Kentico CMS Hands on Lab

Kentico CMS Version 7 Hands on Labs

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Hands on Lab 1:
Kentico Enterprise Marketing Solution: Campaigns

Lab Overview

System Requirements:

- Kentico CMS 7 Enterprise Marketing Solution installed with the Sample Corporate Site

Intended Lab Audience:

- Online Marketers
- CMS Designers

Lab Introduction

Executing successful campaigns is an essential part of any marketing organization. Campaigns are a way to engage and interact with your customers. They provide an ideal mechanism to generate sales leads and collect customer information. This set of exercises is intended to show the process of creating a document based campaign for the Services page that collects customer information using an online form. Then using the collected customer information we will then score the leads for later use by the sales department. In completing this set of labs you will perform the following tasks:

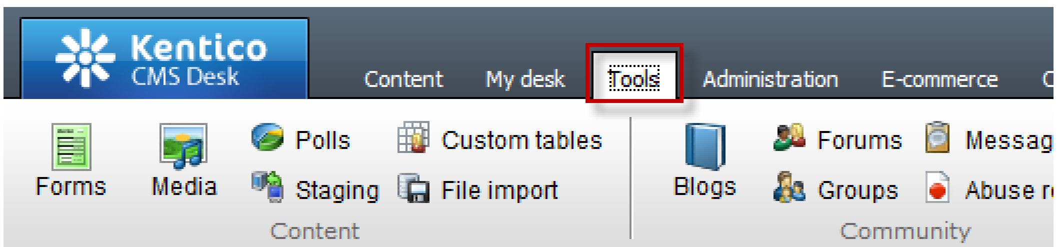
- Create an Online form for collecting customer information
- Create a squeeze page for collecting customer information
- Create a Services campaign
- Create conversions
- Create a lead score
- Optimize a campaign using A/B tests

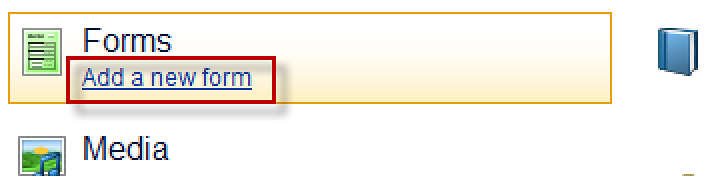
Lab 1-1: Creating the online form

Online forms are the easiest way to create a contact information form for the live site without having to write application code. Forms are built using a data driven interface and then inserted into the page using the Online form web part. In this lab we will create the contact information form and then insert it into the Services page, which is then used as the main campaign landing page.

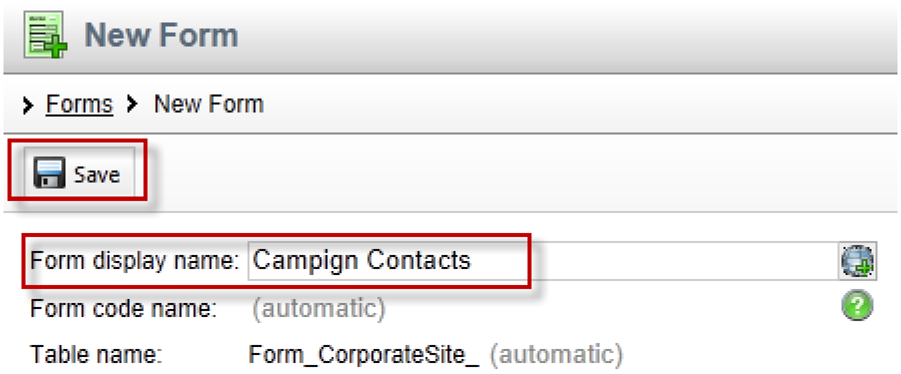
Lab 1-1: Creating an online form

1. Log into **CMS Desk** and select the **Tools** tab and then click the **Add a new form** link as shown in the following screenshot.





2. In the **New form** dialog in the **Form display name** field enter **Campaign Contacts** and then click the **Save** button as shown in the following screenshot.



3. In the **Campaign Contacts** form in the **General** tab update the following fields and then select **Save.**

Section	Field	Value
After the form is submitted	**Display text**	**We will contact you shortly**
	Submit button text	**Submit**

4. Select the **Fields** tab, click the **Add new attribute (+)** button, update the following fields and then click the **Save** button.

Section	Field	Value
Simple mode	**Column name**	**First_name**
Simple mode	**Field caption**	**First name**
Simple mode	**Field type**	**Textbox**
Simple mode	**Maximum length**	**20**

5. Select the **Add new attribute (+)** button, update the following fields and then click the **Save** button.

Section	Field	Value
Simple mode	**Column name**	**Last_name**
Simple mode	**Field caption**	**Last name**
Simple mode	**Field type**	**Textbox**
Simple mode	**Maximum length**	**30**

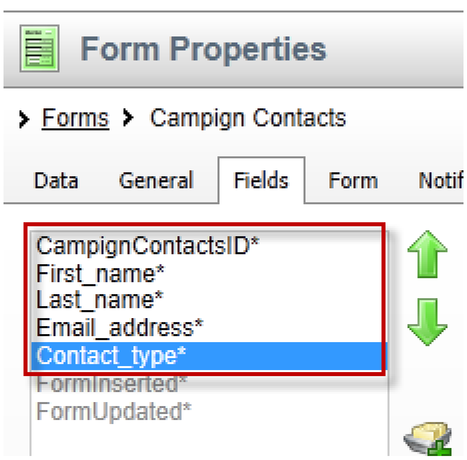
6. Select the **Add new attribute (+)** button, update the following fields, and then click the **Save** button.

Section	Field	Value
Simple mode	**Column name**	**Email_address**
Simple mode	**Field caption**	**Email**
Simple mode	**Field type**	**E-mail**

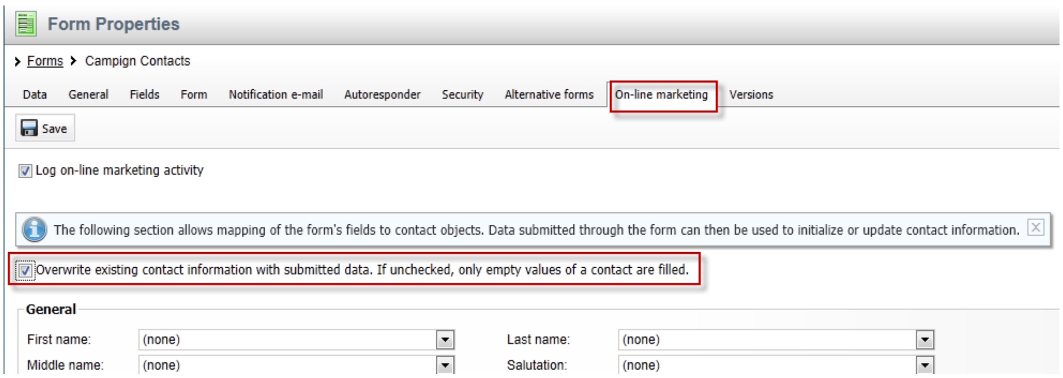
7. Select the **Add new attribute (+)** button, update the following fields, and the click the **Save** button.

Section	Field	Value
Simple mode	**Column name**	**Contact_type**
Simple mode	**Field caption**	**How can we help you?**
Simple mode	**Field type**	**Drop-down list**
Editing control settings	**Type**	**Options (one value; name pair on each line-example 1;Blue)**
Editing control settings	**Data source**	**Services;Services <CR> RFP; RFP**

8. In the **Fields** tab confirms the list of fields as shown in the following screenshot.



9. Select the **On-line marketing** tab, click the **Overwrite existing contact information with submitted data. If unchecked, only empty values of a contact are filled** check box and then click the **Save** button as shown in the following screenshot.

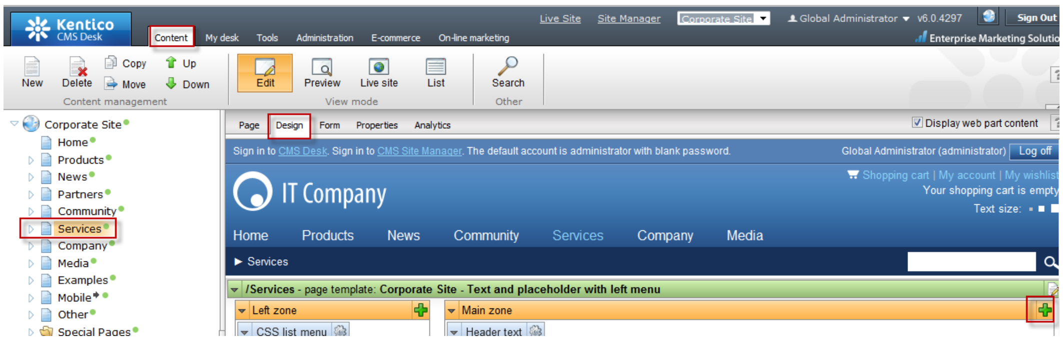


10. In the **On-line marketing** tab update the following fields and then click the **Save** button

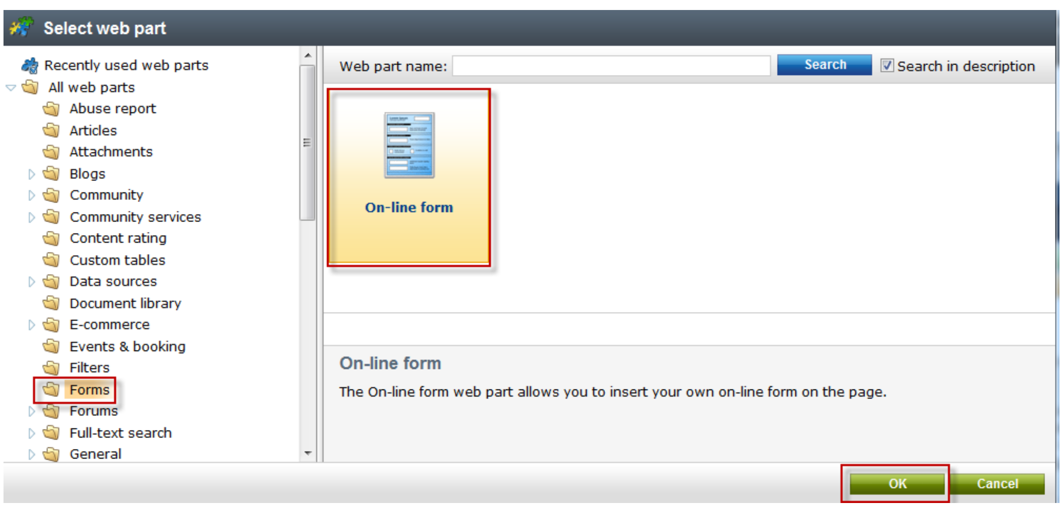
Section	Field	Value
General	First name	First_name
General	Last name	Last_name
Address	E-mail	Email_address

Lab 1-2: Inserting the online form

1. In CMS Desk select the **Content** tab, in the Content tree select the **Services** page, then the **Design** tab, and in the **Main zone** select the **Add web part icon (+)** as shown in the following screenshot.



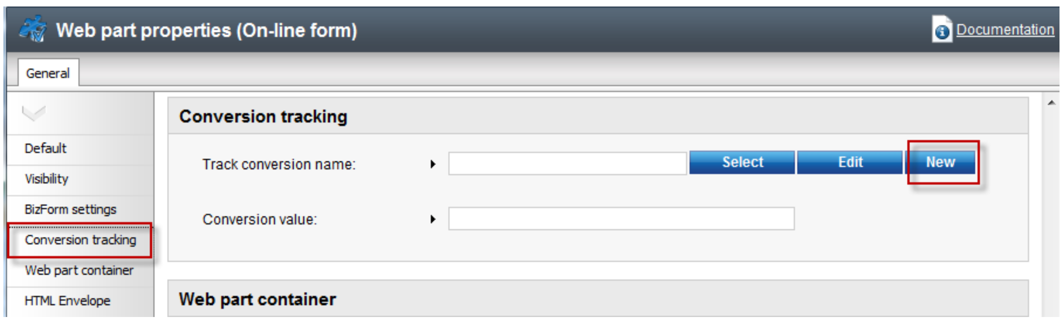
2. In the **Select web part** screen select the **Forms** folder, the **Online form** web part and then **Ok** as shown in the following screenshot.

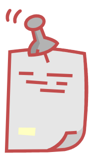


3. In the **Web part properties (On-line form)** update the following value.

Section	Field	Value
Bizform settings	**Form name**	**Campaign_Contacts**

4. Select the **Conversion tracking** tab and then click the **New** button as shown in the following screenshot.

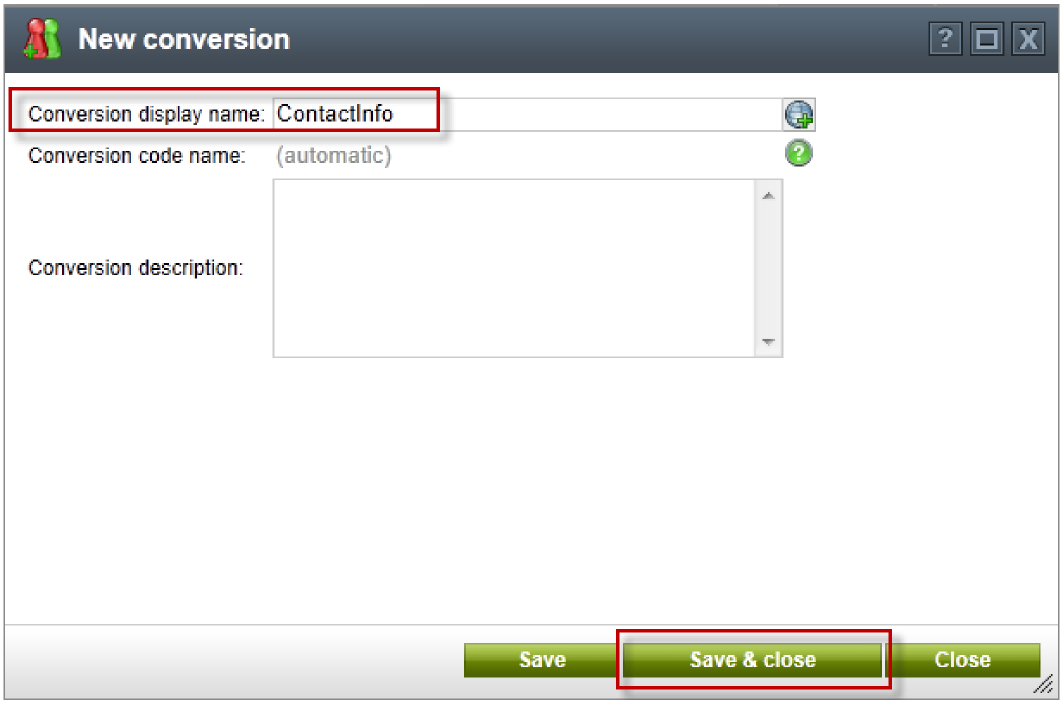




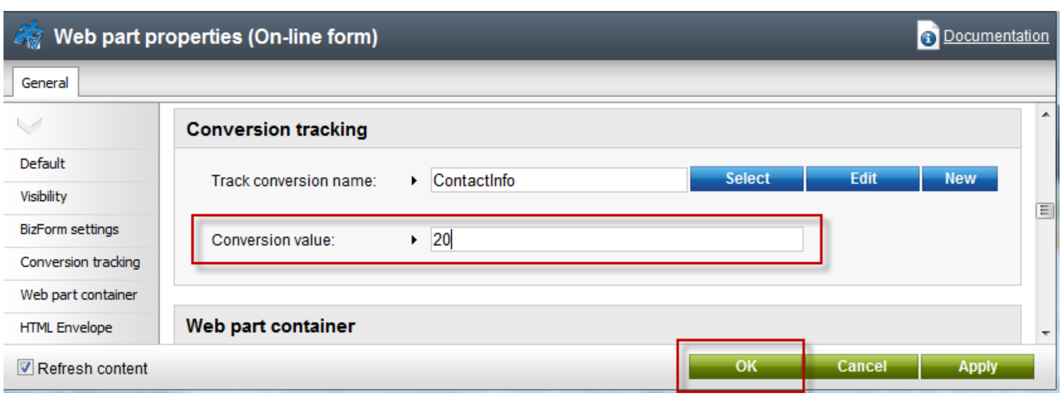
What is a conversion?

Conversions are specific actions performed by site visitors and recorded by the Web analytics module. This is typically done for specific events you want to track or as part of a broader campaign. Once you start tracking conversions on the live site, these can be compared to other web analytics statistics like the amount of visitors. This allows you to evaluate the website and adjust marketing strategies as necessary.

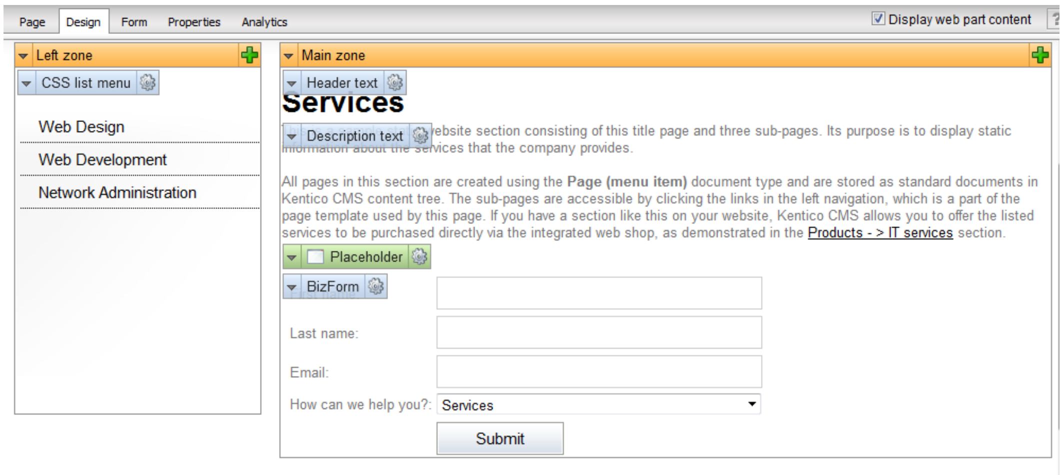
5. In the **New conversion** screen in the **Conversion display name** field enter **ContactInfo** and then select **Save& close** as shown in the following screenshot.



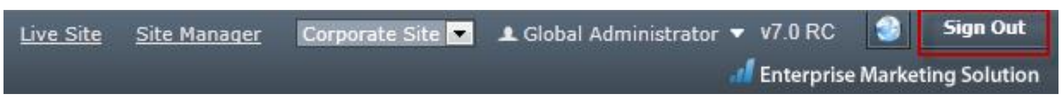
6. In the **Web part properties (On-line form)** screen in the **Conversion value** field enter **20** and then select **Ok** as shown in the following screenshot.



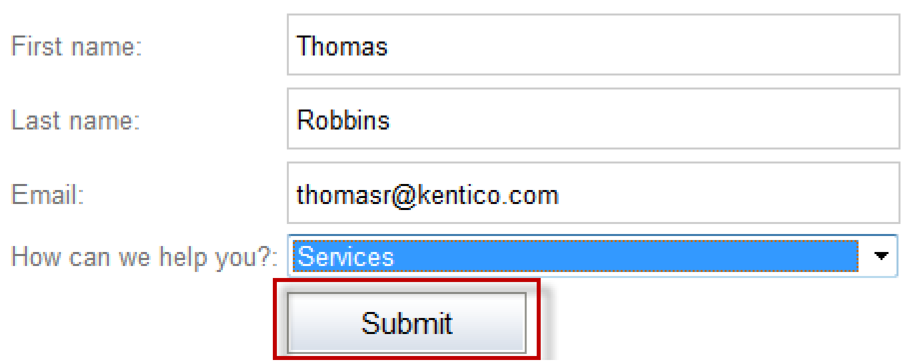
7. Confirm that you see the screen as shown in the following screenshot.



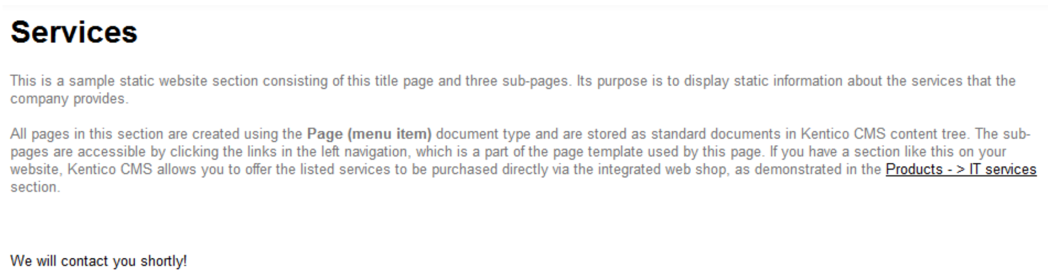
8. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



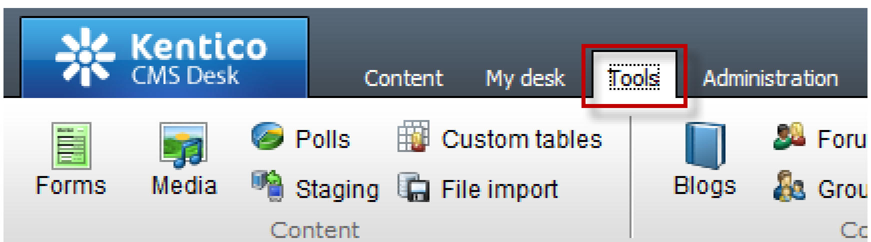
9. On the **Live** site select the **Services** page, update the online form with your contact information and select **Submit** as shown in the following screenshot.



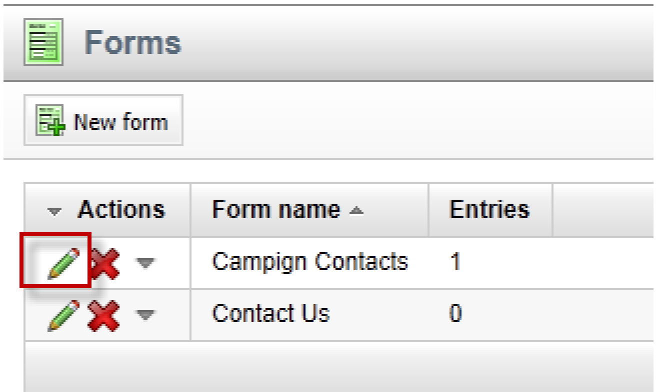
10. Once the form is submitted validate that you see the following screenshot.



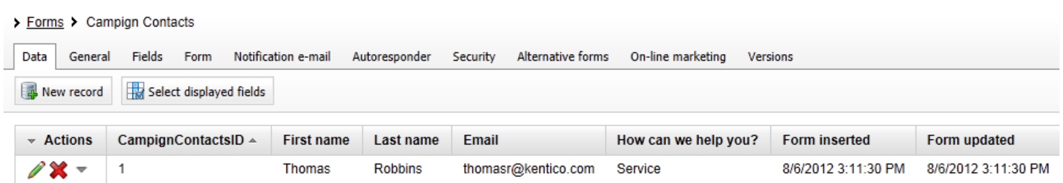
11. Log into **CMS Desk**, select the **Tools** tab, then select **Forms** as shown in the following screenshot



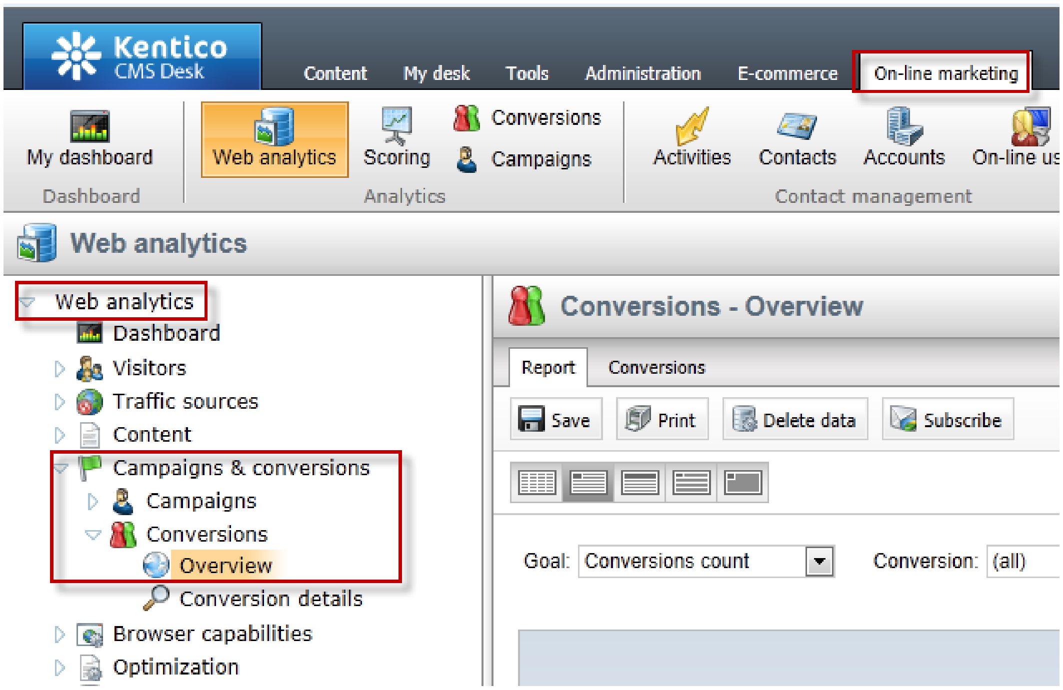
12. In the **Forms** screen select the **Edit icon (pencil)** for **Campaign Contacts** as shown in the following screenshot.



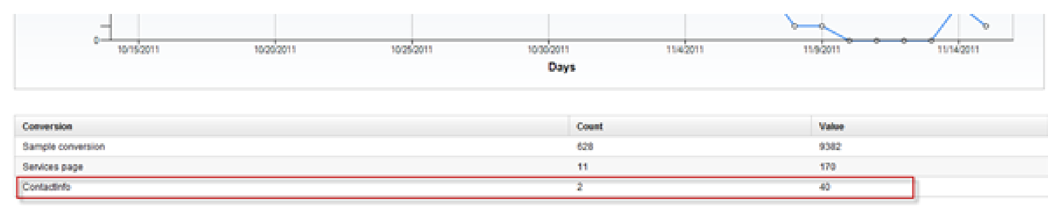
13. Validate that you see the data as shown in the following screenshot.



14. Click the **On-line marketing** tab, then select the **Web analytics** button, in the **Web analytics** list expand **Campaigns & conversion**, then expand **Conversions** and select **Overview** as shown in the following screenshot.



15. Validate that you see a report similar to the following screenshot.

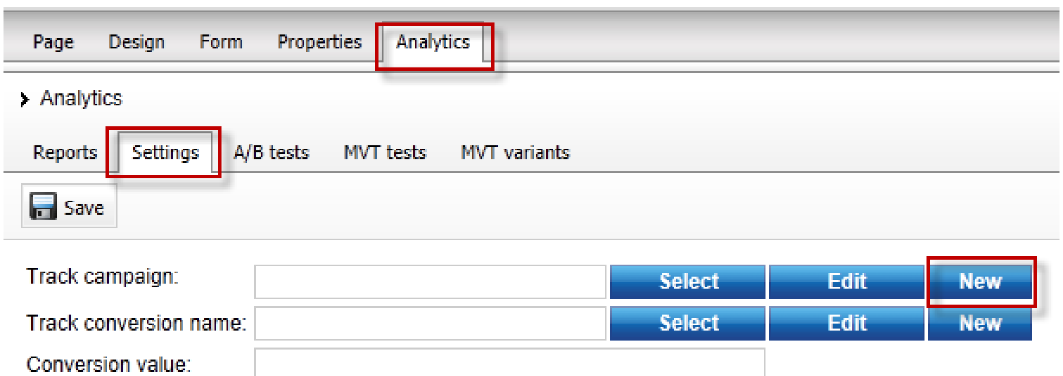


Lab 1-2: Creating the Services campaign

Kentico EMS offers a variety of ways to create campaigns. Each is dependent on the type and purpose of your marketing strategy. With the completion of the online form we are now ready to create the document based campaign for the Services page. This campaign includes page visits to the Services page and completion of the online form.

