

CO-OP WEB BUILDER



✓ FAST ✓ EASY ✓ SECURE

2023 User Manual & Quick Start Guide

If you ever have questions while working on your site, please reach out to the CWB team at coopwebbuilder@touchstone.nreca.coop. Additional resources are also available at <https://www.coopwebbuilder3.com>.

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1. Logging In

To begin using your Co-Op Administrator Permissions, you will first need to log in to your site. You will be able to log in using yourwebsitedomain/user/login. When on the correct page, you will see the screen below:

Username *

Enter your Touchstone Energy Cooperative, Inc username.

Password *

Enter the password that accompanies your username.

▼ CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Math question *

3 + 5 =

Solve this simple math problem and enter the result. E.g. for 1+3, enter 4.

Log in

Log-in using your username and password that were set up when creating your account.

!! Stuck?

If you are having trouble logging in, you can always reset your password. When clicking this option, instructions will be sent to your email address. If you are still having issues or did not receive an email, reach out to the CWB team and we can manually reset your password.

Log in

Reset your password

Username *

Enter your Touchstone Energy Cooperative, Inc username.

Password *

Enter the password that accompanies your username.

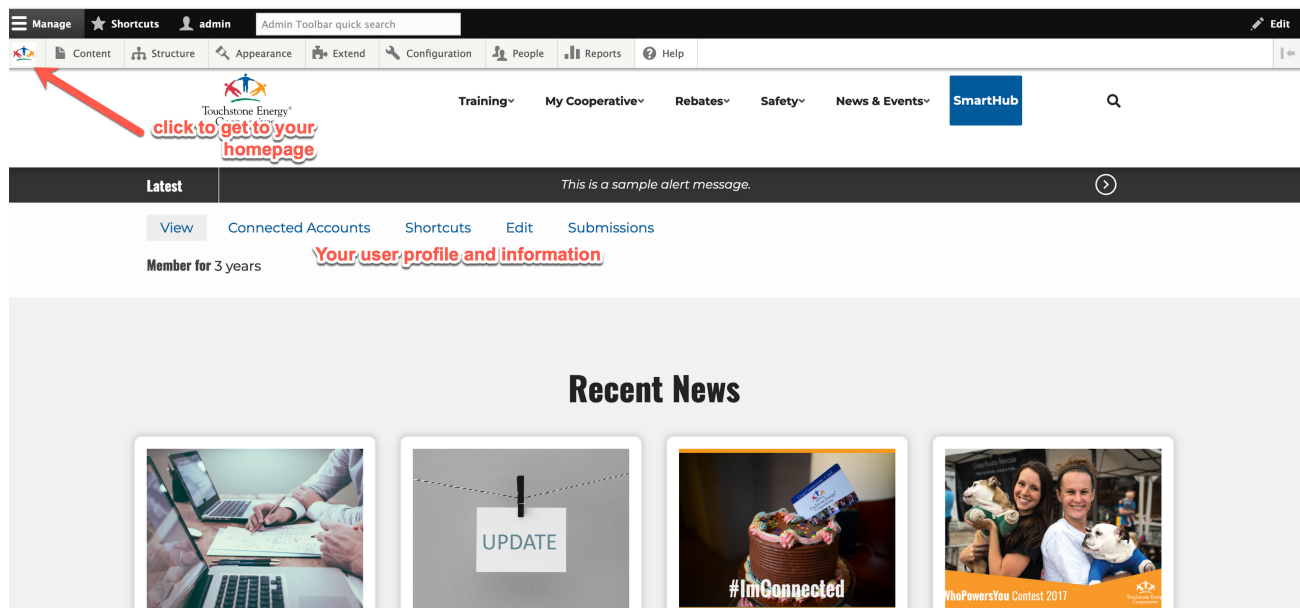
2. Your User Page

Once logged in to your site, the first page you land on will be you "User Page."

This will allow you to see:

- How long your account has been active
- Shortcuts you created
- Submissions you have made for webforms

In most cases, you will not be doing much on this actual page. You probably want to go to your homepage, which you can do by clicking your site's logo in the left corner of your admin toolbar.



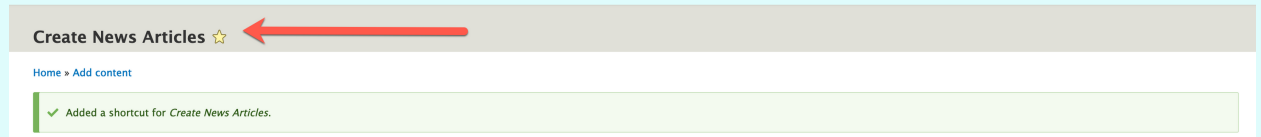
3. Drupal Admin Toolbar

Now that you went through the work of logging in, you can make the most of your "Co-Op Admin" privileges by using the admin toolbar. This will be your best friend when navigating your website. You can use the toolbar to make almost any change that is needed. There are three main sections to be familiar with: **Manage, Shortcuts, and Admin.**

A screenshot of the Drupal Admin Toolbar, showing the 'Manage', 'Shortcuts', and 'admin' tabs. The search bar is labeled 'Admin Toolbar quick search'. Below the toolbar, there are icons for Content, Structure, Appearance, Extend, Configuration, People, Reports, and Help. The 'Manage' section is highlighted in a light blue box.

Manage: This is the main section you will be using and loads on default. This is where you can create new content, access the structure of your homepage and individual pages, change appearance settings, such as your color scheme, and more.

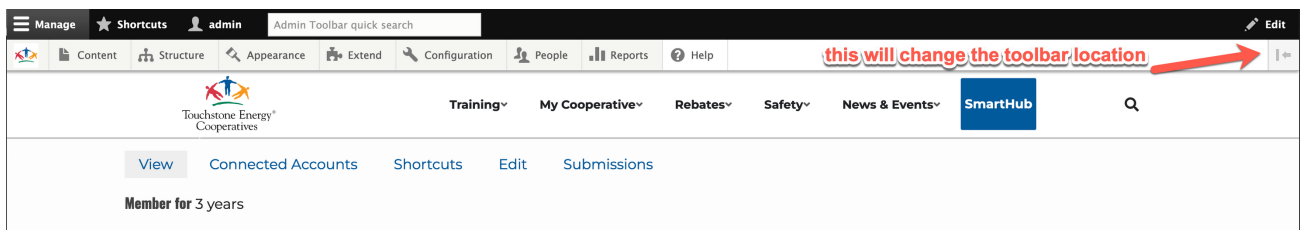
Shortcuts: One cool feature of our platform is the ability to add shortcuts to pages. Maybe you frequently edit your homepage slideshow and want quick access to the edit page. Add a shortcut and save yourself some time! Any editing page can be added to your Shortcuts by pressing the star icon, as seen below.



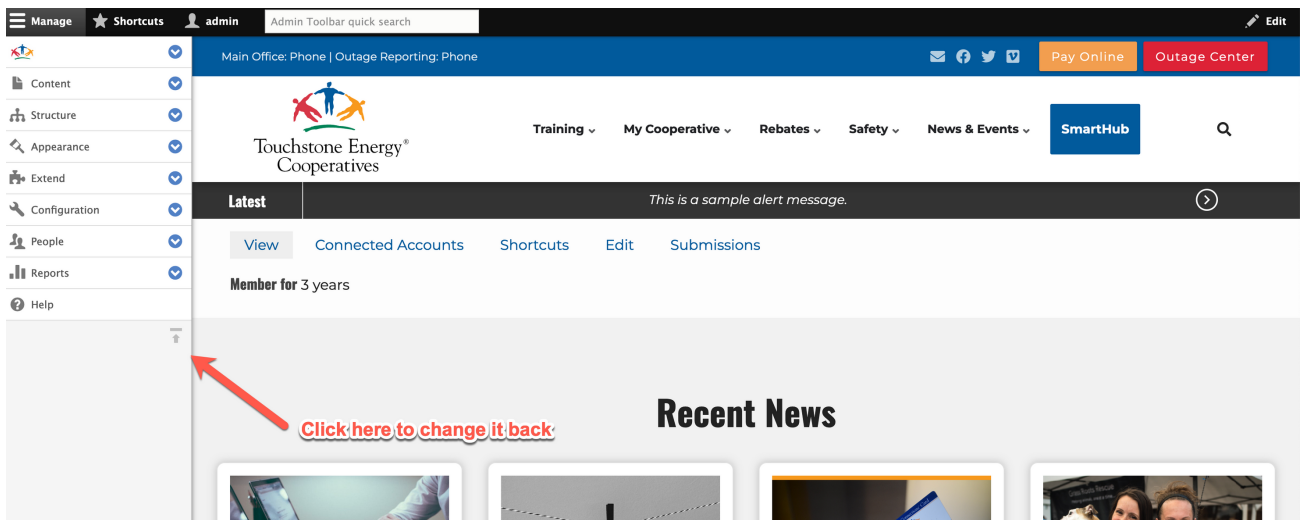
Admin: You can use the admin section to log out or view your profile.

👉 Pro Tip

Maybe you would prefer to have the toolbar to the side of your screen (like it is in WordPress) as opposed to across the top. Well good news-- you can change the location of your toolbar by clicking the button on the top right of your screen:



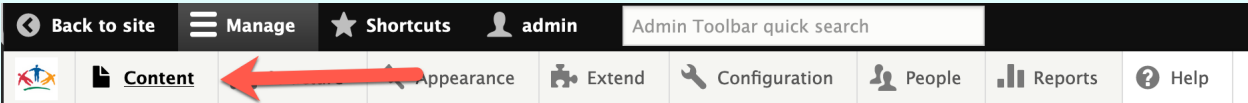
Now your admin toolbar looks like this!



