Energy Circle Platinum

A GUIDE TO USING YOUR WEBSITE

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At a Glance

Energy Circle's platinum level websites allows users to easily maintain a beautiful, perfectly optimized website with minimal effort from the user. The options to add blogs, promotions, or even new services are just a few clicks away!

Getting Started

Logging In:

Logging in to your website is simple! Simply go to the URL: yourwebsite.com/user and
enter your administrative **username** (different than your email address) and **password** in the appropriate fields, then select the "Log In" button.
Note: If this is your first time logging in, follow the direct link you were emailed to set your own password. The subject of the email will be "An administrator created an account for you at (your website)". Always remember to check your spam folder!

Forgotten Password:
In the event that you forget your password:
1. Visit "yourwebsite.com/user"
2. Select the "Request a new password" link located under the password field
3. On the following page, fill out the email address related to your account
4. Select "E-Mail new password"
5. Navigate to your email to check for an email with the subject "Replacement login information for (you) at (your company)" **Always check your spam folder!**
6. Select the link in your email, this will bring you to a one-time login reset page
7. Select "Log In"
8. In the "Password" field, enter a new password, and fill out the following field to confirm your new password. Make sure the fields match.
9. Do not worry about filling out the rest of the content on the page, simply scroll down to the bottom of the page and select to "save" your password changes.

Administrative toolbar

The administrative toolbar is your map to altering your website. From here, you can easily navigate to update blogs, add other users, and add more content to your website.

Content:

The content option is an excellent resource for site administrators. This is where all of your site's content is housed. This includes, Articles, Blog Posts, Services, Staff, Testimonials and much more. If any content has been posted to your site, this is where you will find it. Searching through your content to find the post you're looking for is as easy as a regular "Google" search. Simply fill in the relevant search fields(title and type) to have your content narrowed down.

Panopoly:

Panopoly is a program we use to set up and keep your site running smoothly. Do not worry about this menu option, we have it all set up for you!

Structure:

The Structure tab allows you to alter various structures on your website such as menus and entityforms (that's just Drupal's way of saying "forms").

People:

People allows you to view the user accounts on your site. If you need to add a user in the future, contact your project manager at Energy Circle.

Reports:

The Reports tab is an excellent place to view all of your form submissions. If a user has filled out a form to schedule service or contact you, you will be able to view it here.

New Page Layout

Now that you are signed into your website, you may also notice a new view showing up on your individual website pages. At the top of each individual page you visit will now be a tool bar allowing you to edit the specific page.

View:
"View" is the page as it will look to your viewers. If you edit your page, you can select the view tab (after you save) in order to view the changes you made as your users would see them.

Edit:
The "edit" tab will allow you to make changes to the body of your page, as well as add images or even links. Visit the "Editing content" section to learn more.

Node Export:
This tab would allow you to move Drupal nodes from your current website to a new website. You will very likely never need to use this!

Panelizer:
Panelizer controls how the different pieces of your website come together. Do you see how your main menu is listed on the top right of your page sidebar? Or how your testimonial is at the bottom of the sidebar? This concept of content position is all organized in the panelizer. The order that your current site was set up in was carefully tailored to be unique for you and your business's needs, so we do not recommend changing your panelizer settings.

Content

Always save changes you make to any content. Whether you added a link, or added section of text to your page body, always remember to save!

Types of Content
Your website is uniquely tailored to your needs, as a result, you may have either some or all of the content types on your website. This section will also detail the important fields to fill out when creating each content type.

Article:
An article is an excellent place to publish any news worthy events that have to do with your business. For example, if your business is in the news, you have the opportunity to paste the article in, as well as link to the article on a separate site.

Important Fields:

- **Title:** Name of the Article
- **Display Date:** Date on which the Article was published
- **Article Type:** Type of article (news or press release)
- **Article Author:** Original Author of article
- **Featured Image:** Image related to Article
- **Body:** Article
- **Article Source:** The external link to the original article. Title of the link(generally the title of the article) and URL of article. Always select "open URL in a New Window" so that traffic is not directed off site.

