Getting Started

Best practices for starting a new site build

Touchstone Energy® Cooperatives

Co-op Web Builder 3
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Co-op Web Builder 3
Getting Started

Building new website with Co-op Web Builder can be exciting.

Let's make sure you have the best guide and practices at the forefront.

Time to take a dip in the lake of content management.

Let's go!

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Co-op Web Builder 3
Getting Started

You will want to begin by gathering all your website's assets somewhere on your computer.

This means, you want to save all images (.gif, .jpg, .png) to a folder. You will also want to grab all your documents (.pdf, .xls, .docx) and place them in the same location.

This will ensure you have all assets ready when you start designing your site.

GET ALL THE LINKZ!

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Co-op Web Builder 3
Getting Started

Use Chrome or Firefox if possible, they have integrated inspector tools and mobile responsive emulators. Any browser will do, but they are the best!

Optional: Download some additional browser plugins to make your life easier.

Web Developer Toolbar (Website Design Tool)
https://chrispederick.com/work/web-developer/

Download Star (bulk file downloading)
https://addons.mozilla.org/en-US/firefox/addon/download-star/

Co-op Web Builder 3
Site URL & Login Process

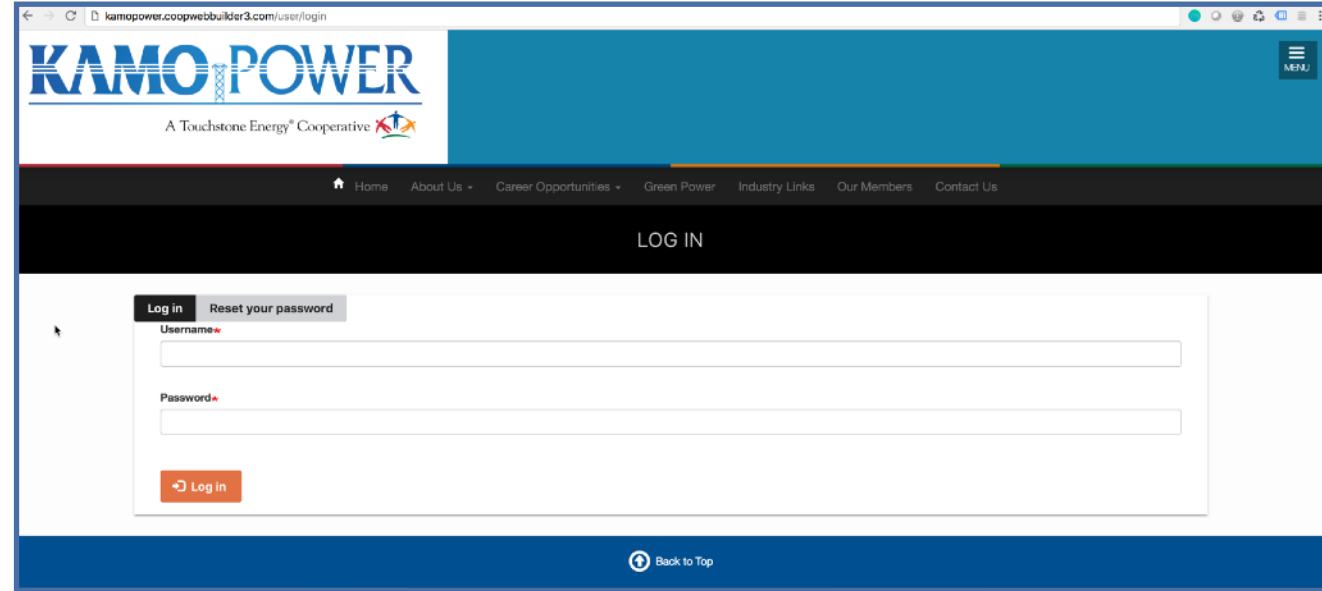Your website will be accessible online, for anyone to view anytime.

This means your boss and coworkers can check out your work anytime you want.

Site URL Pattern:
youraccount.coopwebbuilder3.com

Login anytime by adding a /user/login to your URL as well

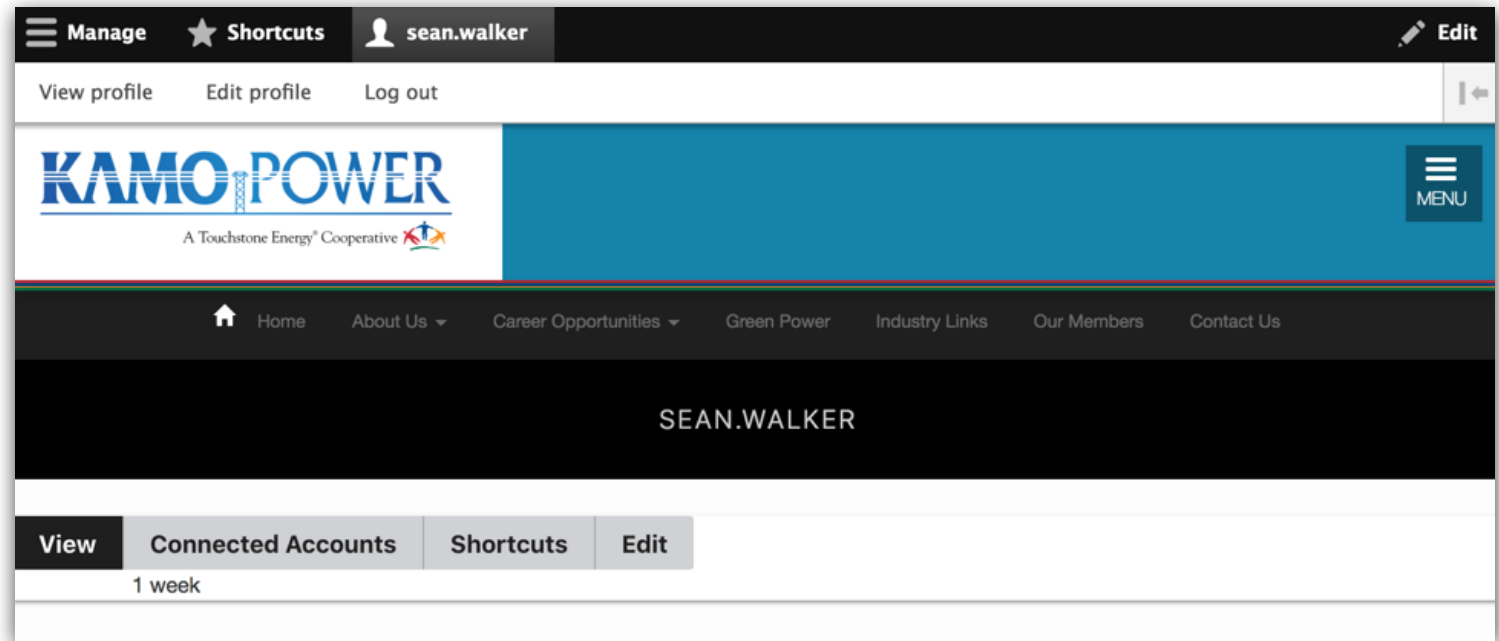(IE: youraccount.coopwebbuilder3.com/user/login)

Co-op Web Builder 3
Best Practices

What happens when you first login?

You land on the "User Account" page.

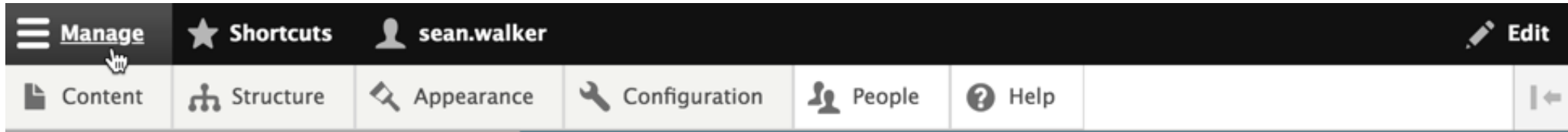This is where you see your username and how long you have been a member of the site.

To get started building your site, click on the site logo or the "Home" link, which is on the main menu.

Co-op Web Builder 3
Best Practices

The Administrative Toolbar

The black stripe at the top of the screen is known as the administrative toolbar.

The Manage link can be clicked on to expand and collapse the secondary line of links.

All links lead to frequently used and useful areas of the content management system.
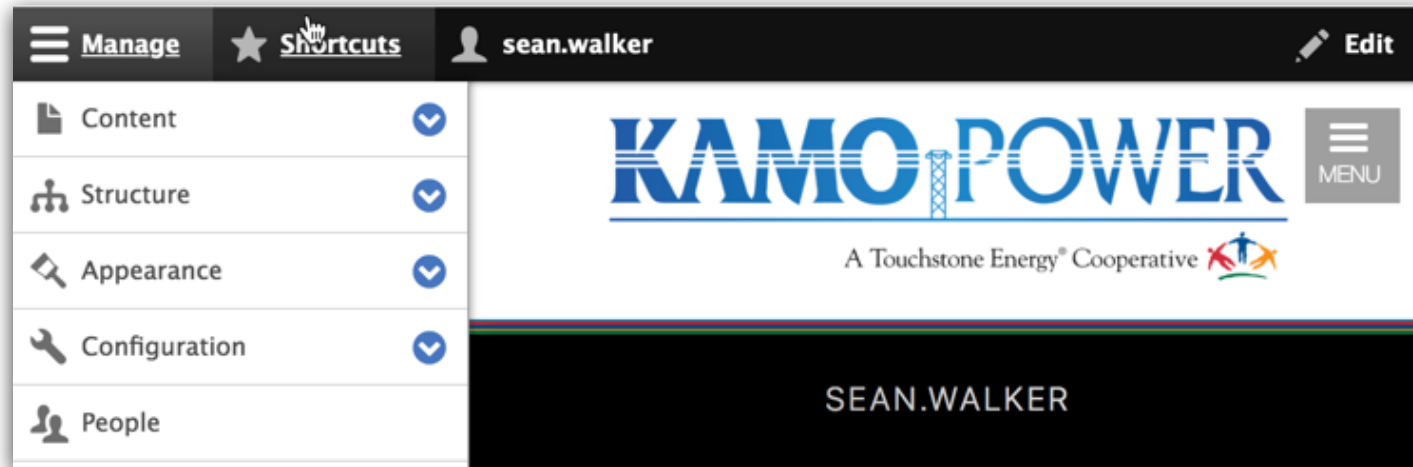
Co-op Web Builder 3
Best Practices
The Administrative Toolbar

The toolbar is responsive, so the editing experience is much improved on a tablet or a phone.

If you need to make a quick update to your site, you can use other devices than your computer to login and make changes.

Co-op Web Builder 3
Best Practices

The Administrative Toolbar

The **Shortcuts** feature should be used to bookmark frequently visited areas of the site.

Click on the *Shortcuts link to expand your existing shortcuts, the list will be empty initially.

Choose **Edit shortcuts** to create a new shortcut.

Co-op Web Builder 3
Best Practices

To make your life easier, create a few shortcuts for practice.

Fill in the Name and Path exactly as shown in the image below.

Co-op Web Builder 3
Best Practices

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Co-op Web Builder 3
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Fill in the Name and Path exactly as shown in the image below.

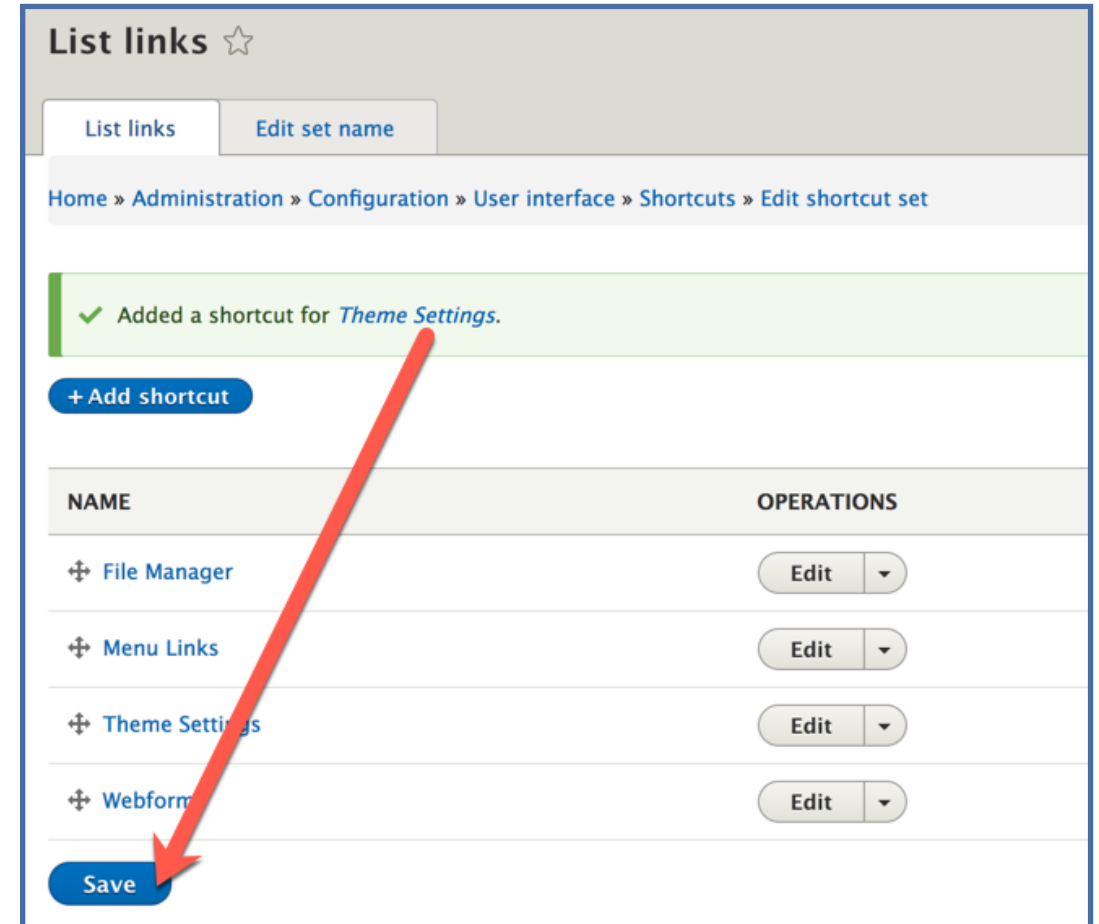Touchstone Energy® Cooperatives

Co-op Web Builder 3
Best Practices
The Administrative Toolbar

You now have some handy shortcut links to the most commonly used areas of the system.

Go ahead and **SAVE** your shortcut set.

- File Manager
- Menu Links
- Theme Settings
- Webforms

Co-op Web Builder 3
Best Practices

To access the shortcuts in the future, use the **Shortcuts** link in your administrative toolbar...it's that simple!

Additional Tips:

- The File Manager can also be found by adding **/imce** to you site URL

- Menu Links can be found under the **Structure / Menus** area, then by choosing **Main Menu**

- Theme Settings can be found under the **Appearance** section and then editing the **Theme Settings** for the CWB Modernized theme

- Webforms can be found under **Structure / Webforms**

Co-op Web Builder 3
Best Practices

Now that you know how to navigate the Administrative Toolbar.

Let's begin by uploading your logo and creating a favicon properly.

Remember that handy **Theme Settings** shortcut we just created?

Go ahead and **click on it now**.

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Co-op Web Builder 3
Best Practices

Scroll down the page until you find the **Logo image** area.

Uncheck the box that says **Use the logo supplied by the theme** this will disable the default TSE logo in the header of the site.

Co-op Web Builder 3
Logo Upload

Click on the **Choose File** button, you will be prompted to select a file from your computer.

Navigate to the folder where you have all your website assets and choose your logo file.

Co-op Web Builder 3
Favicon Generator

A Favicon is the little graphic you see in the tabs of all your websites. There are a variety of Favicons in the image above like NISC SmartHub and the TSE Amigos.

A Favicon can be generated from any image of your choosing.

Head over to https://www.favicon-generator.org/ and generate a Favicon for yourself. You will get a lot of different sized images, so which one do you choose?

Best Practice: You can use your logo image for the Favicon as well, but it may be a little small and hard to see. We suggest making a new image for the Favicon specifically.

Co-op Web Builder 3
Favicon Generator

Once you download your generated icon set, you will need to extract the files to your computer.

There will be quite a few of them available, so which one do you want to use?

If you want your Favicon to show up in the Favorites list on all Apple devices, choose the 144x144 option.

We just did our first best practice – Hooray!

See how nice the NET conference Favicon looks?
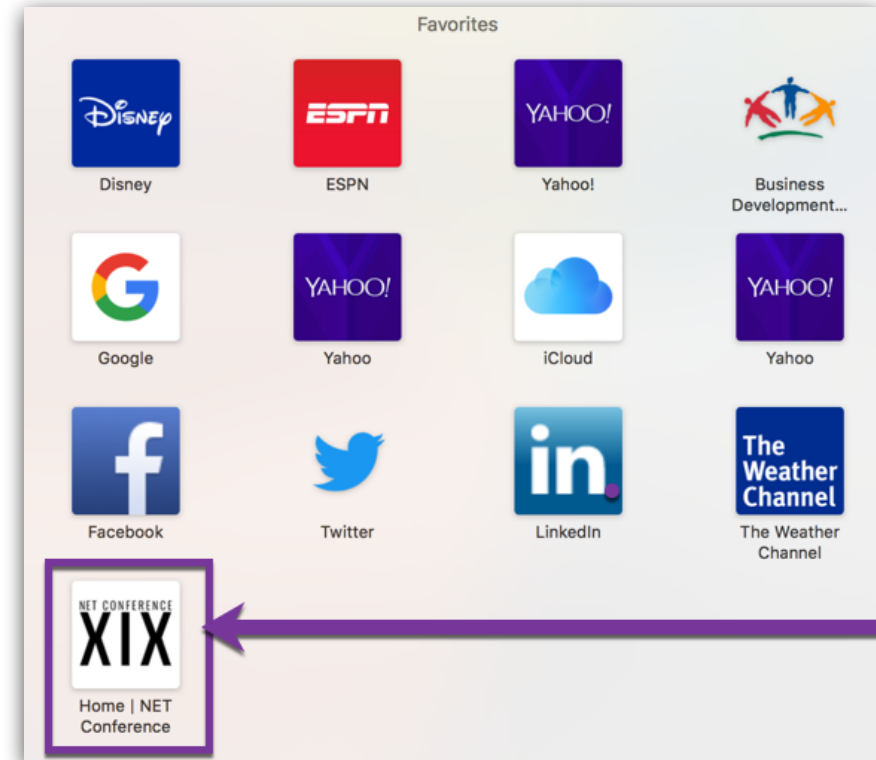
Co-op Web Builder 3
Favicon Upload

Click on the **Favicon** link to the left.

Then once again, use the **Choose File** button. You will be prompted to select a .ico or .png image from your computer.
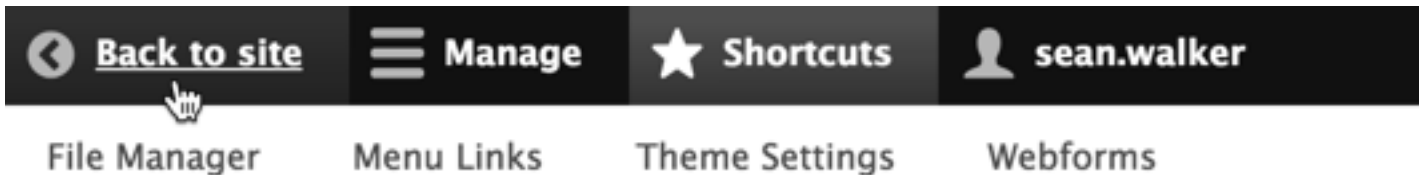
Co-op Web Builder 3
Best Practices

Scroll all the way down, on the page and click on Save configuration, it will be in the very bottom left of the screen.

Save configuration

Click on the **Back to site** link in your Administrative Toolbar to see your homepage.

Co-op Web Builder 3
Best Practices

Now our site is starting to look branded.

We have a sleek logo in place and a nicely generated favicon as well.

Let's move on to the next best practice...use your new Shortcuts to go back to the **Theme Settings** page.
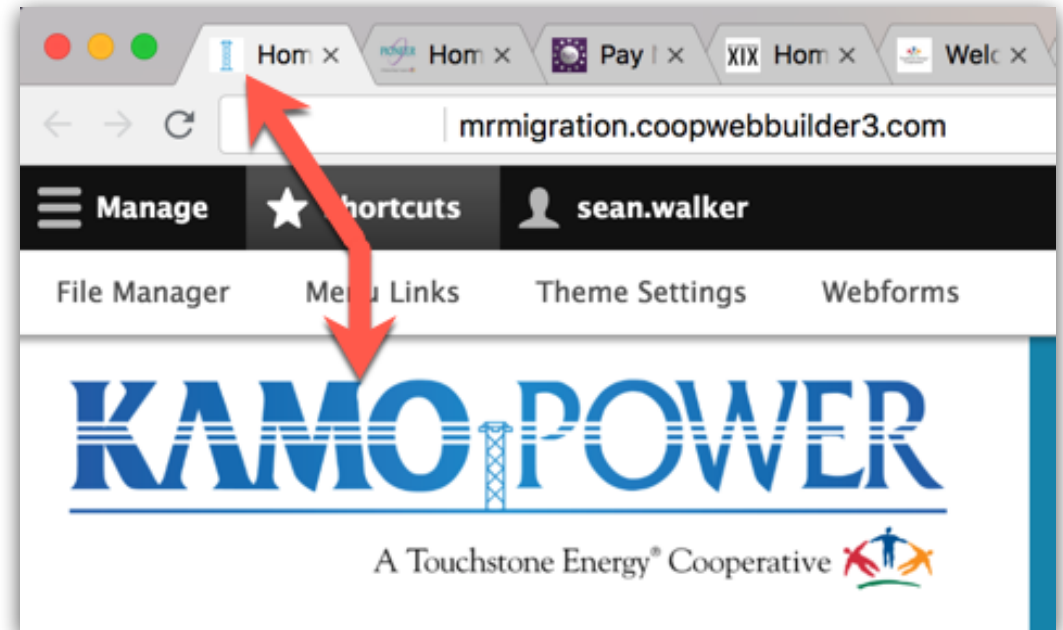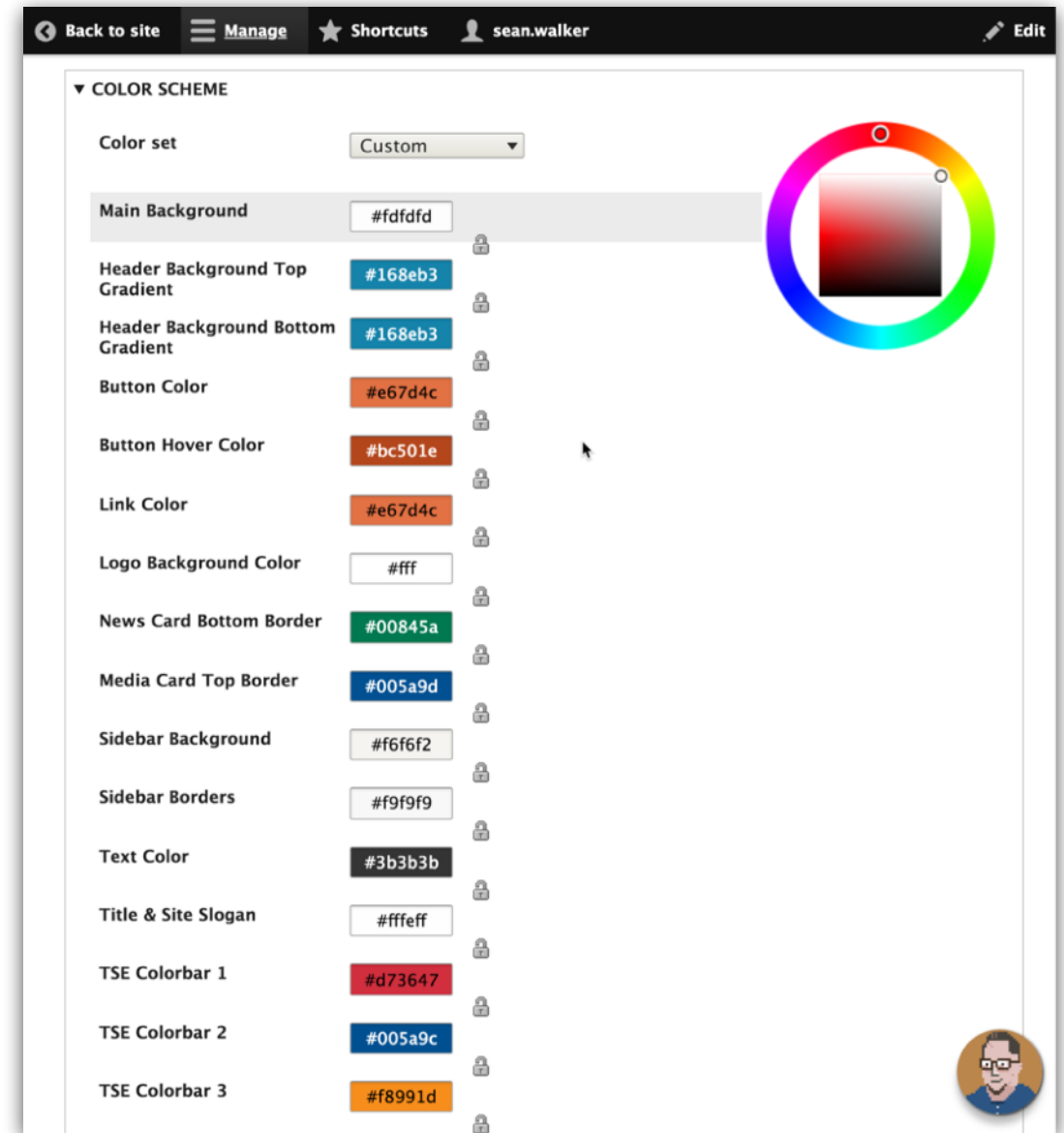
Co-op Web Builder 3
Color Scheme

Scroll down until you find the **Color Scheme** area.

Here you will set your preferred color settings according to your branding.