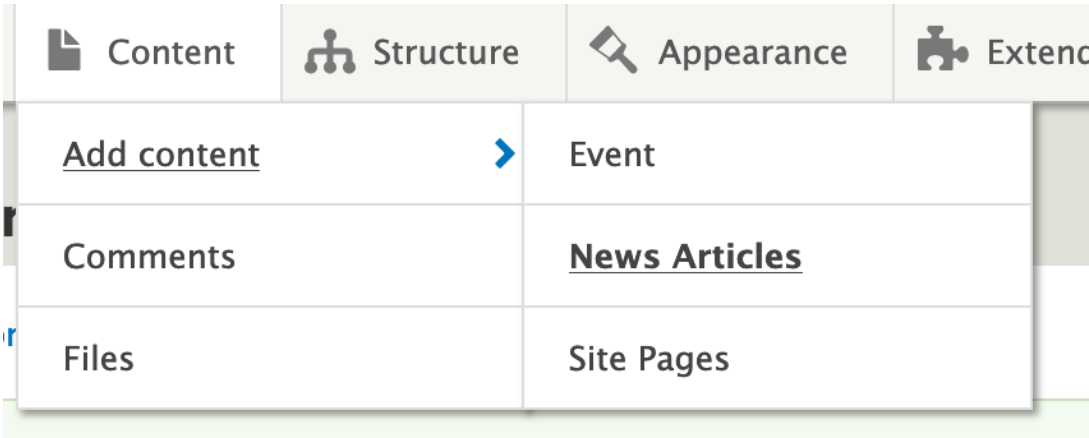


4. Content

Anytime you want to create a new page or post a news update or event, that would fall under the category of content. You can see the different content types your site offers under Manage → Content → Add Content in your admin toolbar. The Content menu also lets you view comments (if your site uses them) and your website's files.



Clicking on the content button will show you all of your posts, of all types.



It is good to be familiar with your different content types.

Site Pages: Any time you want to create a page with information that will stay on your website will be a site page. Every page you access via your site's main navigation is likely under the Site Pages category.

News Articles: When you post stories, blog posts, or timely updates, these would fall under the category of New Articles.

!! It is important that you keep your Site Pages and News Articles seperate. For example, if you want to create a feed of your news, we would filter it by content type. You would not want a news feed populating your Site Pages along with your news articles.

Event: Some cooperatives like to add events, which populate on an upcoming calendar. If this is something your cooperative uses, adding an event will display the correct information to the calendar.

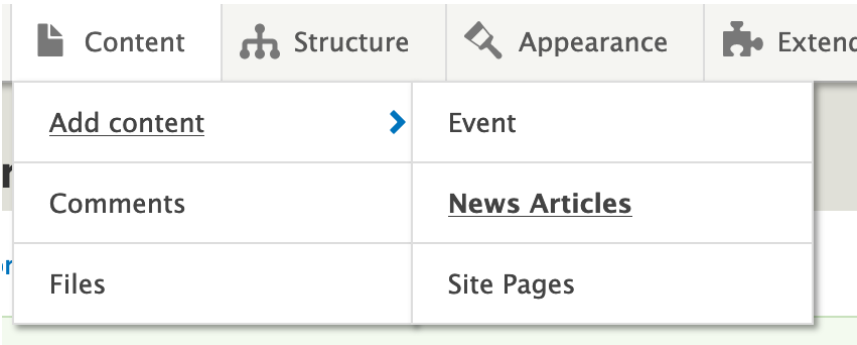
⌚ Depending when your site was created, your content types may be named differently.

If you see **Articles**: this is the older version of "Site Pages"

If you see **News**: this is the same as News Articles

5. Adding Content

Now that we're familiar with different content types, we can start posting!
Under content, go to add content, and select the type of post you want to make:



Clicking on the content type will take you to the editor for that specific content type.

For our example, let's look at the News Article editor. The Create page will tell you exactly what information is needed to make a post. Red asterisk indicate a required field. The body section is where you can add your main content, this will be text, images, or whatever else you may want to add. Later, we will go over an alternative workflow.

Create News Articles ☆

Home » Add content

Title *

DATE PUBLISHED *

02 / 14 / 2023 11 : 26 : 28 AM

Please enter the date that you would like this story to appear published on.

Card Image

Open File Browser

Browse... No file selected.

Last saved: Not saved yet

Author: admin

Revision log message

Briefly describe the changes you have made.

MENU SETTINGS

METATAGS

SIMPLE XML SITEMAP

URL ALIAS

AUTHORING INFORMATION

One file only.
100 MB limit.
Allowed types: png gif jpg jpeg.
Images larger than 2560x2560 pixels will be resized.

Published

Of course, when you are finished creating a post, you will need to save it. If you want to schedule it for a later date, you can always uncheck the "Published" box.

!! Menu Links: Want to add a page to your menu while you are creating it? You can do that by clicking the menu settings to the right side of the page.

▼ MENU SETTINGS

☒ Provide a menu link

Menu link title

name of the page as it will appear on the menu

Description

Shown when hovering over the menu link.

Parent item

<Main navigation>

section on menu it will go under

Weight

0

Menu links with lower weights are displayed before links with higher weights.

► METATAGS

► SIMPLE XML SITEMAP

► URL ALIAS

► AUTHORING INFORMATION

► PROMOTION OPTIONS

Once the post is published, the menu link will be added along with it.

6. Editing Content


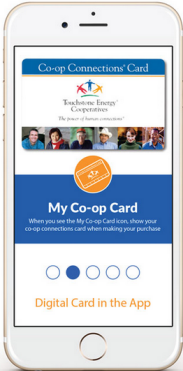
There are a couple of different ways to edit content. On older themes, there is usually a bit of navigation needed. However, with the newest **Gravity Theme**, you have access to quick editing tools. This is an incredible new feature and one of the big reasons switching to Gravity is a great idea.

Your first option for editing is to click the edit button on the page you would like to change. This will give you access to the body, where you can change the content. You can also change the menu link, title, etc.

[View](#)[Edit](#)[Delete](#)[Revisions](#)

Healthy Savings Discounts

Touchstone Energy® Cooperatives' Co-op Connections® Program helps you save more and live healthier every day! Our highly successful prescription discount offer is now joined by discounts on dental, vision, hearing, lab work & imaging and chiropractor visits. Best of all, you get all these great benefits for FREE!



Save on hundreds of local and national discounts - pharmacy savings, online offers, discounts on events, online cash back shopping and more. Members can get their co-op discounts by shopping online through connections.coop, the Co-op Connections mobile app, or by using the card. Get your card by requesting it from the Co-op.

HEALTHY SAVINGS
Pharmacy, dental, vision, diabetic, hearing aids, chiropractic, lab testing, and MRI & CT scans.

HOTEL SAVINGS
Save an average of 20% at over 400,000 locations worldwide.

CASH BACK SHOPPING
Earn up to 20% cash back when you shop at over 2,000 online



This edit button takes you back to the create screen where you can edit the body

With Gravity, you also have access to the quick edit tools by clicking the pencil icon to the right of the screen (seen below).

[View](#)[Edit](#)[Delete](#)[Revisions](#)

Healthy Savings Discounts

Touchstone Energy® Cooperatives' Co-op Connections® Program helps you save more and live healthier every day! Our highly successful prescription discount offer is now joined by discounts on dental, vision, hearing, lab work & imaging and chiropractor visits. Best of all, you get all these great benefits for FREE!



Save on hundreds of local and national discounts - pharmacy savings, online offers, discounts on events, online cash back shopping and more. Members can get their co-op discounts by

[Quick edit](#)[Edit](#)[Delete](#)

"Quick edit" will allow you make changes directly on the page. This is great if you are looking to make changes that you are able to see.

Body → Co-op Connections Sa... ✕

Healthy Savings Discounts

Touchstone Energy® Cooperatives' Co-op Connections® Program helps you save more and live healthier every day! Our highly successful prescription discount offer is now joined by discounts on dental, vision, hearing, lab work & imaging and chiropractor visits. Best of all, you get all these great benefits for FREE!

Perhaps you aren't looking to change the content of the page, but rather change the layout or add a special feature. In these cases, you would use the bar at the bottom of the screen.

REGION: HEADER

REGION: COLUMN1

REGION: COLUMN2

REGION: MIDDLE

BLOCK: BODY

✕^vMOVE⚙


Healthy Savings Discounts

Touchstone Energy® Cooperatives' Co-op Connections® Program helps you save more and live healthier every day! Our highly successful

Touchstone Energy's cooperative Co-op Connections Program helps you save more and live healthier every day. Our amazing seasonal prescription discount offer is now joined by discounts on dental, vision, hearing, lab work & imaging and chiropractor visits. Best of all, you get all these great benefits for FREE!

BLOCK: PARAGRAPH BLOCKS

X ^ v MOVE



Save on hundreds of local and national discounts - pharmacy savings, online offers, discounts on events, online cash back shopping and more. Members can get their co-op discounts by shopping online through connections.coop, the Co-op Connections mobile app, or by using the card. Get your card by requesting it from the Co-op.

HEALTHY SAVINGS
Pharmacy, dental, vision, diabetic, hearing aids, chiropractic, lab testing, and MRI & CT scans.

HOTEL SAVINGS
Save an average of 20% at over 400,000 locations worldwide.

Change Layout Manage Content Edit

Change Layout: change the look of your current page

Manage Content: add additional content to your page, such as media cards, accordions, etc.

Edit: Rearrange where each component will be displayed on your page.


In-Page Panel Design: There are a few different workflow options that may work best for you. You can edit directly in the body and paragraph content like up above, or choose to do In-Page Panel Design, like below. You can always do a combination of both.

The Panels design tools are located at the bottom middle of your screen, click Edit to unlock all the available blocks of content on your page.

Tip: Everything in the CMS is referred to as a block, which means a block of editable content. This can be a slideshow, social media icons, menus, or just a block of text.

