Zenit Systems

Zenit CMS Manual

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Dashboard

The **Dashboard** offers an overview of your current system status. By default, it contains links to your most used features and a graphic report area.

The graphic area renders data pulled from any module able to provide a **Timeline Feed**. Current known feeds are:

- CMS: Page Views as recorded by the Application
- CMS: Unique Visitors as recorded by the Application
- CMS: Page Views as recorded by Google Analytics (see CMS – Settings for setup)
- CMS: Unique Visitors as recorded by Google Analytics (see CMS – Settings for setup)
- eShop: Number of orders received on a daily basis
- Newsletter: Number of new daily subscribers
- Support: Number of new tickets submitted (viewable with your current access level)

Contacts Manager (CRM)

The **CRM** acts as your central Contact storage and management module.

Every **Contact** is represented by a **Virtual Card** (or VCard), holding the contacts primary information: Name, Address, Phone and Email. The Phone and Email are linked to generate an appropriate response from the system: clicking the phone number will prompt you to call said number through Skype, while clicking the Email will prompt you to launch an email application and send a message.

You can also add a note straight from the VCard of a Contact. **Notes** are usually a result of contacting the respective person, or a simple reminder that his/her status is changed in a way. All notes are arranged in a thread and can be observed in the Contact Details screen.

Contact Reasons and **Resolutions** may be defined and edited from the **Labels** section.

Multiple addresses may be defined for a single Contact, but only two of them can be selected as current Billing or Postal Address for a person. People may use additional addresses for family gifts or presents, and you are able keep these on file for future use.

Contacts may be organized with the use of **Companies** and **Labels**. While one contact may belong to to single Company, multiple labels can be attached to a Contact.

The **Calendar** section lists all notes and contact attempts, together with their reason and resolution for the currently selected date. This allows the administrator to keep an overview of a day's events.

eShop

Orders can be entered through the public website (using the Order Form object, see CMS section), or through the administration console.

An order is attached to a **CRM Contact** and can contain multiple products, discounts and taxes. Multiple transactions can be setup for an order, splitting the owed amount into multiple smaller payments. Similarly, multiple deliveries can be setup for subscription based orders.

The **Deliveries** section lists all deliveries scheduled for the selected date. This allows an administrator to keep an eye on a day's events and remaining deliveries.

The **Products** section is designed for minimal (and general) information. Any additional product attributes will need to be defined based on a custom business requirement. Besides product title, description, category and keywords, multiple images may be attached either through file selection or simple drag-and-drop from your computer to the file upload area. You can edit an image title, description and re-order by drag-and-drop.

Categories are logical containers used in product management. These are simple labels and have no direct effect other than filtering through category selection.

Discounts and **Taxes** can be defined as *Flat Values* or *Percentage* from the base total. Remember that they both apply to the base order value. Ex: if an order contains products totaling 100 currency units, after applying a discount this value drops to 90 currency units; the tax applied next will be computed considering the order at 100 currency units.

The **Settings** section allows the setup of your **PayPal** details and currency used throughout the eShop module. Your PayPal details can be obtain by logging into your secure account with PayPal, and accessing: My Account - Profile - My Selling Tools - API Access - Option 2, View API Signature.

Note: Your PayPal account must be registered with **PayPal Website Payments Pro**.

Note that transactions submitted to PayPal will also be carrying the same currency code so this must be a valid 3 letter international currency code. Ex: USD, EUR, AUD, GBP, etc.

Content Publishing (CMS)

Your public **Pages** use an inheritance system to render itself. When you create a new page you can choose to start from scratch or inherit an existing template. **Templates** are very similar to regular pages, but they may contain empty cells or slots, named **Editable Blocks**, which will be filled by all pages inheriting the template.

By inheriting a template, your page will contain all information from the parent template and you will be required to fill in the missing empty slots (Editable Blocks). Templates are also built on inheritance from one another, so you may have a root template which is inherited by a child template which in turn is inherited by a page.