Lab 2-1: Create a document campaign

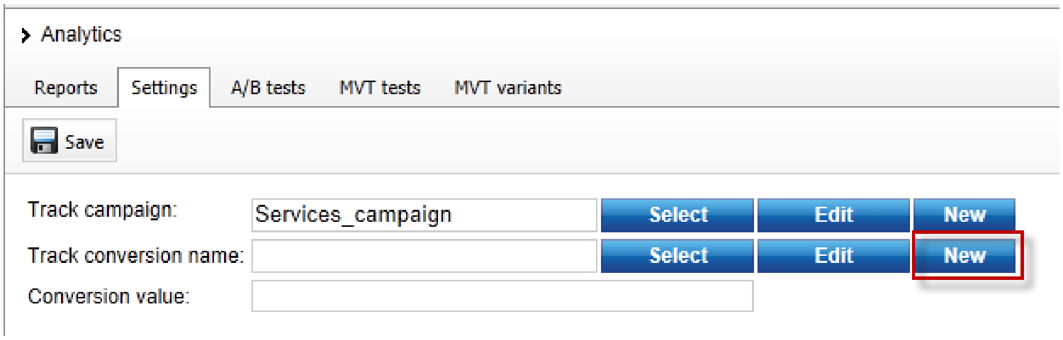
1. Select the **Content** tab, in the Content tree select the **Services** page, then click the **Analytics** tab, **Settings** tab and in **Track campaign** select the **New** button as shown in the following screenshot.



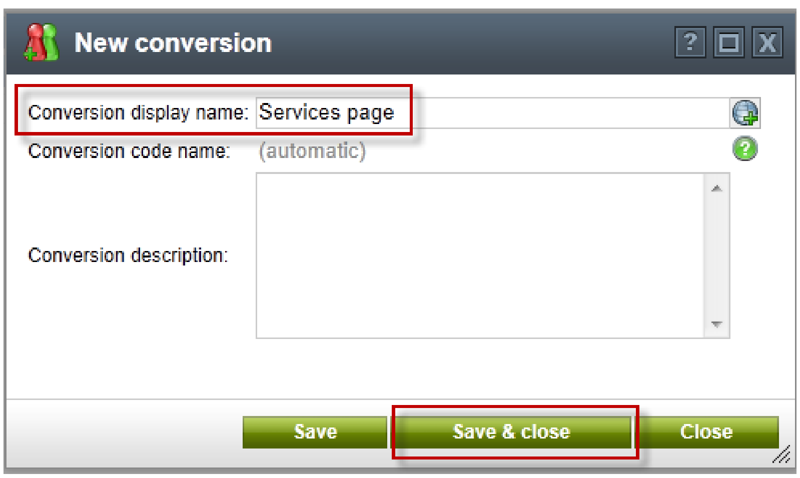
2. In the **New campaign** dialog update the following fields and select **Save & close.**

Section	Field	Property
Campaign basic settings	**Campaign display name**	**Services campaign**
Campaign basic settings	**Open from**	**Now**
Campaign basic settings	**Open to**	**Now + 2 weeks**
Advanced campaign settings	**Campaign impressions**	**20000**
Advanced campaign settings	**Total cost**	**10000**

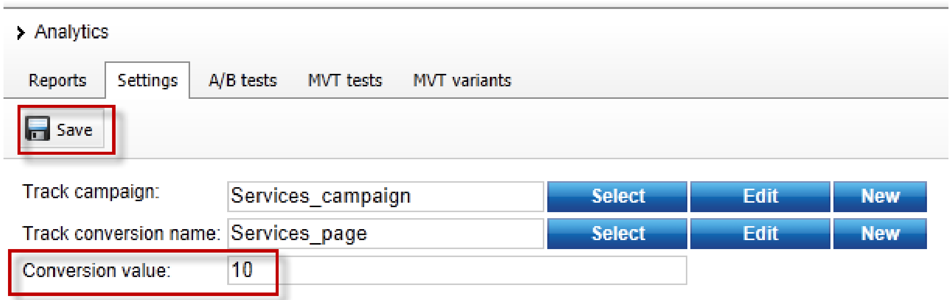
3. In the **Track conversion name** click the **New** button as shown in the following screenshot.

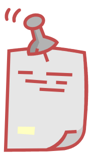


4. In the **New conversion** dialog in the **Conversion display name** field enter **Services page** and then select **Save & close** as shown in the following screenshot.



5. In the **Conversion value** field enter **10** and then select **Save** as shown in the following screenshot



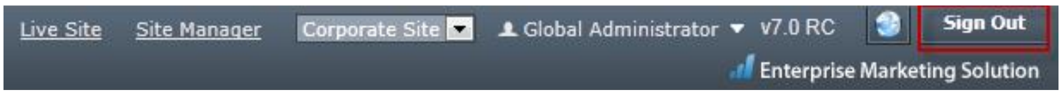


Why another conversion?

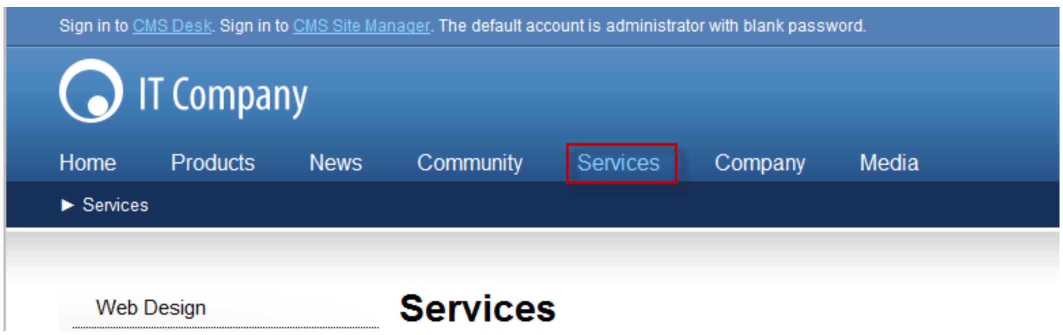
The Services page campaign includes two tracked conversions. The first we created earlier with the online form. The Service page conversion tracks the traffic to the Services page.

Lab 2-2: Creating Campaign Data

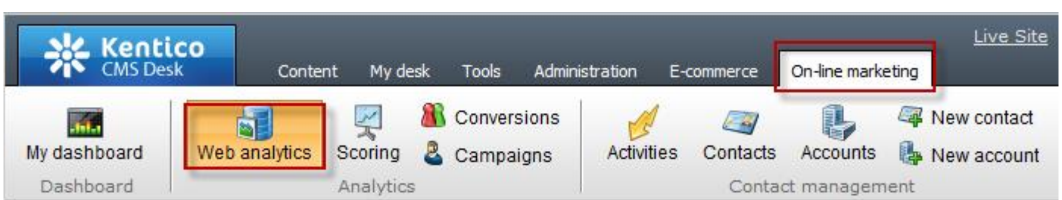
1. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



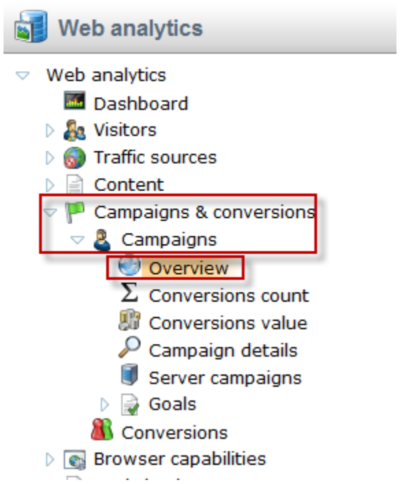
2. On the **Live** site select the **Services** page as shown in the following screenshot.



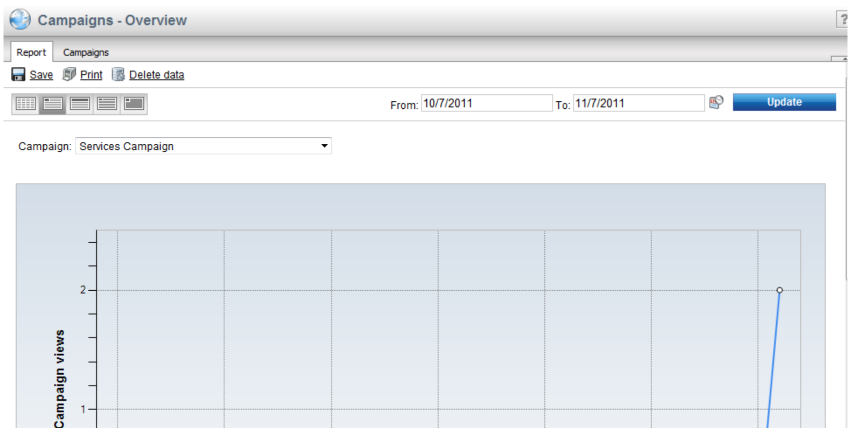
3. Log into **CMS Desk**, select the **On-line marketing** tab, and then the **Web analytics** button as shown in the following screenshot.



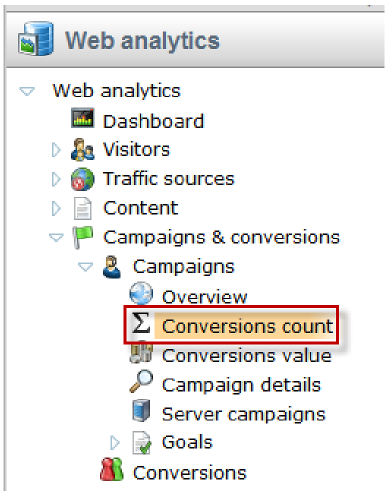
4. In the **Web analytics** list expand **Campaigns & conversion**, then expand **Campaigns** and then select the **Overview** report as shown in the following screenshot.



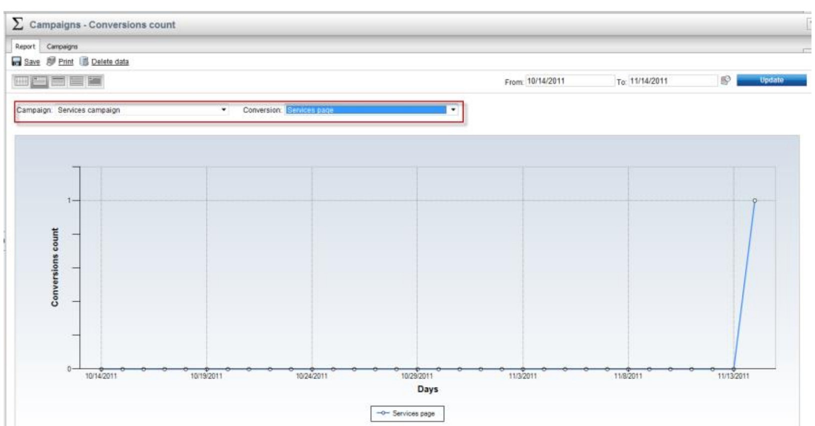
5. In the **Campaign** drop down select the **Services campaign** and validate that you see a report similar to the following screenshot.



6. Select the **Conversion count** report as shown in the following screenshot.



7. In the **Campaign** dropdown select the **Services campaign**, then in the **Conversion** dropdown select the **Service page** and validate that you see a report similar to the following screenshot.



Lab 1-3: Optimizing Campaigns with A/B testing

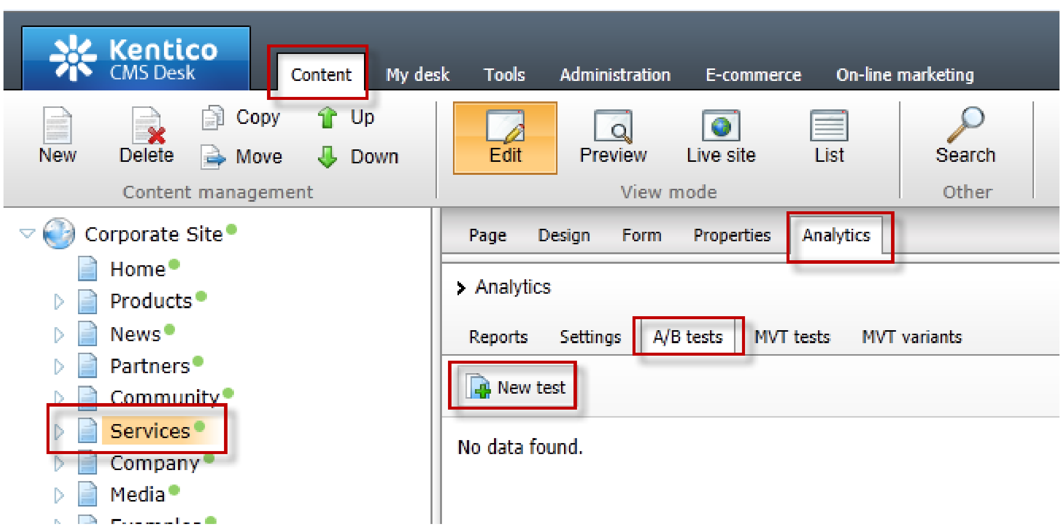
As a campaign progresses it's important to continually evaluate and refine. This can often include page elements like messaging and typography to find better ways to engage site visitors. In this lab we will create an A/B test of our services page as a way to increase our campaign conversions. Within Kentico EMS the first step is to create the A/B test and then create the variant page that will be used for the testing process.

What's the difference between A/B and MVT Testing?

A/B testing is different than MVT Testing. An A/B test uses a combination of pages and tests elements like copy text, layouts, images and colors. MVT Testing is focused on web part zones, web parts, and widgets.

Lab 3-1: Creating the A/B test

1. Select the **Content** tab, in the Content tree select the **Services** page, select the **Analytics** tab, select the **A/B tests** tab and click the **New test** link as shown in the following screenshot

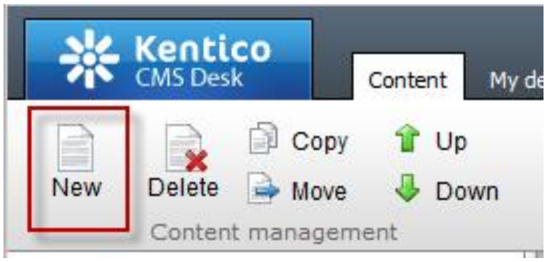


2. In the **New test** screen update the following fields and then select the **Save** button.

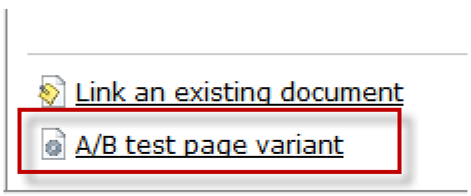
Field	Value
Display name	**AB Services**
Target number of conversions	**100**
Test from	**Now**
Test to	**Now + 2 weeks**
Test enabled	**Checked**

Lab 3-2: creating the variant page

1. With the **Services** page selected in the Content tree, select the **New** button as shown in the following screenshot.



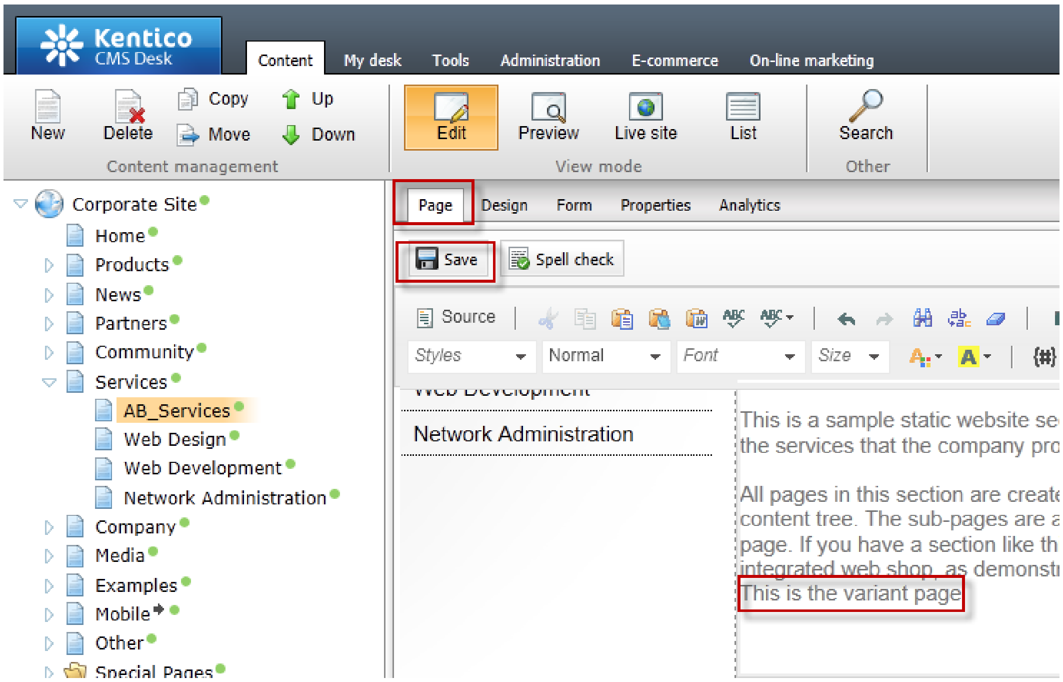
2. In the **New document** screen at the bottom select the **A/B test page variant** link as shown in the following screenshot.



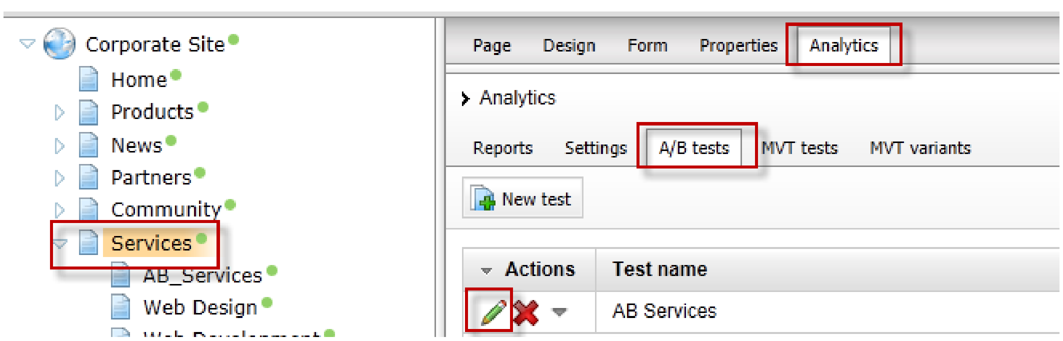
3. Update the following fields and then select the **Save** button.

Field	Value
Document name	**AB_Services**
Assign to A/B test	**AB Services**

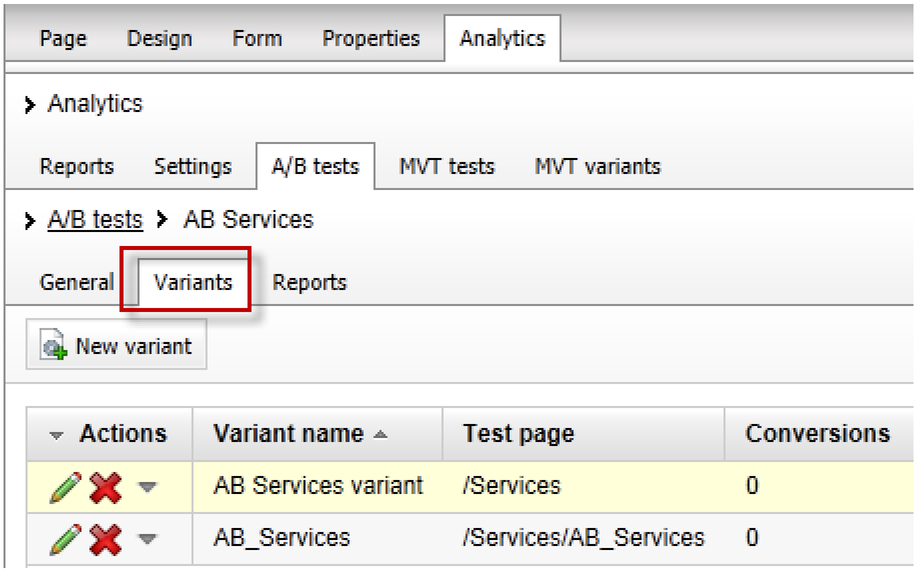
4. Select the **Page** tab in the Editable region add the text **This is the variant page** and then select the **Save** button as shown in the following screenshot.

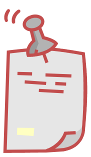


5. In the Content tree select the **Services** page, then select the **Analytics** tab, then the **A/B tests** tab and for the **AB Services** test click the **Edit (pencil)** icon as shown in the following screenshot.



6. Select the **Variants** tab as shown in the following screenshot.

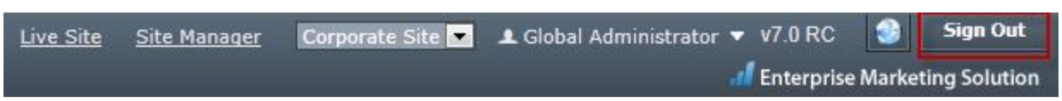




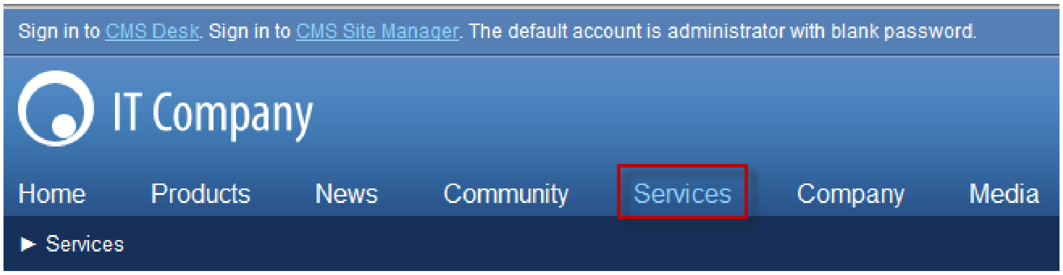
What is this?

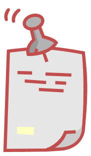
The variants tab shows the current page variants that are included as part of the running AB Services test.

7. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



8. On the **Live** site select the **Services** page as shown in the following screenshot



**It's random!**

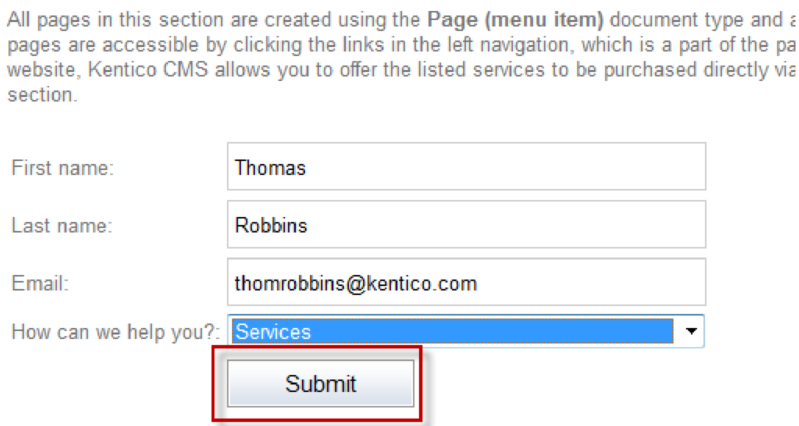
Remember the page received is random. Once you receive the Services page the cookie distributed to your machine will always open the same page. If you have a second browser available go ahead and try it!

Lab 1-4: Scoring contacts

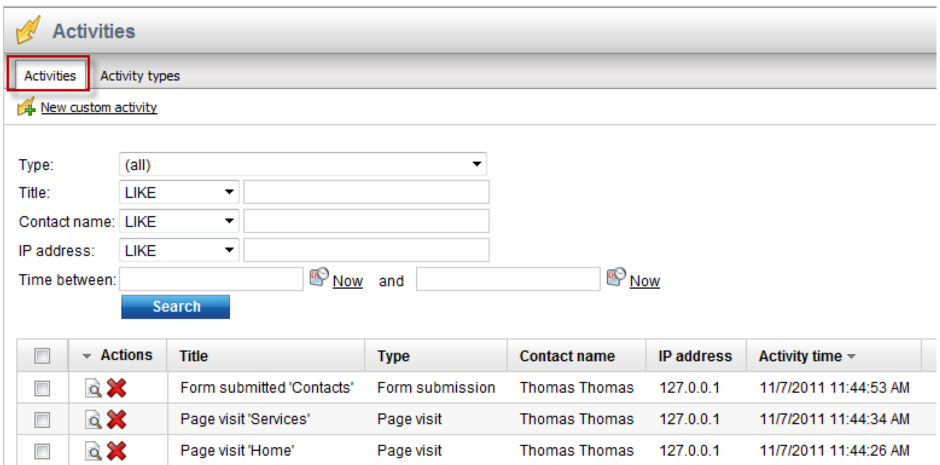
With the campaign running and proper demand generation our page will begin to receive site visits and contact form submissions. Once leads are collected they can be scored to show the weighting of their potential opportunities for our sales staff. In this lab we will enter our contact information and then create an Activity based scoring rule.