BLOCK: OUTAGE RESOURCES

X ^ v MOVE



STORM CENTER

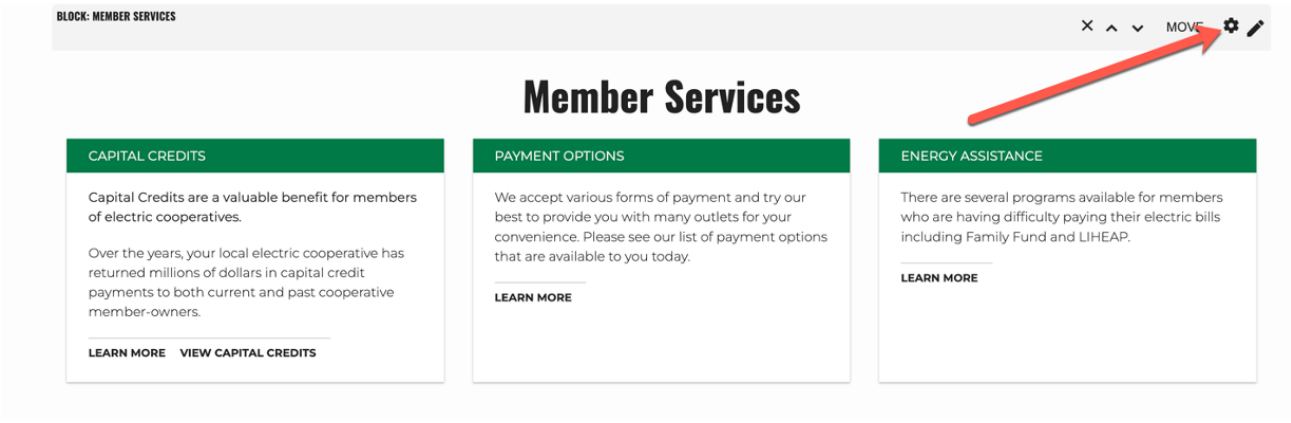
Visit our Storm Center page to report and check outages. If you are experiencing an outage please call 1-800-555-5555. Downed lines? Please call and let us know your situation.

Visit Storm Center

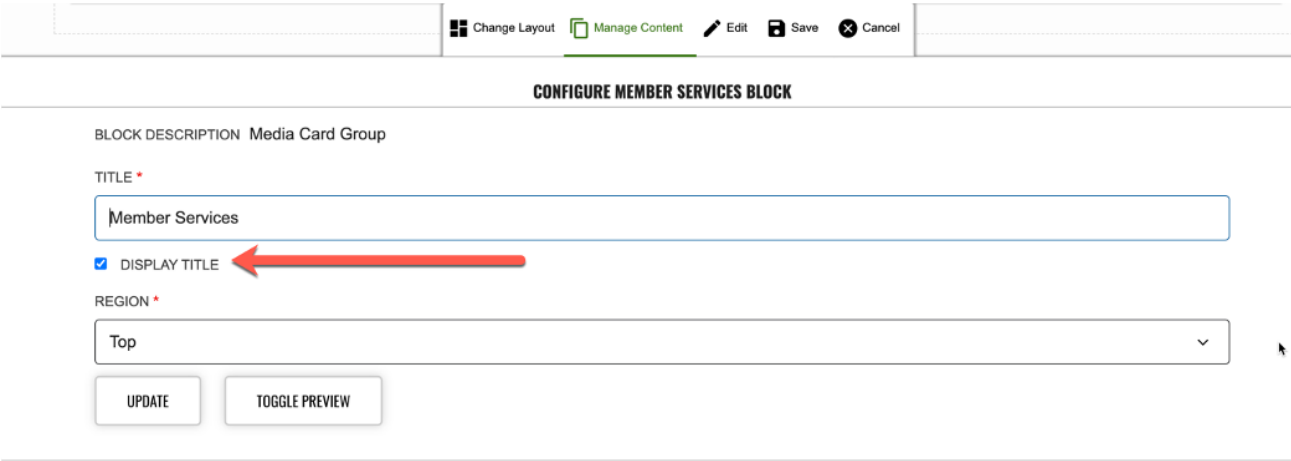
BLOCK: SOLAR POWER

Change Layout Manage Content Edit

Use the **Cogwheel** to modify the **Title** of a block, this can be shown on the page as in the example below. The **Title** can also be turned off if desired.

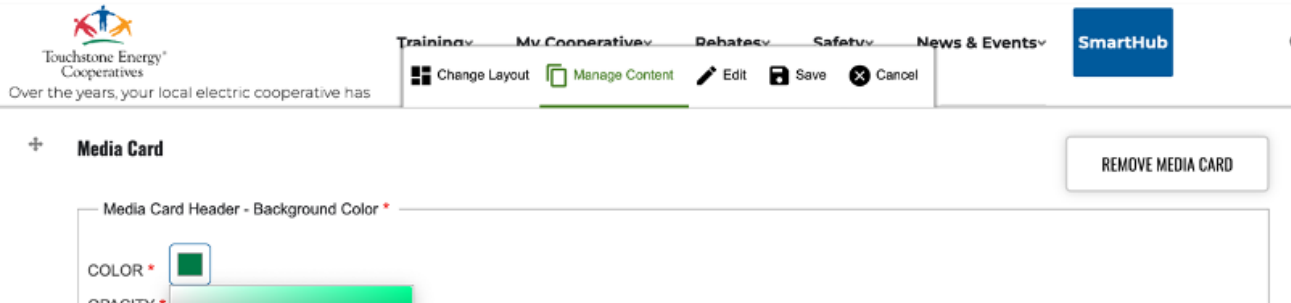


The user interface will slide-up and let you make changes while you are looking at your page. For the **Cogwheel** option, you can uncheck **Display Title** or change the **Title** here directly.



When clicking the pencil for any block, a drawer slides up with options available for this piece of content. Try editing some of your existing components now, to see how this functions on your site.

Tip: Each component has different options. The **Media Card** (gravity theme exclusive), has options for header background colors, opacity, and title/copy.



OPACITY 1

Responsible

Media Card

Change the color

Media Card

Capital Credits

Media Card Title

7. Custom Blocks

Your CWB site is built of **Blocks**, which are individual pieces of content that build your page. For example, you can see how the page below is divided into different sections, with each section holding its own piece of content.

Block #1

BLOCK: HOMEPAGE BUTTON COLLECTION

Your Account Service Options Outage Map Mobile App

Block #2

BLOCK: OUTAGE RESOURCES

STORM CENTER

Visit our Storm Center page to report and check outages. If you are experiencing an outage please call 1-800-555-5555. Downed lines? Please call and let us know your situation.

Visit Storm Center

Block #3

BLOCK: SOLAR POWER

SOLAR POWER FOR YOUR HOME

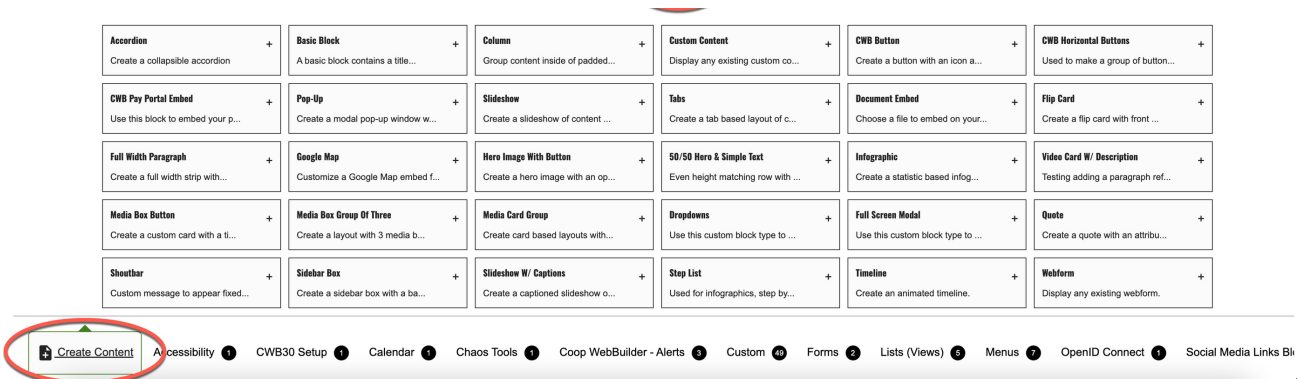
Your Source of Power. And Information. We can answer your questions.

Learn more

Change Layout Manage Content Edit

Block #1 is a group of buttons on this page, with Blocks #2 and #3 are hero images with additional information.

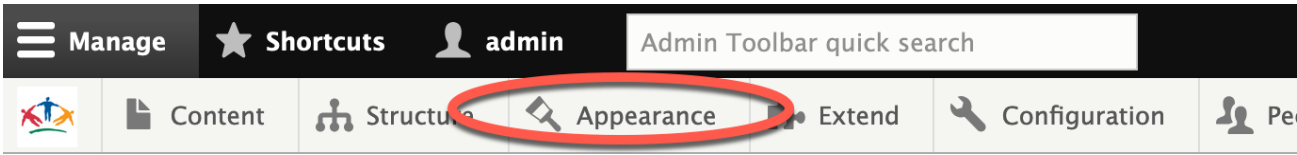
As a CWB admin, you have access to all sorts of Custom Blocks which you can see by going to **Manage Content → Create Content**.



By going to this view, you can see all of the block types at your disposal. Clicking on these will allow you to create a new element.

If you would like to see these in action before creating them, check out layout1.pod.coopwebbuilder3.com/custom-block-examples.