Use the color wheel to choose a color or enter the exact color hex (#ffffff) into any of the fields.
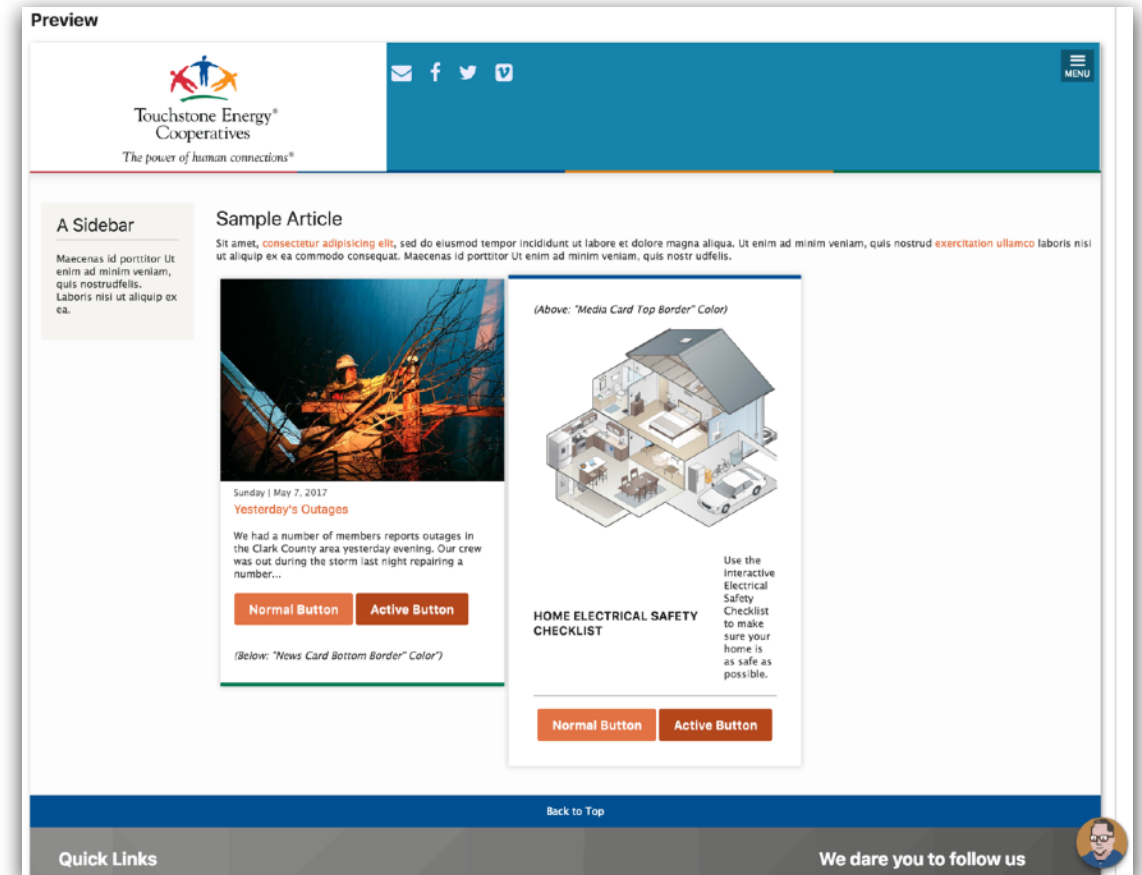
Co-op Web Builder 3
Color Scheme

Scroll down at any time to see a **Preview** of the settings.

There are examples of what buttons look like, news card borders all within the preview window.

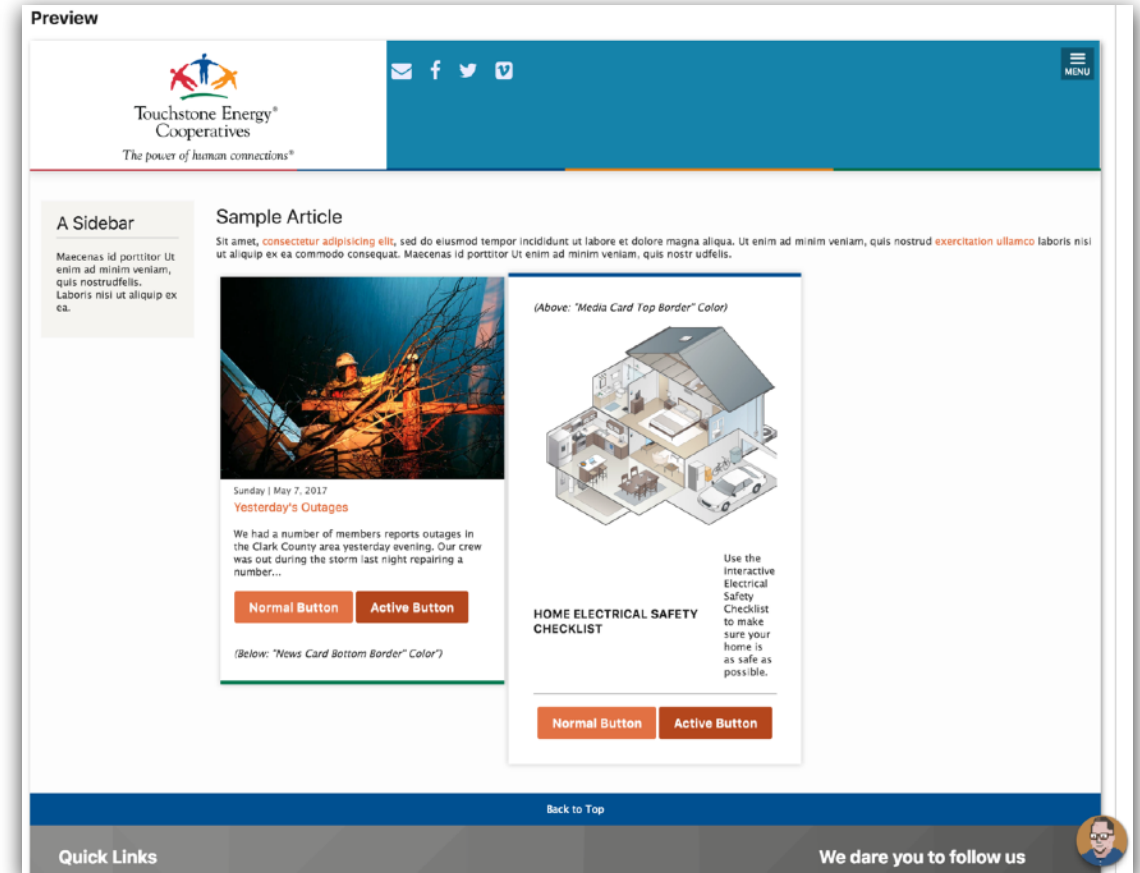When you are happy, save your changes in the bottom left.

Co-op Web Builder 3
Color Scheme

You can now go back to your homepage and see all your selections applied to your website in one swoop. Pretty neat!

You can always go back to **Theme Settings** and modify your colors further, just remember to always save the configuration in the bottom left.
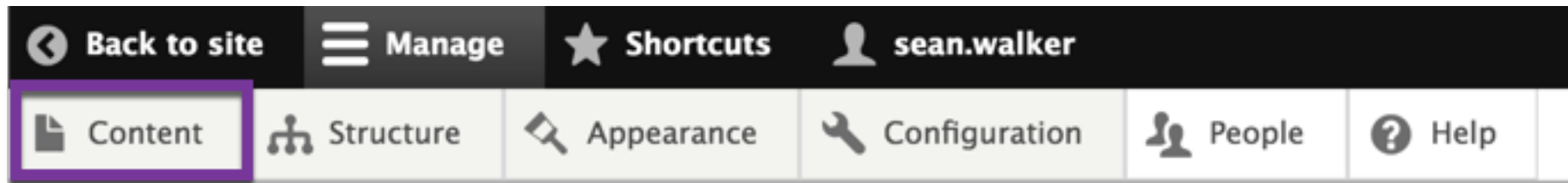
Co-op Web Builder 3
Creating pages & links

Now that your site is decently branded, let's look at some best practices for creating new pages.

Remember the Administrative Toolbar? Let's use it to visit the **Content** area of you site.

If you don't see the Content link, you may have collapsed the secondary list of options. All you have to do is click on **Manage** to bring it back.
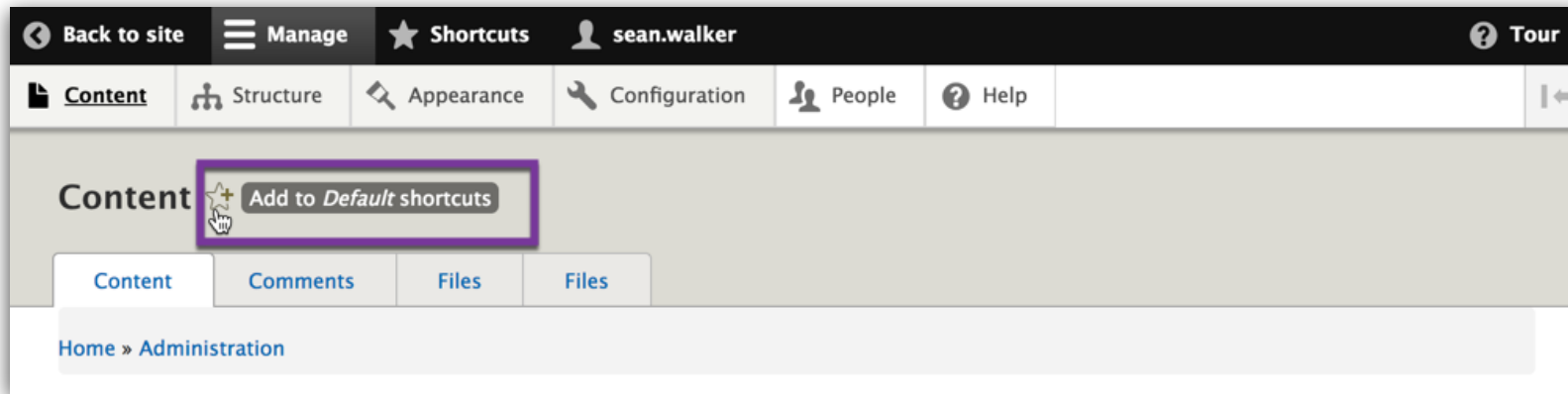
Co-op Web Builder 3
Best Practices

If you hover over the **Star** you will see a pop-up asking if you want to add this area to your default shortcuts.

This is a wonderful way to make shortcuts in the future, whenever you want to bookmark an area of the system.

The Content area is already front and center on the admin toolbar, so no need for a shortcut here, but very useful to know about this feature for other areas of the system you might want a shortcut for.

Co-op Web Builder 3
Best Practices

Welcome to the **Content** area of your site.

This is an area of the system you will visit very often to add pages or find existing pages.

Here you can find any pages on your site and directly edit or delete them. Notice there is a select list of items to choose from if you click the little arrow by the **Edit** link.

If you wish to delete any of the stock articles (IE: About Us) that come installed on your site, you can do that right here.
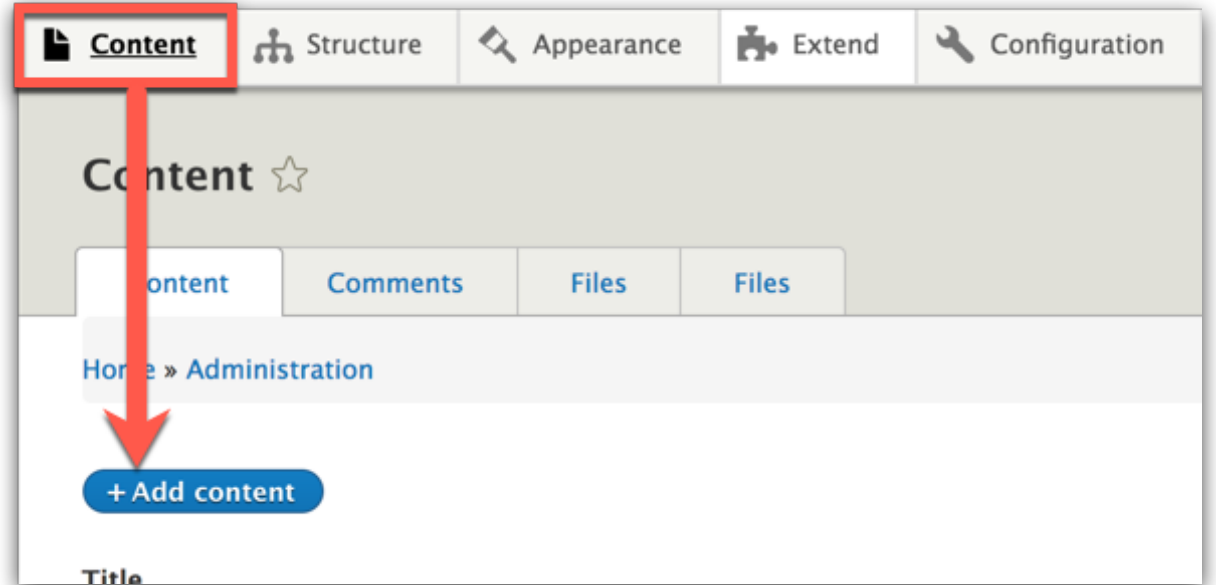
Co-op Web Builder 3
Best Practices

Let's begin by creating a new page.

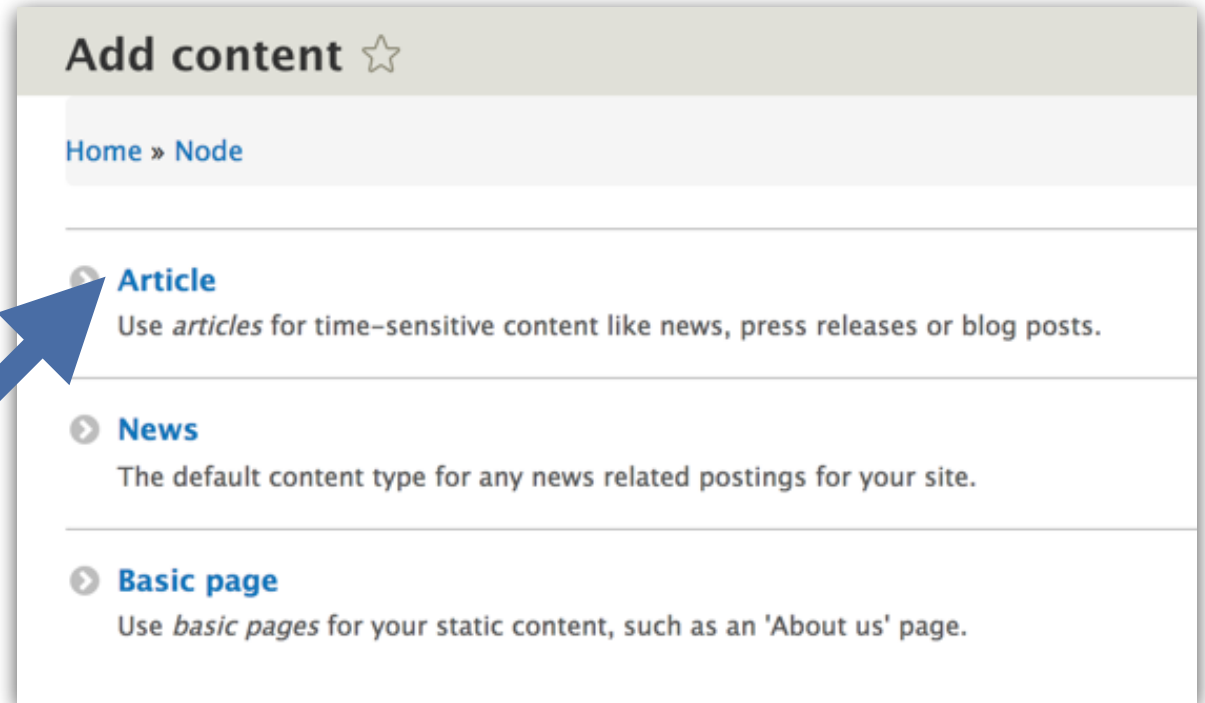Click the blue +Add Content button to add a new page to your site.

Co-op Web Builder 3
Best Practices

Always use the "Article" content type to create pages for your site.

Click on Article now…

Add content ☆

Home » Node

⊙ **Article**
Use *articles* for time–sensitive content like news, press releases or blog posts.

⊙ **News**
The default content type for any news related postings for your site.

⊙ **Basic page**
Use *basic pages* for your static content, such as an 'About us' page.

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Co-op Web Builder 3
Best Practices

Articles have many advantages!

- Component Design tools

- Ability to Change Layout.
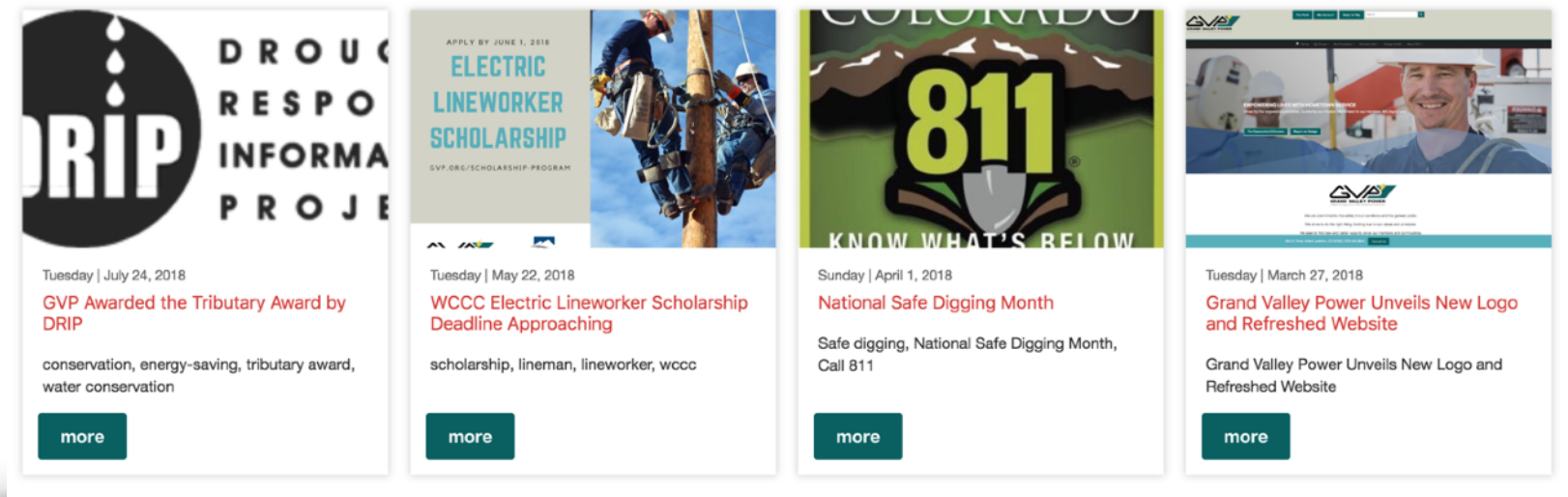
- Drag/drop page editing

- Design content organically
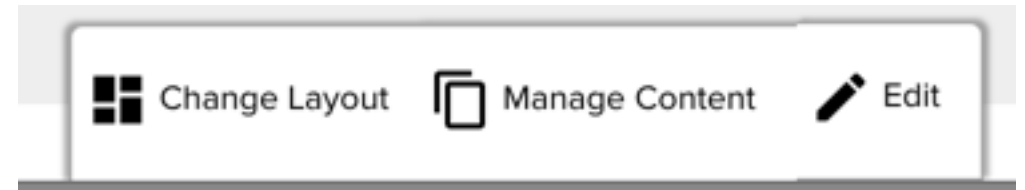
Organic Page Designer

Co-op Web Builder 3
Best Practices

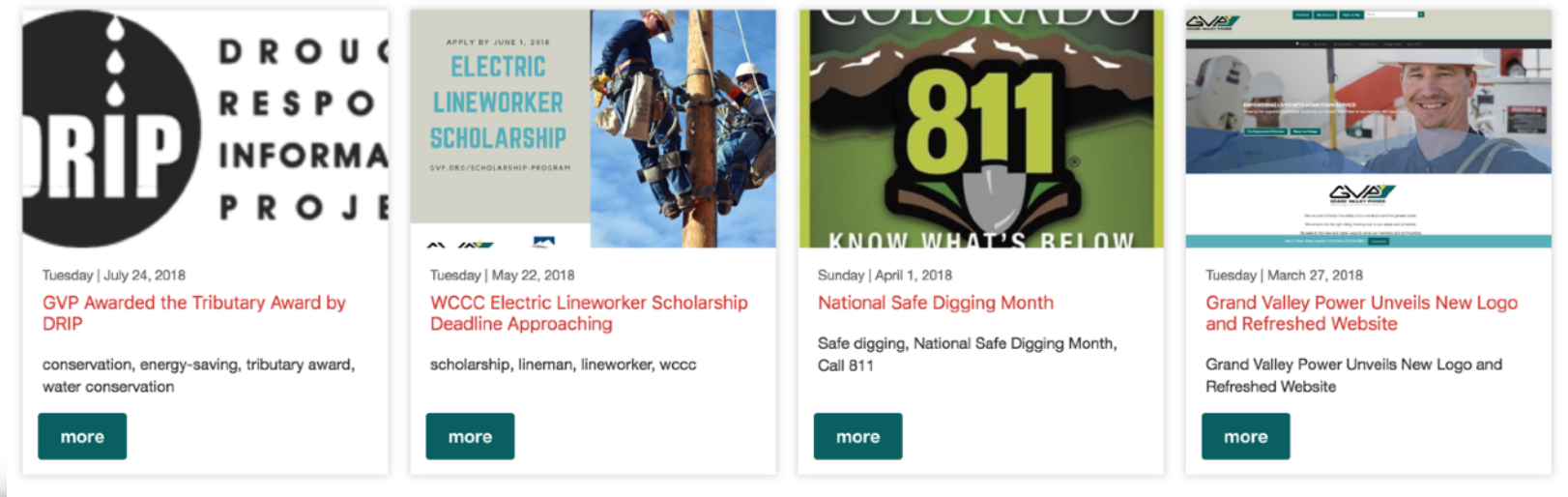Use News Stories for all news stories that you want output as a card on the homepage.

Co-op Web Builder 3
Best Practices

News Card Dimensions

- 660x430 or 1320x860 for super high quality, longer load times

Co-op Web Builder 3
Best Practices

Basic Pages are just that – basic.

They are exactly the same as adding a Basic Page on a Co-op Web Builder 2.0 site.

Like CWB 2.0 they are missing all the extra bells and whistles that CWB 3 brings to your fingertips.

Do not use them, unless you have a good reason.

Sorry basic pages, no streamers for you.
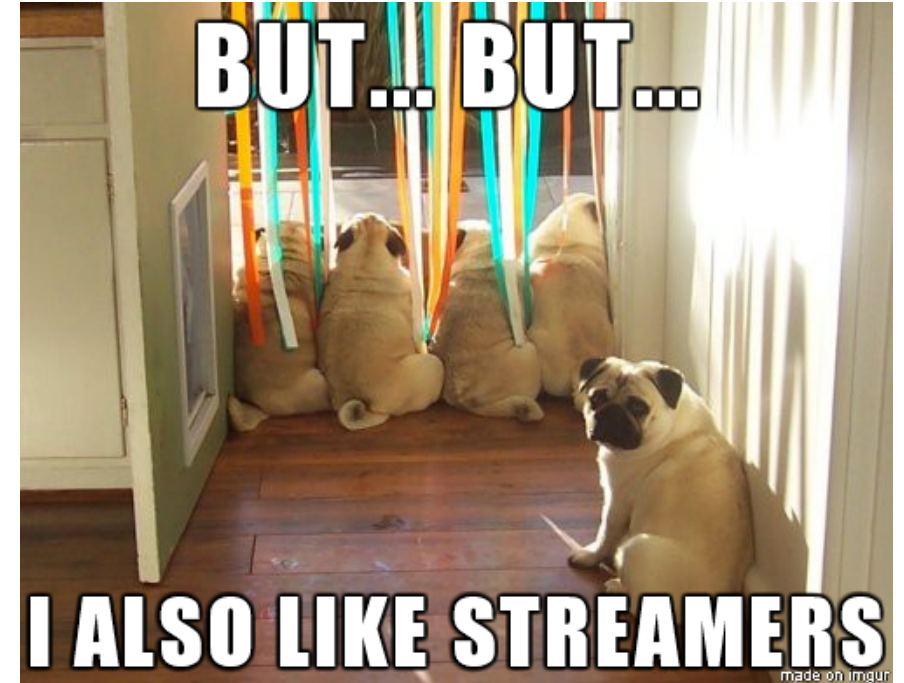
Co-op Web Builder 3
Best Practices

Start simple…

Fill out the **Title**

Place the main content of the page (usually text) in the **Body** area of the page.
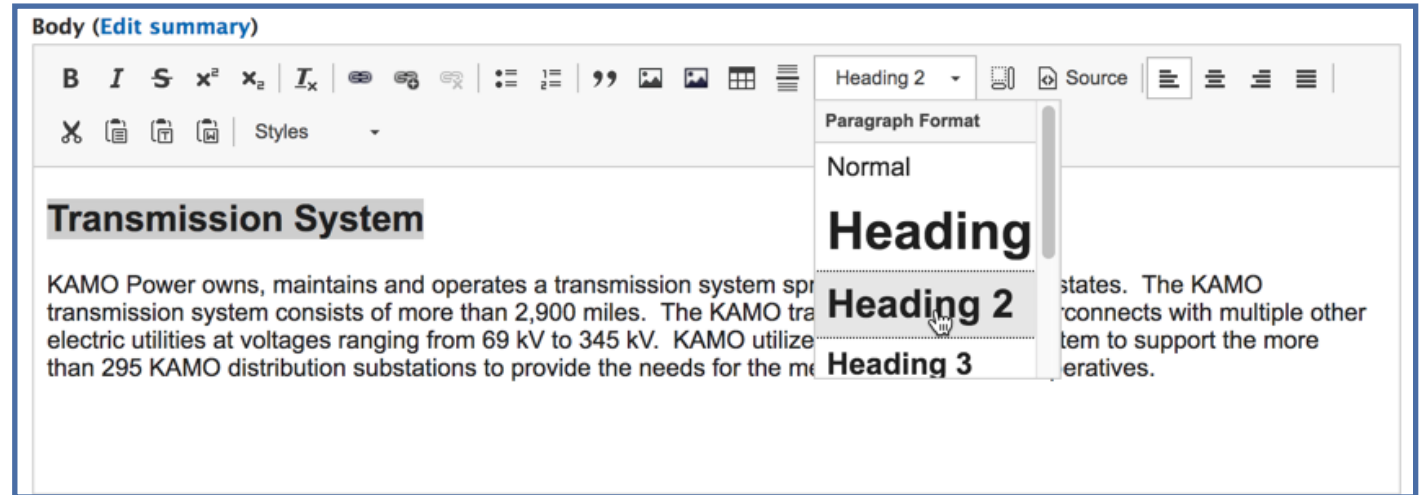
Co-op Web Builder 3
Best Practices

Use the **Paragraph Format** options in the editor toolbar to give your content structure.

In this example, we apply the **Heading 2** to the first area of text on the page.

This adds structure (accessibility points) to the page, because we are using heading elements.

This will make your font stand out more and it is a best practice!

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Co-op Web Builder 3
Best Practices

Use headings properly to form an outline of the page.

They will help any non-visual visitors (including search engines) to understand how the page is organized, and make it easy for screen reader users to navigate your site.

Best practice for web accessibility.

