

# SquareHook HelpGuide

*Getting started with the SquareHook CMS*

v1.3



# SquareHook

Your website made easy.



# SquareHook Help Guide

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## Introduction

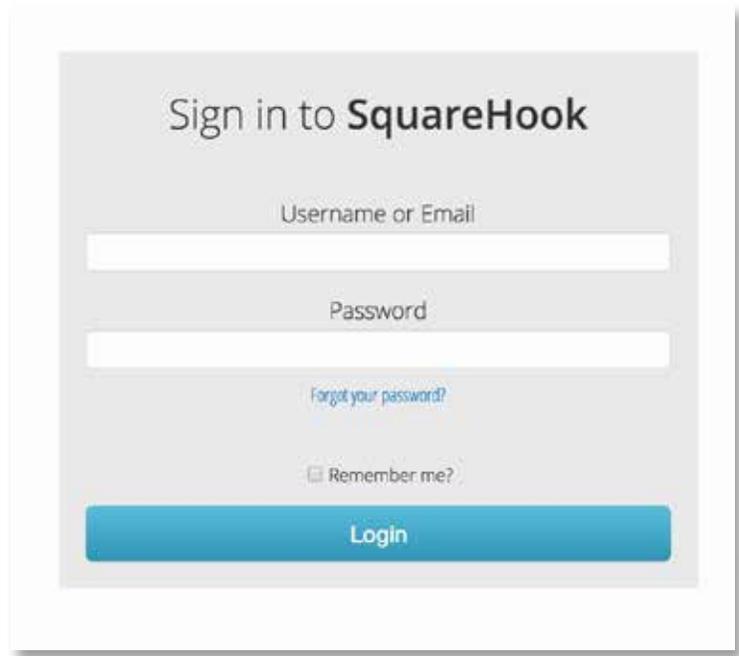
Welcome to using the SquareHook Content Management System (CMS)! It is our hope that as we continue to shape and improve the powerful SquareHook platform, you, the user, find it an intuitive and easy process. We've created this help guide to help you along the way. We are constantly working towards a better CMS, and your feedback is essential. We invite you to notify us of any improvements that would make your experience a better one.

Warm Regards,

*The SquareHook Team*  
The SquareHook Team

## Login

Sign into SquareHook websites, <https://yoursite.squarehook.com/account/logon>. Or always you may use <https://squarehook.com/account/logon>. Enter your User ID and Password



The image shows a login form for SquareHook. The form is titled "Sign in to SquareHook" and contains the following elements:

- A text input field labeled "Username or Email".
- A text input field labeled "Password".
- A link labeled "Forgot your password?".
- A checkbox labeled "Remember me?".
- A blue button labeled "Login".

# Editor

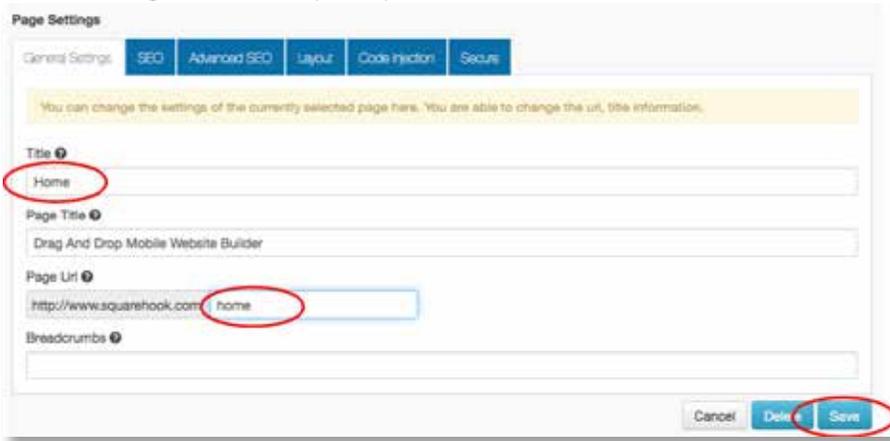
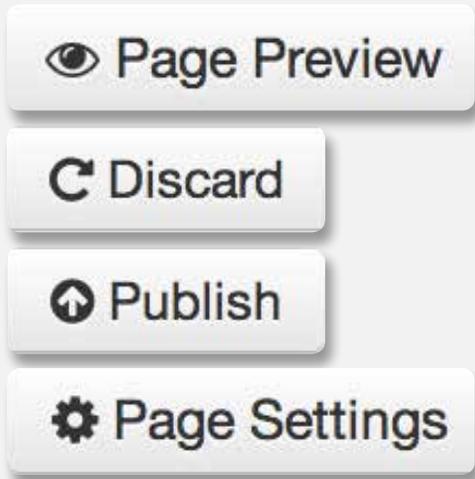
## Key Buttons

To **VIEW** the site you have been working on, click the **“Page Preview”** button.

To **DELETE** recent work done, hit the **“Discard”** button. It will take you back to the last time you saved and updated your site.

To **SAVE** the work rendered hit the **“Publish”** button.

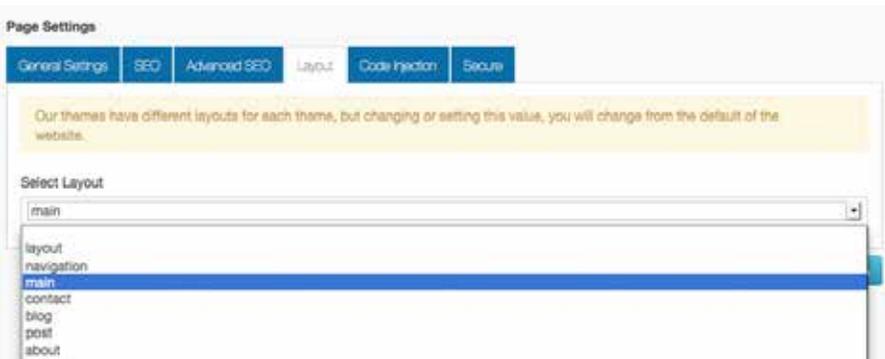
To **ADJUST PAGE SETTINGS** hit the **“Page Settings”** button. This dialogue box will open up.



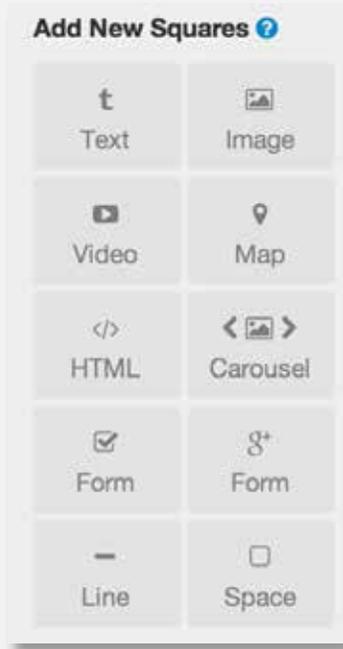
Here, you can add key words or phrases to the **CODE INJECTION** to get better **SEO** results.



Here, you can choose which **LAYOUT** you'd like to assign the page by selecting the button. Here you can select the layout by clicking from one of the dropdowns.



Editor

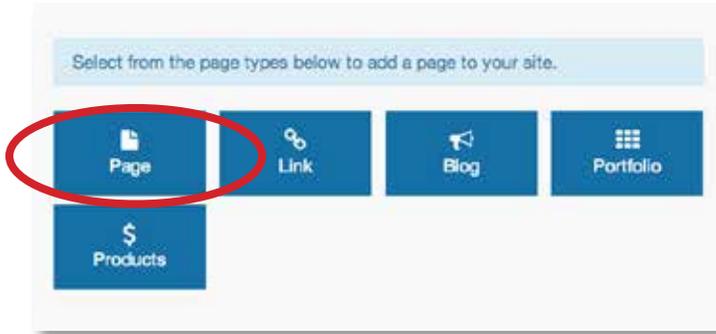


*Add a square*

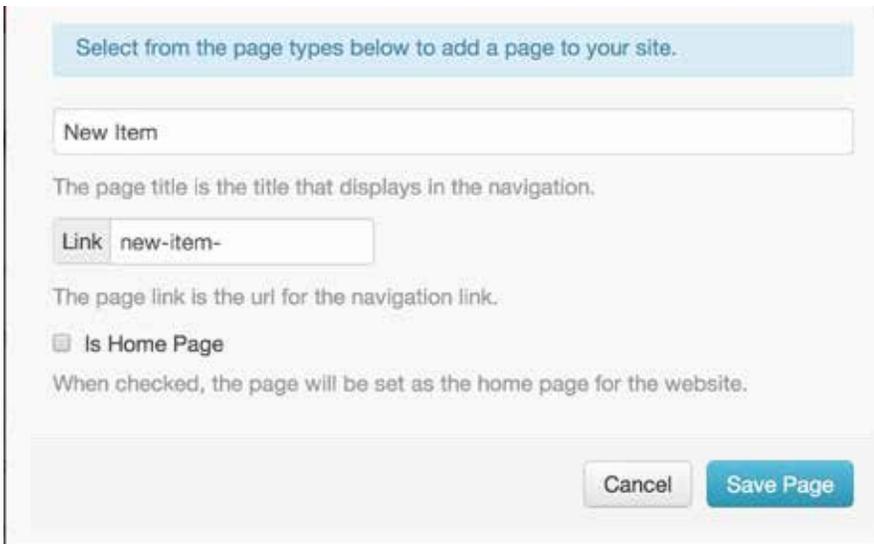
Near the top right corner of the Editor, there is section to "Add New Squares" box. A "square" represents a certain element on your website. You can add a text box, images, HTML, links, etc.

### Adding a Page

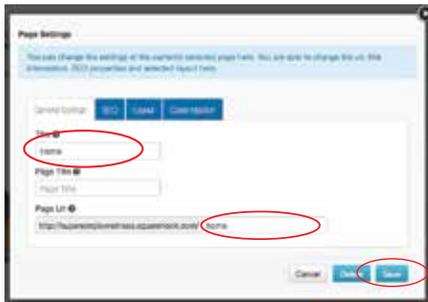
Click on the "new page" button. A box will pop up. Click on the PAGE button



Fill in the name of the page, a URL will automatically populate. Click on the "save page" button when you're done. You can now begin adding text, forms, images, etc. to that page.



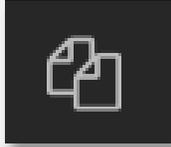
NOTE: to change the name of an existing page, click on the "page settings" button.



A dialogue box will pop up where you can change the title of the page. Be sure to edit the page URL area, and hit SAVE to be sure your changes are made.



Adding a Page



 Page Settings

### *Duplicating a Page*

Click on the button located on right of any navigation/linked page. This button will replicate the page you double clicked to copy.

The newly duplicated page will drop to the bottom of the navigation. It will often have the same title with a 1 at the end. (i.e., if you duplicate the About Us page, its duplicate will be About Us 1)

Be sure to double click on the newly duplicated page to adjust the page settings. Go into the “page settings” to adjust the name of the page and the URL if you choose.

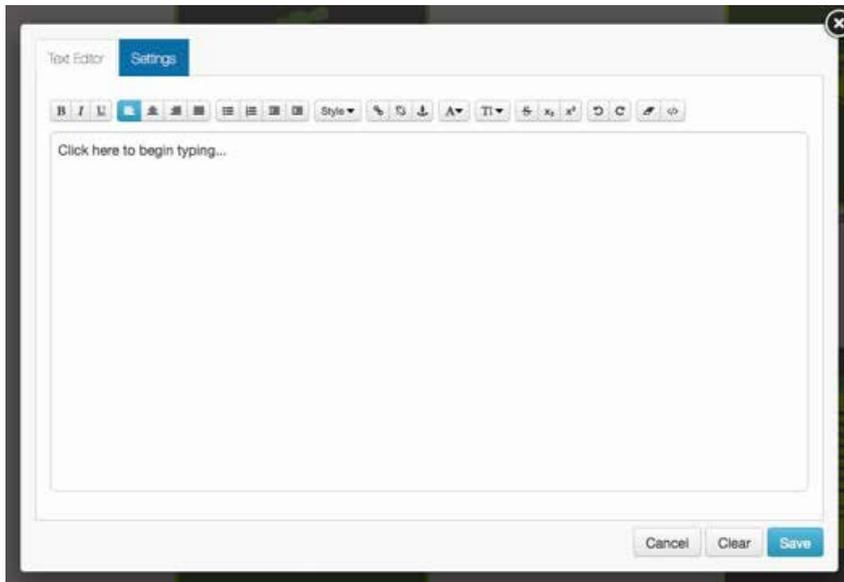
Feel free to make changes to the newly duplicated page.

## Adding Text

Drag a “Text box” from the menu on the right onto your active page in the editor.

Once you have dragged the Text Box into the editor, a box will appear. Just click your cursor in the box and you can begin adding text.

While using the text square, a word toolbox will appear if you want to make adjustments to your text content.



To MOVE your text box around to another location on the active page, click on the box and drag the box around to the desired area. Or you can select icons to move the box right or left or for up or down

The blue boxes surround the areas of the text indicate where the text can be placed (above, below, right, left)



If you don't like the text you composed and want to delete it, just press the “discard” button on the right side of the word toolbox.

Be sure to hit the “publish” button when you want to save.



Click here to begin typing...

**Adding text**





### Add a Link

While in a text box, highlight the word/s you would like to link to another page. In the text box you will find a link image . Click on it.