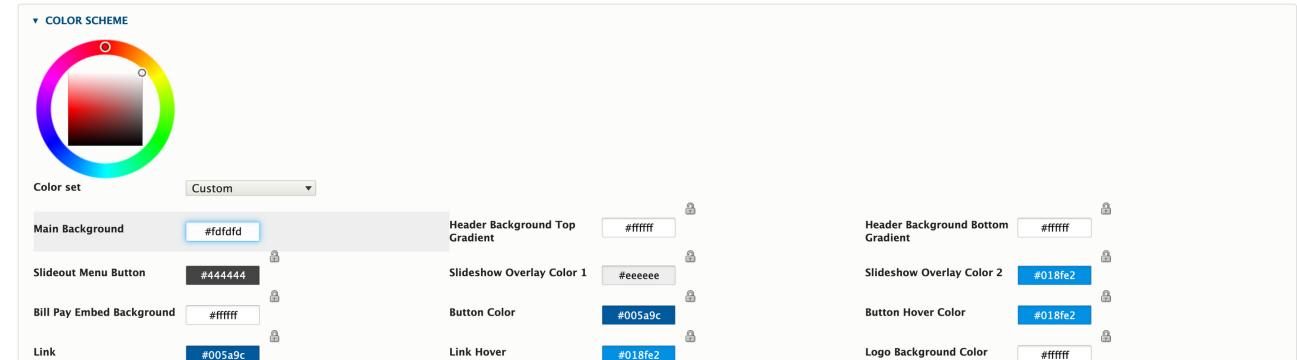
8. Your Site's Appearance



Clicking on the appearance tab of your admin toolbar allows you to customize how different elements are display **across your website**.

!! Individual Page Changes: If you want to change the color or appearance of an element on a single page instead of the whole website, we need to update your site's CSS code. In these situations, it is best to reach out to our team so we can make the change for you.

The below screen will give descriptions for each element you have control over. Click on an element you want to change and then use the color wheel to pick the new appearance. You can also type in a hexagon code using your co-op's current branding.



News Card Bottom Border	#018fe2	Media Card Top Border	#005a9c	Sidebar Background	#f6f6f2
Slideout Region	#ededed	Text Color	#222222	Title & Site Slogan	#111111
Back to Top Icon	#018fe2	Footer Bottom Background	#005a9c	Social Media Icons	#ffffff
Base Color	#005a9c	Dark Color	#01355b	Accent Color	#018fe2
Footer Main Background	#005a9c	Main Menu Hover Color	#018fe2	Paragraph Primary	#008851
Paragraph Secondary	#005432	Paragraph Success	#83d073	Paragraph Info	#005baa
Paragraph Warning	#e19920	Paragraph Danger	#ed1b24		

9. Updating Your Logo

Staying in the Theme Settings from above, if you scroll to the bottom of the page you will see the following section:

▼ LOGO IMAGE

☐ Use the logo supplied by the theme

Path to custom logo

Salem_Electric_Logo_Horizontal_Blue.jpeg

Examples: Salem_Electric_Logo_Horizontal_Blue.jpeg (for a file in the public filesystem), public: /

Upload logo image

Choose File

No file chosen

If you don't have direct file access to the server, use this field to upload your logo.

▼ FAVICON

Your shortcut icon, or favicon, is displayed in the address bar and bookmarks of most browsers.

☐ Use the favicon supplied by the theme

Path to custom icon

avatar.png

Examples: avatar.png (for a file in the public filesystem), public: //avatar.png, or sites/default/ fi

Upload favicon image

Choose File

No file chosen

If you don't have direct file access to the server, use this field to upload your shortcut icon.

From here, you can upload a new logo image and favicon (the image that appears as the icon in the actual browser tab). This is a great area to be aware of in case you have a newer logo to upload.

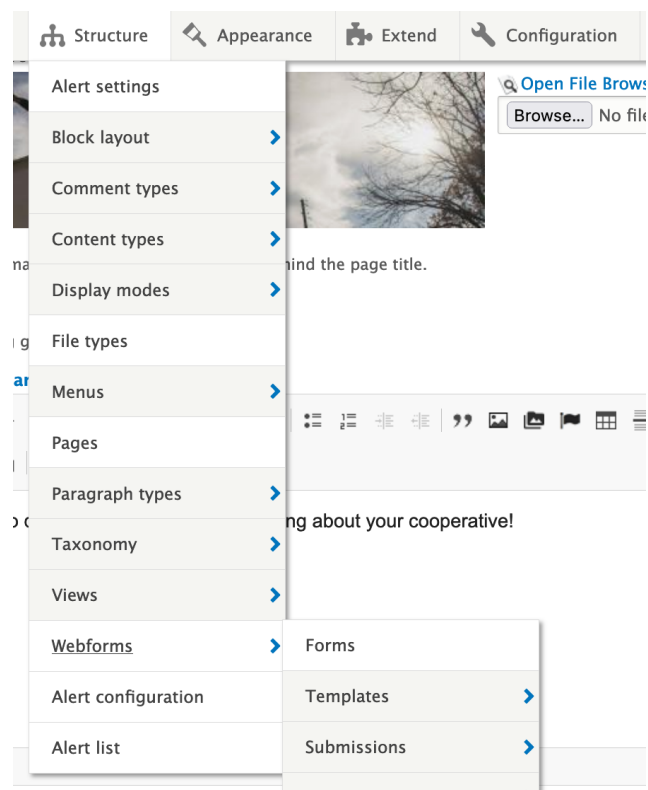
We recommend using a PNG image with a transparent background for the logo,

but JPEGs for all other images on the site.

10. Webforms

Webforms are a great function for your sites. They allow users to submit information to you securely. Webforms can be used for scholarship applications, general contact, employment, and more.

To see your site's webforms, go to Structure → Webforms → Forms in your admin toolbar.



To add sections to your webform, you will want to be in "build mode."

Contact Us

View

Test

Results

Build

Settings

Export

Elements

Source

Home » Administration » Structure » Webforms

The Elements page allows users to add, update, duplicate and delete elements and wizard pages. [Watch video](#)

+ Add element

+ Add page

+ Add layout

Show row weights

TITLE	KEY	TYPE	FLEX	REQUIRED	OPERATIONS
<div>+ Send Us A Message</div>	<div>+ Add element</div> send_us_a_message	Fieldset	1	<input type="checkbox"/>	<div>Edit</div>
<div>+ [flexbox]</div>	<div>+ Add element</div> flexbox	Flexbox layout	1		<div>Edit</div>
<div>+ Your Name</div>	name	Text field	1	<input checked="" type="checkbox"/>	<div>Edit</div>
<div>+ Your Email</div>	email	Email	1	<input checked="" type="checkbox"/>	<div>Edit</div>
<div>+ Your Phone Number</div>	your_phone_number	Telephone	1	<input type="checkbox"/>	<div>Edit</div>
<div>+ Subject</div>	subject	Text field	1	<input checked="" type="checkbox"/>	<div>Edit</div>
<div>+ Message</div>	message	Textarea	1	<input checked="" type="checkbox"/>	<div>Edit</div>
<div>+ [captcha]</div>	captcha	CAPTCHA	1		<div>Edit</div>
<div>+ Submit button(s)</div>	actions	Submit button(s)	1		<div>Edit</div>

STYLE SETTINGS

Save elements

Reset

Elements are our way of describing a part of the webform. There are a lot of options to choose from and it is good to test different ones out to see what works for you.

Commonly used elements are:

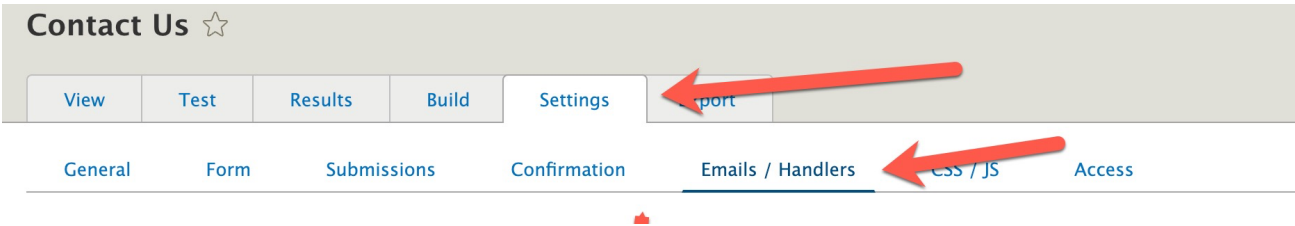
- Text Fields: this is a single input line for users to submit their name, etc.
- Address: automatically fills all properties of an address (street, state, etc)
- Text Area: text area is similar to a text field, but gives users more space
- Fieldset: a fieldset is the label that groups everything together

See It In Action: [Check out our video guide to webforms.](#)

11. Sending Webform Results via Email

Once you have created a webform, you may want to set up some email handlers so that the results are sent to you, or other colleagues.

To do this, you will first need to go to the **Settings** section of your webform.

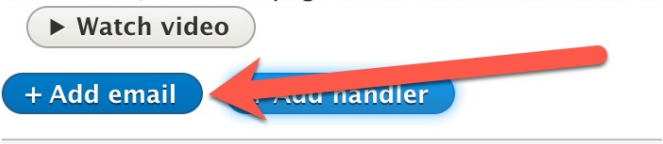


Emails/Handlers allow you to set up a lot of features. Here you can have results sent to you, and you can also set-up email confirmations for the user who completes the form.

When setting this up for the first time, you will need to click the **Add Email** button.

[Home](#) » [Administration](#) » [Structure](#) » [Webforms](#)

The **Emails/Handlers** page allows additional actions ar



Note: A Handler would only be needed for advanced functionality using separate applications. You should only need to use “Add Email” – if you ever

have a question about a possibility with webform functionality, please reach out to our team.

When clicking the **Add Email** button, some settings will populate on your screen. First is the title, which is just for your use, so name it whatever you would like.

GENERAL SETTINGS

Title *

Email

Machine name: email [\[Edit\]](#)

Administrative notes ?