Blog Post:

A blog post is a great way to voice your opinion of anything in your field, as well as an excellent way to keep your site updated and drive traffic. (If you have signed up for Energy Circle marketing services, we have likely already developed a strategic plan to keep your blog updated and driving traffic to your site!)

Important Blog Fields:

- **Title:** The title of your blog that will be displayed.
- **Display Date:** The date your blog will be shown as having been published.
- **Category:** If you have a lot of blog posts, selecting a category that is relevant to your blog is a good way for users to search through them.
- **Featured Image:** This is the image that will be coupled with this specific blog.
- **Body:** This is the section where you input all of the text in your blog.
- **Tagging:** Tagging a blog to certain content pages, case studies and services will allow it to show up as a top priority in the sidebar of those pages, rather than the usual 'latest blog post' showing up. This can be an excellent way for users to learn more about the service they are reading about via your blog.

Campaign Page:

A campaign page gives you the opportunity to run a short campaign. This is generally only used by the Energy Circle marketing team.

Case Study:

A case study is a place to house an individual case study that you may have gathered from projects your company has worked on. Case studies are

closely tied with galleries, galleries allow case studies to display images. In order to add an image to a case study, <u>you must add the image to related gallery</u> rather than the individual case study.

Important Fields:

- **Title:** The title of your case study
- **Summary:** To add a short summary of your case study, select the "Edit Summary" option next to the "body" header.
- **Body:** Enter the majority of the case study in this section. Generally, a case study sectioned by three categories, "Problem", "Solution", "Results". Each one of these sections should be made "Header 2"(See WYSIWIG section).

Content Page:

A content page is essentially an umbrella page, for example the "About" page of your website is most likely a content page. It is an arbitrary default page to house uncategorized content. It is unlikely that you will have to create content pages.

**Important Content Page Fields:**

- **Title:** This is the title that will be displayed when a user visits the page
- **Featured Image:** This is the image associated with your content page, it will display at the top of the page.
- **Menu Link:** On the right hand side of the content editing page, you will see the bold title "Menu Options". If you would like your content page to appear via either your auxiliary or main menu(generally, content pages appear in the auxiliary menu) select the box to "Provide a menu link". The "Link title" is the text that will show up in your menu. The field should be automatically populated to be the same as your content page title, in the case that it is not, make sure it is filled in correctly. "Parent" is a drop down menu that allows you to select the menu item that will be the "parent" of your content page. In the event that you want your content page to be a top link on the menu, just select <name of menu>.
- **Body:** The body of your content page will be the text that appears on your page. Headers and text will all automatically have styling added to them so that they are consistent with the rest of your website.
- **Call to Action:** If you would like your content page to have a service form for users to fill out on it, you must fill out the call to action fields. Visit the Call to Action section to learn more about how to fill these fields out.

Distinction:

A distinction is an award or title that your business holds. For example the "BPI Goldstar" certification. These distinctions automatically display in your footer.

Managing Distinction Display Order:

1. On the administrative toolbar, navigate to content > Manage lists
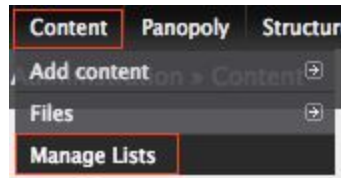
2. Scroll down on the "Manage Lists" page to "Rearrange Distinctions"

3. Click and drag arrows next to the distinction that you want to move to the place that you want it to be.
4. Select "Save" to save your changes.

Important Fields:

● **Title:** The title of your distinction, Ex. "Energy Star 2014"
● **Distinction Type:** Select the proper field that defines the type of distinction.
● **Logo:** This is the image that will be used to represent your distinction. Generally the logo of the certification is used.
● **Body:** If the distinction is selected by a user, or if you have a "certifications" page, the body text of your distinction will appear. Generally, the body of a distinction is a brief description of what the distinction means for your company.