In the URL spot, enter in the website you would like to link to, then hit the "ok" button.

The image shows a "Link" dialog box with a title bar and a close button (X). It has three tabs: "Link Info", "Target", and "Advanced". The "Link Info" tab is selected. Inside the dialog, there is a "Link Type" dropdown menu set to "URL". Below that is a "Protocol" dropdown menu set to "http://". To the right of the protocol dropdown is a text input field labeled "URL" which is currently empty. At the bottom right of the dialog are two buttons: "Cancel" and "OK".

## Linking Email

Email linking works similar to linking any URL.

Click on the link icon (looks like a chain) and simply select the Link Type. It will drop down to several options.

A screenshot of a 'Link' dialog box. The 'Link Info' tab is selected. The 'Link Type' dropdown menu is open, showing options: 'E-mail' (selected), 'URL', 'Link to anchor in the text', and 'E-mail'. Below the dropdown are text input fields for 'Message Subject' and 'Message Body'. At the bottom are 'Cancel' and 'OK' buttons.

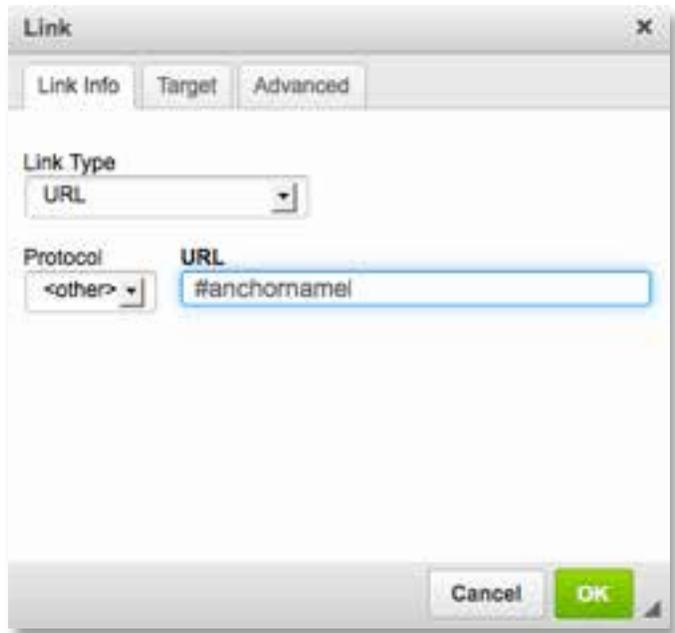
Select the E-mail option, and an email area box will populate for you to fill in. Be sure to select OK to save the email link.

A screenshot of the 'Link' dialog box, similar to the previous one, but with the 'E-Mail Address' field highlighted by a red oval. The 'Link Type' dropdown is still set to 'E-mail'. The 'Message Subject' and 'Message Body' fields are visible below.



### Add an Anchor Tag

While in a text box, highlight the word/s you would like to anchor link. In the text box you will find a link image . Click on it. A box will pop up, where you will type in your #anchormame (be sure to add a # tag before your word) Once you do, click "ok".

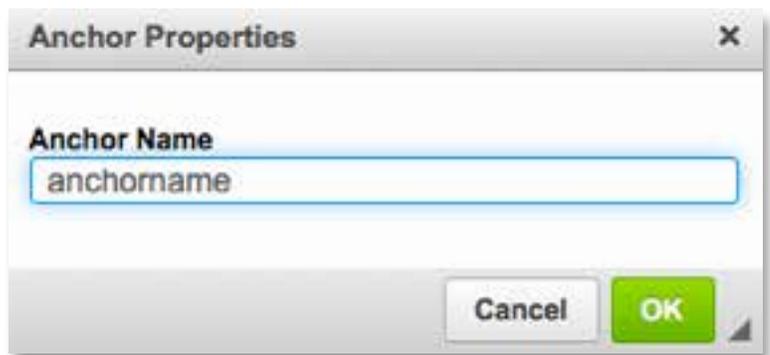


Now that you have the anchor name in place, you will need to link it.



Select the word you would like to anchor, and select the "flag" button. A box will pop up, where can enter in your anchor name. Once you do, click ok.

You should now have a link that anchors somewhere else in your site.

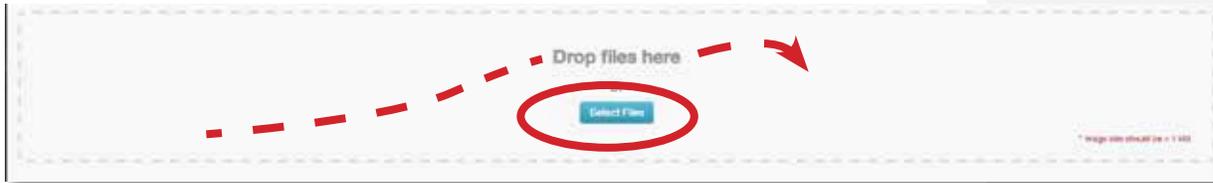
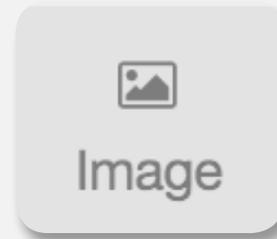


### Adding an Image in the Editor

Drag the “image” button into the editor to add a picture.

At this point, you can either drag an image onto the open box, or you can Select Files from your computer to be uploaded.

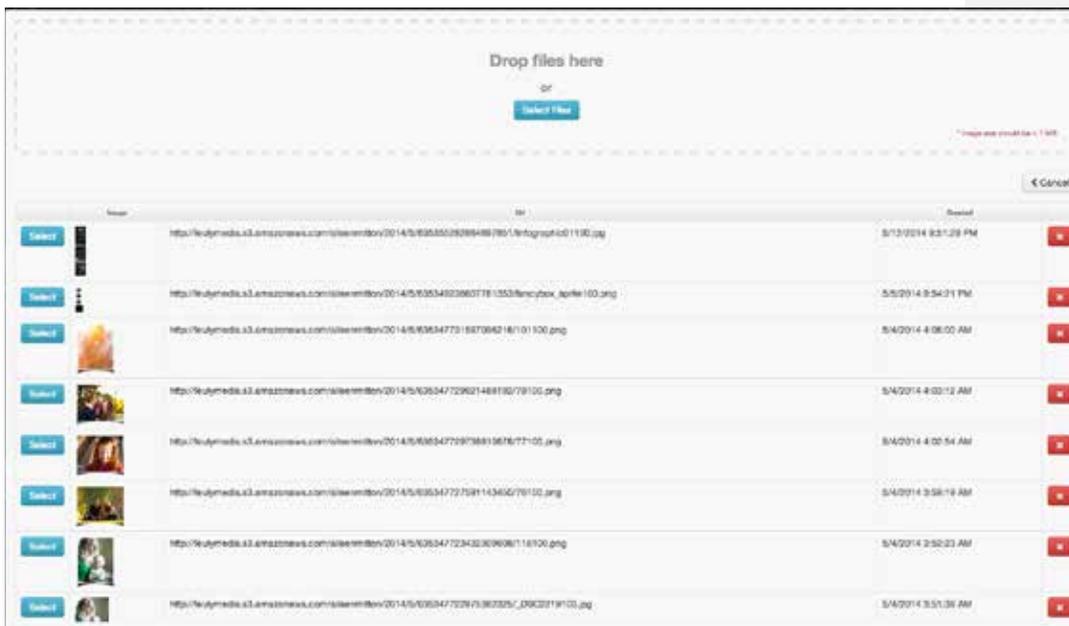
Once the pictures are uploaded into your image library, you’ll



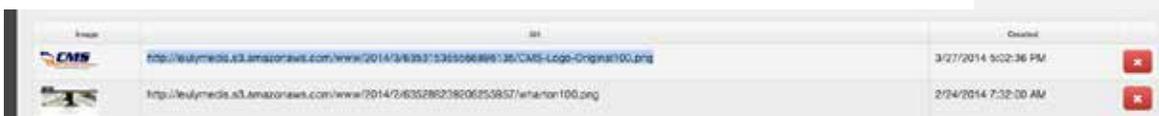
retain them unless you choose to delete them.

If you want to delete one of the pictures in the image library, click on the “delete” button on that picture.

If you want to use one of the images, double click on the image. Or hit the “select” button. It will drop it to the bottom of the Editor page.



If you are adding an image somewhere in one of your LAYOUTS, select the image URL, by highlighting the link next to the image in your image library. That code may be used to source your image from within your layout.

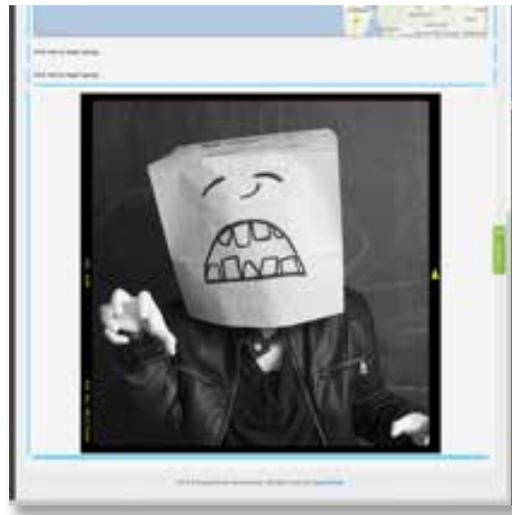


Adding Images



To MOVE an image around the active page within the Editor, click on the box and drag the box around to the desired area.

Or you can select the blue arrows icons to move the box right or left or for up or down



The image below shows how dragging the image in relation to other images will create the blue placement lines



To ADJUST SIZE, press these expand and compress buttons and move your mouse while holding down on the button. It will left align to fit within the space defined.

Example of expanding and contracting images

If you don't like the image you uploaded and want to delete it, just



press the "discard" button in the top left corner of the image.

If you'd like to change information on an image, you just double click on the item, and this box will pop up:

**Edit Image**



[Click Image to change.](#)

Title

Alt

Stylesheet Classes

Clickthrough URL

New Window

If you would like to add a click through URL link a title, you can enter it here. Hit "save"

Be sure to hit the "publish" button when you want to save the entire page.

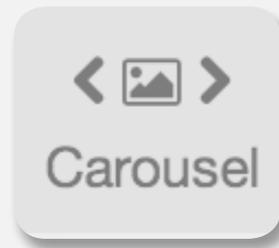




### Adding a Carousel

Drag the button into the editor to add a carousel.

This box will pop up, once you click on the CAROUSEL button.



#### Edit Carousel

**Background Color**

  
**Full Width**

You can drag the fields to arrange the order on the Carousel.

**+ Add Image**

**Cancel Clear Remove Save**

To add an image, click on the “Add Image” button:  
A blue box will pop up with an image box.

Image 1

NO IMAGE

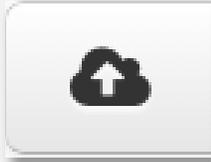
Name

Description

Save

*Adding a Carousel*





Double click on the blue image box, and your image settings will be available.

To upload the image to the carousel, select the “add image” icon. Fill in the appropriate information, then hit the “save” icon.

To rearrange and adjust order, you can drag and drop the image order, by clicking on a blue image box and moving it around.

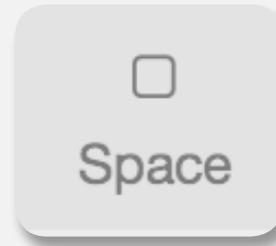
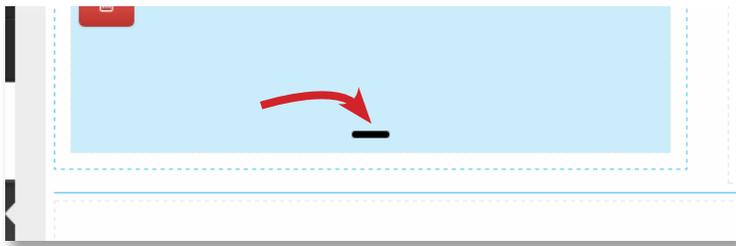
## Adding a Space

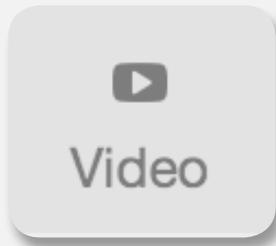
Drag a “space” square into the editor insert a space.



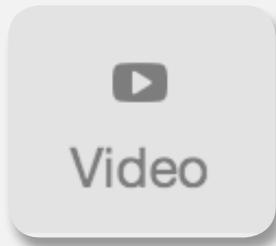
You can add the space anywhere by dragging the item around (clicking on the item and moving your mouse around).

You can click on the black bars by dragging them in and out to create a larger or smaller space.