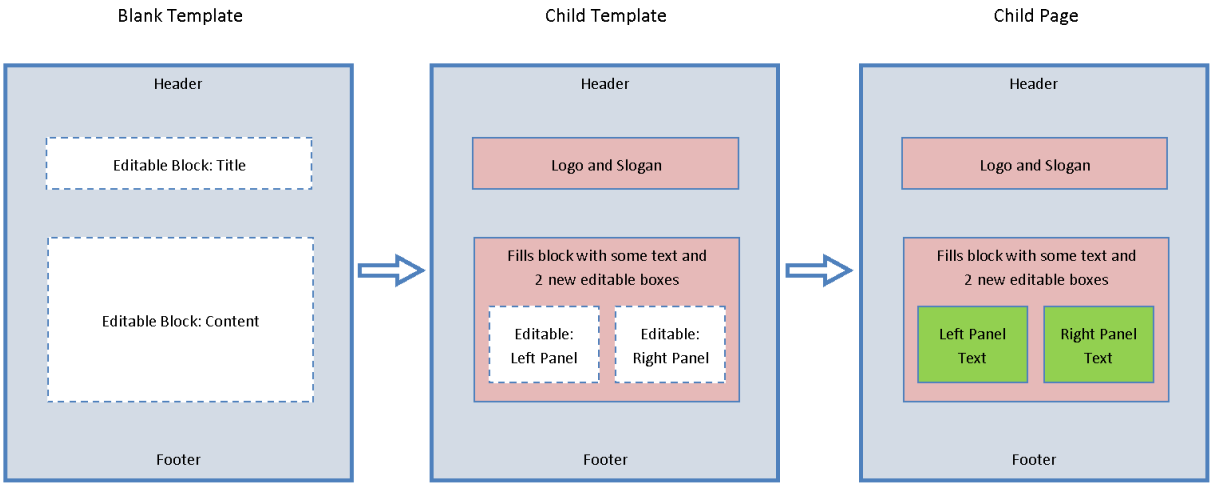


Fig. Page / Template Inheritance.

Child Page (green) inherits Child Template (red) which inherits Blank Template (blue.)

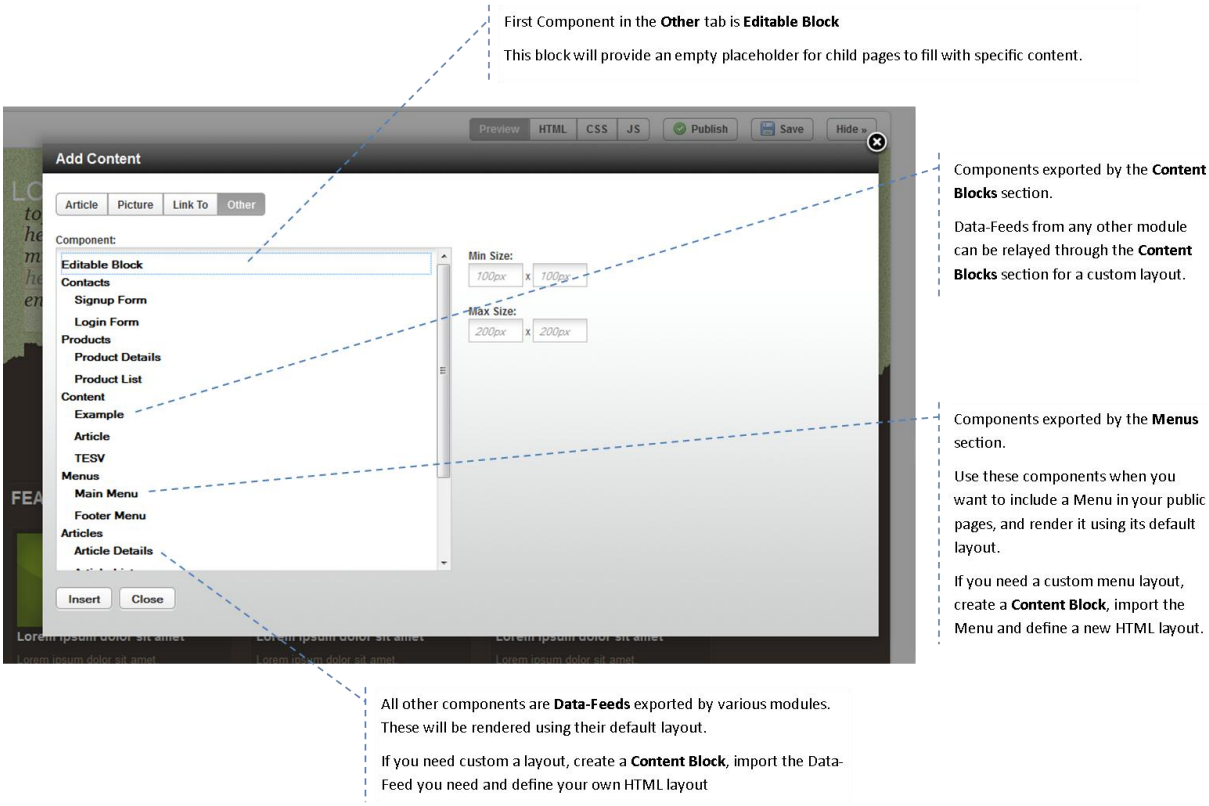
On the Page detail screen, you will find 4 sections:

