chx4-Web

Running Your Site

Contents

Getting started 7
- Log in 7
- If you've forgotten your password 8
- Home 8
- Find your way around 9
- Your profile 10
- Log out 11

Your first page, step by step 12
- Before you start: get your document ready 12
- Step 1: Open the list of pages 12
- Step 2: Start a new page 13
- Step 3: Give the page a name 13
- Step 4: Bring in your Word document 14
- Step 5: Read it through 15
- Step 6: Save it 15
- Step 7: Publish it 16
- Step 8: See it on your website 17
- Changing the page later 17
- Another way: copy and paste 18
- What comes across from Word, and what doesn't 18
- If something goes wrong 19

Designing your site 20
- The look comes from the site's styling 20
- Build from blocks, and reuse them 20
- Pages, templates and blocks 20
- The header and footer 21
- Write for the people reading 21
- Check what visitors will see 21
- Working with a designer or agency 21

Home 23
- Content at a Glance 23
- Form Submissions 24
- Draft Content 24
- Pending Approval, and Approved 24
- A message for your team 24

CMS Pages 25
- Find a page 25

Open a page 25
Copy a page 26
Make a QR code for a page 26
Add a page 27
Archive pages 27
How visitors see it 27
The page designer 28
The page's details 28
Page overview 29
Add a block, a picture or a form 31
Change a block's content 31
Change how a block looks 31
Animate a block as it scrolls into view 32
Change a row 34
See the content light and dark 34
Preview the page 35
Page-specific CSS 36
Save, submit and publish 36
CMS Blocks 38
Find a block 38
Open a block 38
Add a block 39
Start from the block library 40
What goes in a block 41
Publish and archive a block 42
Changing a block that's already on pages 42
Archive blocks 43
Galleries, carousels and scrollers 44
How they're put together 44
Make the block 45
Add one to a page 46
Galleries 48
Horizontal scrollers 50
Carousels 52
Alt text 54
When you change the block 54
CMS Templates 56
Find a template 56
Open a template 57
Make a template from a page 57

Add a template....58
Copy a template....58
Publish and archive a template....58
Start a page from a template....58
List the pages made from a template....58
CMS Forms....59
Find a form....59
A form has two parts....59
Add a form....59
The form's settings....60
Manage fields....61
Archive forms....64
Form submissions....65
Page overview....65
Find submissions....65
Read a submission....66
Work through a submission....67
Export submissions....67
Media....68
Page overview....68
Add files....69
Preview a file....69
Use a file on a page....70
Delete files....70
Menus, header and footer....71
Choose the header and footer....72
Edit a menu....73
The footer menu....73
Publish, archive and history....74
Restyling the header and footer....74
The tenant app's own content....75
Content panels....75
Sub Header Menu....76
Approvals and version history....77
Versions....77
Turn approvals on....77
Send a change for approval....77
Approve a change....79
Publish an approved change....81
Version history....83

Compare two versions 84
Site styling and themes 86
Site Styling 86
Themes 88
Users and permissions 91
Page overview 91
Add a user 91
Change a user 92
Reset someone’s password 93
Remove a user 93
Site configuration 94
Site Configuration 94
Password Policy 95
Reference Data 97
Redirects 98
Page overview 98
Add a redirect 98
Change a redirect 99
Delete redirects 99
Domains 100
Page overview 100
Add a domain 100
Create the DNS records 101
Wait for certificates 101
Make it your main address 101
Go back to the default address 101
Remove a domain 101
Plugins 102
Page overview 102
Install a plugin 102
Open a plugin 103
Decide what a plugin may do 103
Update a plugin 103
Remove a plugin 103
Email templates and history 104
Email templates 104
Email history 106
Export and import 107
Export your content 107
Import content 108

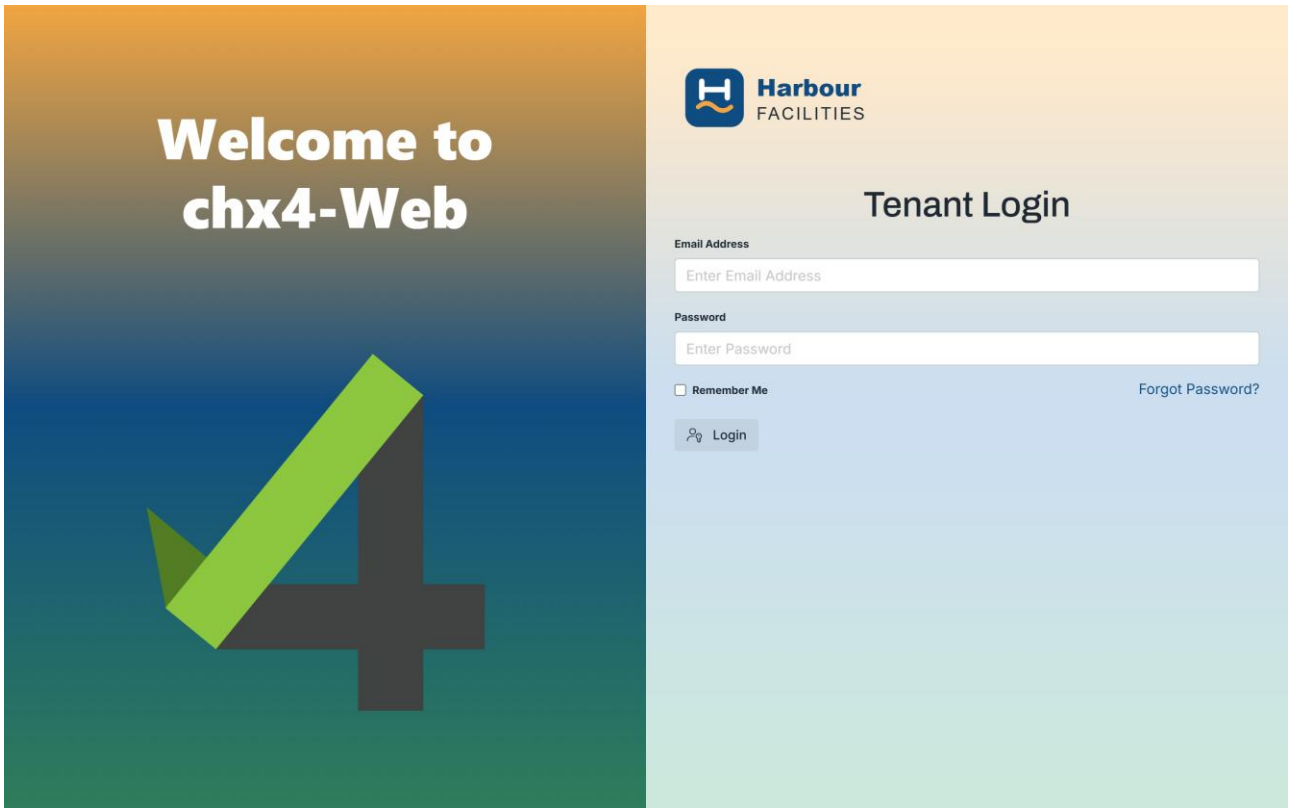
Styling your site: notes for designers....110
Where the styling goes....110
Build on the palette....110
A dark version....111
Keep clear of Bootstrap and the platform....111
How wide a plain page runs....111
Classes the site’s people choose....112
Writing blocks that survive editing....112
The header and footer....112
Before you hand over....112

Getting started

chx4-Web runs your organisation's website. Visitors see the public site at your web address. You look after it in the **tenant app**: its pages, the blocks they're built from, its menus and forms, its styling, and the people who can change them. This guide is about the tenant app.

Log in

The tenant app is at your site's address followed by `/tenant`, for example `https://www.harbourfacilities.com.au/tenant`.



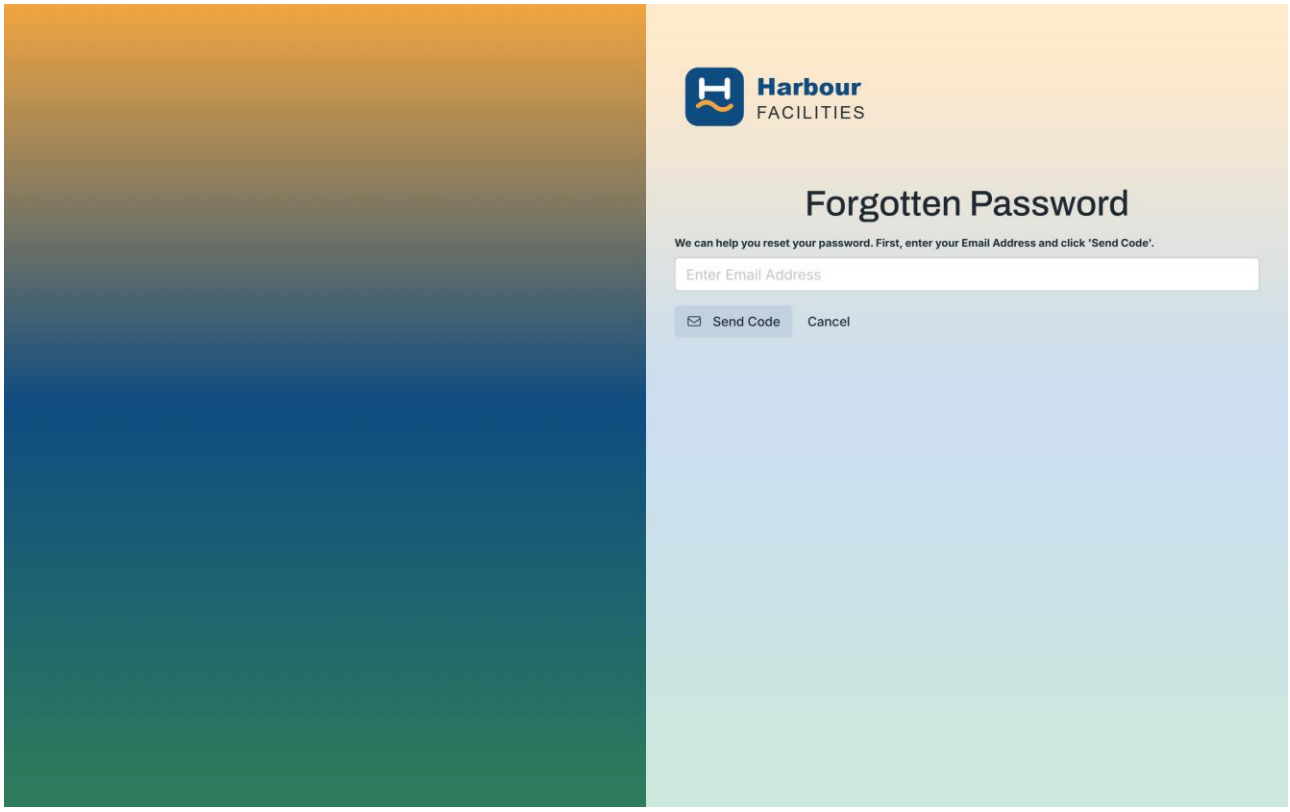
The tenant login

1. Enter your **Email Address** and **Password**.
2. Tick **Remember Me** to stay logged in on this computer.
3. Tick **I'm not a robot** below the password. (The guide's pictures come from a test site that doesn't ask, so the box isn't in them.)
4. Click **Login**.

If your organisation uses Microsoft sign-in, there is also a **Login with Microsoft** button beside **Login**. Use it to sign in with your work account instead of a password.

Your tenant app shows only what your login is allowed to do. See *Users and permissions*.

If you've forgotten your password



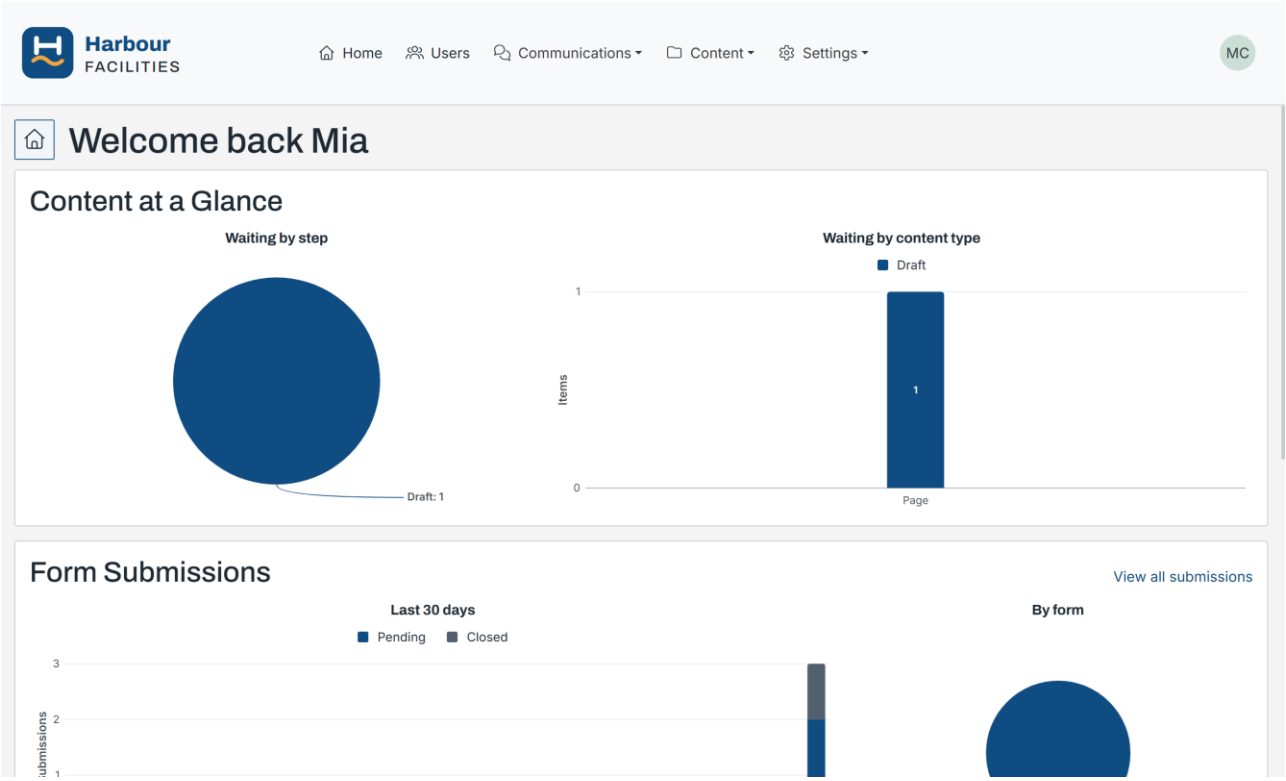
Forgotten Password

1. On the login page, click **Forgot Password?**.
2. Enter your **Email Address** and click **Send Code**. chx4-Web emails you a verification code.
3. Enter the **Verification Code** from the email, then a **New Password** and **Confirm Password**. The password has to meet your organisation's password policy, which is shown beneath the box. See *Site configuration*.
4. Click **Reset Password**. A message says **Your password has been reset**, and you can log in.

The code takes a moment to arrive. If it doesn't, check your junk folder, or click **Resend Code**, which takes you back to the first step with your email address filled in so you can send another. **Cancel** takes you back to the login page.

Home

You start on **Home**, which shows how much content is waiting at each step and what visitors have sent in through your forms. See *Home*.



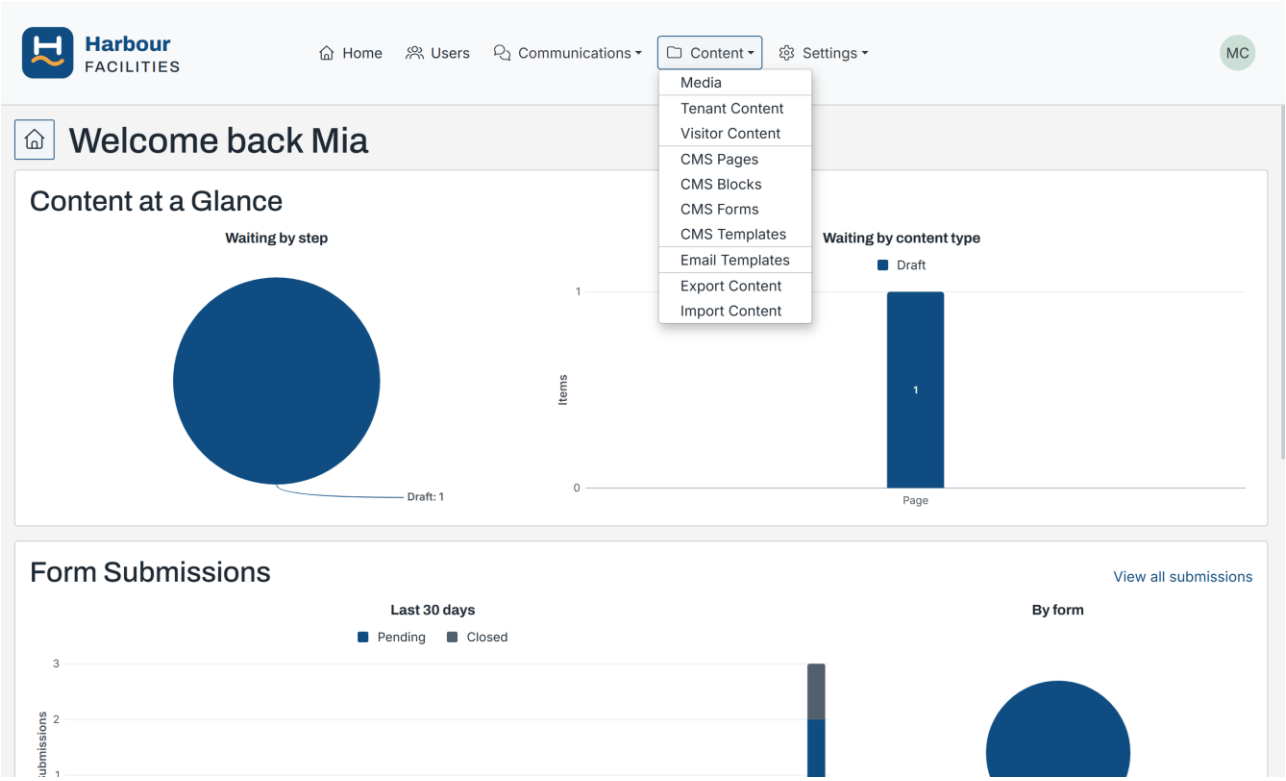
Home

Find your way around

The menu across the top holds everything else:

Menu	What's in it
Home	Where you start.
Users	The people who can log in to the tenant app, and what each can do.
Communications	**Form Submissions**, what visitors sent through your forms, and **Email History**, the emails chx4-Web has sent for you.
Content	Your site: **Media**, **CMS Pages**, **CMS Blocks**, **CMS Forms**, **CMS Templates**, the content of the site's menus, header and footer, email templates, and **Export Content** and **Import Content**.
Settings	How the site looks and behaves: **Site Styling**, **Site Configuration**, **Password Policy**, **Reference Data**, **Redirects**, **Domains**, **Plugins** and **Themes**.

Point at a menu to open it.

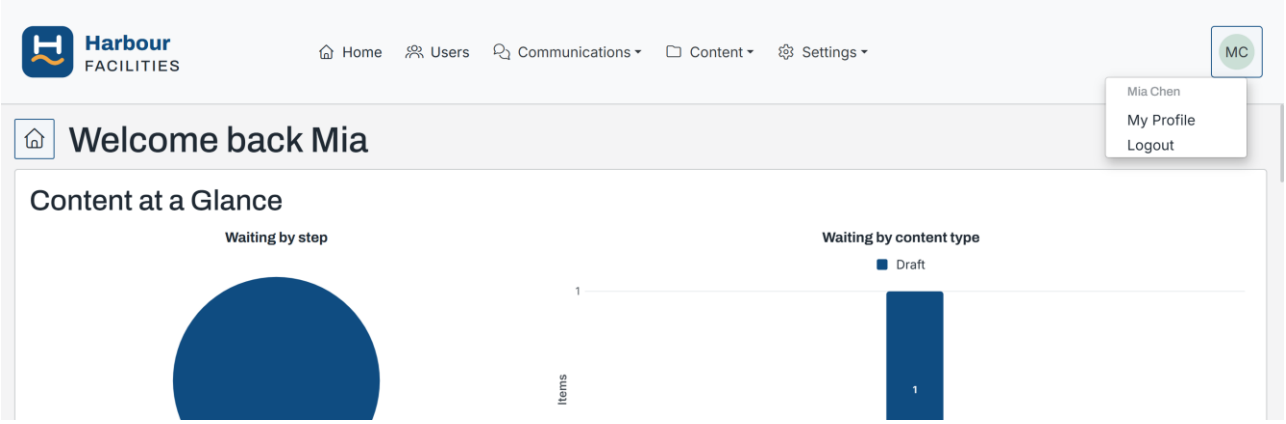


The Content menu

The same links are repeated in the footer, at the foot of every page.