Heading 1
Heading 2
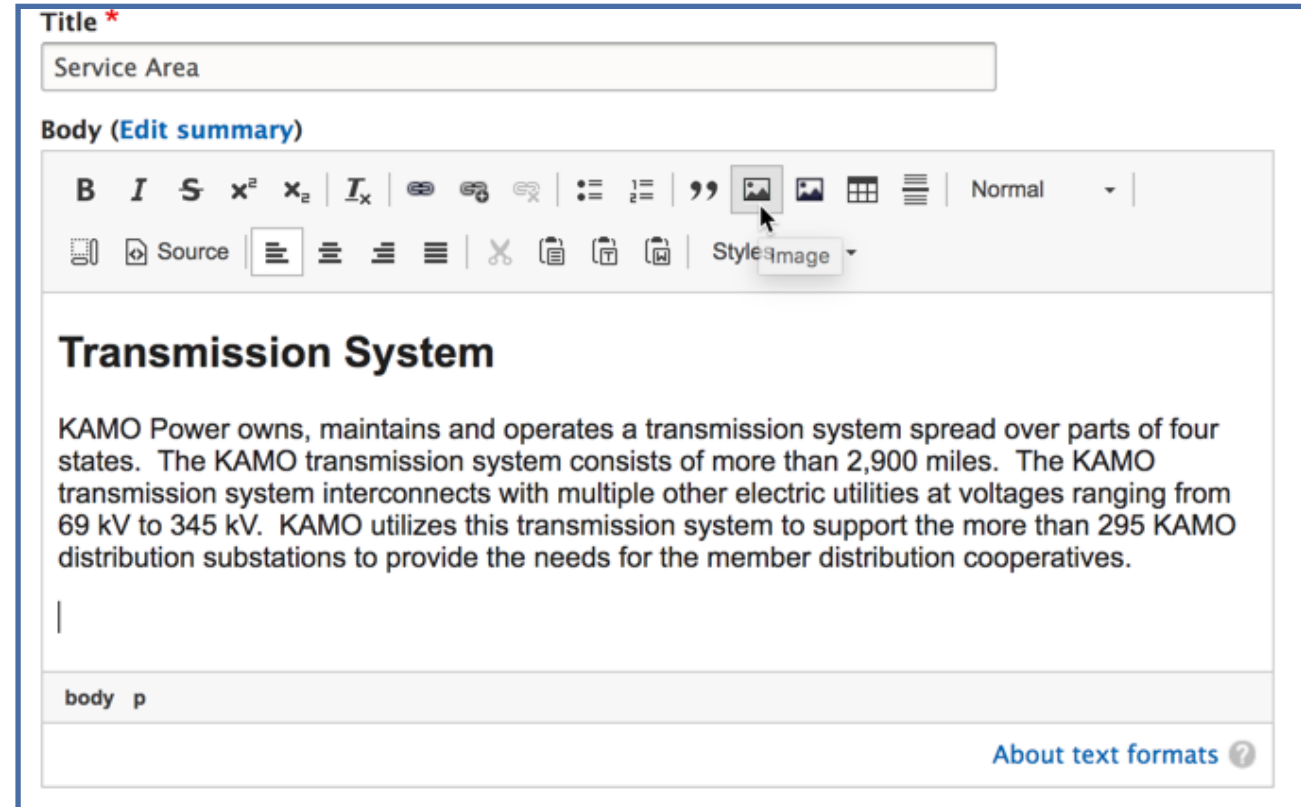### Heading 3
Heading 4
Heading 5
Heading 6

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Co-op Web Builder 3
Best Practices

If you want to insert an image in the **Body** of your page, position your cursor on the page where you want the image to show up.

Then click the first icon that looks like a picture, it should say **Image** if you hover over it.

Title *

Service Area

Body (Edit summary)

B I S x² x₂ | Iₓ | 🔗 🔗 🔗 | ≔ ≟ | 🙶 🖼 🖼 ⊞ ≡ | Normal ▾ |

⬛ ◈ Source | ≡ ≡ ≡ ≡ | ✂ 📋 📋 📋 | Styles Image ▾

Transmission System

KAMO Power owns, maintains and operates a transmission system spread over parts of four states. The KAMO transmission system consists of more than 2,900 miles. The KAMO transmission system interconnects with multiple other electric utilities at voltages ranging from 69 kV to 345 kV. KAMO utilizes this transmission system to support the more than 295 KAMO distribution substations to provide the needs for the member distribution cooperatives.

|

body p

About text formats ❓

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Co-op Web Builder 3
Best Practices

Now use the **Choose File** button to select an image from your computer.

The system will upload the image to your file manager for you (bonus)!

Fill out the required **Alternative Text**, this is how you get a better web accessibility score.

Co-op Web Builder 3
Best Practices

Go ahead and align the image (if you want) or just click **Save** to insert it on the page.

Tip: You can also add an optional Caption, which will full width the image and also add a caption box below it.

Insert Image
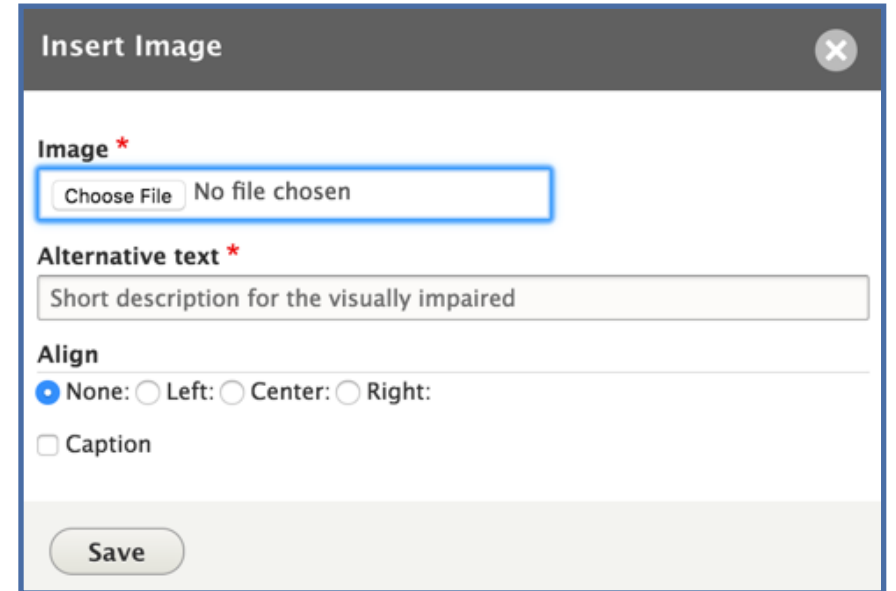
Image *
Choose File | No file chosen

Alternative text *
Short description for the visually impaired

Align
● None: ○ Left: ○ Center: ○ Right:
☐ Caption

Save

Co-op Web Builder 3
Best Practices

If your image is too large, you can locate the bottom right of it and hover over the image.

This will show a black square which will let you drag to resize the image smaller/larger.

Tip: If you selected Caption, there will be a yellow highlighted region at the bottom of the image. This is where you would type in a caption.
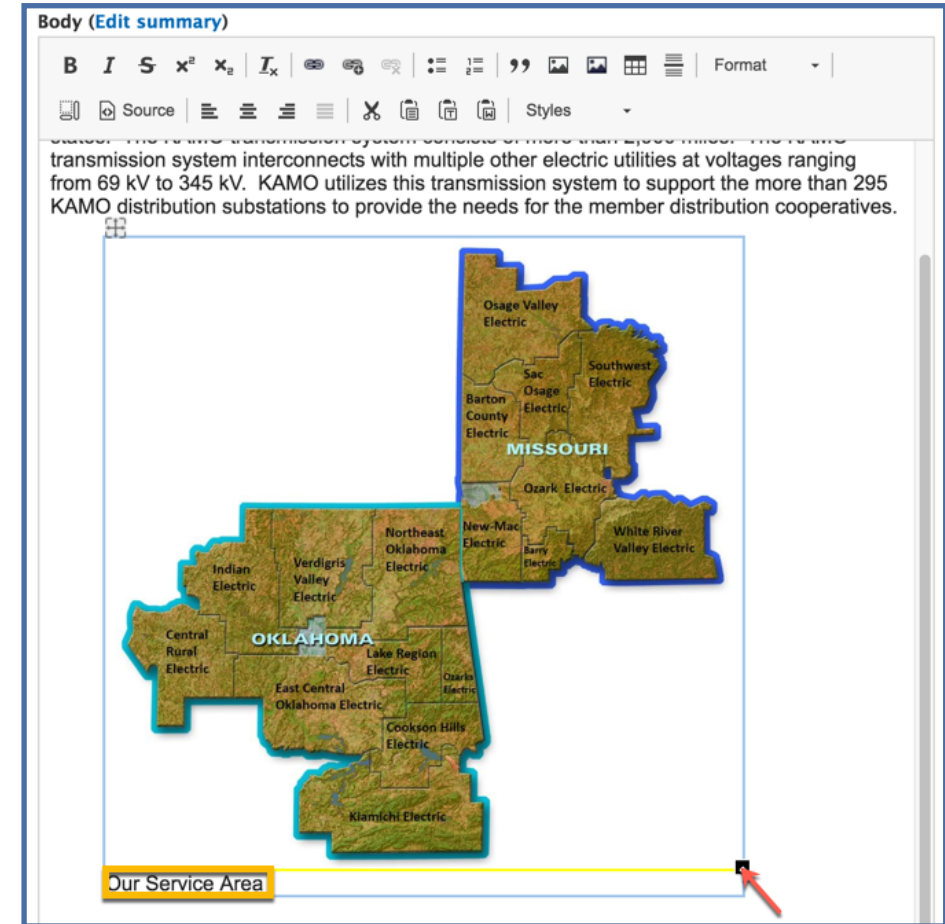
Co-op Web Builder 3
Best Practices

Now that our page has some nice text with a heading and an image, let's go ahead and save our progress.

Scroll down to the bottom of the editing interface until you see this button set.

Save and keep published ▼   Preview   Delete

Click on **Save and keep published**.

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Co-op Web Builder 3
Best Practices

After saving your page, you will be redirected to actual website to view the page live.

The system will communicate with you via messages.

A green message will show you success that the new Article (page) has been created.

Click on **Edit** again to return to the traditional page editor.

SERVICE AREA

Article *Service Area* has been created.

View   Edit   Delete

Transmission System

KAMO Power owns, maintains and operates a transmission system spread over parts of four states. The KAMO transmission system consists of more than 2,900 miles. The KAMO transmission system interconnects with multiple other electric utilities at voltages ranging from 69 kV to 345 kV. KAMO utilizes this transmission system to support the more than 295 KAMO distribution substations to provide the needs for the member distribution cooperatives.

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Co-op Web Builder 3
Best Practices

Click on **Menu Settings** to see additional options for creating a menu link.

Check the box to **Provide a menu link**.

Change the **Menu link title** if you like, as it will automatically copy itself from the title of the page.

The **Weight** option determines the order that the links appear in a drop-down, you can skip this option.

Co-op Web Builder 3
Best Practices

You can also set the **Parent Item** here. The **Parent Item** tells the menu link where exactly on your main menu it should live.

The **Service Area** page we just created will now appear under the About Us menu, because we selected the **About Us** link.

If you wanted the page to appear on the main menu directly, select the **<Main navigation>** link.

Let's scroll all the way to the bottom and **Save and publish** our page again.

▼ MENU SETTINGS

☑ Provide a menu link

Menu link title

Service Area

Description

<Main navigation>
-- Home
✓ -- About Us
---- KAMO Power Annual Report
---- Power Supply
---- Service Area
---- Structure
-- Career Opportunities
---- Current Open Positions
---- Nondiscrimination Statement
-- Green Power
-- Industry Links
-- Our Members
-- Contact Us
-- Together We Save (disabled)

Save and keep published ▼   Preview   Delete

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Co-op Web Builder 3
Best Practices

We now have a brand new Article (page) added to the site AND we have added it to the menu as a drop-down link under the About Us page.
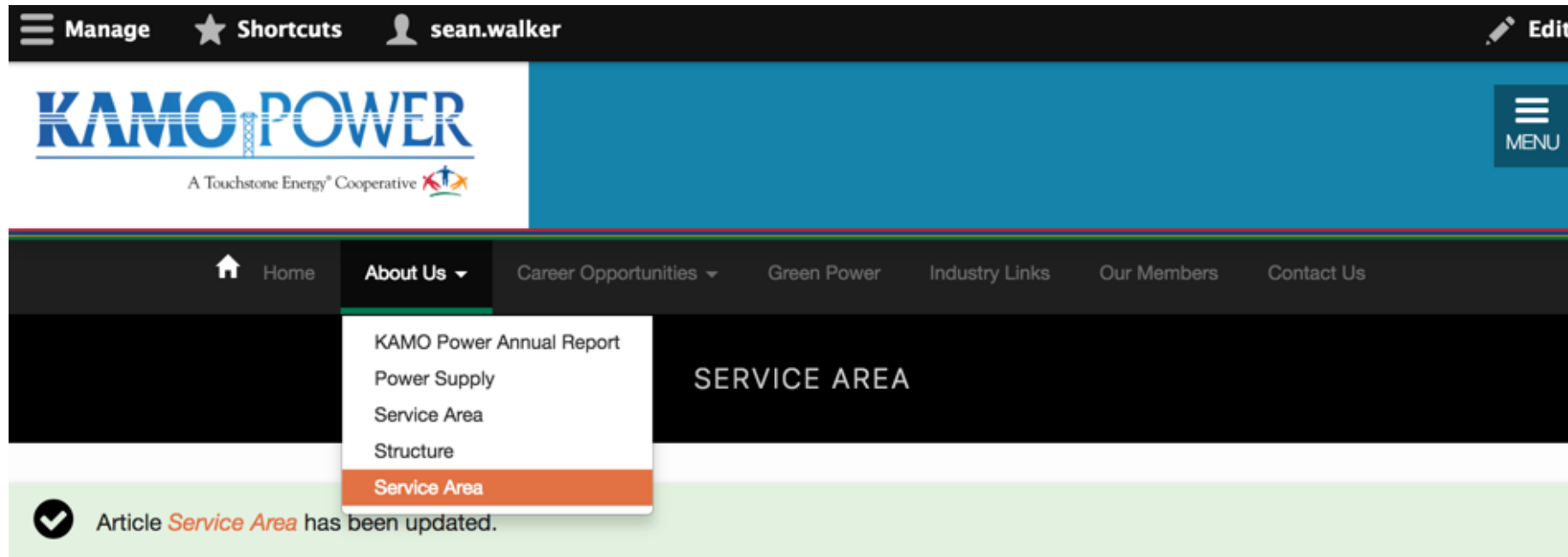
Co-op Web Builder 3
Creating pages & links

Now would be the time to create all pages for your site and place them all on the menu.

Don't worry about being too neat, we will move the links around later.

Once you have finished creating all pages for your site (as articles), click on your **Menu Links** shortcut.

Co-op Web Builder 3
Creating pages & links

The **Menu Links** shortcut will bring you directly to the area where you can build your main menu.

Here you will see all your pages and links that you added to your menu.

Use the Crosshair icon to reorder your links.

Tip: Indent links to make them child pages of another link.

Co-op Web Builder 3
Creating pages & links

Also, notice there is an **Enabled** column, which you can use to disable a link as well.

If you want to edit or delete a link, the **Operations** column will let you do those tasks.

Go ahead and reorder and indent your links, I will wait for you patiently.

Save your changes when you are ready.

Co-op Web Builder 3
Homepage Design

Go back to the Homepage either by clicking on your Logo or the **Home** link on your main menu.

See the nifty designer tools at the bottom of the screen?

These are the page designer tools, which can do a multitude of tasks.

I like to call this organic design, because you can now design your pages as a painter paints a canvas – while you are looking at it!

Click on **Manage Content** to get started.

Co-op Web Builder 3
Homepage Design

For now, let's choose the first option called **Create Content**.
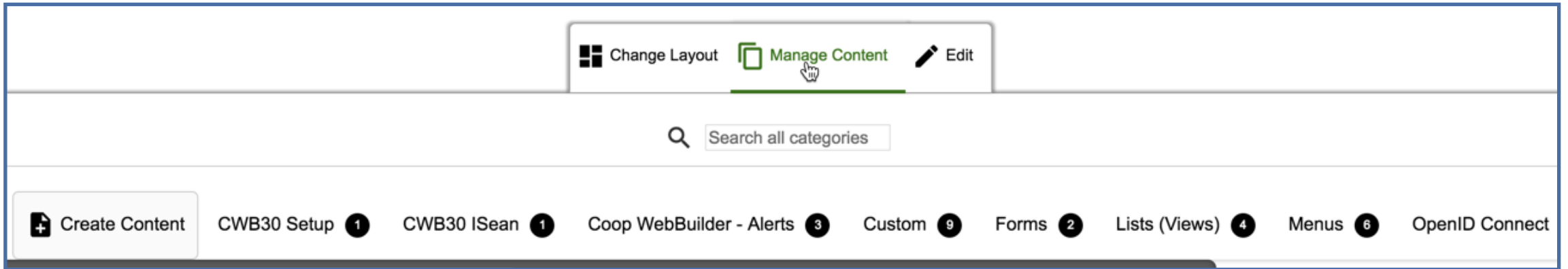
Co-op Web Builder 3
Homepage Design

This will display a collection of buttons for all the different **components** that you can create with the page designer.

Everything from an animated **Timeline** to a **Infographic** is available right here.
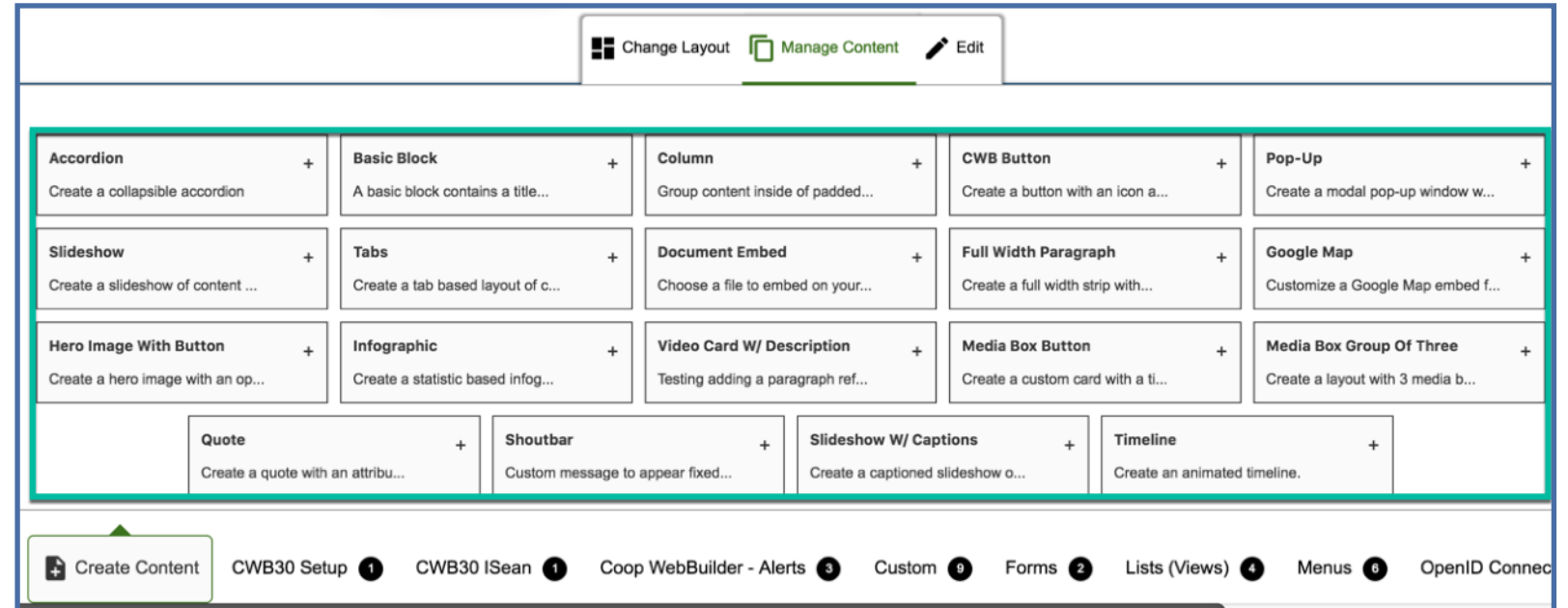
Tip: If you would like to see DEMOS of the various components visit

https://www.coopwebbuilder3.com/components for more details.

Co-op Web Builder 3
Homepage Design

Each component will present you with a variety of options to configure. None will require you to code.

Go ahead and select the option that says **Slideshow w/ Captions**
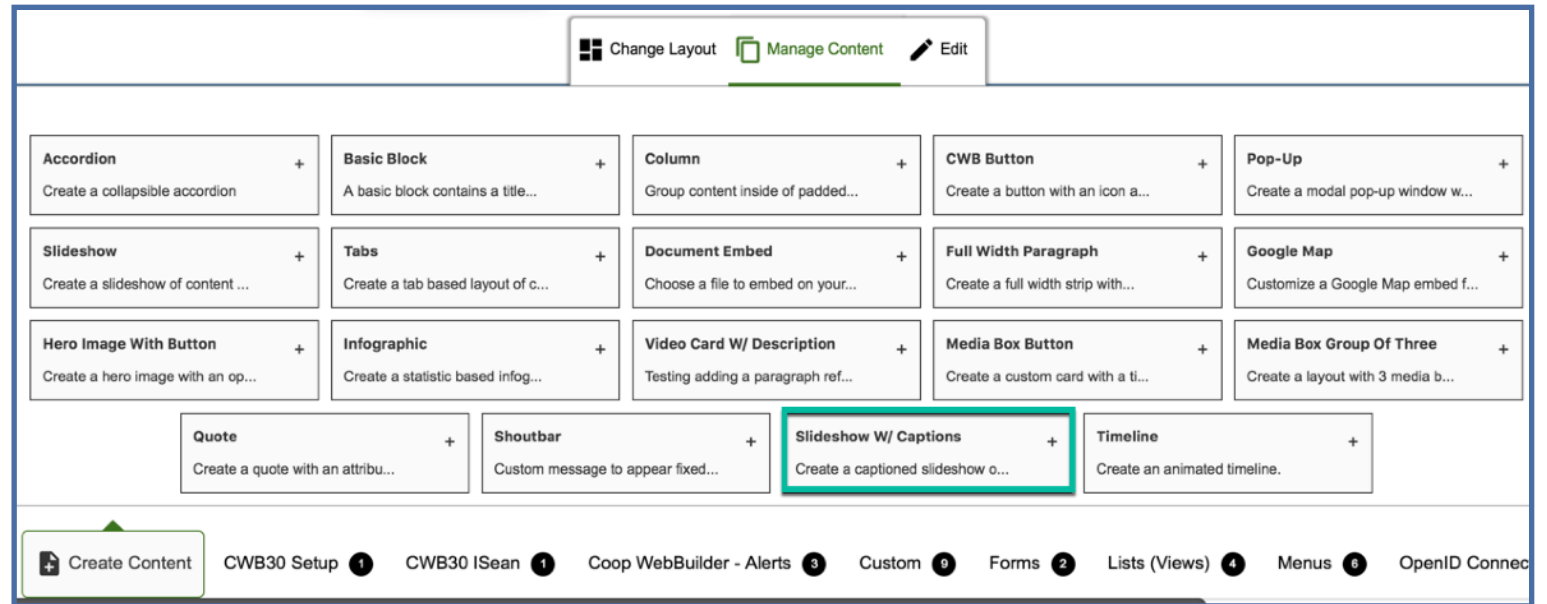
Note: Depending on you screen size it may be in a different spot than the screenshot.

Co-op Web Builder 3
Homepage Design

Every component will require a **Block Description**.

A good way to approach this is to title each block as something you will remember later.

Since we are making a Slideshow for the homepage, let's call it **Homepage - Slideshow**, so we can easily spot it later on.

CREATE NEW SLIDESHOW W/ CAPTIONS CONTENT

BLOCK DESCRIPTION✶

Homepage - Slideshow

Slideshow Captioned

🗑 Remove

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Co-op Web Builder 3
Homepage Design

Each component will present you with different configuration options.

The **Slideshow w/ Captions** will ask you if you would like a **background** color, to set the **width**, and also a **slide interval**.

Feel free to adjust these as needed.

For now, let's go with the default settings.

BACKGROUND

- None -

WIDTH

Full Screen

SLIDE INTERVAL

5 Seconds

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Co-op Web Builder 3
Homepage Design

In the next section, we need to tell the component what type of content we would like to show in the slideshow.

Choose the **Add Slideshow Image** option.

This will insert a **Slideshow Image** component into your **Slideshow w/ Captions.**

Tip: You can add any number of Slideshow Images to the Slideshow w/ Captions component, but it's best not to mix video cards with slideshow images, etc. Stick one choice and stay with it.
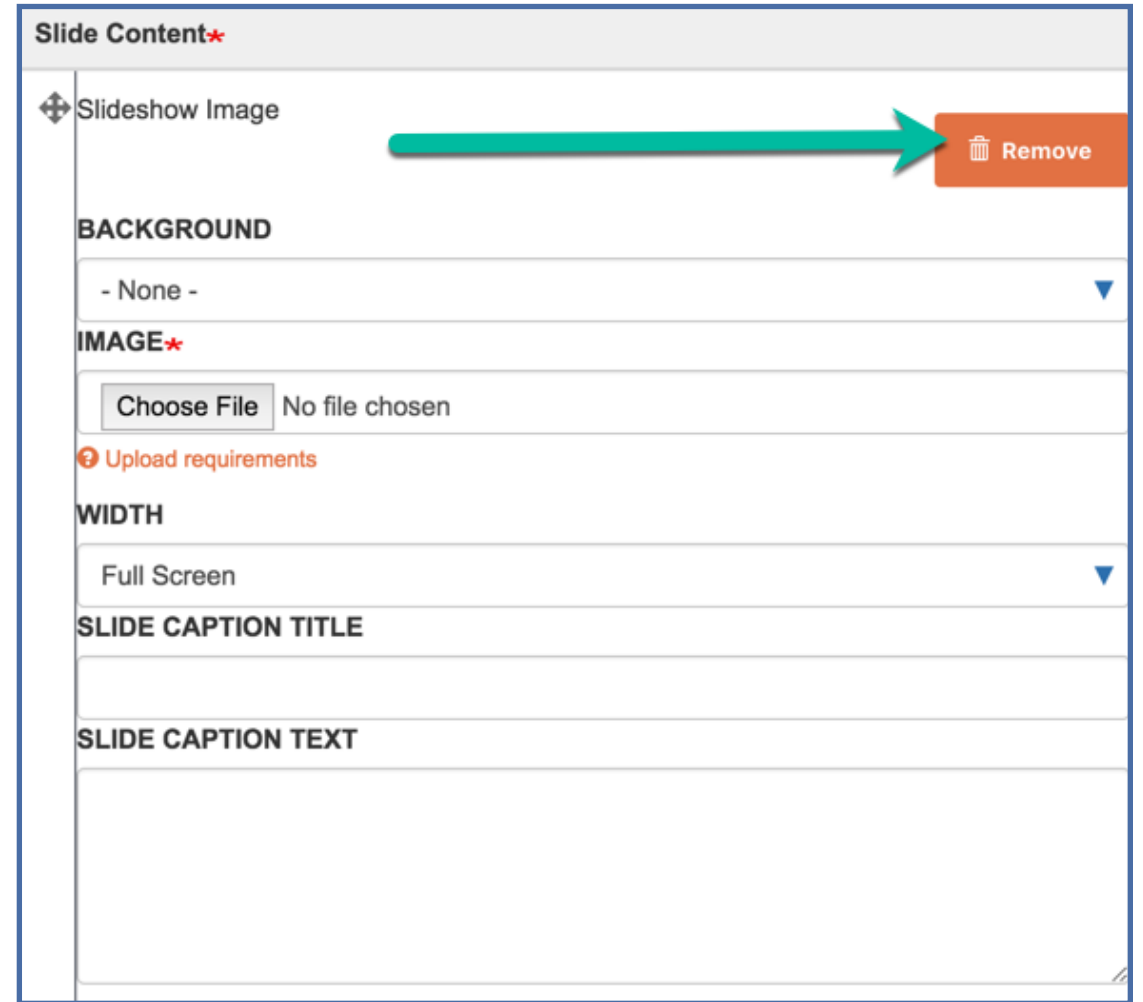
Co-op Web Builder 3
Homepage Design

Notice the big **Remove** button?

