

# CMS Training Videos

This series of training videos aims to provide you with an understanding of CMS concepts and how they are used in Commerce Vision's Customer Self Service eCommerce Platform.

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## Users and Roles

### — Understand the difference between CMS Users and Website Users

This short video explains the difference between CMS Users and Website Users.

The Content Management System (CMS) is the key to maintaining your Commerce Vision website behind the scenes. So a CMS user is going to be an internal staff member (or possibly an agency contractor).

In contrast, a Web user is someone who only accesses the front end of your website - in other words, your customer.

These are 2 very distinct user types, with different roles, behaviours, and access levels, so it's critical to understand the difference before diving into User Management.

### — Set up and maintain CMS Users

Hired someone new for your web team? From time to time as staff change, you'll need to add and edit users who can access your CMS.

This video steps you through the process of creating a new user and assigning their roles.

Roles determine the user's access levels within the CMS, so if you've got someone who is only allowed to maintain product content (for example), you can configure their user account accordingly.

We'll also cover editing and deleting existing CMS users.

### — Set up and maintain Website Users

In the B2C world, customers generally self-register on a website and create their own user accounts.

But in B2B, the process may involve approvals or other requirements before a user is granted a login to the website.

This video shows you how to create a new user for your website if you don't offer self-registration, or perhaps you need to create a user with some specific level of access - say an Accounts user with the ability to reprint and pay their company's invoices.

It also covers editing, copying, and deleting existing users.

—	<p><b>Understand how User Groups work</b></p> <p>Want to personalise your website content for particular subsets of users? The Commerce Vision platform offers several ways for you to achieve this - one of them is with User Groups.</p> <p>Use our CMS to create groups of users based on any attribute you choose. They don't need to be related by account code or role; you can even import a list from a spreadsheet.</p> <p>These groups are then used to filter the display of your web content using our Layers functionality.</p> <p>This video shows you how to enable the User Groups feature, as well as how to create and edit user groups.</p>
—	<p><b>Overview of Roles and how they can be used to customise the way the site behaves for different audiences</b></p> <p>User Roles are an incredibly powerful feature within the Commerce Vision eCommerce platform.</p> <p>When using your website, a user's role will determine what their menu structure looks like, which pages and functions they can access, how long their login session lasts, what content they see, and much more.</p> <p>This quick video shows you where to find Role maintenance in the CMS, and gives an overview of the standard roles your site is equipped with upon implementation.</p>
—	<p><b>Overview of Advanced User Maintenance</b></p> <p>Have you got B2B customers who use procurement Cost Centres? Or perhaps your business uses Rep Codes for your sales team?</p> <p>Certain levels of eCommerce functionality require more in-depth user configuration, and that's where 'Advanced User Maintenance' comes in.</p> <p>This video gives you a quick look at where to find the Advanced User Maintenance screen in your CMS, and a brief overview of the types of attributes you can edit here.</p>
<p><b>Products and Categories</b></p>	
—	<p><b>Understand how Categories are set up and maintained</b></p> <p>The way you organise and display the products on your website is so important, and our CMS Category Maintenance allows each category to put its best foot forward.</p> <p>This video shows you where to find and edit category information such as description text, banner image, SEO data, and more.</p> <p>Using examples from a real live CV customer website, we show you how categories can look in practice.</p>
—	<p><b>Where does Product data come from?</b></p> <p>With our ERP-integrated eCommerce platform, you have a choice of where to keep and maintain your product data.</p> <p>Some organisations want everything in the ERP as the central point of truth. Others want just the product code and pricing from the ERP, and all else maintained online. Still others choose a combination of the above for their approach.</p> <p>Each business is unique, and our platform caters for different scenarios.</p> <p>Whatever your approach, maintaining product information in our CMS is easy, user-friendly, and not reliant on having high-level access to ERP data. This video provides a brief overview of the two methods.</p>

## — Understand how Products are maintained

You've got a goldmine of product information to offer your customers, and here's where you can maintain it all.

This video shows how easy it is to update all that rich product content such as:

- Product title & subtitle
- Description text, bulleted lists
- Delivery and pickup options
- Price display versus POA
- Free freight and digital delivery

(Note - see our *Product Media* video for how to maintain images and video content)

You'll also see how the master product data (integrated from your ERP) is displayed for reference during editing.

## — Understand how to assign Products to Categories

A brand new product has just been added to your website. Now it needs to be put into the correct product category.

In this video we demonstrate how to assign a product to a category (or multiple categories) from the product maintenance screen.

This method is great for one-off changes at a product level. If you need to assign lots of products to different categories in bulk, we cover that in a separate video.

## — Understand how to attach documents to Products

Offer your customers more in-depth product information with a document download.