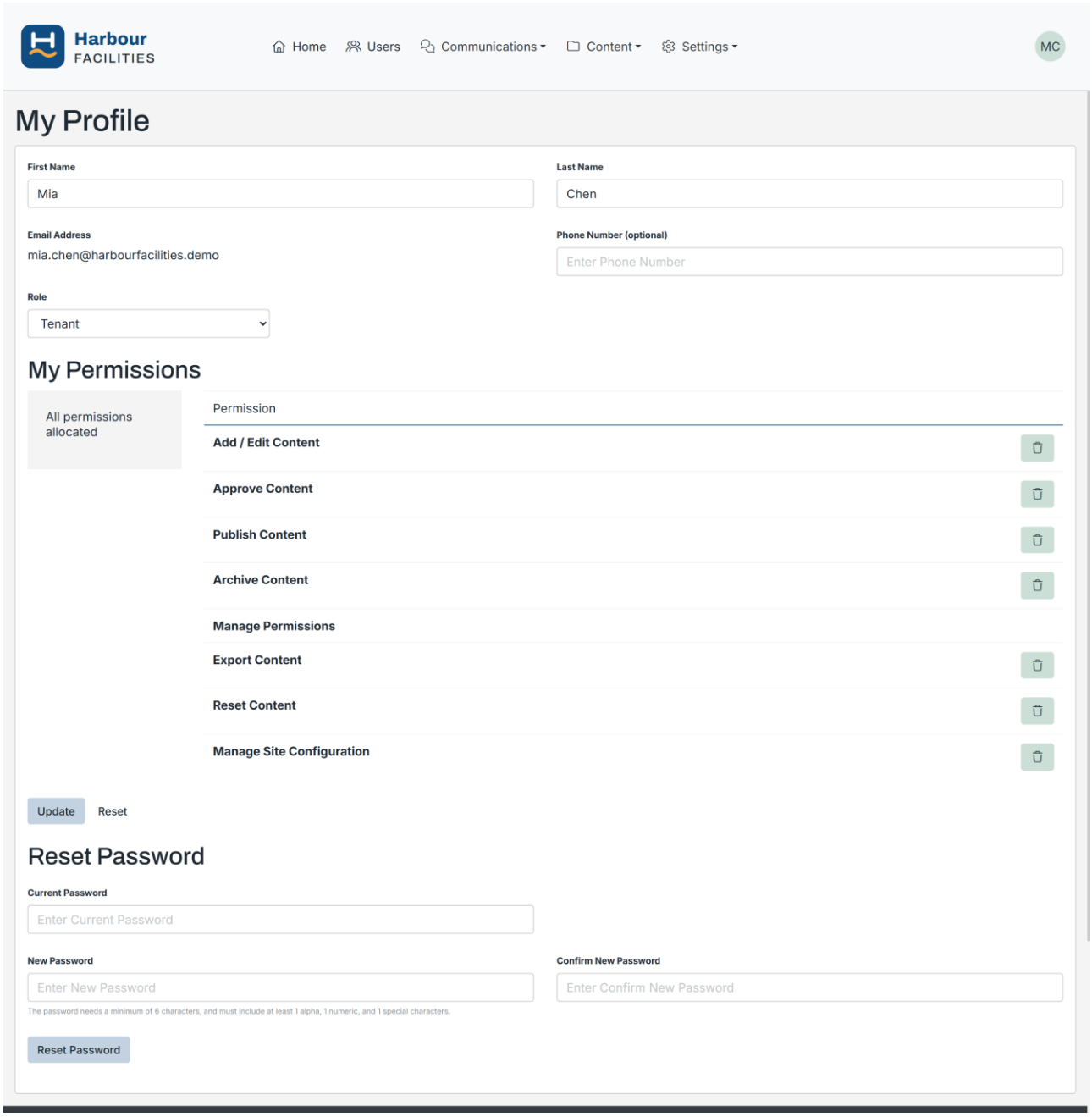
Your profile

Your initials, at the right of the menu bar, open a menu with your name, **My Profile** and **Logout**.



The menu under your initials

My Profile shows your details.



My Profile

- Change your **First Name**, **Last Name** and **Phone Number**, and click **Update**. **Reset** undoes your changes. Your **Email Address** is your login and can't be changed here.
- Under **My Permissions** are the things your login is allowed to do. See *Users and permissions*.
- Under **Reset Password**, enter your **Current Password**, then a **New Password** and **Confirm New Password**, and click **Reset Password**.

> **Note:** you can't switch off your own login here, or take away your own **Manage Permissions**: either would leave you unable to put it back.

Log out

Open the menu under your initials and click **Logout**. If you ticked **Remember Me**, logging out is what stops this computer from logging you straight back in.

Your first page, step by step

You don’t need to know anything about web design to put a page on your website. If you can write a document in Word, you can publish it. This module goes through it one step at a time, from a Word document on your computer to a page anyone can visit.

The rest of the guide covers the page designer, blocks, styling and everything else. You don’t need any of that for this. You can come back to it later, or never.

> **Who can do this:** you need the **Add / Edit Content** permission to make a page, and **Publish Content** to put it on the site. If you’re not sure what you have, ask whoever looks after your site’s users. If you can make pages but not publish them, someone with **Publish Content** can do the last step for you.

Before you start: get your document ready

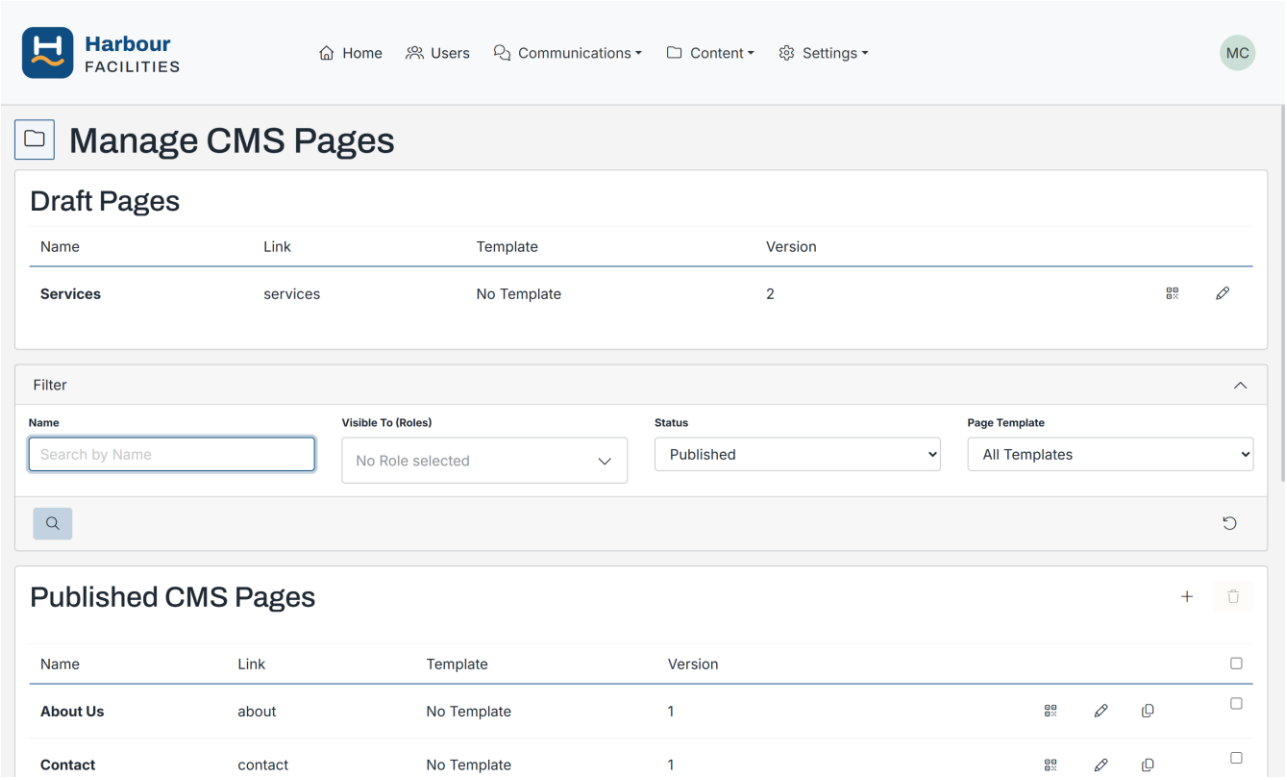
Write your page in Word as you normally would. A few habits make it come out better on the website:

- **Use Word’s heading styles for your headings.** Click in the heading, then choose **Heading 1** or **Heading 2** on Word’s **Home** tab, rather than just making the text bigger and bold. The website then knows which lines are headings. (If you forget, it usually guesses right.)
- **Use Word’s bullet and numbering buttons for lists.** Typed dashes and numbers are turned into lists too, but the buttons are more reliable.
- **Don’t worry about fonts, colours or text sizes.** The website uses its own, so your page matches the rest of the site. Whatever you choose in Word is left behind.
- **Save it as a Word document.** In Word, choose **File**, then **Save As**, and make sure the type is **Word Document (.docx)**. Older Word files (.doc), PDFs and other formats can’t be used.
- **Keep it under 5 MB.** That’s plenty for text. If your document has a lot of large photos, see *If something goes wrong* below.

Step 1: Open the list of pages

1. Log in to the tenant app (see *Getting started*).
2. Point at **Content** in the menu across the top, then click **CMS Pages**.

You’ll see a list of every page on your site.



The list of pages

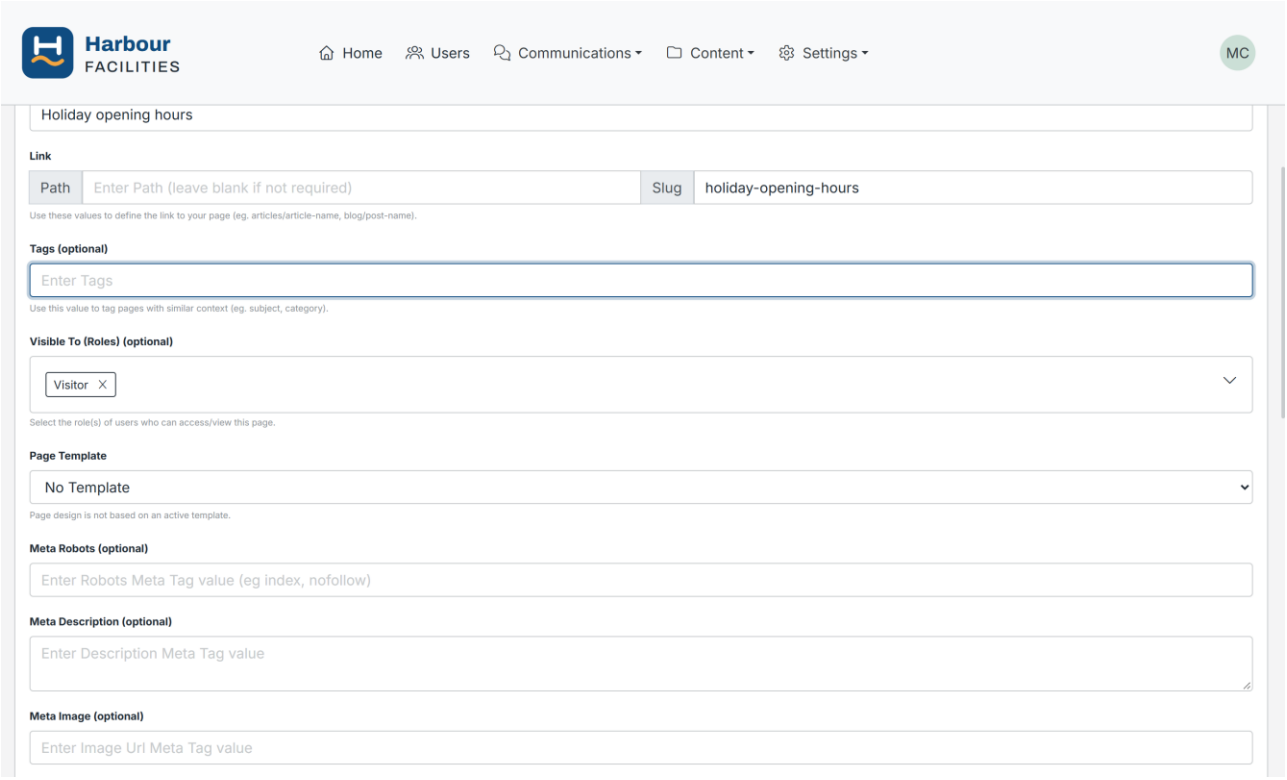
Step 2: Start a new page

Click the **+** button above the list, at the right. Its label, **Add CMS Page**, appears when you point at it.

A new, empty page opens.

Step 3: Give the page a name

There's only one box you need to fill in at the top of the page. The others either fill themselves in or can be left as they are.



The page's name, its address, and Visitor chosen for who can see it

1. In **Name**, type what the page is called, for example `Holiday opening hours`. This is how the page appears in your list of pages.
2. Beside **Link** there are two boxes, **Path** and **Slug**. You don't need to type in either. When you click away from **Name**, **Slug** fills itself in from it: `Holiday opening hours` becomes `holiday-opening-hours`. That's the end of the page's web address, so the page will be at your website's address followed by `/holiday-opening-hours`. Leave **Path** empty.

   You can change the slug if you'd like a shorter address, for example `holidays`. Use small letters, with a hyphen (`-`) between words and no spaces.
3. Check that **Visible To (Roles)** says **Visitor**. It's chosen for you, and it means anyone visiting your website can see the page. Leave it as it is.

> **Important:** if you ever remove **Visitor** from **Visible To (Roles)**, the page is hidden from your website's visitors, who get a "page not found" message instead.
>
> **Tip:** choose the address carefully. Once people have the link, changing it means the old one stops working.

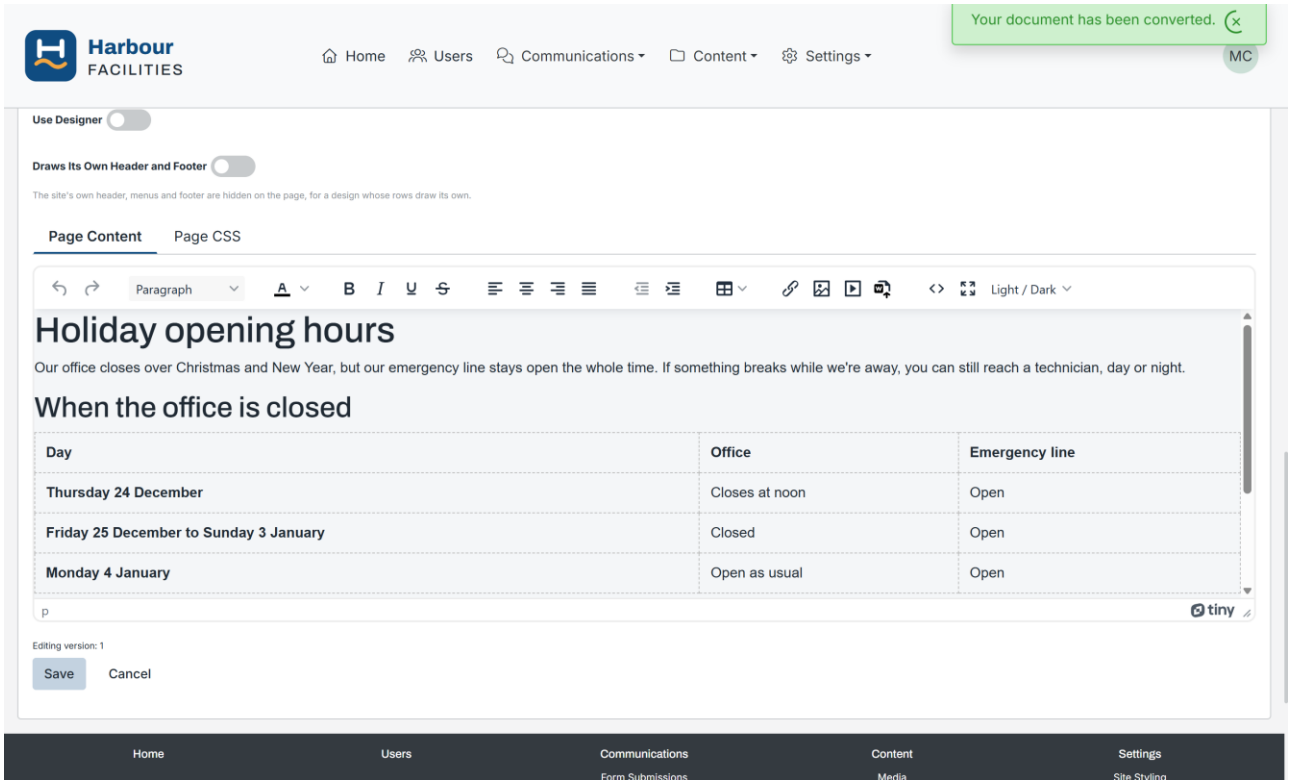
Step 4: Bring in your Word document

1. Find **Use Designer**, below **Name** and the other boxes, and click its switch so that it's off. A new page starts in the page designer, which lays a page out in blocks. This module uses the plain page editor instead.
2. Scroll down to **Page Content**. It's a large box with a row of buttons along the top, like a word processor.
3. Click the **Import Word Document** button. It's a small **W** with an arrow, towards the right of the row of buttons, just after the buttons for a picture and a video.



The Import Word Document button, on the toolbar above the page's content

4. A window opens to choose a file. Find your Word document, click it, and click **Open**.
5. Wait a moment while it's converted. When it's done, a message says **Your document has been converted**, and your words appear in the box.



The document, converted into the page

> **Note:** importing a document replaces everything that's already in the box. On a new page that doesn't matter. On a page you've already written, it does: see *Changing the page later*.

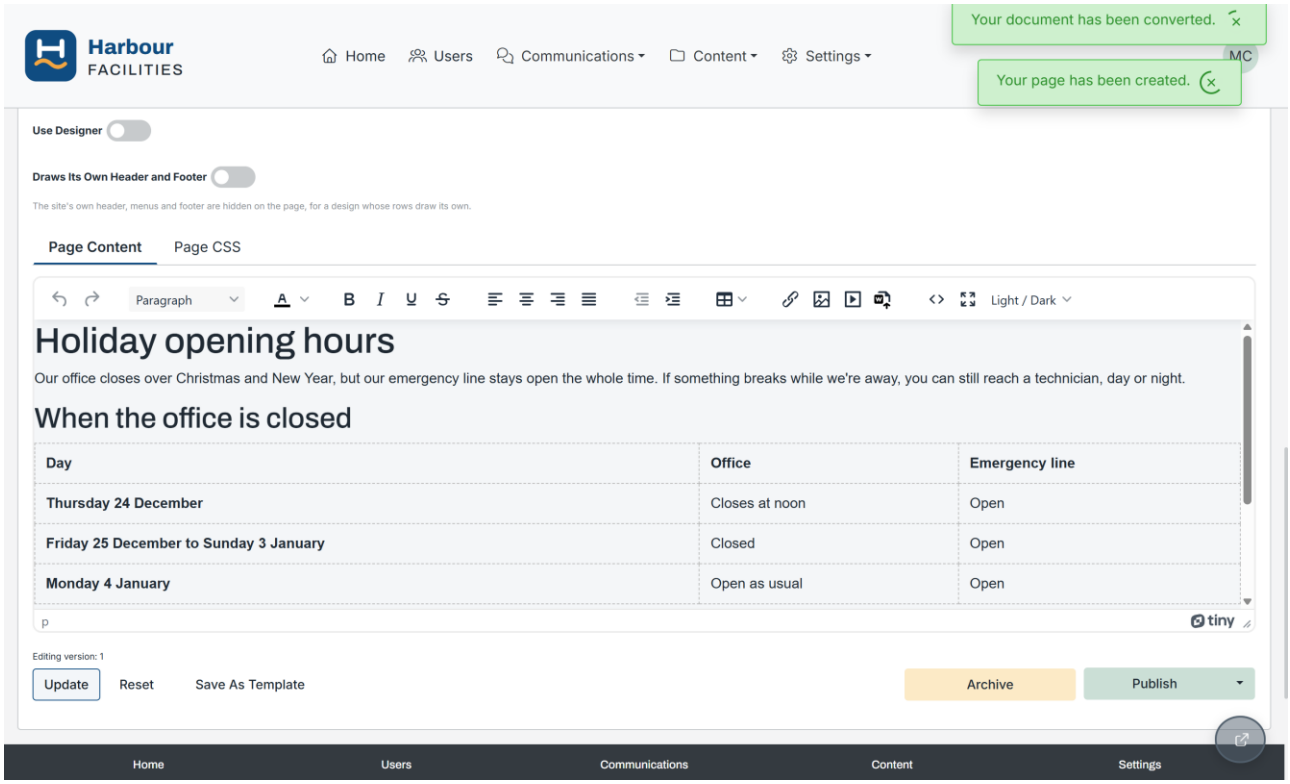
Step 5: Read it through

Have a look over the page in the box. You can change anything here as you would in Word: click where you want to type, or select some text and use the buttons along the top, such as **B** for bold. The curved arrow at the far left undoes your last change.

If something didn't come out as you hoped, the section *What comes across from Word, and what doesn't* explains why.

Step 6: Save it

Scroll to the bottom of the page and click **Save**. A message says **Your page has been created**.