You can use this anytime to safely remove a component from your configuration.

Let's say you added a video slide by accident, easily undo that setting with the remove button.

Slide Content*

Slideshow Image

🗑 Remove
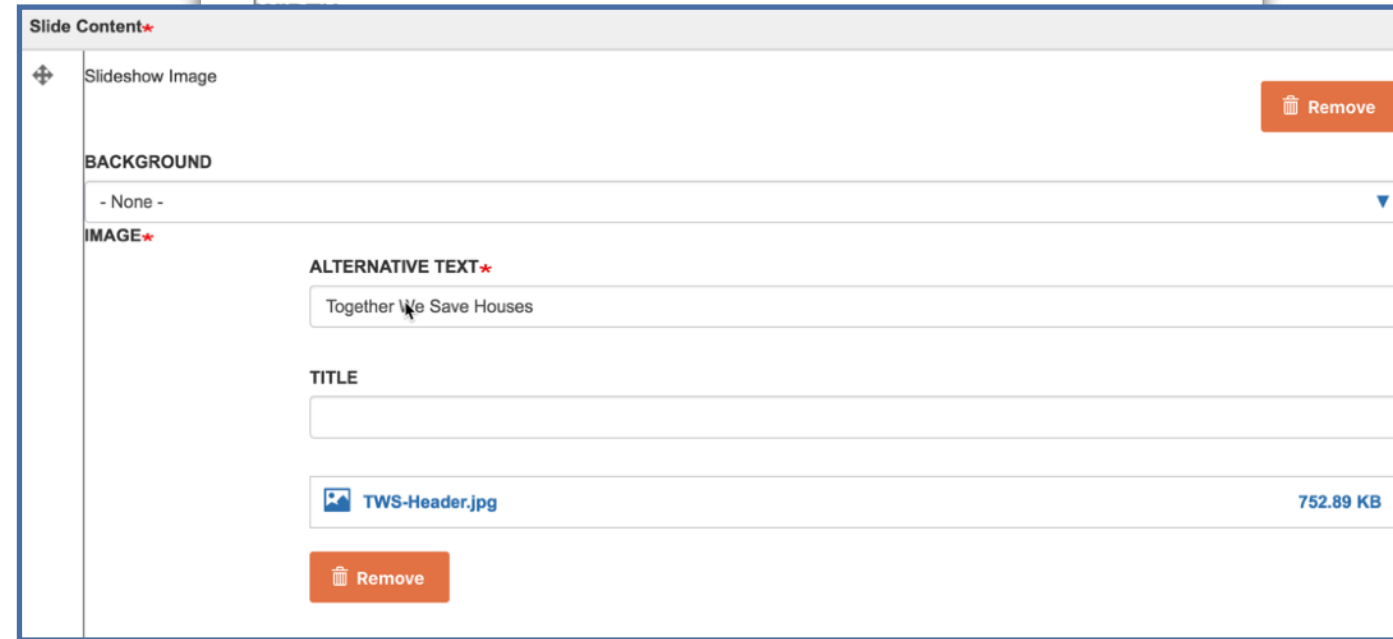
BACKGROUND

- None -

IMAGE*

Choose File   No file chosen

❓ Upload requirements

WIDTH

Full Screen

SLIDE CAPTION TITLE

SLIDE CAPTION TEXT

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Co-op Web Builder 3
Homepage Design

Click the **Choose File** button to select an image from your local computer.

Make sure to fill out the **Alternative Text** when prompted. A Title is usually not needed and is optional.

Slide Dimensions

1920x400(500,600,700)

Choose a height and be consistent, 1920x600 is a good standard.

Co-op Web Builder 3
Homepage Design

Enter an optional **Slide Caption Title** and **Slide Caption Text**.

There is a width setting for each individual slide you add to the slideshow. The default option should usually be best choice.

WIDTH

Full Screen ▼

SLIDE CAPTION TITLE

Together We Save

SLIDE CAPTION TEXT

Learn how you can save energy and money today|

Co-op Web Builder 3
Homepage Design

Each **Slideshow Image** comes with an optional **Slide Button**. If you do not want a button, you can use the big **Remove** button to remove it.

Tip: you can add more than one button by using the big **Add Button** option.

Tip: the button feature is unlimited, so you could have 5 buttons if you wanted!

Co-op Web Builder 3
Homepage Design

Start typing the name of the page you want the button to link to in the **Button URL** field.

When you see it appear, select it from the list of options.

If you want to link to an external website, simply type in the full URL here (IE: https://www.coopwebbuilder.com).

Co-op Web Builder 3
Homepage Design

Notice how the **Button URL** changed to Together We Save (4). This is the system telling itself that the fourth item on your site is the Together We Save page.

Set a **Button Label**, for what you want the button text to display.

Best Practice:

Make links using this approach, instead of manually typing the URL in the field. This will ensure that the link will never get broken, even if you renamed the original page!

Never include the mysitename.coopwebbuilder3.com in your links, because that URL won't exist once you are live!

Slide Button

Button

Remove

BUTTON URL

Together We Save (4)

BUTTON LABEL

Energy Savings

BUTTON TITLE

Describe what happens when you click on the button. This increases accessibility for your users!

Button Target Type
- ○ N/A
- ○ _SELF
- ● _BLANK

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Co-op Web Builder 3
Homepage Design

Finally, set the **Button Target Type**
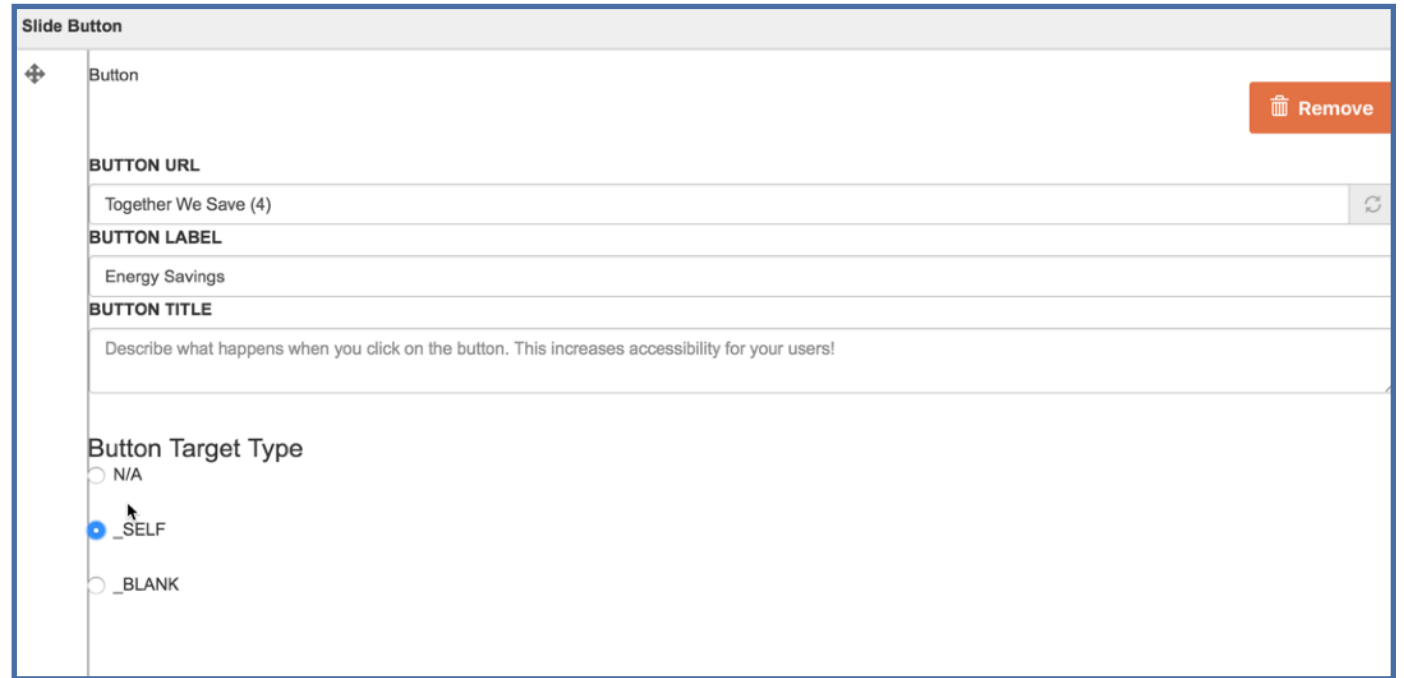
Select **_SELF** to open in the same tab

Select **_BLANK** to open in a new tab

Best Practice:

A button title is optional, but can help increase accessibility.

You can type in a description of what happens when you click the button.

Co-op Web Builder 3
Homepage Design

That's it!

We should now have a slideshow with one slide image and a title, supplemental text and a button!

Scroll down to the bottom and choose **Create and Place** from the in-page designer tool.

Create and Place

Co-op Web Builder 3
Homepage Design

The following screen wants to know how you would like your component to display on the page.

You can change the **Title** if you like, but let's keep it the same for now.

Uncheck the **Display Title** box.

Don't worry about the region, because we can drag/drop move it around the page next.

Click the **Add** button.

CONFIGURE HOMEPAGE - SLIDESHOW BLOCK

BLOCK DESCRIPTION Homepage - Slideshow

TITLE★

Homepage - Slideshow

☑ DISPLAY TITLE

REGION★

Header ▼

Add   👁 Toggle Preview

Co-op Web Builder 3
Homepage Design

You will now be on your homepage.

Congratulations!

The new slideshow should already be in place in the **Header** region of the page layout.
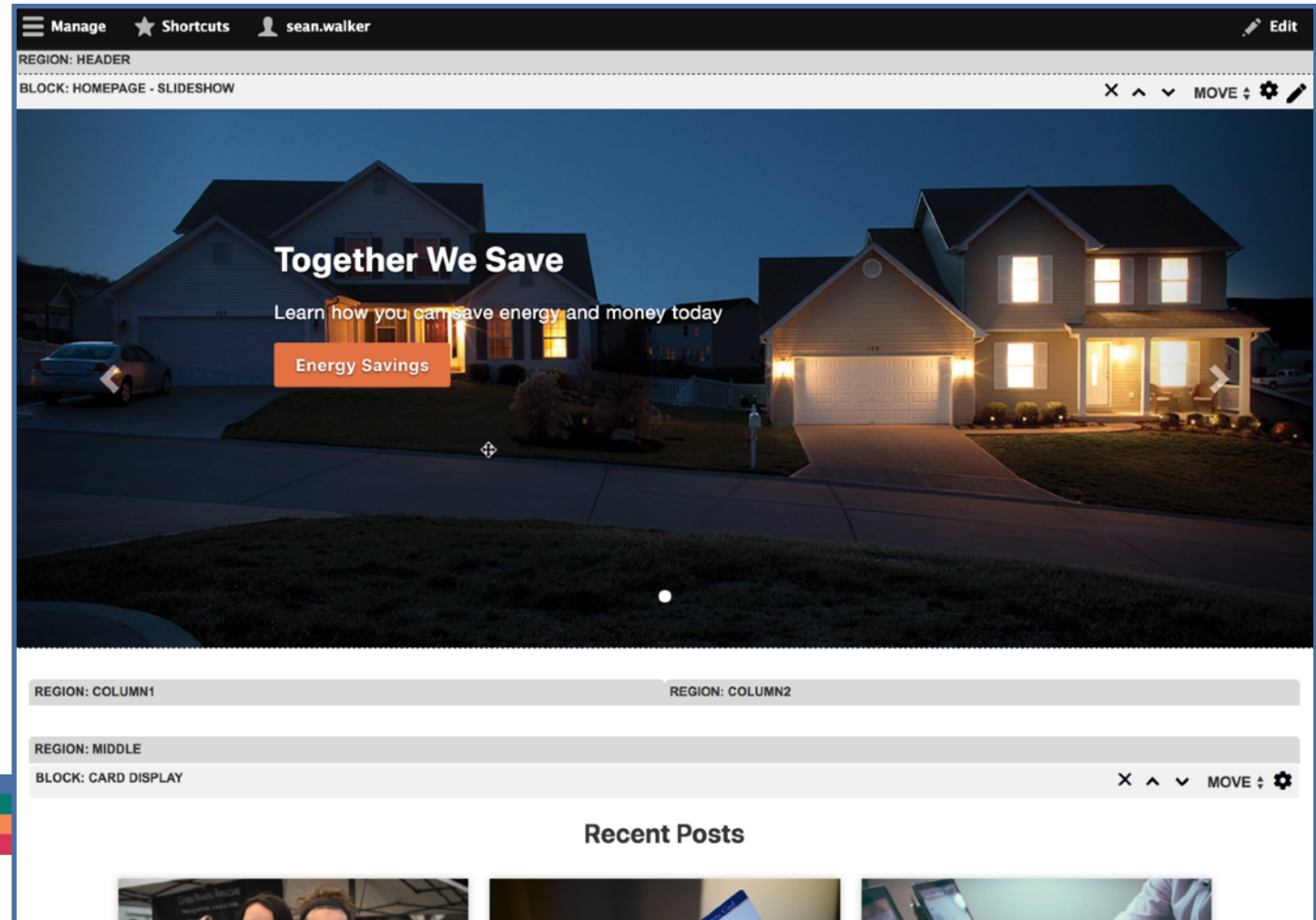
Co-op Web Builder 3
Homepage Design

Now we need to make sure we save our page layout changes.

Notice the Page Designer tools now is showing two additional buttons for **Save** and **Cancel**

Go ahead and click on **Save**

Co-op Web Builder 3
Homepage Design

You should now have a nice one slide slideshow on your homepage.
Feel free to start creating more components for your site next.
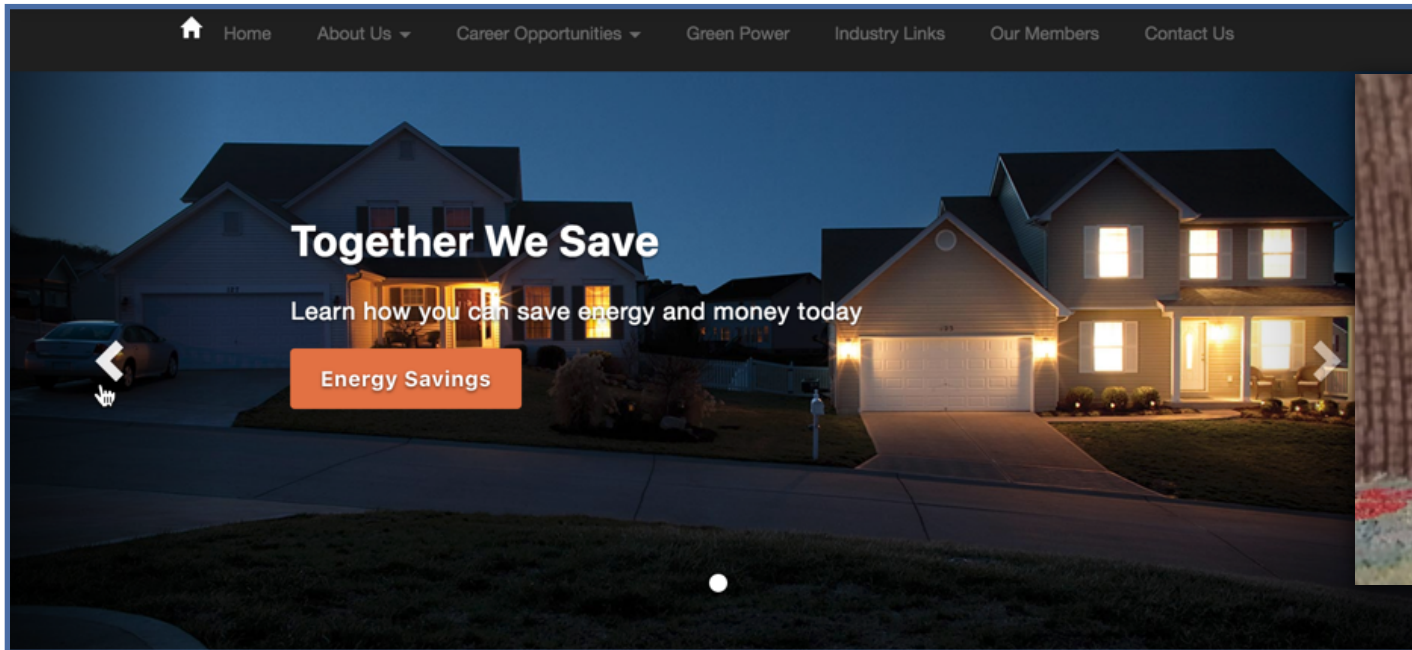
Co-op Web Builder 3
Page Designer Tools

All components are reusable. With the click of one button, you can insert any component (you already made) onto another page of your site. Now that's pretty neat!

Tip: You can always find your components under the **Manage Content (#1), Custom (#2)** area of the Page Designer.
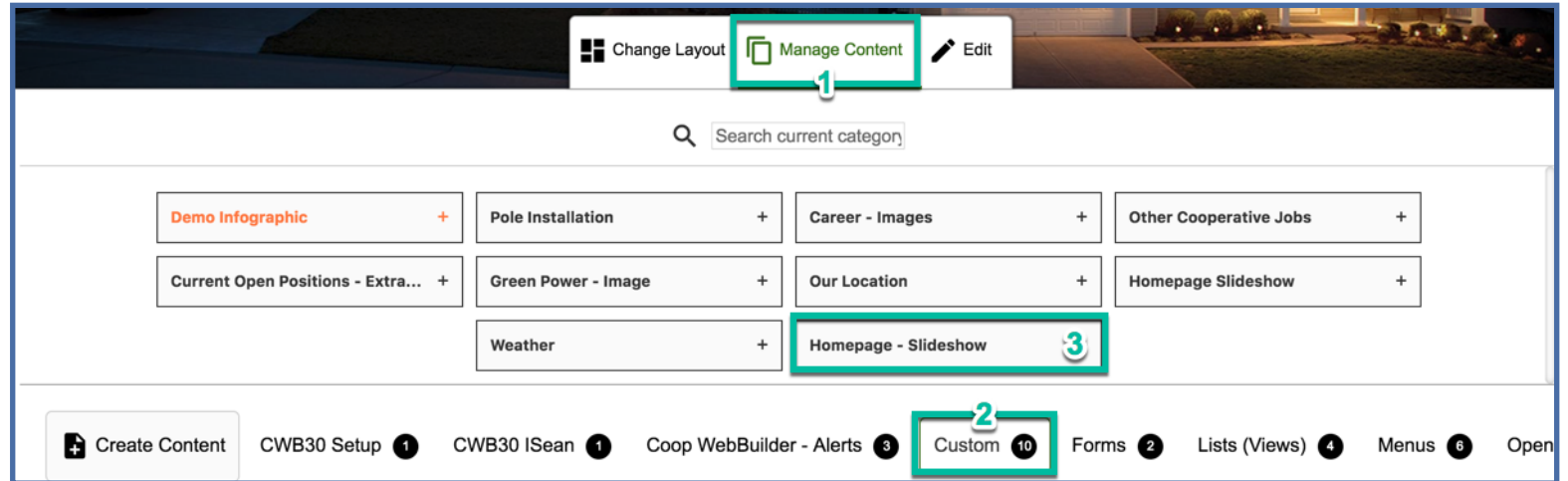
If you wanted to insert the same slideshow on another page of your site, all you would need to do is choose **Homepage - Slideshow** and then click confirm to place it on another page.

Co-op Web Builder 3
Page Designer Tools

Change Layout   Manage Content   ✏ Edit

At the bottom of your homepage (also present on any articles of your site), you will see the Page Designer Tools. These tools are your interactive design tools to add/edit/remove content from your pages at whim. They are new to CWB 3 and will allow you to do everything from create components, to change page layouts on the fly – all while looking at your page. This ends up being a much more organic approach to designing content and will empower you to create great things.

We already used it to create a slideshow, but what if we want to move that slideshow around or make it bigger/smaller?

Let's click the **Edit** button real quick and take a look at the editing interface.

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Co-op Web Builder 3
Page Layout

Whenever you click **Edit,** you unlock the page designer tools.

Every page on your site has a layout applied to it by default.

If you look at the different areas, you will see names of regions where you can place content.

For example, there is a **Header, Column 1, Column 2, Middle** region visible on our homepage.
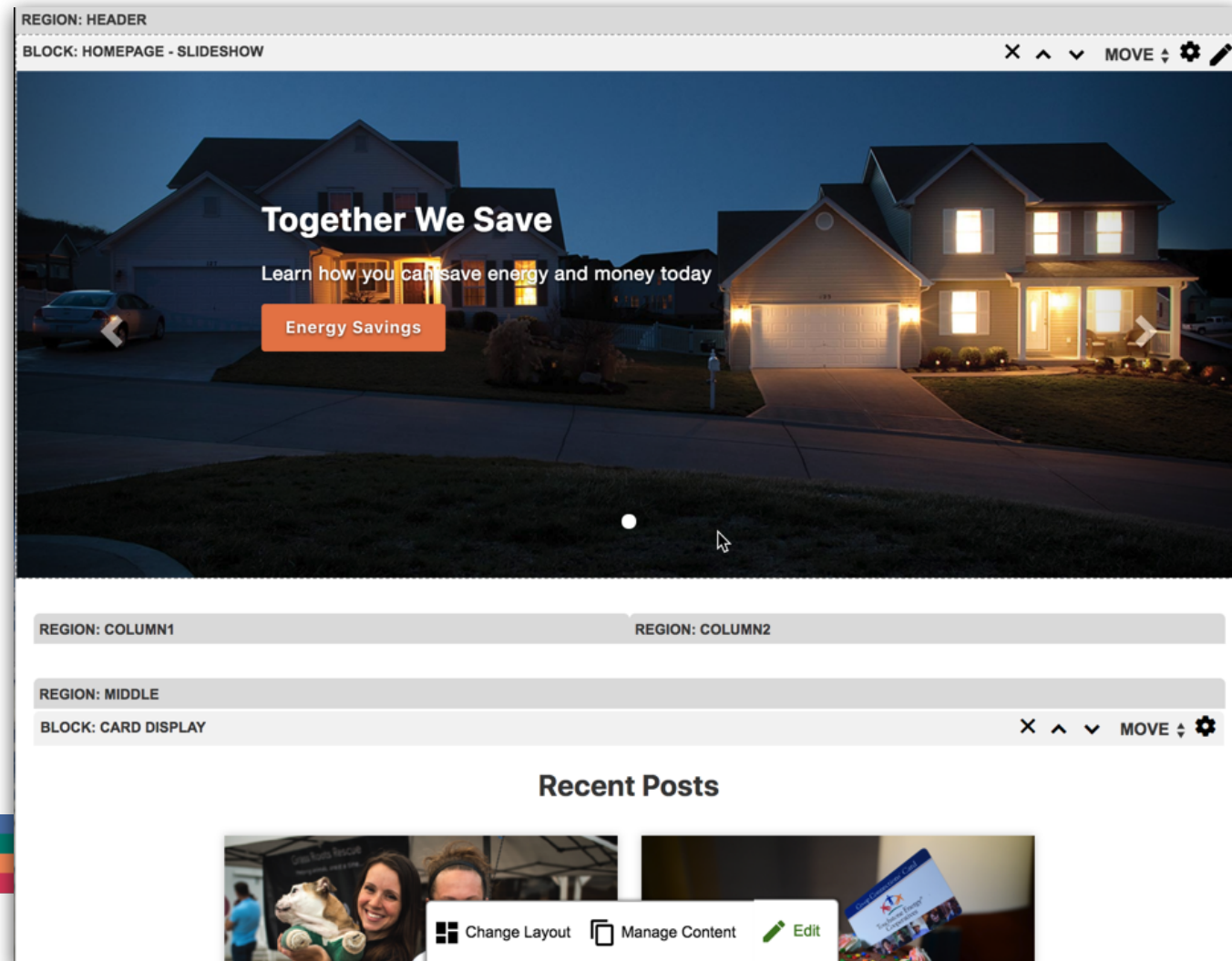
Co-op Web Builder 3
Page Layout

By default, in CWB 3, your homepage layout will use alternating 1x100%width and 2x50% width columns.

The power of components will allow you to simply click and drag any of your content into any region of a page layout and have it respond accordingly.

This is RESPONSIVE COMPONENT DESIGN and it's an amazing thing!