Financing Option:

        A financing option relates to any rebate or financing program through the government, bank, utility or product manufacturer that your business is involved with. Adding a new financing option will cause it to automatically generate on your financing page.

        Managing Financing Option Display Order:

5. On the administrative toolbar, navigate to content > Manage lists
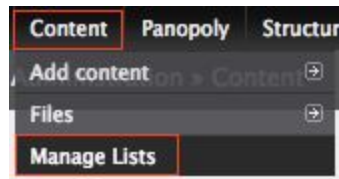
6. Scroll down on the "Manage Lists" page to the "Rearrange Financing Options" Section
7. Click and drag arrows next to the staff name that you want to move
8. Select "Save" to save your changes.
   Important Fields:

- **Title:** The name of the financing option that you are adding.
- **Logo:** Generally, a picture of the logo from the financing option.
- **Body:** Text describing the financing option/describing steps to apply or take advantage of the financing option.
- **Forms:** If there is relevant documentation to your financing option (for example, a pdf that the customer must fill out to receive the rebate.) the documentation can be uploaded via the "Add a new file" link. Select the "Choose file" option and select the relevant file from your computer. Select "Upload" and provide a brief description of the file. You can add multiple files to each financing option if necessary.

Gallery:

        A gallery is a content type that can host an array of images. Galleries are closely linked to case studies. **Rather than adding images to your case study, instead, add to the relevant gallery or create a new gallery to correspond with case studies.** Once the gallery has been added, have it appear show up on your Case Study by tagging it to the correct study.

- **Title:** The name of the gallery(make sure it is named so that it corresponds with the naming of the relative case study).
- **Gallery_image:** Select "Browse" under "Attach Media" in order to add images to your gallery. You made add a many as you wish.

Landing Page:

A landing page is a page that traffic is driven to. These are used by the Energy Circle marketing team for campaigns.

Promotion:

A promotion gives you the option to add any promotion(generally a seasonal offer or discount on a particular product or service) that your business is currently running. Promotions will show up on your homepage, service pages and content pages so your customers won't miss your special offers.

Important Fields:

- **Title:** The name of your promotion
- **Display Title:** Generally this is the name of the promotion as well, this is what will display to users.
- **Display Subtitle:** A short description of the promotion that will be seen when promotions are used in the sidebar of your website.
- **Promo link text:** The text on the button under the promotion that link to the unique promotion page. We recommend this stay consistent throughout promotions.
- **Display Start - End:** If you want your promotion to only be offered for a specific period of time, fill out these fields. First date and time fields for the start date and the second date and time fields for the end date. Your promotion will automatically stop being offered once the end date passes.
- **Body:** An elaboration of the promotion to be viewed when the link is followed to a unique page hosting the promotion.

Service:

A service is any service that your business provides, generally categorized under service categories. Ex. "Radiant heating", "Mini splits" and "Geothermal" may all be services.

Important Fields:
- **Title:** Title of the service. I.e. "Radiant Heating".
- **Service Image:** The featured image of the service. This should be a good reflection of the service itself.

- **Service Category:** In this field, tag the service to its category. For example, if the service is "Air Conditioning Repair" and your site has a service category "Cooling", you would put "Cooling" in the Service Category field.
- **Body:** A description of the service.
- **Menu Link:** On the right hand side of the page, you will see the bold title "Menu Options". If you would like your content page to appear via either your auxiliary or main menu(generally, services are located on the main menu underneath the relevant service category) select the box to "Provide a menu link". The "Link title" is the text that will show up in your menu. The field should be automatically populated to be the same as your content page title, in the case that it is not, make sure it is filled in correctly. "Parent" is a drop down menu that allows you to select the menu item that will be the "parent" of your service(it's relevant service category). In the event that you want your content page to be a top link on the menu, just select <name of menu>.
- **Call to Action:** If you would like your content page to have a service form for users to fill out on it, you must fill out the call to action fields. Visit the Call to Action section to learn more about how to fill these fields out.