You can provide technical specs, shiny brochures, or safety data sheets, for example. All common file types are accepted, and managing these document files for your products is simple.

This video takes you through the process of uploading a document and editing some of the display options associated with it.

## — Understand how to use Product Features to allow for filtering of Products in search results

Product Features are all those characteristics that allow us to "filter by" when we browse a page full of products on a website.

Your products can have as many features listed against them as you like. In fact, more is usually better, as this is the kind of metadata that helps your customers find what they're looking for quickly when they're on your site.

This video shows you how to add and edit features against an individual product in the CMS, as well as creating a brand new feature to be used across multiple products.

—	<p><b>Understand how to attach images and video to Products</b></p> <p>Images are arguably the most important part of your product detail page. How many of us have ever purchased a product without first knowing what it looked like?</p> <p>Images help visually explain your products and can mean the difference between Add to Cart and abandonment.</p> <p>Adding video to your product pages is also a great way to engage with your customers. Product videos let customers learn more about various brands and models, while tutorials and how-to guides can be a great cross-selling or up-selling tool.</p> <p>This video shows you how to upload images and videos for your products in the CMS. It also covers image switching with tags, which is used for different product colour options (for example).</p>
—	<p><b>Understand how to attach SEO information to Products</b></p> <p>The Commerce Vision CMS allows you to easily maintain SEO (Search Engine Optimisation) data for your products.</p> <p>From the product URL to the page title tag, to the meta description, you can ensure Google shows your products in their best light when people are online searching for the things you sell.</p> <p>This video shows you where to update product SEO data, and gives some examples of what that data looks like in practice.</p>
<b>Campaigns &amp; Promotions</b>	
—	<p><b>Set up and maintain Product Campaigns</b></p> <p>Product Campaigns are a great way to feature a group of products on your website.</p> <p>Campaign products might be sale items, top sellers, highlighted brands, or any other criteria you wish.</p> <p>You can display them in a sliding carousel, or in a grid / list layout.</p> <p>Adding, removing, and editing campaigns in the CMS is quick and easy. This video guides you through the process.</p>
—	<p><b>Set up and maintain Promotion (coupon) Codes - part 1 of 2</b></p> <p>Looking to give your loyal customers free shipping this month? Or perhaps a coupon for a discount on their next large order? You need a promotion code.</p> <p>Our CMS makes it easy to create customised promotions to support your marketing activities.</p> <p>In this video (part 1 of 2), we explain the different types of promo codes available to you (cart discount, freight, buy 2 get 1 free), and then walk through the setup of a cart discount promotion.</p> <p>We also cover tiered discounts and product exclusions.</p>

## Set up and maintain Promotion (coupon) Codes - part 2 of 2

Now that you've got your promotion code set up, you might want to customise some of the UI options and usage rules.

Our CMS allows you to specify rules such as how many times a coupon can be used (e.g. 1 per person), whether it's available with other offers, or even a specific list of eligible users.

You can also customise the success & fail messages displayed to users when they apply the promo code coupon to their cart.

In this video (part 2 of 2), we dive into these more advanced settings available when configuring promo codes for your website.

## Templates

### Pages & Templates

Looking to create a new content page for your site? Maybe you need to update your 'About Us' staff photos, or add a temporary stocktake message to your checkout page.

This quick video shows you where in the CMS you can find (and manage) essentially every page of your website!

If you'd like a little more in-depth info on what Pages & Templates are and how they work, check out our knowledge base article [here](#).

### Favourite Templates

Go ahead, admit it. You play favourites. It's okay, we all do.

The Commerce Vision platform equips you with *dozens* of pages and templates right out of the box, making it easy to build content and customise your site.

All those templates = lots of flexibility, but the sheer number can be intimidating!

There will always be those pages you find yourself revisiting and updating more frequently than the rest.

We thought they should be easy to find and quick to access - hence, 'My Favourites'.

### Template Zones

The look and feel of your website depends on the *layout* each page template follows.

And the look and feel of each layout depends on the *zones* that make it up.

Zones are an important part of your page structure, and they dictate how your content appears when switching between mobile, tablet or desktop devices.

Confused? It's simple, we promise.

This video shows you what the zones look like in a template, how they work on the front-end, and how you can easily drag and drop content between zones.

## Template Layouts

Dragging and dropping widgets from one zone to another in a template is easy as pie.

But what if you want to completely rearrange the way that page's zones are organised?

Enter [Layout Creator](#).

This video demonstrates how to:

- a) view all the existing layouts available for your website,
- b) assign a different layout to a template you're working with,
- c) create a brand new layout from scratch.

A powerful design tool, this may be one for the advanced players. We recommend getting familiar with it on your Stage site first.

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