- **Preview**: actual page, as it will be rendered for the public site
- **HTML**: contains the html code for each slot your page is required to fill
- **CSS**: contains the CSS code specific to this page. Note that all CSS from parent templates is also inherited, even if you won't see it here
- **JS**: contains any javascript code you wish to insert in this page.

Whenever you inherit a template, your child page will only be allowed to fill in the editable blocks allowed by the parent template. You may add new editable slots in a child template for future children to inherit and fill.

To enter content in an editable block, click the editable cell in your **Preview** screen and a **Content** box will pop out. You can use this box to add Rich text, Images, Links (to documents or internal pages) and Other components.

If you click the **Other** components tab, you will be presented with a list of additional CMS components you can insert in the current editable slot. The first component is always a new **Editable Block**; by inserting this component, you are specifying that this is an empty slot that will be editable by any future child inheriting the current template. All other components are being pulled out from various modules exporting them and they usually contain module specific dynamic data (feeds) or forms. All feeds coming from other modules have a default HTML presentation layer and may be directly included in a page or template, but you are able to change this default presentation layer by using the **Content Blocks** sections.

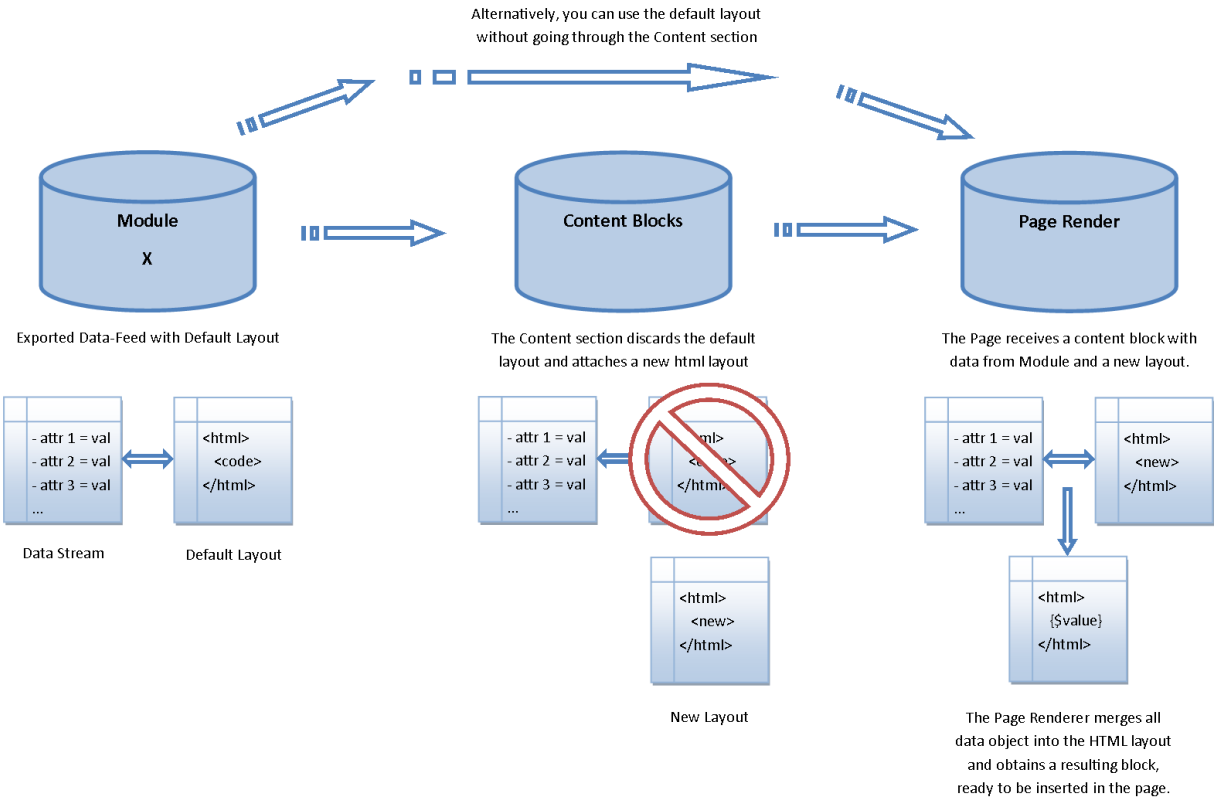


There are many cases when you want certain URL values to be passed to a dynamic component. For example, you want to create an article page, but since you don't want to create a separate page for every article, you will need to use an article ID to render a dynamic article block. This situation requires the use of **URL Params**, or **@params**. If you define your page url as **/articles/@id** , the page will be rendered when a visitor requests any url starting with **/articles/XX** . Ex: if user requests **/articles/2**, the page you defined will be matched as a candidate for rendering, the **@id** url param will be filled with the attribute **2** and sent to the **Articles** section to be rendered.