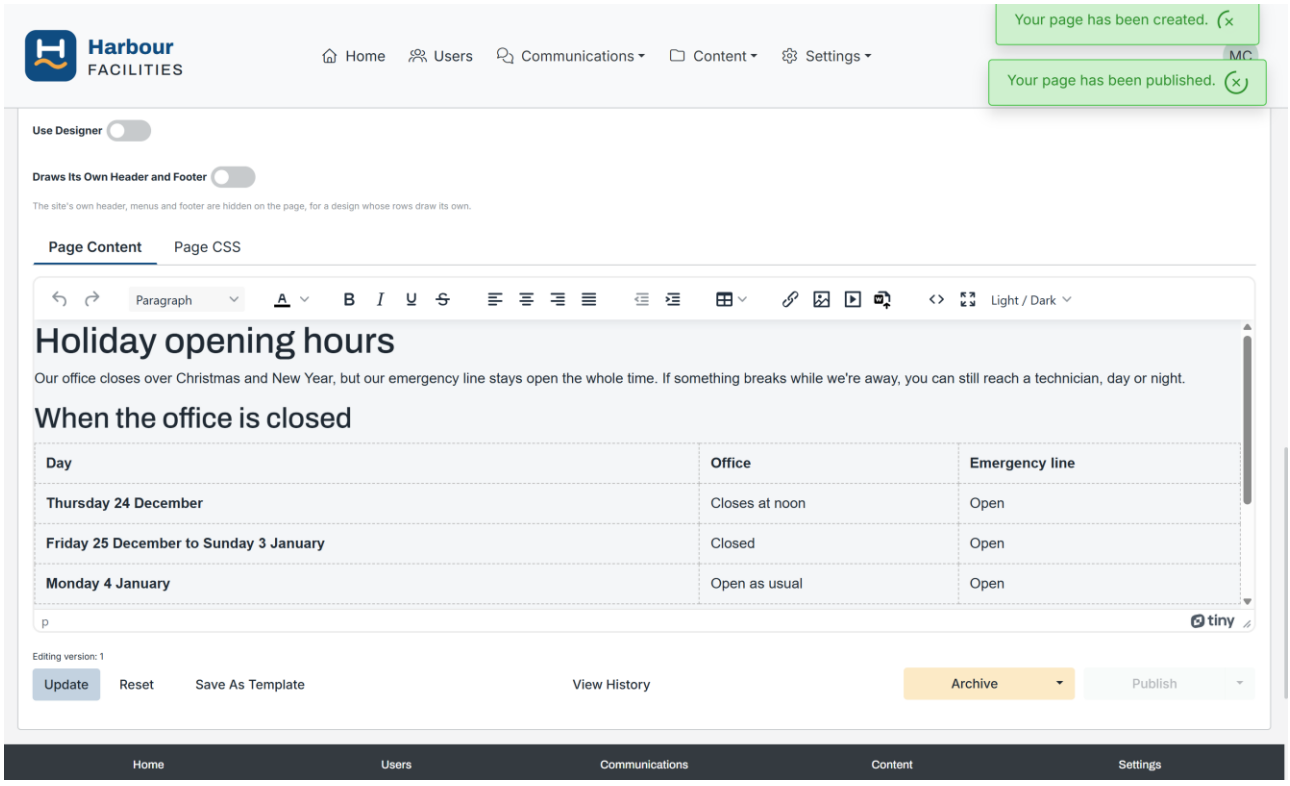


The buttons at the foot of the page, after saving

Saving keeps your work, but **the page isn't on your website yet**. It's a draft, which only people who can log in here can see. That's the next step.

Step 7: Publish it

Click **Publish**, at the bottom right. A message says **Your page has been published**.



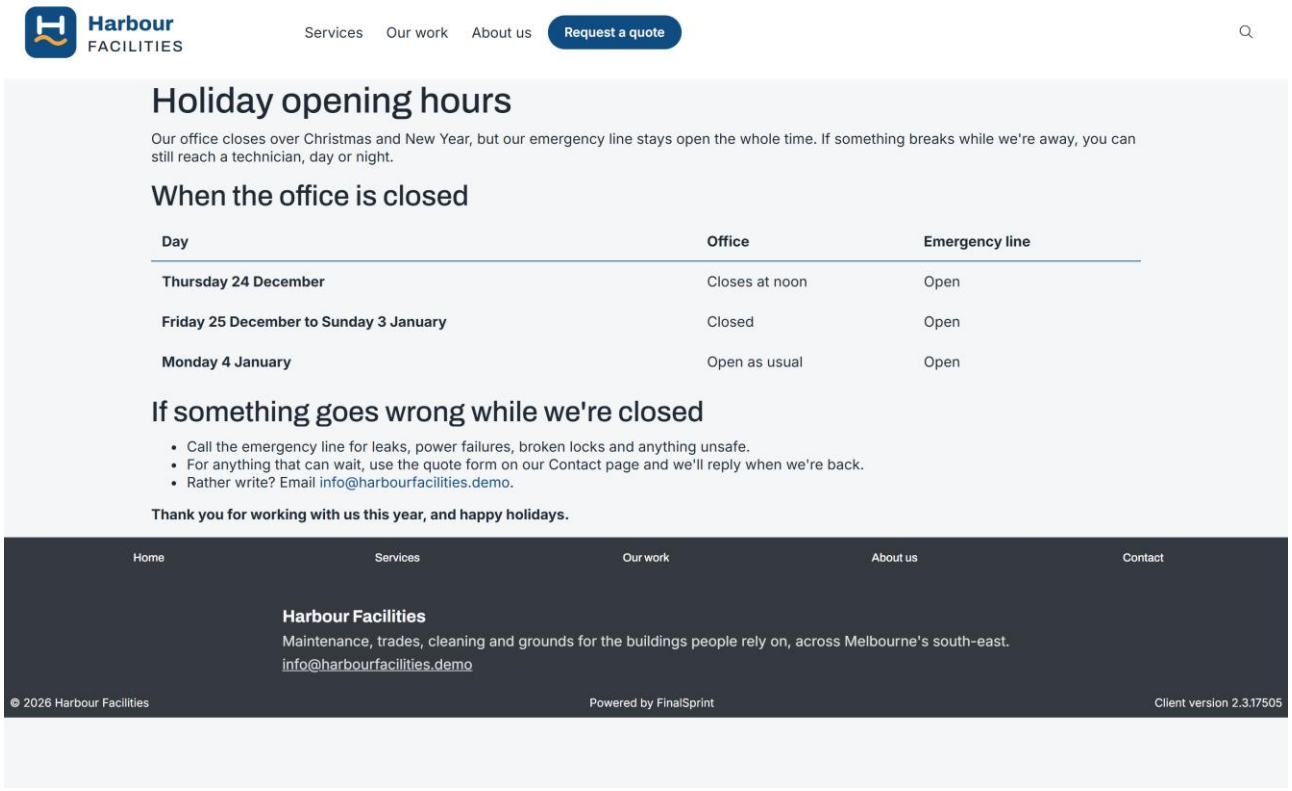
The page, published

Your page is now on your website.

> **Note:** some organisations have each page checked before it goes live. If you see **Submit for Approval** where **Publish** would be, click it. The person who approves pages is told, and the page goes live once they approve it. See *Approvals and version history*.

Step 8: See it on your website

Open your website in your web browser, and add the page's address to the end: for example `www.yoursite.com/holiday-opening-hours`. This is what your visitors see.



The page on the website, as visitors see it

Notice that the page has picked up your website's own fonts and colours, and its header and footer. How wide the text runs is part of your site's styling too: here it sits in the middle of the screen with space either side, and on another site it might fill the width.

> **Note:** a new page has its own address, but it isn't added to your site's menu by itself. To put it in the menu, see *Menus, header and footer*, or ask whoever looks after your site.

Changing the page later

1. Go to **Content** › **CMS Pages** and click the pencil beside the page.
2. Make your changes in **Page Content**.
3. Click **Update** to save them, then **Publish** to put them on the website.

If you've changed the Word document and want to bring it in again, use **Import Word Document** the same way. Remember that it **replaces** what's in the box, including any changes you made on the website rather than in Word. Keep your Word document as the one place you make changes, and importing again is always safe.

Another way: copy and paste

You can also copy text from Word (or from an email or another website) and paste it into **Page Content**. A window asks how to paste it:

- **Remove formatting** keeps your headings, lists, links and bold, and leaves out Word's fonts and colours, so the text matches your website. This is the one to choose.
- **Keep formatting** brings Word's fonts, colours and sizes with it, which can make the page look out of place on your site.

Copy and paste is handy for a paragraph or two. For a whole document, **Import Word Document** is quicker and more thorough.

What comes across from Word, and what doesn't

The import turns your document into a web page. It keeps what your document *says* and how it's *organised*, and leaves how it *looks* to your website.

What comes across well

In your document	On the page
Headings, from Word's heading styles	Headings, in your site's style. A short bold line on its own is usually made a heading too.
Paragraphs and line breaks	Paragraphs and line breaks.
Bulleted and numbered lists, including lists inside lists	Lists. Bullets and numbers you typed yourself are turned into lists too.
Bold, *italic*, underline, ~~strikethrough~~, superscript and subscript	The same.
Tables, including a header row and merged cells	Tables.
Links to websites and email addresses	Links that work.
A table of contents	Links that jump to each heading. Page numbers are left out, since a web page has none.
Pictures (photos, PNG and JPEG images)	Pictures, with their size and any caption.
Tracked changes	The document as it would read with every change accepted.

What's left behind

- Fonts, text sizes, colours, highlighting and spacing. Your website's own are used instead.
- Headers and footers, footnotes and comments.
- Text boxes, and anything inside them.
- Some kinds of drawing, such as shapes drawn in Word and some charts. Ordinary pictures are fine.
- Columns: text set in two or more columns comes out as one.

Things to know

- **Pictures stay inside the page.** They aren't added to your **Media** library, so you can't use them on another page, and very large photos make the page slow to open on a phone. For a page with lots of photos, it's better to make the pictures smaller first (see below).
- **It replaces, it doesn't add.** Importing puts the document in place of whatever was in **Page Content**.

- **It's a copy, not a link.** Changing the Word document afterwards doesn't change the website. You import it again (see *Changing the page later*).
- **It works in the page designer too.** This module uses the plain page editor, which gives you a simple page of words and pictures. A page laid out in the page designer, in rows of blocks, can take a Word document into any of its text blocks, one block at a time (see *Bring in a Word document* in *The page designer*).
- **Every document is checked for viruses** before it's converted.

If something goes wrong

"This file cannot be uploaded. It exceeds 5MB." The document is too big, nearly always because of its photos. In Word, click a picture, then on the **Picture Format** tab choose **Compress Pictures**, untick **Apply only to this picture**, choose a lower resolution such as **Web**, and click **OK**. Save the document and try again.

"Only Word documents (.docx) can be imported." The file isn't the right kind. Open it in Word, choose **File**, **Save As**, pick **Word Document (.docx)** as the type, and import the new copy.

"Your document could not be converted." Word may have saved it oddly, or it's damaged. Open it in Word and save it again as a **Word Document (.docx)**, then import the new copy.

"A security risk has been found with the file you are trying to upload." The virus check stopped the file. Don't open it again; ask whoever looks after your computers to check it.

Visitors get "page not found". Check that **Visitor** is still chosen in **Visible To (Roles)** (see Step 3), that the address you typed matches the page's **Slug**, and that you clicked **Publish**, not just **Save**. After changing **Visible To (Roles)**, click **Update**, then **Publish**.

The page looks wrong on the website. Open the page again, fix it in **Page Content**, click **Update**, then **Publish**. Or fix the Word document and import it again.

You navigate away and a message asks about unsaved changes. You haven't saved since your last change. Stay on the page and click **Save** (or **Update**) first, unless you meant to throw the changes away.

Designing your site

The rest of this guide says how each part of the tenant app works. This module is about how to use them well: a few ideas that keep a site looking consistent, easy to change and easy for everyone to use. Read it before you build your first pages, and share it with anyone who builds them with you.

The look comes from the site's styling

Your site's colours, fonts and spacing are set once, in its styling: the **Custom Styles** on Site Styling, or a theme you've installed (see *Site styling and themes*). Pages and blocks then use that styling rather than carrying colours of their own. Change the styling and every page follows.

This matters more than it first seems:

- **One change reaches everything.** A new brand colour is one edit, not a hunt through every page.
- **Light and dark.** A site's styling can have a dark version, which visitors see when their device is set to dark. A colour fixed on a single block wouldn't change with it, and could leave its text unreadable. Colours from the styling change together.
- **Themes keep working.** A theme you install or update replaces the styling. Pages that use it take the new look; anything fixed by hand wouldn't.

So when a block should look different, such as a coloured band or a card with a border, give it a **CSS Class** your styling defines (see *The page designer*), rather than trying to colour it on the spot. If the class you need doesn't exist yet, that's a job for whoever writes your styling: see *Styling your site: notes for designers*.

Build from blocks, and reuse them

A block is a piece of content you can place on as many pages as you like: a call to action, a row of service cards, a contact panel. Making something a block, rather than writing it into one page, means it looks the same everywhere it appears.

- **Start from the block library** when you can (see *Blocks*). Its blocks already take on your site's colours and fonts, and work on a phone.
- **Name and describe every block** so someone else can find it in the designer's list in a year's time. "CTA: Request a quote" and "The call to action band at the foot of most pages" say more than "Block 7".
- **Changing a block doesn't change the pages it's already on.** Placing a block copies it as it is at that moment, so you can improve a block without disturbing pages you've finished. When you do want a page to take the new version, use **Reset Content** on it in the designer. Decide which pages should follow, and update them on purpose.

Pages, templates and blocks

Use a…	When
Block	The same piece of content appears on more than one page.
Template	You'll make many pages of the same kind, such as articles, services or case studies. Each new page starts as a copy of the template, so they

Use a…	When
	share a layout.
Page	Everything else: one page with its own content, built from blocks in the designer.

A **Template List** block can then list every page made from a template, such as the latest articles, and keeps itself up to date as you add them.

The header and footer

The header and footer on every page are blocks too: a Site Header and a Site Footer block, which you choose on **Visitor Content** (see *Menus, header and footer*). Their links come from your menus, so to add a page to the header, add it to the menu rather than editing the header. You can prepare a new header or footer, check it, and only then choose it, without the site changing in the meantime.

Write for the people reading

- **Headings in order.** Use headings to give a page its outline: one main heading, then sections under it. Screen readers and search engines both read the outline.
- **Links that say where they go.** “Request a quote” tells a visitor what happens; “click here” doesn’t, and makes no sense read on its own.
- **Describe every picture.** A picture’s description is read out to people who can’t see it, and is shown when it can’t load. Say what it shows and why it’s there, in a sentence (see *Media*).
- **Give each page a meta description.** It’s the sentence under your page’s title in search results, so write it for the person deciding whether to click.
- **Keep page addresses short and lasting.** Other sites, emails and bookmarks link to them. If you must change one, add a redirect from the old address (see *Redirects*).
- **Ask only what you need on a form.** Every extra question loses some visitors. Keep **Require CAPTCHA** on for a form anyone can send, unless you have a reason not to (see *Forms*).

Check what visitors will see

Before you publish, look at the page the way visitors will:

- **On a phone.** Most visitors are. The preview’s phone and tablet buttons show each size, and a layout that works on a computer often needs a second look on a phone.
- **Light and dark.** If your site has a dark version, use the half circle, sun and moon above the designer to see both (see *The page designer*).
- **Before it’s live.** Saving keeps a draft; nothing changes on the site until you publish. If your organisation approves content first, the approval is a second pair of eyes (see *Approvals and version history*).

Working with a designer or agency

You may want someone else to design your site, or to build part of it. They can work in your tenant app like any other user:

- **Give them their own login** under **Users**, with the permissions the work needs, and remove it when the work is done (see *Users and permissions*). Never share your own.

- **Their styling goes in Custom Styles** and in the blocks they make. *Styling your site: notes for designers*, at the end of this guide, is written for them: how the styling is organised, the colours it's built on, and how to give the site a dark version.
- **Export your content first** before a big change, so you can go back (see *Export and import*).

Themes and Theme Builder

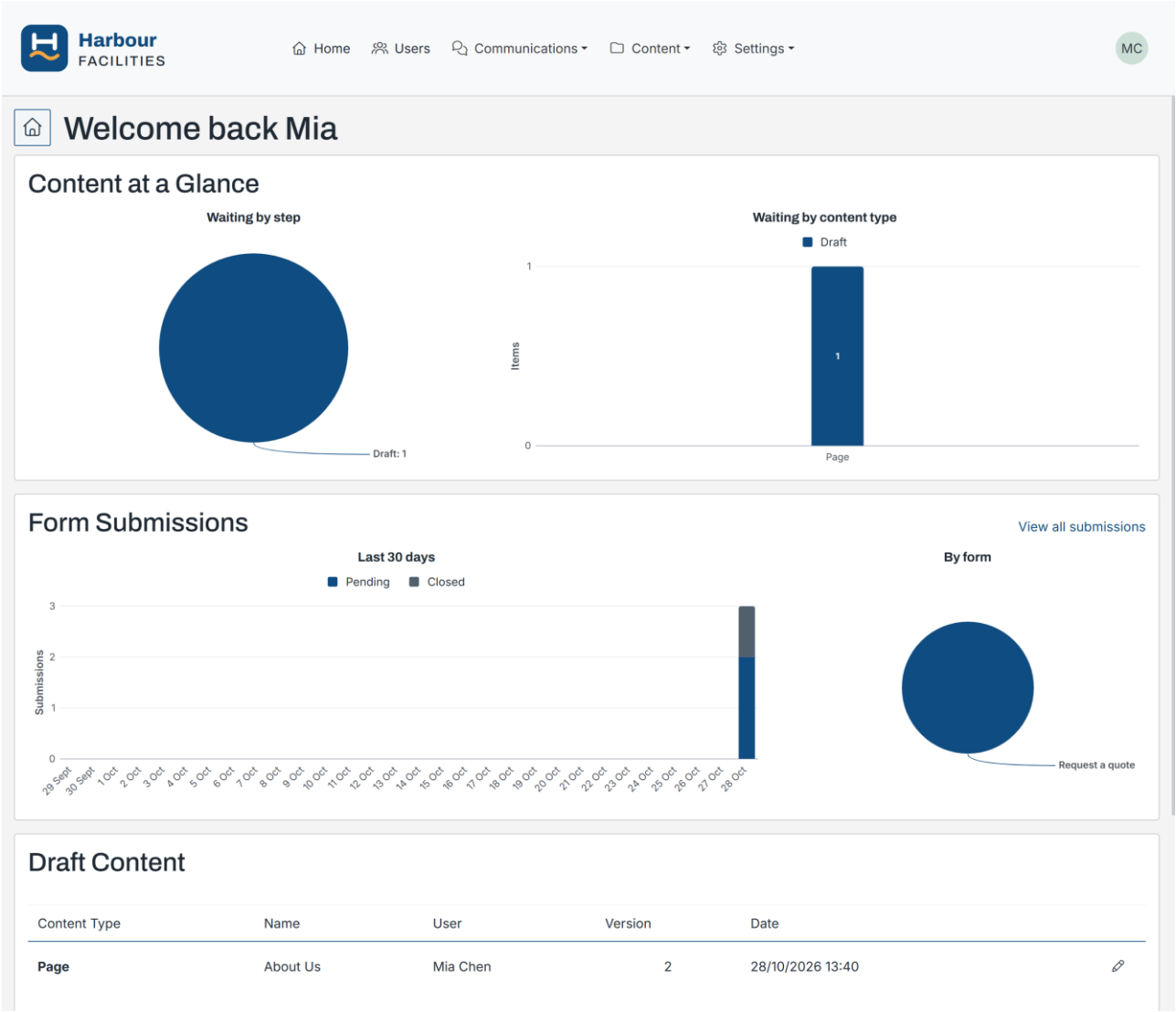
A theme is a complete starting point: styling, fonts, blocks, templates, sample pages and a header and footer, which you install from **Settings** › **Themes** (see *Site styling and themes*). Installing one copies it into your site: your own pages are never replaced, and your own styling still has the last word.

Themes are made in **Theme Builder**, which anyone can use in a web browser, with nothing to install. It's described on the chx4 web website, and has its own guide for designers. A designer who makes your site's look there can also submit it as a theme, and once it's reviewed and approved, any chx4 web site can install it. Reviewers check that a theme is accessible, works at every screen size and holds nothing copyrighted. They don't judge taste.

Before submitting, a designer can try a theme on a site: Theme Builder downloads the theme as a package, and uploading it on **Import Content** opens the theme's install wizard, which adds the theme and deletes nothing.

Home

Home is the first page you see after you log in. It shows how much content is waiting to be finished, and what visitors have sent in through your forms, so you can see at a glance what needs your attention.



Home

The page greets you by name, then shows a panel for each of these.

Content at a Glance

Two charts count the content that is waiting for someone to act on it:

- **Waiting by step** shows how many items are at each step.
- **Waiting by content type** shows the same items by type (pages, blocks, forms, templates, menus and panels), split by step.

When nothing is waiting, both charts say **No content is waiting**.

Form Submissions

This panel covers the last 30 days of what visitors have sent through your forms.

- **Last 30 days** shows how many submissions arrived each day, coloured by status, such as **Pending** and **Closed**.
- **By form** shows which of your forms they came through.

If no one has submitted a form in that time, the panel says so instead. Click **View all submissions** to open the full list under **Communications** › **Form Submissions**.

Draft Content

> **Who can do this:** this panel is shown to people with the **Add / Edit Content** permission.

Draft Content lists every page, block, form, template, menu and panel with changes that haven't been published. A change sent for approval moves to **Pending Approval** and isn't listed here too. For each it shows the **Content Type**, **Name**, the **User** who made the changes, the **Version** and the **Date**. Click a column heading to sort by it.

To carry on with a draft, click the pencil, or double-click its row. It opens in the editor for that type of content. When there are no unpublished changes, the panel says **No draft content.**

Pending Approval, and Approved

If your site has **approval** turned on for content changes, Home has two more panels, and the charts above count their items too:

- **Pending Approval** lists changes waiting for someone to approve them. You see it if you have the **Approve Content** permission.
- **Approved, Ready to Publish or Archive** lists approved changes waiting to go live. You see it if you have the **Publish Content** permission.

They work like **Draft Content**: click the pencil, or double-click a row, to open the item. See *Approvals and version history* for how content moves through these steps.