Next, are the **Send To** settings. As the name suggests, this controls where an email notification is sent. If you need this sent to a specific email address at your co-op, you will want to select the Custom Email address setting and then type in the email address. You can also control if anyone needs to be CCed or BCCed on the email.

SEND TO ?

To email *

Custom To email address...

Enter To email address...

Multiple email addresses may be separated by commas.

CC email

- None -

BCC email

- None -

[Browse available tokens.](#) ?

Please note: You can select which **user roles** are available to receive webform emails by going to the Webform module's [admin settings](#) form.



The next section is the **Send From** section, which controls who the recipient sees as the email sender.

SEND FROM (WEBSITE/DOMAIN) ?

From email *

[site:mail] ▼

From name

Your Name (name) ▼

[Browse available tokens.](#) ?

For best practice, use the site:mail default. This has emails sent from the email associated with your website. This is a Touchstone Energy email address, which we have configured to work with most firewall settings.

The **From Name** shows the contact name associated with the email. You can change this to be any field from the form, or leave it as the website’s name.

The last section controls the **Message**. If you just want results sent internally, leave this on the default. This may look intimidating, but the code is just telling the system to send all submitted results within the email. You will almost always want to use the default here.

MESSAGE

Subject

Webform submission from: [webform_submission:source-title] ▼

Body *

Default ▼

1

<p>Submitted on [webform_submission:created]</p>

2

<p>Submitted by: [webform_submission:user]</p>

3

<p>Submitted values are:</p>

4

[webform_submission:values]

5

[Browse available tokens.](#) ?

This default message is telling the email system to send all values that are selected below:

INCLUDED EMAIL VALUES/MARKUP ?

Show all columns


<input checked="" type="checkbox"/>	TITLE	KEY	TYPE	PRIVATE	ACCESS
<input checked="" type="checkbox"/>	Your Name	name	textfield	No	All roles
<input checked="" type="checkbox"/>	Your Email	email	email	No	All roles
<input checked="" type="checkbox"/>	Your Phone Number	your_phone_number	tel	No	All roles
<input checked="" type="checkbox"/>	Subject	subject	textfield	No	All roles
<input checked="" type="checkbox"/>	Message	message	textarea	No	All roles
<input checked="" type="checkbox"/>	captcha	captcha	captcha	No	All roles

If you uncheck any of these boxes, that value will not be submitted to email. This is a good habit to practice, in case you are sending sensitive information like credit card info or social security numbers. In those cases, we strongly suggest unchecking that information and only viewing it while logged into the site.

If users are submitting attachments for their submission, like a scholarship essay, etc., you may want to consider sending those documents as an attachment in the email.

To do this, select the button allowing attachments to be sent with the emails to your staff.

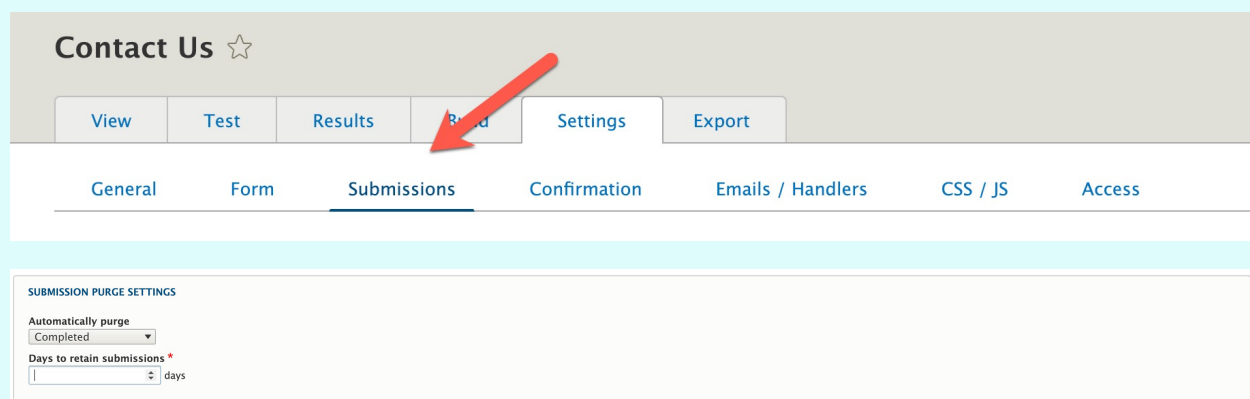
ATTACHMENTS

☐ Include files as attachments 

Save

[Delete](#)

Security Tip: You can set up your webforms to **Purge** their results. Meaning, after a certain amount of time, the webform results will be deleted from the site. This is a great practice to have so your site is not storing sensitive information for a long period of time. To view this, go to **Settings → Submissions**.



The screenshot shows the 'Contact Us' webform settings. The 'Submissions' tab is selected, indicated by a red arrow. Below the tabs, the 'SUBMISSION PURGE SETTINGS' section is visible, showing options for 'Automatically purge' (set to 'Completed') and 'Days to retain submissions' (set to 14 days).

From here, you can select how long you would like our system to retain submissions. If you set this to **14 days**, for example, the submissions will automatically delete after two weeks from submission.

Let's say you are setting up an email confirmation for the user, then you would want to make a custom message, like the below example.

MESSAGE

Subject

Webform submission from: [webform_submission:source-title] ▼

Body *

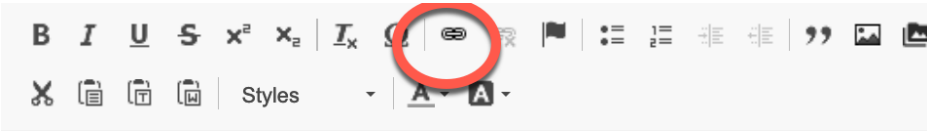
Custom body... ▼

Format ▼ | **B** *I* \times_2 \times^2 |   |    

 Source 

You will run into our text editor throughout the site. In addition to allowing you to add content to your page, our text editor has a lot of other features as well to be aware of:

Creating Links: If you need to add a link to a page or block, you can do so by clicking the link icon.



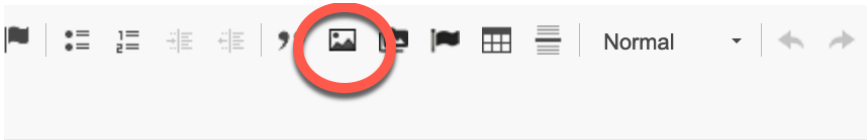
Use this page to describe everything and anything about your cooperative!

Highlight the text you want to turn into a link, click the button and enter your desired link into the following box:

A screenshot of a modal dialog box titled "Add Link" with a close button (X) in the top right corner. The dialog has a "URL" section with a magnifying glass icon and a text input field containing "Open File Browser". Below the input field is a placeholder text "Start typing to find content." The "Title" section has a text input field and a description: "Populates the title attribute of the link, usually shown as a small tooltip on hover." There is an "ADVANCED" section with a right-pointing arrow. At the bottom is a "Save" button.

Notice that you can type in a URL or also select a file from your file browser to use.

Images: You can upload images directly to the content you are working on using the tool below:



thing about your cooperative!

Once clicking on the tool, you can upload an image in the below screen. When adding alternative text, you want to describe what is happening in the image. This is what gets for users on a screen reader, so it is important to be descriptive for accessibility.

Insert Image

Image *

Browse...

No file selected.

Alternative text *

Short description of the image used by screen readers and displayed when the image is not loaded. This is important for accessibility.

Align

☒ None

☐ Left

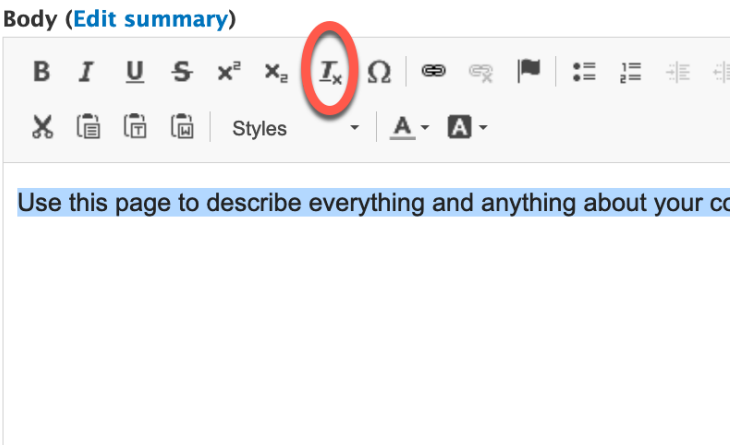
☐ Center

☐ Right

☐ Caption

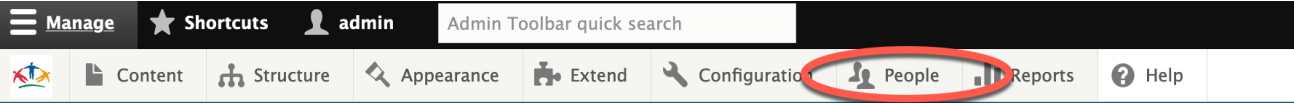
Save

Remove Formatting: It is common practice to write your content in Microsoft Word or Google Docs prior to posting on your website. However, sometimes this gives text formatting that we don't want to keep, impacting the look of the text. In our Text Editor, you can remove previous formatting by using the tool below:



!! Be Careful With Your Files: Your website has two different file directories, Public and Private. If a Public File is linked on your site, any users will be able to see it. If a Private File is linked, only logged-in users will be able to see it. If you are designing a webpage that is intended for the public, it is important that you only link to Public Files. Otherwise, that particular link will not work for a public user.

13. People



The people tab of your admin toolbar is where you can create new users for your site. As the Co-Op Admin, you have the power to add new users.

The Role of a user is what determines their site privileges. If you want a role created that limits site access, please let the CWB team know.