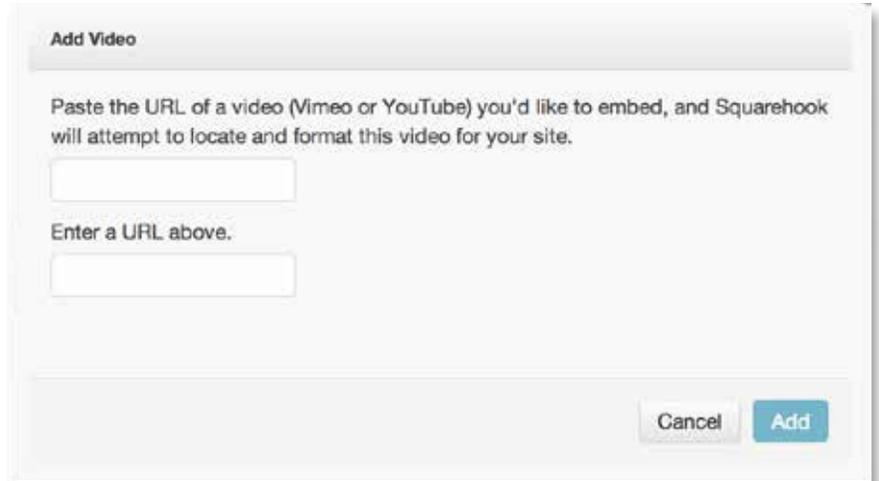


### Adding Video

Drag on the  button into the editor to add video.

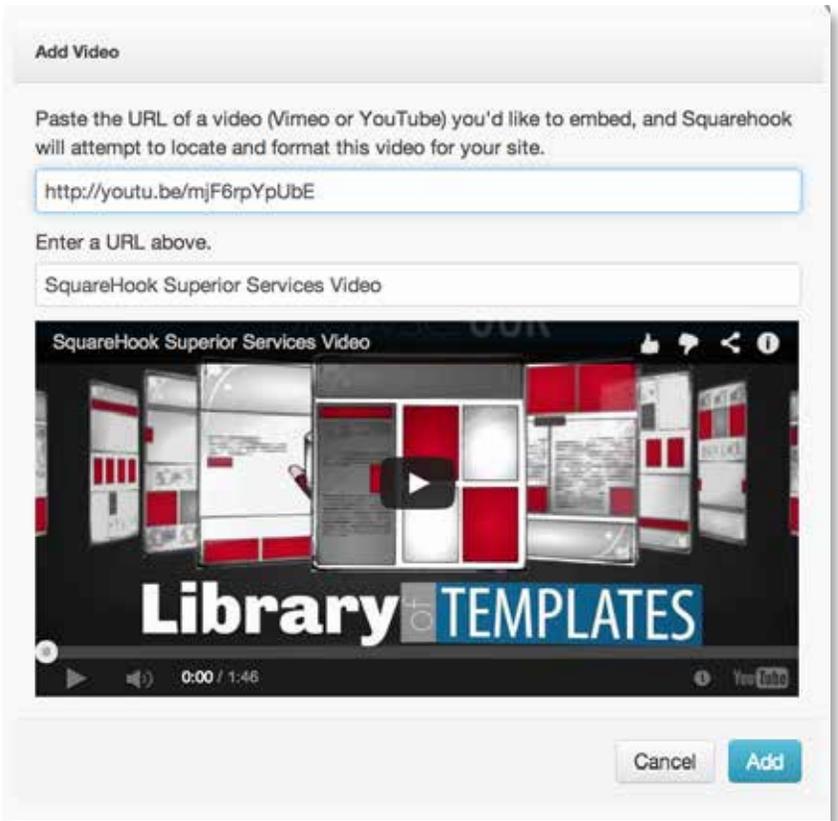
This box will pop up, once you click on the VIDEO button.

Paste the URL into a blank box, and the image of your video will appear.

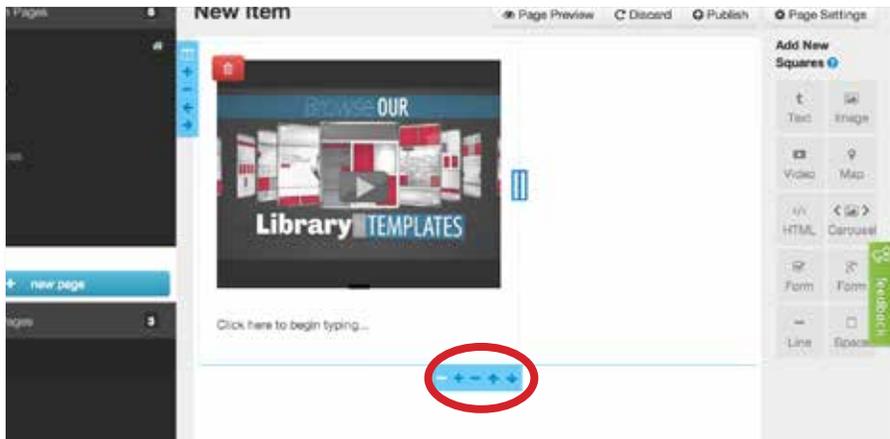


If the video you uploaded is the correct video, click on the "add" button.

To MOVE a video around the Editor, grab the handle associated with the box and drag the video around to the desired area. The



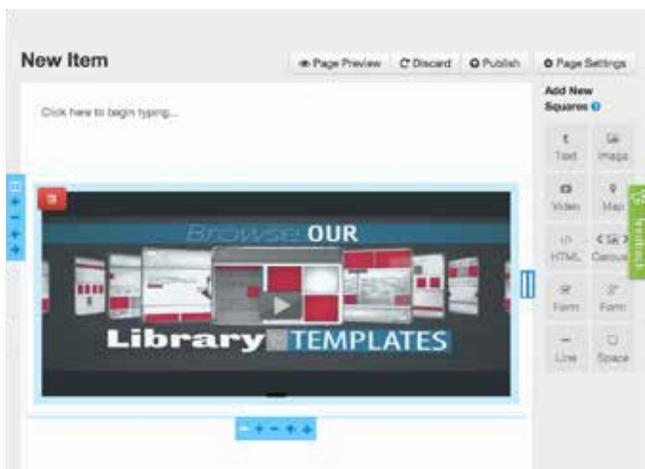
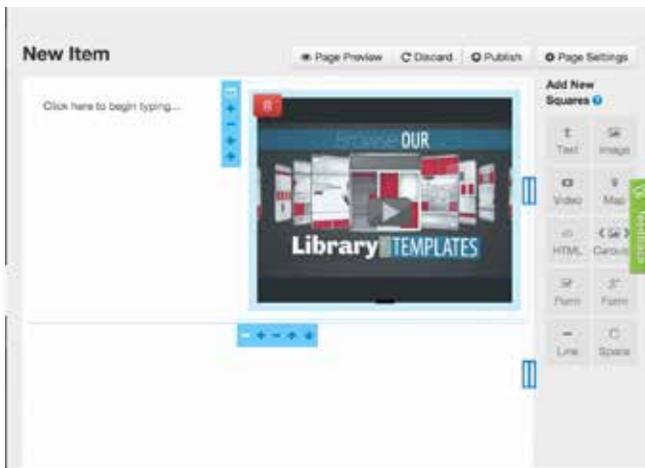
blue lines surround the areas around other text boxes and images indicate where the video can be placed (above, below, right, left)



To MOVE a video around can select icons to move the box right or left or for up or down.

The image below shows how dragging the image in relation to other elements.

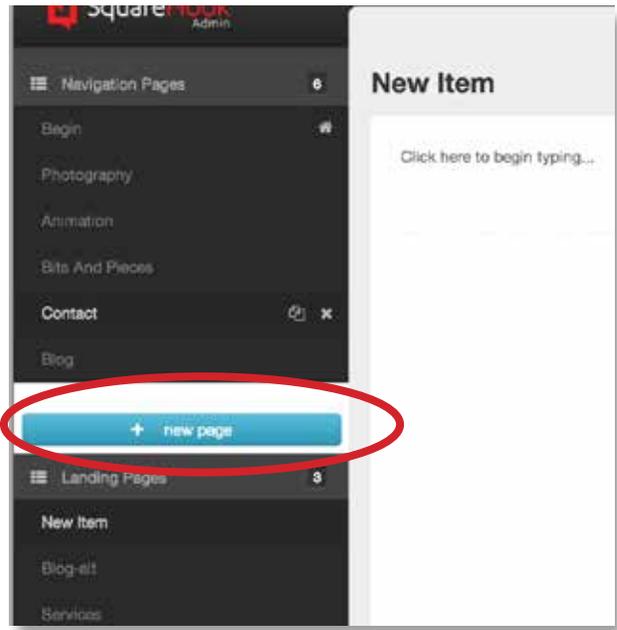
Be sure to hit the “publish” button regularly, when you want to save.



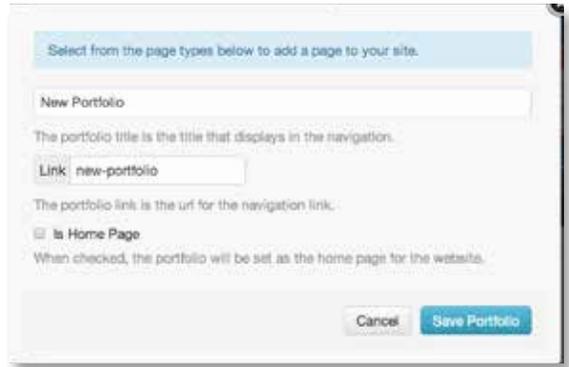


*Adding A Portfolio Page*

To add a portfolio page click on the new page button on the menu on the left of the User Interface. Select the portfolio button.

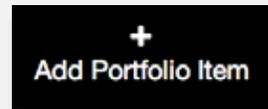


Name your portfolio, then hit "Save Portfolio".



## Adding Images to your Portfolio

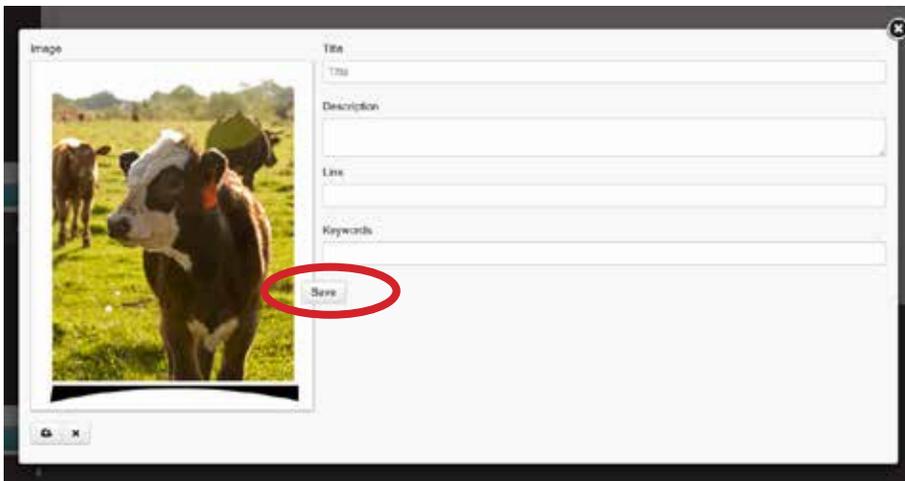
To add images to your portfolio click on “Add portfolio item”.



Your image manager will pop up. You can choose either to apply an existing image or you may upload a new image to apply.



A new box will appear with your image. Populate the fields with image title, description, any applicable links and keywords. When you're done. Hit "Save". Repeat the process for additional gallery images.



### *Editing a Gallery Portfolio*

To edit any of the existing images, just double click on the image:

You can change the tile, or edit the descriptions. Here you can put in your keywords to put the image into categories.



To add another portfolio image, select the “add portfolio item” button.

You will then be able to add an image, or access an image from your library.

Once you’ve put in the image information, be sure to hit the “Save” button.

Feel free to rearrange the images by dragging the images into the place you’d prefer.



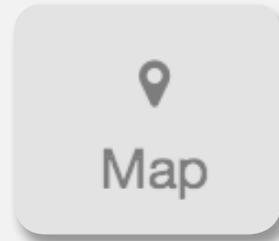
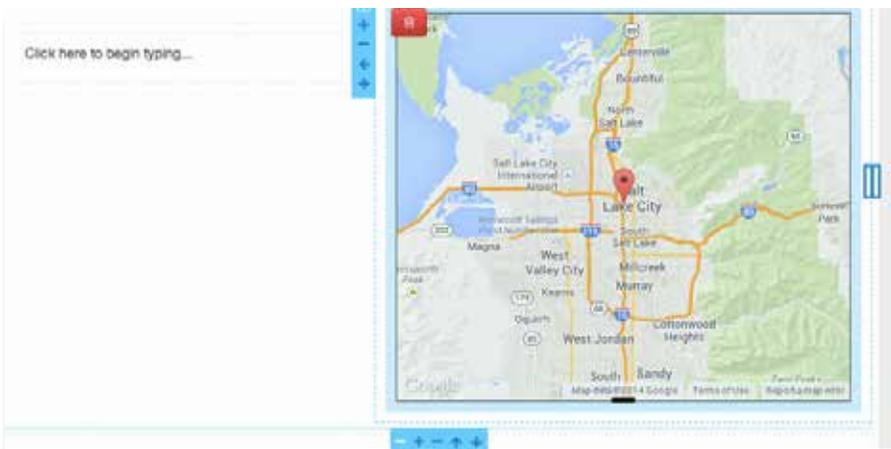
### Adding a Map

Drag the map square to add a map.

This box will pop up, once you click on the MAP button.

Enter in the address you need to create the map. Once you have entered in all of the information, hit the “add” button.

To MOVE the map around the Editor, click the button associated with the picture and drag the map around to the desired area. The blue lines surround the areas around other text boxes and images indicate where the map can be placed (above, below, right, left)



**Add a Map**

 Publish

Or you can select the blue arrow icons to move the box right or left or up or down.

Be sure to hit the Publish button to save new additions.