Service Category:

A service category is a broader definition of service that allows you to categorize services in it. For example, Air Conditioning, Heating and Solar are all generally used as separate categories.

    Important Fields:
- **Title:** Title of the service. I.e. "Cooling".
- **Service Image:** The featured image of the Service Category. This should be a good reflection of the Service Category itself.
- **Service Group:** In this field, tag the service to its group(your website may not be using service groups). For example, if the service is "Cooling" and your site has a service category "New Home", you would put "New Home" in the Service Group field.
- **Body:** A description of the Service Category.
- **Menu Link:** On the right hand side of the page, you will see the bold title "Menu Options". If you would like your content page to appear via either your auxiliary or main menu(generally, Service Categories are located on the main menu either underneath the relevant service group, or as main menu options) select the box to "Provide a menu link". The "Link title" is the text that will show up in your menu. The field should be automatically populated to be the same as your content page title, in the case that it is not, make sure it is filled in correctly. "Parent" is a drop down menu that allows you to select the menu item that will be the "parent" of your Service

Category(Either a service group or just the <main menu> if no parent exists).

- ● **Call to Action:** If you would like your content page to have a service form for users to fill out on it, you must fill out the call to action fields. Visit the "Call to Action" section of this manual to learn more about how to fill these fields out.

Service Group:

If your thirst for organization has not been quenched, Service Group is a tier above service categories in terms of organization. So the tiers are Service Group > Service Category > Service. Examples of Service Groups are groups like "Residential vs. Commercial", or "New Construction vs. Retrofits".

Important Fields:

- ● **Title:** Title of the Service Group. I.e. "New Homes".
- ● **Service Image:** The featured image of the Service Group. This should be a good reflection of the Service Group itself.
- ● **Service Categories:** Tag the Service Categories that are children of the service group.
- ● **Body:** A description of the Service Group.
- ● **Menu Link:** On the right hand side of the page, you will see the bold title "Menu Options". If you would like your content page to appear via either your auxiliary or main menu(generally, services groups are located on the main menu underneath the relevant service category) select the box to "Provide a menu link". The "Link title" is the text that will show up in your menu. The field should be automatically populated to be the same as your Service Group title, in the case that it is not, make sure it is filled in correctly. Select <main menu>.
- ● **Call to Action:** If you would like your content page to have a service form for users to fill out on it, you must fill out the call to action fields. Visit the Call to Action section to learn more about how to fill these fields out.

Slide:

If you navigate to your home page, you probably see a big image slideshow at the top. This image is called a "Rotating Hero" and it is made up of slides. If you need to add a new picture to the hero, add a new slide!

Important Fields:

- ● **Title:** The title of your slide. This text will not appear anywhere when you slide is in user.

- ● **Display Title:** The main header text that will appear on your slide.
- ● **Display Subtitle:** The subtext that will appear on your slide.
- ● **Slide Image:** The image that you want the slide to be.

Staff:

If you need to add a new staff member, this content type is the place to do it. Once your member is added, it will automatically be called to your team page. You can order your staff page easily with the "Manage Lists" page.

Managing Staff Display Order:

9. On the administrative toolbar, navigate to content > Manage lists
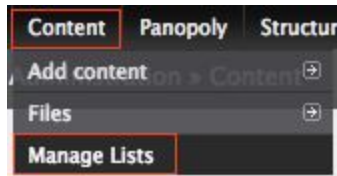
10. Scroll down on the "Manage Lists" page to the "Rearrange Staff List" Section

11. Click and drag arrows next to the staff name that you want to move

Rearrange Staff List

✥	Froelke
✥	Djonne
✥	Smith
✥	Thompson
✥	Jussila
✥	Swenson
✥	Hainlin
✥	Freeman

SAVE

12. Select "Save" to save your changes.

Important Staff Fields:

- **Title:** Title for content search purposes, generally employee name
- **First Name:** First name of staff member.
- **Last Name:** Last name of staff member.
- **Staff Title:** Title of staff member.
- **Staff Photo:** Photo of staff member(if available).
- **Department:** Check off the relevant department to the staff member.
- **Body:** A brief bio of the staff member.