To keep track of your page history, your CMS makes use of a **version control system**. A page always has a **Working Copy**, which is what you see in your Preview panel. This is a draft only version, available to administrators and is not yet published to the public. Once you're happy with your page, publish the copy by pressing the **Publish** button and enter a short text describing your changes. For every published version, the system keeps a copy in your history list (right-bottom panel) allowing you to:

- **Revert** an older copy to be the current Active Version (public version)
- **Load** an older copy in to the editor, thus becoming the new Working Copy.

Content Blocks are used to render data streams obtained from other modules into a presentation layer suitable for the public site. Modules expose data streams with relevant information they handle, data which is relayed to the Content Blocks section which adds an HTML wrapper around the data for presentation purposes and forwards its result to the page renderer.



All data streams contain a list of available filters. These fields are used to pre-filter the data stream coming from an exporting module, and only the resulting filtered entries will be rent to be rendered. Some data streams will also allow URL filtering through the use of **@param** parameters in the URL. When this is the case, a hint with all available URL filters will be displayed. Ex: if you need to display all products from a single category, you will select the Product List feed into your content block, and use the category filter box to choose the category you need to render.

Known published data streams:

- **Product List**: a set of objects, each containing several product attributes with minimal list specific information. This stream is used for rendering a list of products.
- **Product Details**: an object containing all product attributes. This stream is used for rendering a product detail block.
- **Contact Signup Form**: contains signup specific form input boxes (name, email, etc)
- **Contact Login Form**: contains login form input boxes
- **Menu**: contains all menu items and sub-menus
- **Article List**: list of objects, each with minimal article attributes. Used for rendering an article list. The article list can be filtered by category or keywords.
- **Article Details**: object with all article attributes, used to render an article detail page.
- **Newsletter Subscribe Form**: contains a newsletter form input boxes.
- **Contact Form**: contains all contact form input boxes
- **Contact Message Thread**: contains an object representing the message to be rendered and a list of comments.