Lab 4-1: Creating the contact

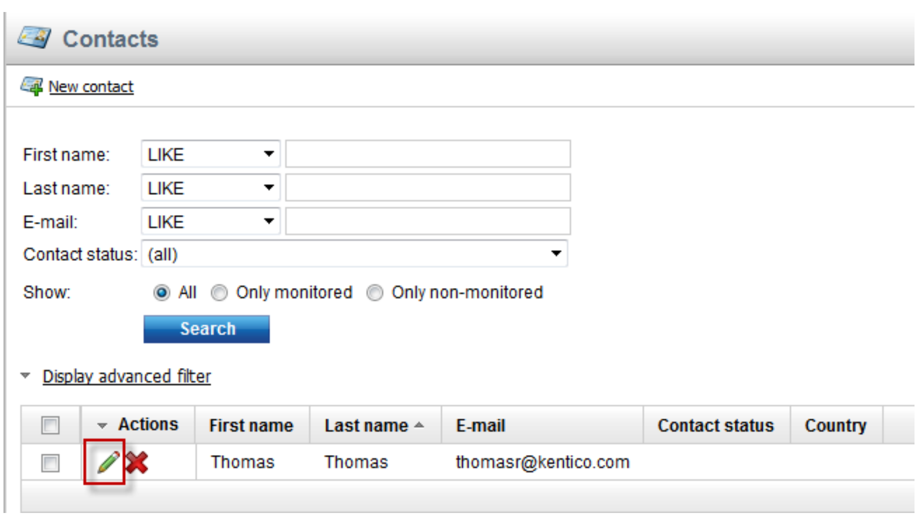
1. From the **Live site** select the **Services** page, in the **Contact form** enter your contact information and click the **Submit** button as shown in the following screenshot



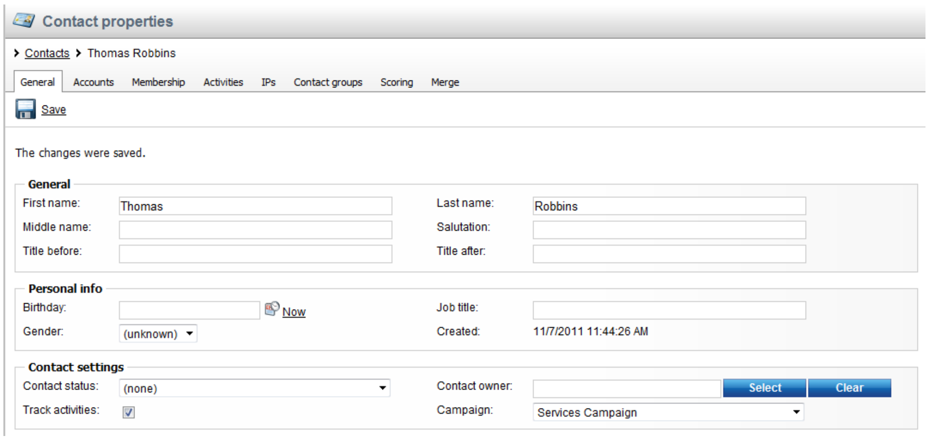
2. Log into **CMS Desk** as **Administrator** select the **On-line marketing** tab, click the **Activities** tab and validate that you see the form submission as shown in the following screenshot



3. Select the **Contacts** tab and then select the **Edit icon (pencil)** as shown in the following screenshot

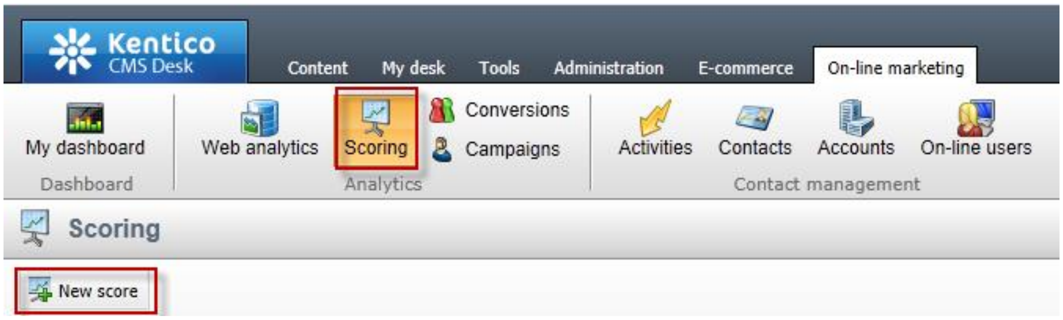


4. Validate that you see the **Contact properties** as shown in the following screenshot

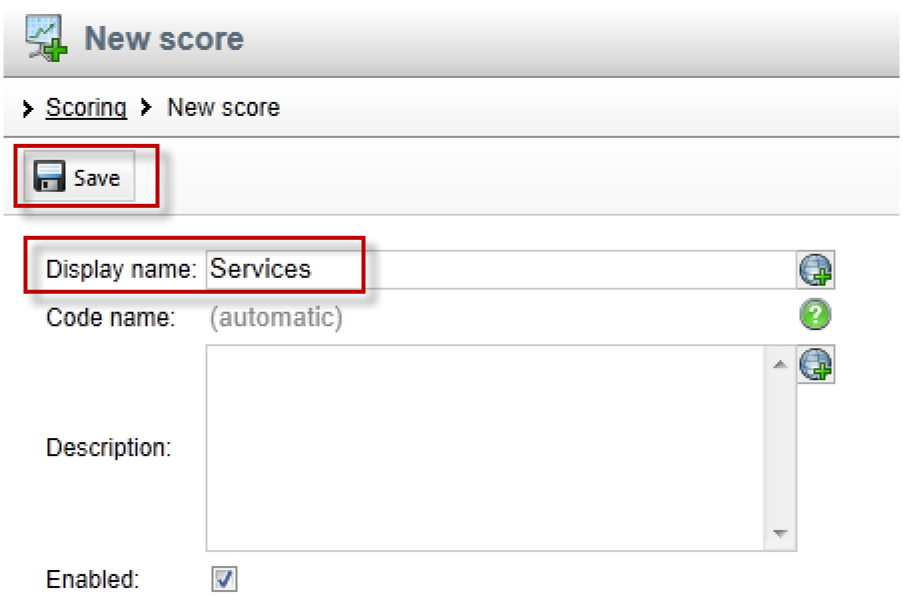


Lab 4-2: Creating the scoring rules

1. Click the **Scoring** button and then select the **New score** link as shown in the following screenshot.

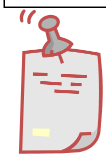


2. In the **New score** screen in the **Display name** field enter **Services** and then click the **Save** button as shown in the following screenshot.



3. In the **General** tab update the following fields and select the **Save** button.

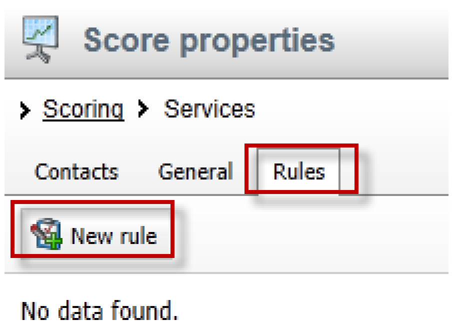
Field	Value
Send notification at score	**20**
Notification e-mail address	**Your email**



Why enter another score?

When a contact score reaches the value of 20, a notification email is automatically generated to the email address specified.

4. Select the **Rules** tab and select the **New rule** link as shown in the following screenshot



5. In the **New rule** screen update the following fields .

Field	Value
Display name	**Campaign contacts**
Value	**20**
Rule Type	**Activity**

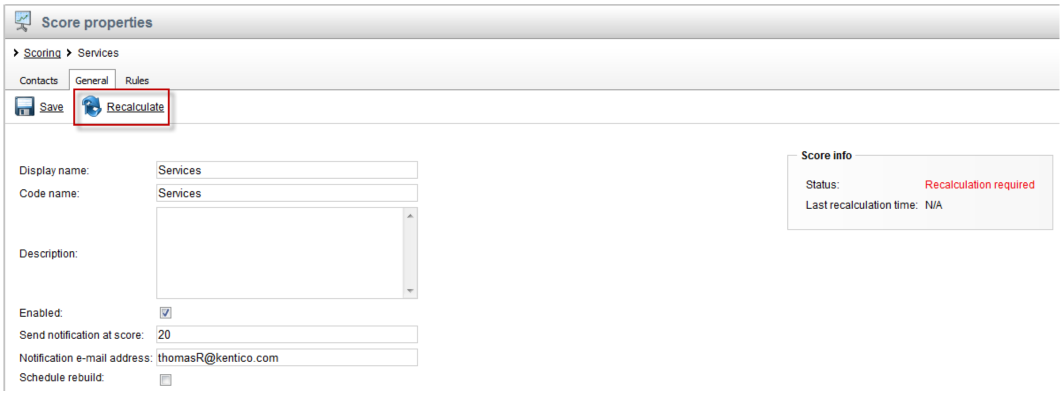
What is the rule type?

Rules are used to segment contacts for scoring. Kentico EMS supports two types of rules. Attribute based rules look for similarities in system values. Activity rules are based on the completion of a specific activity.

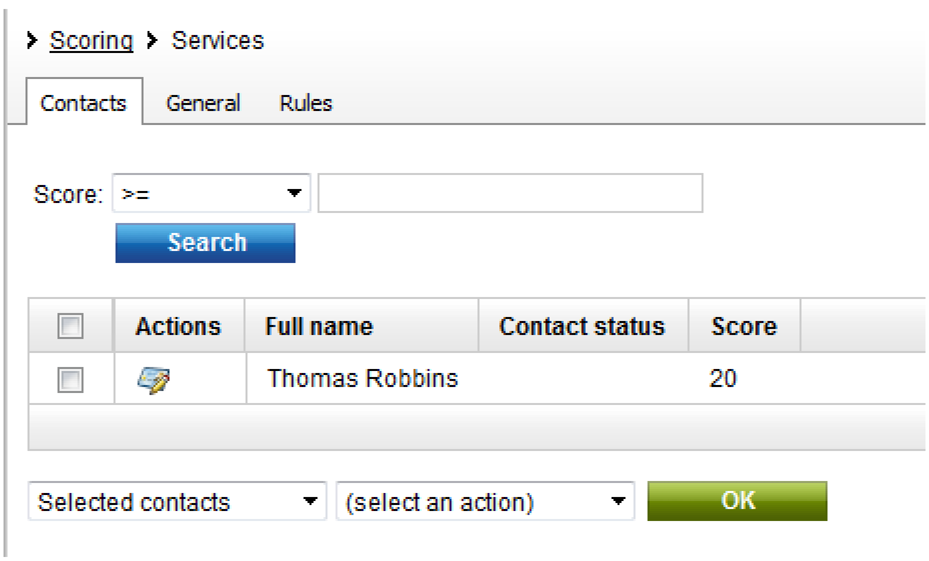
6. Update the following fields and then select the **Save** button.

Section	Field	Value
Rule Settings	**Activity**	**Form Submission**
Activity details	**Form**	**Campaign Contacts**

7. Select the **General** tab and click the **Recalculate** link as shown in the following screenshot



8. Click the **Contacts** tab and validate that you see your contact information as shown in the following screenshot



Summary

In this set of Hands on Labs we looked at how to create a campaign and collect customer information. We then looked at how we can optimize this campaign further with an A/B test. Specifically, we covered the following.

- Creating an online form
- Linking an online form to contacts with EMS
- Creating a document campaign
- Creating an A/B test
- Collecting contact information
- Scoring contacts

Key Resources:

- http://devnet.kentico.com/Documentation.aspx
- http://devnet.kentico.com/Videos/ABTest.aspx

Hands on Lab 2:
Custom Table: Create and Display

Lab overview

System Requirements:

- Kentico CMS 7 with the Sample Corporate Site

Intended Lab Audience:

- CMS Designers
- CMS Developers

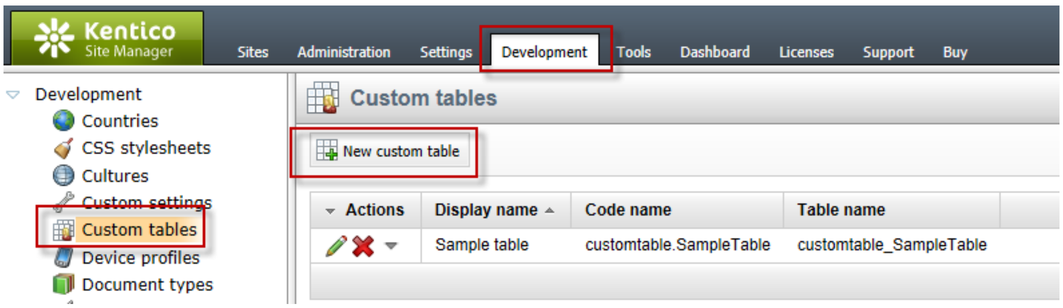
Lab introduction

Kentico CMS provides custom tables as a way to store and manage custom data. Technically, they are SQL tables and coupled stored procedures. Once a custom table is created and contains data, the next step is to provide a display for site visitors. In this lab we will add a custom table and then use the Basic Repeater web part to display it on a page. We will also look at how to use the Kentico CMS API to add and edit an existing item. In completing this set of labs you will perform the following tasks:

- Create a custom table
- Explore the Data Source web part
- Explore the Basic Repeater web part
- Edit a transformation for better visual display
- Add a new item to the custom table using the Kentico CMS API
- Edit an existing item using the Kentico CMS API

Lab 2-1: Creating a custom table

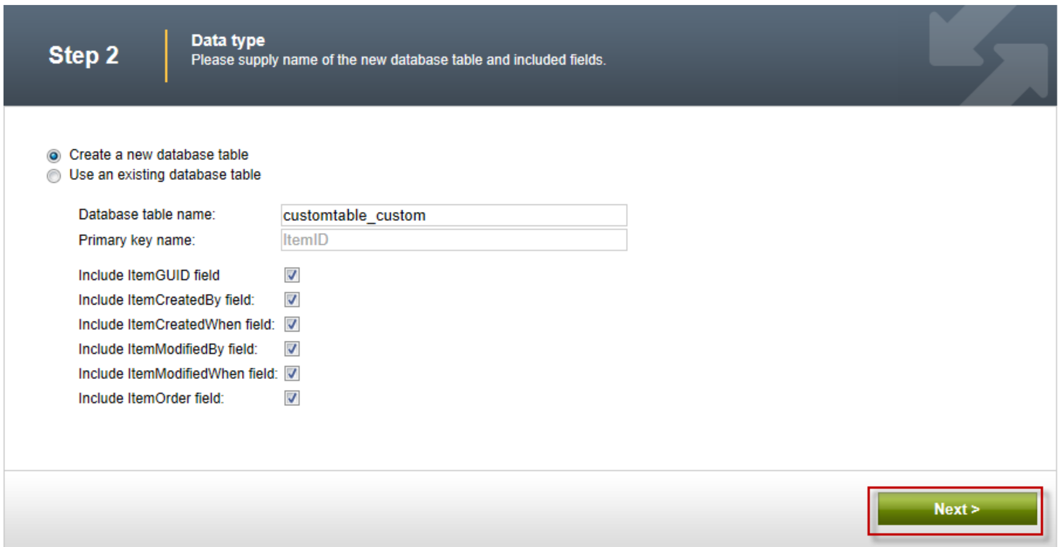
1. As **Administrator** log into **CMS Site Manager**, select the **Development** tab, then select **Custom tables**, and click **New custom table** as shown in the following screenshot.



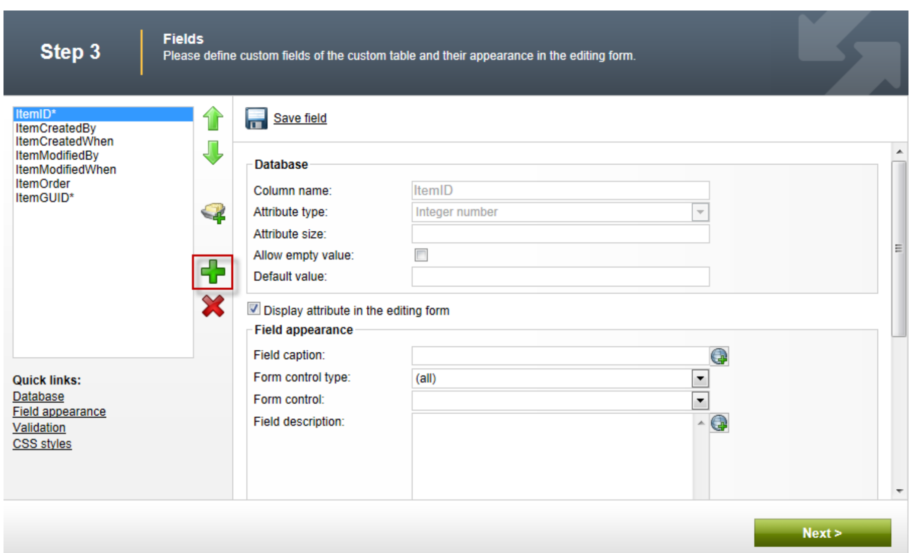
2. In **Step 1- General** update the following fields and then click **Next.**

Field	Value
Custom table display name	**Customer Contacts**
Custom table code name (custom table)	**custom**

3. In **Step 2 – Data type** click **Next** as shown in the following screenshot.



4. In **Step 3 – Fields** click the **New attribute (+)** button as shown in the following screenshot.



5. In the **New attribute (+)** dialog update the following fields and then click **Save**.

Section	Field	Value
Database	**Column name**	**Name**
Database	**Attribute size**	**100**
Field appearance	**Field caption**	**Name**
Field appearance	**Form control**	**Textbox**

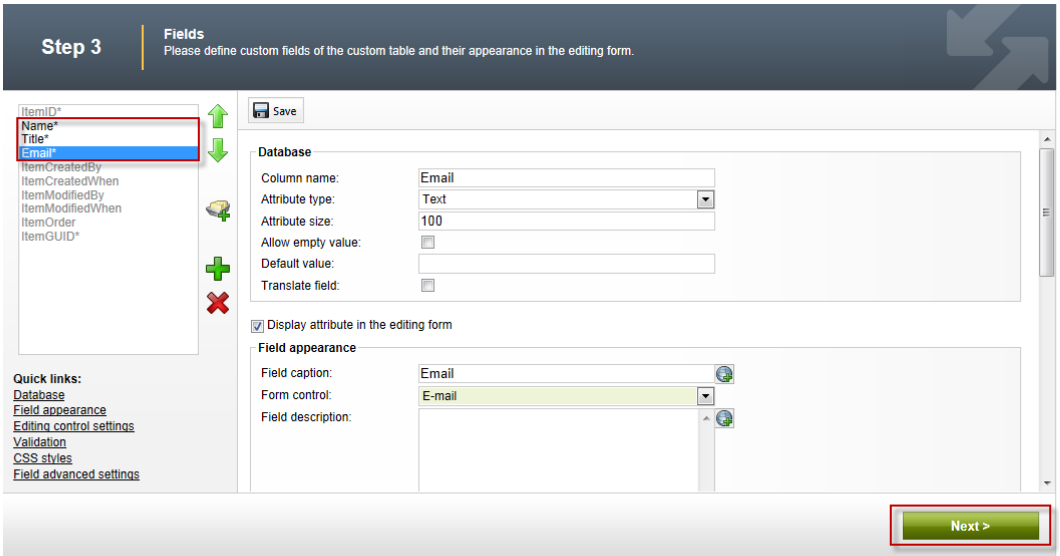
6. Select the **New attribute (+)** button, update the following fields and then click **Save.**

Section	Field	Value
Database	**Column name**	**Title**
Database	**Attribute size**	**100**
Field appearance	**Field caption**	**Title**
Field appearance	**Form control**	**Textbox**

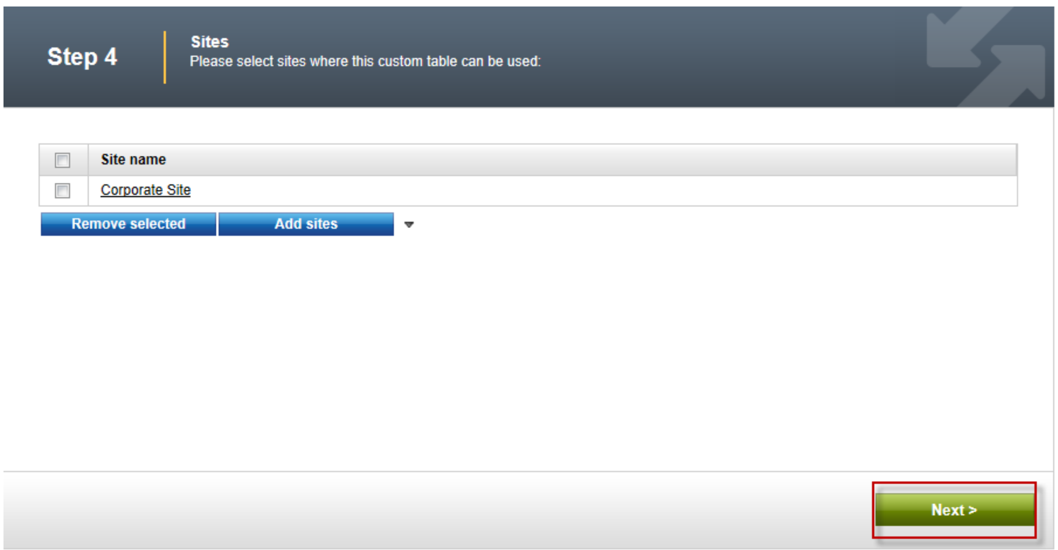
7. Select the **New attribute (+)** button, update the following fields, and then click **Save.**

Section	Field	Value
Database	**Column name**	**Email**
Database	**Attribute size**	**100**
Field appearance	**Field caption**	**Email**
Field appearance	**Form control**	**E-mail**

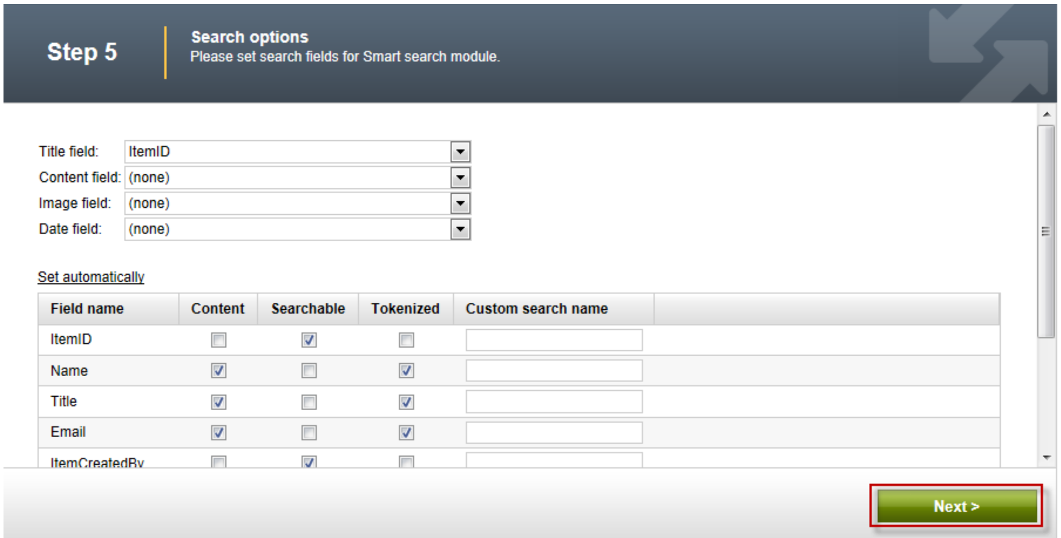
8. In **Step 2 – Fields** validate that you see the new fields and then click the **Next** button as shown in the following screenshot.



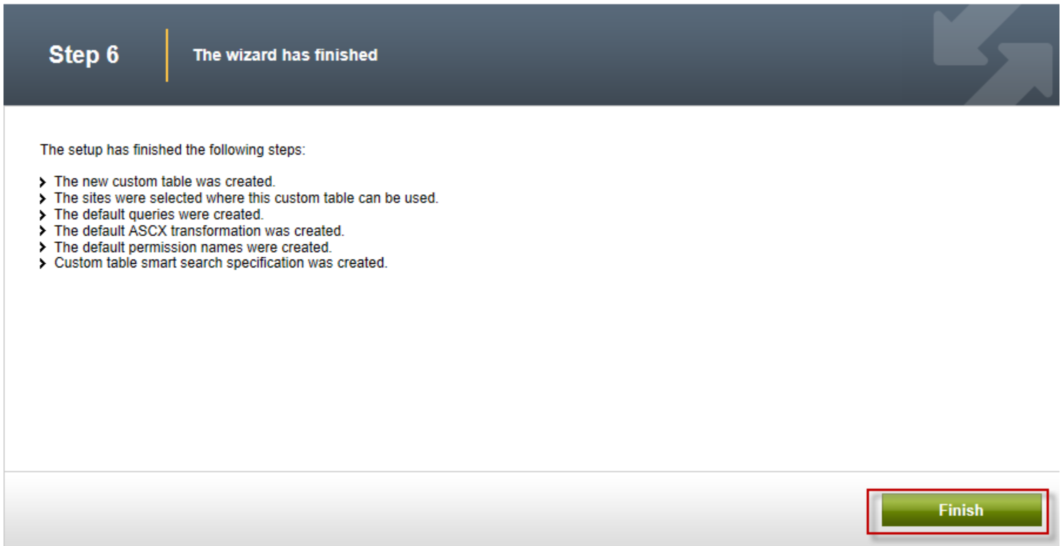
9. In **Step 4 – Sites** click the **Next** button as shown in the following screenshot.



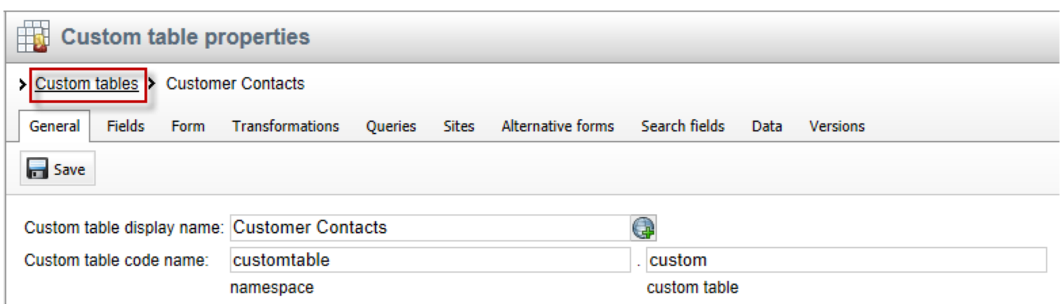
10. In **Step 5 – Search options** click the **Next** button as shown in the following screenshot.



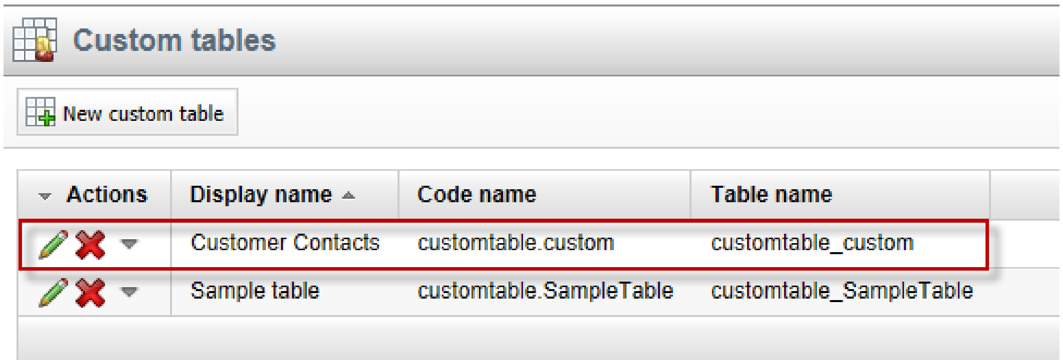
11. In **Step 6 – The wizard has finished** click the **Finish** button as shown in the following screenshot.



12. In the **Custom table** properties screen click the **Custom tables** link as shown in the following screenshot.

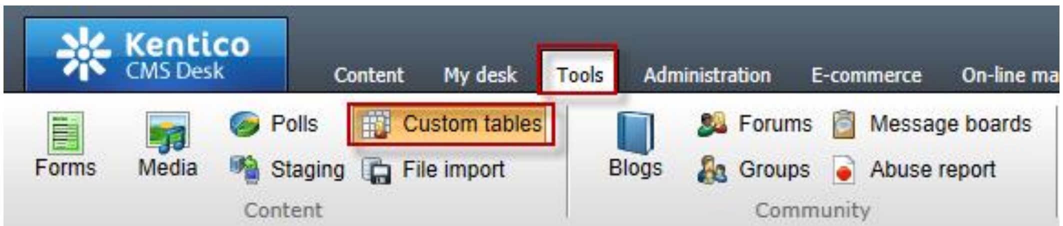


13. In the **Custom tables** screen validate that the **Customer Contacts** custom table is displayed as shown in the following screenshot.

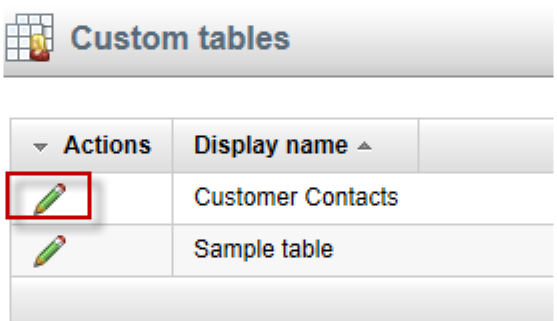


Lab 2-2: Adding custom table data

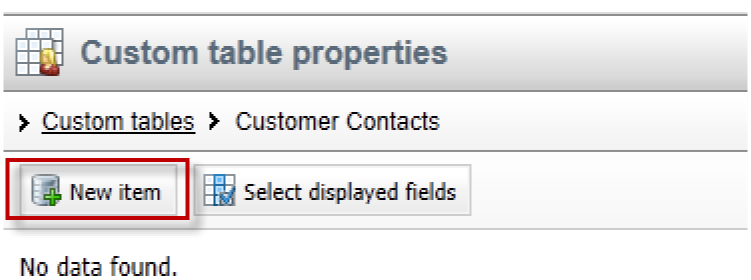
1. As **Administrator** log into **CMS Desk**, select the **Tools** tab, then select the **Custom tables** button as shown in the following screenshot.



2. In the Custom tables screen select the **Edit (Pencil)** icon for **Customer Contacts** as shown in the following screenshot.