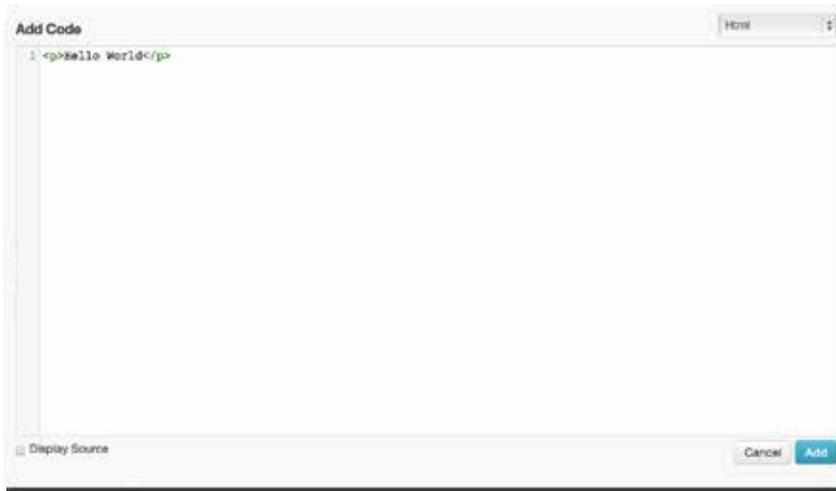
### Adding HTML

Drag the button into the editor to add HTML.

Once you click on the HTML button, an image would pop up (See below).

Enter in the HTML you want to add to the layout. Once you have entered in all of the information, hit the “add” button.

Be sure to hit the “publish” button if you want to save adjustments.





### Add a Form

Drag the “add form” button into the editor to insert a form. This box will pop up, once you click on the FORM button.

You can go in and adjust specific fields by clicking on that field and typing in the information.

A configuration dialog box for a new form. It has a title bar "Name" with a text input field containing "New Form". Below is a list of fields: "Name field 1", "Message field 1", and "Text field 1", each with a drag handle on the left and a close button on the right. Below the list is a "+ Add Field" button. At the bottom is a "Settings" section with tabs for "Transmission" and "General". The "Email" field is visible with the value "sales@squarehook.com". "Cancel" and "Save" buttons are at the bottom right.

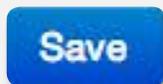
You can add additional fields by clicking on the ‘+ Add Field’ button

The field options will drop down, here are all of the options for a form box:



You can customize the settings by clicking on the Transmission or the General Tab.

Be sure to select the “save” button.

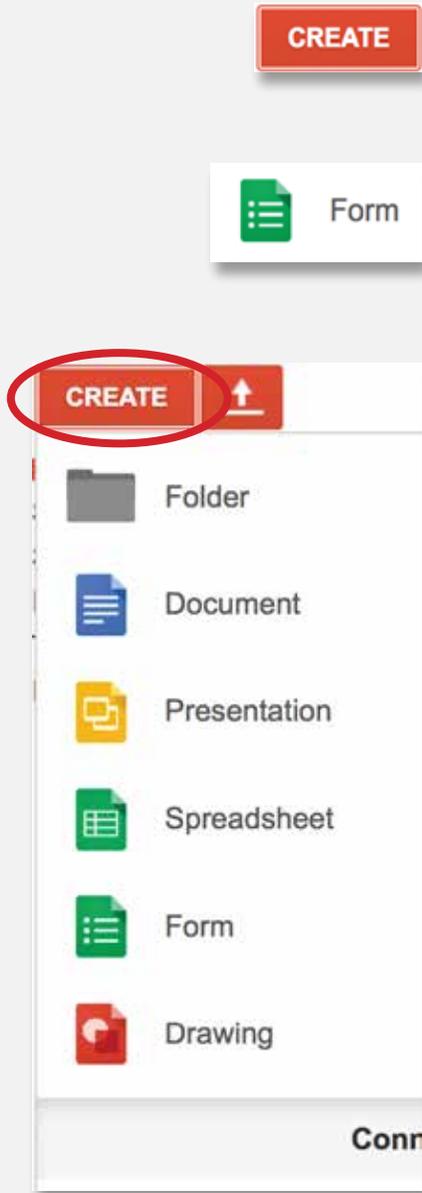


You can move the form around by dragging and dropping it around the page.

If you want to make changes to the form, you can double click on it, and the form will pull up for you to make adjustments.

The screenshot shows a 'Settings' dialog box with the 'Transmission' tab selected. The 'General' sub-tab is active. The 'Email' field contains the text 'sales@squarehook.com'. At the bottom right, there are 'Cancel' and 'Save' buttons.

The screenshot shows the 'Settings' dialog box with the 'General' sub-tab selected. The 'Transmission' tab is also visible. The 'Button Text' field contains 'Submit'. The 'Label Position' section has radio buttons for 'Left' and 'Top', with 'Top' selected. The 'Thank You Message' field contains the text 'Your message has been sent. We will contact you shortly.'. At the bottom right, there are 'Cancel' and 'Save' buttons.

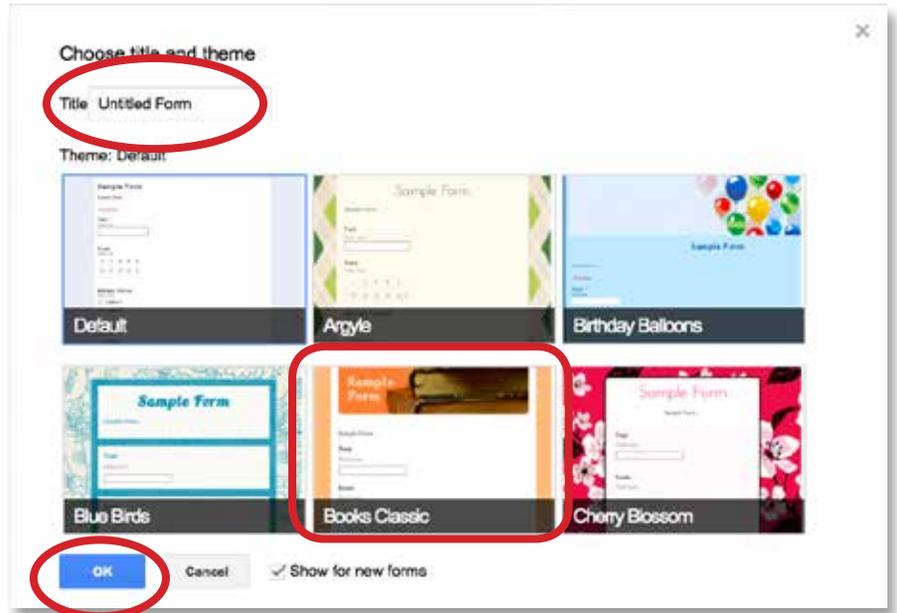


### Add a Google Form

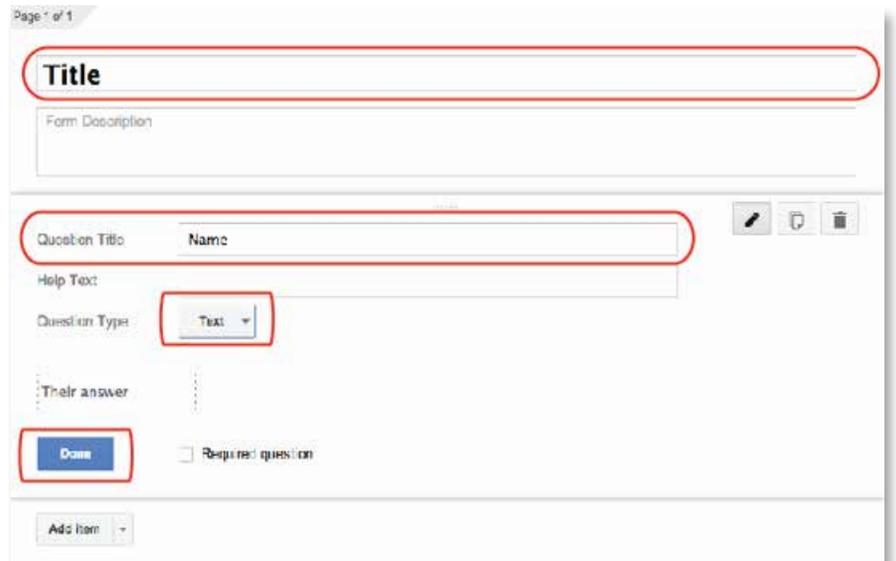
From within your Google drive:

Click on the "create" button, and click on the "form" button to begin a new form.

Enter in the TITLE of your form, and choose the layout you'd like, then hit ENTER



Begin filling in the Questions, including what TYPE of question, then hit DONE.



Continue to add questions until you are satisfied with your form.

Page 1 of 1

### Untitled form

Form Description

Question Title:

Question Type: Multiple choice  Go to page based on answer

Option 1

Click to add option [or Add "Other"](#)

Advanced settings

Required question

[Done](#)

[Add item](#)

Once you feel good about your form, hit the “send form” button.

Confirmation Page

Your response has been recorded.

Show link to submit another response

Publish and show a link to the results of this form to all respondents

Allow responders to edit responses after submitting

[Send form](#)



**Add a Form**

Copy the link to share the form

### Send form

Link to share

[Embed](#)

Share link via:   

Send form via email:

Looking to invite other editors to this form? [Add collaborators.](#)

[Done](#)



Return to the SquareHook Editor.

Drag the “Google Form” Square into the editor to add the form.

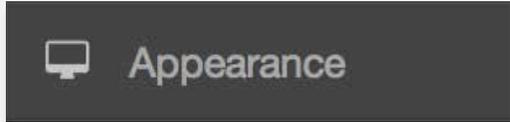
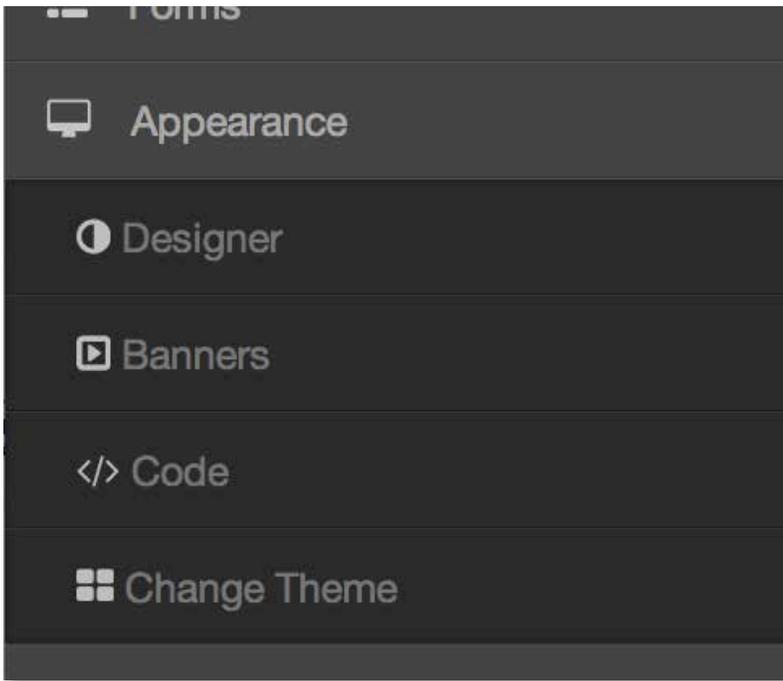
A white dialog box with a thin gray border and a subtle drop shadow. The title bar at the top reads 'Add Google Form'. Below the title bar, there is a paragraph of text: 'Paste the URL of google form you'd like to embed, and Squarehook will attempt to locate content at this URL and format it for your site.' Below this text is a white text input field with a thin gray border. Underneath the input field is the text 'Enter a URL above.' At the bottom right of the dialog box, there are two buttons: a light gray 'Cancel' button and a blue 'Add' button with white text.

Paste the link into the Google Form Square, then hit the “add” button.

Be sure to hit the “publish” button to save the recently added Google Form.

## Editor Sidebar

Click on the “appearance” button located on the left hand menu in the User Interface. There, you will be able to edit the look and feel of your website.



**Editor Sidebar**

### Designer

To edit the coloring, select the **Colors** button. There you can edit your color settings.

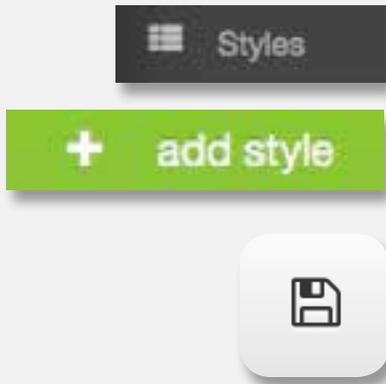
You can input your primary and secondary colors and alter other aspects of your site.

The image shows a screenshot of the 'Colors' settings panel in the Designer interface. At the top, there are two buttons: 'Revert' and 'Finished'. Below these is a dark header with the word 'Colors' in white. The panel is organized into several sections, each with a light gray header:

- General**: Contains two color selection fields. The first is labeled 'Primary' and the second is labeled 'Secondary'.
- Header**: Contains two color selection fields. The first is labeled 'Background' and the second is labeled 'Site Name'.
- Menu**: Contains four color selection fields. The first is labeled 'Background', the second 'Text', the third 'Hover Background', and the fourth 'Hover Text'.
- Footer**: Contains four color selection fields. The first is labeled 'Background', the second 'Text', the third 'Link', and the fourth 'Link Hover'.