The Content Block details page features 3 main columns:

- HTML wrapper column (left)
- Data Feed and Data Attributes (center)
- Data Filters (right)

The HTML panel contains 3 tabs: Visual/HTML, CSS and Javascript. Though there are 4 buttons available, the Visual and HTML editor are in fact handling the same information, that is the HTML tags wrapping the data. When a Content Block assembles it's data, it stitches up it's 3 panels of code (html, css and javascript) together and sends this chunk to the renderer for integration with the rest of the page.

The HTML panel also allows the use of a simple scripting language, named **Logicode**, for cases where you want your information to be displayed in a dynamic manner. Logicode allows the following PHP similar instructions:

- **`{$ATTR}`** : is replaced by the value contained in the **$ATTR** attribute.
- **`{print $ATTR}`** : same as above, it is replaced by the value of **$ATTR**, but allows the use of most common PHP functions, like **`{print intval($attr)}`**
- **`{if ($attr == "value")} <html code> {/if}`**
    - the html code within the IF statement is included in the page only if the condition is evaluated as being True.
- **`{if ($attr == "value")} <html code> {else} <other code> {/if}`**
    - if the condition is computed as True, the first part of the instruction is included in the page and the second is removed. Similarly, the second part is included if the condition is computed as being False.
- **`{foreach ($list as $attr)} <html code> {/foreach}`**
    - repeats the html code within the for-each loop for each element in **$list**, where **$list** is a set of elements, like a product list.

A typical example of **Logicode** is an image gallery built using an article's image list:

```
{if count($ARTICLE.images) > 1}
<ul class="gallery">

	{foreach $ARTICLE.images as $IMAGE}
	<li>
		<a href="{$IMAGE.url}" title="{$IMAGE.title}">
			<img src="{$IMAGE.url}" alt="{$IMAGE.title}" /></a>

		<div class="title">{$IMAGE.title}</div>
		<div class="description">{$IMAGE.description}</div>
	</li>
	{/foreach}

</ul>
{/if}
```

Once you select a **Data-Feed** for a Content Block, all available attributes (center column) and filters (right column) are loaded into the Content Block page. Double-click an attribute to insert it in the active HTML panel.

*Note: The first data attribute is always the **Default Layout** coming with the selected Data-Feed. Use this layout to get an understanding of how to build your own custom layout.*

Menus are tree like structures of fixed title/link pairs. You can define any number of menus, depending on your needs. Ex: main menu with your central navigation, side menu going further into more detailed navigation, footer menu containing privacy and contact links, etc.

Note: defining a menu is not enough for it to be included in the public website. To add a menu in a public page or template, you must include the specific menu in a page through the Content Box (Page Details - Preview - Content Box - Other - Menus - Menu X).

The **Settings** tab allows an administrator to open or close the public site, and setup common functional pages. Once you close your public site, it will enter in "Maintenance" mode, meaning that only one page will be served to your public visitors: the Maintenance page. Additional functional pages are:

- **Home Page**, the first page presented to the visitor if no page is specified
- **Error Page**, presented to the visitor if an error occurred and the page he/she requested is not available. For example, if the page no longer exists, but the user had it bookmarked.
- **Maintenance Page**, used when your website is closed. This is the only page delivered to the user when your site is marked as Closed.

Articles

Articles are your main dynamic content tool. These are versatile entities, holding common attributes and can be used as news pieces, events or blog posts.

An article may hold:

- Article Body. If you want to provide an article snippet similar to a short description, include a horizontal rule "***<hr>***" in your article body. All content up to the **<hr>** tag will be considered a short description and a "Read More …" link will be provided.
- General attributes: title, keyword, category, publication date
    - Note: the publication date is a static date field and does not prevent the article from being published until the set date is reached. You will have to manually enable/disable an article.
- Event specific attributes: start and end dates
- Contact details: name, email, phone and website url
- Location specific details: venue, location address, and a map marker
- Multiple Links. If your article references additional information on the web, you may enter their title and web location in the links section. All links will be included in your public article page.
- Multiple Images. Click the Upload button or simply drag-and-drop a selection of images to the Images box and they will be promptly uploaded to your article. You can edit an image title and description.
- Enable Comments. If enabled, a comment form will be rendered on your public site under your article body and you will be able moderate all comments.