3. In the Custom table properties screen select the **New item** button as shown in the following screenshot.



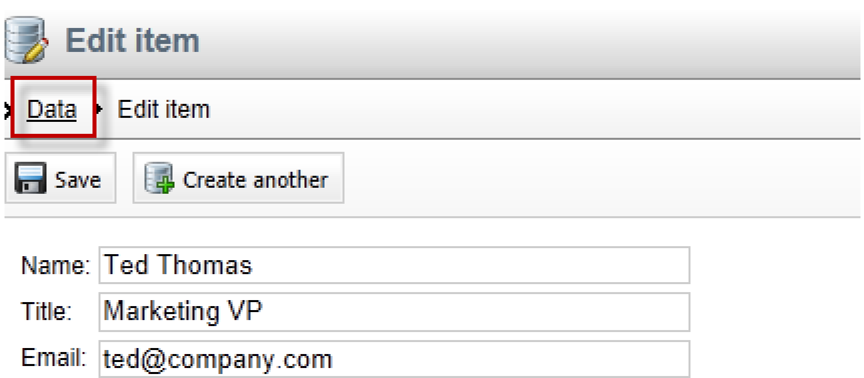
4. In the **New item** screen update the following fields and then select the **Save** button.

Field	Value
Name	**Joe Brown**
Title	**President**
Email	joe@company.com

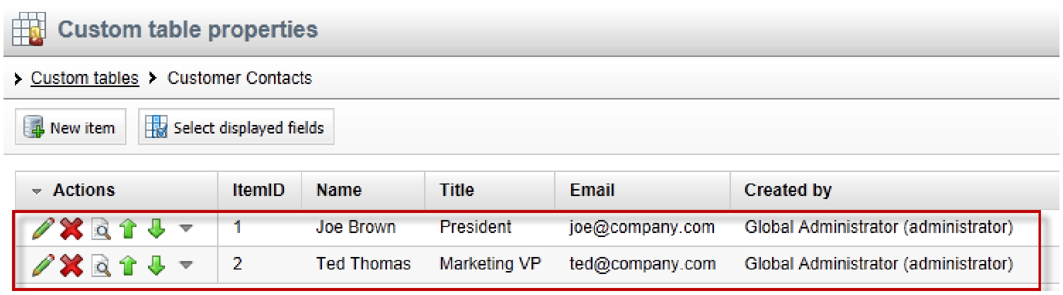
5. In the Edit item screen click the **Create another** button, update the following fields, and then click the **Save** button.

Field	Value
Name	**Ted Thomas**
Title	**Marketing VP**
Email	**ted@company.com**

6. On the Edit item screen click the **Data** link as shown in the following screenshot.

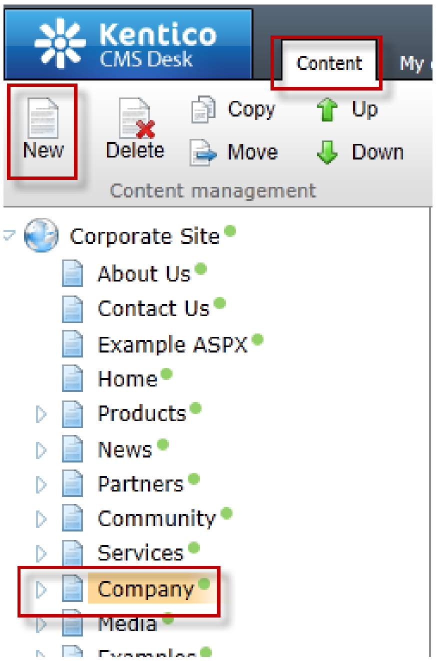


7. In the Custom table properties screen validate that the two items just entered are visible as shown in the following screenshot.

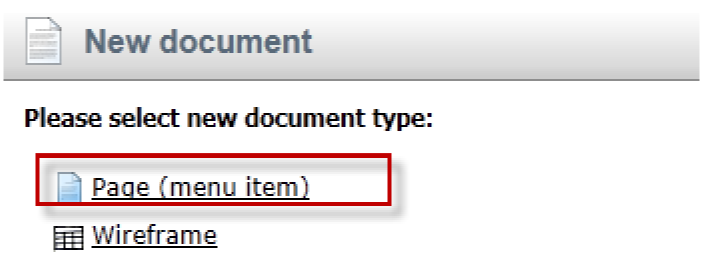


Lab 2-3: Creating the display page

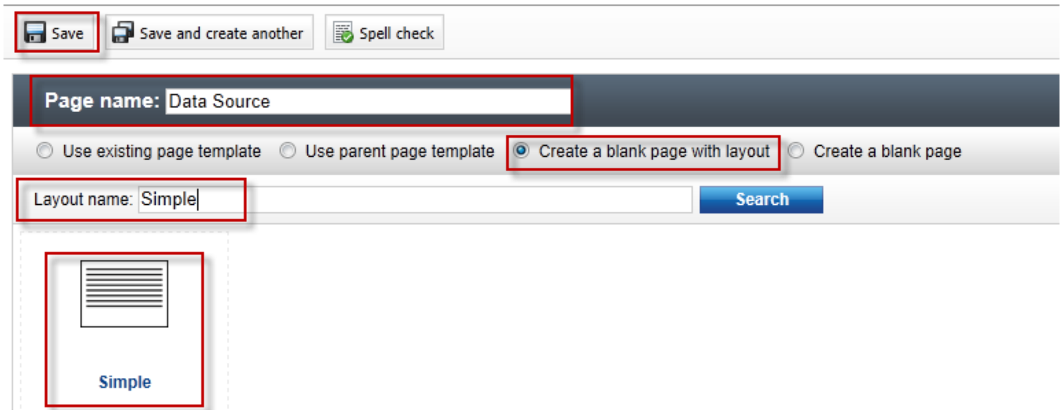
1. In CMS Desk select the **Content** tab, in the Content tree select **Company** and then click the **New (Paper)** icon, as shown in the following screenshot.



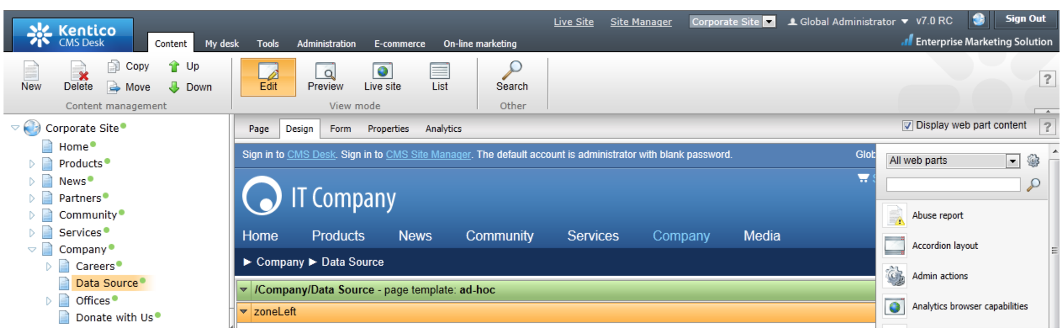
2. In the New document screen click the **Page (menu item)** as shown in the following screenshot.



3. In the **New Page (menu item)** screen in the **Page name** enter **Data Source**, click **Create a blank page with layout**, in the **Layout name** enter **Simple**, then click the **Search** button, select the **Simple** page template, and finally click the **Save** button as shown in the following screenshot.

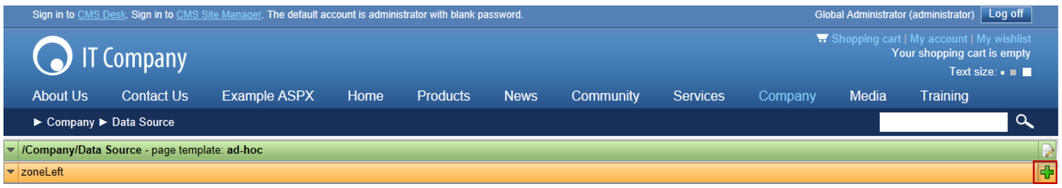


4. Validate that you see the new Data Source page as shown in the following screenshot.

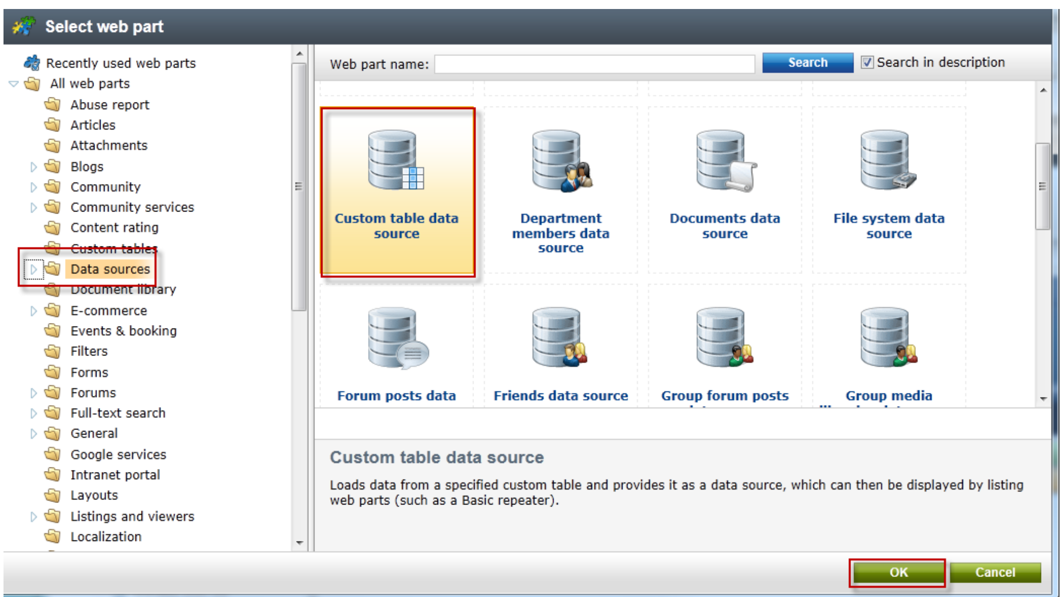


Lab 2-4: Displaying custom table data

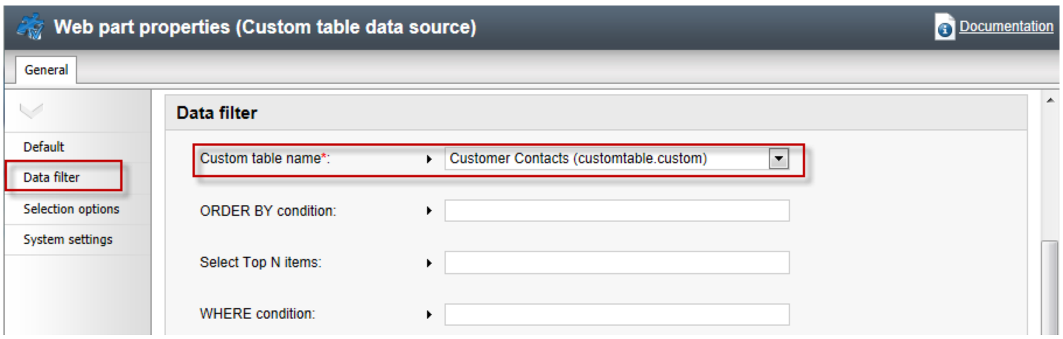
1. In the **zoneLeft** web part zone, click the **Add web part icon (+)** as shown in the following screenshot.

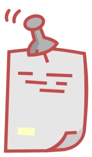


2. In the **Select web part** screen select **Data sources**, then select the **Custom table data source** web part, and then click **OK** as shown in the following screenshot.



3. In the **Web part properties (Custom table data source)** screen select the **Data filter** tab, in the **Custom table name** field select the **Customer Contacts (customtable.custom)** and then click **Ok** as shown in the following screenshot.

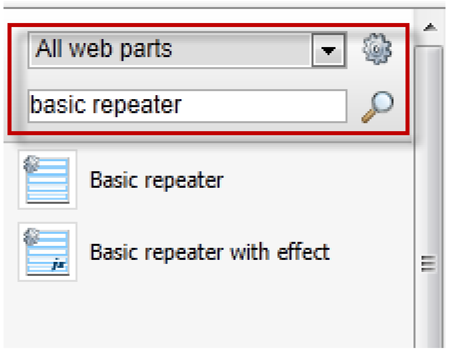




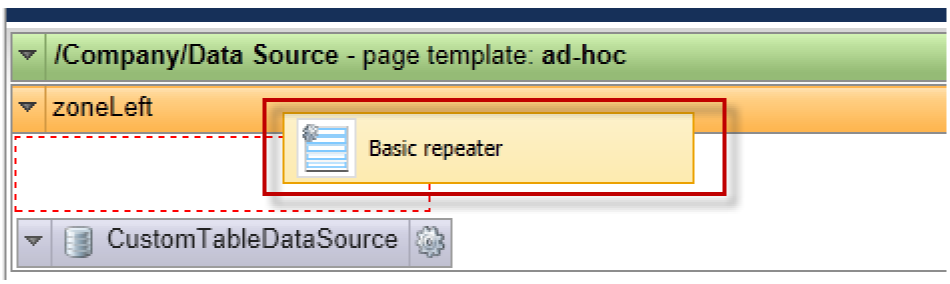
What is a data sources web part?

Data source web parts are used to connect and retrieve data from back end data sources like custom tables. They retrieve data and pass them to display web parts. This separation is designed to provide page based flexibility in data retrieval and display. Data sources provide reusable sources of data. They reduce page resources as data is retrieved just once and then can be used by different web parts on the same template to display content.

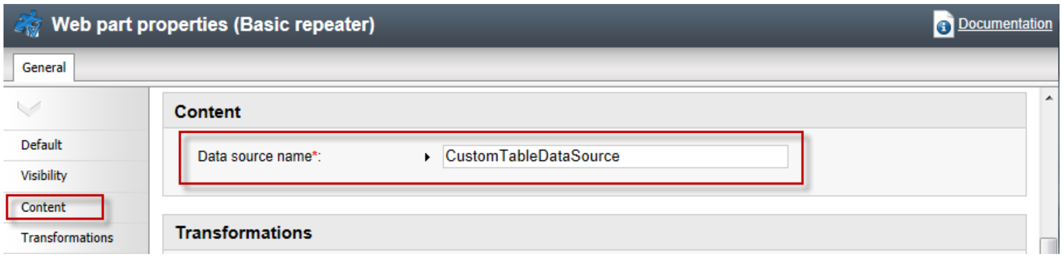
4. In the All web parts list enter **Basic repeater** and then click **Search (magnifying glass)** as shown in the following screenshot.

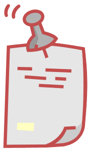


5. From the all web parts list drag the **Basic repeater** web part into the **ZoneLeft** web part zone as shown in the following screenshot.



6. In the **Web part properties (Basic repeater)** select the **Content** tab, and in the **Data source name** field enter **CustomTableDataSource** as shown in the following screenshot.





Connecting to Data Sources

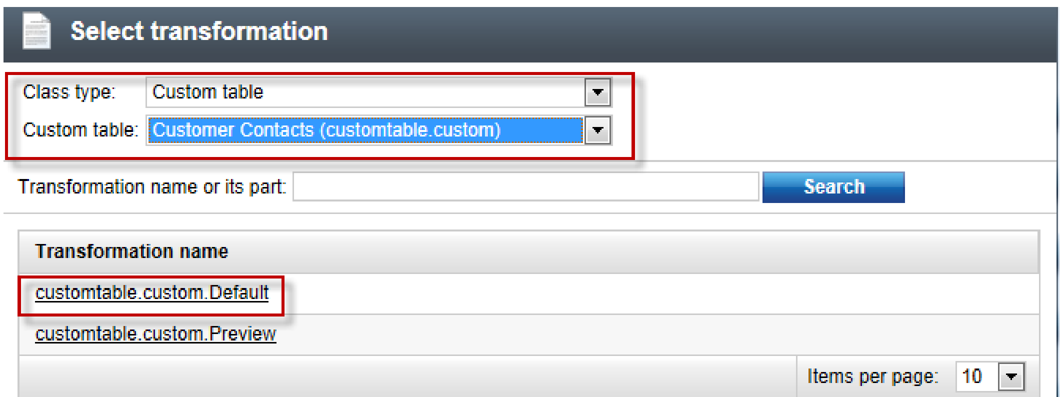
The Data source name field is the connection between this web part and the data source web part we added in Step 2 and must be an exact match.

7. In the **Web part properties (Basic repeater)** screen select the **Transformation** tab, and in the **Transformation name** field click the **Select** button as shown in the following screenshot.

What is a transformation?

When data is passed from the data source web part to the Basic repeater a set of formatting code (transformation) is applied to define the output that is displayed.

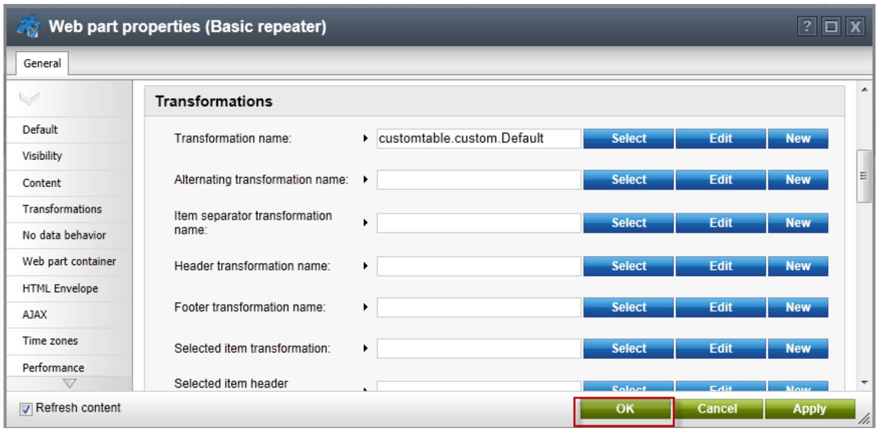
8. In the **Select transformation** dialog in the **Class type** drop down select **Custom table**, in the **Custom table** drop down select **Customer Contacts (customtable.custom)**, then click the **customtable.custom Default** transformation as shown in the following screenshot.



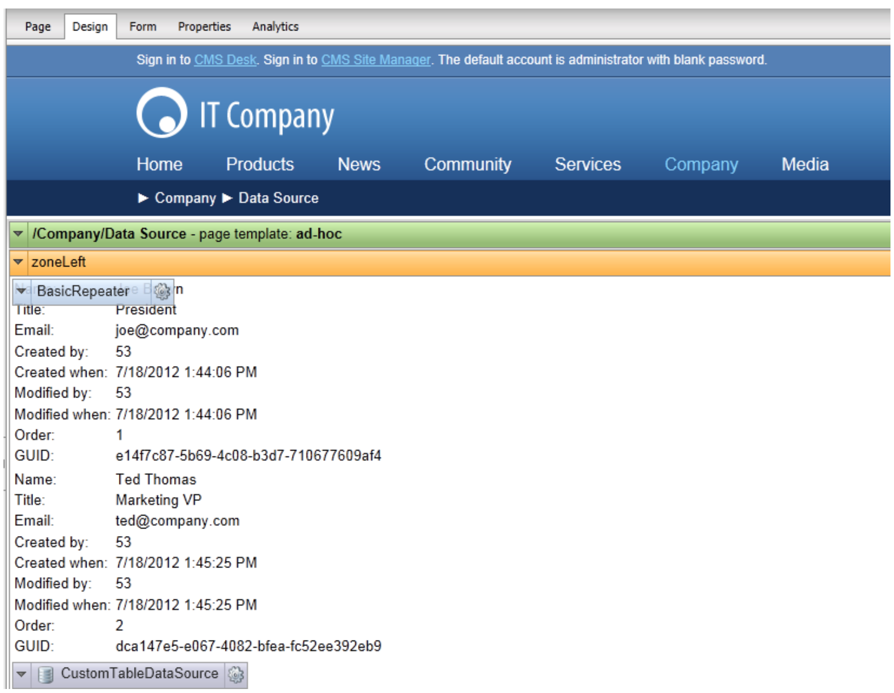
Where did these come from?

When we created the custom table the system automatically creates a Default and Preview transformation

9. In the **Web part properties (Basic repeater)** screen select **Ok** as shown in the following screenshot.

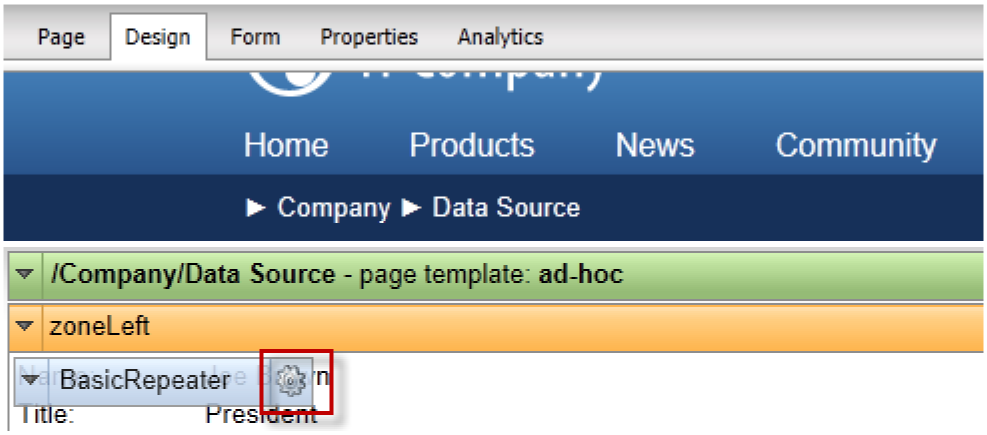


10. Validate that the data is displayed as shown in the following screenshot.

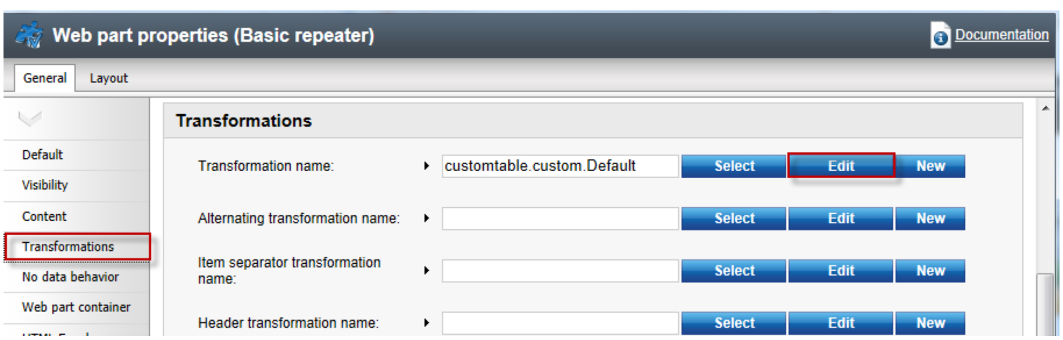


Lab 2-5: Editing the default Transformation

1. In the Design tab on the **BasicRepeater** web part select the **Configure** button as shown in the following screenshot.



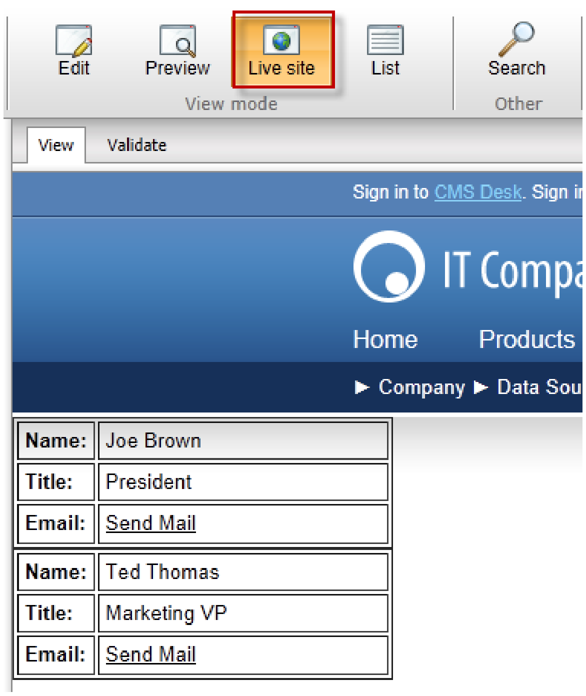
2. In the **Web part properties (Basic repeater)** screen select the **Transformation** tab, in the **Transformation name** field select the **Edit** button as shown in the following screenshot.



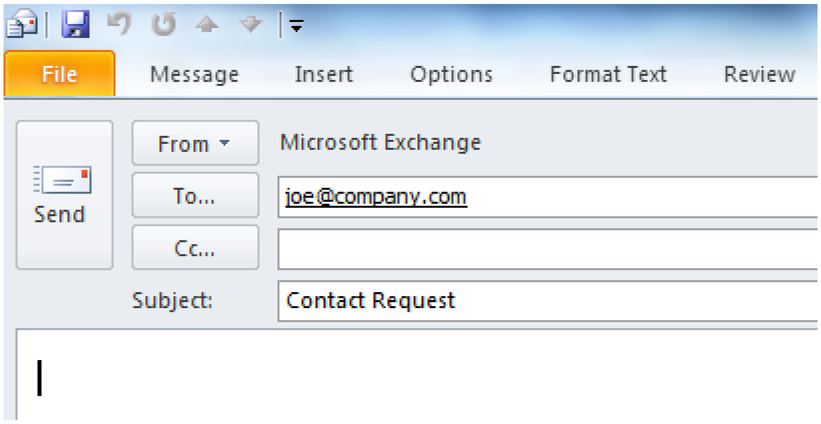
3. In the **Edit transformation** dialog within the **Code** window replace the existing code with the following, then select **Save & close**, and in the **Web part properties (basic repeater)** window click **OK.**

```
<table border = "1" cellpadding="4">
  <tr>
    <td><b>Name:</b></td>
    <td width="180"><%# Eval("Name") %></td>
  </tr>
  <tr>
    <td><b>Title:</b></td>
    <td><%# Eval("Title") %></td>
  </tr>
  <tr>
    <td><b>Email:</b></td>
    <td><a href="mailto:<%#
Eval("Email")%>?Subject=Contact%20Request">Send Mail</a></td>
  </tr>
  </table>
```

4. Select the **Live Site** button to view the edited transformation as shown in the following screenshot.

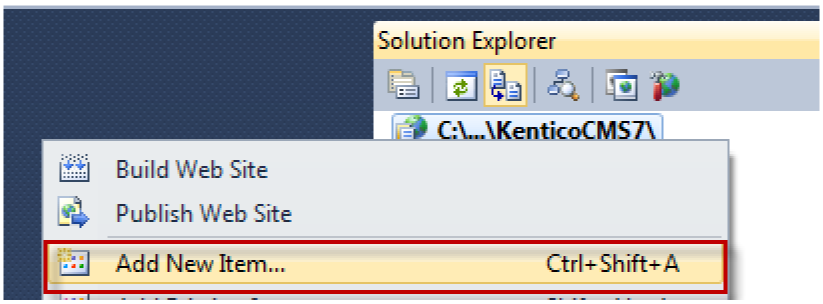


5. On the Live site click the **Send Mail** link for **Joe Brown** and validate that you see the email as shown below.

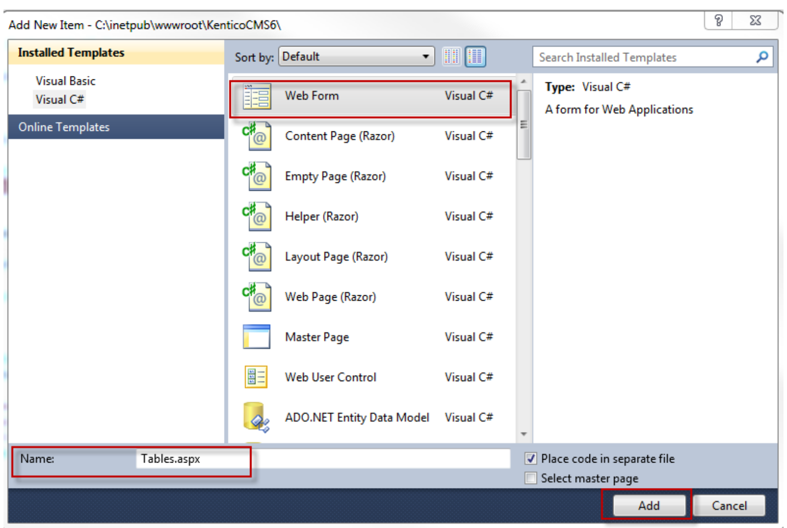


Lab 2-6: Adding custom table data with the API

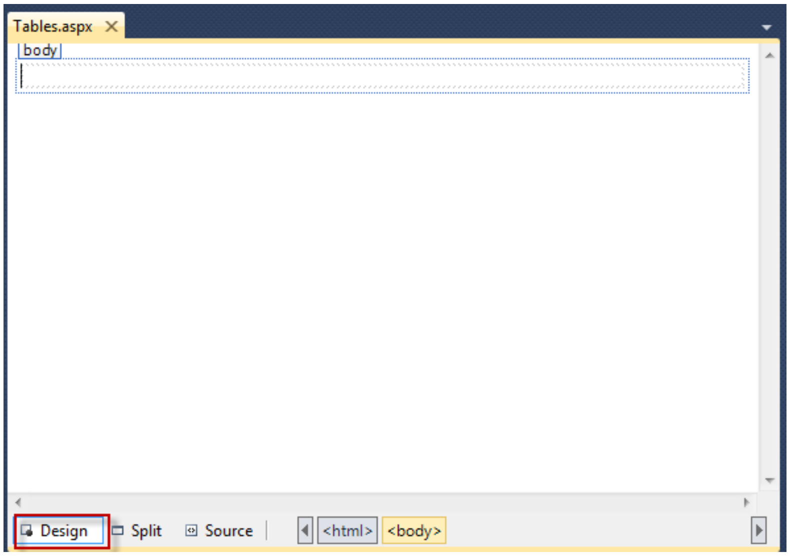
1. In Visual Studio open the Kentico CMS Web project in the **Solution Explorer** right click on the project root and select **Add new item** as shown in the following screenshot.