Each color selection field consists of a small square with a checkerboard pattern and a text label to its right.



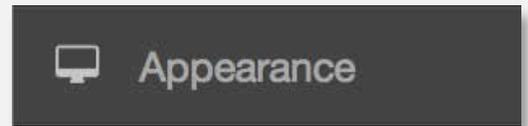
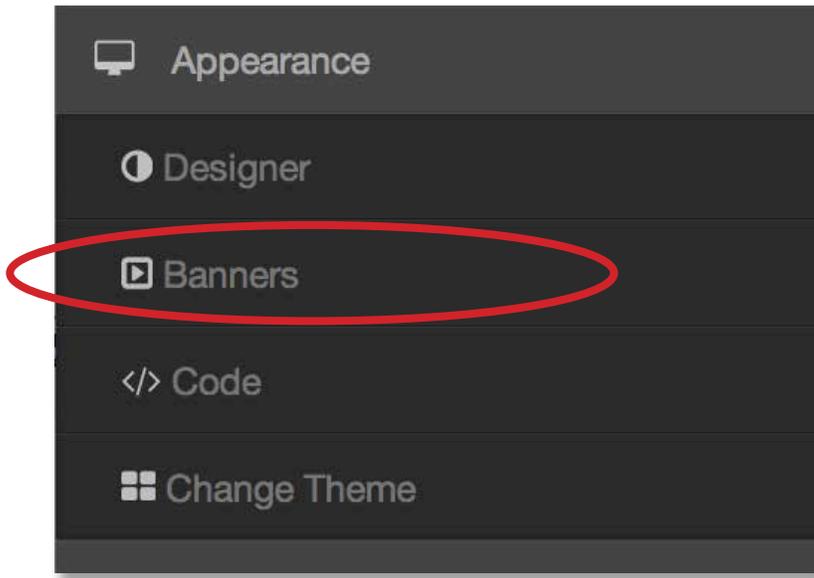


### *CSS Injection*

Click on the “styles” button to view the current CSS for your layout. You can hit the “add style” button if you want to add a new CSS page, or want to edit existing pages. You can edit those existing pages by just clicking on the page you’d like to add/subtract from. *Be sure to hit the “save” button in the top right corner, to save the changes you made.*

### Adding a Banner

To add a banner, select the Appearance button in the editor. Select the Banners button dropdown.



Select the +Add Banner button to begin adding scrolling banners.

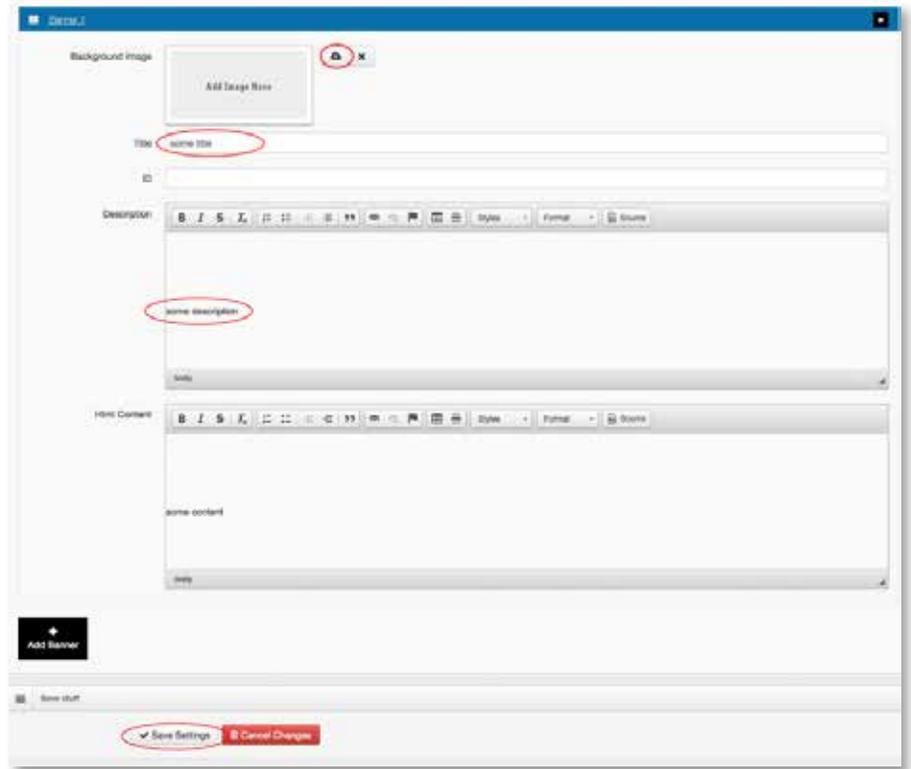


Under your banner, there will be a small cloud icon. Select it to upload an image to your banner.



***Adding a Banner***

Once you have added an image, be sure to fill in the appropriate information, including a title or description.



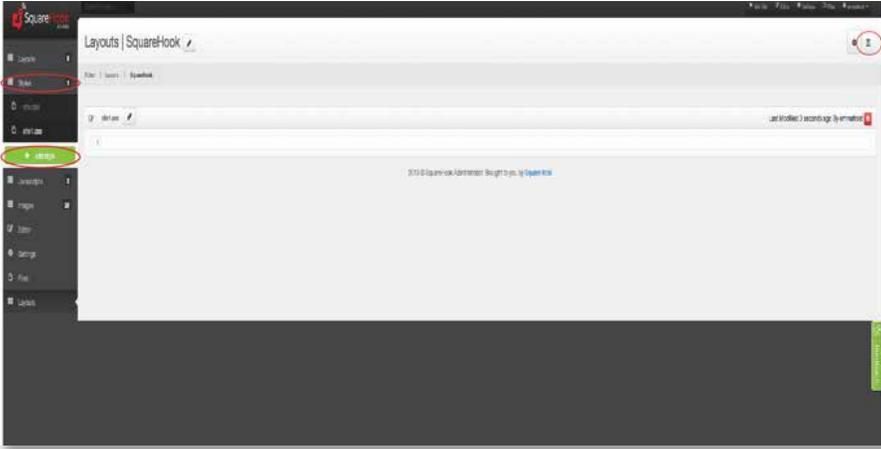
You also have the option to edit the HTML if you so choose.

Be sure to select the Save Settings to save your changes.

✓ Save Settings

### Javascripts

Click on the “javascripts” button to view the Javascripts existing in your layout. To add another page, you can hit the “add script” button. You can edit existing scripts, just by clicking on them and adding or subtracting content.



Be sure to hit the “save” button in the top right corner, to save the changes you made.





# Blogging

## Adding a Blog From an external source

Click on the “new page” button.

Select the “blog” button.

Enter in your blog title information here:

Hit the “**Save Blog**” button to save your settings.

Select from the page types below to add a page to your site.

The blog title is the title that displays in the navigation.

Link

The blog link is the url for the navigation link.

Is Home Page  
When checked, the blog will be set as the home page for the website.

SquareHook creates three options to integrate a blog into a website. Clients can embed an existing Blogger account, a Tumblr account, or clients can create a blog using our SquareHook blog tool. Clients can quickly and easily add and edit blog posts.



**Blogging**

▼ Blog Settings

Connect To

You may want to create posts using our platform or, if you already use popular blogging softwares, you may connect to them and import your posts here.

Posts Per Page   
Define how many posts you would like to see on a page.

Blog Columns   
If your layout's blog has columns as an option, you can specify how many columns you would like here.

Download

If you want to export your posts from this blog to somewhere else, click this button to download.

Note: If you are going to create a blog through the SquareHook tool, just select the “SquareHook” button, and hit “Save Blog”.

## Blog Settings

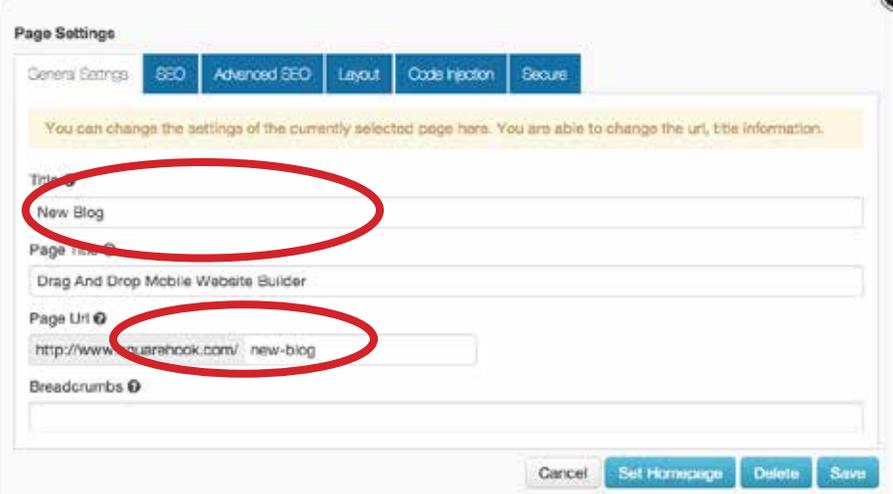
Save

### *Edit the Settings of a Specific Blog*

Click on the “blog settings” button. The image below will pop up:

Under the Title, type in the new title you would like.

Be sure to also adjust the URL to the new blog title (see image above)



**Page Settings**

General Settings | **SEO** | Advanced SEO | Layout | Code Injection | Secure

You can change the settings of the currently selected page here. You are able to change the url, title information.

**Title**  
New Blog

**Page Name**  
Drag And Drop Mobile Website Builder

**Page Url**  
http://www.squarehook.com/new-blog

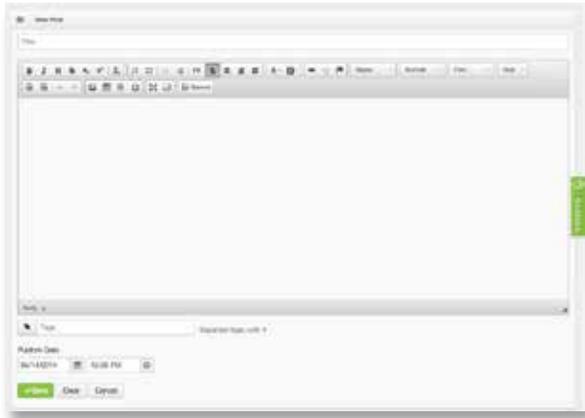
**Breadcrumbs**

Cancel | Set Homepage | Delete | Save

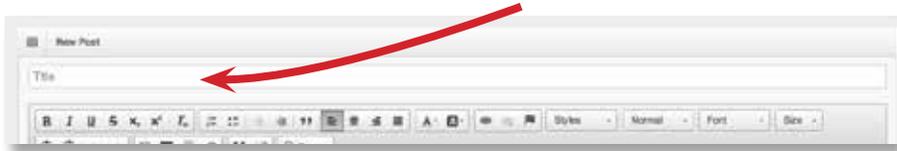
Hit the “save button.”

### Create a New Blog Post

To create a new blog post, hit the “add post” button. A posting page will pop up:

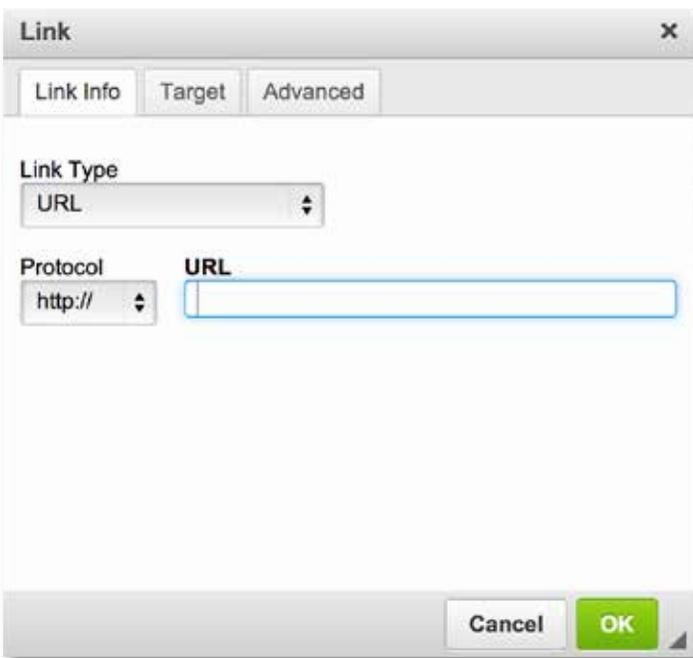


Enter in the Title of your post.



Begin typing your blog post. You can edit your text box similar to most other blog writing features or Word programs.

To reference a link somewhere in your article, highlight the words you want to link off to, and select the “link” button. A box will pop up where you can enter in the URL you want to link to. You have the option to have another window open. Once, you have entered in the URL, you can hit the “ok” button.