For information on setting up the layout of your articles on the public site, please refer to **Content Publishing - Content Blocks**. The Articles section exports a **Data-Feed** to the CMS module, and also provides a default layout which you can use. If you want to customize this layout, use the **Content Blocks** section to load the Article List or Article Details data-feed and define your custom HTML layout.

All comments you receive on published articles are collected and displayed in the **Comments** tab, awaiting your moderation. Click the comment status to toggle between *Published* or *Rejected*.

You can organize your articles into **Categories** and **Labels**. While you can only assign one Category to an article, you can assign multiple Labels. These have a functional value for your administration console, and a public filtering value. Categories and Labels can be relayed to the public site where visitors can choose to filter your content through them.

Documents

The **File Manager** is similar to your usual Windows or Mac documents explorer. Due to HTML5's advanced features, you're able to even **drag-and-drop** files from your computer to the Documents area and they will be promptly uploaded in the current folder.

Your current folder is mentioned on the top-left side of the File Manager, next to the Home button which resets the working folder to the top-most root folder.

The usual features of a File Manager are available: create/rename/delete folders, upload/rename/delete files. You may also choose to view the list of files in a thumbnail or list view.

Social Media

If your business requires constant social interactions Zenit Systems allows you to manage your **Facebook** account, **Twitter** account and **YouTube** Channel straight from the Zenit Admin Console, through the use of remote API connectivity.

By using the **Social Media** module, you will be able to grant access to multiple employees while keeping your passwords safe (you never have to share your social passwords with anyone). You will also be able to keep your personal and business accounts separate: while you're logged in with your personal account on Facebook, the Web Application will be logged in with your business account.

You can grant access to Zenit CMS on Facebook, Twitter or YouTube through the **Settings** section of your Social Media module. Once you grant access, the Application will pull your latest Facebook wall, Twitter comments, and YouTube channel, together with all comments. This data is not stored or cached in any way by Zenit and are pulled through the APIs provided by their respective service.

You will be able to submit posts to **Facebook** and reply to comments on your wall. Similar features are enabled for your **Twitter** account: tweet, retweet and reply. On your **YouTube** section, you will be able to upload videos, edit current video details and view/reply to comments.

Please note that your Facebook, Twitter or YouTube passwords are not required for this integration, they are not requested, obtained or stored at any time by Zenit Systems.

Mass Mailing / Newslettering

The **Newsletter** creation process is very similar to the CMS page publishing process (see **Content Publishing**). Newsletters can be created as stand-alone entities or you can derive them from a Template, through the use of inheritance. Similar to page publishing, a version control system keeps copies of every published state of your newsletters, so you can always load a previous version.

Before sending a newsletter, you're advised to test if using your personal email address. Hitting the **Test** button you will be asked for a test mailbox where a sample letter will be sent. Once you agree the letter is in good shape click the Send button, asking you for a **Recipient List**. The options you will be presented are all Recipient Lists you have available in your system, each coming from different modules you have installed. See below for known modules exporting Recipient Lists. If you want a specific subset of users to receive this newsletter, use the Recipient List tab to setup a filtered recipient list (read more below).

The **History** tab lists all past newsletters. Clicking the details of a past letter will display the rendered email you sent and a short statistical data relating to the letter impact and results.

The **Subscribers** tab lists all contacts who've registered for your newsletter. Though this section already exports a Recipient List to the Newslettering module, to be used when sending a new letter, subscribers can be further filtered and organized through the use of Recipient Lists.

Recipient Lists are filtered streams of user email boxes. This section scans the entire application for modules exporting Contact Lists and applies the filtering rules you setup, outputting new (filtered) Recipient Lists to the Newslettering module.