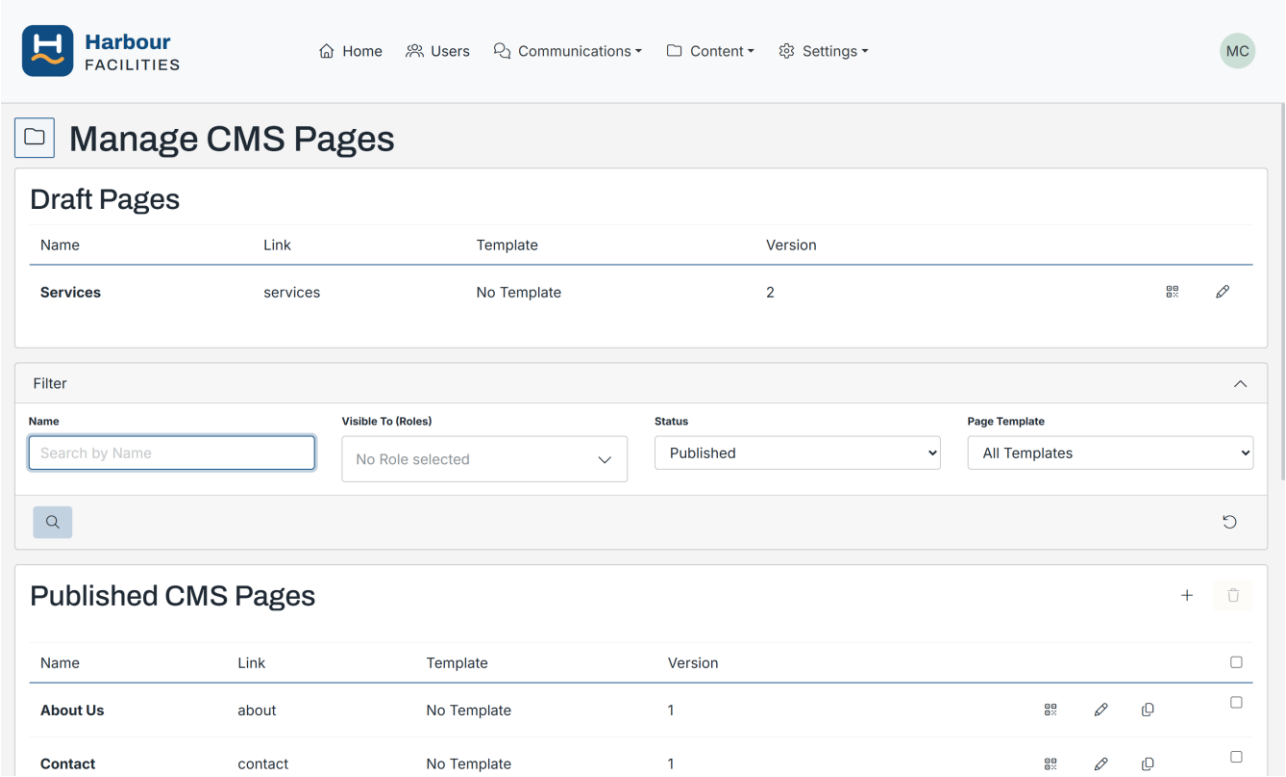
A message for your team

Someone with the **Add / Edit Content** permission can put a message of their own on Home, under the greeting: a welcome, a notice or a reminder. It's the **Home** panel under **Content** › **Tenant Content**, and it only appears once it has been published. See *The tenant app's own content*.

CMS Pages

Every page of your site is a CMS page: its address, its title and description for search engines, and its content, laid out in the page designer. **CMS Pages** lists them all.

> **Who can do this:** you need the **Add / Edit Content** permission. Archiving pages also needs **Archive Content**. Find pages under **Content** › **CMS Pages**.



The CMS Pages list

Find a page

The list shows each page's **Name**, its **Link** (the address after your domain), the **Template** it's built on and its **Version**. Click a column heading to sort by it.

To look for a page, open **Filter**, then:

- Type part of its name in **Name**.
- Choose who it's for in **Visible To (Roles)**.
- Choose **Published** or **Archived** in **Status**.
- Choose a **Page Template**.

Then click the magnifying glass. The arrow beside it clears the filter.

When a page has changes that haven't been published yet, it's also listed under **Draft Pages** at the top.

Open a page

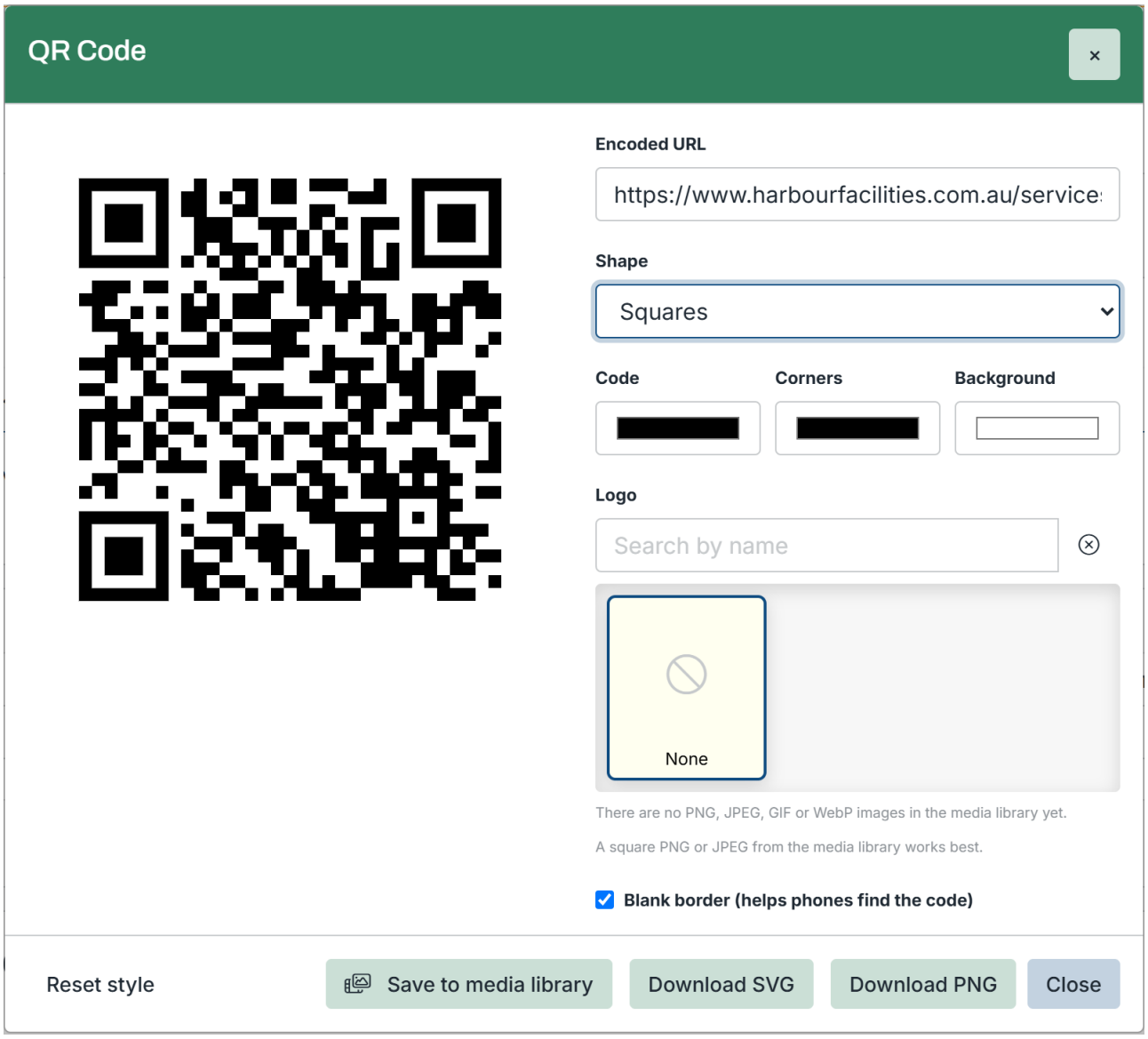
Click the pencil on a page, or double-click its row, to open it in the page designer.

Copy a page

The button with two sheets of paper (**Copy as new CMS Page**) opens a new page in the designer with the content of this one, a quick start for a page that's similar.

Make a QR code for a page

The QR code button shows a QR code for the page's address, to print on a flyer or a sign.



The QR code dialog

The code is redrawn as you change the settings on the right:

- **Encoded URL** is the address the code opens. It starts as the page's address, and you can change it, for example to add a campaign tag.
- **Shape** is **Squares**, or **Dots, with rounded corners**.
- **Code**, **Corners** and **Background** set the colours of the dots, of the three large corner squares, and of the background. Keep plenty of contrast between the code and the background, or phones may not read it.

- **Logo** puts a picture from your media library in the middle. Search by name, then click a picture, or **None** for no logo. A square PNG or JPEG works best, and a logo has to be small in file size to be listed. Once you've chosen one, **Logo size** sets how much of the code it covers.
- **Blank border** leaves a margin around the code, which helps phones find it. Leave it ticked.

Reset style puts every setting back to how it started. When the code looks right:

- **Download SVG** saves it for print or for resizing without losing sharpness.
- **Download PNG** saves it as a picture.
- **Save to media library** adds it to **Media**, ready to use on other pages.

Click **Close** when you're done.

Add a page

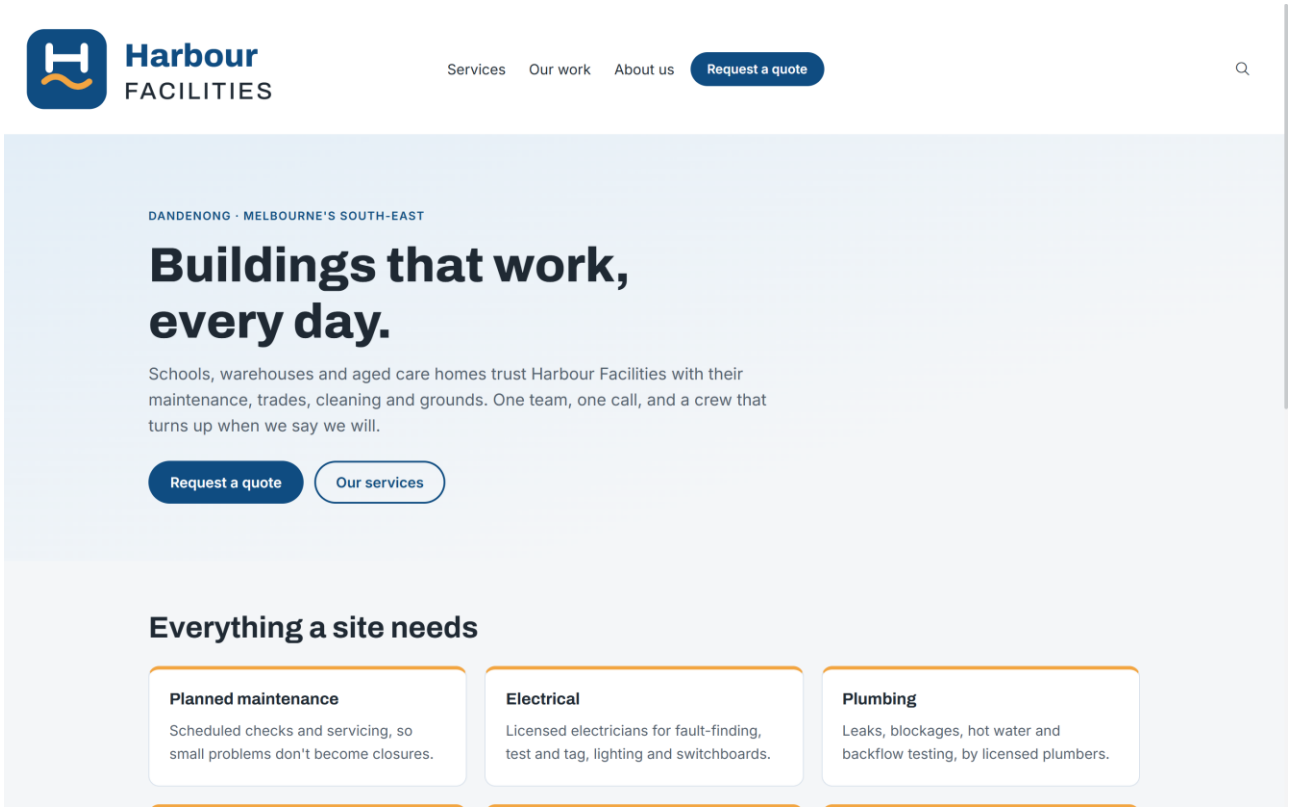
Click **+** (**Add CMS Page**) and lay the page out in the designer. See *The page designer*.

Archive pages

Tick the pages you no longer want and click the bin (**Archive Selected CMS Pages**). Archived pages leave the site but aren't deleted: choose **Archived** in the filter's **Status** to find them again.

> **Note:** when your organisation approves content before it's published, pages are archived through that approval instead, and the bin isn't shown.

How visitors see it

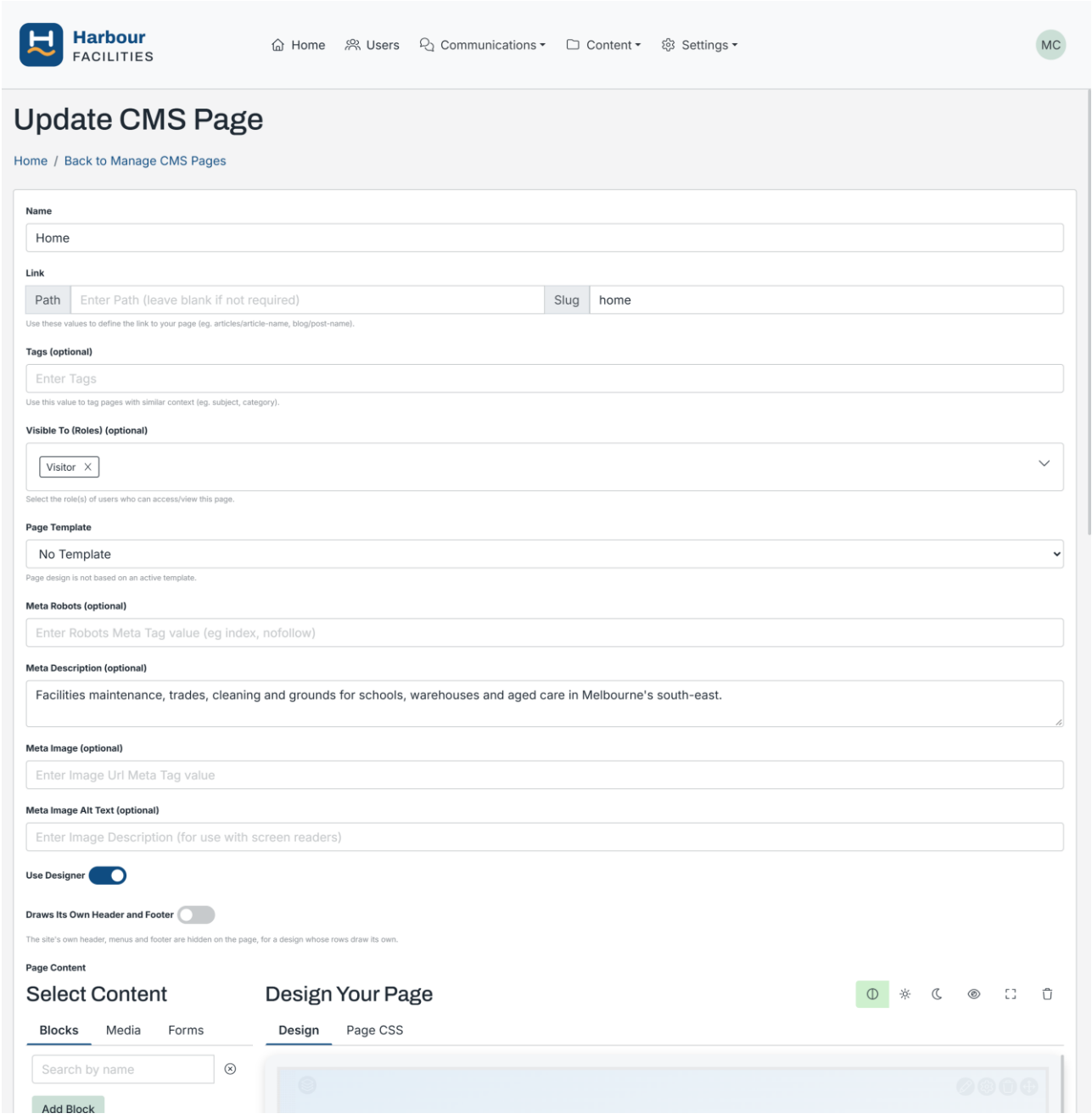


The same site as visitors see it

The page designer

The page designer is where you lay out a page: you drag blocks, pictures and forms onto a canvas, in rows, and set how each one looks. It opens when you add a page, copy one, or open one from **CMS Pages**. Templates use the same designer, so this module applies to them too.

> **Who can do this:** you need the **Add / Edit Content** permission to change a page.



A page open in the designer

The page's details

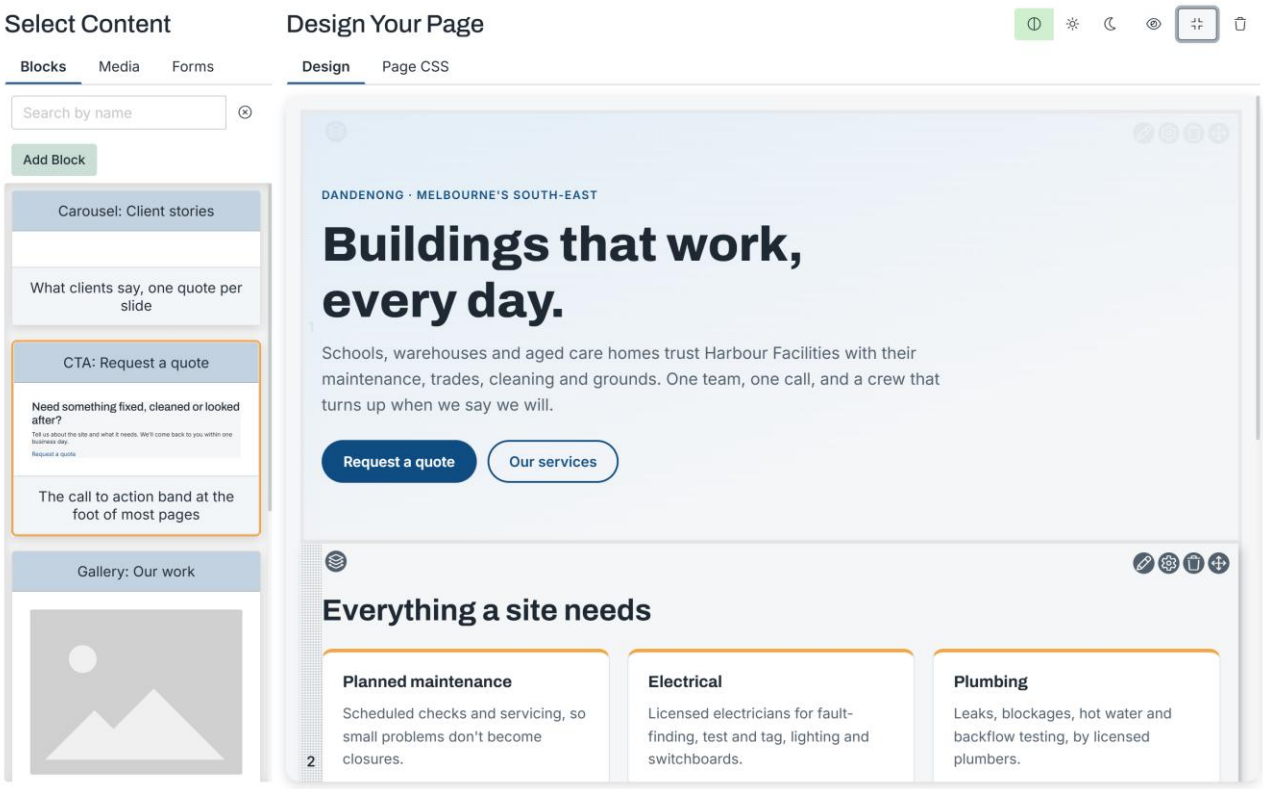
Above the designer are the details of the page itself:

- **Name** is how the page appears in your lists.

- **Link** is the page's address, in two parts. **Path** is optional and puts the page in a folder (for example `articles`). **Slug** is the last part (for example `article-name`). Once a page is published, other sites, emails and bookmarks link to its address, and nothing redirects them for you: if you change it, add a redirect from the old one (see *Redirects*).
- **Tags** are optional words that group similar pages, such as a subject or category.
- **Visible To (Roles)** limits who can see the page.
- **Page Template** builds the page on a template, or **No Template**. The line beneath says which version of the template the page is using.
- **Meta Robots**, **Meta Description**, **Meta Image** and **Meta Image Alt Text** are what search engines and link previews read. The description is the sentence shown under your page's title in search results. **Meta Image** is the address of the picture shown when the page is shared, and its alt text describes that picture for screen readers.
- **Use Designer** switches between the designer and a plain text editor for the whole page. The designer is the usual choice, and a new page or template starts with it on.
- **Draws Its Own Header and Footer** hides the site's header, menus and footer on this page, for a page such as a landing page that wants none.