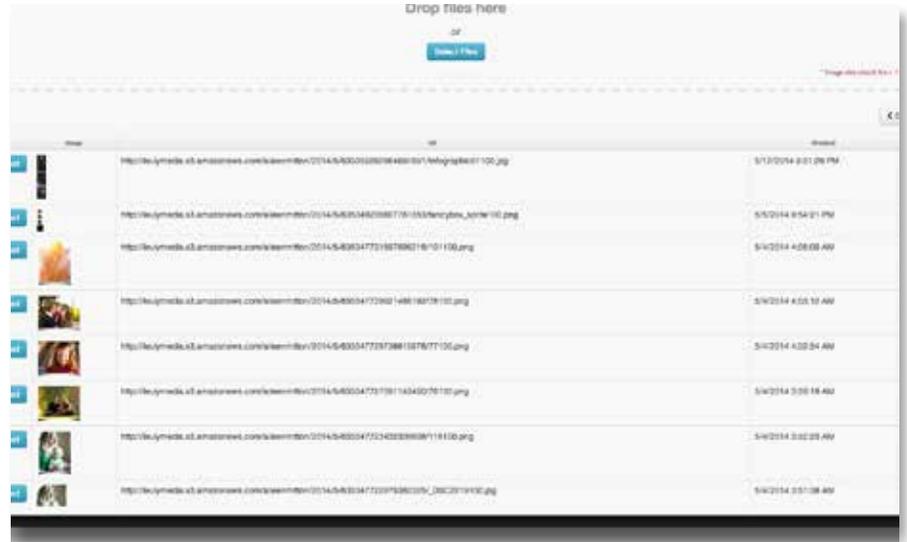


Select Files

To add an image, select the picture icon, an image library will pop up. You will have several options to add an image.

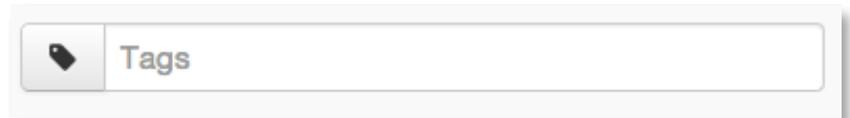
1. You can drag an image into the dotted box area
2. You can hit the "select files" button to retrieve an image from somewhere in your computer.
3. You can select an already downloaded image in your library.

Once the image is loaded, you just click on the image to drop it into your text box. You can adjust the image within your text box.



If you are unsure of any of the toolbox buttons in the blog feature, you can just hover your mouse over that button for a reference for what it can do.

To **add tags** to your post, move down to the "tags" area. Begin to type in the words you would like to be associated to the blog, with # to separate the words. (example: #webdesign #smile )



If you are satisfied with your post, you can select the "save" button to save it and make it live.

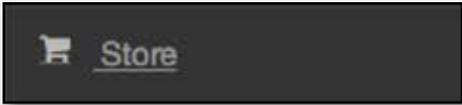
Save

To view your older posts, click on the “**+View more+**” link  
If you would like to go back to a previous blog post and edit



content, you can click on either the Edit button or the Delete button.

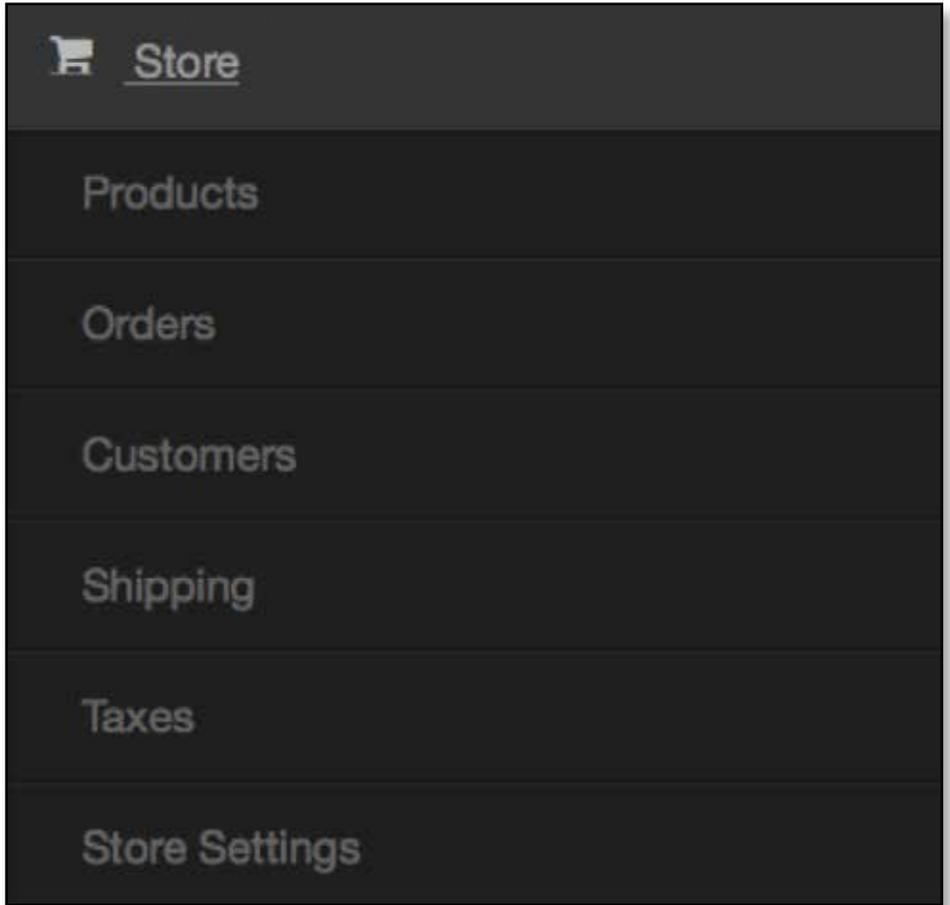




## Adding eCommerce

### *Getting Started*

Select the “store” button to begin creating your store.



Getting setup to receive payments.

Select the "store settings" button to get setup to receive payments.

In order to begin accepting payments for orders you need to enable one of the following options for your checkout process. If you do not yet have a merchant service account, we can help you register an account so you can start selling online. See our competitive rates below.

**Flat Rate 2.89%**

**Transaction \$0.30**

**Merchant Fee \$9.97 /mo**

**Register for Merchant Services**

You may register with Merchant Services directly on our website. We also offer the ability for users to choose from Authorize.net, and Stripe to process your transactions. To setup with Authorize.net, select the "Authorize.net" button.

A box will pop down for you to populate your information.


Authorize.net

Accept credit cards through the Authorize.net payment gateway. While in test mode, you can test the functionality of the payment gateway without any money changing hands. No transaction fees are charged on transactions completed in test mode. Learn more on [Authorize.net](#).

**Credit Card Rate:** Set by Authorize.net  
**Transaction Fee:** 30¢

test mode ?

API Login ID

Transaction Key

**Activate**

# Store Settings

*Adding E-Commerce*


Authorize.net

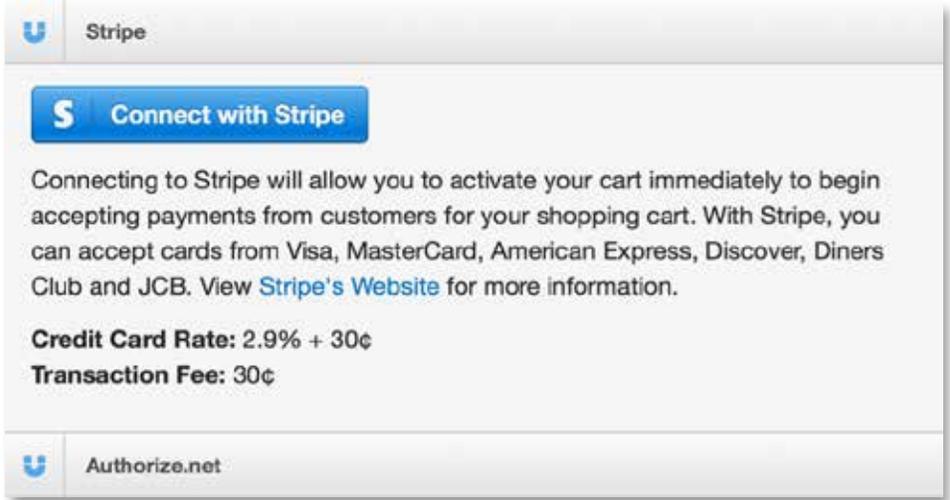
Activate



Select the “activate” button when you have filled out the proper information.

To setup with Stripe, select the “stripe” button.

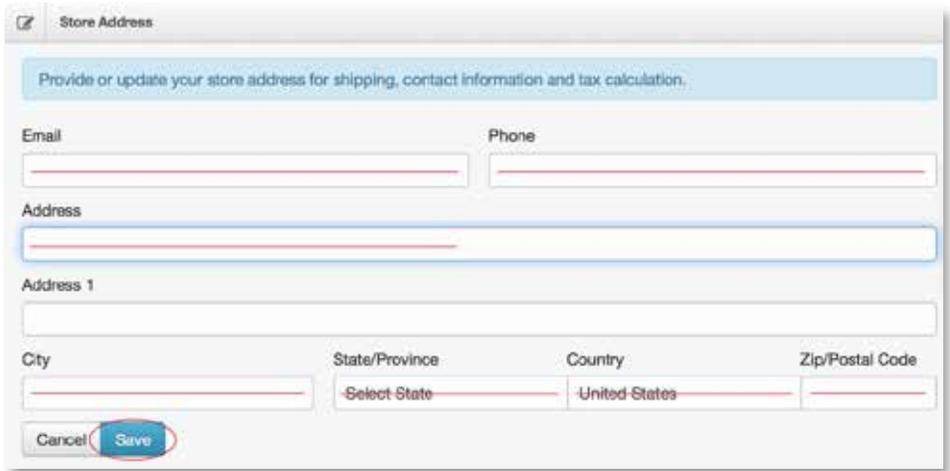
A box will popdown that has a link will redirect you to setup your information with Stripe.



Connect with Stripe

Select the “connect with stripe” button to be redirected.

To update the store address information, fill out your address information.



Save

Be sure to hit SAVE.

To Add Policies you can add them under the store settings.

**Policies on Privacy, TOS, and Refunds**

Use this area to direct users to your policy pages or with policy content provided in the fields below.

Privacy Policy - Paste your policy here

Alternatively, provide a URL

Terms of Service - Paste your TOS here

Alternatively, provide a URL

Refund Policy - Paste your policy here

Alternatively, provide a URL

Save Changes

When you are done, be sure to hit SAVE CHANGES.

**Product Types**

Add/Remove product types from your store.

Type

Add New Type

add

You can add Product Types under this section.

Type in the product you'd like to include, and select the "add" button.

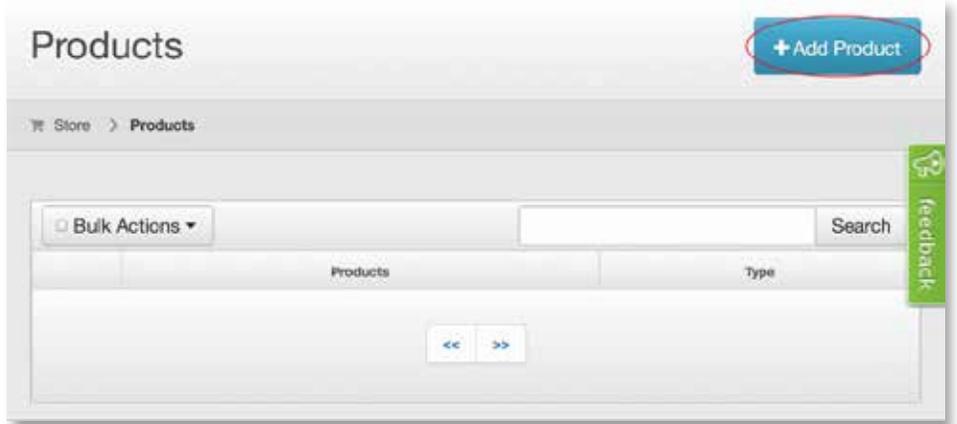


# Products

+ Add Product

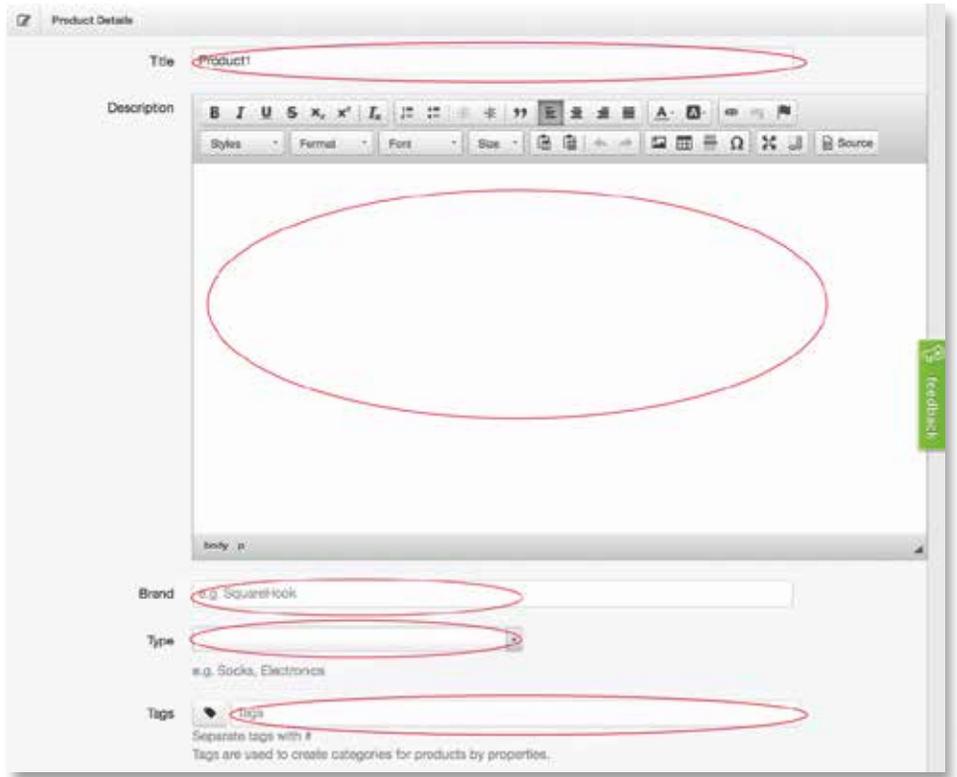
## Products

To begin adding products to your store, select the “products” button.