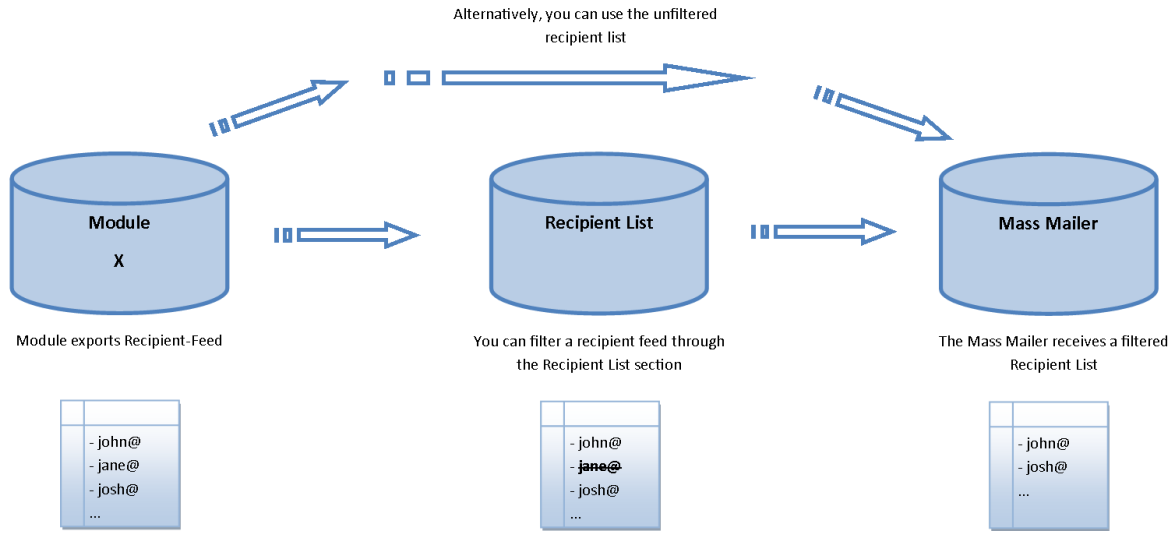


Fig. Using a filtered Recipient List

Module X exports a Recipient-Feed which can be used directly, or relayed through the Recipient List section for further filtering.

Known modules exporting Recipient Lists:

- eShop Orders: exports Client list
- Contacts (CRM): exports Contact list
- Newslettering: exports Subscribers list
- Newslettering Recipients: exports a filtered Recipient List (one of the above list)

Subscribers can also be organized under different **Categories** which you can use either as pure functional back-office labels, or you can consider contacts as being subscribed to different newsletters - by sending different newsletters to different categories of subscribers.

The **Settings** tab allows you to setup an external SMTP server to be used for by the automated mass-mailer service. If no SMTP server is setup, the local sendmail service is used. If you don't know what a SMTP server is, leave this section empty or ask your system administrator for counsel.

Contact Messages

The **Contact Message** section allows you to setup a contact form on your public site. Available fields for the form are: Name, Email, Subject and Message body. With every contact message you receive, a support thread is created in your Application, and a unique ID is given to the thread. Once you reply on a thread, an email is sent to the contact's email address with your reply and a public link where he/she may access the entire message thread.

You can use the **Subjects** section to define message topics. These will be relayed to the contact form page on the public site and the user will have to select a message topic/subject when submitting the contact form. By default, the Subject dropdown is included in the contact form, but you can choose not to include it if you don't need one. See **Content Publishing - Content Blocks** for more information about including a contact form in your public site.

You can use default replies to speed up resolving common or recurring issues. Just select a default reply from the comment dropdown and its contents will be pasted in your reply textbox.

Default **Replies**, contact **Topics** and **Labels** can be edited and managed from their respective section.

The **Settings** section contains your public thread URL. This should point to a page containing an **@uid** url code, symbolizing the unique message id, and the page should be setup from the **CMS module** to render a contact message thread. You can read more on working with the CMS from the CMS section of the manual.

Support

The main section found in your **Support** module is the **Tickets** tab. This is where you will manage all support issues related to your company.