Add user ☆

Home » Administration » People

This web page allows administrators to register new users. Users' email addresses and usernames must be unique.

Roles

☒ Authenticated user

☐ Administrator

☐ CO-OP Admin

Email address

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Username *

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the @ sign.

Password *

Confirm password *

Passwords match:

Provide a password for the new account in both fields.

Status

☐ Blocked

☒ Active

☐ Notify user of new account

POLICY

STATUS

CWB Password Policy

Fail - Password length must be at least 15 characters.

CWB Password Policy

Fail - New role was added or existing password policy changed. Please update your password.

CWB Password Policy

Fail - Password must contain at least 3 types of characters from the following character types: lowercase letters, uppercase letters, digits, special characters.

CWB Password Policy

Fail - New role was added or existing password policy changed. Please update your password.

CWB Password Policy

Fail - New role was added or existing password policy changed. Please update your password.

Site language

English ▾

This account's preferred language for emails. This is also assumed to be the primary language of this account's profile information.

☐ Password Expiration

Control whether the user must reset their password. If the password has expired, this field is automatically checked after the execution of Cron.

LAST PASSWORD RESET

02 / 14 / 2023

01 : 32 : 44 PM

URL alias

Specify an alternative path by which this data can be accessed. For example, type "/about" when writing an about page.

Create new account

Determine the role the new user has

Email of new user

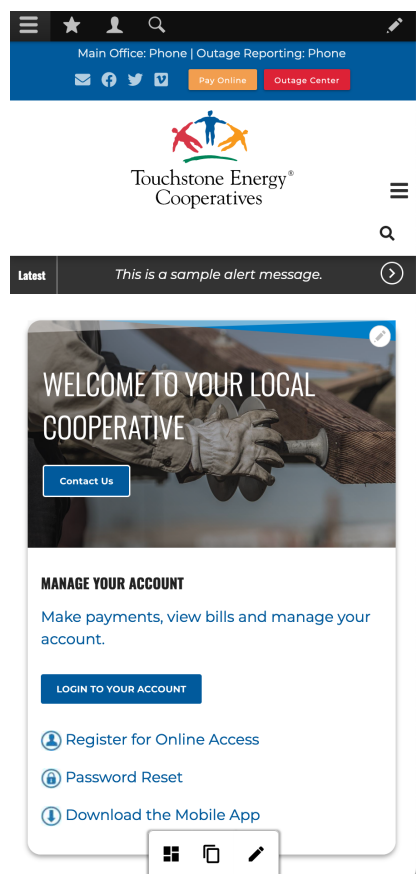
Username is what will be used for log in

You will check this box to send an email to the new user

Administrator vs. Co-Op Admin: Please never assign the "Administrator" role to someone within your co-op. This role is used for the CWB team ONLY. If someone in your organization is given this role, they will not be able to access your site. If you want to give someone full permissions to edit the site, they would be a "CO-OP Admin."

14. Mobile

Since many users will be visiting your website from their mobile devices, it is important to be aware of your mobile site's appearance. While on a desktop, you can resize your browser window and zoom to 125% to get a good view. By resizing the window into the below shape, this is the view you get:



Our website themes are designed to be mobile friendly, so if something is working on desktop, it should be working on mobile as well. If you notice anything is not functioning correctly, please reach out to the CWB team.

If you prefer to work on mobile, you can also access your admin toolbar on a tablet

or mobile device and make edits that way.

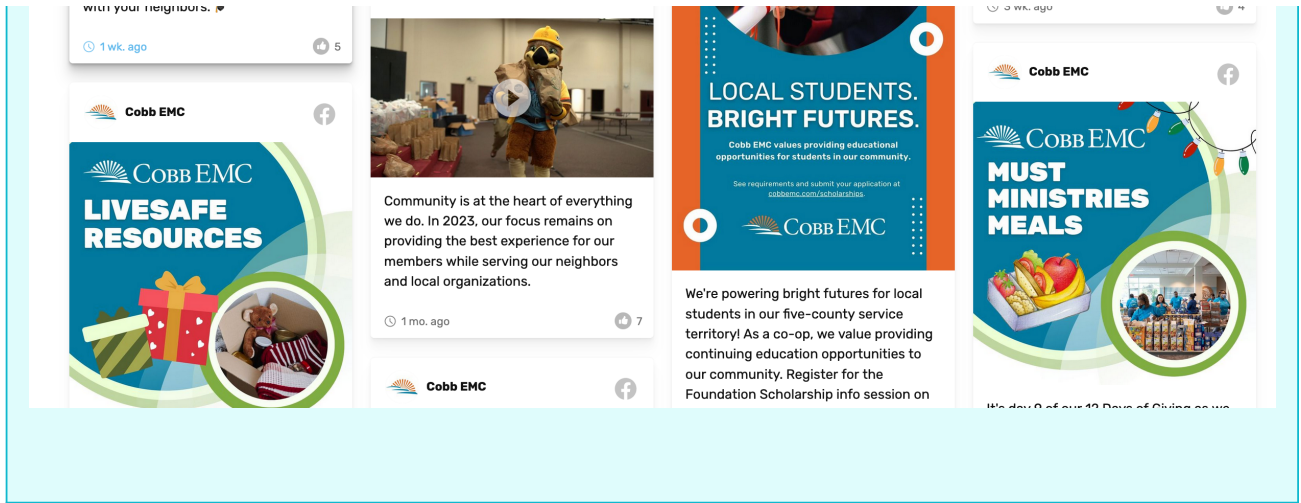
15. Social Media Feeds

Connecting your social media content to your website is a great way to ensure your site has content being posted regularly. We suggest two platforms that can make this easy:

POWR: "In just a few clicks you can get started for free and have access to a whole library of plugins that will work on any website-building platform and on any device. Feel like a professional web designer, with zero code, zero hassle, all while getting the best for your business."

Follow Us On Facebook!

Elf Sight: "Elfsight widgets help 1,000,000+ website owners to increase sales, engage visitors, collect leads and more. Save your time and money with ready-to-use solutions and grow your business faster!"



16. Metatags

Metatags control the way your content displays when shared to a social media site. You can access the Metatags section on the right hand side of any page you are editing. Look through the Basic Tags and make sure that everything is set up the way you would like. The Advanced Settings are available to you as well. Each section also describes the functionality, so be sure to read through these if trying to make a fix. Please reach out to the CWB team at coopwebbuilder@nreca.coop if you have any questions while setting up Metatags. We are happy to get this set up for you.

▼ METATAGS

Configure the meta tags below.

Use tokens to avoid redundant meta data and search engine penalization. For example, a 'keyword' value of "example" will be shown on all content using this configuration, whereas using the [node:field_keywords] automatically inserts the "keywords" values from the current entity (node, term, etc).

Browse available tokens.

▼ BASIC TAGS

Simple meta tags.

Page title

[node:title] | [site:name]

The text to display in the title bar of a visitor's web browser when they view this page. This meta tag may also be used as the title of the page when a visitor bookmarks or favorites this page, or as the page title in a search engine result. It is common to append '[site:name]' to the end of this, so the site's name is automatically added. It is recommended that the title is no greater than 55 – 65 characters long, including spaces.

Description

Start typing your own custom thing.

A brief and concise summary of the page's content that is a maximum of 160 characters in length. The description meta tag may be used by search engines to display a snippet about the page in search results.

Abstract

Touchstone Energy® Cooperative Inc. is a national network of electric cooperatives that provides resources and leverages partnerships to help member cooperatives and their employees better engage and serve their members. By working together, Touchstone Energy cooperatives stand as a source of power and information to their 30 million member-owners every day.

A brief and concise summary of the page's content, preferably 150 characters or less. Where as the description meta tag may be used by search engines to display a snippet about the page in search results, the abstract tag may be used to archive a summary about the page. This meta tag is *no longer* supported by major search engines.

Keywords

A comma-separated list of keywords about the page. This meta tag is *no longer* supported by most search engines.

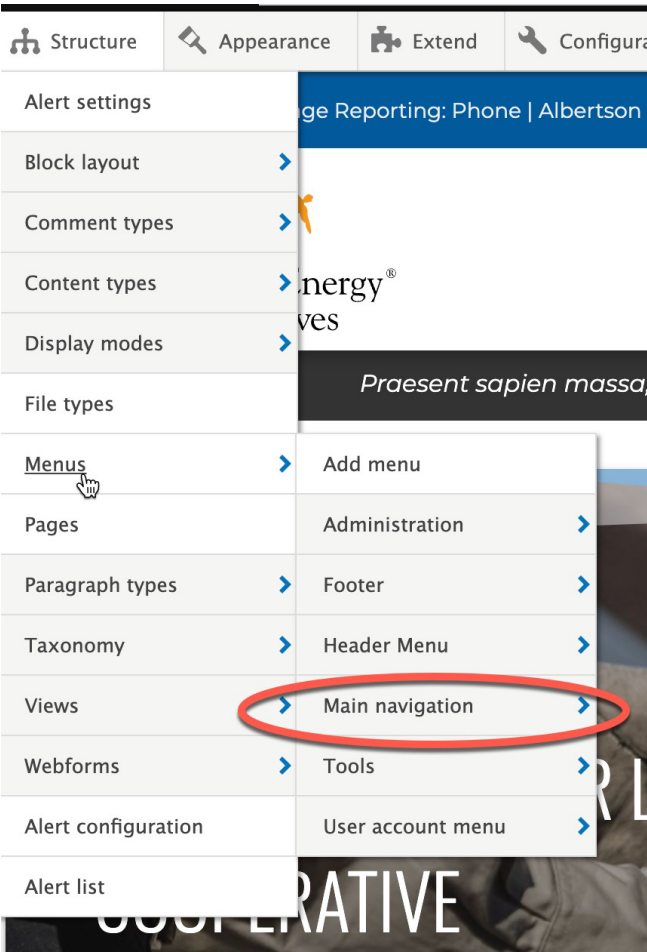
!! Great Resources: There are a lot of free websites that allow you to post a

link and preview how it looks on different social platforms. This is a key tool in ensuring everything is set up the way you would like.