You will be brought to the products page. You may begin adding your store items, by selecting the “add product” button

Under the Product Details section you can add a Title, Description, Brand, Type, and Tags (for SEO, and search purposes)



Under the Pricing & Variations section, you can enter in specifics about the product, including price, discount, SKU number, weight, and/or product options.

**Pricing & Variations**

Price

Discount

SKU

Charge Tax

Weight

**Product Options**  This product has different options

Option	Values
<input type="text" value="Color"/>	<input type="text" value="e.g. #xs #s #m #l #xl"/>

Select Options

- Color
- Style
- Sizes
- Actions
- Create New

Separate Options with a #

**+ Add Option**

You can unselect the Charge Tax button, or the Product Options if there aren't any.

To ADD AN IMAGE, just select the "add image" button.

**Images**

Upload images for this product.

**+ Add Image**

Feedback

Once you have selected the +Add Image button, your existing image library will pop up. Here you can select from an existing file from your library, drag and drop an image, or select from your computer. You can continue to add as many images as you'd like.

**Images**

Upload images for this product.

**+ Add Image**

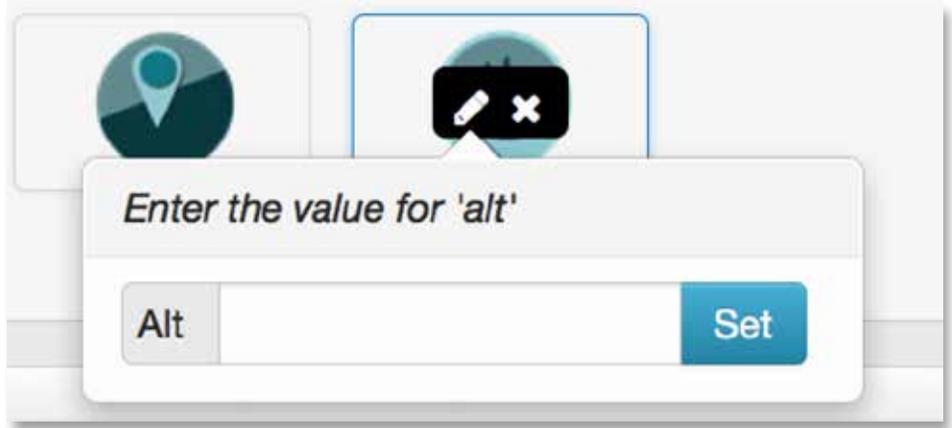
To rearrange the images, just drag one image along with your mouse, the surrounding images will move according to where you want to drop the image.

**+ Add Image**



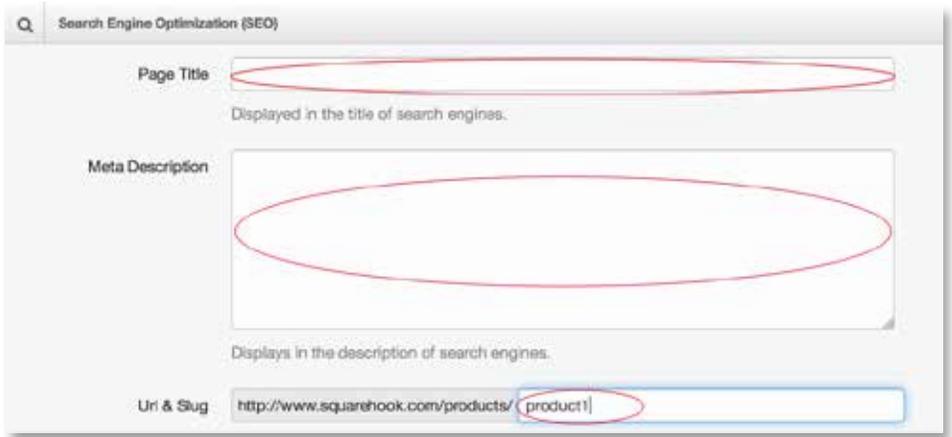
To edit an image, hover over the image. Two images will popup.

You can add an alternate value for the image by selecting the “edit” button



You can delete an image by selecting the “delete” button.

You can customize your SEO by filling in the Product Title, Meta Description, and URL & Slug:



Under the Visibility section, you can even choose when you want a product to be seen. You can select the date and time of when to make it visible and when you want to no longer show it. (this is a great option for doorbusters or seasonal products that have timely availabilities)

Visibility

Publish Date 06-02-2014 2:15 PM

Product End Date

Setting  Visible 2014-6-2 2:15 PM MST  Hidden

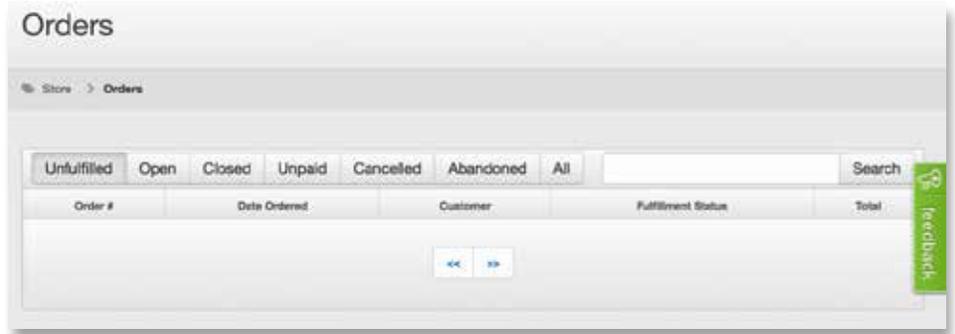
Be sure to select the “save” button to save your populated product information.



## Orders

### Orders

To view your orders, you would select the “order” button.



Your Orders page will show up with a number of tabs, including Unfulfilled, Open, Closed, Unpaid, Cancelled, Abandoned, and All.

Unfulfilled

*By selecting the “unfulfilled” button you can view the orders that are finalized and processed.*

Open

*By selecting the “open” button you can view the orders that are still open and need to be processed.*

Closed

*By selecting the “closed” button you can view orders that have been closed.*

Unpaid

*By selecting the “unpaid” button you can view the orders orders that have been paid.*

Cancelled

*By selecting the “cancelled” button you can view the orders that have been cancelled.*

Abandoned

*By selecting the Abandoned button you can view the orders that have been left in the cart but haven’t been submitted.*

All

*If you select the “all” button you can view all the outstanding orders. An order will be pending and unfulfilled until you approve the order. Then, will the order be submitted for processing.*

Order #

Select the "Order #" to view the order in full.

Fulfillment Status
Unfulfilled
Fulfilled
Unfulfilled

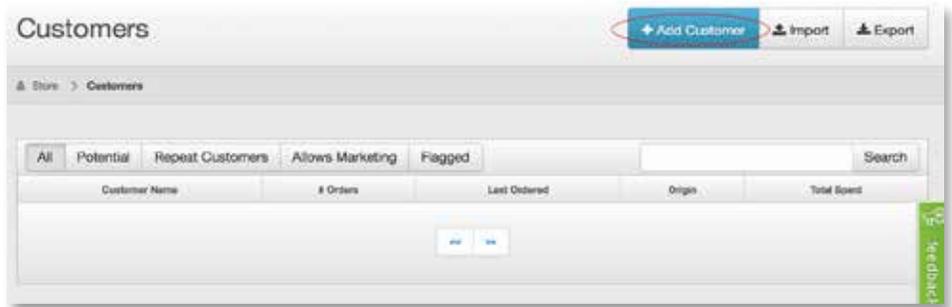
Customers

+ Add Customer

Add

## Customers

Select the “customers” button to view your customer list.



Select the “add customer” button to add a new customer.

A screenshot of the 'Add Customer' form. It is divided into two main sections: 'Customer Information' and 'Address Information'. The 'Customer Information' section includes text input fields for 'first name', 'last name', 'email', 'company', and 'phone', each circled in red. There is also a checkbox for 'Allows Marketing'. The 'Address Information' section includes text input fields for 'Address' and 'Address 2', and dropdown menus for 'City', 'Postal / Zip Code', 'Country', and 'State / Province', all circled in red. At the bottom right, there are 'Cancel' and 'Add' buttons.

A box will pop up for you to populate information about customers. Be sure to hit the “add” button to store the customer’s contact information.

You can import existing names from an excel spreadsheet by selecting the “import” button.

Import

A popup will appear where you can select the file from your computer

## Upload Customers CSV File

CSV files are a typical file format downloadable from other platforms. These files can be opened and edited in Excel. In order to import your customers, we need to make sure the format of your file is compatible for import. [Click here for more details.](#)

Select File to Import

No file selected.

Once you have attached your file, be sure to select the “import” button.

You can export your customer list by selecting the “export” button.

## Download Customers CSV File

Select the category of customers you would like to download before proceeding.

All  Repeat  Potential  Allows Marketing  Flagged

You can select from a number of options that allow you to export. Be sure to hit the “download” button.



Shipping

Add Rate

Edit

Save

Save

### Shipping

To update your shipping information, select the “shipping” button. To adjust your Shipping Rates, select the “add rate” button.

The screenshot shows a 'Shipping rates' management page. At the top, there is a tab labeled 'Shipping rates' and a button 'Add a shipping Country'. Below this is a blue instruction box: 'Add shipping rates to parts of your country, the rest of the world or by specific country.' The main section is titled 'United States' and contains two buttons: 'Add Rate' (circled in red) and 'Remove Country'. Below these is a table with columns: 'Rate Name', 'Criteria', and 'Shipping'. The table has one row with 'Standard' as the rate name, '\$0.00 - \$1,000.00' as criteria, and '\$5' as the shipping rate. An 'Edit' button (circled in red) is located to the left of the 'Standard' row, and a 'Delete' button is to the right. A 'feedback' button is visible on the right side of the interface.

Select the “edit” button to make changes to your shipping criteria. Here you can customize your shipping rate, based on price or weight and the price. Be sure to hit “save” button.

### Edit Shipping

Rate name

Standard

- Based on Price
- Based on Weight

Range

0.00

1,000.00

\$

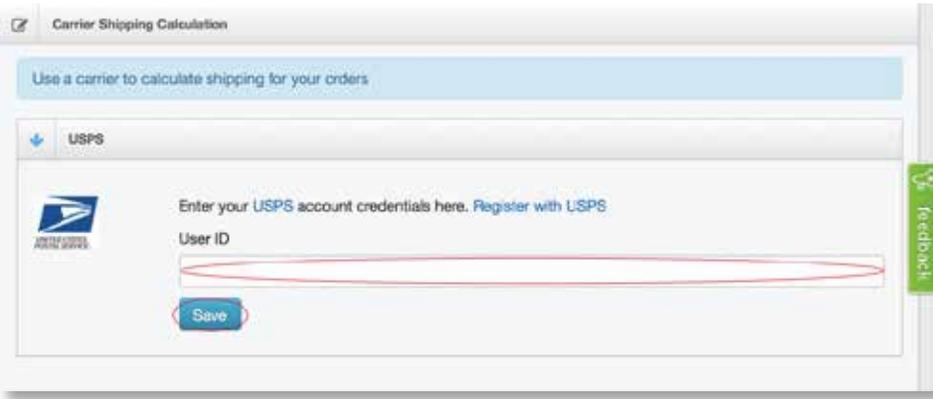
Price

\$ 5

Cancel

Save

To edit Carrier Shipping Calculation, enter in your User ID and hit the “save” button. You can also Register with USPS to set up a web tools account.



Carrier Shipping Calculation

Use a carrier to calculate shipping for your orders

USPS

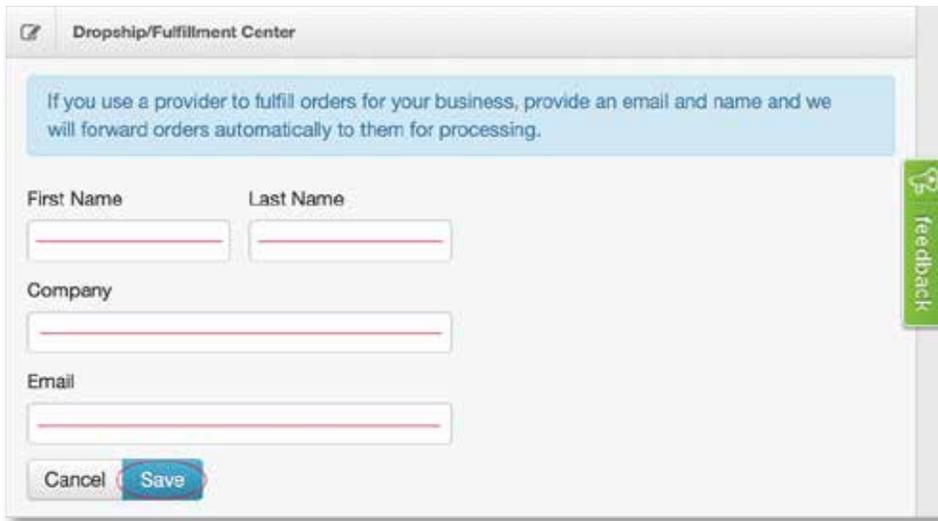
Enter your USPS account credentials here. [Register with USPS](#)

User ID

Save

Feedback

If you use a provider to fulfill your orders, provide the contact information under the Dropship/Fulfillment Center section. Once you select the “save” button, and SquareHook will forward order to them to be processed.