A **Ticket** can be setup to contain:

- **Multiple Companies**. This grants access to all selected companies to the specified ticket.
- **Multiple Comment Threads**. For every ticket created you will get two default threads: one Public where ALL companies involved in a ticket can read and comment, and one Private thread where only your Company may read and comment.
    - Note: New threads can be created at any given time. Click "**New Thread**" in the upper-right corner of your comment list and select the Companies you wish to allow access to the new thread. Example: If you open a new thread and only select Company A and Company B for that thread, Company C will NOT be able to see or comment.
    - All user accounts of a Company will have access to the Company's tickets and threads.
- **Multiple Quotes** can be sent out to the companies involved in a ticket, based on the conversation unfolding in the comment threads. Quotes will only appear to the sender and recipient company. They initially enter a Pending state until the recipient Approves or Rejects them.
    - Note: Though theoretically only approved quotes should be available for invoicing, due to practical realities the system does not enforce this rule: All quotes are available for assignment to invoices.
- **Multiple Time Entries** can be defined at any given time, accounting for the time spent on a ticket's tasks. These can be later studied for statistical and management data.
- **Multiple Files** may be attached.
    - Files may also be uploaded through the comment form, if the file is relevant to the comment itself, rather than the ticket. The file will be then available for download next to your comment.

The **Quotes** and **Time Entries** tabs lists all your recent records and allow you to overlook the current support status, identify orphan or unpaid quotes and provide statistic data relating to your time entries.

The **Invoicing** tab lists all invoices you sent or received. Use the **Series** and **Index** boxes to setup identifiable information for your documents. For example, you can use different series for different companies you're invoicing, while keeping track of their order through their Index number.

Invoices are defined by selecting a subset of **Quotes** that were previously sent by your company to the invoiced company. By default, when you create a new invoice, all quotes relating to the invoiced company that have not been previously assigned to any other invoice will be included in the new document. You may choose to remove or attach individual new quotes.

Note that **Quotes** are the building blocks for an invoice, while **Time Entries** are only used for statistical purposes. An invoice file is also required for the record to be complete.

Using the **Users** tab you can manage all users registered with a support account under your company name. Along with the usual features to create, delete and update records, you may also setup individual access rights to your company's user accounts.

The **Companies** tab lists all companies that you are connected to and are registered with a support account. The company creation button enables a new blank company account and sends an invitation to the newly setup company email, with details to login and create new users. The newly created company will be connected to you and will be available to be included in your tickets.

The **Settings** tab allows you to enable email notifications. When enabled, you will receive an email for every new comment on tickets where your company is included.

Settings

Most modules already have a private **Settings** tab. All remaining system settings and options are located in the Settings module of your Administration Console.

The **General** tab contains typical website information:

- Website name, used throughout the public and administration side of your application.
- Your contact information (name and email) used in case of automated notifications and application errors.

The **Mail** tab allows the administrator to setup an external SMTP server to be used for any automated messages sent by the Application. If no SMTP server is setup, the local SendMail service is used, from the host machine. If you don't know what a SMTP server is, leave this tab empty or ask your system administrator for counsel.

The **License** tab shows information relating to the license you purchased. To license your copy of Zenit Systems CMS you can upload a license file or copy/paste the license text in the available textbox.

Zenit CMS uses an alternate **Human Validation** system (known as CAPTCHA). Instead of malformed images which are difficult to understand and will often be failed by actual humans, the user is presented with logical questions and a textbox requiring logical thinking and comprehension. Ex: What is two plus three? Answer: 5. If there are more than one accepted answer, you can separate them with a comma: 5,five. The human validation answer is not case-sensitive, so "five" is the same as "Five" or "FIVE".

The **Users** tab lists all Administrator accounts. Make sure users have access to the email box specified here, as any automated messages coming from the Administration Console will be sent to this mailbox. Use the key labeled button to grant or deny granular access to individual accounts.

To mass handle admin access rights, you can bundle multiple Administrators into **Groups** and setup group access rights.

*Note: For any given feature, the system checks if the **User** OR his **Group** is granted the required right. As such, if you want to deny access to a user, make sure both his/her account AND group don't have that specific access permission.*