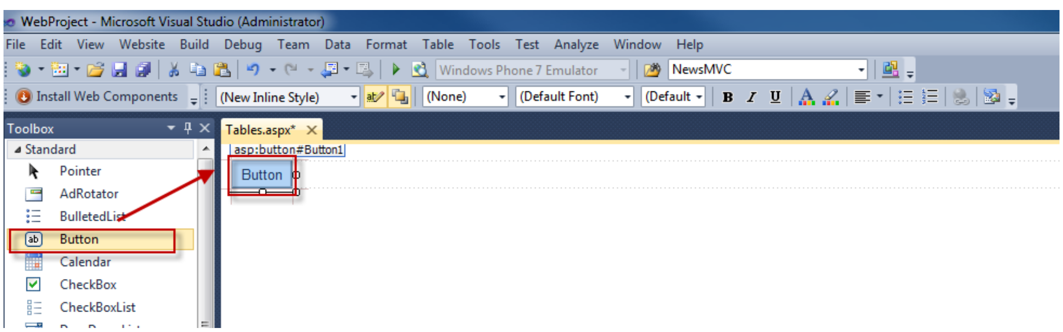
2. In the **Add new item** dialog select **Web form**, in the **Name** field enter **Tables.aspx**, and then click the **Add** button as shown in the following screenshot.



3. In the Tables.aspx form click the **Design** button as shown in the following screenshot.



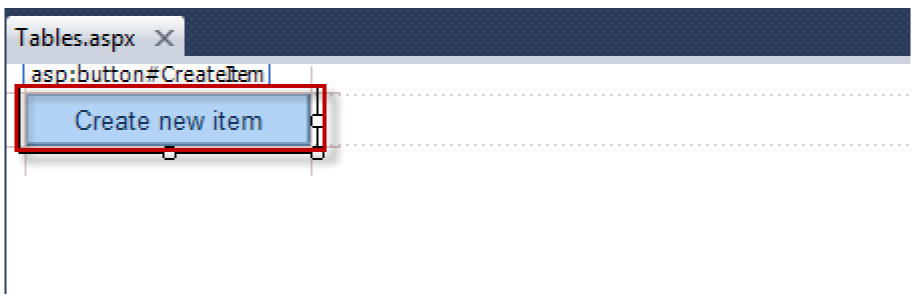
4. From the Toolbox drag the **Button** control onto **Tables.aspx** as shown in the following screenshot.



5. In the **Button1 Properties** window update the following fields

Field	Value
ID	**CreateItem**
Text	**Create new item**

6. On the Design tab double click the **Create new item** button as shown in the following screenshot.



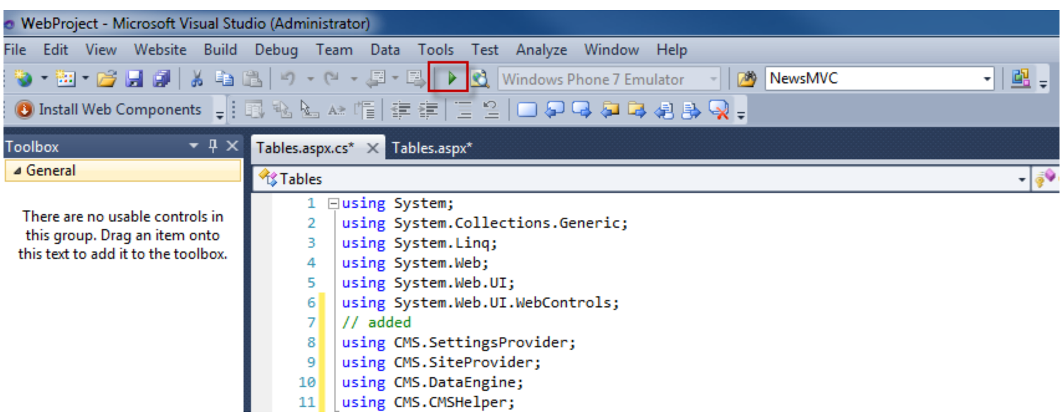
7. At the top of the Tables.aspx web form add the following **Using** statements.

```
using CMS.SettingsProvider;
using CMS.SiteProvider;
using CMS.DataEngine;
using CMS.CMSHelper;
```

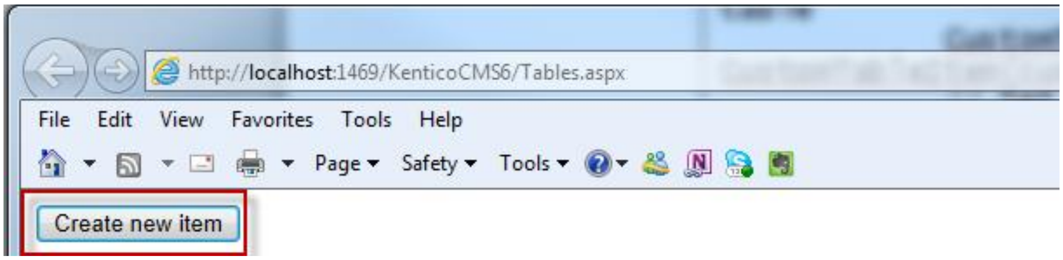
8. In the **Createitem_click** event replace any existing code with the following and then select **Save (CTRL+S).**

```
        CustomTableItemProvider ctiProvider = new
CustomTableItemProvider(CMSContext.CurrentUser);
        string customtablename = "customtable.custom";


        DataClassInfo customTableClassInfo =
DataClassInfoProvider.GetDataClass(customtablename);

        if (customTableClassInfo == null)
        {
            throw new Exception("table does not exist.");
        }
        else
        {
            // Create item
            CustomTableItem item =
CustomTableItem.New(customTableClassInfo.ClassName, ctiProvider);
            // Set values
            item.SetValue("Name", "Thom Robbins");
            item.SetValue("Email", "thomasr@kentico.com");
            item.SetValue("Title", "Dish washer");
            // Insert the item
            item.Insert();
          }
```

9. With Tables.aspx selected in the **Solution Explorer** press the **Start (Play)** button as shown in the following screenshot.

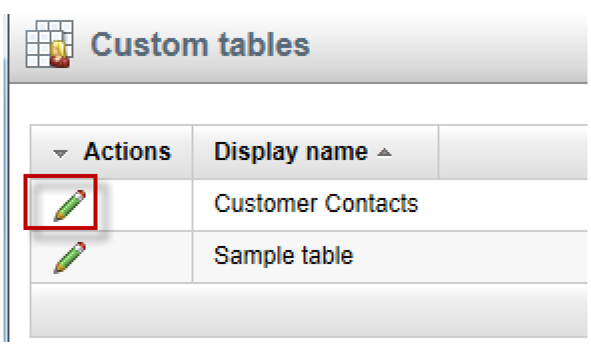


10. In the running application click the **Create new item** button as shown in the following screenshot.

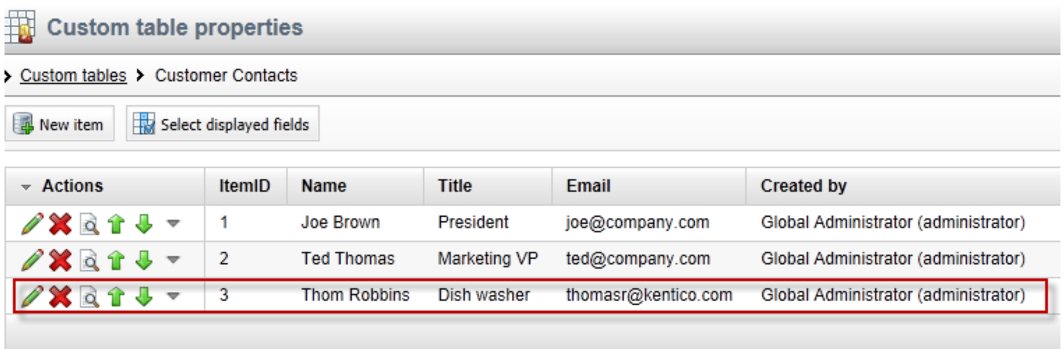


11. Log into CMS Desk then select the **Tools** tab and then select **Custom tables** as shown in the following screenshot.

12. In the Custom tables menu select the **Edit (Pencil)** icon for the **Customer Contacts** table as shown in the following screenshot.

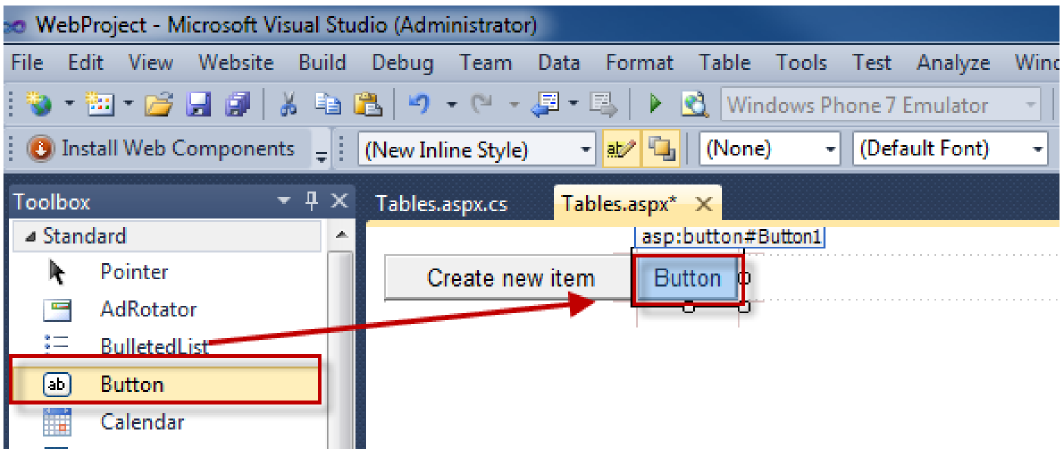


13. In the Custom table properties validate that the new custom table item is available as shown in the following screenshot.



Lab 2-7: Editing custom table data using the API

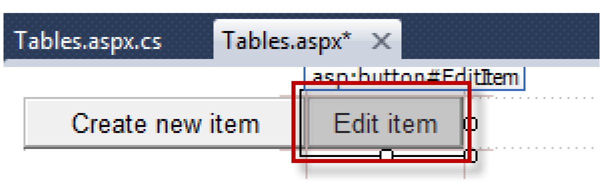
1. On the Tables. aspx form on the Design tab from the **Toolbox** drag a **Button** control onto the form as shown in the following screenshot.



2. In the **Button 1 Properties** update the following fields

Field	Value
ID	**EditItem**
Text	**Edit item**

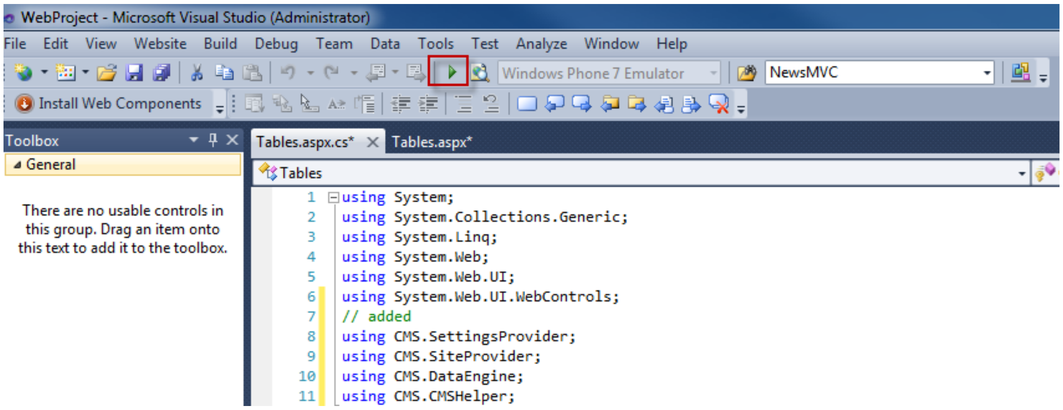
3. Double click the **Edit item** button as shown in the following screenshot.



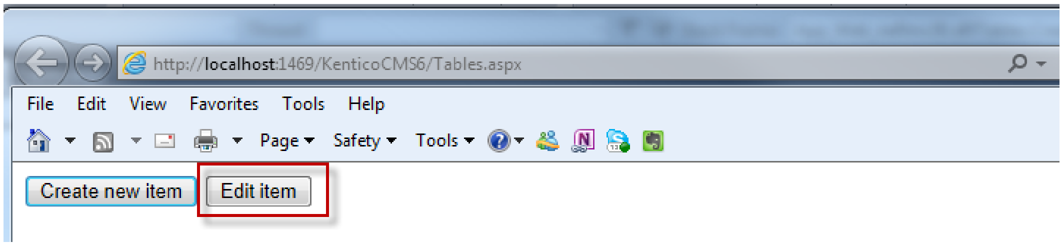
4. In the **EditItem_Click** event replace any code with the following and then select **Save (CTRL+S).**

```
  CustomTableItemProvider ctiProvider = new
CustomTableItemProvider(CMSContext.CurrentUser);
        string customtablename = "customtable.custom";


        DataClassInfo customTableClassInfo =
DataClassInfoProvider.GetDataClass(customtablename);

        if (customTableClassInfo == null)
        {
            throw new Exception("table does not exist.");
        }
        else
        {
            // Provide ID of item you want to edit
            int itemId = 5;
            // Get custom table item with given ID
            CustomTableItem item = ctiProvider.GetItem(itemId,
customTableClassInfo.ClassName);
            // Set value of the custom table item field
            item.SetValue("Name", "Frank Jones");
            // Update item
            item.Update();
        }
```

5. With Tables.aspx selected in the **Solution Explorer** press **Start (Play)** as shown in the following screenshot.

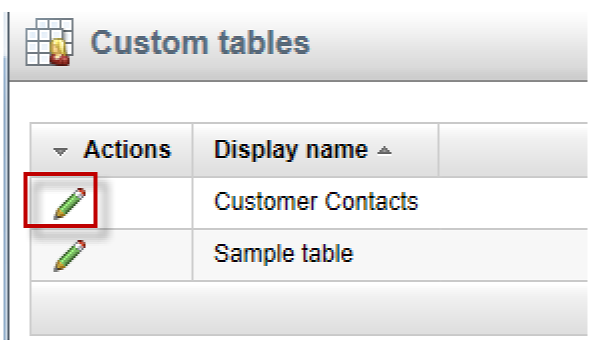


6. In the running application click the **Edit item** button as shown in the following screenshot.

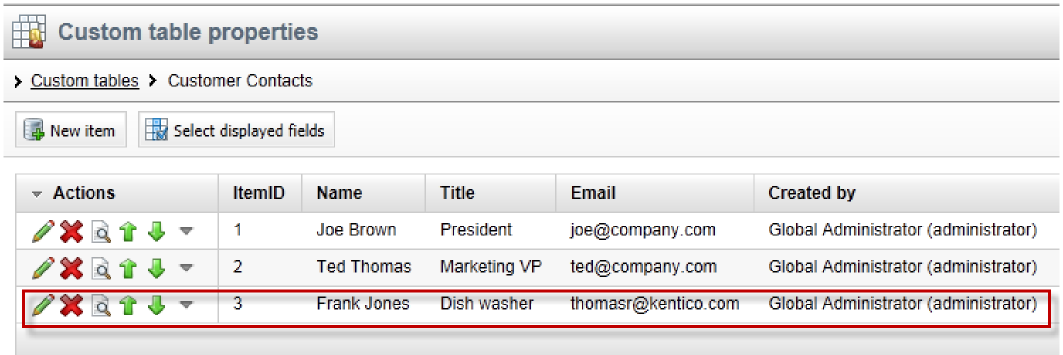


7. Log into CMS Desk then select the **Tools** tab and then select **Custom tables** as shown in the following screenshot.

8. In the Custom tables menu select the **Edit (Pencil)** icon for the **Customer Contacts** table as shown in the following screenshot.



9. In the Custom table properties validate that the **Name** field contains **Frank Jones** as shown in the following screenshot.



Summary

In this set of Hands on Labs we looked at how to create a custom table and then display the data using the Basic Repeater web part. We also looked at how we can edit the default transformation and use the Kentico CMS API. Specifically, we covered the following.

- Creating a custom table
- Adding data to a custom data using CMS Site manager
- Creating a new CMS page
- Using Data source web parts
- Displaying data with the Basic repeater web part
- Editing the default transformation
- Adding items using the API
- Editing items using the API

Key Resources:

- http://devnet.kentico.com/Documentation.aspx
- http://devnet.kentico.com/Videos/Content-Management/How-To--Using-Data-Source-Web-Parts.aspx

Hands on Lab 3:
Integrating Twitter with Kentico CMS

Lab Overview

System Requirements:

- Kentico CMS 7 installed with the Sample Corporate Site
- Active Twitter account

Intended Lab Audience:

- Content Administrators
- CMS Designers

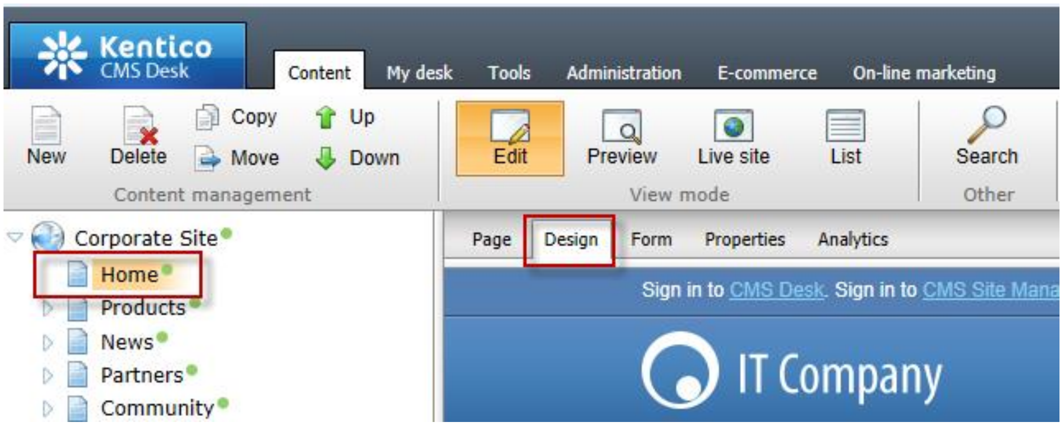
Lab Introduction

Technically, Twitter is a micro blogging platform that limits real time comments (tweets) to 140 characters. What may seem like a simple technology has become a worldwide phenomenon with a projected 200 million active users. Leveraging this platform many companies are looking to Twitter as a key part of their integrated marketing campaigns and a key source of real time customer connections. With an extensive and well documented API, Twitter looks to make site integration as easy as possible. In this lab, we will add Twitter functionality to the Kentico Corporate sample site. This will enable site users to tweet and engage about the things they find on your site and enable site owners and administrators to extend their reach. In completing this set of labs you will perform the following tasks:

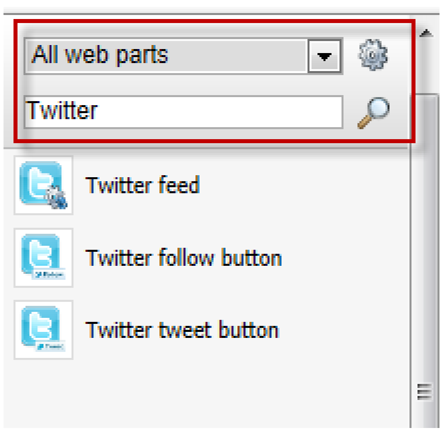
- Add the Twitter feed web part
- Add the Twitter follow button web part
- Add the Twitter tweet button web part
- Update the Home page template

Lab 3-1: Twitter feed web part

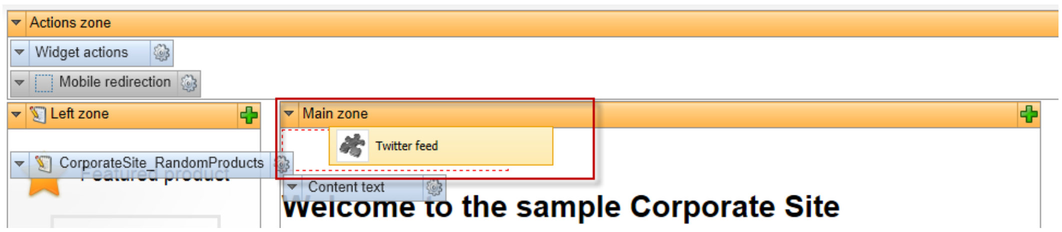
1. Log into **CMS Desk** as **Administrator**, in the Content tree select the **Home** page, and then select the **Design** tab as shown in the following screenshot.



2. In the web part toolbar with **All web parts** selected enter **Twitter**, then click the **Search (magnify)** button as shown in the following screenshot.



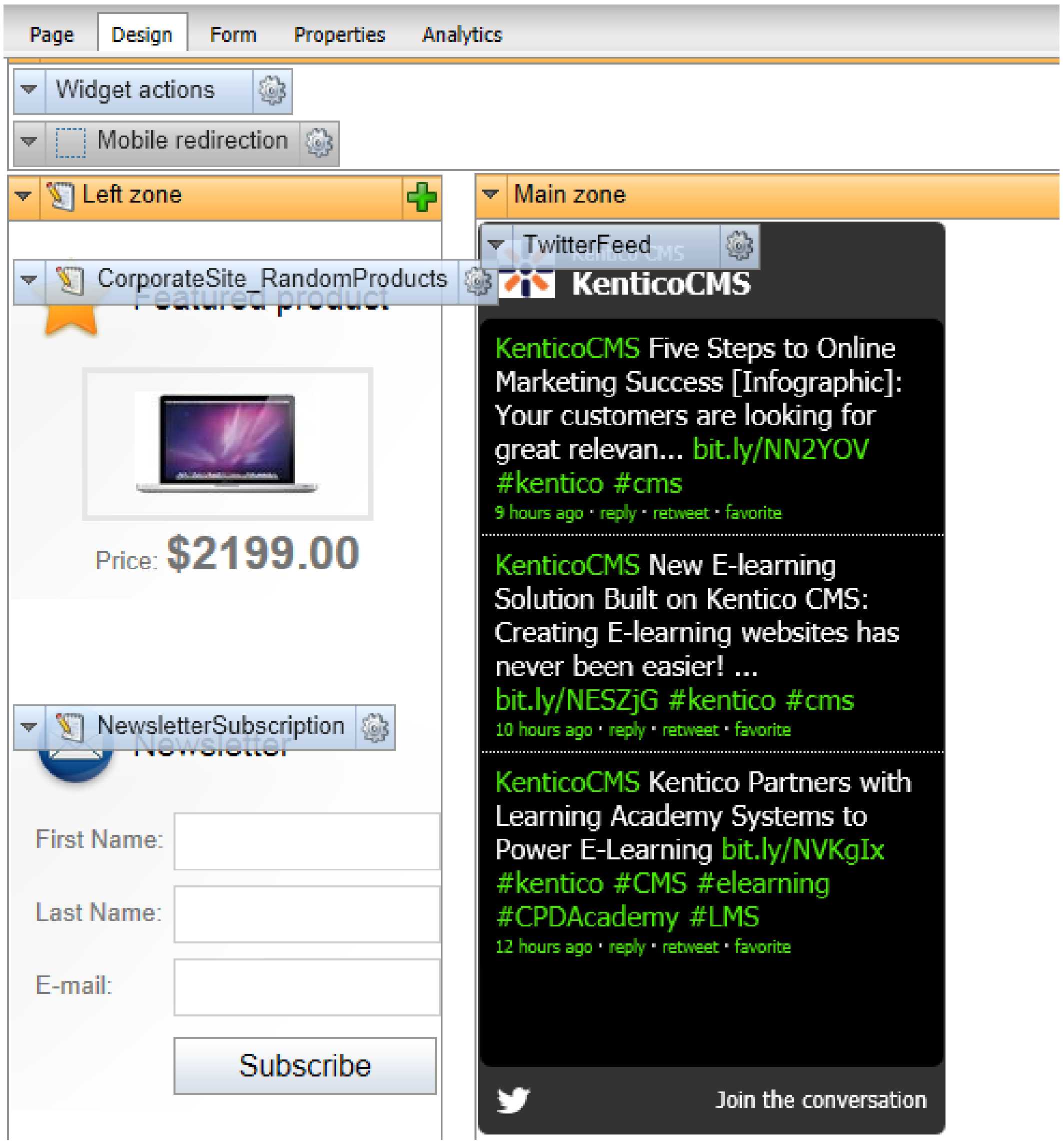
3. From the Web part toolbar drag the **Twitter feed** web part into the **Main zone** web part zone as shown in the following screenshot.



4. In the **Web part properties (Twitter feed)** update the following fields and then select **Ok**.

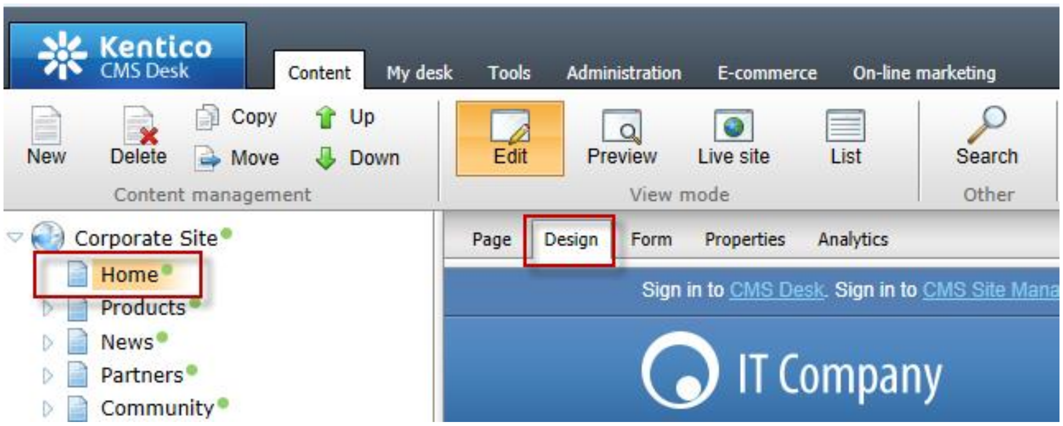
Tab	Field	Value
General	**User name**	**Your company twitter name**
General	**Number of tweets**	**3**
General	**Poll for new results**	**Checked**

5. In the Design tab validate that you see the **TwitterFeed** web part as shown in the following screenshot.

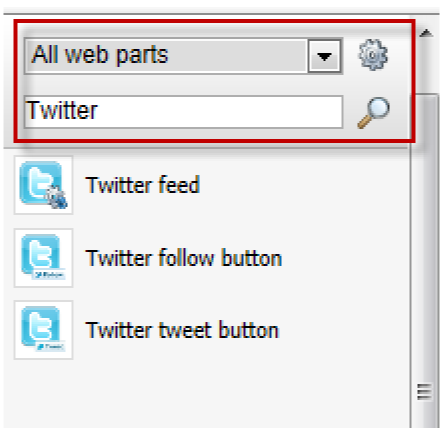


Lab 3-2: Twitter follow button web part

1. Log into **CMS Desk** as **Administrator**, in the Content tree select the **Home** page, and then select the **Design** tab as shown in the following screenshot.