We recommend: <https://www.opengraph.xyz/> and <https://socialsharepreview.com/>

17. Menus

Your menus control a big part of a user’s experience on your website. For this reason, it is important you know where to organize your menus. You can see all of your menus by going to **Structure → Menus → Main Navigation**. In most cases, you will be working with you **Main navigation**, which is the menu across the top of your website.



From here, you will see a list of all of your links. You can add new menu links by pressing the **Add Link** button.

Home » Administration » Structure » Menus

[+ Add link](#)

Title *

Main navigation Machine name: main

Administrative summary

Site section links

Menu language

English

MENU LINK	ENABLED	OPERATIONS
⊞ Home (disabled)	<input type="checkbox"/>	Edit ▾
⊞ Training	<input checked="" type="checkbox"/>	Edit ▾
⊞ Custom Block Examples	<input checked="" type="checkbox"/>	Edit ▾
⊞ My Cooperative	<input checked="" type="checkbox"/>	Edit ▾
⊞ Styles Guide	<input checked="" type="checkbox"/>	Edit ▾
⊞ Touchstone Energy Cooperatives	<input checked="" type="checkbox"/>	Edit ▾
⊞ About Us	<input checked="" type="checkbox"/>	Edit ▾
⊞ Contact Us	<input checked="" type="checkbox"/>	Edit ▾
⊞ Cooperative Principles	<input checked="" type="checkbox"/>	Edit ▾
⊞ Board of Directors	<input checked="" type="checkbox"/>	Edit ▾
⊞ Rebates	<input checked="" type="checkbox"/>	Edit ▾
⊞ Co-op Connections Savings	<input checked="" type="checkbox"/>	Edit ▾

You can see that branching links are indented in the menu. Our system allows you to simply drag and drop menu items to rearrange them. Clicking on a menu link will take you to the page, whereas clicking **Edit** will allow you to change the settings.


In the settings, you would set the title, which is how it will be named on the menu. You also decide what it links to. You can type a URL directly here or search for the piece of content by its name.

Menu link title *

Styles Guide

The text to be used for this link in the menu.

Link *

Styles Guide (17) 

- The location this menu link points to.
- Start typing the title of a piece of content to select it. You can also enter an internal path such as /about-us

☒ **Enabled**

A flag for whether the link should appear in the main menu or hidden.

Description

Shown when hovering over the menu item.

☐ **Show as expanded**

If selected and this menu link has children, the menu will always appear expanded. This option may not be available for all menu links.

Parent link

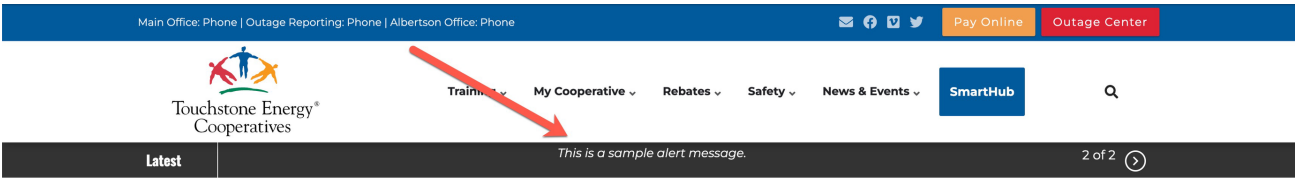
-- My Cooperative ▾

The maximum depth for a link and all its children is fixed. Some menu links may not be available as parents.

type URL or select content by title

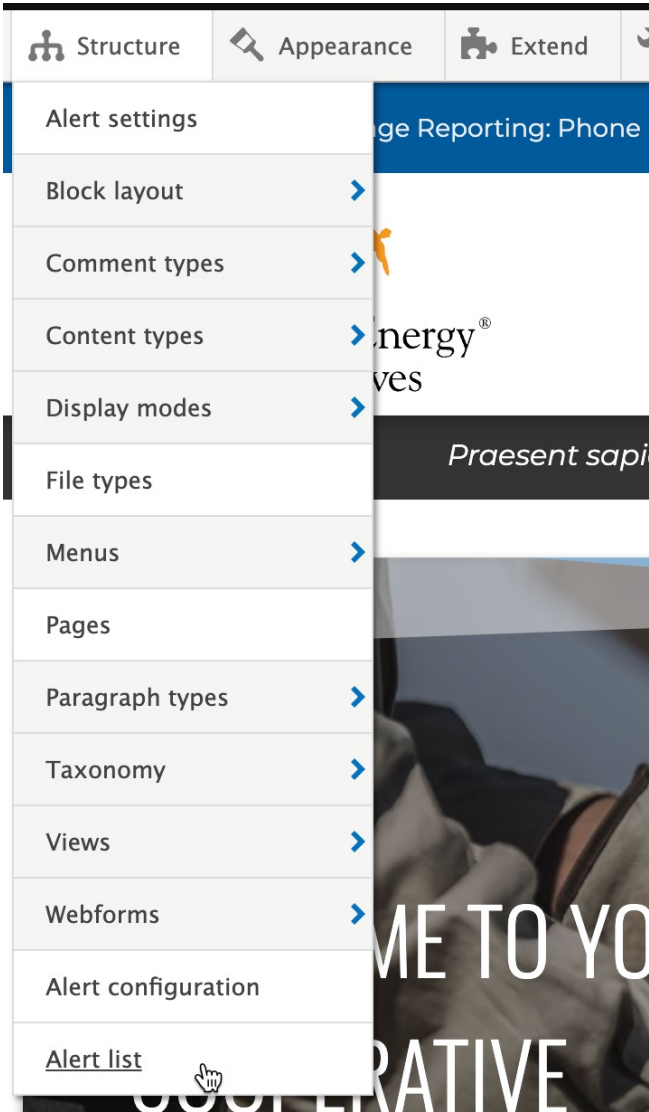
18. Alerts

Another great feature of the CWB platform is the ability to set up alerts in case there is a timely or urgent message you need to get out to member owners.



Theme Differences: The alert design might be different depending on your site’s theme, so if these instructions do not apply to your site, please reach out to us directly so someone can assist you.

To create alerts, this can be done from the **Alert List**, under structure.



From here, you will see all of your messages.

Alert list ☆

[Home](#) » [Administration](#) » [Structure](#)

+ Add Alert

Alert ID	Name	Operations
1	Sample Alert	<button>Edit</button>
2	Youth	<button>Edit</button> 

Adding a new alert or pressing the edit button will bring you to this text editor.

[illegible]

From here, you can type the message and add a URL under **Linked Content**. If you do this, when someone clicks on the alert, they will be taken to the section you link. If you do not need a link, use the “#” symbol as the input.

You will also want to set the alert style to ticker if you are using the alert feature that is in the first image.

Alert Style *

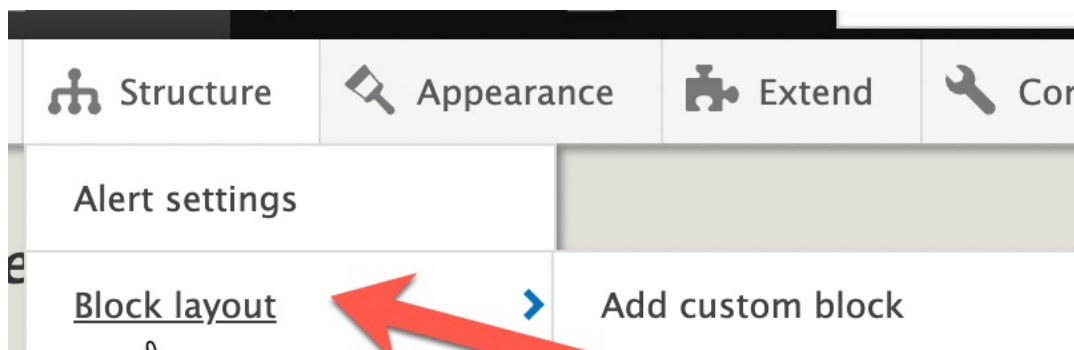
Ticker ▼

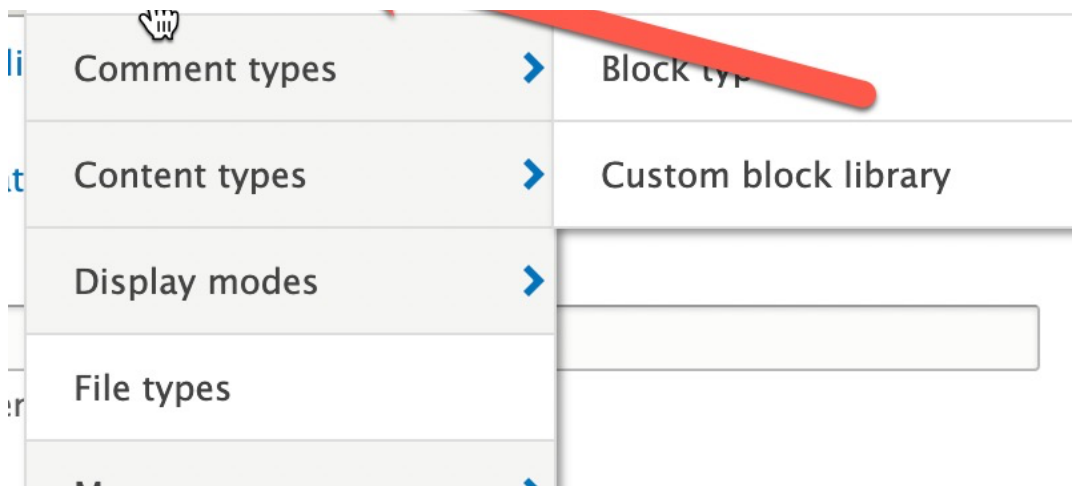
Alert Style *

Ticker ▼

Select how this Alert will be displayed.