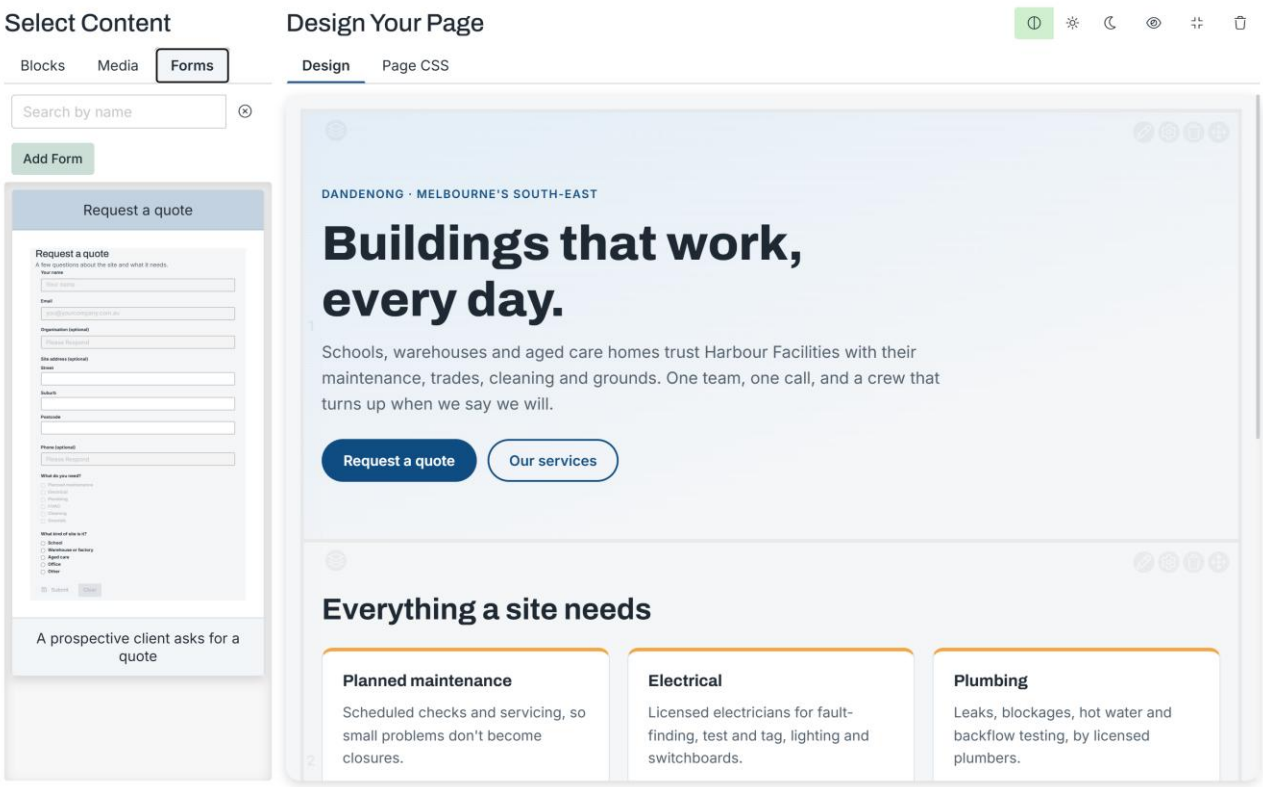
Page overview

The designer has two halves.



The designer in full screen

Select Content, on the left, lists what you can put on the page, in three tabs: **Blocks**, **Media** and **Forms**. Each block and form is a card with its name, a small picture of how it will look on your page, and its description. A block whose pictures are chosen when you place it, such as a gallery, shows a placeholder picture until then. Type in **Search by name** (two letters or more) to narrow a list. Each tab has a button for making something new without leaving the page: **Add Block**, **Upload Files** or **Add Form**.



The Forms tab, with a preview of each form

Design Your Page, on the right, is the canvas. Your page is built in numbered rows. Point at a row to see its tools:

Tool	What it does
The number on the left of a row	Drag it to move the row, or press **Alt** and the up or down arrow.
Layers icon	**Set canvas and layout properties**: the row's settings.
Four-arrows icon on a block	Drag to move the block.
Cog	**Set content properties**: the block's settings.
Pencil	**Edit content**. You can also double-click a block.
Bin	Remove the block or form from the page.
Left-right arrow	**Resize this panel**, for a block that shares a row with others.

The buttons above the canvas are:

- **Half circle**, **sun** and **moon**, when your site has a dark version as well as a light one: the canvas and the preview show your site as this device is set, in its light version or in its dark version. Each block's editor opens in the same one.
- The **eye**, to preview the page, and the **puzzle piece** to come back to designing.
- **Phone**, **tablet** and **computer** icons, shown while you preview, to see the layout at each size.
- **Expand**, to give the designer the whole screen, and **Compress** to come back.
- The **bin**, to delete everything on the page. It asks you to confirm first.

Add a block, a picture or a form

1. Choose the **Blocks**, **Media** or **Forms** tab.
2. Drag an item onto the canvas. A marker shows where it will land:
    - above or below a row, to put it in a new row;
    - beside a block, to put the two side by side in one row;
    - above or below a block that is already in a row with others, to stack them in that column.

A new page starts with a box that says **Drop your first block here**.

A block is a reusable piece of content, written once and used on many pages. See *Blocks*. A form dropped on the page shows a working copy of itself, and what visitors send is collected under **Communications** › **Form Submissions**.

> **Tip:** to swap a picture inside a block for another, drag a picture from the **Media** tab onto it. In the **Media** tab, click a picture to copy its address, or its caption to copy its description.

Change a block's content

Double-click the block, or click its pencil. The editor opens beneath the canvas. Close it with **Close**, or the **x** at its top.

- A **Generic HTML** block opens in the text editor.
- A **Rich Text** block is edited in place on the canvas.
- Galleries, carousels and horizontal scrollers open their own editors, where you add, arrange and describe their pictures. See *Galleries, carousels and scrollers*.

Reset Content puts the block back to how it was when you added it.

Bring in a Word document

A block that opens in the text editor can take its content from a Word document, so you can lay a page out in the designer and still write the words in Word.

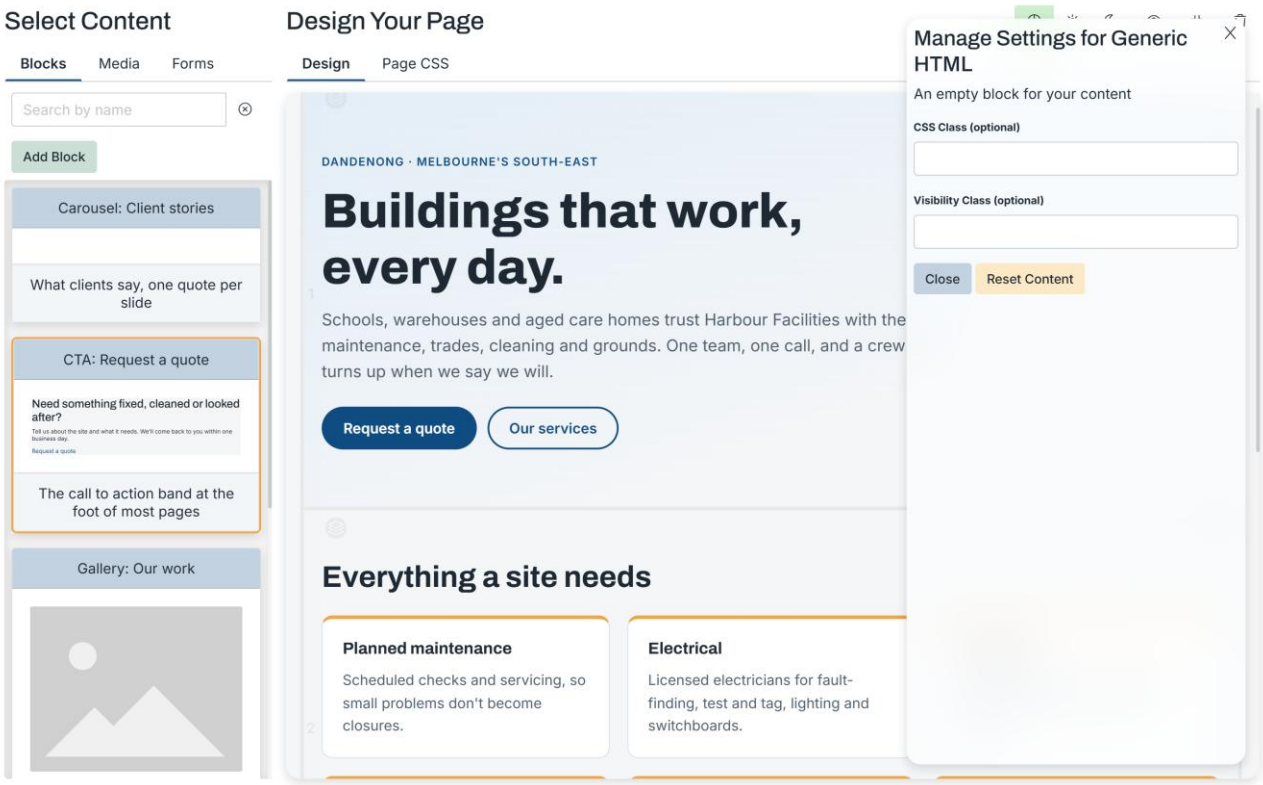
1. Open the block's editor as above.
2. Click **Import Word Document** on the editor's toolbar (a small **W** with an arrow, after the picture and video buttons), choose the document, and click **Open**.
3. When **Your document has been converted** appears, the document is in the block.

The document **replaces everything in that block**, and only in this block on this page: the block in your Block Library isn't changed. Word's fonts and colours are left behind, so the words take on your site's styling. *Your first page, step by step* lists what comes across from Word and what doesn't.

> **Note:** a block you've placed on a page is a copy that keeps the version it had when you added it. Changing the original block later doesn't change this page.

Change how a block looks

Click the cog to open **Manage Settings** for the block. The panel names the block and says what it's for, then offers:



A block's settings

- **CSS Class**, to give the block a look your site's styling provides, such as a coloured band. Colours come from your site's styling rather than being picked per block, so they follow the site's light and dark versions and any theme you install.
- **Visibility Class**, a class that is added when the block scrolls into view, for an animation. See *Animate a block as it scrolls into view* below.
- Any other settings the block has of its own, such as which menu a **Menu** block shows.

For a form, the settings are **Redirect** (where visitors go after sending it), **Submit Button Text** and **Clear Button Text**, then **CSS Class** and **Visibility Class**.

Click **Close** to keep your changes. **Reset Content** puts a block back to its original state.

Animate a block as it scrolls into view

A block's or form's **Visibility Class** makes it animate when a visitor scrolls to it, for example by fading in or sliding up. Your site doesn't come with any animations. You write them as CSS classes in **Custom Styles** (see *Site styling and themes*) or on the designer's **Page CSS** tab, then name them in the block's settings.

On your site:

- The block starts without its Visibility Class. Once a quarter of the block is on screen, the class is added, and it stays. Scrolling away and back again doesn't play the animation a second time. A block too tall to ever show a quarter of itself gets its class when it reaches the middle of the screen.
- A block that is already on screen when the page opens gets its class straight away.
- **Visibility Class** can name more than one class, separated by spaces, such as `in-view slow`.
- Rows don't have a Visibility Class. Give one to each block in the row instead.

On the designer's canvas, a block always has its Visibility Class, so you see it the way it looks after it has arrived, and nothing is hidden while you edit. To watch the animation, preview the page with the eye and scroll.

Write the animation

Give the block two classes. Its **CSS Class** sets how it looks before it arrives, and its **Visibility Class** sets how it looks after. A CSS `transition` moves it from one to the other.

For example, put this in **Custom Styles**:

```
.reveal {
    opacity: 0;
    transform: translateY(2rem);
    transition: opacity 0.6s ease-out, transform 0.6s ease-out;
}

.reveal.in-view {
    opacity: 1;
    transform: none;
}

@media (prefers-reduced-motion: reduce) {
    .reveal {
        transform: none;
        transition: none;
    }
}
```

Then set the block's **CSS Class** to `reveal` and its **Visibility Class** to `in-view`. The block waits out of sight, a little below its place, and fades up into place as it scrolls into view. The last part of the CSS leaves out the movement for visitors who have asked their device for less motion.

> **Tip:** put the starting look in the CSS Class, not in the Visibility Class. An animation written only in the Visibility Class, such as a `@keyframes` fade in from nothing, leaves the block showing until it scrolls into view. Then it disappears and fades back in.

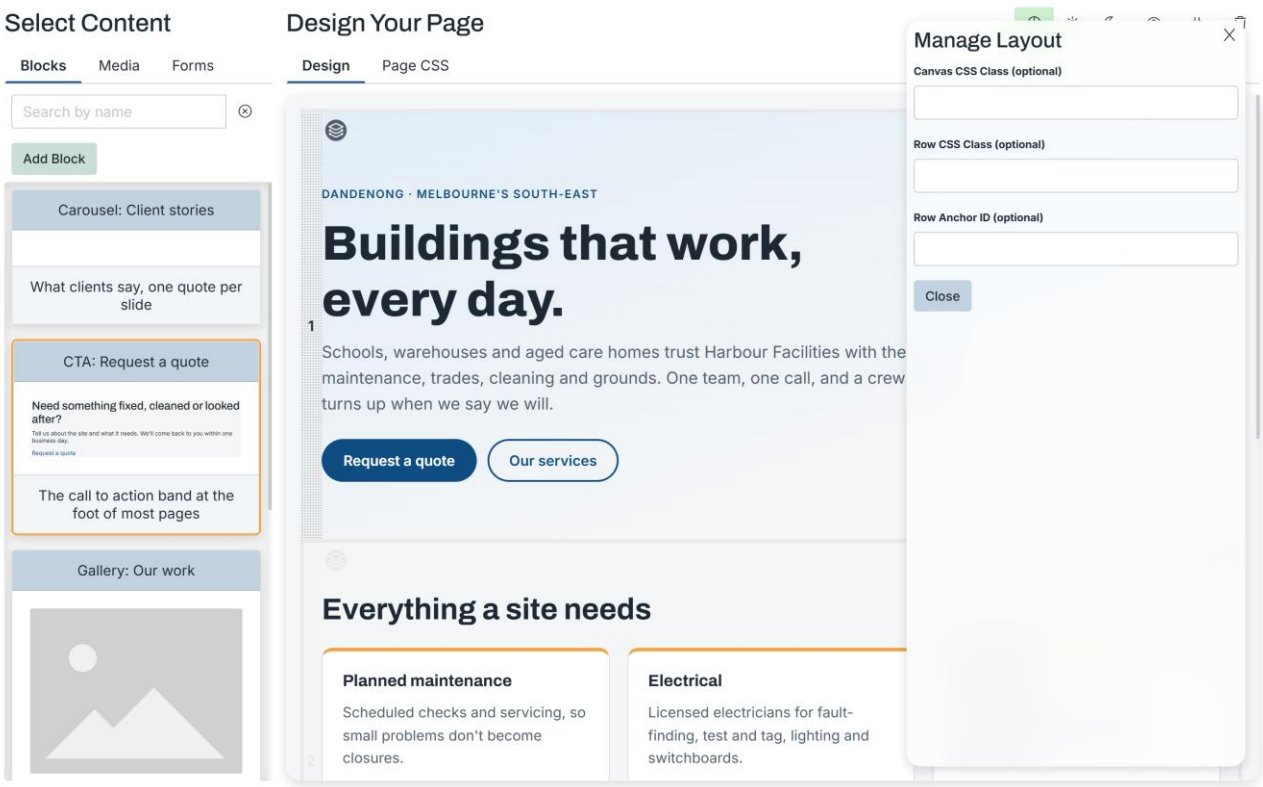
In HTML you write yourself

In an **HTML** block you can put the same effect on any element inside the block, and two more effects are available:

- `data-visibility="in-view"` works like **Visibility Class**: the classes it names are added once, when the element arrives in the same way. Unlike a block's Visibility Class, this also happens on the designer's canvas.
- `data-transition="0.5"` marks the element every time it comes into view and every time it leaves. It has `data-transition-in` while it's on screen and `data-transition-out` once it has left. The number is how much of the element must be on screen, from `0` to `1`. Anything else counts as `0.5`. An element too tall to show that much is marked in while it reaches the middle of the screen. Use it for an effect that plays again each time, styled with selectors such as `.photo[data-transition-in]` and `.photo[data-transition-out]`.
- The page has a `--scroll` CSS variable that runs from `0` at the top of the page to `1` at the bottom as the visitor scrolls. For example, `transform: scaleX(var(--scroll))` makes a bar that fills as the page is read.

Change a row

Click the layers icon on a row to open **Manage Layout**.



A row's layout settings

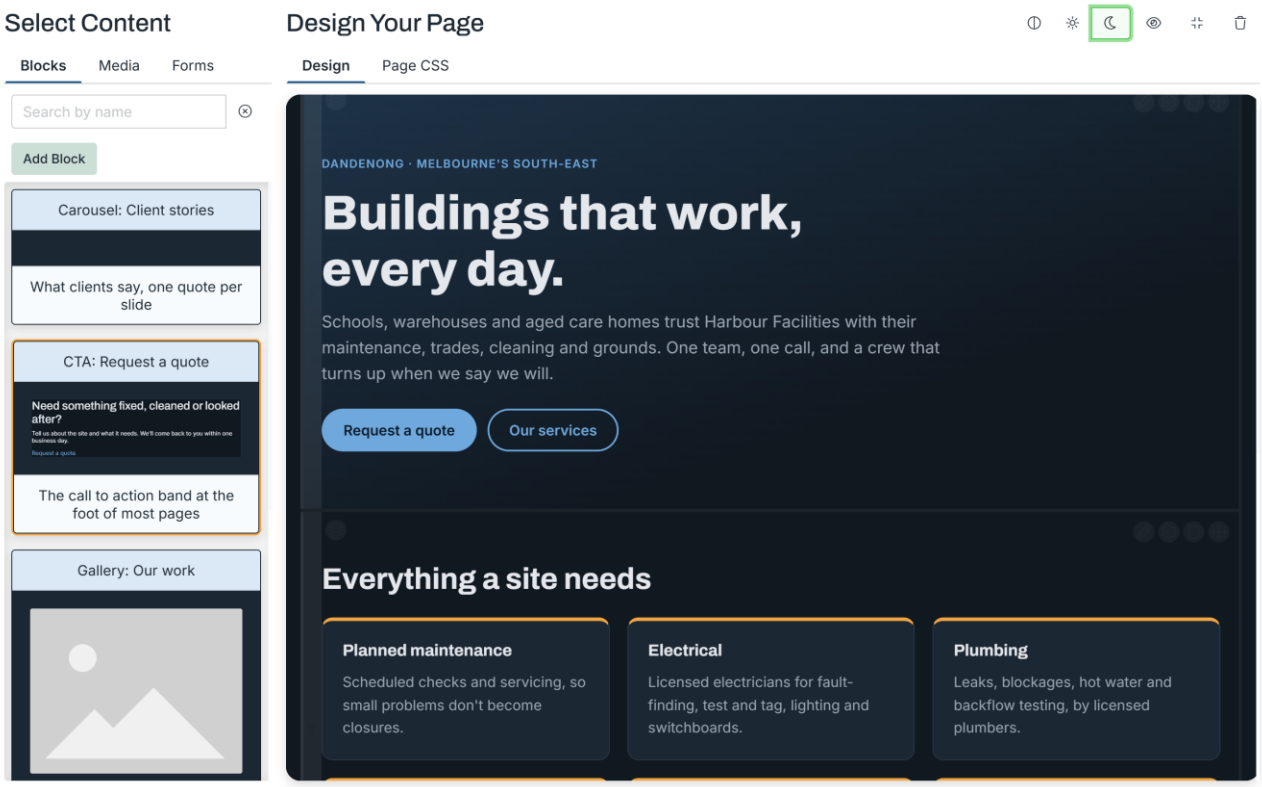
- **Canvas CSS Class** styles the full width band behind the row, for a coloured stripe.
- **Row CSS Class** styles the row's content.
- **Row Anchor ID** gives the row a name that a link can jump to, as in `#contact`.
- For a row with columns, **Column 1 CSS Class**, **Column 2 CSS Class** and so on style each column.

> **Tip:** `cms-page-width` in **Row CSS Class** gives the row the same width as your site's plain pages (those made without the designer), whatever your site's styling sets that to.

To change the width of a column, click the left-right arrow on its block. It switches between equal width and twice as wide as its neighbours.