Tip: This is the power of the **Layouts**, and you can change them on the fly with the **Change Layout** button.
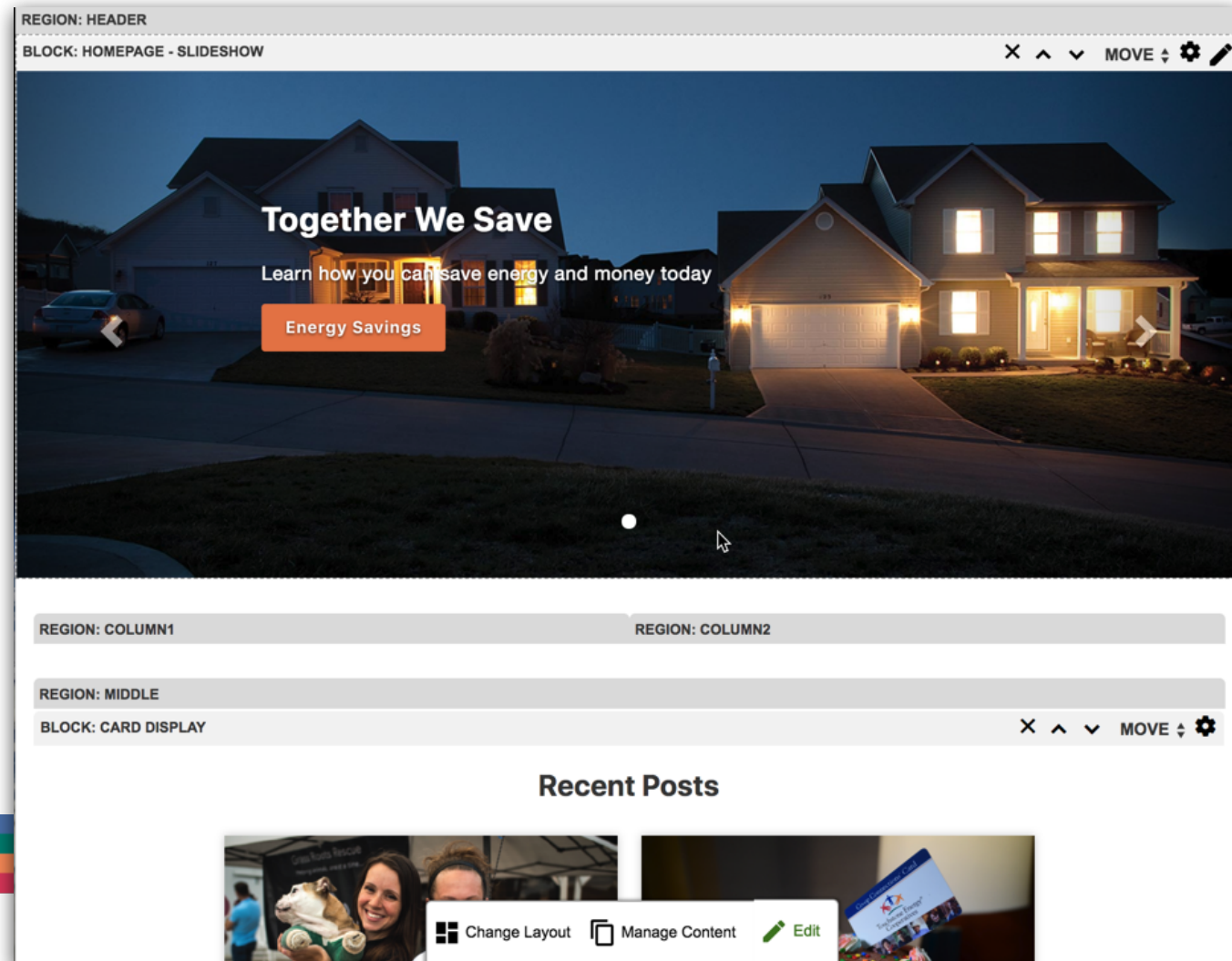
Co-op Web Builder 3
Page Layout Tools

Go ahead and try to drag your **Homepage-Slideshow** block down into **Column 1** and see what happens. You should find that the slideshow automatically responded to the space. Now, try moving it into the **Middle** region and save your page.
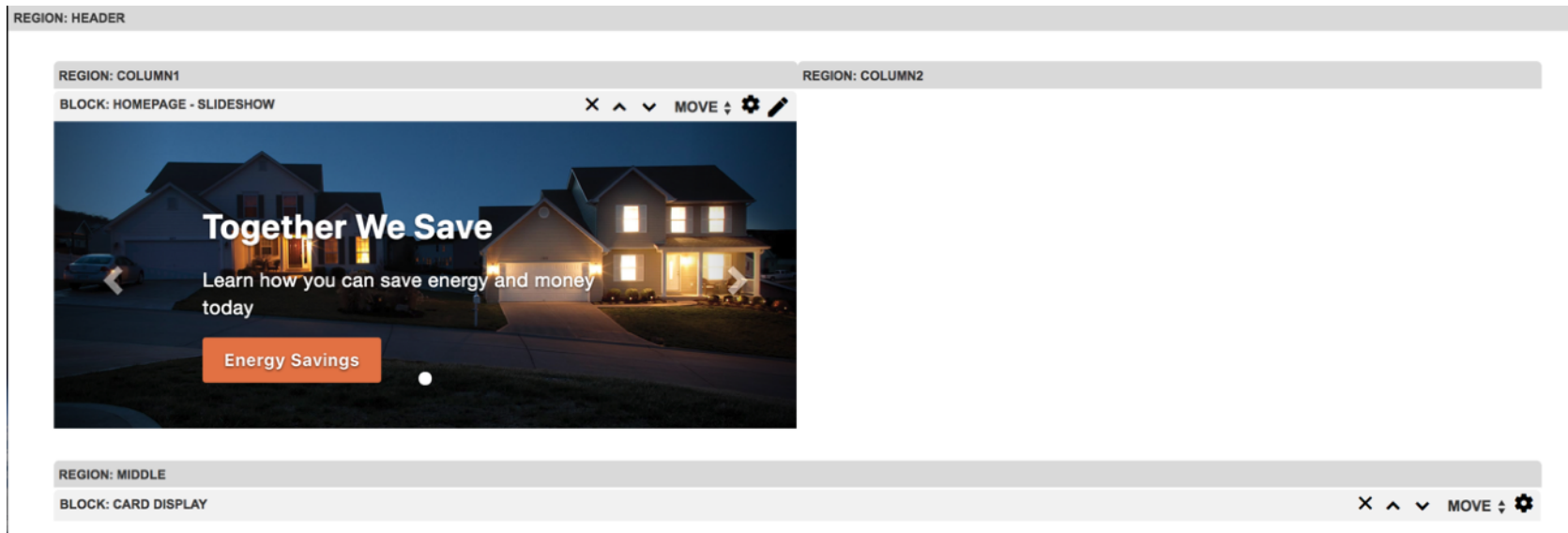
Co-op Web Builder 3
Page Layout Tools

The slideshow is now in the **Middle** region, which is a 100% width area. Notice this region doesn't act the same as the **Header** region on the homepage.

The **Header** region is stylized this way on purpose for the homepage to take up the true full width of the screen. This gives your homepage a special style that isn't reflected on your child pages — IE: so you can have a full-width slideshow.

Tip: This is an easy way to get some space around your slideshow, if you don't want it to be full-width, move it down into the **Middle** region instead.
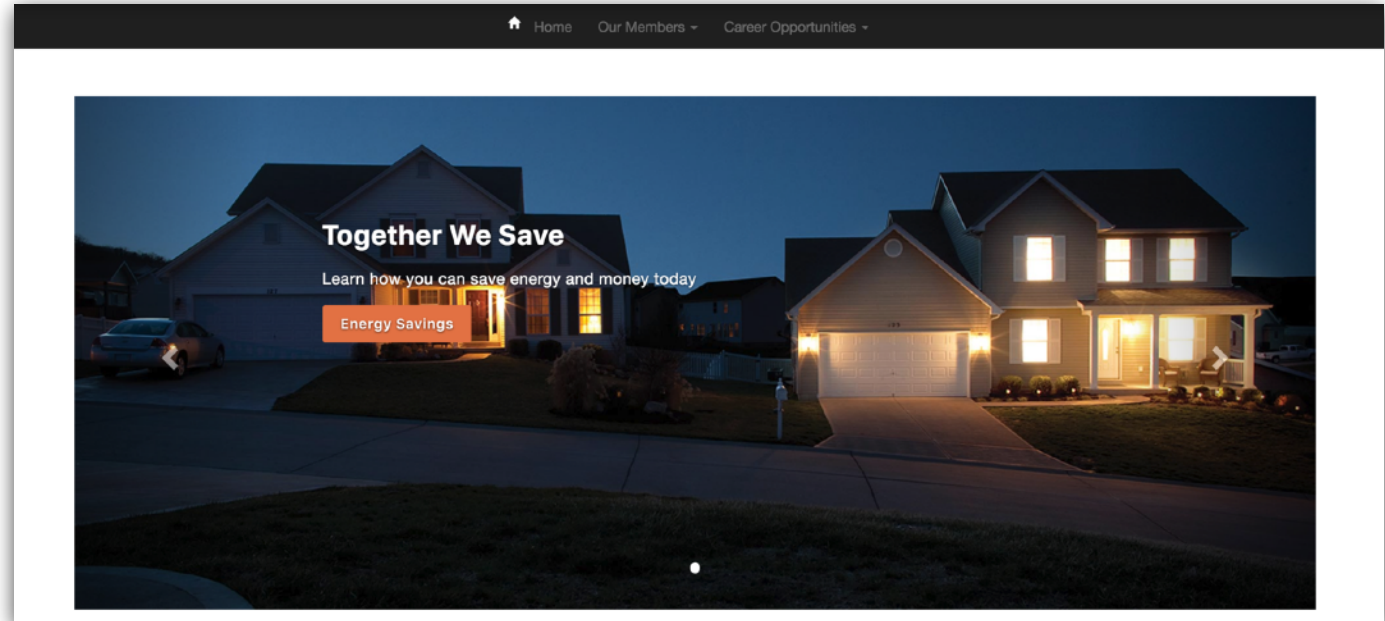
Co-op Web Builder 3
Page Layout Tools

Now, let's go ahead and click on **Change Layout** to see what it does.

This unlocked the Page Layout Tools and will allow you to change your page layout on a page by page basis.

Let's change the layout to something with 3 columns.
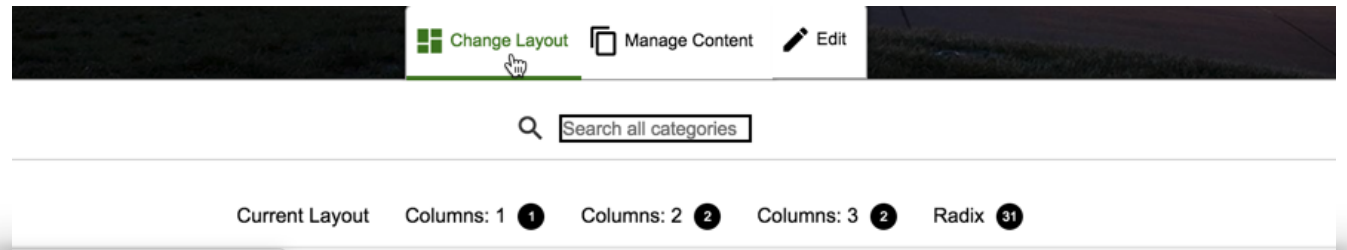
Co-op Web Builder 3
Page Layout Tools

Click on **Columns: 3** and then choose the **Three Column 25/50/25** option.

Tip: There are 35 page layouts in the system, feel free to change your page layout whenever you need to accommodate your design best.
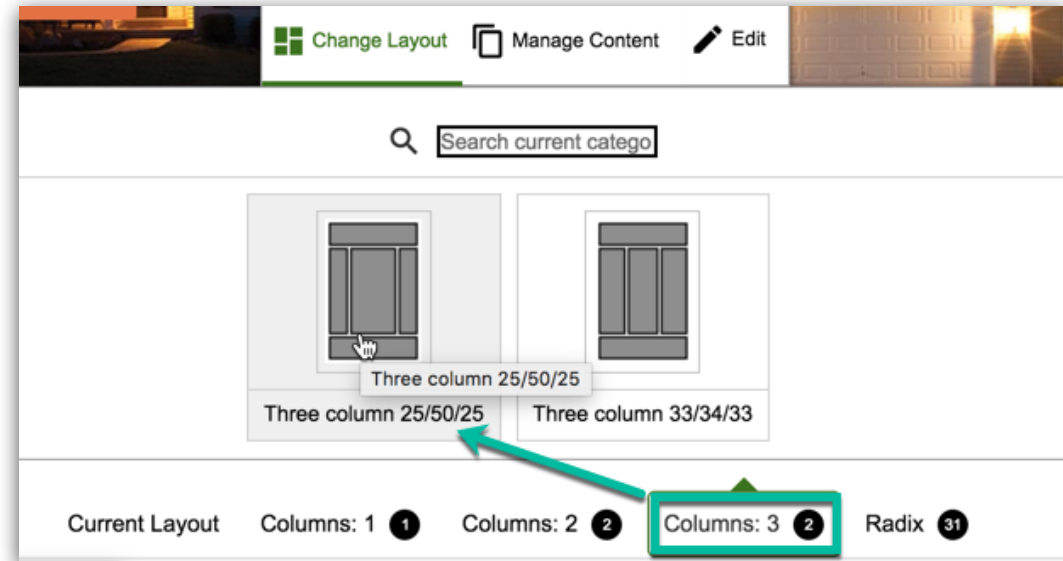
Co-op Web Builder 3
Page Layout Tools

Drag the homepage slideshow into the **Region: Second** area of the page layout and save your page.

Notice how the component responded to the layout automatically.

All components are responsive... automagically!
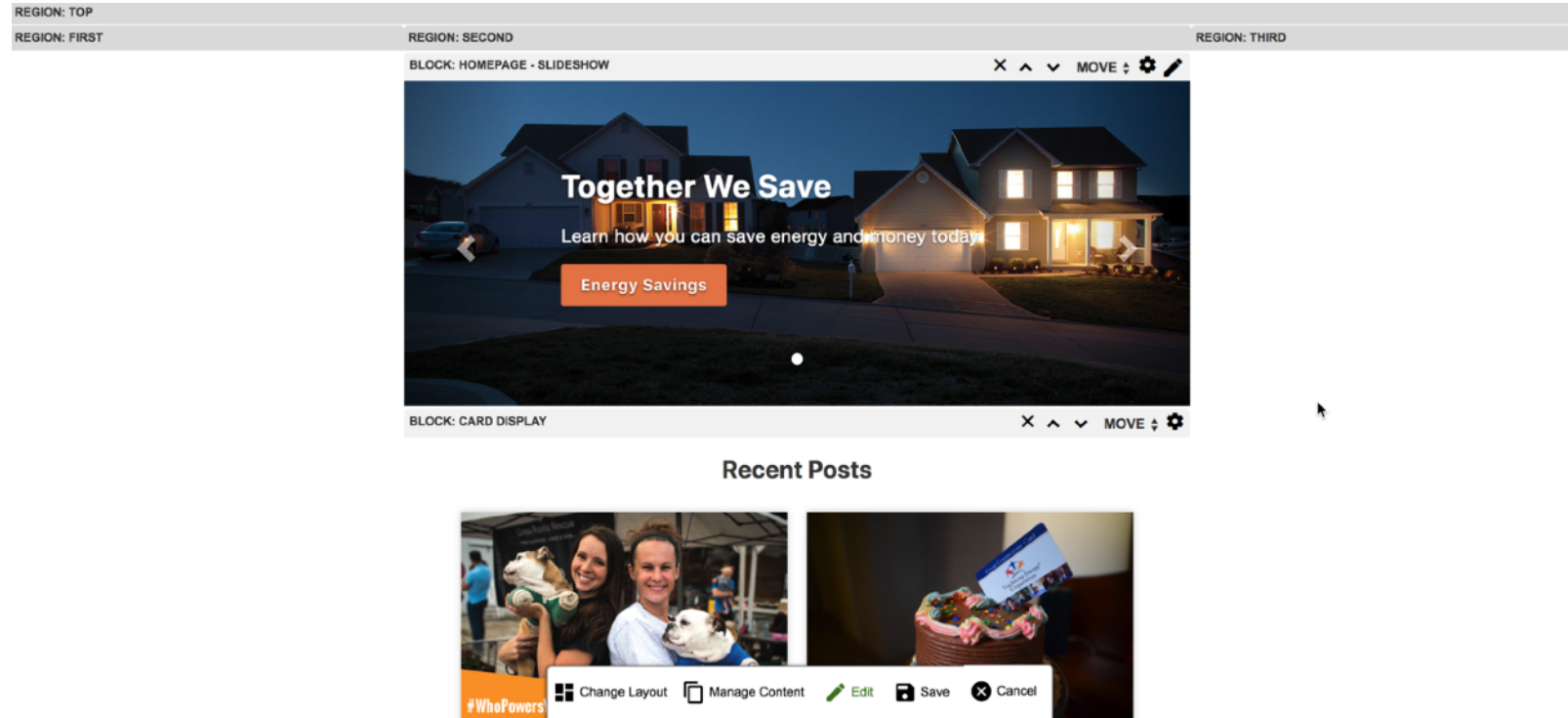
Co-op Web Builder 3
Page Layout Tools

So, what now?

Go ahead and try to create your homepage layout using the desired page layout option of your choosing.

Then you can create components (like slideshows, infographics, full width paragraph, quotes, etc.) and pop them into various areas of your layout.

Easy as pie!
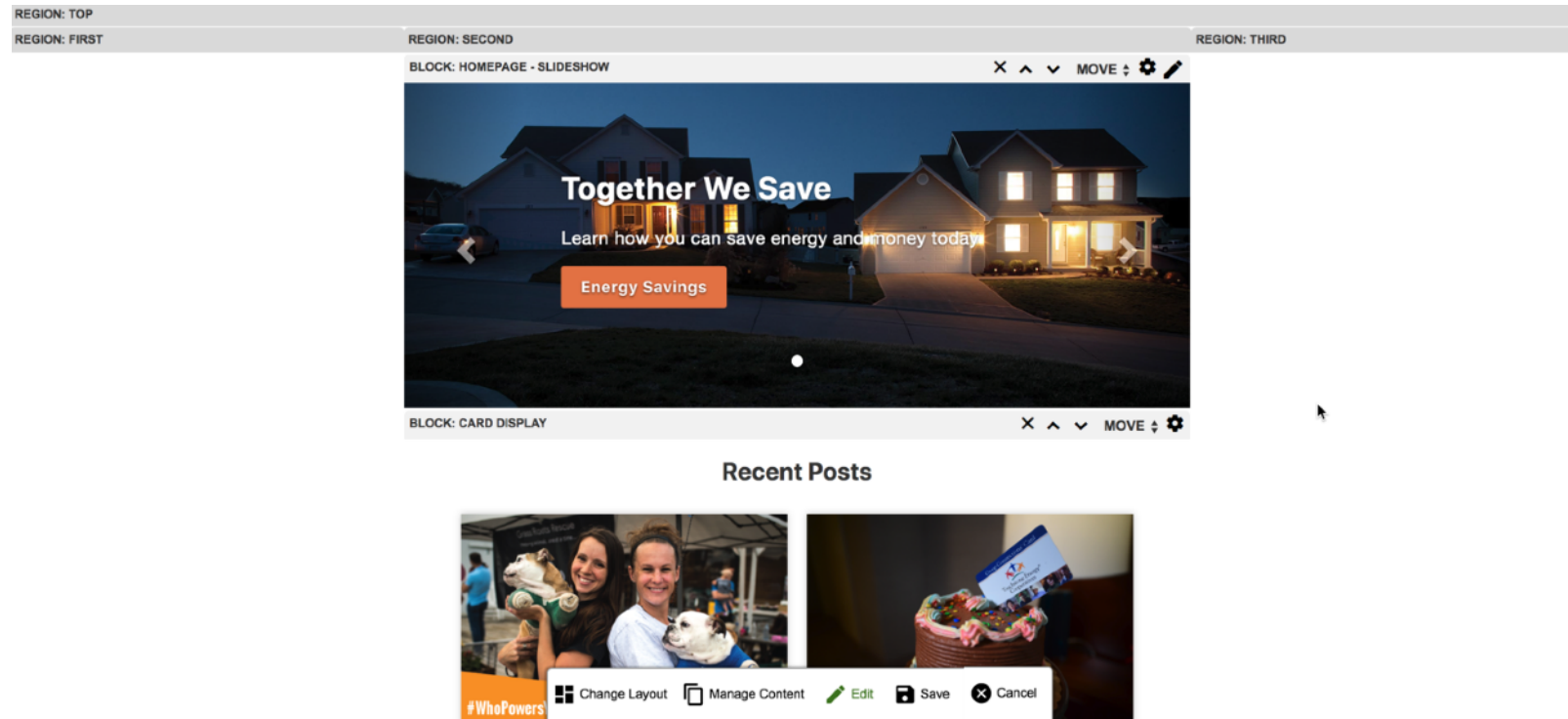
Co-op Web Builder 3
Page Layout Tools

Having trouble thinking of what do to next?

Navigate to your **Example Homepage Layout** (/example-homepage-layout) page. This page comes preinstalled on your site for easy reference any time you need.

You may be wondering how this was achieved…so let's take a look.

Tip: If you deleted or moved this page from your main menu, check your **Content** area of your site to see if it still exists.

Co-op Web Builder 3
Page Layout Tools

The active layout is 1 column, so each component is full-width automatically, because they respond to the layout — remember?

This page was created by stacking 4 different components on top of each other.

1) Hero Image w/ Button
2) Quote
3) Infographic
4) Full Width Paragraph

Now, choose a layout that you think will suit your homepage best and start making some components. See what you can come up with!

Tip: Get more coffee

Co-op Web Builder 3
Webforms
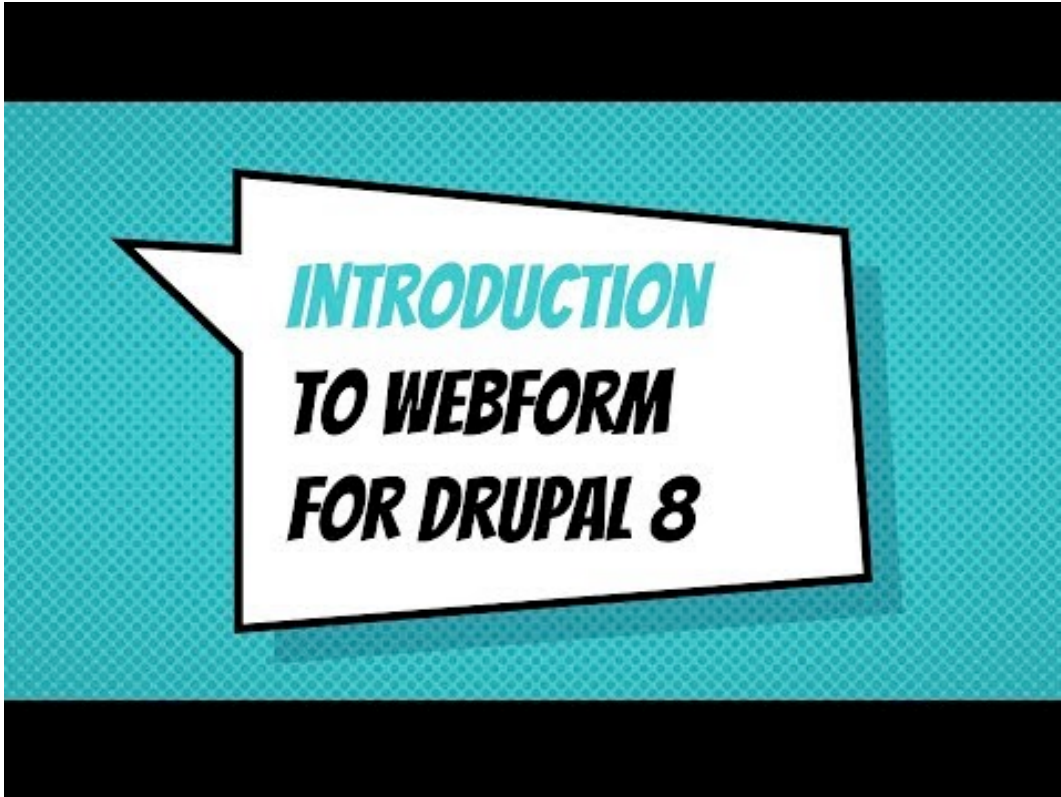
You have learned so much so far. The ability to create articles, add them to menus, create components and master page layouts. What's next then?

You probably have some forms you would like to build, so let's look at the webform builder next so you can say goodbye to all those icky PDF files.

INTRODUCTION TO WEBFORM FOR DRUPAL 8

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Co-op Web Builder 3
Webforms

The webform builder in CWB 3 is the most robust ever. It's one of the best features in the platform. Let's take a look at how you can get started using it now.

Click on "Structure" and choose "Webforms" to visit the webform overview page.
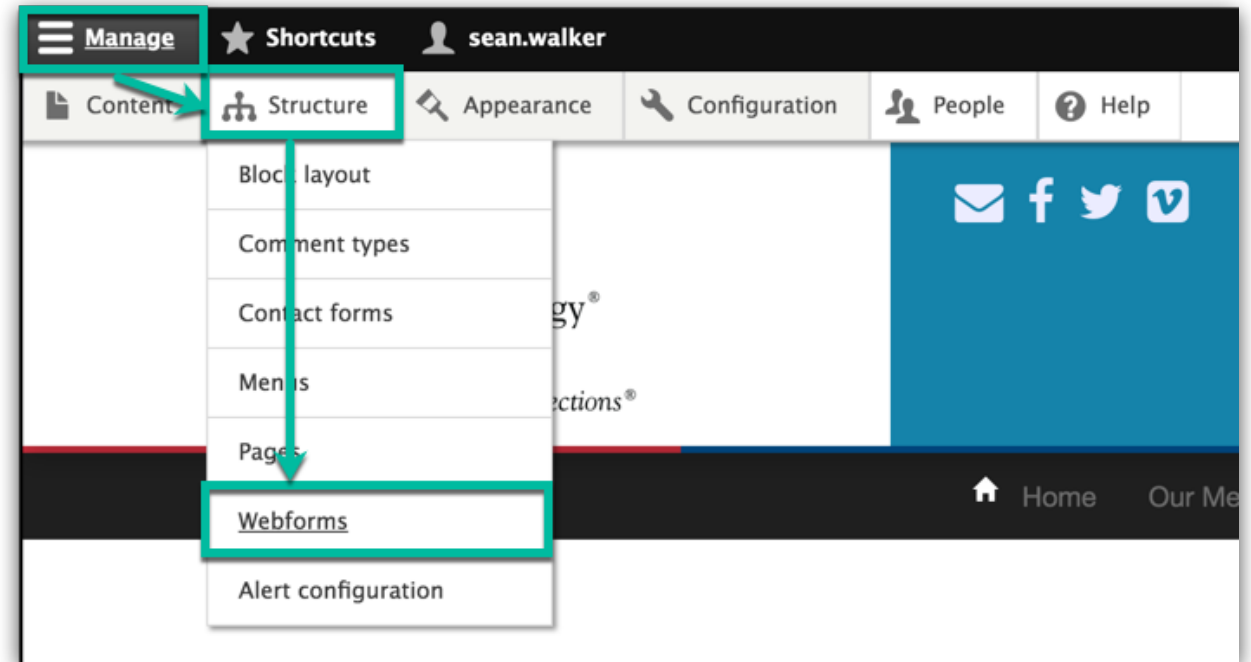
Tip: Click on **Manage** to expand the secondary admin toolbar (if you don't see it already).
Best Practice: Make a shortcut once you are on the Webforms page, you will be here a lot.

Co-op Web Builder 3
Webforms

Welcome to the **Webforms** overview page. There is a lot you can do here, but let's focus on what is front and center.

Each site comes with a default **Contact** us webform. We should take a look at it's settings to ensure it is setup the way we want.

Notice the **Templates** and **Submissions** tabs, which we will dive into bit later.