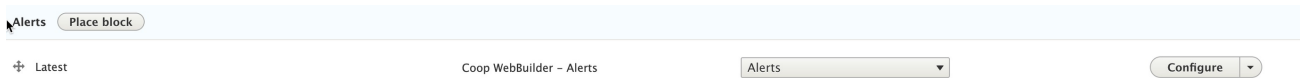
To actually get your alerts to show up, you will need to visit your **Block Structure** page. To get here go to **Structure → Block Layout**.





This section sets the skeleton/template for your website’s appearance. Elements that appear across multiple page, such as your main menu, site logo, and footer, are all placed here. Since alerts need to be seen on every page as part of the header, we would add it here as well.

You will want to scroll to the section for **Alerts**.



If you already have alerts showing on your site, you will see it here. If not, this will be empty. In that case, select **Place block**.

Then, search for Alerts:Ticker and place that.

Place block

+ Add custom block

alerts

BLOCK	CATEGORY	OPERATIONS
Alerts:Notifications	Coop WebBuilder - Alerts	Place block
Alerts:Scrolling	Coop WebBuilder - Alerts	Place block
Alerts:Ticker	Coop WebBuilder - Alerts	Place block

When you place it, some additional settings will appear. Override the title if you want “Latest” to show up. You could also change this to “Urgent” or “Warning” or “Alert” depending on preference.

Configure block

×

Block description: Alerts:Ticker

☒

Display title

Items per block

0 (default setting) ▾

☒

Override title

Title

Latest

Changing the title here means it cannot be dynamically altered anymore. (Try changing it directly in [Alerts.](#))

Press save and you are good to go with using alerts on your website.

19. Additional Best Practices

Here are some recommendations for organizing your work. These are not required, just our suggestions. Please use whatever workflow and practices are best for you.

!! **Managing Files:** As time goes on, your file manager will contain more and more content. Because of this, it is important to keep everything organized. It can get overwhelming if a system is not in place within the content manager.

We recommend naming folders and files with no spaces or special characters. Doing so can have a negative impact on the readability of your files and links.

It is also important to **be consistent** with your file naming structure!

!! **Images:** The larger an image file is, the longer it takes to load your content. Because of this, we recommend using JPG files and avoiding the use of PNG files. PNG files typically are about 20x the size of a JPG and their use is not usually necessary.

The only time we recommend using a PNG file is for your co-op's logo at the top of the page.

If you need a tool for resizing images, we suggest <https://pixlr.com>. This free platform gives you most of the functionality of Photoshop. You can also save images to 50% quality, which will lower your file size. The changes made are not noticeable. <https://pixlr.com>

20. Design Consultations

Design Consultations are FREE for our members! The work required will be handled by our staff, guided by your ideas and wish lists. Since last summer, we have performed over 50 Design Consultations for our 450 members.

Visit our website to request a design consultation today.

Let our team put a fresh coat of paint on your website.

- 1.Kickoff meeting to discover pain points and gather a wish list of changes and additional features.
- 2.Update your site to use our latest Co-op Web Builder theme offering.
- 3.Receive improved mobile responsiveness, new menu options, animation features, easy font settings, and additional design components.
- 4.Meet again to review progress, and next steps if needed.

Enjoy your visual refresh for your website.

21. Spam Prevention

Just for attending this session, we have added new Spam Prevention services to all 50+ of your websites.

You are the first group to receive this new benefit!

This new feature:

- Automatically block users who are performing malicious activity, and add them to the blacklist.
- Block certain e-mail addresses and phrases from being entered in webform submissions.
- Warn users when vulgar or inappropriate content is typed, before the submission occurs.

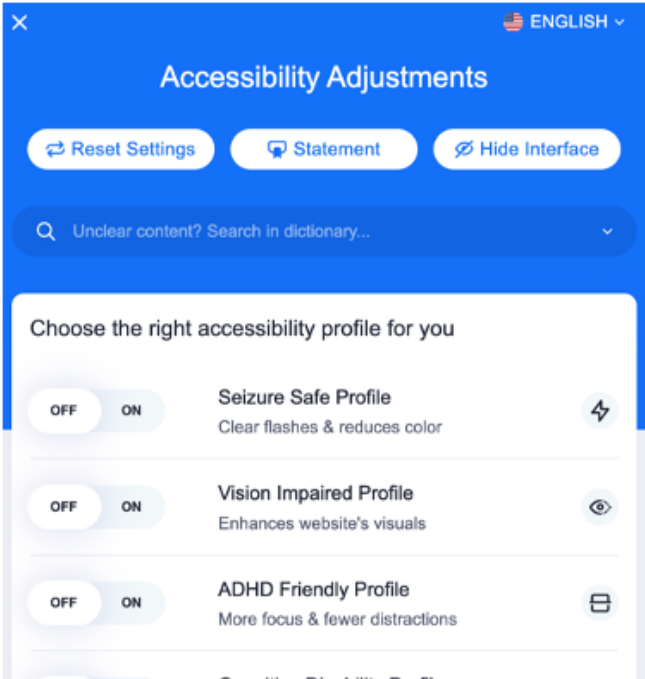
22. Accessibility

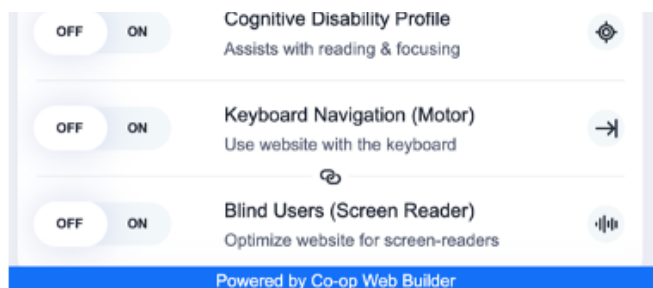
All Co-op Web Builder sites feature new AI functionality as included features. These services will automatically adjust the code on your website in order to meet compliance 24/7/365 (not only on the day when your website launches). We also include a slide-out drawer of tools for your members to use to best experience your website for any assistive needs and allow for any contrast assistance.

No longer will you have to wonder if your website is compliant, because the Co-op Web Builder Accessibility Platform has your back.

Accessibility Plugin

- Accessibility profiles allow 1-click toggle on/off smart features for all member sites.
- Seizure Safe
- Vision Impaired
- ADHD
- Cognitive
- Keyboard Navigation
- Blind
- Users





23. SEO and Social Sharing

Check your posts with Social Share Preview (socialsharepreview.com) to get a glimpse of what your post will look like, prior to sharing on social media.

Note this tool will also show you if you meet the requirements for sharing effectively.

Tip: Images for the web should never be over 8mb, if you aren't meeting the Facebook requirement, you may want to revisit image sizing on your site.



Facebook (Open Graph)

This information tells Facebook more about your pages.

Items like the URL, Site Name, Content Type, Page URL, Title, Description, and Image (even the alt information) is communicated this way.

Without this data, Facebook has no clue how to generate your previews when sharing webpages on social media. It will guess, which may not always lead to the best results.

OPEN GRAPH

The [Open Graph meta tags](#) are used to control how Facebook, Pinterest, LinkedIn and

The Facebook [Sharing Debugger](#) lets you preview how your content will look when it's

Determiner

The word that appears before the content's title in a sentence. The default ignores this val

Site name

[site:name]

A human-readable name for the site, e.g., *IMDb*.

Content type

[node:content-type]

The type of the content, e.g., *movie*.

Page URL

[node:url]

Preferred page location or URL to help eliminate duplicate content for search engines, e.g.

Title

[current-page:title]

The title of the content, e.g., *The Rock*.

Description

[node:summary]

A one to two sentence description of the content.

Image

[node:field_paragraph_blocks]

The URL of an image which should represent the content. The image must be at least 200
Should not be used if og:image:url is used. Note: if multiple images are added many servi
be handled automatically. This will be able to extract the URL from an image field if the fi

Video URL

Twitter Cards

Twitter meta information called Twitter card type. There are multiple styles available, but different requirements for each.

This information tells Facebook more about your pages.

Items like the Description, Title, Page URL, and Image URL (even the alt information) is communicated this way.

Without this data, Twitter has no clue how to generate your previews when sharing webpages on social media.

Tip: Your site is already optimized for Summary Card with large image, which is the best option. No need to change it.

TWITTER CARDS

A set of meta tags specially for controlling the summaries displayed when content is shared i

Twitter card type

Summary Card with large image ▼

Notes:

- no other fields are required for a Summary card
- Photo card requires the 'image' field
- Media player card requires the 'title', 'description', 'media player URL', 'media player width', 'media player height' fields
- Summary Card with Large Image card requires the 'Summary' field and the 'image' field,
- Gallery Card requires all the 'Gallery Image' fields,
- App Card requires the 'iPhone app ID' field, the 'iPad app ID' field and the 'Google Play a
- Product Card requires the 'description' field, the 'image' field, the 'Label 1' field, the 'Dat

Description

[node:summary]

A description that concisely summarizes the content of the page, as appropriate for presentation on Twitter, at the word to 200 characters.

Site's Twitter account

The @username for the website, which will be displayed in the Card's footer; must include the @ s

Title

[node:title]

The page's title, which should be concise; it will be truncated at 70 characters by Twitter. This fi

Page URL

[node:url]

The permalink / canonical URL of the current page.

Image URL

[node:field_media]

The URL to a unique image representing the content of the page. Do not use a generic image such as a logo. Images smaller than 60x60px will not be shown. If the 'type' is set to Photo then the i

Image alternative text

[node:field_media:alt]

The alternative text of the image being linked to. Limited to 420 characters.