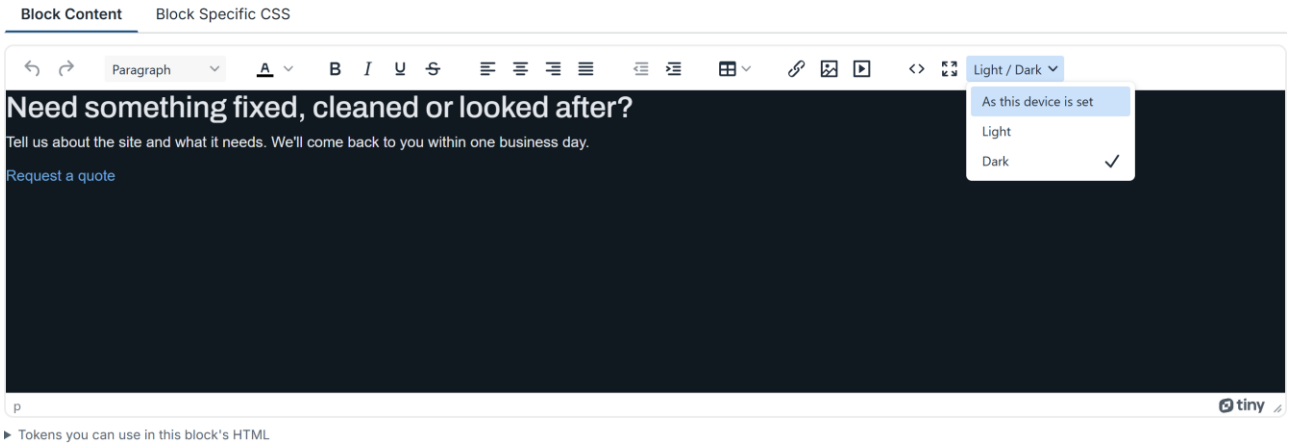
See the content light and dark

When your site has a dark version, its visitors see the one their device is set to. The half circle, sun and moon above the canvas show the whole page in either: the canvas, the preview and every editor you open.



The canvas in the site's dark version

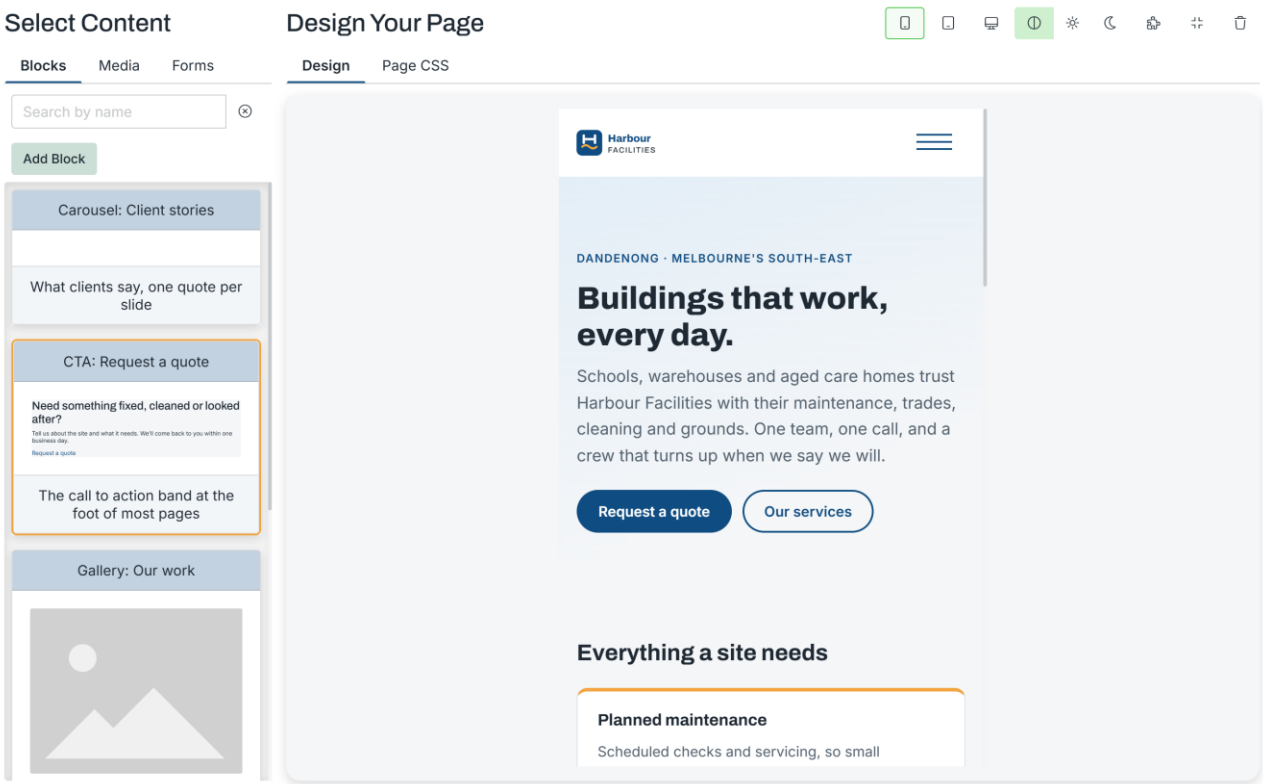
To check a block in both while you write it, use **Light / Dark** in the editor's toolbar: **As this device is set**, **Light** or **Dark**. It changes only that editor, not the canvas, and the editor opens again in whatever the sun and moon above the canvas are set to. The same choice is in the editor on a block's own page.



An editor switched to dark, with its Light / Dark choices

Preview the page

Click the eye to see the page as visitors will, and the phone, tablet and computer icons to try each size. A layout that looks good on a computer can need a second look on a phone.



The page previewed at phone width

Click the puzzle piece to return to the designer.

Page-specific CSS

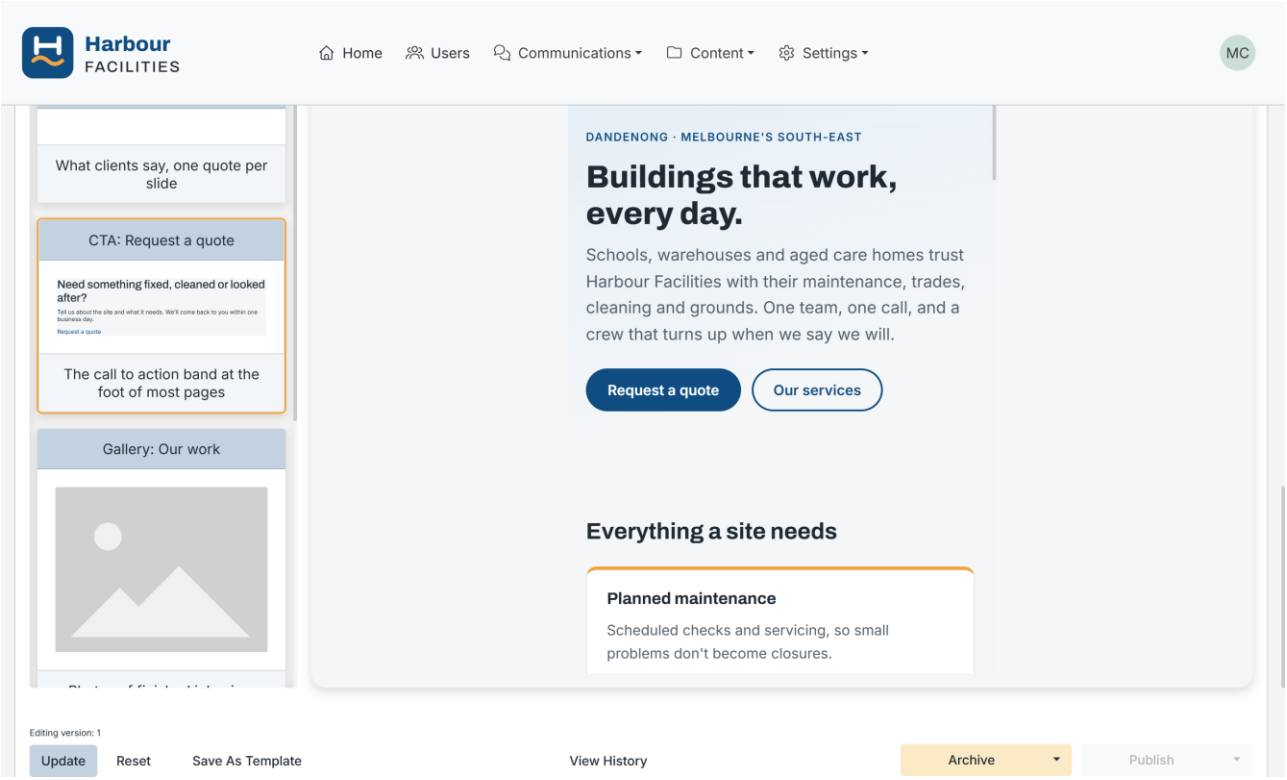
The designer has tabs above the canvas: **Design**, **Page CSS** (**Template CSS** for a template) and, if your administrator has turned page scripts on, **JavaScript**. The tabs are there in full screen too.

Page CSS adds styling that applies to this page alone. Click back to **Design** to see what a change did: the canvas and the preview both use it, and nothing is lost when you switch tabs. **Format** tidies it.

A script on the **JavaScript** tab runs on the published site and in the preview, not on the designer's canvas.

Save, submit and publish

The buttons at the foot of the page decide what happens to your changes.



The buttons at the foot of a page

- **Update** saves your changes as a draft. Visitors don’t see them yet.
- **Reset** puts the page back to how it was when you opened it.
- **Save As Template** turns the page into a template that other pages can be built on. It is available once your changes have been saved.
- **Publish** makes the saved version live. Its arrow offers **Schedule Publish**, to choose a date and time instead.
- **Archive** takes the page off the site. Its arrow offers **Schedule Archive**.
- **View History** shows the earlier versions of the page. It appears once the page has more than one version.
- **Editing version** says which version you’re working on.

When your organisation approves content before it goes live, the buttons change: **Submit for Approval** sends the page to someone with the **Approve Content** permission, **Approve Content** is what that person clicks, and **Withdraw Request** takes it back. See *Approvals and version history*.

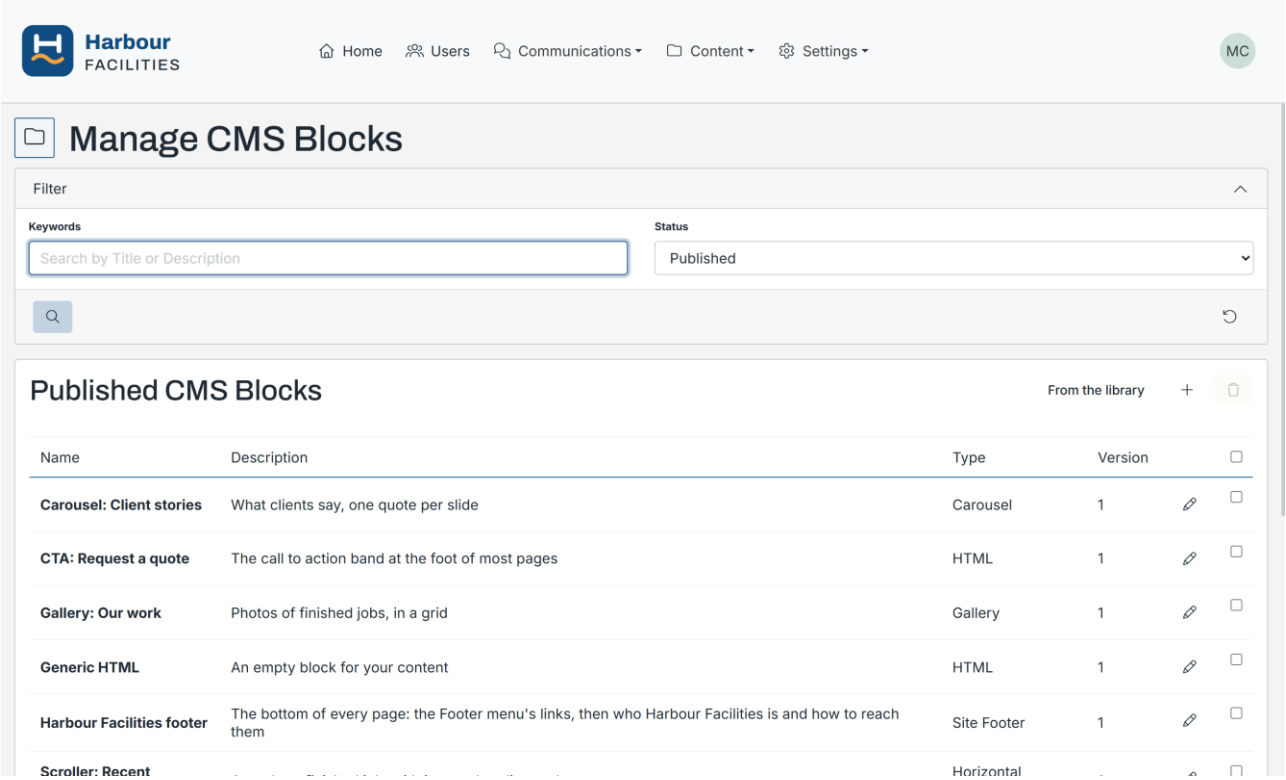
When a page has a draft, a round button at the corner of the screen opens the draft on your site in a new tab, as a visitor would see it.

A page you’ve archived opens read-only, with a note telling you so.

CMS Blocks

A block is a reusable piece of content: a call to action, a row of service cards, a menu, a gallery. You write it once, then place it on as many pages and templates as you like in the page designer. **CMS Blocks** is where you make and look after them.

> **Who can do this:** you need the **Add / Edit Content** permission. Archiving or deleting blocks also needs **Archive Content**, and publishing them needs **Publish Content**. Find blocks under **Content › CMS Blocks**.



The CMS Blocks list

Find a block

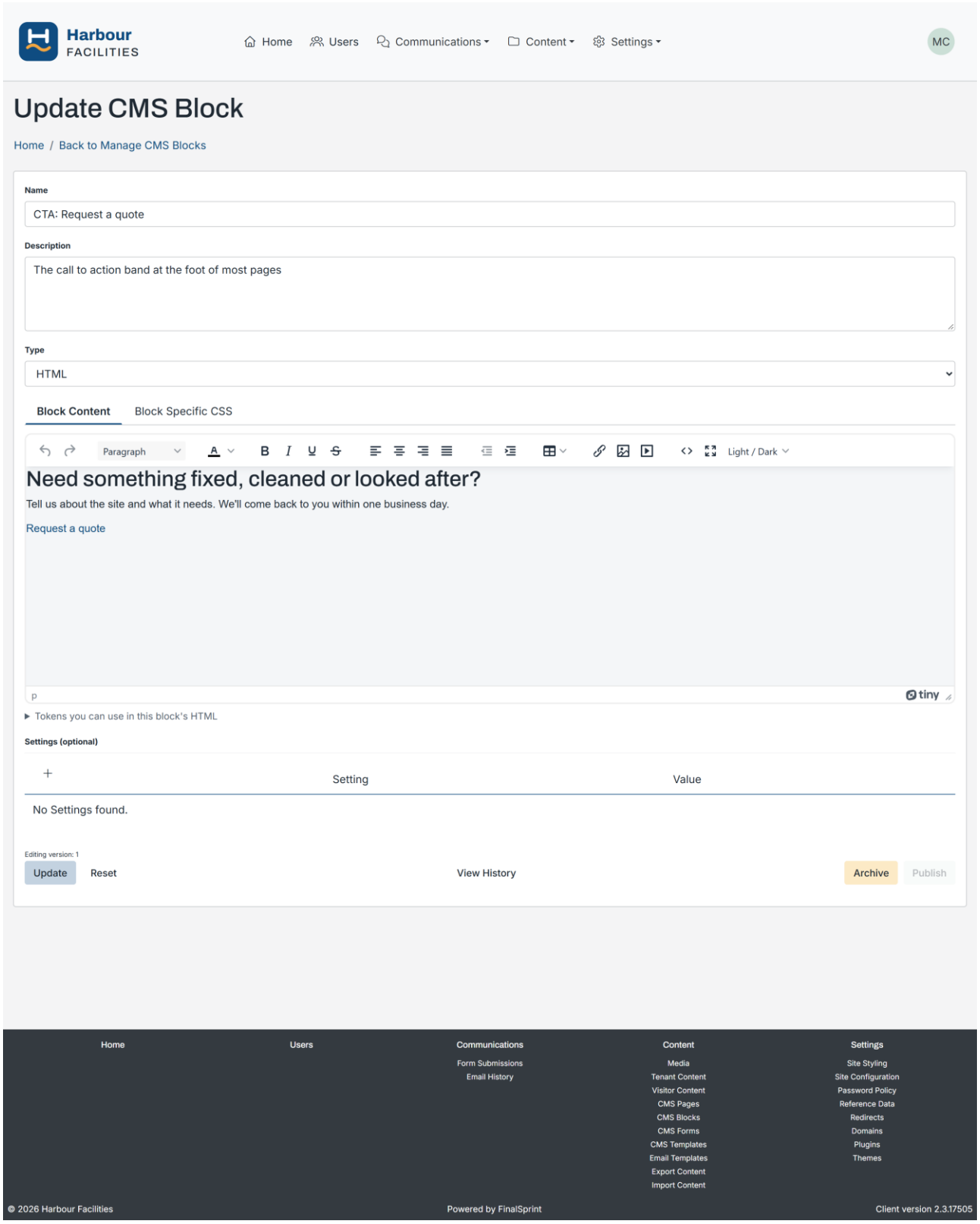
The list shows each block's **Title**, **Description**, **Type** and **Version**. Click a column heading to sort by it.

To look for a block, open **Filter**, type part of its title or description in **Keywords**, or choose **Published** or **Archived** in **Status**, then click the magnifying glass. The arrow beside it clears the filter.

When a block has changes that haven't been published yet, it's also listed under **Draft CMS Blocks** at the top.

Open a block

Click the pencil on a block, or double-click its row.



A block open for editing

Add a block

Click **+** on the list. A new, empty block opens.

1. Give the block a **Name** and a **Description**. Both are shown in the page designer's list of blocks, so say what the block is for.

2. Choose its **Type** (see below).
3. Write its **Block Content** in the editor. It works like a word processor, with a button for the page's code (**<>**) when you need it.
4. If it needs its own styling, write it on the **Block Specific CSS** tab. Click back to the **Block Content** tab to see what it did: the editor draws the content with it.
5. Click **Save**.

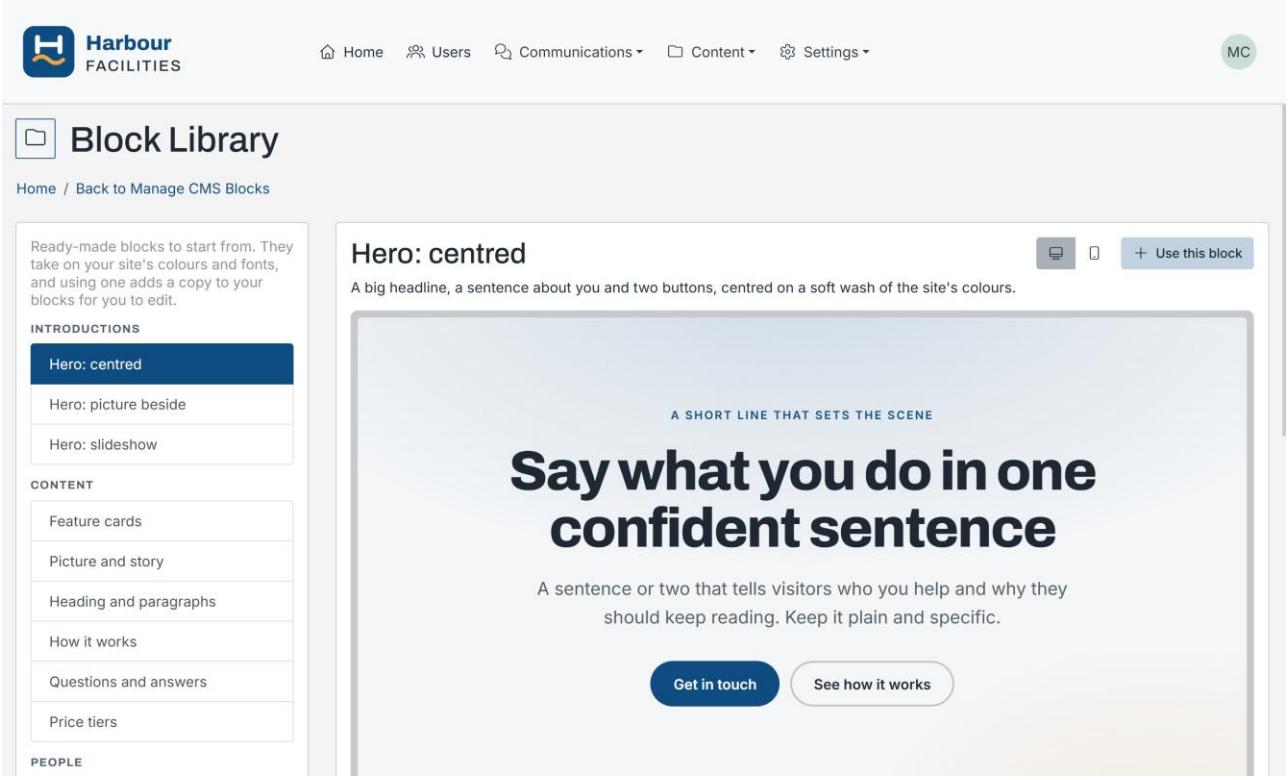
Saving keeps the block as a draft. It joins the page designer's list once you publish it. See *Publish and archive a block* below.

Start from the block library

Rather than start from an empty block, you can start from a ready-made one: a hero, a row of feature cards, price tiers, a team, a call to action and more. They take on your site's colours and fonts.

1. On the list, click **From the library**.
2. Pick a block on the left. The page shows it as it will look, with the computer and phone buttons to try both widths. A gallery, carousel or scroller is shown with stand-in pictures: you choose its pictures where you place it on a page.
3. Click **Use this block**. A new block opens with the library block's name, description, content and CSS filled in.
4. Change whatever you like, then click **Save**.

The library itself never changes: using a block gives you a copy that is yours to edit, and you can use the same library block as often as you like.