Best Practice: See the golden star by **Webforms?** That means that I created a shortcut!
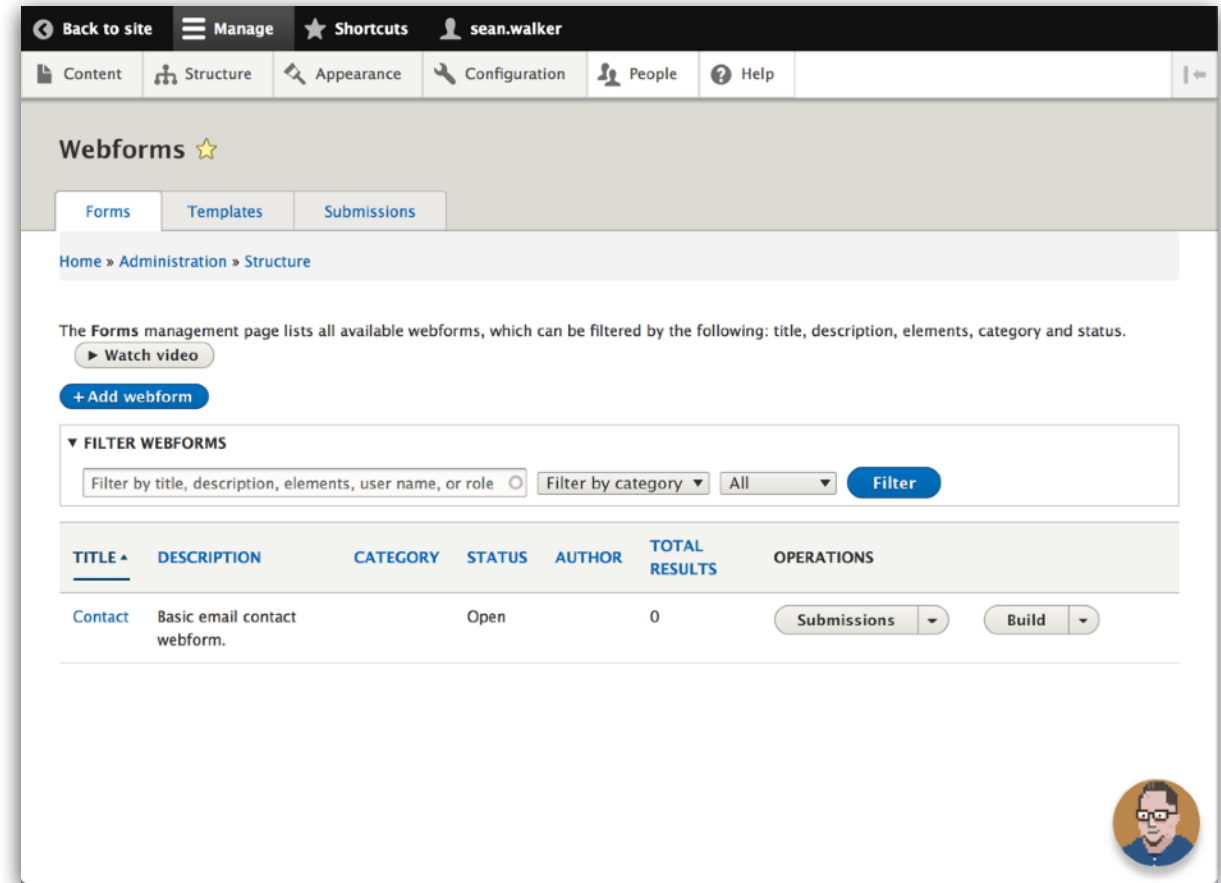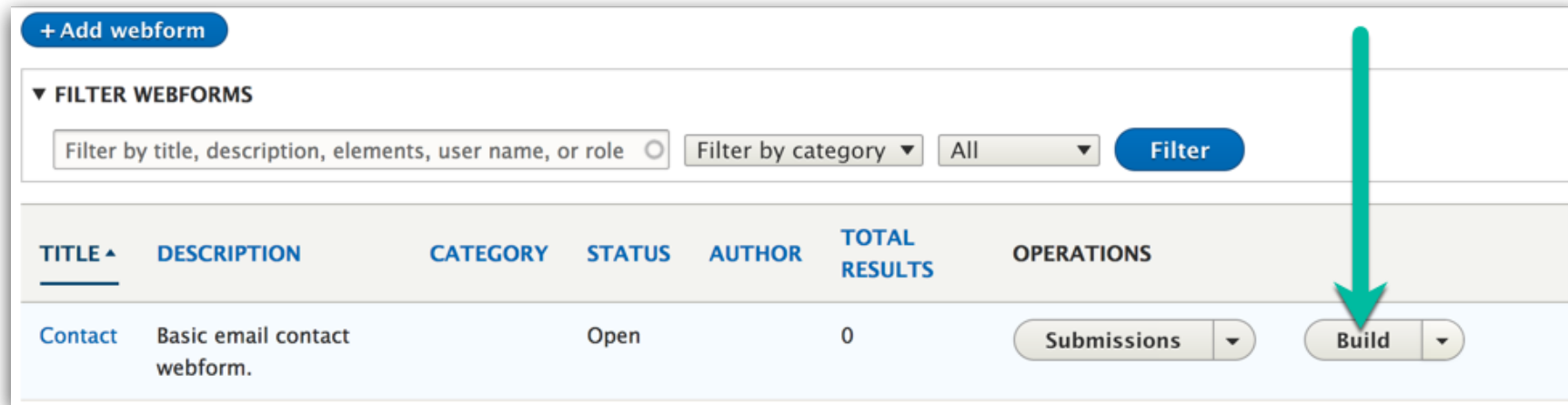
Co-op Web Builder 3
Webforms

See the blue **+ Add webform** button? This is what you can click whenever you want to create a new webform.

Let's click on the **Build** button to take a closer look at the **Contact** form and add a new element to it.

Co-op Web Builder 3
Webforms

Build mode will let you edit a webform's fields. You can add additional elements, edit existing elements and also flat out delete elements right here.

Whenever you are creating the form itself, you will want to be in **Build** mode.

Tip: Note that the webform plugin has "**Watch video**" buttons on almost every settings page. Watch them, they are very short and helpful!

Co-op Web Builder 3
Webforms

Before we start working on the webform, take a look at how the form presents itself out of the box.

The form looks just fine, but a container to help organize the information would be very handy.

Let's add a presentation element to the form as our first task.

Your Name *

Your Email *

Subject *

Message *

Send message

Co-op Web Builder 3
Webforms

Let's add a quick presentation element to the Contact form, so it will look a bit prettier and be more print friendly.

Presentation elements are GREAT to organize your webform data. It's a good idea to use several on the same form if it is long enough. Good examples are things like "Your Information", "Your Past Work Experience", or really anything that will have several form fields inside of it.

Click on the big blue **+ Add element** button when you are ready.

Note: The **+Add page** button is for creating multi-step webforms. If your form is going to have several pages, this might be a good idea to use.

Co-op Web Builder 3
Webforms

Notice that the types of elements are broken out into different categories. You can also collapse categories until you find what you need. Collapse the categories until you see the **Containers** option.

Next, click on **Add element** for a **Details** type.

The **Details** element is considered a container element and is mostly used for presentation purposes. In this case, we are using to pretty up the form and use it as a container for the other fields. It will also make a nice container for the form values when you received them via e-mail, so you can print submissions with a more organized format.
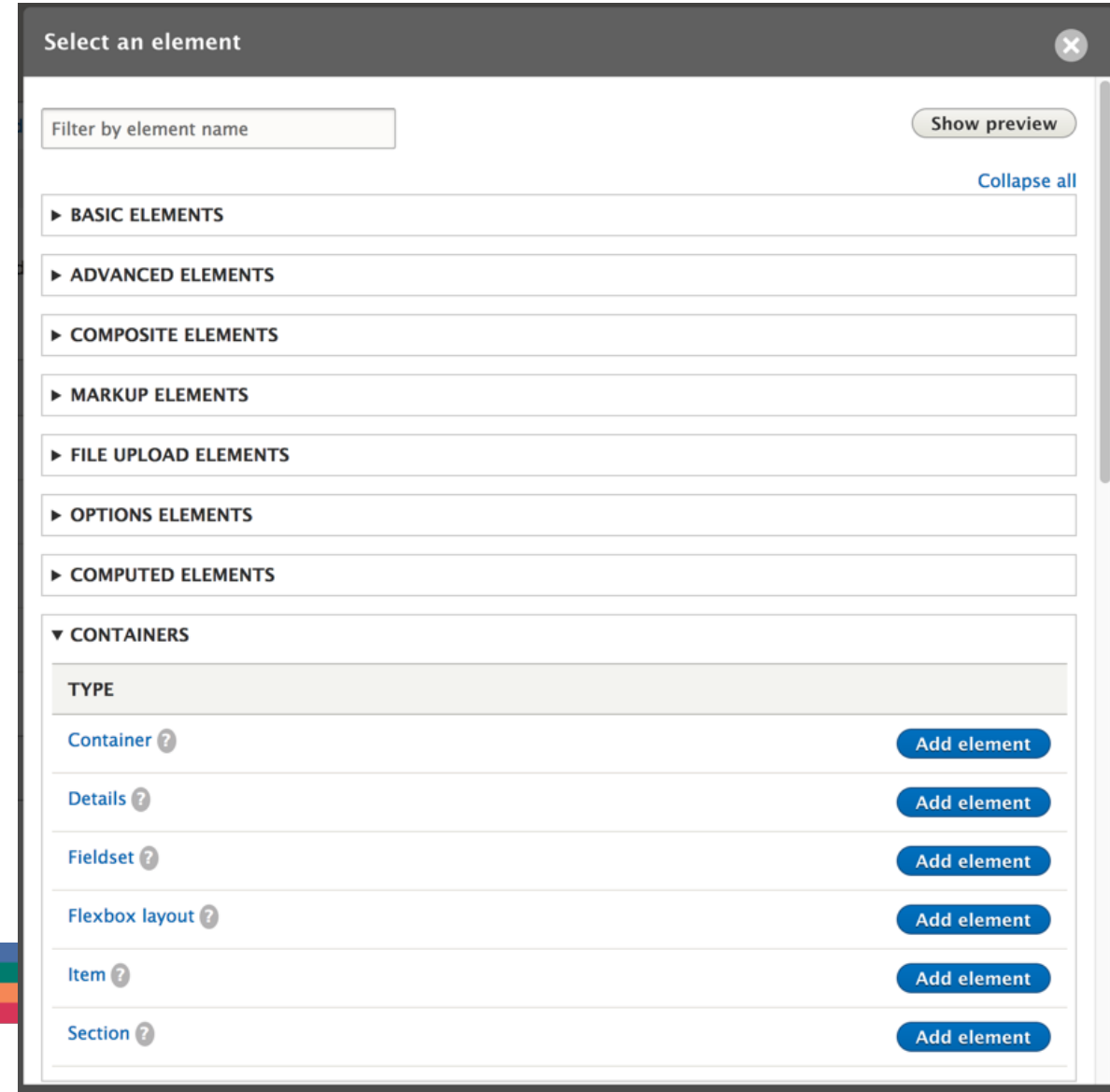
Co-op Web Builder 3
Webforms

Go ahead and **Title** the details element. Type something that you won't mind being visible to your site visitors.

Expand the options for **Form Display** and check the box for **Open**.

Finally, click the blue **Save** button in the bottom-left corner of the pop-up window.

Co-op Web Builder 3
Webforms

You now have a new **Details** element in your webform, rejoice! You will first want to grab the **+ (crosshair)** icon and pull the new element to the top of your form field list.

You can reorder the elements in your webforms by simply dragging and dropping their order with the **+(crosshair)** icon any time you like.

TITLE		KEY	TYPE	REQUIRED	OPERATIONS	
✛ Send us a Message*	+ Add element	send_us_a_messag e	Details	☐	Edit	▾
✛ Your Name		name	Text field	☑	Edit	▾
✛ Your Email		email	Email	☑	Edit	▾
✛ Subject		subject	Text field	☑	Edit	▾
✛ Message		message	Textarea	☑	Edit	▾
✛ Submit button(s)		actions	Submit button(s)		Edit	▾

Save elements   Reset

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Co-op Web Builder 3
Webforms

Next, use the **+ (cross-hair)** icon to indent each of the 4 remaining elements. These 4 elements are now children of the **Details** element we created previously. Doing this makes sure they are part of the container called **Send us a Message**.

Click the blue **Save elements** button in the bottom left, so we make sure to save our changes before we check out the webform.

Co-op Web Builder 3
Webforms

Take a quick glance at the **Type** column on this page. This will tell you the type of webform element that has been created. You can easily see front and center that this form is built with a combination of the **Details, Text field, Email, Text field,** and **Textarea** elements.

Co-op Web Builder 3
Webforms

Notice that you are currently on the **Build** tab. You can quickly switch back to viewing the webform by clicking on the **View** tab.

For extra credit, try adding some additional elements to your Contact form. Perhaps a **Number** element for "Account Number" may be a nice addition here. Feel free to add as many additional elements as you like.

Finally, go ahead and click on **View**, so we can see what our new webform looks like with the **Details** element in-place.

Co-op Web Builder 3
Webforms

You will notice your webform now has a very nice stylized container around all of the form elements.

This looks **WAY** better now, it will also print much more friendlier when you go to print your e-mails you receive from the website.

Note: The active field highlights in blue for accessibility purposes.

Co-op Web Builder 3
Webforms

A really neat addition to webforms is the **Composite Elements** list of choices.

These are often used areas in forms that will compile many fields together to save you time.

Try adding the **Address** field to your Contact Us form now.

Co-op Web Builder 3
Webforms

The address element is made up of many other elements, which will end up saving you a lot of time!

You can just configure the options here and you will have fields for (Address, Address 2, City, State, Zip, Country) by just adding one element to your form.

Tip: Try the "Contact" composite element some time, it has pretty much everything you would need for a contact form all inside one element!

Co-op Web Builder 3
Webforms

Now, we have our form built exactly how we wanted. Great!

Let's make sure it is configured to be sent to the right individuals and that the confirmation page experience is solidified as well.

Click on the **Settings** tab now.

Co-op Web Builder 3
Webforms

When you arrive on the **Settings** page, you will see a slew of options. Let's just focus on clicking on the **Confirmation** link for now.

This will let us choose a confirmation type for the webform. This is the behavior that will happen when the form is submitted.

The default is usually URL with message, but you can change this setting to anything else you prefer.

Tip: A popular selection is Inline, which keeps the user on the current page and displays a custom message after the form is submitted.
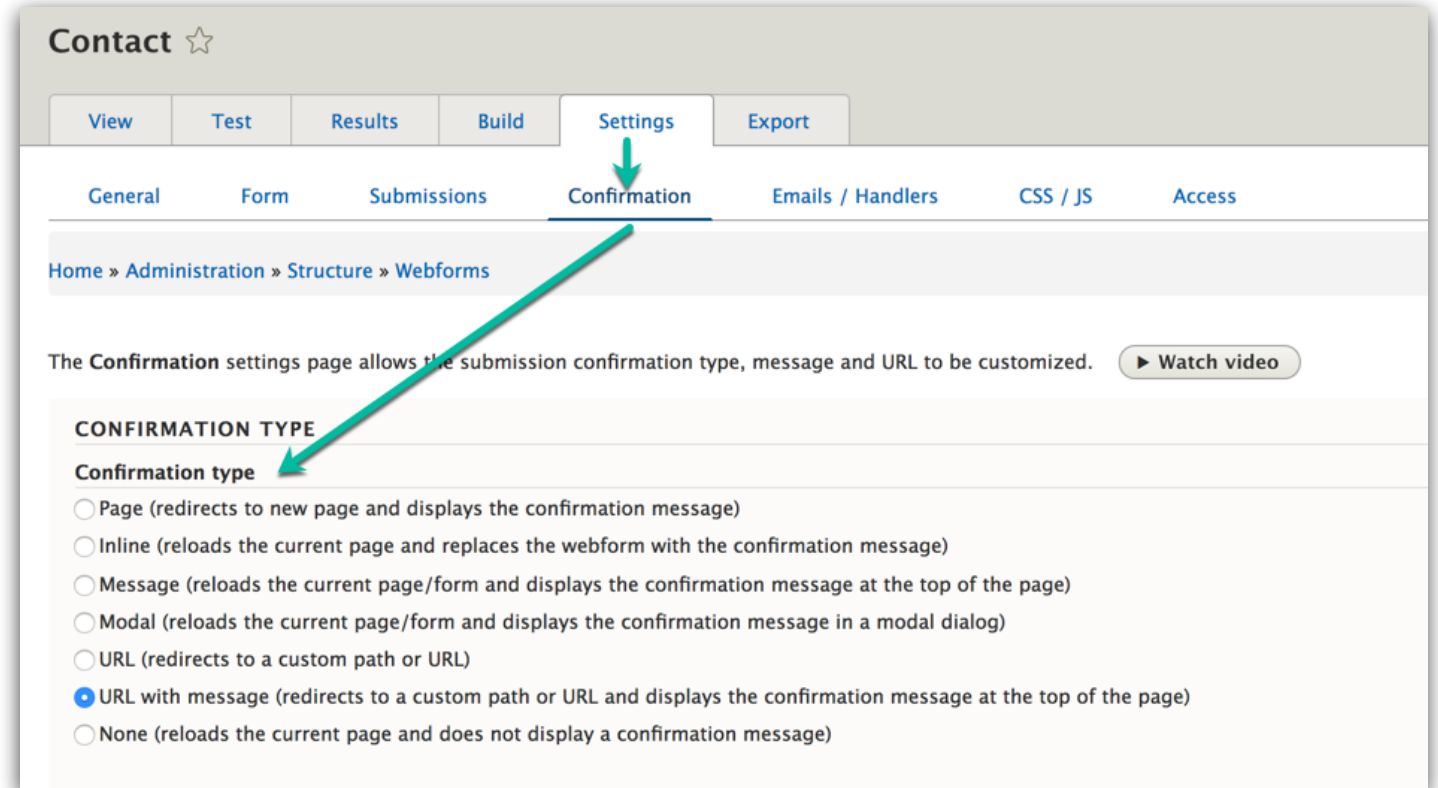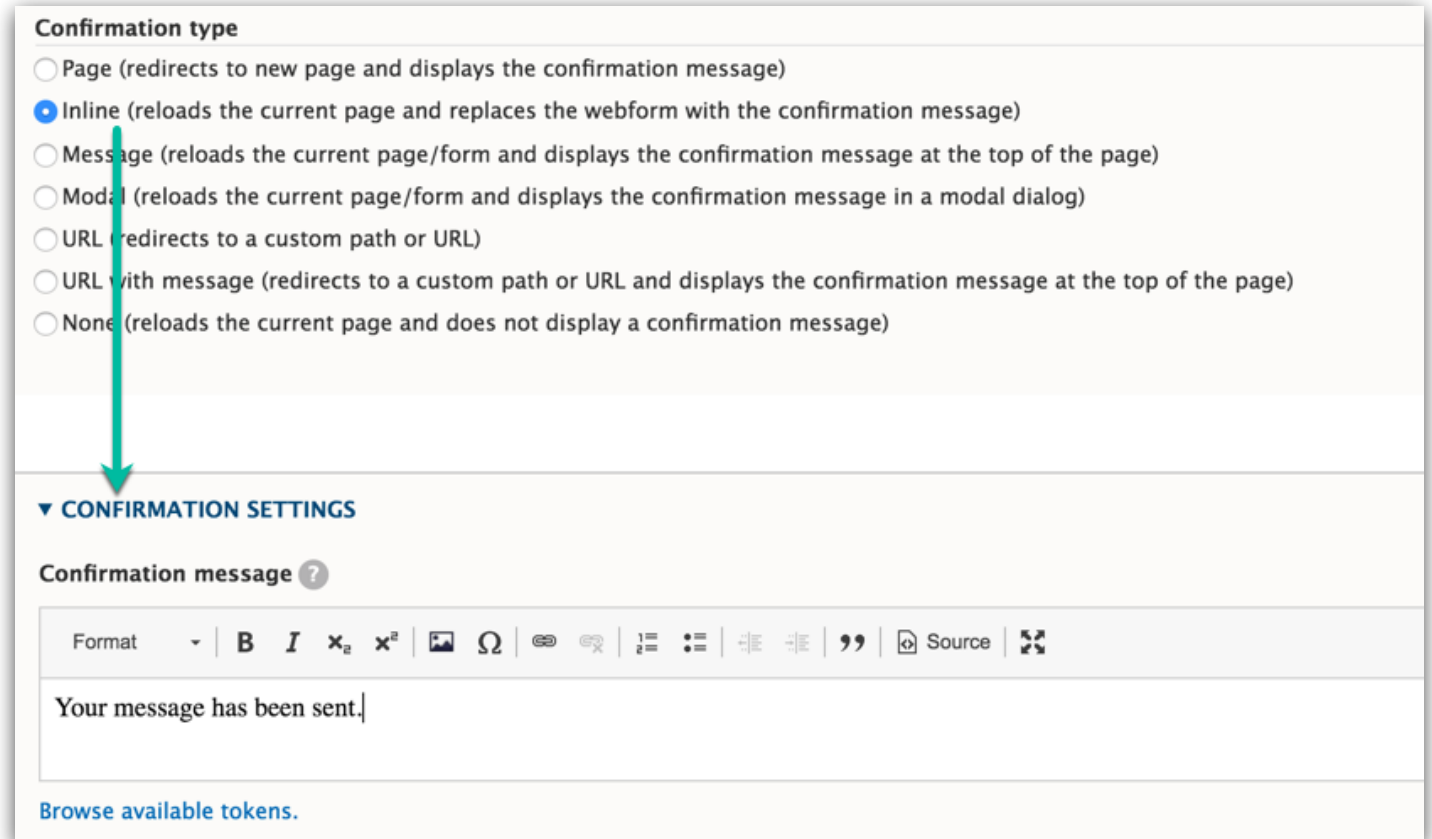
Co-op Web Builder 3
Webforms

Select your preferred **Confirmation type** and then scroll down a little bit to find the settings.

For the **Inline** type, I can use the page editor here to insert images, add links to text or just simply type a text message to the user.

Tip: Creative freedom is often limitless!

Co-op Web Builder 3
Webforms

Now that we have our confirmation all setup and groovy, let's make sure the submissions are going to the right contact at our co-op.

We are going to use the nifty webform navigation tabs to get to the next area.

Click on the **Emails/Handlers** link now.

Co-op Web Builder 3
Webforms

This settings page will let you setup a workflow for your webform.

You can specific who can receive confirmations in pretty fine detail.

Note: The contact webform comes with two handlers, **Email confirmation** and also **Email notification**.

Co-op Web Builder 3
Webforms

The **Email confirmation**, is sent to the user after the fill out the form. You may not want this (and that is totally cool), so use the **Edit** drop-down to the right to delete this e-mail handler. You user will receive no notification after submitting the form now.

That will leave you with the **Email notification** handler only. This is currently setup to e-mail your site-wide contact e-mail address. If you are unsure what that e-mail address is, you can set this value manually by clicking the **Edit** link.

Co-op Web Builder 3
Webforms

Click on the **To email** list of options and select **Custom**.

You can now enter any e-mail address you prefer. Notice there are also settings for CC: and BCC: if you choose to use them.
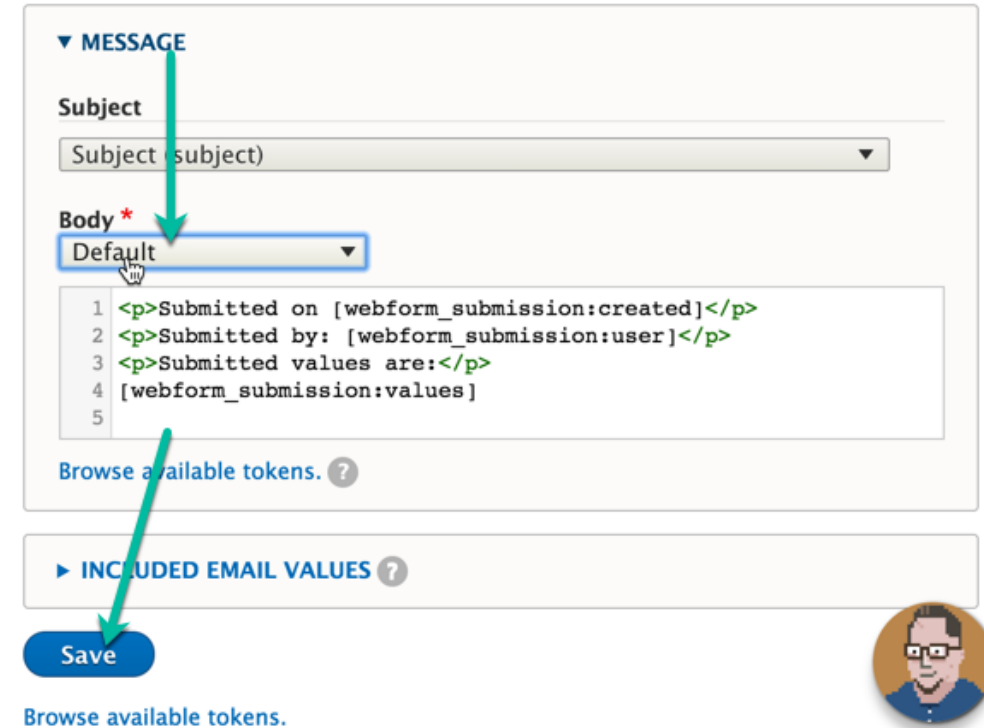
Co-op Web Builder 3
Webforms

Next, scroll down to the **Message** area and set the **Body** to Default. This will make it so all values from the webform get sent to you in the e-mail.

Finally, click the blue **Save** button.

Your webform should be pretty solid now, nice work!
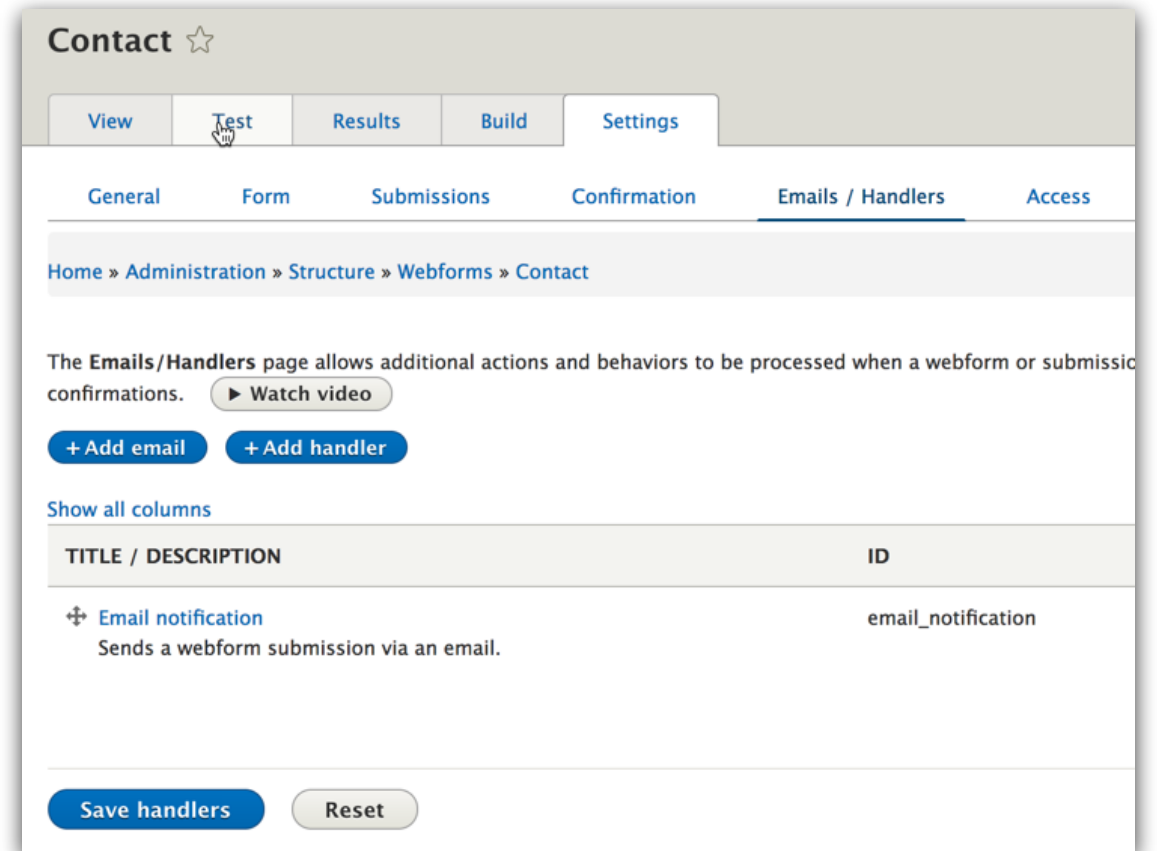
Co-op Web Builder 3
Webforms

Let's test this bad boy out to make sure it works exactly as planned.