2. In the web part toolbar with **All web parts** selected enter **Twitter**, then click the **Search (magnify)** button as shown in the following screenshot.



3. From the Web part toolbar drag the **Twitter follow button** web part into the **Main zone** web part zone as shown in the following screenshot.

4. In the **Web part properties (Twitter follow button)** update the following fields and then select **Ok.**

Tab	Field	Value
General	**User to follow**	**Your company twitter name**
Design	**Display followers count**	**Checked**
Design	**Show screen name**	**Checked**

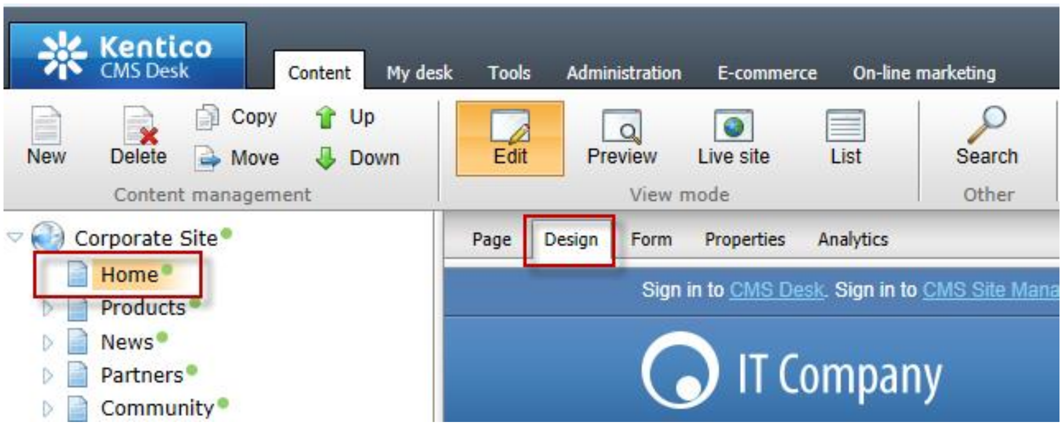
5. In the Design tab validate that you see the **TwitterFollowButton** as shown in the following screenshot.

6. In the View mode panel select the **Live site** button, and then click the **Follow @kenticoCMS** button as shown in the following screenshot

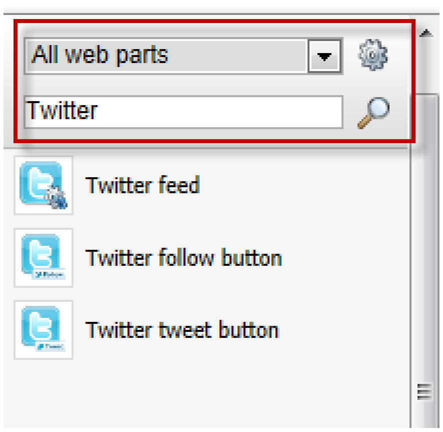
7. Validate that you receive the Twitter screen as shown in the following screenshot.

Lab3-3: Twitter tweet button web part

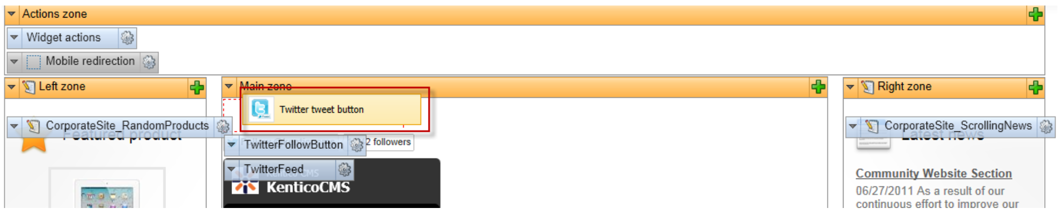
1. Log into **CMS Desk** as **Administrator**, in the Content tree select the **Home** page, and then select the **Design** tab as shown in the following screenshot.



2. In the web part toolbar with **All web parts** selected enter **Twitter**, then click the **Search (magnify)** button as shown in the following screenshot.



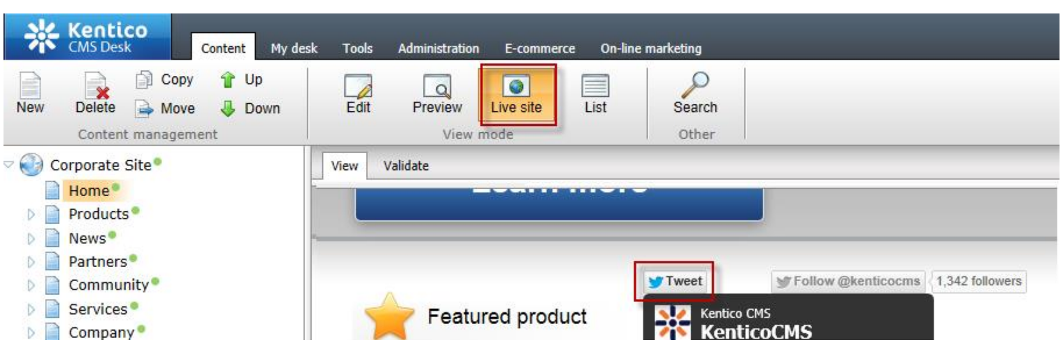
3. From the Web part toolbar drag the **Twitter tweet button** web part into the **Main zone** web part zone as shown in the following screenshot.



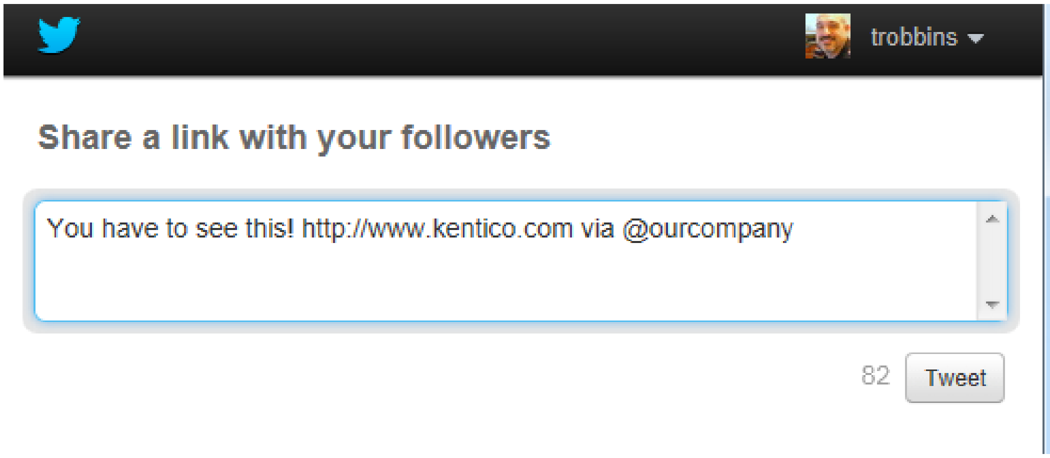
4. In the **Web part properties (Twitter tweet button)** update the following fields and then select **Ok**

Tab	Field	Value
General	**Type**	**Share a link**
General	**Default tweet text**	**You have to see this**
General	**Via**	**ourcompany**
Share a link	**URL to share**	**http://www.kentico.com**

5. In the View mode panel click the **Live site** button, and then click the **tweet** button as shown in the following screenshot.

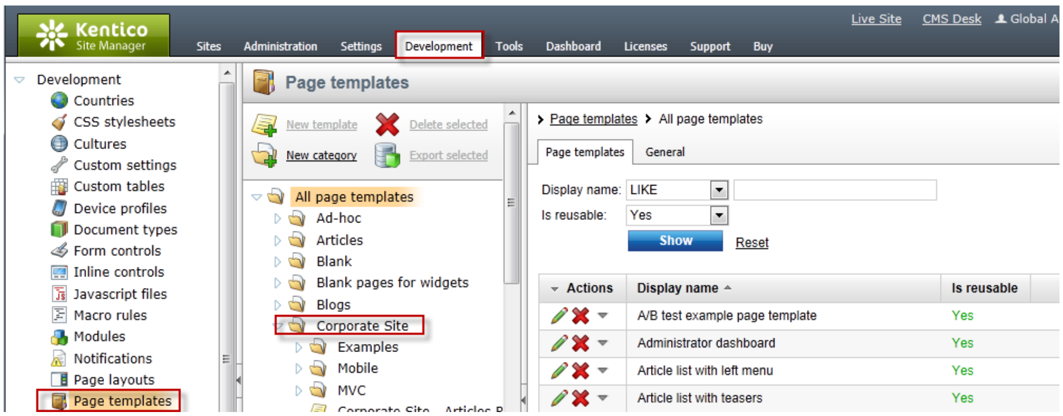


6. Validate that you see the Twitter **Share a link with your followers** screen as shown in the following screenshot.

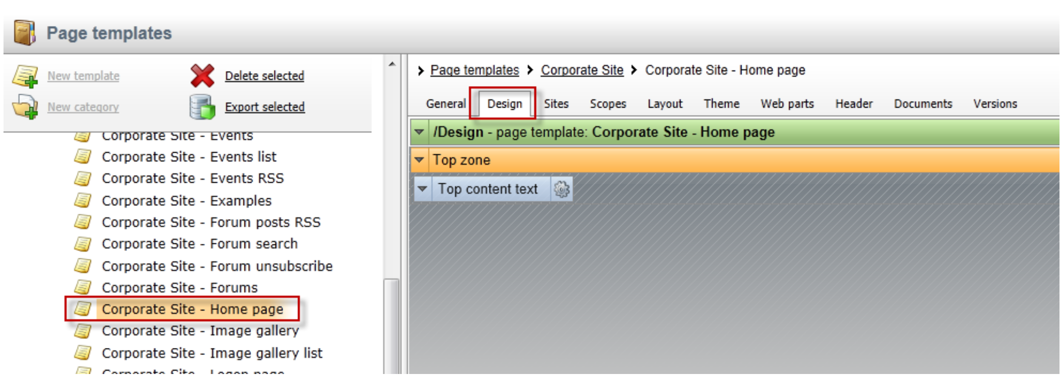


Lab 3-4: Update the Home page template

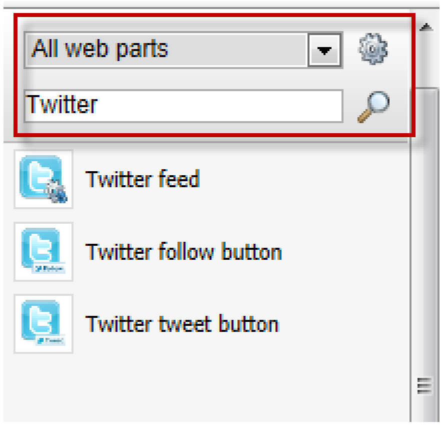
1. Log into **CMS Site Manager** as **Administrator**, select the **Development** tab, then click **Page templates**, in the **Page templates** list then expand **Corporate Site** as shown in the following screenshot.



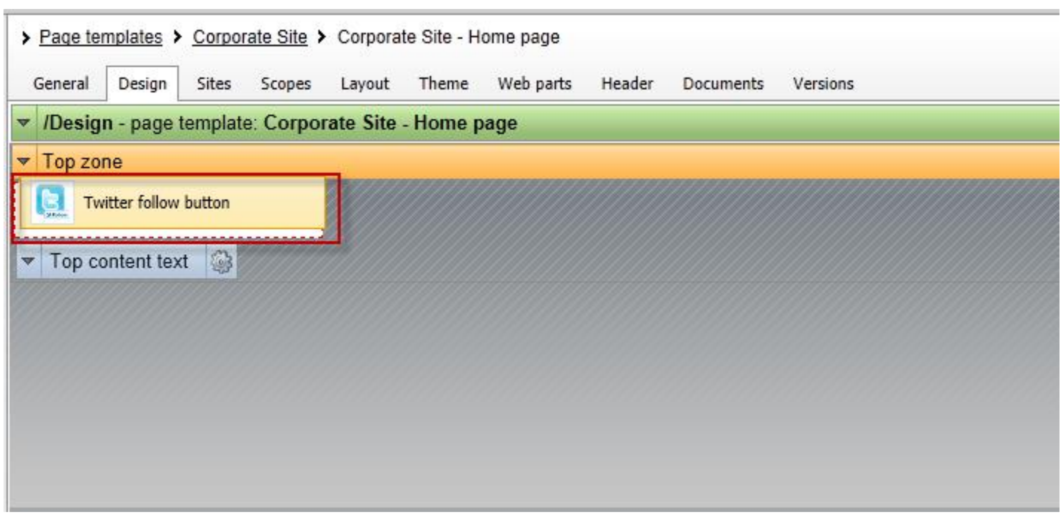
2. In the **Corporate Site** page template list select the **Corporate Site – Home page** template and then click the **Design** tab as shown in the following screenshot.



3. In the web part toolbar with **All web parts** selected enter **Twitter**, then click the **Search (magnify)** button as shown in the following screenshot.



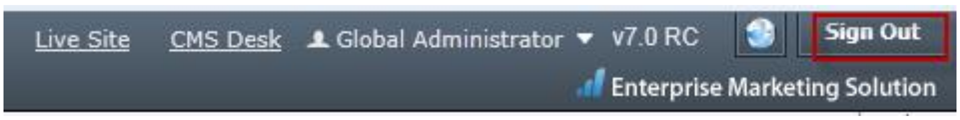
4. From the Web part toolbar drag the **Twitter follow button** web part into the **Top zone** web part zone as shown in the following screenshot.



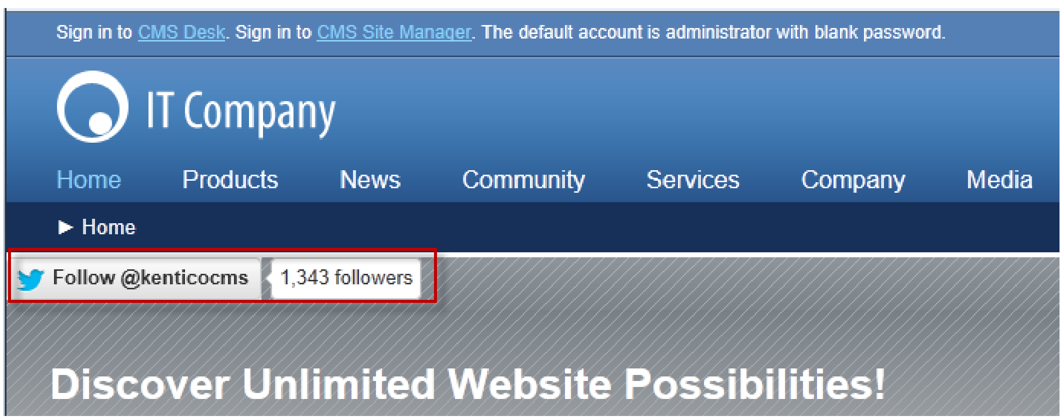
5. In the **Web part properties (Twitter follow button)** update the following fields and then select **Ok**.

Tab	Field	Value
General	**User to follow**	**Kenticocms**
Design	**Display followers count**	**Checked**
Design	**Shown screen name**	**Checked**
Design	**Size**	**Large**

6. In the upper right select the **Sign out** button as shown in the following screenshot



7. On the Live site validate that you see the **Follow @kenticocms** as shown in the following screenshot.



Summary

In this set of Hands on Labs we have looked at how we can add Twitter support using both a Static text web part and page template. Specifically we covered the following.

- Add the Twitter feed web part
- Add the Twitter follow button web part
- Add the Twitter tweet button web part
- Update the Home page template

Key Resources:

- Feature Series: Twitter web parts
- http://twitter.com/about/resources

Hands on lab 4:
UI Personalization

Lab Overview

System Requirements:

- Kentico CMS 7 installed with the Sample Corporate Site

Intended Lab Audience:

- CMS Designers
- CMS Developers
- Content Administrators

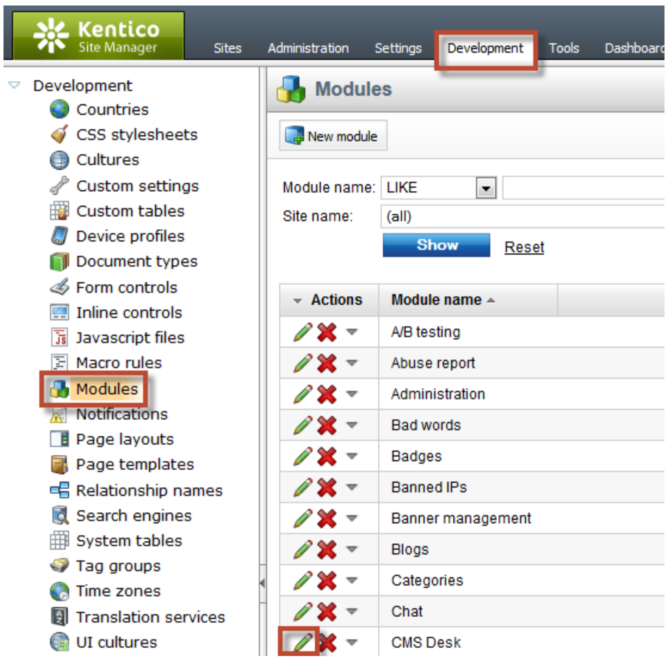
Lab Introduction

UI personalization enables the creation of simplified interfaces with CMS Desk. This will decrease the learning curve, remove unnecessary features and enable users to focus on areas of the system they really need. In completing this set of labs you will perform the following tasks:

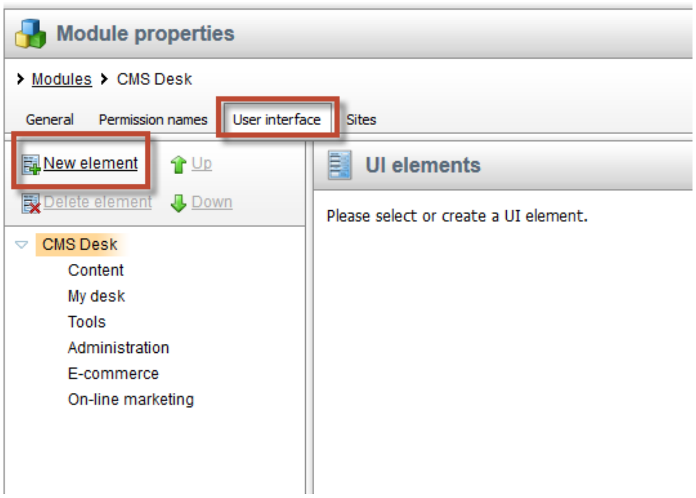
- Explore CMS Desk
- Add a new tab to CMS Desk

Lab 4-1: Adding a new tab to CMS Desk

1. Log into **CMS Site Manager** as **Administrator**, select the **Development** tab, then click **Modules** and then click the **Edit (Pencil)** icon for **CMS Desk** as shown in the following screenshot.



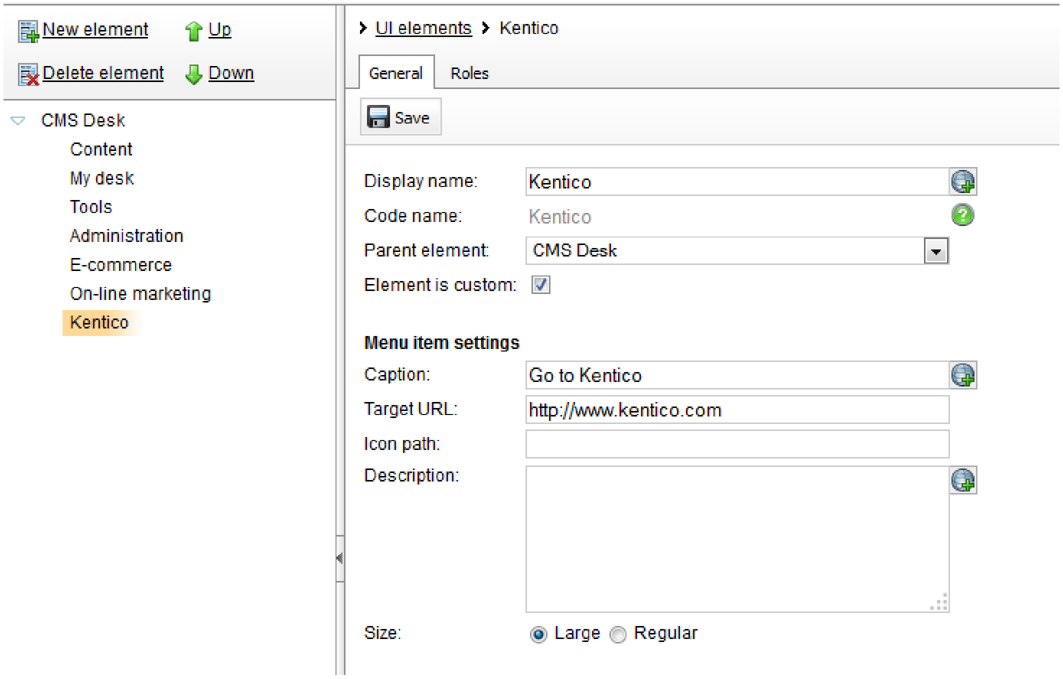
2. In the Modules screen switch to the **User interface** tab and then click the **New element** button as shown in the following screenshot.



3. In the New element screen update the following fields and then select **Save**.

Field	Value
Display name	**Kentico**
Element is custom	**Checked (True)**
Caption	**Go to Kentico**
Target URL	**http://www.kentico.com**

4. Validate that you see the updates as shown in the following screenshot.



5. Log into CMS Desk as Administrator click the Go to Kentico tab as shown in the following screenshot.

Summary

In this set of Hands on Labs we have looked at how to create UI personalization. Specifically we covered the following.

- Looked at UI personalization
- Added a new tab to CMS Desk

Key Resources:

- UI Personalization overview

Hands on Lab 5:
Integrating Facebook with Kentico CMS

Lab Overview

System Requirements:

- Kentico CMS 7 installed with the Sample Corporate Site
- Active Facebook account

Intended Lab Audience:

- CMS Designers
- CMS Developers
- Content Administrators

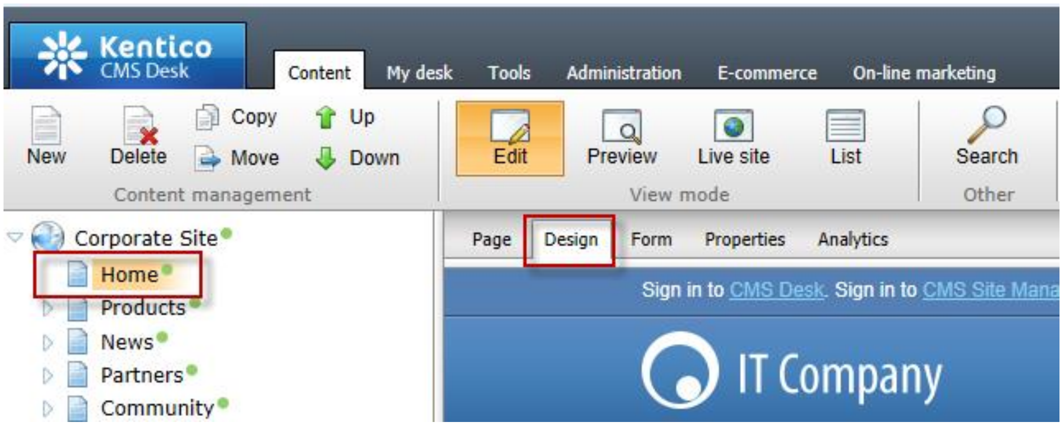
Lab Introduction

Facebook has become an internet marketing sensation, with third party estimates of almost 200 million users and reports that almost two thirds of these log in daily. For many marketers, Facebook has become an essential ingredient for online and integrated marketing campaigns. Facebook provides marketers and web site owner’s paid advertising models that include user profiling, targeted advertisements, community collaboration and networking opportunities. Non paid opportunities enable marketers and web site owner’s the opportunity for their customers to discuss, share and recommend content and products with their social network. Both provide an opportunity for companies to build their brand, extend reach and collaborate with customers. Facebook provides an extensive API that any website owner can leverage. In this lab, we will add Facebook functionality to the Kentico Corporate sample site. In completing this set of labs you will perform the following tasks:

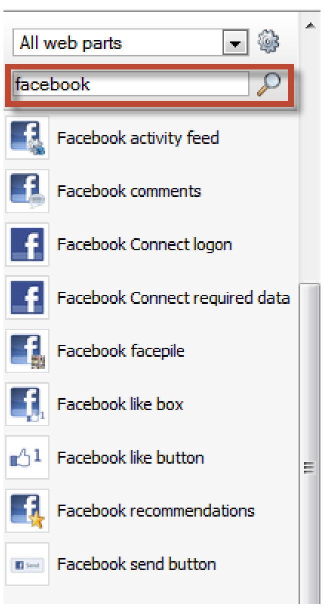
- Add a Facebook recommendations web part

Lab 5-1: Adding a Facebook Recommendations web part

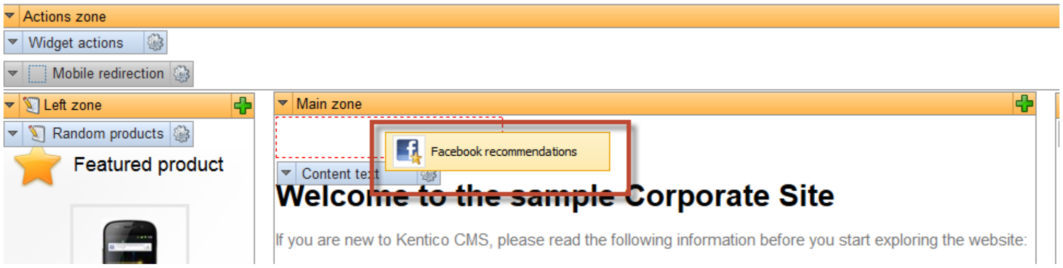
1. Log into **CMS Desk** as **Administrator**, in the Content tree select the **Home** page, and then select the **Design** tab as shown in the following screenshot.



2. In the web part toolbar with **All web parts** selected enter **Facebook**, then click the **Search (magnify)** button as shown in the following screenshot.

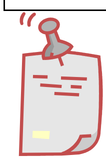


3. From the Web part toolbar drag the **Facebook recomendations** web part into the **Main zone** web part zone as shown in the following screenshot.



