.

The Photo Gallery Page

The Photo Gallery Page will allow you to add a large amount of image to one page with the ability to 'click to enlarge'' each photo. The scroll bar will support an unlimited amount of thumbnails and will scroll left/right as it is filled-up.

⌖ To add images using the Photo Gallery you must have the file on your computer.

⌖ Go to your page that contains the Photo Gallery feature and log into the edit mode.

⌖ Find the blank address bar with a 'Browse' button next to it.

⌖ Click the 'Browse' button. This will allow you to search your computer for the image file that you would like to add to the site.

⌖ Select the image file by double clicking on it or highlight it then click 'open'.

⌖ You will now see the location of the file in the search bar. Click the 'Save File' button.

⌖ Your image file has been added to the site.

Now, when a visitor looks at the Photo Gallery Page and sees an image they like they can click on the image and a larger image will appear.

Media Player:

The Media Player will allow you to add video, audio or image files, such as .mp3's, .flv’s, .swf’s, .jpg’s, and .png's to your website. The Media Player can be added to an existing page or a new page. We can resize it to fit where you need it on the page.

Adding Files to the Media Player:

- To add files using the Media Player you must have the file on your computer.

- Go to your page that contains the Media Player and log in to the edit mode.

- Find the blank address bar with a 'Browse' button next to it.

- Click the 'Browse' button. This will allow you to search your computer for the file that you would like to add to the site.

- Select the file by double clicking on it or highlight it then click 'open'.

- You will now see the location of the file in the search bar. Click the 'Save File' button.

- Your File has been added to the site.

Each file that you add will be listed beneath the Media Player window.

If you need to convert your video file to a format compatible with the Media Player, please contact a client service representative for assistance at support@smartflexsolutions.com or call 866-441-7235.

Adding Images to the Flash Slide Show Player:

The Flash Slide Show Player will allow you to add and change the images used for the slide show on you own. You can use image files, such as .gif's and .jpg’s. This feature can be added to any page. We can resize it to fit where you need it on the page and you can choose from several options for the method of transition from one image to another.

Adding Image Files to the Flash Slide Show Player:

- To add files using the Media Player you must have the file on your computer.

- To add files using the Player you must have the image file on your computer.

- Go to your page that contains the Slide Show Player and log in to the edit mode.

- Find the blank address bar with a 'Browse' button next to it.

- Click the 'Browse' button. This will allow you to search your computer for the file that you would like to add to the site.

- Select the file by double clicking on it or highlight it then click 'open'.

- You will now see the location of the file in the search bar. Click the 'Save File' button.

- Your File has been added to the site.

Adding/Editing Pay Pal Products

⌖ Go to the page on your website that utilizes the Pay Pal feature and log in to the Flex Edit Mode.

⌖ On the page you will see multiple text fields:

PayPal Account: your email address used to set up your Pay Pal account and is required

Product Name: used for paypal and is required

Product Description: used for product description, not required for paypal Note: Use this area to list the price for the item so that it is displayed on your webpage. DO NOT use brackets or other style tags in this text.

Product Price: used for paypal and is required, does not appear on your webpage, but does on the Pay Pal shopping cart. DO NOT use the '$' sign, simply enter the numbers for the price.

Product Shipping: optional

⌖ Once you have finished adding your information, click on the floppy disk icon to save.

Example:
*Pay Pal Account: info@mydomain.com
*Product Name: Instructional Video
*Product Description: A video showing details on how to perform web editing. 30 minutes. $9.99 plus $5.00 shipping.
*Product Price: 9.99
Product Shipping: 5.00

* = required field