Now that we are back on the Settings page, click on the **Test** tab.

Co-op Web Builder 3
Webforms

See that warning symbol in the upper left? These are the system messages and they are always super helpful. I can read the message and see that my entire form has been populated with test data, which is awesome. Image if this was a 6 page form you built and you had to fill in all those fields just to test it? That would stink!

Co-op Web Builder 3
Webforms

Go ahead and scroll to the bottom and submit the form with the test data by clicking on the **Send Message** button. Next, make sure your confirmation page settings happen exactly as you expect.
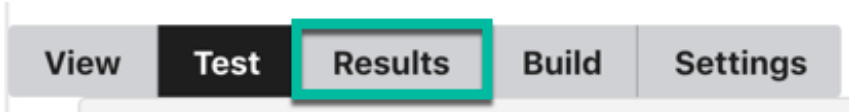
Co-op Web Builder 3
Webforms

After submitting the test form, go back to the **Results** tab. If you lost your place just now, remember you can always get back to your webform by visiting **Structure/Webforms** in your administrative toolbar.

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Co-op Web Builder 3
Webforms

The **Results** area is super neat! You can download entire Excel spreadsheets of all your webform submissions or just view them in a nice table on the website. In the screenshot below, you should be able to see your test submission data and it will be the #1 submission for your Contact Us form.

Notice the star symbol by the #1 submission, you can star submissions and also write notes in them directly on the submissions view. This can be handy or CSR/MSR to leave notes for others about submission data.

Bonus: Feel free to delete your webform test submission if you like.

Submissions	Download	Clear

Home » Administration » Structure » Webforms » Contact

The **Submissions** page displays a customizable overview of a webform's submissions. Submissions can be reviewed, updated, flagged and/or annotated. ▶ Watch video

▼ FILTER SUBMISSIONS

Filter by submitted data and/or notes | All [1] ▾ | **Filter**

≣ Customize

1 submission

#	★🔒📄 CREATED	SUBMITTED TO	USER	LANGUAGE	IP ADDRESS	YOUR NAME	YOUR EMAIL	ACCOUNT #:	SUBJECT	MESSAGE	OPERATIONS
1	☆🔒📄 Tue, 10/23/2018 – 15:43		sean.walker	English	10.0.12.23	Loremipsum	random@random.com	Dixisset	Testing contact webform from Mr Migration Test	Please ignore this email.	Edit ▾

Co-op Web Builder 3
Webforms

Remember I said we would come back to the **Templates** option? Go ahead and click on the link now.

The system comes with some pre-built templates, which could potentially make your life easier.

Go ahead and preview some of the templates and see if any can save you some time.
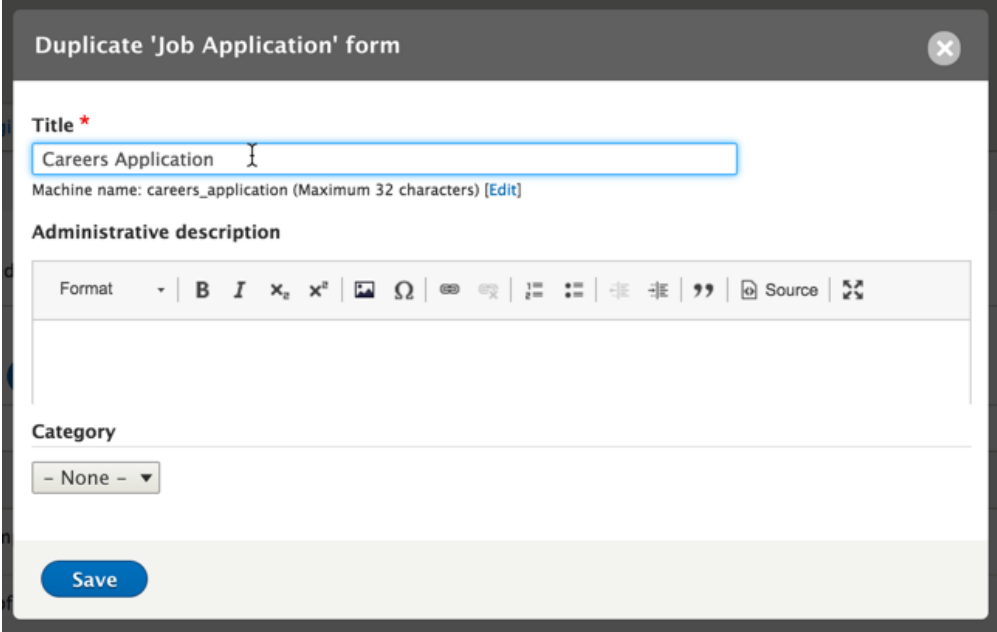
Co-op Web Builder 3
Webforms

If you preview a template you like, you can **Select** it.

That will bring you to a screen where you can title the new webform and save it.

This will make a new form on your site that will have all the fields from the template already populated, so you can then just change them as you see fit.
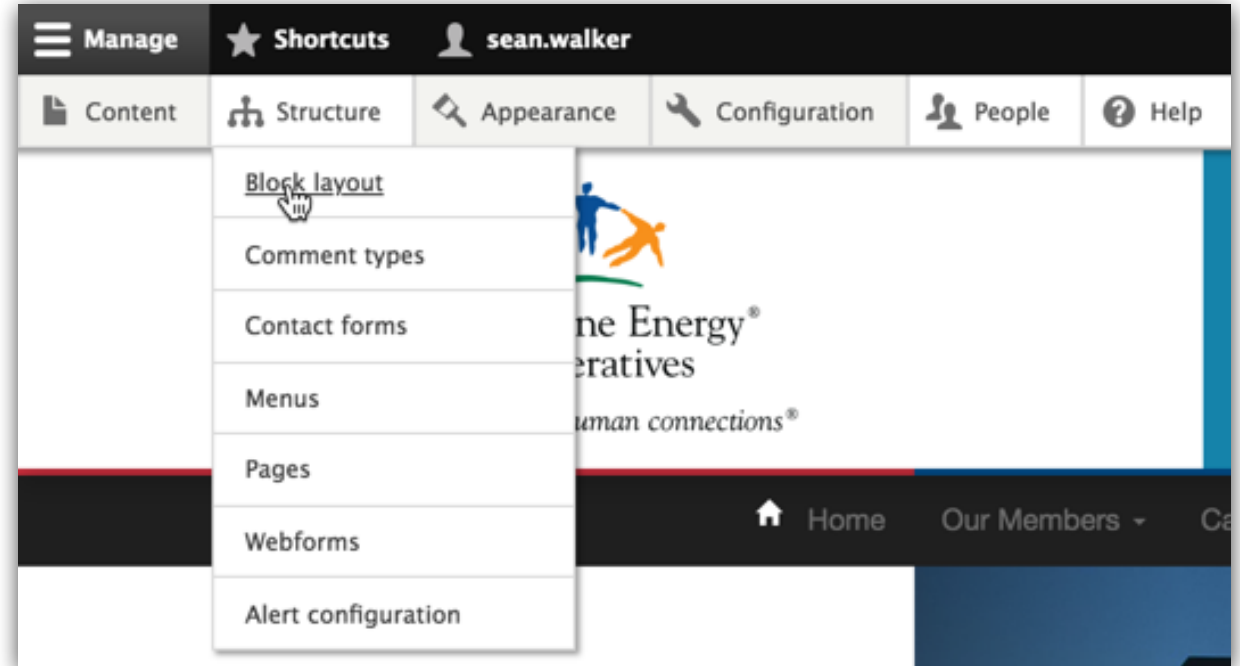
Co-op Web Builder 3
Block Layout

Whoo! That's enough on Webforms for now.

Let's go back to design, the fun part of website creation, right?

I want to make sure you are aware of the **Block Layout** page, as it is very handy resource for customizing your site design.

Go to your administrative toolbar and click on **Structure** and choose **Block Layout.**

Co-op Web Builder 3
Block Layout

Before we look the entire screen, let's quickly digest what we are looking at.

1) **Block Layout** – the tab for the screen we are on now.
2) **Custom block library** – a tab that lists all your components, everything custom you create lives here.
3) **CWBModernized** – this is the name of the theme you are using and should be selected by default.

Tip: You should never have to adjust the Block layout for anything but the CWBModernized theme, the rest are system themes and should not be modified.

Block layout ☆

1 Block layout   2 Custom block library

3 CWBModernized   Seven   Bootstrap   CWB Login Theme
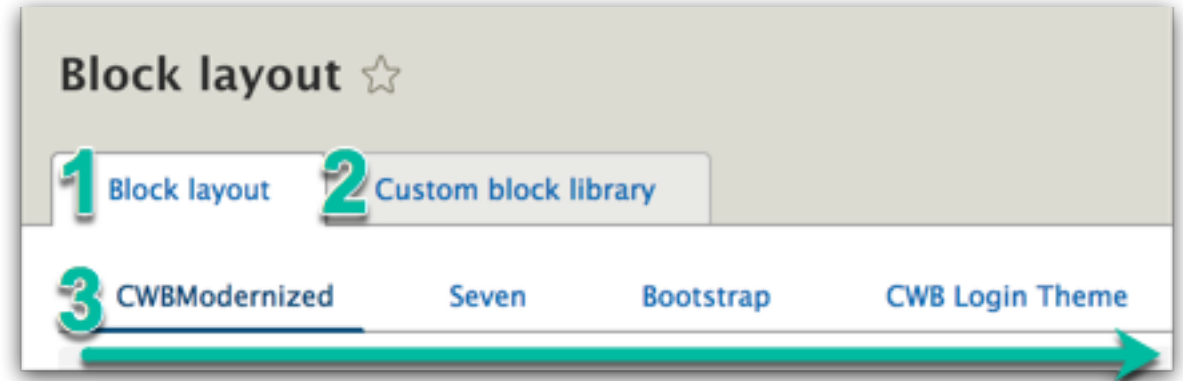
Block Layout

#1 | Block = Shows all content that is present in your current theme's layout.

#2 | Category = Shows the type of content that is present in your theme's layout.

#3 | Region = Shows which region of your theme is showcasing this content.

#4 | Operations = Let's you configure, disable or remove any content from your theme's layout.
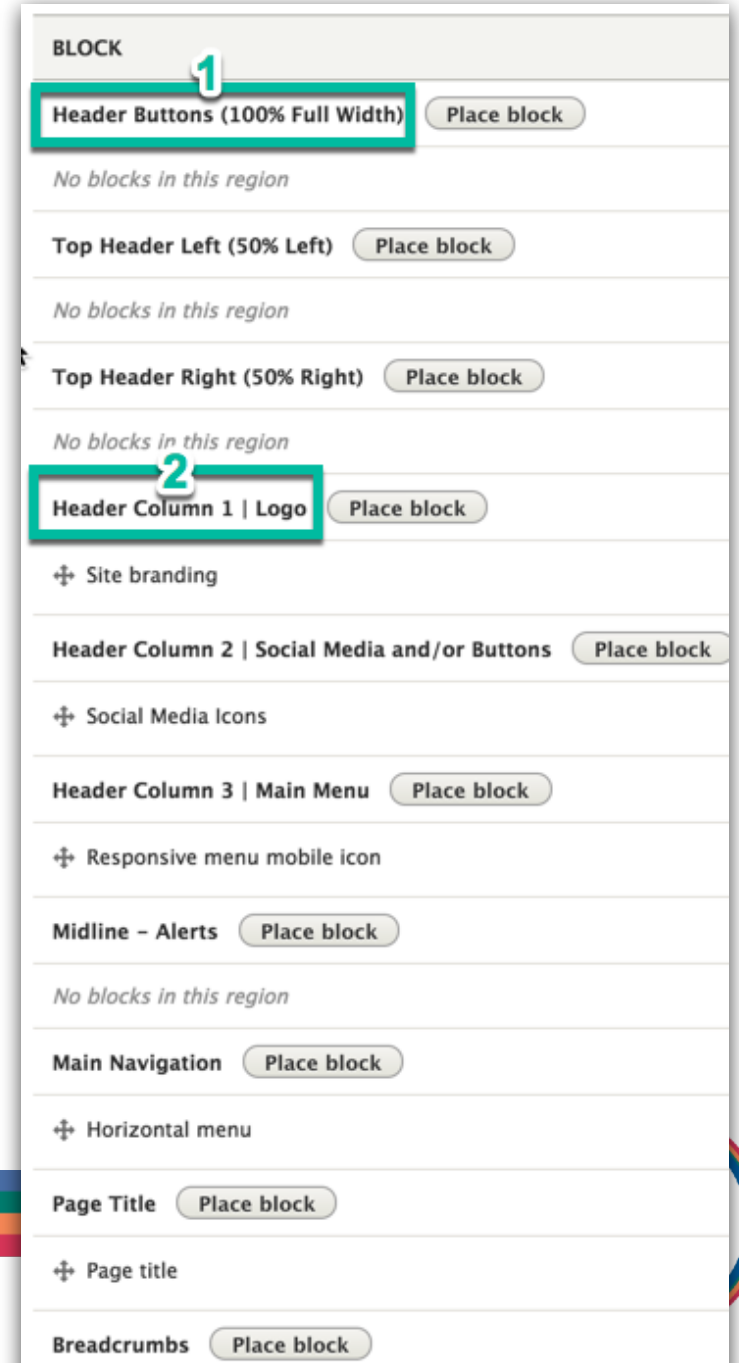
Block Layout

The left column showcases your theme's layout and structure by telling you the names of available **Regions** that you can place content.

In **(#1)** we can see there is a region called **Header Buttons**. This region is listed first because it is the first area in your theme that you can potentially place content. Notice that it says ***No blocks in this region***, which means you simply aren't using it right now.

Notice the **Place block** button, which will let you place any component you create directly into any region of your theme.

In (#2) we can see there is a region called **Header Column 1 | Logo**, and it is not empty! There is a block inside of it called **Site branding**, which is your logo. This is how your logo shows up in the left header of your website.

All content in your theme can be customized on the block layout page!

Block Layout

Let's use the **Block Layout** to insert a site search feature.

In the **Top Header Left (50% Left)**, click on the **Place block** button.

BLOCK	CATEGORY	REGION
Header Buttons (100% Full Width) [Place block]		
No blocks in this region		
Top Header Left (50% Left) [Place block]		
No blocks in this region		
Top Header Right (50% Right) [Place block]		
No blocks in this region		

Block Layout

In the **Place block** screen, take a look at the **Block** column and also the **Category** column. You are basically looking at all possible content on your site that could be inserted into your theme.
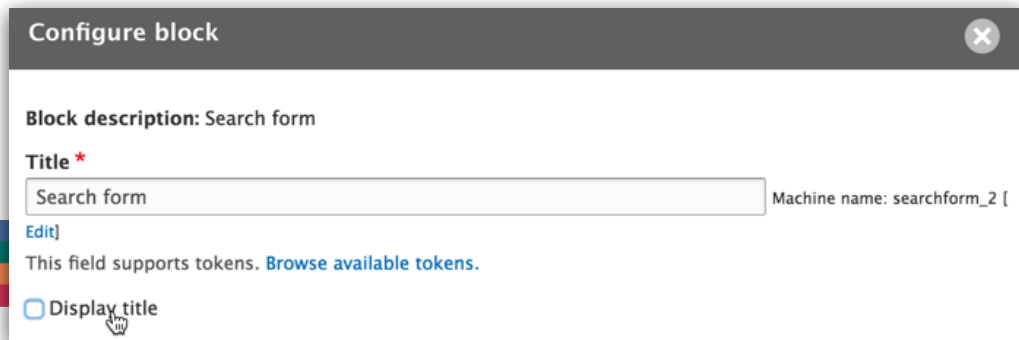
Scroll down until you find the **Forms** category.

Click on **Place block** for the **Search form**.

Search form	Forms	Place block

Uncheck **Display title** and then place the block by clicking on the big blue **Save block** button.
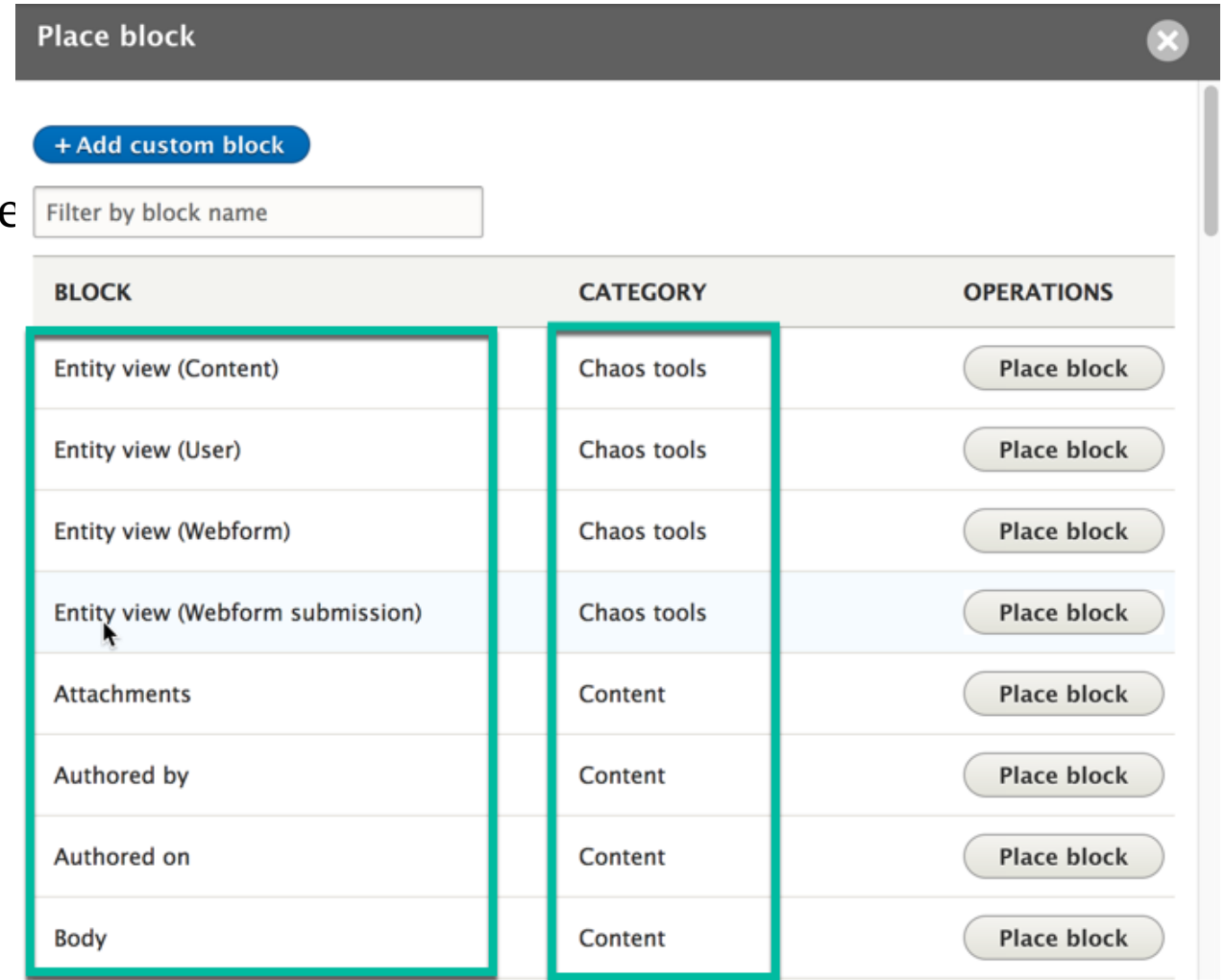
Configure block ⊗

Block description: Search form

Title *

Search form | Machine name: searchform_2 [

Edit]

This field supports tokens. Browse available tokens.

☐ Display title

Place block ⊗

+ Add custom block

Filter by block name

BLOCK	CATEGORY	OPERATIONS
Entity view (Content)	Chaos tools	Place block
Entity view (User)	Chaos tools	Place block
Entity view (Webform)	Chaos tools	Place block
Entity view (Webform submission)	Chaos tools	Place block
Attachments	Content	Place block
Authored by	Content	Place block
Authored on	Content	Place block
Body	Content	Place block

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Block Layout

The system will tell you that the block configuration has been saved. You can also see now that there is a **Search form** block in your **Top Header Left** region of your theme.

Let us navigate back to our homepage to check out the new addition to our site!
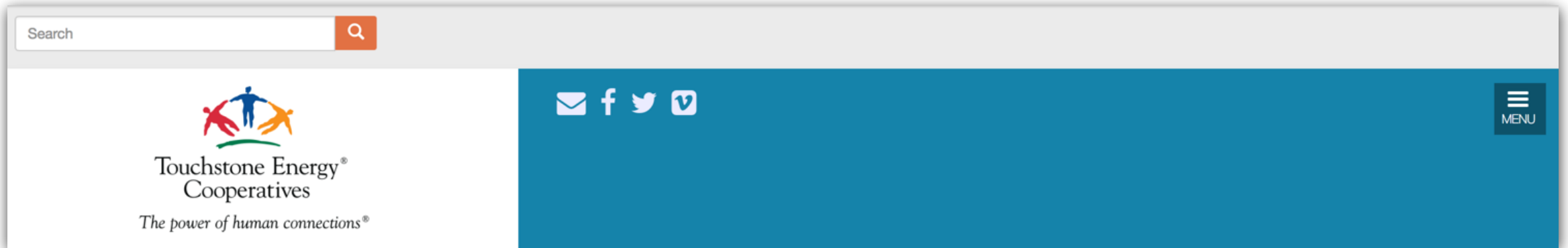
Block Layout

Awesome! We now have a search feature above our header. Isn't that neat?

Please feel encouraged to visit the **Block Layout** page further to insert content into areas of your site that you may or may not be using yet. There might be areas like the **Top Header Left** that simply just aren't currently showing any content.

On that note, let's take a look at how we can add some nicely stylized buttons into our theme layout next. Go back to the Block Layout screen (and add a shortcut if you haven't yet).

Block Layout

Click on the **Place block** button for the **Top Header Right (50% Right)** region.

BLOCK	CATEGORY	REGION	OPERATIONS
Header Buttons (100% Full Width) Place block			
No blocks in this region			
Top Header Left (50% Left) Place block			
✛ Search form	Forms	Top Header Left (50% Left) ▾	Configure ▾
Top Header Right (50% Right) Place block			
No blocks in this region			

Next, click on the blue **+ Add custom block** button, which should be the first option you see.

Place block ⊗

+ Add custom block

Filter by block name

BLOCK	CATEGORY	OPERATIONS
Entity view (Content)	Chaos tools	Place block
Entity view (User)	Chaos tools	Place block

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Block Layout

You will now be prompted to choose from a list of components to add to your site. This is essentially the same list of components that you saw when we created the homepage slideshow.

Let's choose the **CWB Button**, so we can create a button set for the top right header next.

Enter a helpful description into the **Block description**, so you could easily spot this content later. I'm going to use **Header Buttons** for the description.

Add *CWB Button* custom block ☆

Home » Add custom block

Block description *
Header Buttons
A brief description of your block.

Add custom block ☆

Home

⊙ **Accordion**
Create a collapsible accordion

⊙ **Basic block**
A basic block contains a title and a body.

⊙ **Column**
Group content inside of padded columns. Use this instead of a table to organize content in layout areas.

⊙ **CWB Button**
Create a button with an icon and link. Often used in the header for report outage and pay bill links.

⊙ **CWB Pay Portal Embed**
Use this block to embed your pay portal on your site.

⊙ **Pop-up**
Create a modal pop-up window with additional content.

⊙ **Slideshow**
Create a slideshow of content and/or images for your site.

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Block Layout

You are now actively creating a **CWB Button** component for your site. Each component has different options and fields to fill out, so every one is special in their own way.

Fill out all he fields for your first button. Make sure to pick a **Color,** type in your desired **CWB Button Text** and upload an optional **CWB Button Icon** image if you like as well.

In the **CWB Button URL** field, type in the name of the page you want to link the button with, then simply select it from the list. If you want to link to an external URL, just type in the full address here (IE: https://www.touchstoneenergy.com).

Set the **Button Target Type** to **_blank** (for a new tab) or **_self** (for the same tab).

Tip: If you need icons for your site, try out https://iconmonstr.com/ it's free!

Block Layout

For this example we are creating a **Contact Us** button that points to our Contact Us page.

If you want to get crazy, try adding some additional buttons to your header button block.

All you have to do is click the **Add CWB Button** to add another button to your set.

When you are done, click on the blue **Save** button in the bottom left corner of your screen.

Save

Block Layout

You should now have a **Header Buttons** block in your **Top Header Right** region of your block layout (theme layout). Let's click on **Back to site** to go home and check out the results.

BLOCK	CATEGORY	REGION
Header Buttons (100% Full Width) Place block		
No blocks in this region		
Top Header Left (50% Left) Place block		
✛ Search form	Forms	Top Header Left (50% Left) ▾
Top Header Right (50% Right) Place block		
✛ Header Buttons	Custom	Top Header Right (50% Right) ▾
Header Column 1 | Logo Place block		
✛ Site branding	System	Header Column 1 | Logo ▾
Header Column 2 | Social Media and/or Buttons Place block		
✛ Social Media Icons	Social Media Links Block	Header Column 2 | Social Media and/or Buttons ▾

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Block Layout

Awesome. We now have a button component in the top right header, if you added multiple it will probably look better than my example, because it would fill out the space more.

Any CWB Buttons that you add to the Top Right Header will automatically take on flex behavior for mobile devices. Now that's an added bonus right there!

Check out http://www.precorp.coop/ for a nice example of this live.
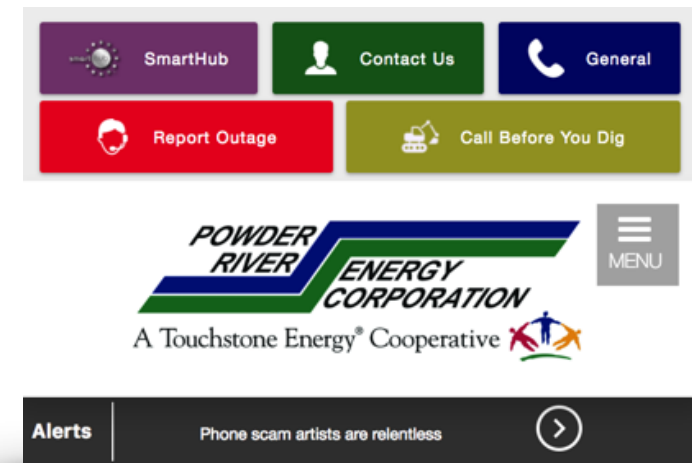
Block Layout

Now for a more advanced example.