4. In the **Web part properties (Facebook recommendations)** update the following fields and then select **Ok**.

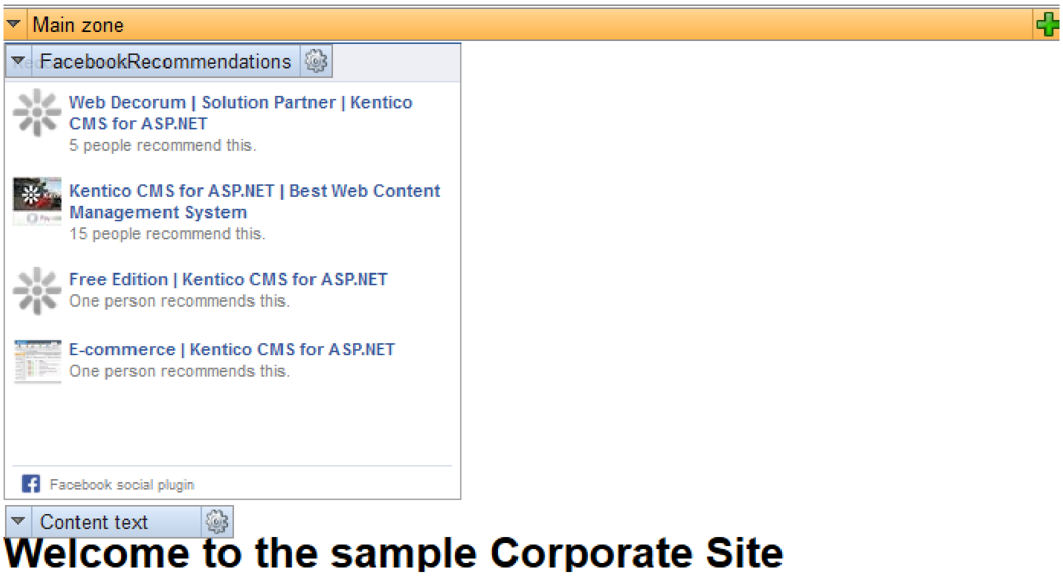
Tab	Field	Value
Settings	**Doman**	**http://www.kentico.com**



Facebook recommendations web part

This will evaluate the current logged in user against the http://www.kentico.com domain.

5. In the Design tab validate that you see the **Facebook recomendations** web part as shown in the following screenshot.



Summary

In this Hands on Lab we have looked at how to use the built in web parts included with Kentico CMS. Specifically we covered the following.

- Identifying the Facebook web parts
- Implementing the Facebook recommendations button

Hands on Lab 6:
Auto-posting to Social Media with Advanced Workflow

Lab Overview

System Requirements:

- Kentico CMS 7 installed with the Sample Corporate Site
- Active Twitter Account
- Active bit.ly account

Intended Lab Audience:

- CMS Designers
- CMS Developers
- Content Administrators

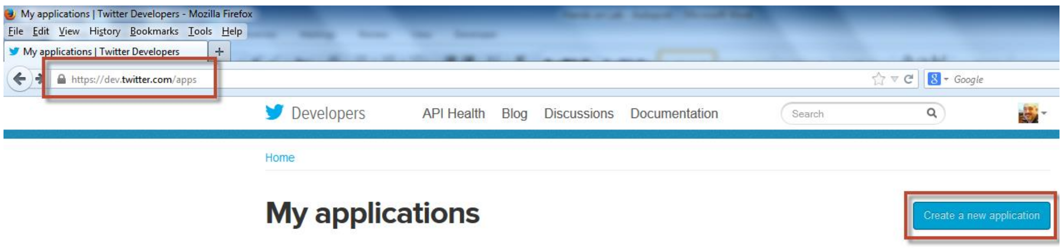
Lab Introduction

Social media has become an incredibly important part of any marketing campaign. The problem is that using social media can take a lot of time. For marketers this is often a luxury that is not available. Using a combination of social media integration and Advanced workflow with Kentico you are able to auto post to your social media accounts when a new document is published. In this lab we will create a new Advanced workflow using the Kentico corporate site that auto posts to Twitter when a new blog post is published. In completing this set of labs you will perform the following tasks.

- Understand what is needed to integrate Twitter and bit.ly with Kentico
- Setup social media integration with Kentico
- Create a new Advanced workflow
- Create a new workflow step that publishes to Twitter
- Set a workflow scope for blogs

Lab 6-1: Create the Twitter application

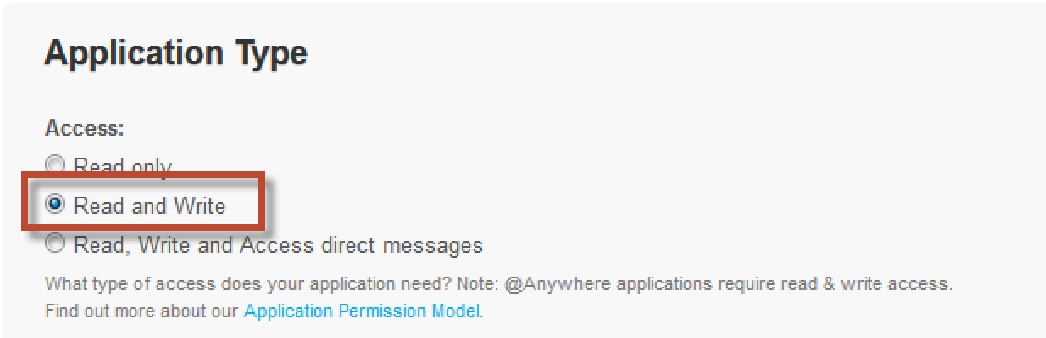
1. Open a browser window and with your Twitter account log into https://dev.twitter.com/apps and then select **Create a new application** as shown in the following screenshot.



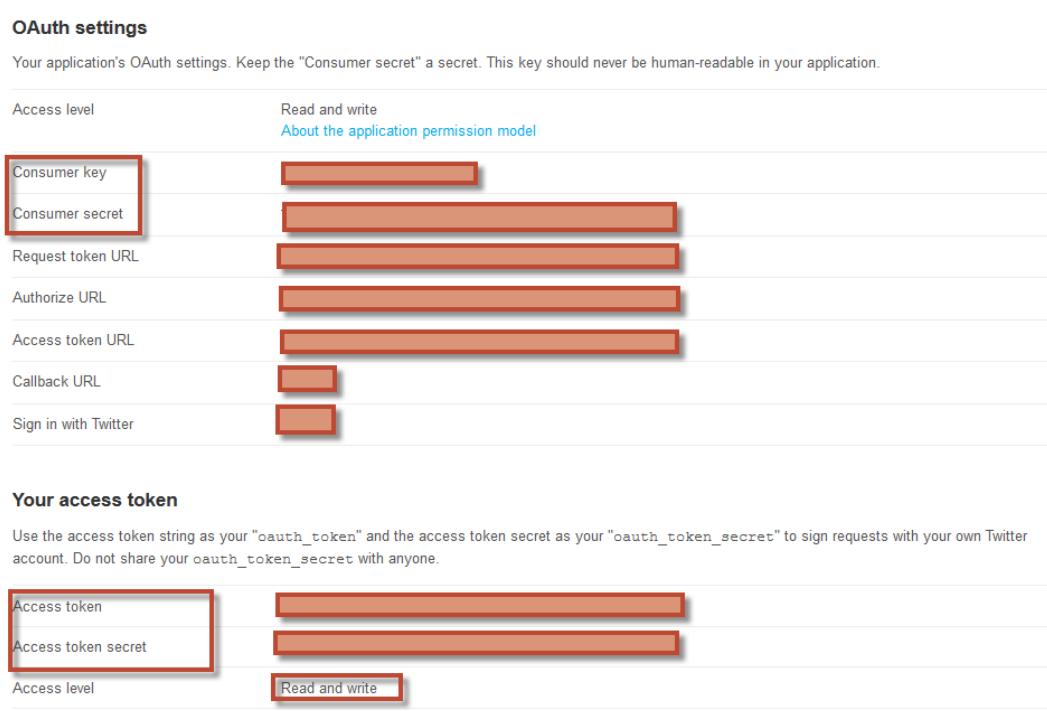
2. In the **Create new application** screen update the following fields and then click the **Create your Twitter application**.

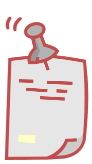
Field	Value
Name	**Name of your website**
Description	**Description of your website**
Website	**URL of your website**

3. Click the name of the application just created, then click the **Setting** tab, and in the **Application type** section select **Read and write** as shown in the following screenshot and then click the **Update this Twitter application's settings**.



4. Select the **Details** tab and write down the **Consumer key**, **Consumer secret**, **Access token**, **Access token secret** as shown in the following screenshot.



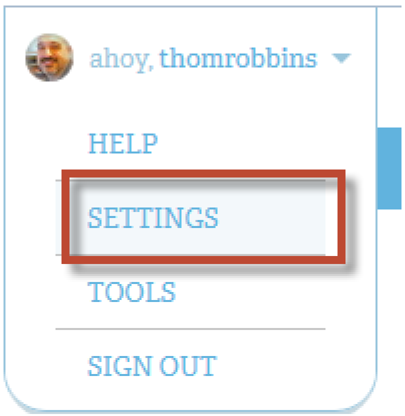


Why write it down?

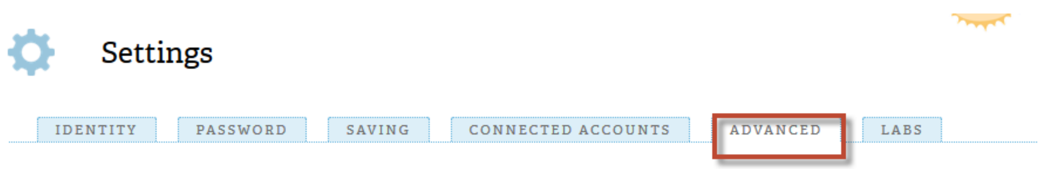
This information will be used later in the lab as the basis for integration for Kentico.

Lab 6-2: Collect your bit.ly information

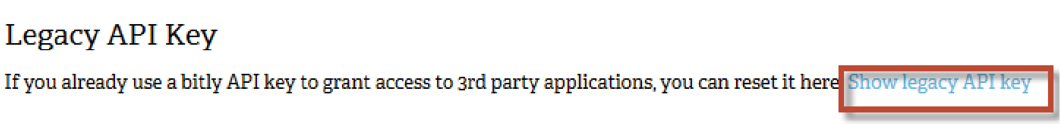
1. Log into bit.ly with your account, and in the dropdown select **Settings** as shown in the following screenshot.



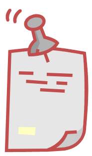
2. In the Settings screen select the **Advanced** tab as shown in the following screenshot.



3. At the bottom of the screen in the **Legacy API Key** section click the **Show legacy API key** as shown in the following screenshot.



4. Write down the **Login** and **API key** as shown in the following screenshot.

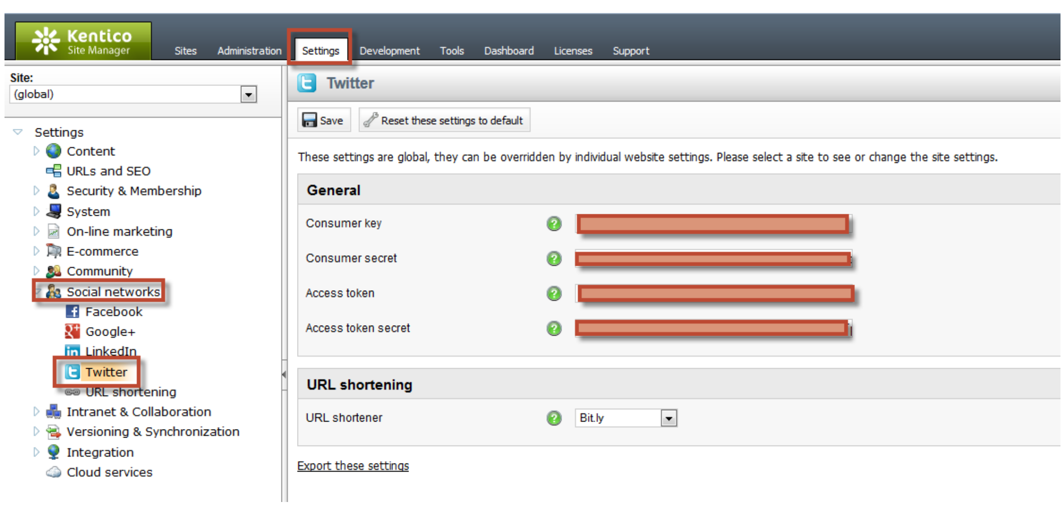


Why write it down?

This information will be used later in the lab for integration with Kentico.

Lab 6-3: Setup social media integration with Kentico CMS

1. Log into **Site Manager** as Administrator, click the **Settings** tab, in the left pane tree view expand the **Social networks** node and then click **Twitter** as shown in the following screenshot.



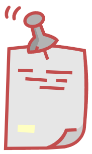
2. In the **Twitter tab** update the following fields and then click **Save**.

Field	Value
Consumer key	**Created in Lab 1**
Consumer secret	**Created in Lab 1**
Access token	**Created in Lab 1**
Access token URL	**Created in Lab 1**
URL shortener	**Bit.ly**

3. In the **Social networks** node select **URL shortening** as shown in the following screenshot.

4. In the URL shortening tab update the following fields and then select Save as shown in the following screenshot.

Field	Value
Login	**Created in Lab 2**
API Key	**Created in Lab 2**

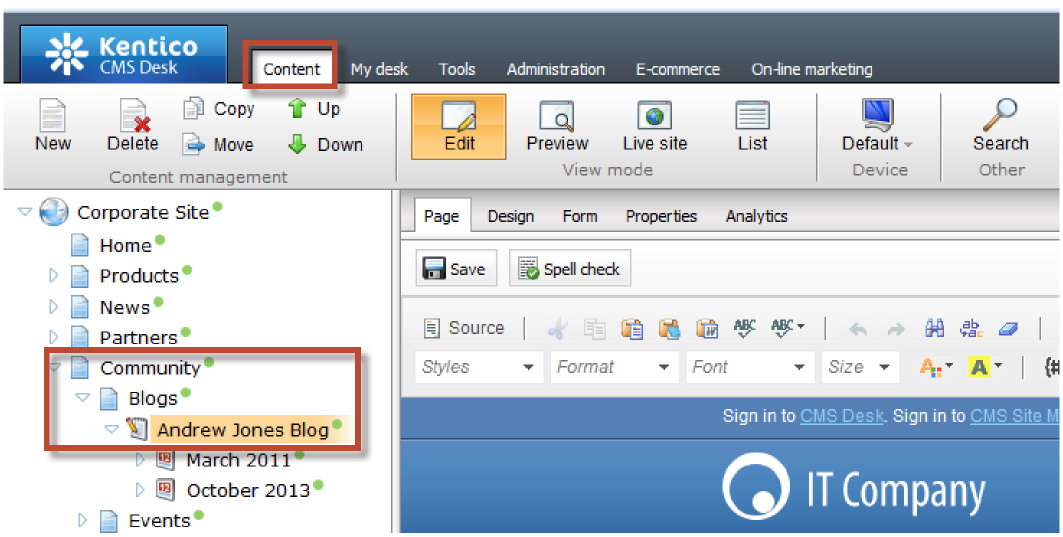


Why write it down?

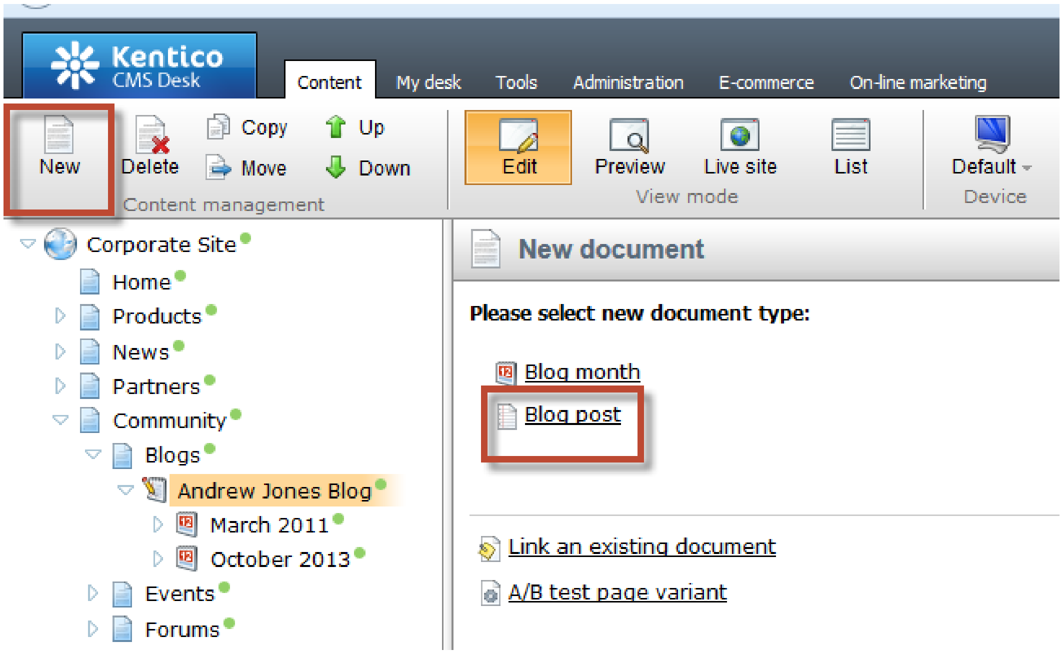
This information will be used later in the lab for integration with Kentico.

Lab 6-4: Testing social media integration

1. Log into CMS Desk select the **Content** tab, in the Content tree expand **Community**, then **Blogs** and then **Andrew Jones Blog** as shown in the following screenshot.



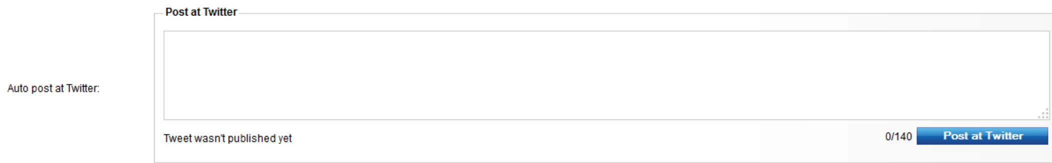
2. In the Content management tab select **New** and then **Blog Post** as shown in the following screenshot.



3. In the New blog post screen update the following fields and then select **Save**.

Field	Value
Post title	**Test post – please ignore**
Post summary	**Test post that we will send to twitter**
Post text	**An example of using the integration with twitter**

4. At the bottom of the new blog post confirm that you see the **Post at Twitter** box as shown in the following screenshot.

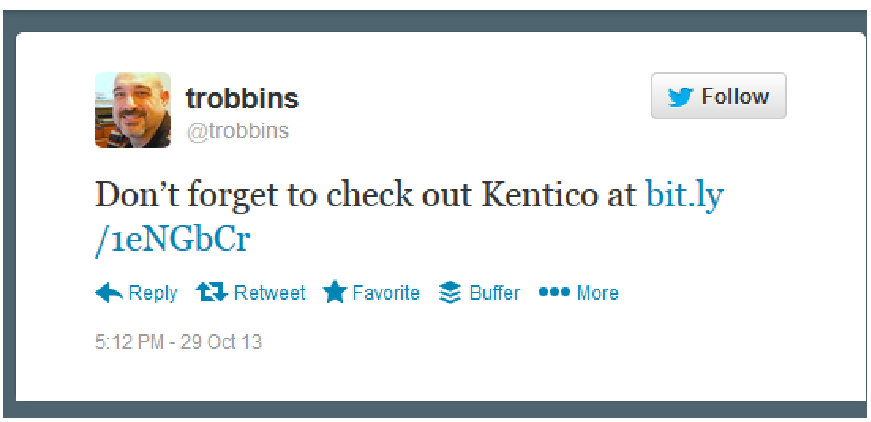


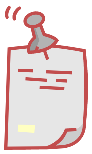
5. In the **Post at Twitter** box update the following fields and then click Post at Twitter.

Field	Value
Auto post at Twitter	**Don't forget to check out Kentico at http://www.kentico.com**

6. Confirm that you see the success message and then click the Tweet URL as shown in the following screenshot.

7. Validate that you see the Tweet and the shortened URL as shown in the following screenshot.



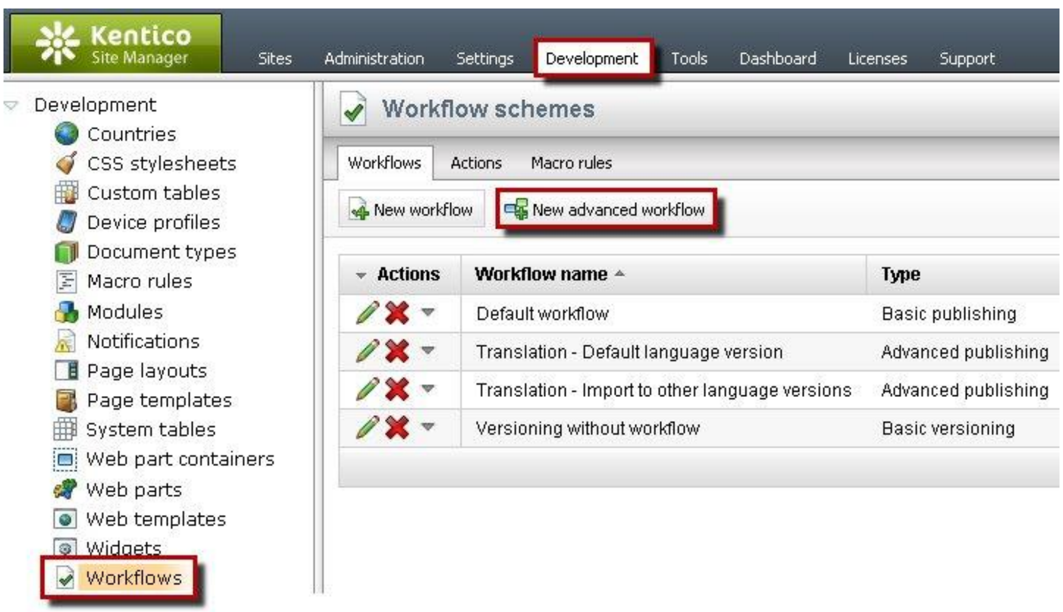


What am I looking at?

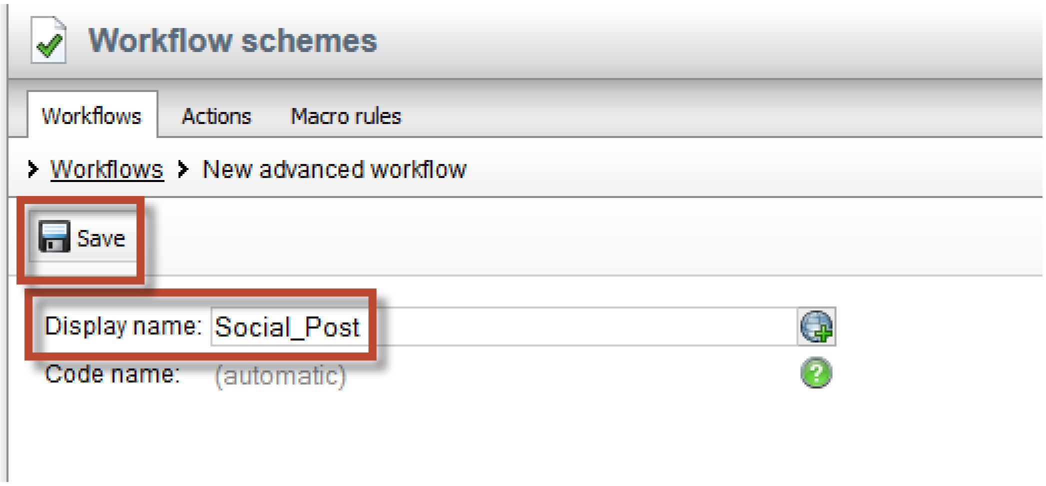
You have successfully tested the Twitter and URL shortening integration with Kentico.

Lab 6-5: Setting up the advanced workflow

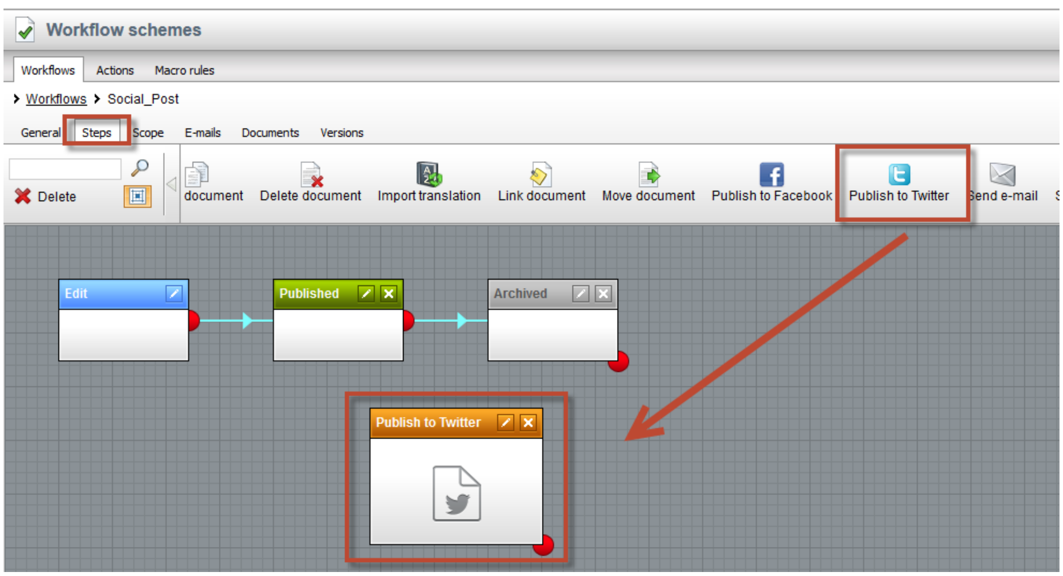
1. Log into **Site Manager** as Administrator, click the **Development** tab, in the left pane tree view, click **Workflows**, and in the right pane, click **New advanced workflow** as shown in the following screenshot.



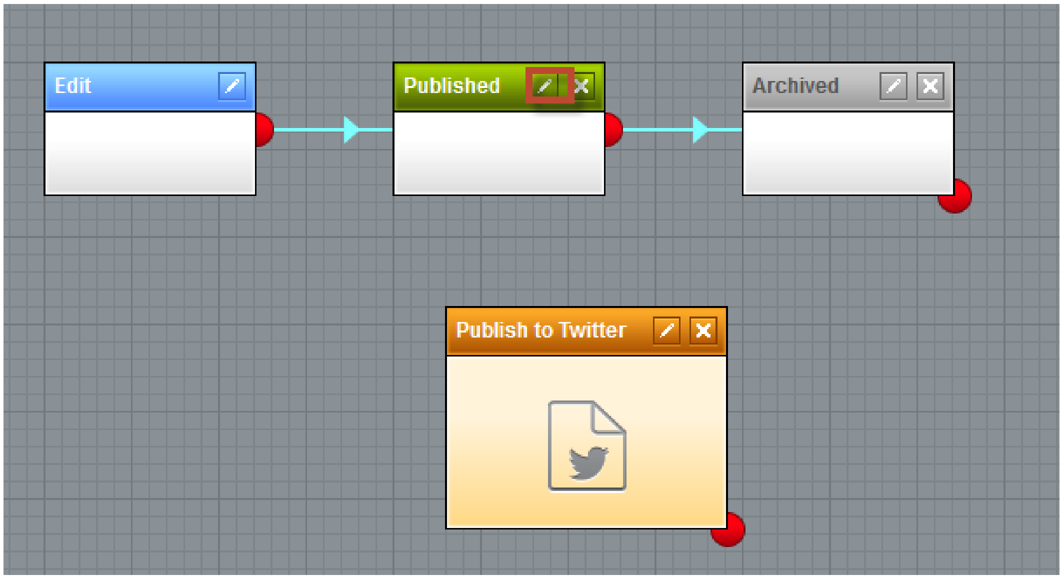
2. On the **Workflow schemes** page, in the **Display name** box, type ***Social_Post***, and then click **Save** as shown in the following screenshot.



3. Click the **Steps** tab, and drag the **Publish to Twitter** step onto the design surface as shown in the following screenshot.

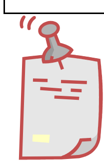


4. On the design surface in the **Published** step select the **Edit (Pencil)** icon as shown in the following screenshot.



5. In the **Workflow step properties** screen update the following fields, then select **Save** and then click **Close**.