The block library

Block types

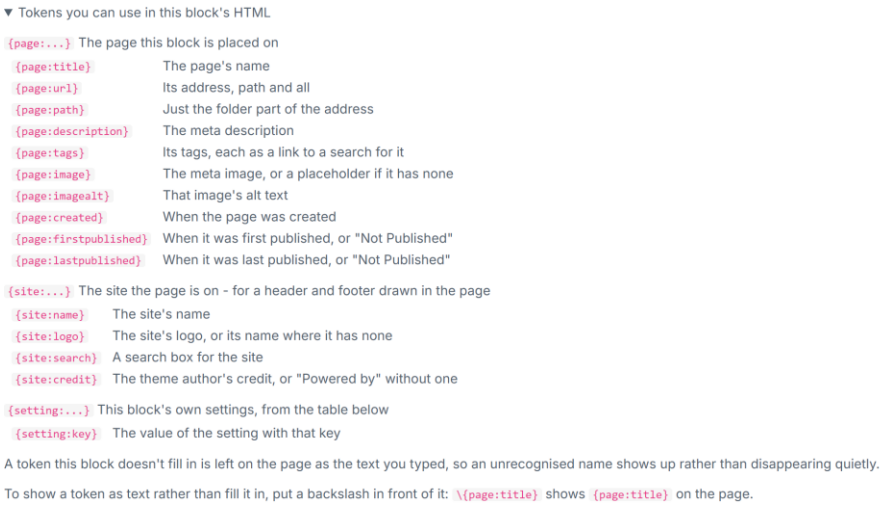
The **Type** decides what the block holds and how the designer treats it.

Type	What it is
HTML	Content you write yourself in the editor. The usual choice.
Rich Text	Text that is edited in place on the page, in the designer.
Form Response	A list of what visitors have submitted through a form, shown on a page. The block's content is repeated for each submission, with the answers filled in.
Template List	A list of the pages made from a template. The block's content is repeated for each page.
Gallery	A grid of pictures from your media library. The block's content is the template for one picture. See *Galleries, carousels and scrollers*.
Carousel	Pictures that slide, one after another, each with words of its own.
Horizontal Scroller	A row of pictures, usually cards, that scrolls sideways.
Menu	One of the site's menus, such as the main menu. It has no content of its own to write: choose the menu under **Settings**, and style it in **Block Specific CSS**.
Site Header and **Site Footer**	The header or footer that appears on every page.

A **Site Header** or **Site Footer** block is different from the others, and isn't placed in the page designer. It is the whole header or footer: its HTML and the CSS that styles it. It places your menus with `{menu:main}` and `{menu:footer}`; to change the links, edit the menu. You can have several of each published, and choose which one the site shows on every page under **Content › Visitor Content › Header and Footer**. The one the site shows can't be archived until you choose another. Below its HTML, the block shows itself as the site will, as last saved, on a computer or a phone, and in the site's light or dark version when it has both; **Preview on the site** opens it on a whole page. See *Menus, header and footer*.

What goes in a block

Block Content can include tokens: placeholders that are filled in with details of the page the block sits on. Open **Tokens you can use in this block's HTML** under the editor to see them.



The tokens a block can use

For example, `{page:title}` shows the title of the page the block is on, so one footer block can name each page it appears under. A token the block doesn't recognise is left on the page as you typed it, so a misspelling shows up rather than vanishing.

To show a token as text instead of filling it in, such as on a page that explains tokens, put a backslash in front of it: `\{page:title}` shows `{page:title}` on the page.

Block Specific CSS styles the block. When you place the block on a page or template, its CSS is copied onto that page, once however many times the block appears. **Format** tidies it.

Settings are named values a block can read, with **+** to add one. Some types have settings of their own and show them already filled in, such as which menu a **Menu** block shows. For your own settings, a block's content reads one with `{setting:key}`.

Publish and archive a block

The buttons at the foot of the page decide what happens to your changes:

- **Update** saves your changes as a draft.
- **Reset** puts the block back to how it was when you opened it.
- **Publish** makes the saved version available in the page designer. It needs **Publish Content**.
- **Archive** takes the block out of the page designer's list. It needs **Archive Content**.
- **View History** lists the block's earlier versions. It appears once there's more than one.

An archived block can be found again by choosing **Archived** in the list's **Status** filter. It opens read-only, with a note saying so.

> **Note:** when your organisation approves content before it's published, **Publish** is replaced by **Submit for Publish Approval**, and **Archive** by **Submit for Archive Approval**. See *Approvals and version history*.

Changing a block that's already on pages

Placing a block on a page copies the block, as it was at that moment, onto the page. Changing the block afterwards **doesn't** change the pages that already use it, so you can improve a block without altering pages you've finished. To bring a page up to date with the changed block, open the page in the designer, click the block's cog, and click **Reset Content**.

Archive blocks

Tick the blocks you no longer want, then click **Archive** (or the bin at the top right of the list) and confirm. An archived block leaves the designer's list, and you can find it again under **Archived**.

> **Note:** when your organisation approves content before it's published, blocks are archived through that approval instead, and the bin isn't shown.

Galleries, carousels and scrollers

Three kinds of block show a set of pictures:

- a **Gallery** lays them out in a grid;
- a **Carousel** shows one at a time, moving on by itself and with arrows;
- a **Horizontal Scroller** shows a row of them, usually as cards, that visitors move along with arrows.

They are built differently from other blocks, and this module explains how, because most surprises with them come from not knowing which part holds what.

> **Who can do this:** you need the **Add / Edit Content** permission to make the blocks and to change a page, and **Publish Content** to publish a block. The pictures come from your media library, so upload them first. See *Media*.



A gallery on the published site

How they're put together

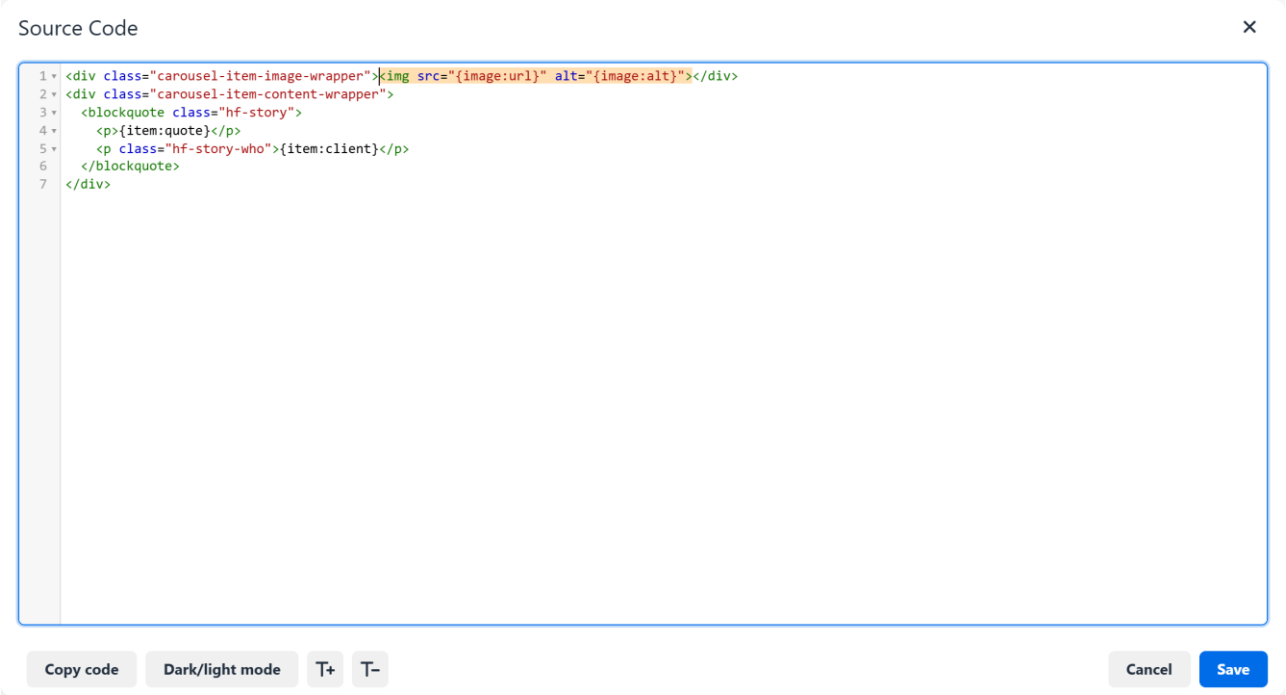
Each of these blocks has two parts, kept in different places:

- **The block**, under **Content** › **CMS Blocks**, is a template for *one* picture: the HTML each picture is drawn with, and its styles. It holds no pictures itself.
- **The copy placed on a page** holds the pictures, in order, with their alt text and, on a carousel or scroller, each picture's own words. You add and arrange them in the page designer.

So the same Carousel block can be placed on two pages with different pictures on each. And because a placed copy keeps the template it had when it was placed, changing the block later doesn't change pages already using it until you choose to. See *When you change the block* below.

Make the block

1. Open **Content** › **CMS Blocks** and click **+**. See *Blocks*.
2. Give it a **Name** and **Description**, and choose a **Type**: **Gallery**, **Carousel** or **Horizontal Scroller**.
3. In **Block Content**, write the HTML for one picture. Click **<>** (**Source code**) on the editor's toolbar to write it as HTML: the editor's own view can't draw a template, because its picture is only a placeholder until the block is used.
4. Put the block's styles in **Block Specific CSS**. They are copied into the CSS of each page the block is placed on.
5. Click **Update**, then **Publish**, so that the block appears in the designer.



A carousel block's template, in Source code

The template uses **tokens**, words in braces that are filled in for each picture. **Tokens you can use in this block's HTML**, under the editor, lists them:

- `{image:url}` is where the picture is stored and `{image:alt}` its alt text, so a template always has something like `<img src="{image:url}" alt="{image:alt}" />`.
- `{item:...}` is a hole for words of each picture's own, such as `{item:heading}`, `{item:quote}`, a gallery picture's `{item:caption}` or a link's `{item:ctaurl}` and `{item:ctatext}`. Name it what it is. Every picture then gets a box to fill it in, labelled from the name: `{item:ctaText}` becomes **Cta Text**.



The tokens a carousel can use

A few things the template has to get right:

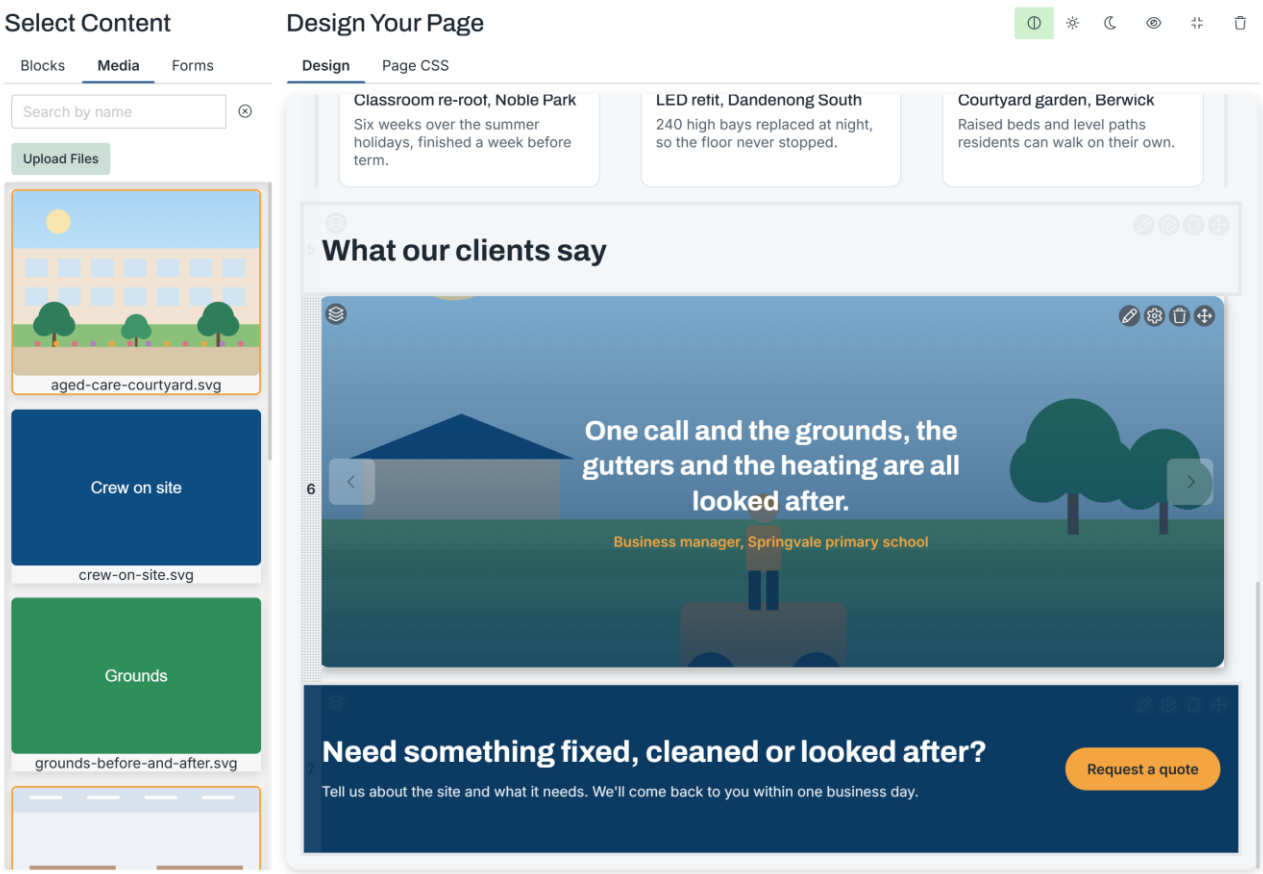
- A **carousel** shows one picture at a time over the whole block, so give it a height in **Block Specific CSS**, for example `.carousel-wrapper { height: 26rem; }`. Without one it is 340 pixels tall. Put the picture in a `carousel-item-image-wrapper` and any words over it in a `carousel-item-content-wrapper`, which centres them, as in the example above.
- A **scroller** shows three items at a time on a computer, two on a tablet and one on a phone. Put the picture in an `hs-item-image-wrapper`.
- A **gallery** is a grid twelve columns wide, and each picture's size is set in the designer, so its template is usually just the picture. To give each picture a caption, or make it a link, add a hole for it: `<a href="{item:link}"><img src="{image:url}" alt="{image:alt}" /></a>` and `<figcaption>{item:caption}</figcaption>`.

If a block's template is left empty, each picture is drawn on its own with no words.

Add one to a page

Open the page in the designer. See *The page designer*.

1. On the **Blocks** tab, drag your gallery, carousel or scroller block onto the canvas.
2. Click its pencil, or double-click it, to open its editor beneath the canvas.
3. Choose the **Media** tab and drag pictures into the editor. Each one starts with its description in Media as its alt text, or its file name if it has none.
4. Click **Close**, then **Update** to save the page.

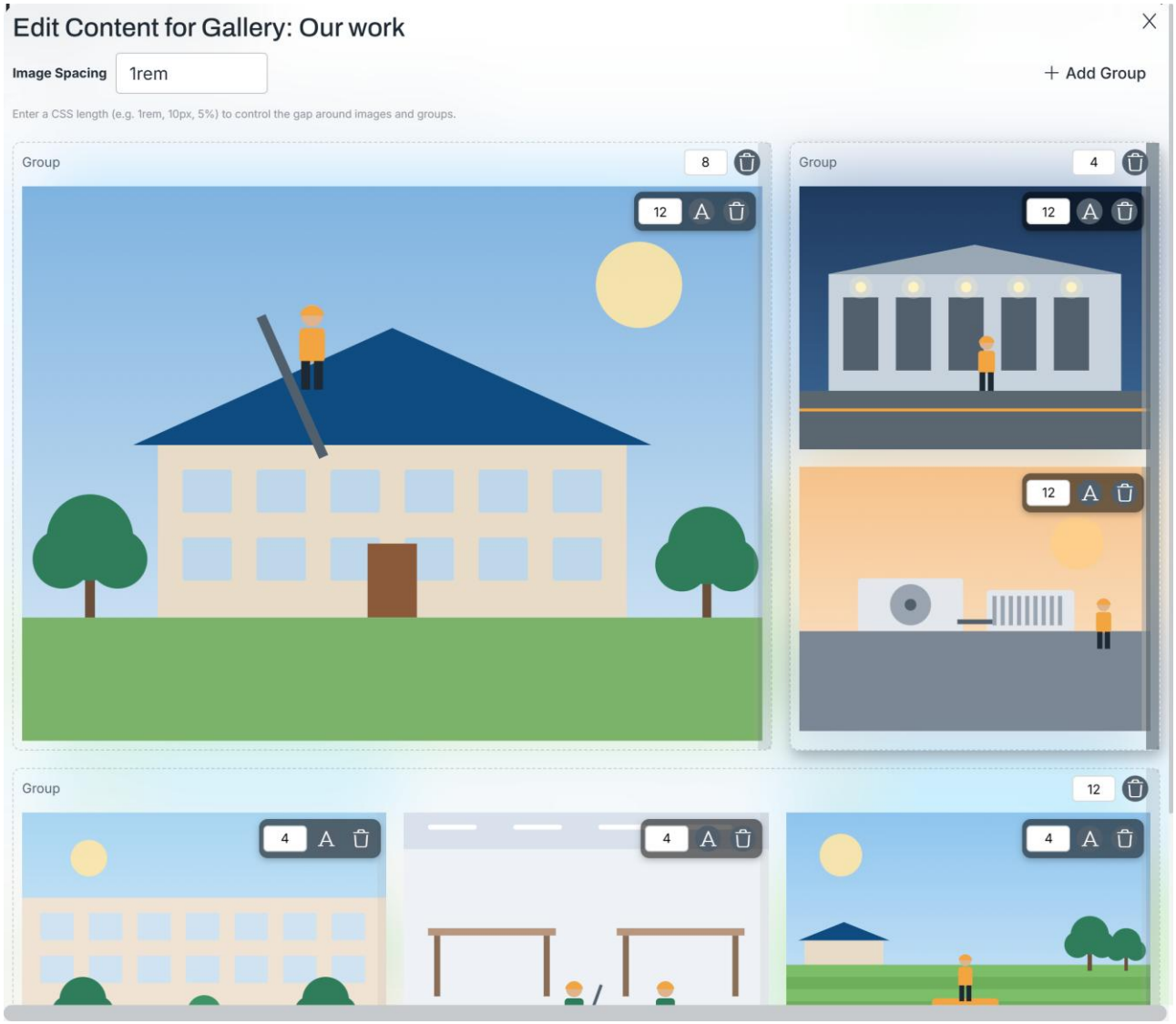


The designer with the Media tab

Two shortcuts save a step:

- Drag a picture from **Media** onto a gallery, carousel or scroller on the canvas, and it is added at the end.
- Drag a picture onto an empty part of the canvas, and a new gallery is made with that picture in it.