Let's go back to the **Block Layout** page to turn on the site alerts. The alerts in CWB 3 are far superior to any version so far, so we should know how to use them.

See the region called **Midline - Alerts**? Sometimes we include a dash or hyper and then describe some good suggestions for these regions or we simply call the region something helpful like **Main Navigation**, so you know what should probably go here.

Click on the **Place block** button in the **Midline - Alerts** region.
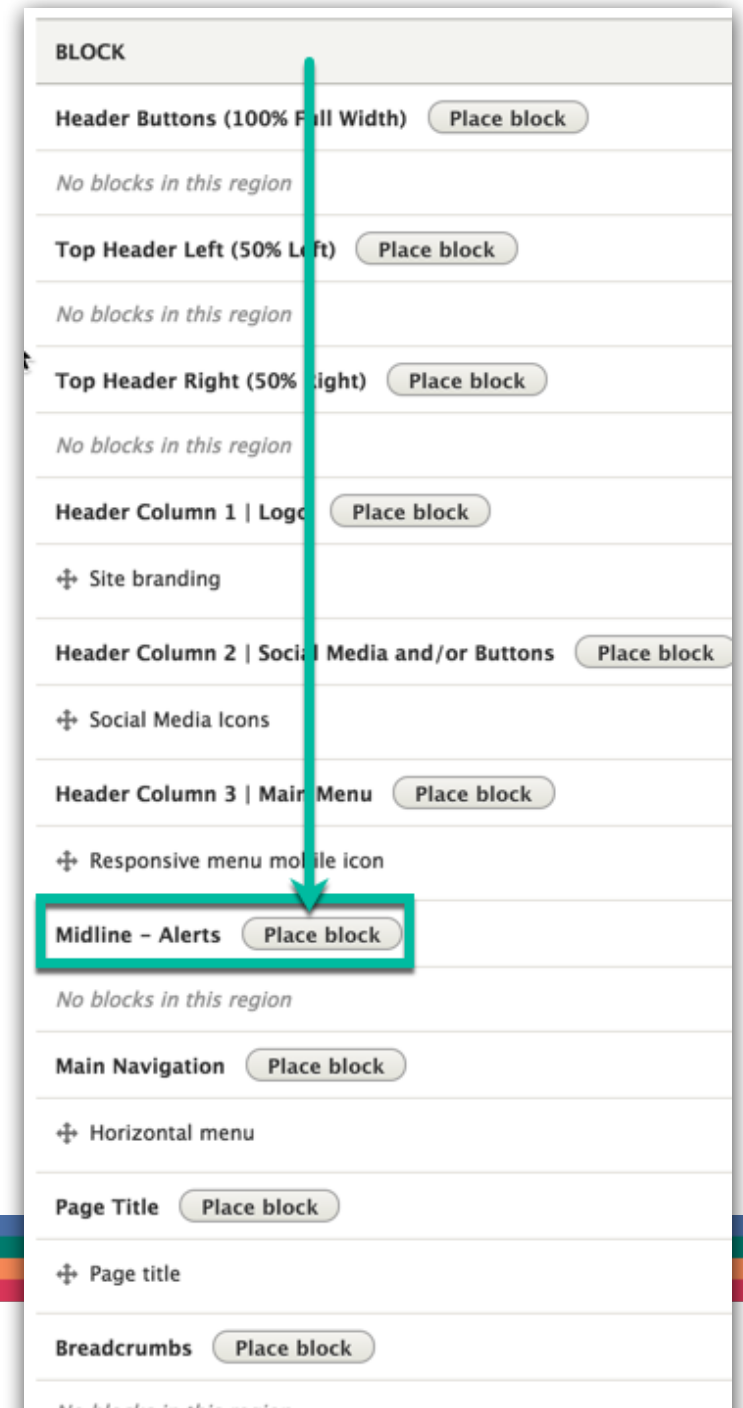
Block Layout

Scroll down until you find the **Alerts:Ticker** block and choose **Place block.**

Note: There are several different Alerts blocks, because the module has a few styling options. For this tutorial, we are only focusing on the Ticker style. If you want to explore the other styles, I would recommend this training video on alert management – when you have time of course(https://vimeo.com/album/4838678/video/279666335).
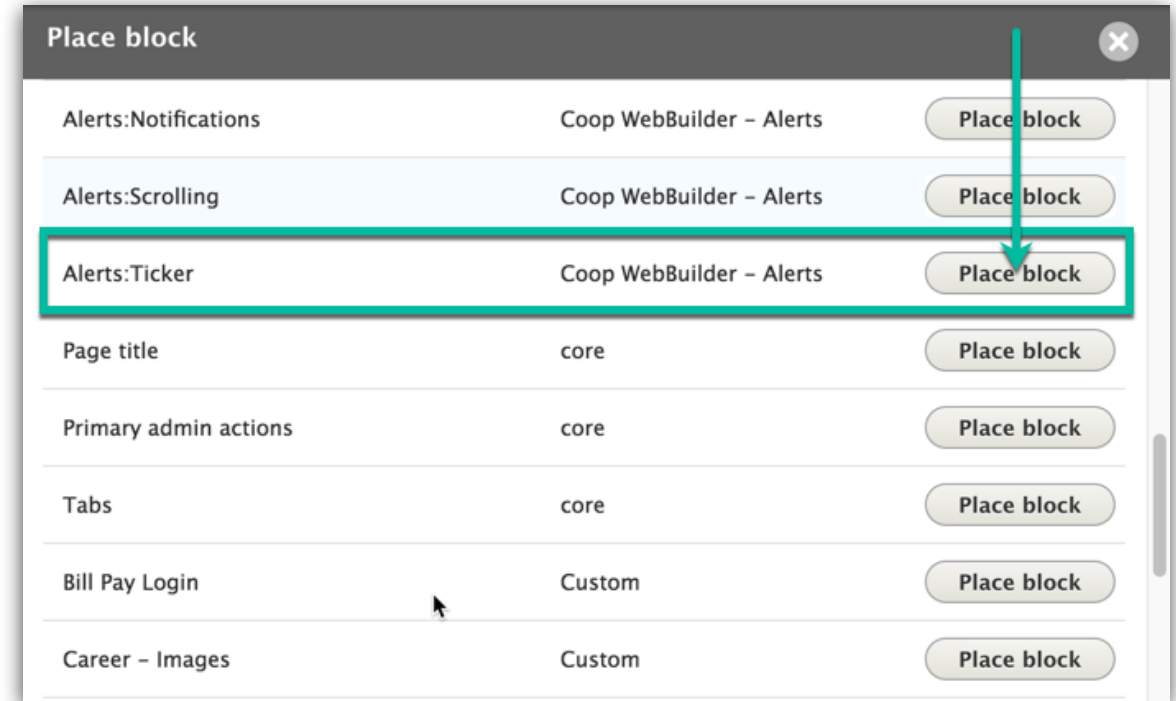
Block Layout

Whenever you place a block on your site, you have the ability to customize the **Title** of the block as well.

The default setting for the **Alerts** block has a **Title** set to **"Latest"**, which looks like this...
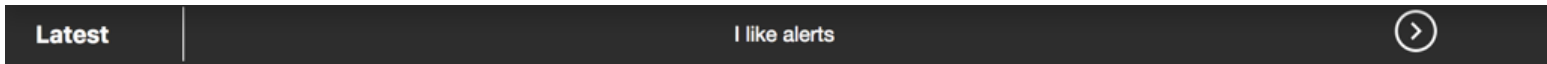
If you wanted to change the verbiage from **Latest** to something else, the **Title** setting is the way to do it. Change the **Title** if you wish by checking **Override title** and then place the **Alerts** block next by clicking **Save block** in the lower left of your screen.

Block Layout

You will see the **Alerts:Ticker** block is now placed in the **Midline - Alerts** region of your theme.

Good job! You have just assigned content to an area of your theme with just a few clicks of your mouse.

Let's go back to the homepage (click on Back to site) to check it out.
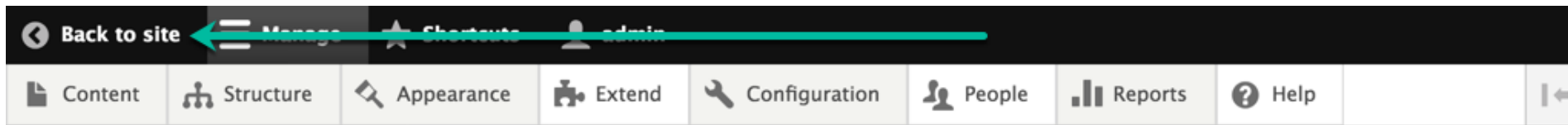
Block Layout

We need to add an alert to our site before the alerts will actually show up in the region we assigned them to. So, don't panic if you don't see anything different yet, that's to be expected. We don't want to show you an empty alert area if you don't have any current published alerts, that would just be rude!
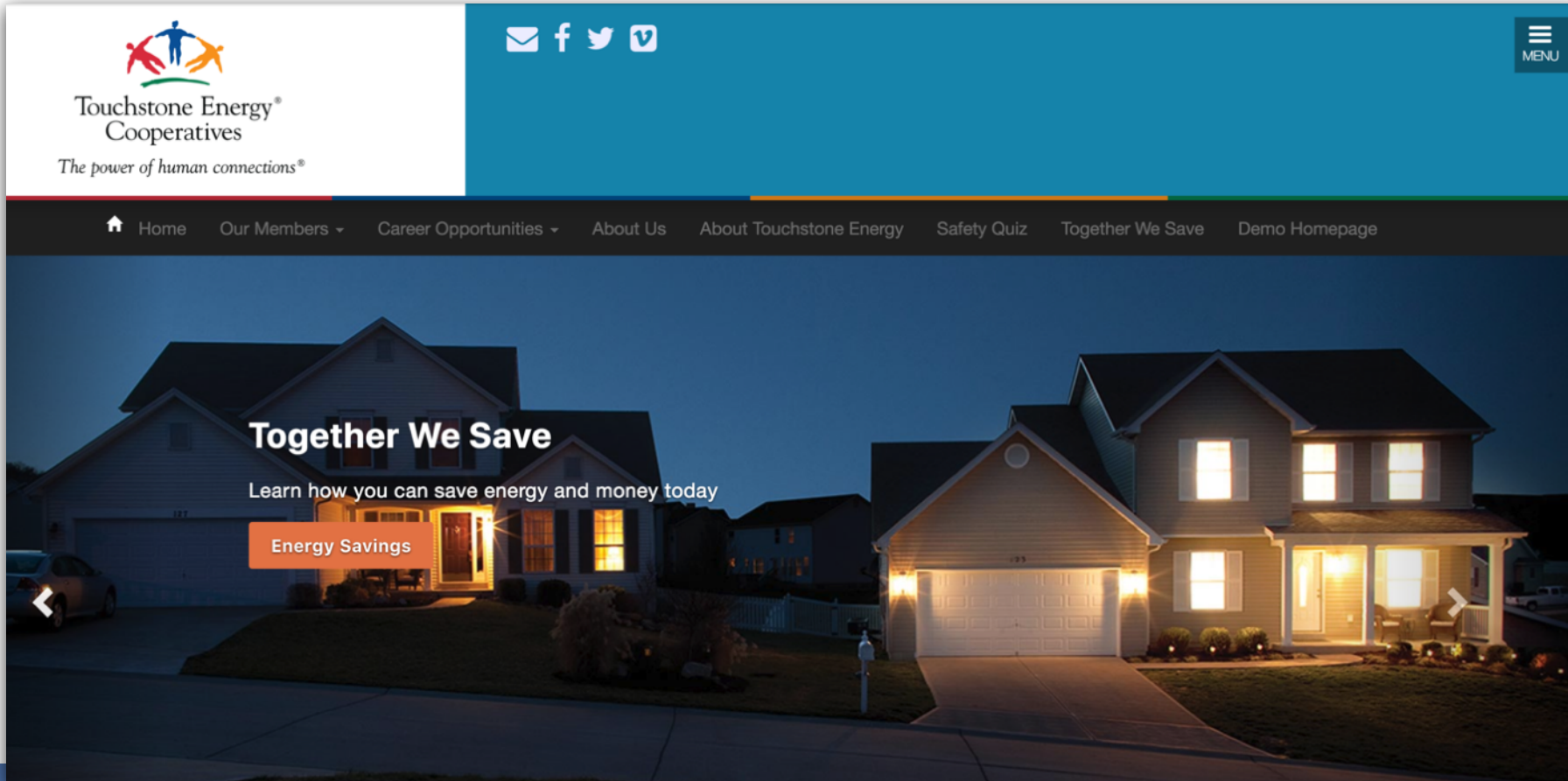
Block Layout

Let's quickly add an alert to our site. The alert list can be found under **Structure / Alert List** or by visiting (/admin/structure/alert).

The first thing you will notice is that there are no alerts yet. Let's add one by clicking the blue **+Add Alert** button.

Block Layout

Name (#1) : Give your Alert a name
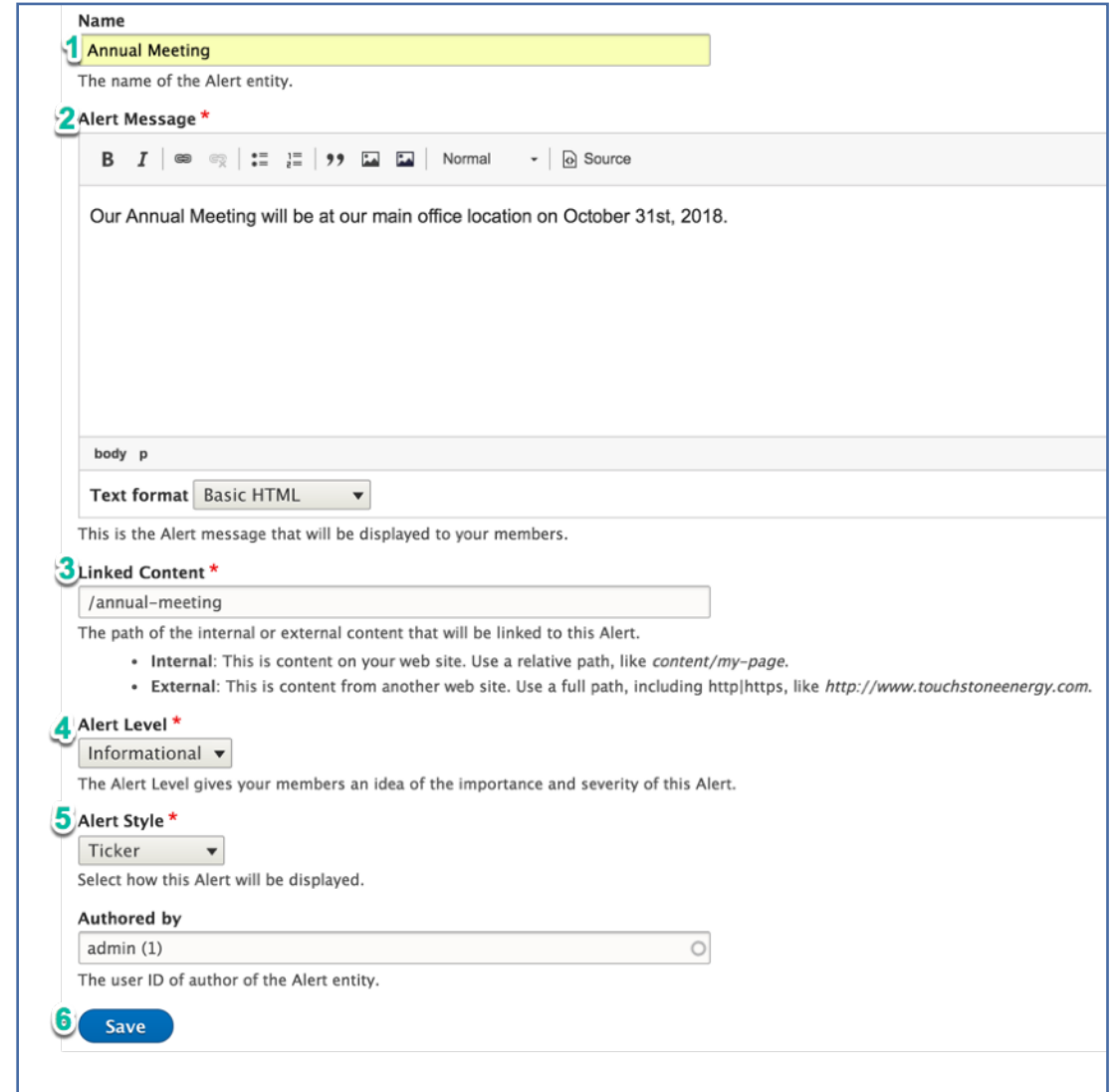
Alert Message (#2) : Type out the body of your alert, this is what shows in the scrolling alerts window.

Linked Content (#3) : Link the alert to another page on your site that has more information about the alert. This is assuming I created an Article called "Annual Meeting".

Alert Level (#4) : Some alert styles showcase an alert level and use color coding to indicate how important the alert is, for the style we are using this setting doesn't need to be changed.

Alert Style (#5) : Change this to **Ticker**, which is the alert style we inserted in the block layout.

Save (#6) : Click the Save button when you are done.

Block Layout

Let's go back to the homepage and check it out now.

You should see the **Alerts** block right under your logo.

Time to celebrate!

Feel free to go back to **Structure / Alerts List** and add as many alerts as you like to your site. Once you add a few, you will notice that you can navigate through the alerts with the circled ">" on the right.
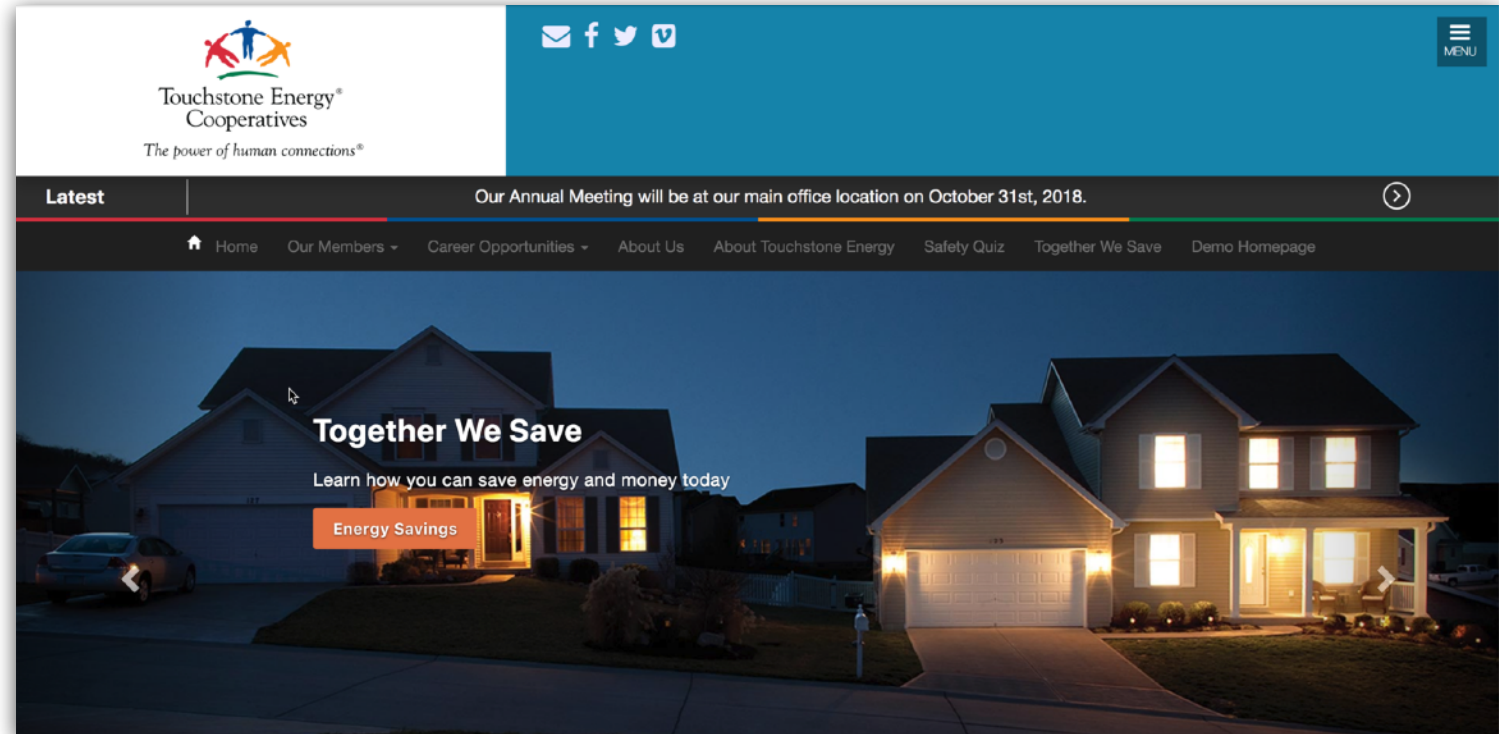
Final Tasks

Setting up Google Analytics
- Let's make sure your analytics are setup, before you go live with your new design.

To get started, visit any administrative page on your site, you can just click on **Content** for now.

Click on **iSean** in the bottom right of your screen.

Choose the **Configuration Dashboard** link next.
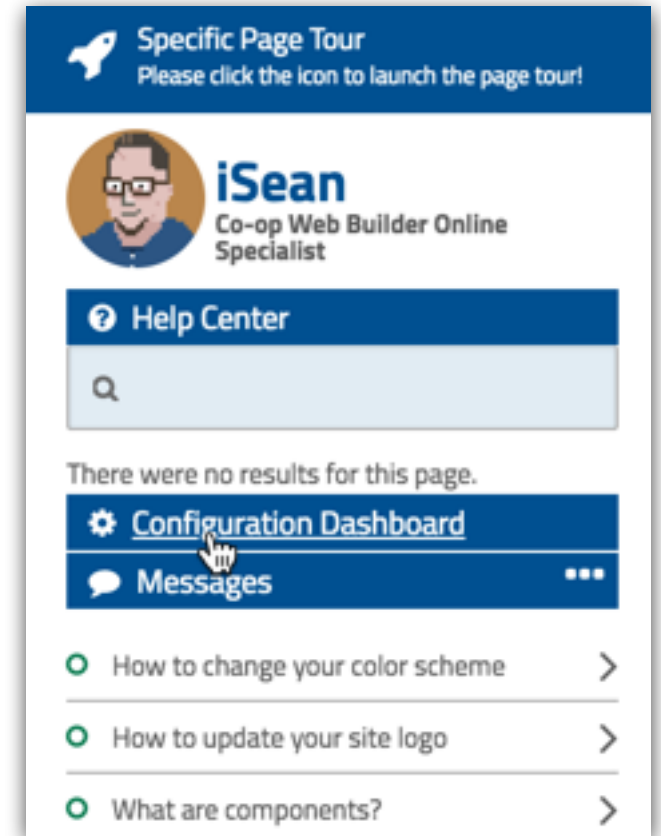
Final Tasks

This is the CWB 3 Dashboard, where you can do quite a few things (most used are plugin feature settings and user management) quickly.

Go ahead and click on the **Feature Settings** button for now. This will show you all the modules (plugins) that are currently installed on your site. We will be looking for the Google Analytics module, so we can set it up next.
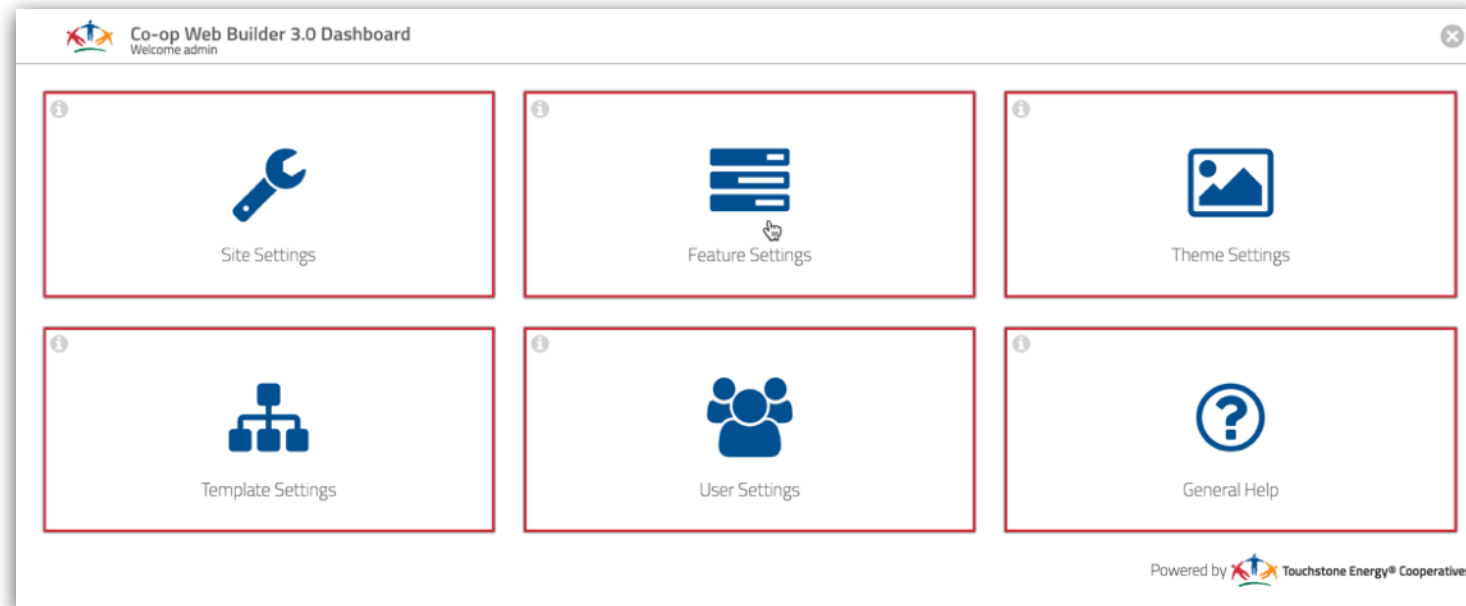
Final Tasks

First (#1) locate the **Google Analytics** plugin and then click on the gear icon (#2). This will populate the window on the right of the screen with the plugin settings. Go ahead and enter your own Universal Analytics (UA) number in the **Web Property ID** field (#3). When you are done click on **Save configuration** (#4). That is all you have to do in order to get your site to start tracking data. Simple huh?

Final Tasks

Another good idea is to look into configuring reCaptcha for your website. You can click the gear icon to setup this plugin as well. It will protect your login page and webform submissions from abuse and it is accessibility friendly to boot. If you don't have an account with reCAPTCHA, use the link to sign up for free.

Video Tutorial – We captured how you can setup reCAPTCHA during the first 20 minutes of this Town Hall webinar (https://vimeo.com/291543464). If you have any questions, please let us know at coopwebbuilder@nreca.coop.