Dropship/Fulfillment Center

If you use a provider to fulfill orders for your business, provide an email and name and we will forward orders automatically to them for processing.

First Name

Last Name

Company

Email

Cancel Save

Feedback



**Adding E-Commerce**

# Taxes



Save

## Taxes

To edit the Taxes settings, select the “taxes” button.

Store > taxes

Add Domestic Sales Tax Rates

Domestic tax rates apply to orders processed within your country of residence. Note: You are required to charge state, county, and municipal taxes for regions your business has a physical location in. You can set the rate here and we will determine the calculation for you on your orders.

Country/State/Postal Code	Tax Rate	Apply Tax to Shipping/Handling	Status
---------------------------	----------	--------------------------------	--------

Add International Sales Tax Rates

International tax rates apply to orders processed outside your country of residence.

Country/State/Postal Code	Tax Rate	Apply Tax to Shipping/Handling	Status
---------------------------	----------	--------------------------------	--------

Select the “add” button to add a tax rate.

Add Domestic Sales Tax Rates

Domestic tax rates apply to orders processed within your country of residence. Note: You are required to charge state, county, and municipal taxes for regions your business has a physical location in. You can set the rate here and we will determine the calculation for you on your orders.

Country/State/Postal Code	Tax Rate	Apply Tax to Shipping/Handling	Status
---------------------------	----------	--------------------------------	--------

Select the state from the dropdown or add the zip code and fill in the tax rate. Be sure to hit the “save” button.

You can also add international rates by selecting the “add” button.



### Add Tax

Country:

State / Province:

Postal / Zip Code:

Tax Rate:  %

Apply rate to shipping and handling

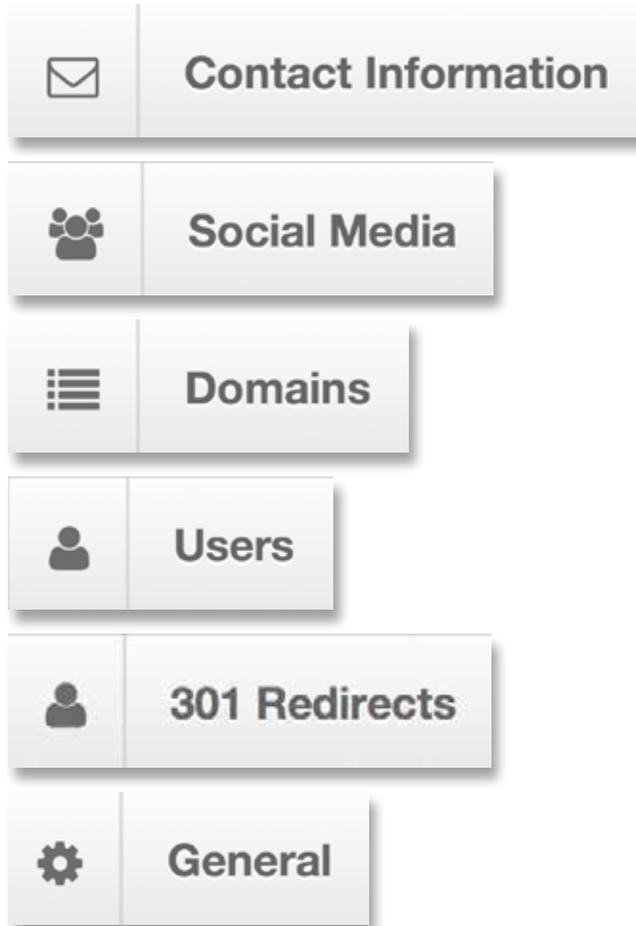
Be sure to hit the “save” button.



## Website Settings

## Website Settings

Select the WEBSITE SETTINGS button in the top right corner of your screen



Your settings will be divided into groups: General, Contact Information, Social Media, Domains, Users, and 301 Redirects.

## General Settings

Under the GENERAL settings you can input basic information about you. You can add/edit your website title, add a tagline, a description, upload a logo and favicon, and you can view available space and pages used.

General

These settings are general settings about your site, who you are, and information about the status of your website. If you want to changes these settings, make sure to hit the save button at the bottom.

Title   
This field is typically your business name or the name that represents your website.

Tag Line   
The site tag could be your slogan.

Description

Logo

Favicon

Storage

Images: 7.44 KB   Files: 0.00 B   Content: 54.19 KB

Pages

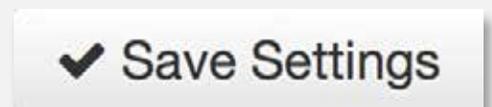
Images: 6

To upload a logo or favicon under the general settings, select the cloud icon right of the logo/favicon.

It will automatically allow you to search on your computer for the file of your choice. Hit open to upload the image to the tool.

If you are unhappy with you logo, and would like to replace it, you can select the remove button.

Be sure to hit the SAVE SETTINGS button to save your changes.



## Contact Information

### Contact Information

The CONTACT INFORMATION section allows you to add a specified contact email, phone number, and address. You aren't required to add any of them, but it makes it easier for website visitors to find you if you do. Depending on the web template you choose, the contact information may populate in the top right corner, the middle top, or in the footer.

Contact Information

Use this section to add contact information about your website. We will use this data in the layout or with your SEO. If you want to change these settings, make sure to hit the save button at the bottom.

Contact Email: sales@squarehook.com

Phone: 801-386-9828

Address: 423 W 800 S, Suite A301

Salt Lake City, UT

Country:

Map

Save Settings

Once you have added the contact information of your liking, be sure to hit the SAVE SETTINGS Button.

✓ Save Settings

### Social Media

If you have social media, and want them to be linked off your website, add the appropriate addresses/account information for your template to populate the appropriate social media icons. Depending on the template you choose, the social media icons may be at the top or bottom of your website.



Google Analytics





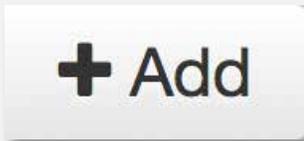






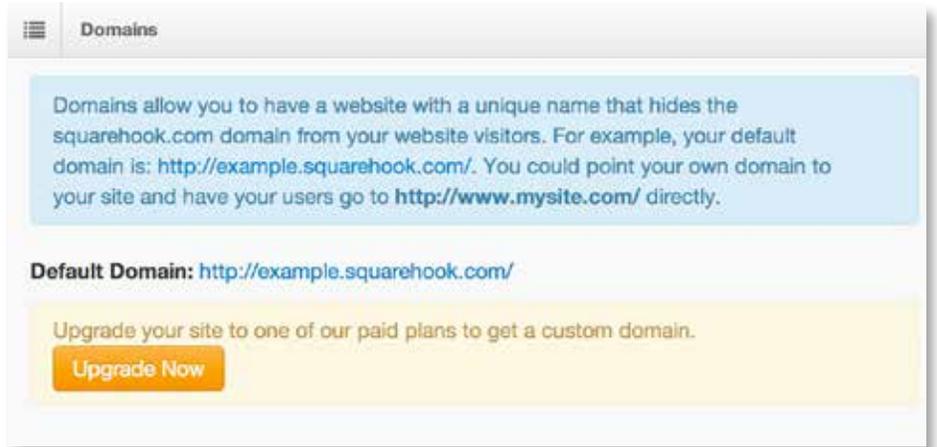
Be sure to hit SAVE SETTINGS to save the changes you've made.





## Domains

If you are staying with our free website, you will not have the option to add additional domains. You will stay with your default domain: `example.squarehook.com`.



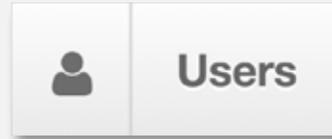
If you would like to upgrade your account you can select the Upgrade Now to be able to add your domains.

If you have updated your subscription plan, you can add as many domains as you'd like to the Domains section. Just type in the URL link, and select the +ADD button to add it to your domain list.



### Users

You can add additional users to your account if you want. Enter in the email and select the +ADD button.

 **301 Redirects**

**+ Add**

*301 Redirects*

If you have transferred your site from another website application, or if you want to redirect users from an old page to a new page, you can use this section to add permanent redirects.

 **301 Redirects**

If you transferred your site from another application here or want to redirect users from an old page to a new page, use this section to add permanent redirects.

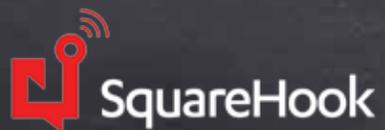
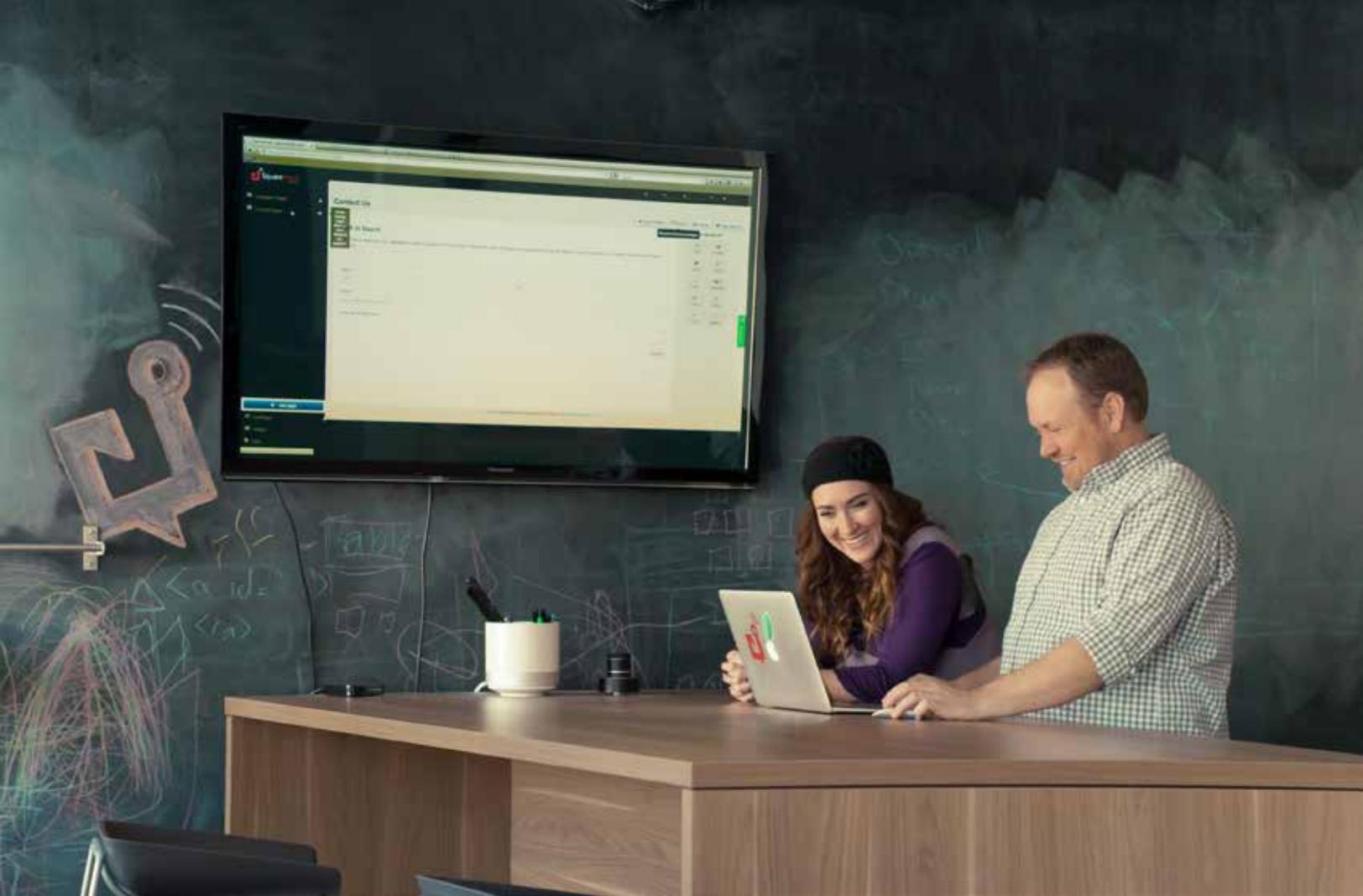
From	To	Opts
<input type="text" value="Old Url"/>	<input type="text" value="New Url"/>	<input type="button" value="+ Add"/>

Enter in your Old URL and New URL and be sure to select the +ADD button.



# Notes

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## Questions?

We are available by email: [support@squarehook.com](mailto:support@squarehook.com)

Telephone: 801-386-9828

Chat on our website [www.squarehook.com](http://www.squarehook.com)



***Getting started with the SquareHook CMS***

v1.3

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