Testimonial:

Testimonials are the content type that frame all of your customer testimonials. When you get a new customer testimonial, use this content type.

Important Fields:
- **Title:** The name of your testimonial for searching purposes. The title will not show up on the actual website.
- **Testimonial Name:** The name of the person who gave the testimonial.
- **Testimonial City:** The city where the testimonial giver is from.
- **Body:** The testimonial, generally either in italics or in quotes. Whichever option is consistent with testimonials already on your website.

Searching content:

Title: Search keywords in your content's title to narrow it.
Example: Air Conditioning

Type: Allows you to search by content type.
Example: Blog Post

Published: Allows you to select whether or not the content you search is currently published or unpublished.
Example: Published

Bulk Operations:

Bulk operations allow to perform an action on multiple selected content types. An example of this is if you want to "un-publish" multiple promotions at one time because the promotional season has ended. To do this, simple select the check boxes on the left side of the content you want to select, or, select the top most checkbox to select all content.

Next, select the operations drop down menu and select which operation you would like to perform.

Adding Content:
1. Select Content in the administrative bar
2. Select the "Add content" button in the top left corner of the page

Home » Administration » Content
Content

+ Add content

3. Choose the type of content you would like to add

Article
A news story, press release, or other type of article.

Blog Post

Campaign Page
Used as a one-off promotion landing page that is combined with a marketing initiative to

Case Study

Content Page
An important page to display to users on your site.

Distinction
A certification, membership, award, partner, etc.

Editing Content:

Either:
1. Select Content in the administrative bar
2. Use the search function to find the content that you want to edit
3. Select the edit operation under the specific content that you want

	TITLE	TYPE	AUTHOR	PUBLISHED	UPDATED		OPERATIONS
	Blog new	Content Page	Caleb	Yes	Sep 2 2015 – 5:20pm	▼	edit

Or:
1. Navigate to the specific page you would like to edit
2. Select the edit tab that appears under the main menu

View | Edit | Node export | Panelizer

Home / Air Conditioning

Content Editing Features:

Featured Image:
The featured image of the page is the image that appears right at the top of a content page. This option is located on the top right side of the edit view of your page.
Note: The featured image is not the same as the Hero Image on the home page. If you are editing the homepage, you must use a Slide rather than the homepage's featured image.

Changing your featured image(new image):
1. Select "Choose File"
2. Select an image from your computer and select open.
3. Select "Upload"
4. After the image has completed upload, select "Next"
5. Destination should be set to "Public local files served by the webserver."
6. Provide Alt Text and Title Text
7. Crop is necessary by selecting "Crop" and clicking and dragging your cursor around desired section of image to keep.
8. Select "Save"

Changing your featured image(Image already in use):
1. Select the "Library" tab in the top right corner of the featured image window
2. Use the search bar, or manually search the image pages for desired image.
3. Select desired image(indicated by a blue box forming around the chosen image)
4. Select "Submit"

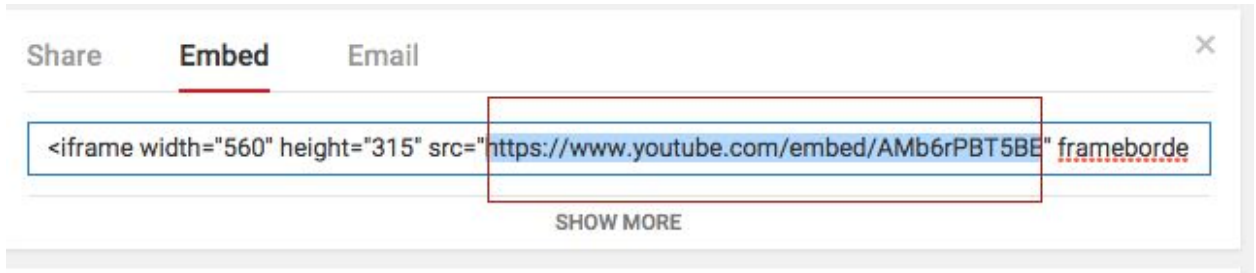<center>**Featured Video:**</center>
Instead of adding a featured image, you also have the option to add a video! This video will appear as the same size as your featured image would have been, and can be viewed right on the page.