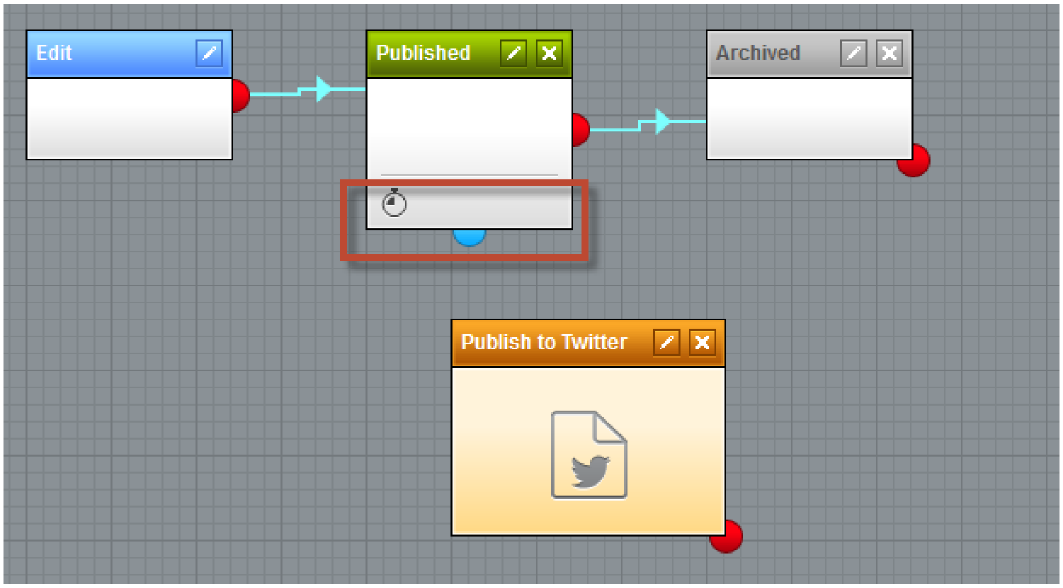
Section	Field	Value
Timeout settings	**Specific interval**	**Selected**
Timeout settings	**After**	**1 minute**
Timeout settings	**Leave through**	**Source point 'timeout'**



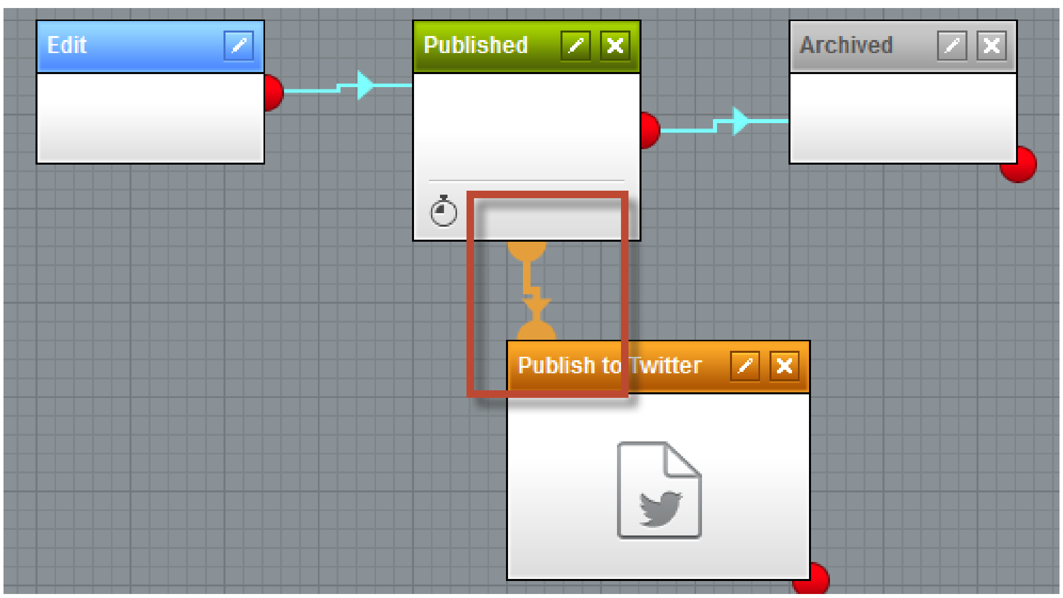
What am I looking at?

This will create a timer that will fire 1 minute after the document is published.

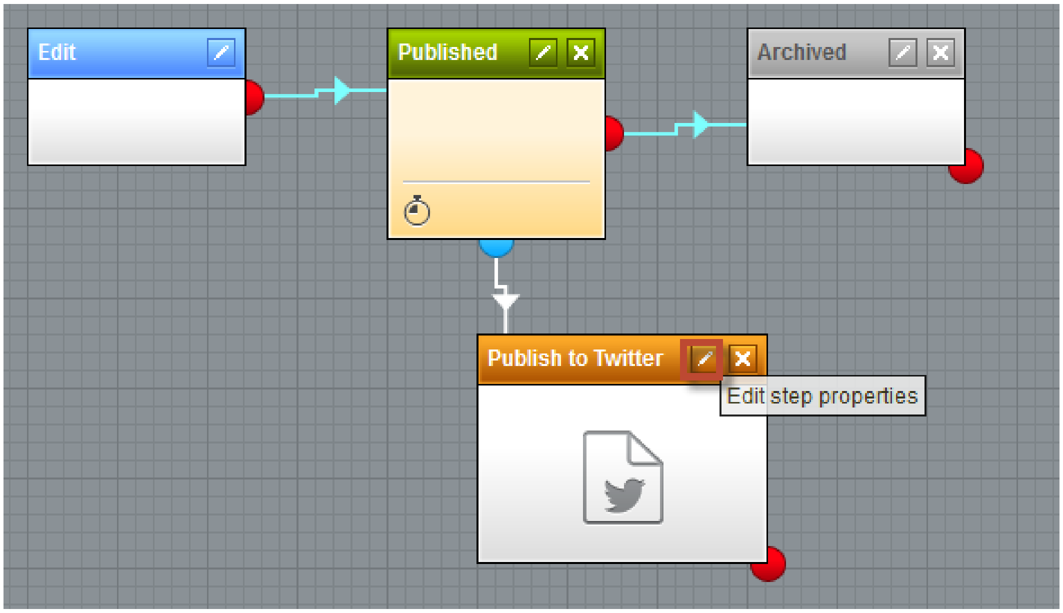
6. On the design surface for the **Published** step confirm that you see the timer icon and blue connector as shown in the following screenshot.



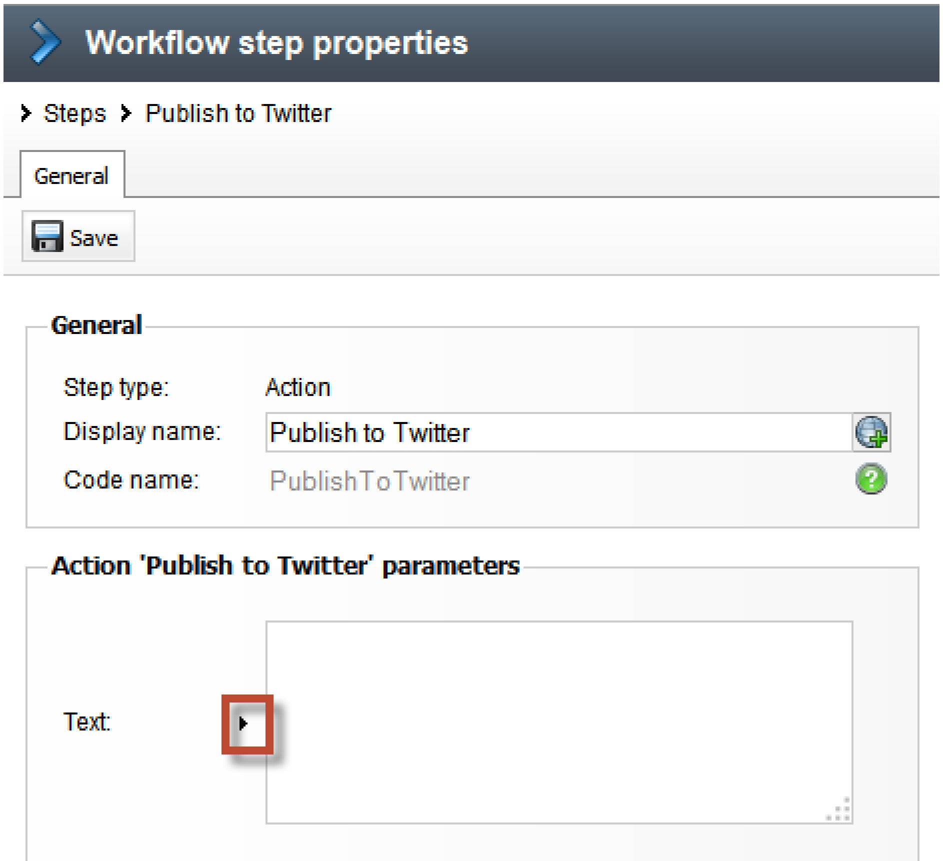
7. On the design surface for the **Published** step drag the blue connector to the **Publish to Twitter** step as shown in the following screenshot.



8. On the design surface for the **Publish to Twitter** step select the **Edit step properties (pencil)** icon as shown in the following screenshot.

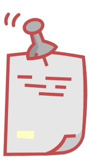


9. In the Workflow step properties in the Action 'Publish to Twitter' parameters next to Text select the triangle selector as shown in the following screenshot.



10. In the **Edit value** text field enter the following macro and then select **Save**.

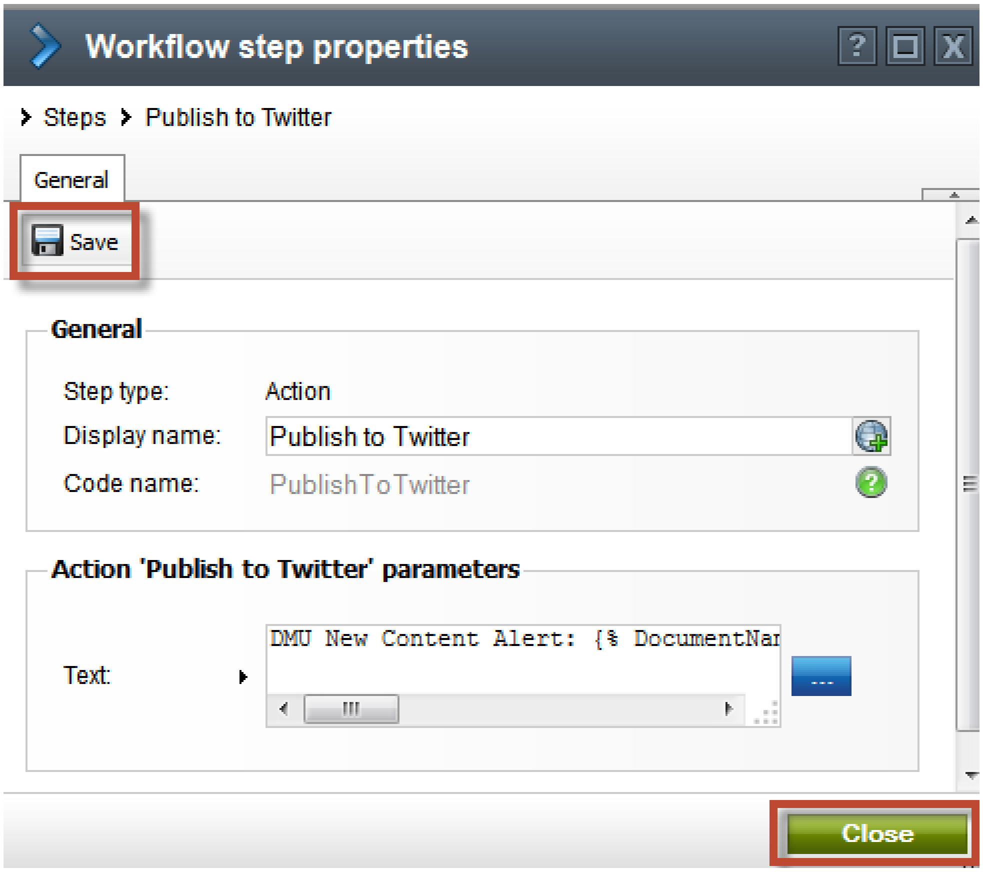
New Content Alert: {% DocumentName %} available at http://yourURL{% Document.NodeAliasPath #%}.aspx



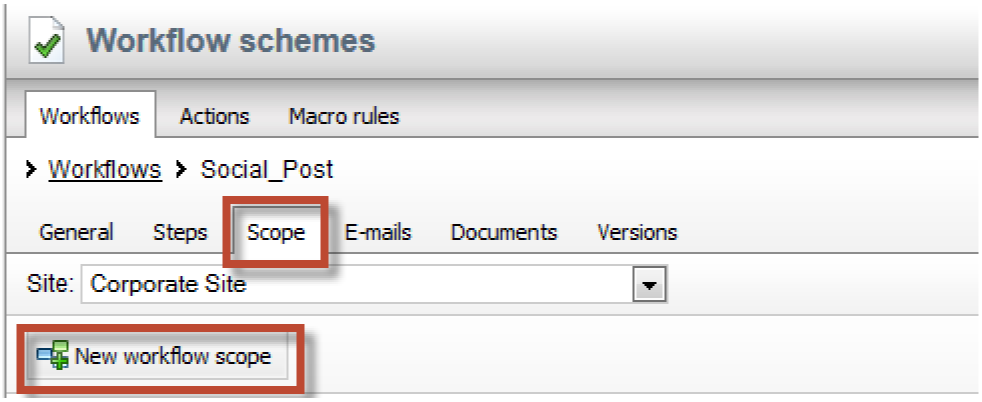
What am I looking at?

This macro is resolved when posted to Twitter and will include the document name and shortened URL.

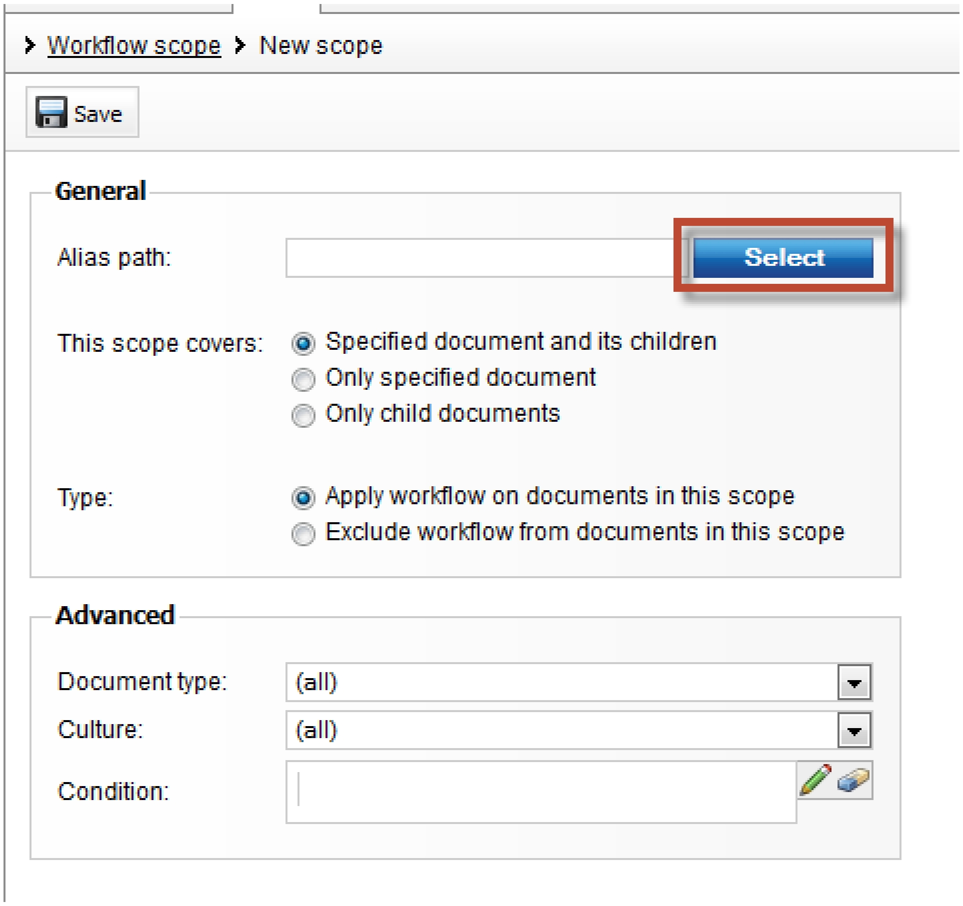
11. In the Workflow step properties screen select **Save** and then **Close** as shown in the following screenshot.



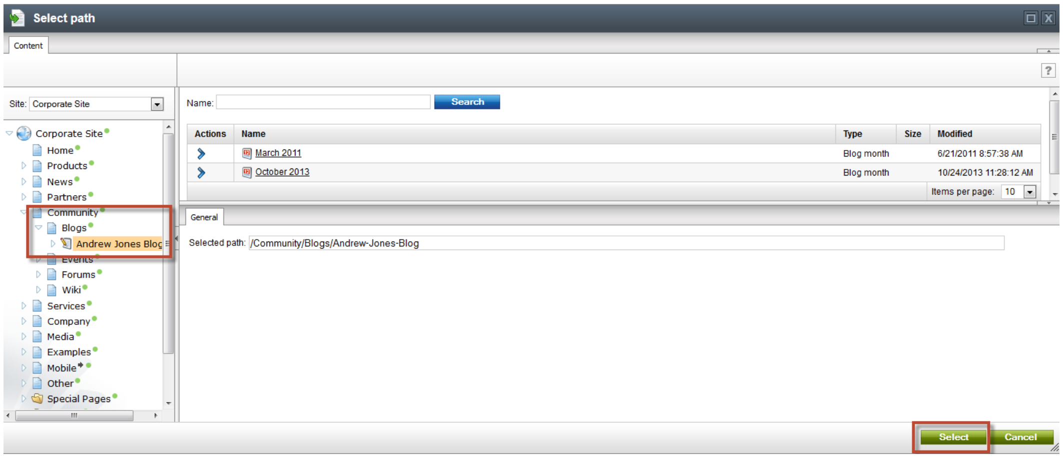
12. In the Workflows menu select the **Scope** tab and then click **New workflow scope** as shown in the following screenshot.



13. In the New scope screen in the **General** section in the **Alias pat**h click the **Select** button as shown in the following screenshot.

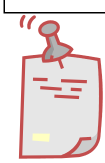


14. In the Select path screen expand the **Community** node, then expand **Blogs**, select **Andrew Jones Blog** and then click the **Select** button as shown in the following screenshot.



15. In the Scope ID:1 screen update the following fields and then select **Save**.

Section	Fields	Value
General	**This scope covers**	**Specified documents and its children**
General	**Type**	**Apply workflow on documents in this scope**
Advanced	**Document type**	**Blog Post (CMS.BlogPost)**

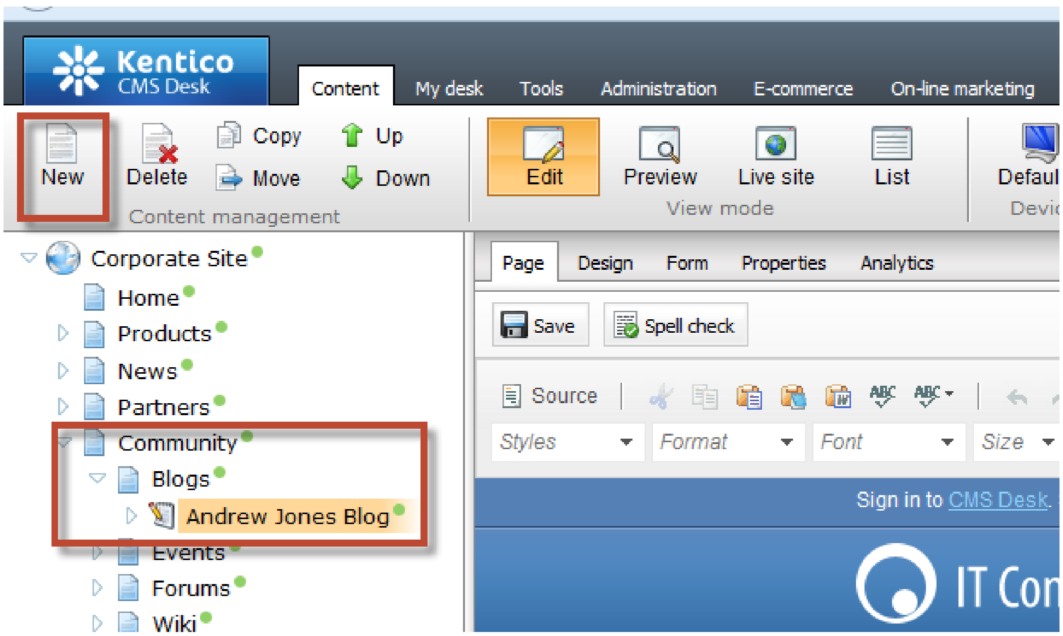


What am I looking at?

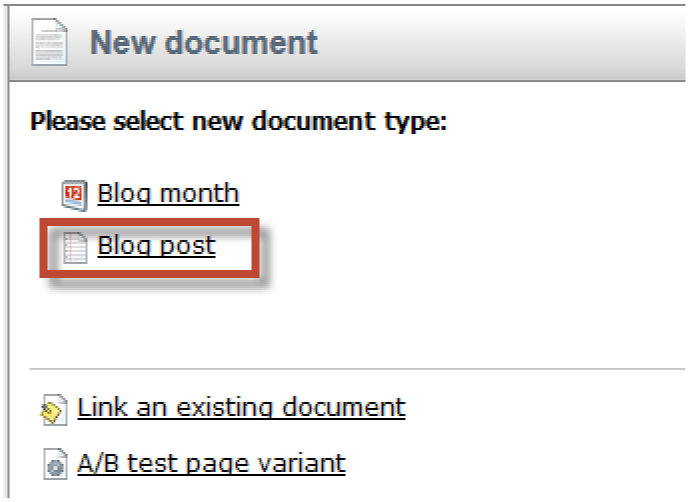
In this example we created a workflow for blog posts only. You can have multiple scopes that cover multiple different document types.

Lab 6-6: Executed the advanced workflow

1. Log into CMS Desk in the Content tree expand **Community**, then **Blogs**, select **Andrew Jones Blog** and then click **New** as shown in the following screenshot.



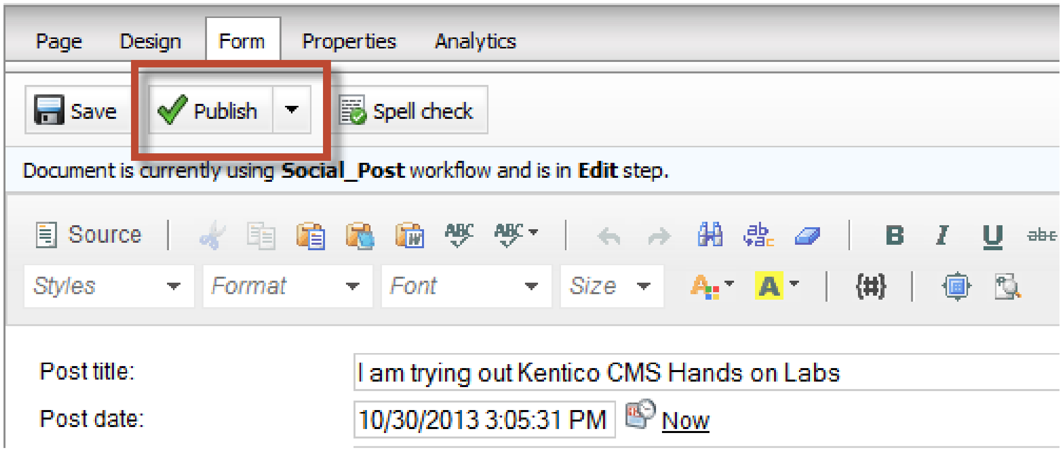
2. In the New document screen select **Blog post** as shown in the following screenshot.



3. In the New blog screen update the following fields and then select **Save**.

Field	Value
Post Title	**I am trying out Kentico CMS Hands on Labs**
Post date	**Select Now**
Post Summary	**I am doing a lab in the Kentico CMS Hands on Labs series**
Post Text	**I am almost done and this is a test of the social integration features.**

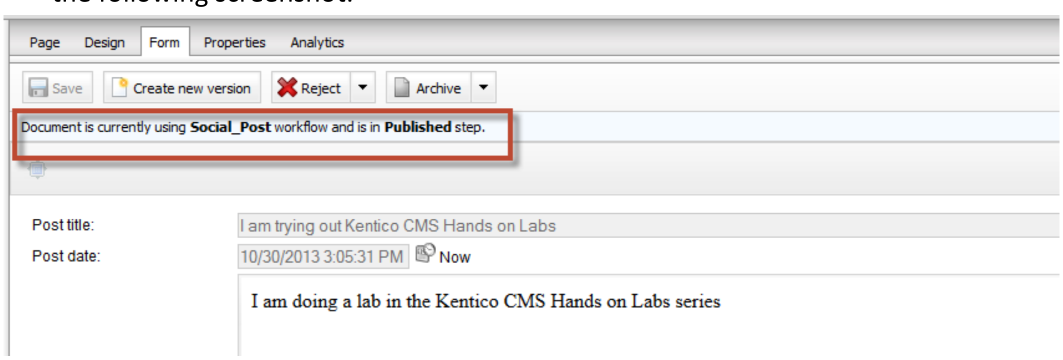
4. In the New blog post screen click **Publish** as shown in the following screenshot.



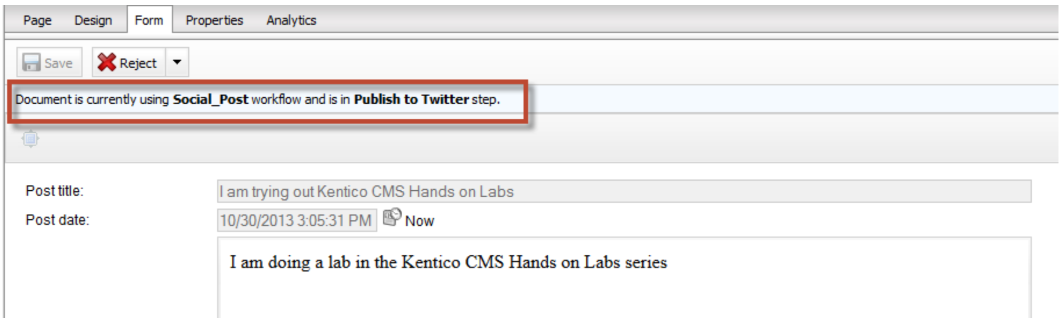
What am I looking at?

This blog post is under the Social Post workflow we created in the previous lab.

5. Confirm that you see the workflow has moved to the **Published** step as shown in the following screenshot.

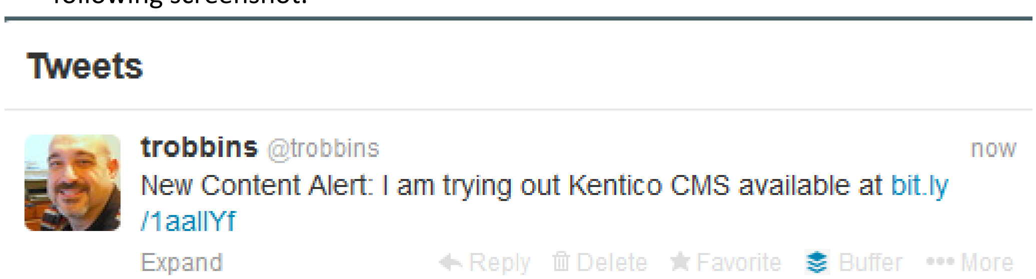


6. Wait one minute and then refresh the document to confirm that the document has been moved to the **Publish to Twitter Step** as shown in the following screenshot.



7. Select the **Live Site** to confirm that you see the document as shown in the following screenshot

8. Open your Twitter account and verify that you see the Tweet as shown in the following screenshot.



Summary

In this Hands on Lab we have looked at how to use Advanced workflow to automatically post to Twitter. Specifically we covered the following.

- What information is needed from Twitter to use social medial integration with Kentico CMS
- What information is needed to from bit.ly to use URL shortening with Kentico CMS
- How to create a new Advanced workflow
- How to create a scope that will select documents for an Advanced workflow

Key Resources:

- http://devnet.kentico.com/docs/devguide/index.html?workflow_designing_advanced.htm
- http://devnet.kentico.com/Videos/Feature-series/Kentico-Feature-Series-Advanced-workflow.aspx