Adding a featured video:
1. Make sure the video that you want to add is uploaded to Youtube
2. View your video on youtube and select the "Share" button located under the red subscribe button
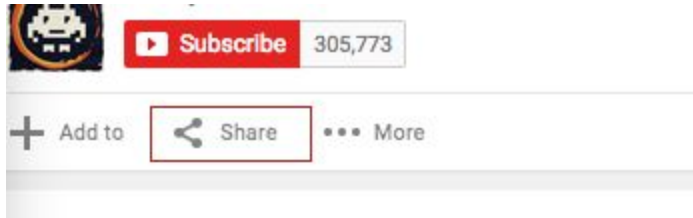
3. Selecting the share button will bring up three more tabs "Share" "Embed" "Email"
4. Select "Embed"
5. Copy only the embed link (Ex:https://www.youtube.com/embed/abcd)

6. Paste this Embed code in the "Featured Video" section of your service page or service category
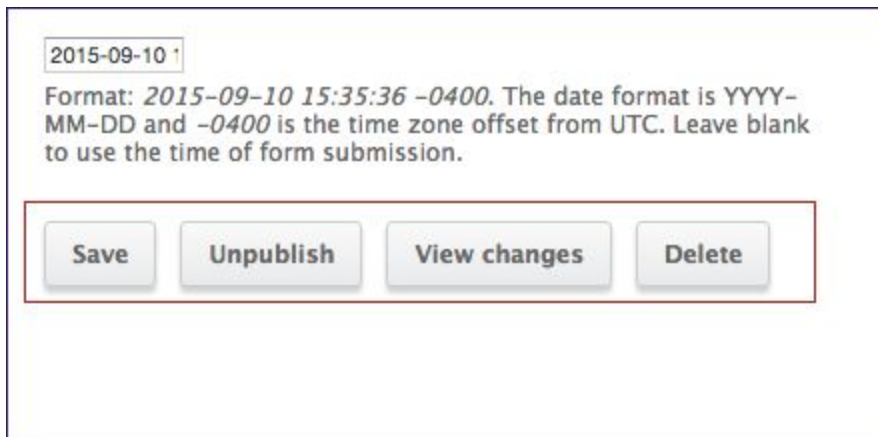
7. Save your page

Saving and Publishing your Edit:
Anytime you make any changes to your web page, or you want to either show or hide content you have already created, saving and publishing your content is important. These options are located on the right sidebar of your screen anytime that you are editing a content type. Always remember to "save" before leaving a page if you want the changes you have made to stick. In the event that you want to remove the content type from your website, but may want to have it available later, you can choose to edit the content type and select "Unpublish". This will keep the content under your list of content, but it will not longer be viewable to any visitors to your site. If you need to publish this

content once more, simply navigate to the content type and choose to edit, then select "publish".

The Wysiwyg(What You See Is What You Get)

The Wysiwyg is the series of buttons in the "body" section of any content post. It is essentially like microsoft word, where you can format all of you text as you please without using any complex code. There are several features of the Wysiwyg that you are more likely already familiar with (Bold, Italics, Strike through, Center). In order to format text with one of these buttons, simply highlight the text you want to format, then select the button. This format will automatically pick up the styles already on your website so everything will continue to match and appear fluid.

Unique Buttons
The Wysiwyg also has several unique features that allow you to easily manipulate your text body.

Link to Content:
The add link button allows you to add links from other websites or your own website to your web page body.

How to Use:

(Link from your own website)
1. Select the "Link to Content" Button
2. Under the "Search for content" field, type in a relevant keyword
3. Select the piece of content you want to add
4. Link URL will automatically be filled in from here
5. Select "Options" and choose "New Window"(_blank) as the target of the link. (This will open all links in a new window when clicked, which is a best practice for external links as it does not take a user off site.
6. Select "Insert Link"

(Link from outside source)
1. Select the "Link to Content" button
2. Choose a link URL from an external website
3. Paste link URL in the "Link URL" field
4. Select "Options" and choose "New Window"(_blank) as the target of the link. (This will open all links in a new window when clicked, which is a best practice for external links as it does not take a user off site.
5. Select "Insert Link"

Add Media:

The add media button has a picture of a small mountainscape on it and allows the user to add photos directly into their blog post. When you select the "add media" button, it will bring up a pop up that will allow you to either upload an image from your own computer, link an image from somewhere else on the web, or post an image that is already on your website.

How to Use:

(Upload)
1. Select "Add Media"
2. Select the "Choose File" button
3. Select an image from your computer and select "open"
4. Once your file has successfully loaded, select "upload"
5. Select "Next"

(Library)

1. Library hosts all of the images already uploaded to your website
2. Select the "Library" tab
3. Search and select the item that you would like to add

See More:

The see more button reveals more features of the WYSIWYG. There is a whole second level of buttons that provide excellent functionality.

Editor Function:

When using the WYSIWYG, make sure that the editor is always on WYSIWYG. You also have the opportunity to set it to HTML to write in direct code, but we do not recommend this.
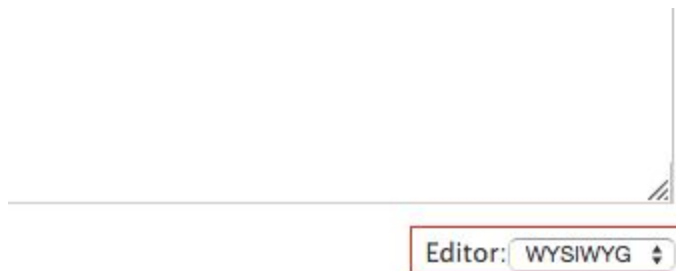
Paste as plain text:

Paste as plain text allows you to take text from other sources(for example text from Microsoft Word) and remove the formatting. This is best practice whenever you are pasting in formatted text. Text pasted from alternative sources can even have formatting that you do not notice and can often end up looking strange once published if not pasted as plain text. It is always best to format text in the WYSIWYG.
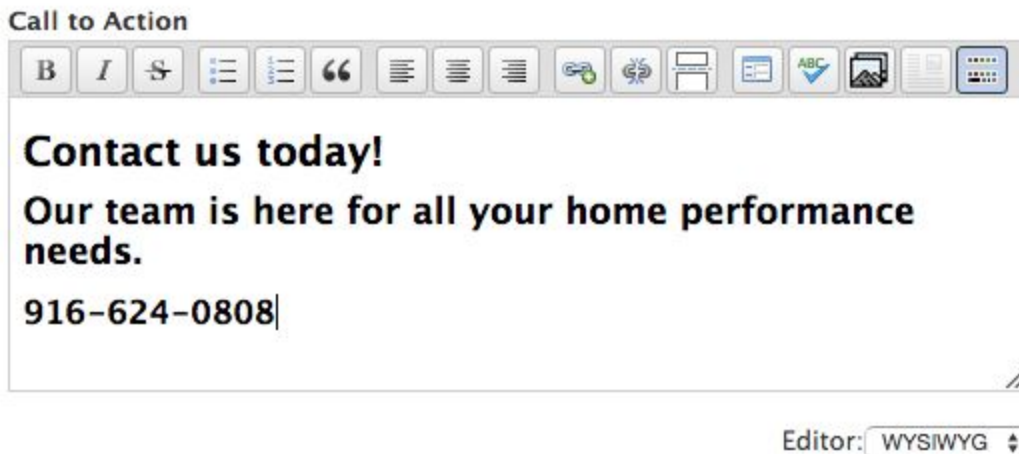

How to Use:

1. Make sure "Paste as Plain Text
2. Highlight and copy text from alternate source
3. Paste text

Calls to Action

Calls to action can be found below your content page's body content WYSIWYG. What is a

call to action? A call to action, or CTA is an instruction to the audience to provoke an immediate response, usually using an imperative verb such as "call now", "find out more" or "visit a store today". Often, these CTA's can be found in your web site's contact forms. Writing a call to action gives your business the opportunity to entice customers by new sales or promotions when filling out the contact form.

Call to Action

> **Contact us today!**
> **Our team is here for all your home performance needs.**
> **916-624-0808**

Editor: WYSIWYG

Editing a Call to Action:
A call to action can be edited just like the body of a content page.
1. Make sure that your call to action editor is set to WYSIWYG instead of HTML.
2. Type your message in the correct hierarchy
   Note: Your site is styled to have three different headers, the largest will always be "header one" and the smallest will always be "header three"
3. Input the correct CTA form (Schedule Service is used in most cases.) Begin typing "Schedule Service" into the CTA form field and select from the drop down to autocomplete.
4. Edit Button Text in the button text field if necessary, it is generally best to keep it consistent with the rest of your site.

CTA form

Schedule Service (4)

Button Text

Get Started!

Tagging Content

Tagging content allows you to relate content to other relevant pieces of content. For example, if you wrote a blog about air conditioning, it would make sense for that blog to appear on the air conditioning service page. Or, another example, if you want a certain promotion to be advertised under a service, this is another place to using tagging.

How to Tag Content:
At the bottom of the content editing view will be a list of different content types that can be tagged to the content type you are editing. Most of the time you will most likely want to tag blogs, articles, promotions, testimonials and case studies, to service pages, content pages or service categories.

1. Select the content type you want to tag
2. Click on the field to enter
   Note: This field is an auto complete field indicated by the circle on the right hand side. The field will only accept content types that have already been created.
3. Enter characters from the piece of content you want to select until the correct option shows up. Ex. If desired content page to tag is "About", begin to enter "Ab-" until the option "About" appears.

Menus

Auxiliary Menu: Your auxiliary menu is the menu at the very top of your website. It contains menu items such as the "About" section, as well as "Blog" and "Contact".

Main Menu: Your Main Menu is the main navigation of your site and where all of your service categories are hosted, such as "Heating", "Air conditioning", "Solar".

Changing your Menu Order:
1. Select structure in your administration panel
2. Select Menus
3. Choose the menu you would like to reorder and select "List Links"
4. Select the four arrowed icon on the left of a list link and drag it to where you you would like it.

   Note: By dragging left or right, you may accidentally change the level of the menu link, be sure to only drag up and down and always be aware of your menu order.

Entityforms: Entityforms are the forms that users fill out in order to provide you with their information, or schedule a service. More on these in the "Reports" section.

Reports

In the reports section, you can view all of the changes that administrators have made on your website, view submissions that your website have received from entity forms, view searches done on your website and even see the errors that users encounter when attempting to use your website. You should already be receiving form submissions via your email. If you do not see them in your email, always check your spam folder. In

the event that they are not in your spam folder, contact your Energy Circle project manager.

Viewing Entityform Submissions:
1. Select "Reports" in the top admin bar
2. Select "Entityform Submissions"
3. Select the form that you would like to see submissions from.
   Note: The 'Schedule Service' form and the 'Contact Form' is the most popular form to be filled out,
4. From here, select Table in the top right corner of the page to see a better view of your submissions.

5. Select 'View' on a specific submission for more

6. If necessary, you may always select the options "XML" or "CSV" which will export your entityform submissions into those text formats for future

viewing.