Galleries



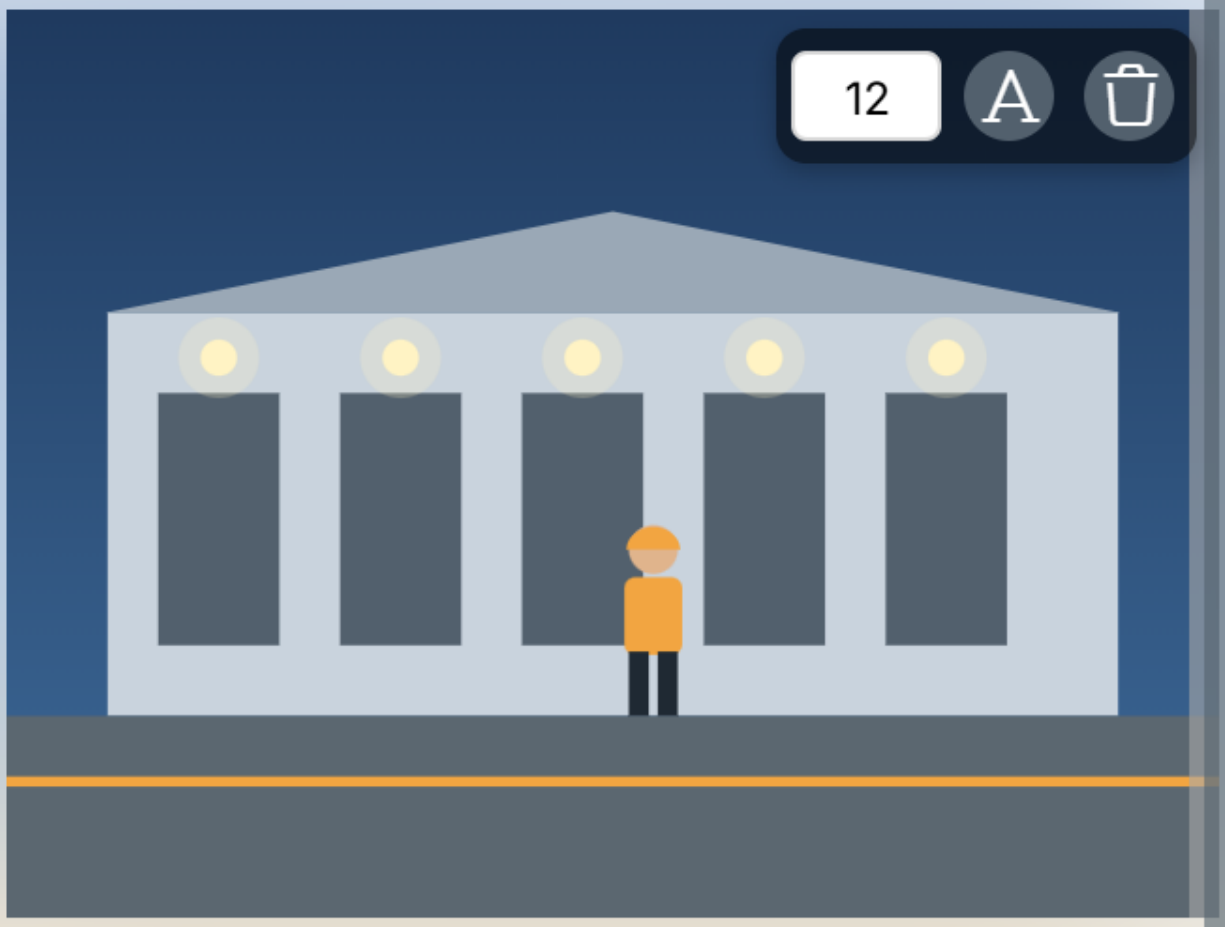
A gallery's editor

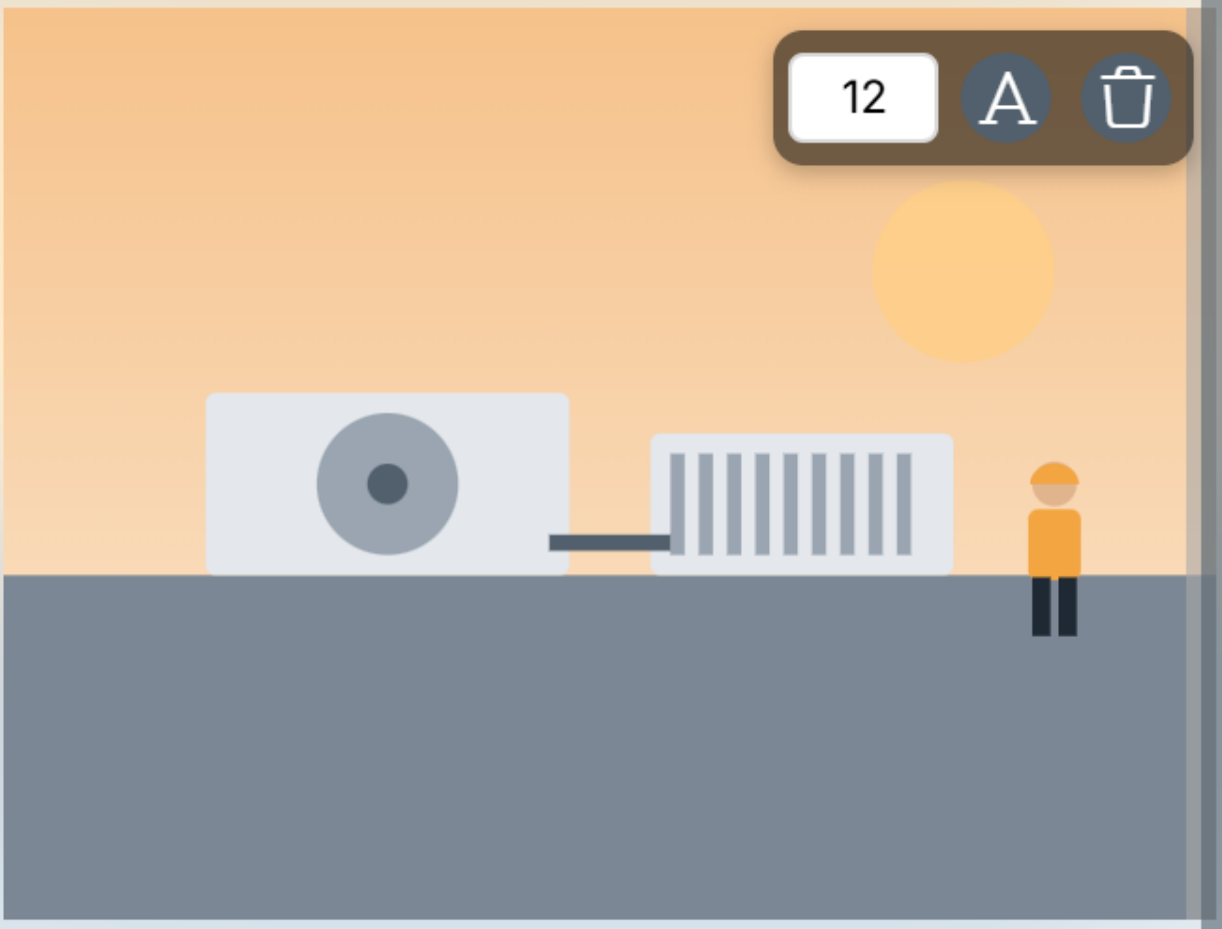
A gallery is made of **groups**, and each group holds pictures. Both are measured in twelfths of the width: a group of **8** beside a group of **4** fills one line, two thirds and one third.

- **Image Spacing** is the gap around the pictures and groups, written as a CSS length such as `1rem`, `10px` or `5%`. Anything else is put back to what it was.
- **Add Group** adds a group at the end. A group's number is its width out of 12. Change it, or drag the group's right edge. Drag a group to move it, and click its bin to delete it with its pictures.
- To add pictures, drag them from **Media** into a group's **Drag images here from the Media tab**, or onto a picture already there: the new one goes after it, the same width.
- Each picture's number is its width out of 12 *of its group*. A picture of **12** in a group of **4** fills the group's third of the line. Drag a picture to move it, within its group or into another.

Group

4





A group of two pictures, with a picture's tools

Point at a picture to see its tools: its width, the **pencil** to fill in its words, **A** to edit its alt text, and the bin to remove it. Removing a picture from a gallery leaves it in your media library.

The pencil only appears when the block's template has an `{item:...}` hole, such as a caption or a link. Click it to open the picture: it shows the picture as it will look, with each hole outlined, and a box for each hole beneath. **Reset Image Content** clears this picture's words; **Back to images** returns to the groups.

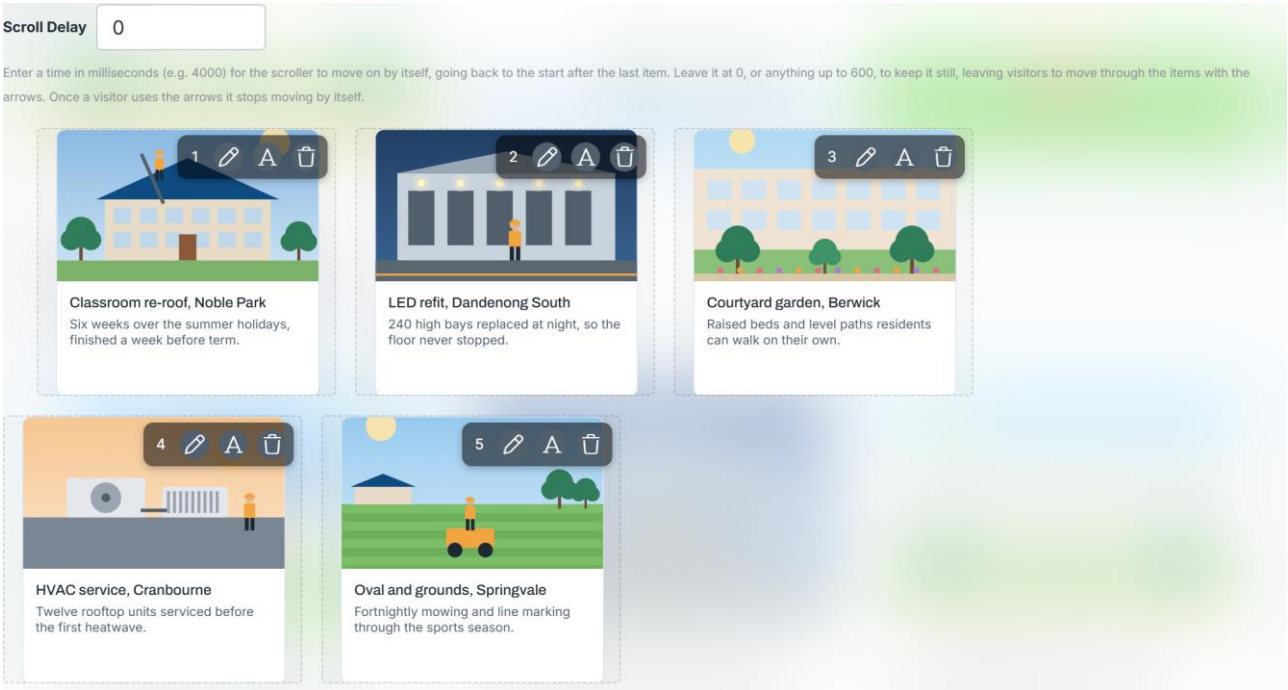
On a phone, and anything narrower than 768 pixels, every group and picture takes the full width, one under another.

Horizontal scrollers



A scroller on the published site

A scroller's editor shows its items as they will look, numbered in order.



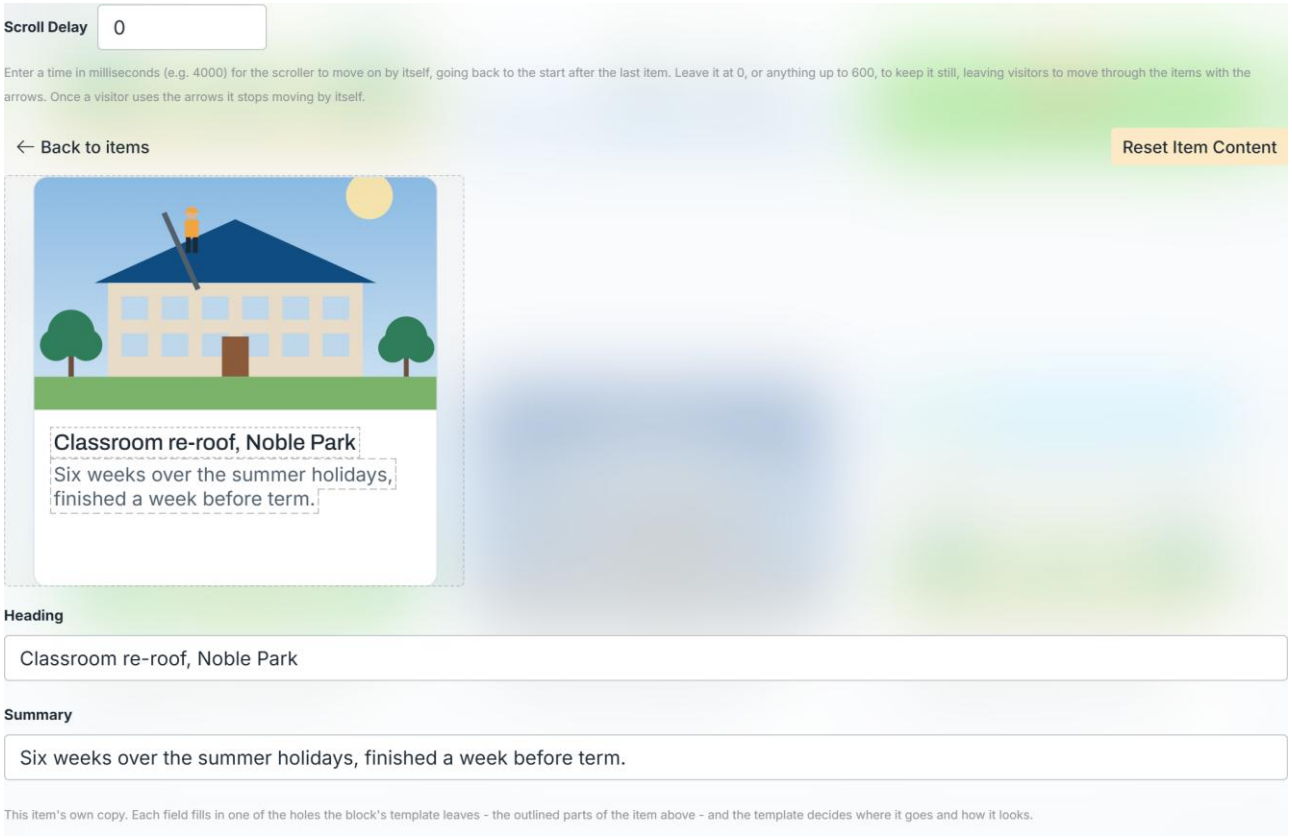
A scroller's editor

Scroll Delay makes the scroller move on by itself, in milliseconds: `4000` moves it every four seconds, and after the last item it goes back to the start. It starts at `0`, and `600` or less keeps it still. Once a visitor uses the arrows it stops moving by itself.

- Drag pictures from **Media** into the editor to add them. Drop one on an item to put it after that item, or on the space before the first to put it at the start.
- Drag an item to move it.
- Point at an item for its tools: the **pencil** opens it to fill in its words, **A** edits its alt text, and the bin removes it.

The pencil only appears when the block's template has an `{item:...}` hole. Without one, every item shows the same words, and the editor says so.

An item's own words

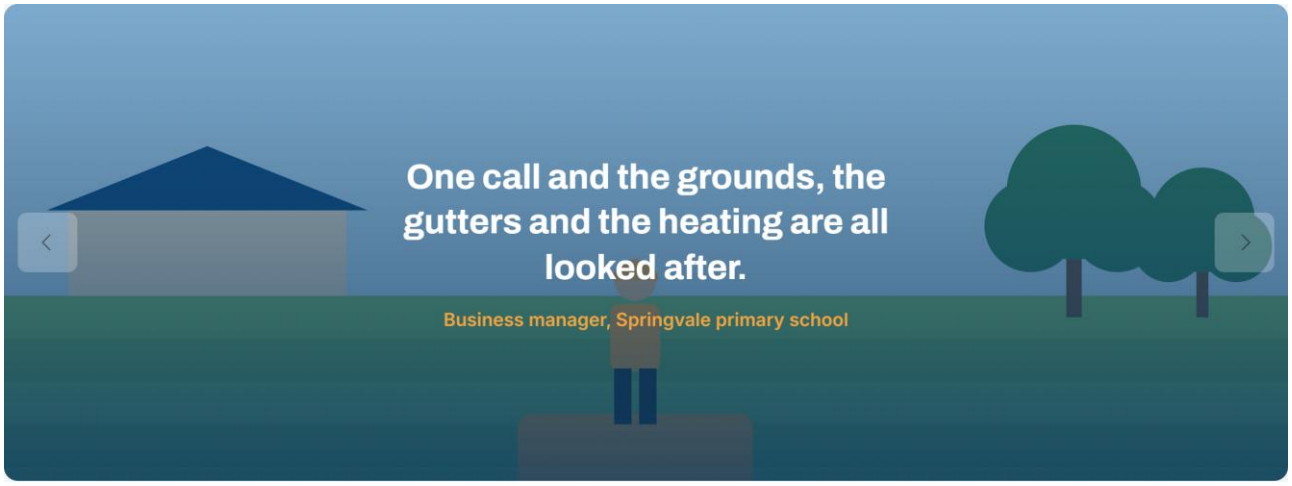


An item opened to fill in its words

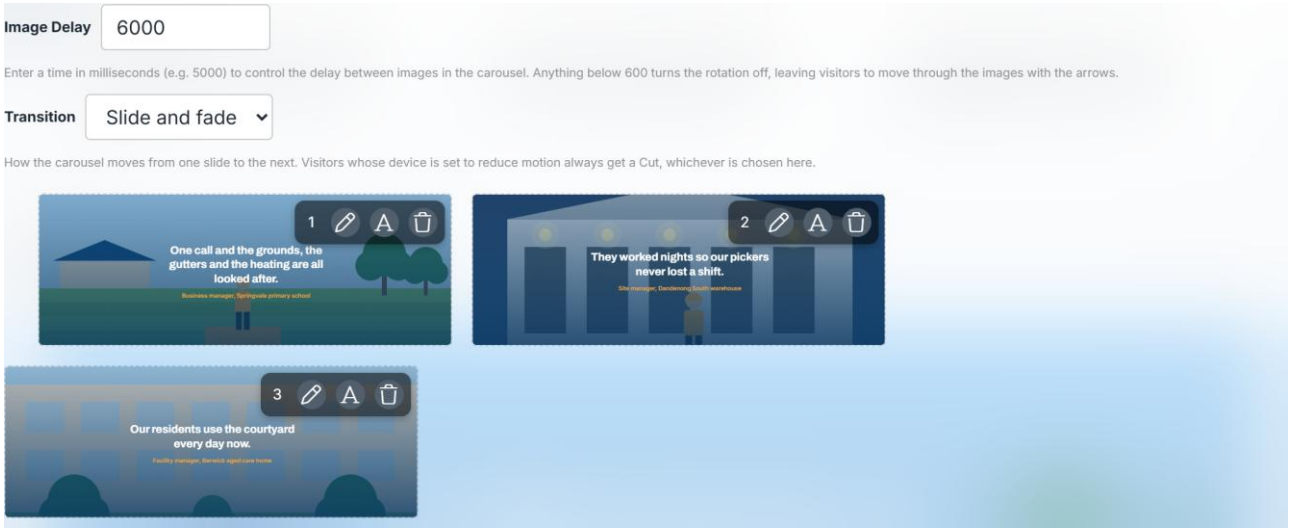
Click an item's pencil to open it. It shows the item as it will look, with each hole outlined, and a box for each hole beneath. Type the words and they appear in the item. **Reset Item Content** clears this item's words; **Back to items** returns to the row.

The words are plain text: HTML typed into a box shows as typed. Where they go and how they look is the template's business. A hole left empty shows nothing on the page.

Carousels



A carousel on the published site



A carousel's editor

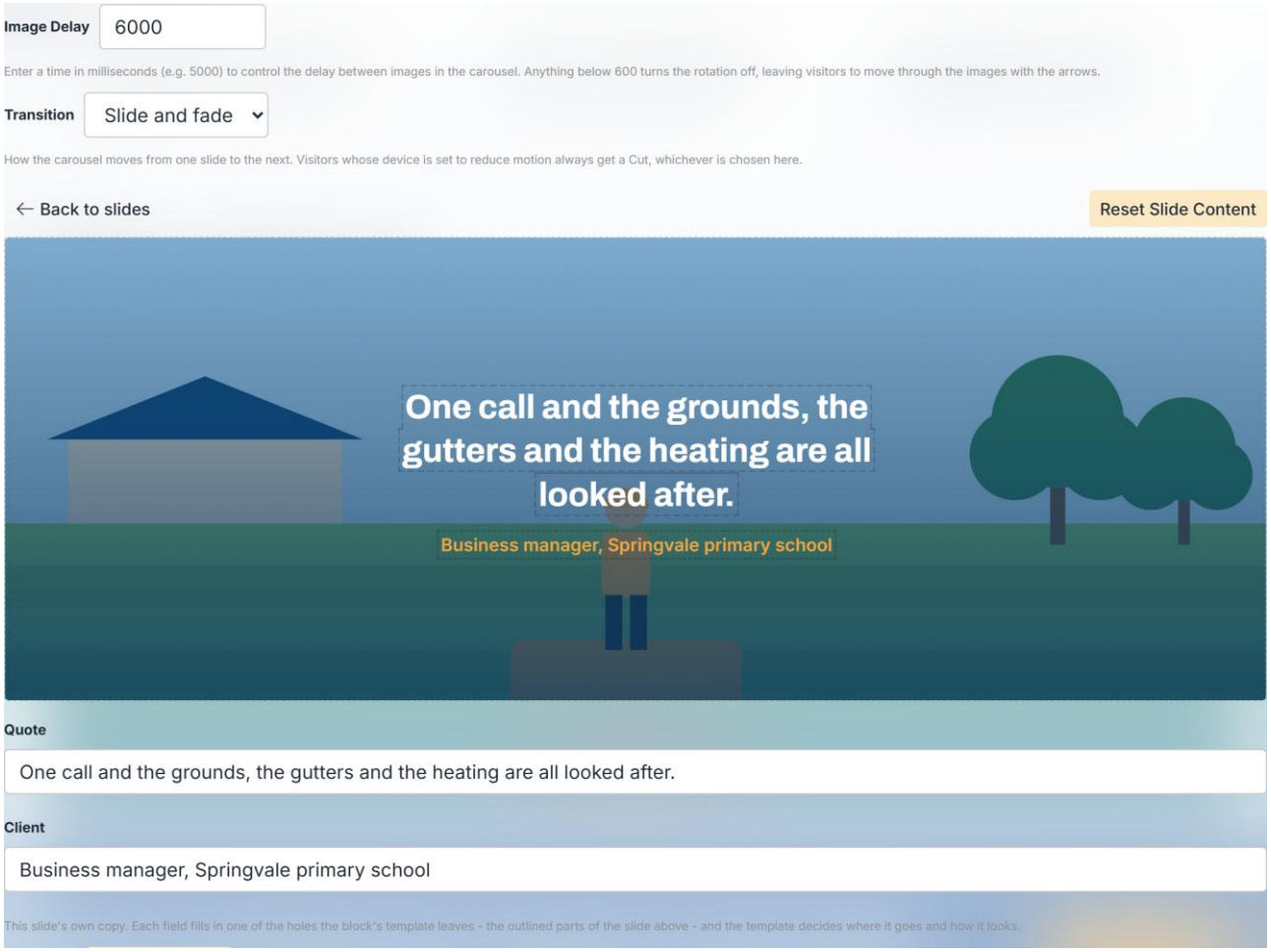
A carousel's editor works like a scroller's: drag pictures in from **Media**, drag the slides to put them in order, and use each slide's **pencil**, **A** and bin.

Image Delay is how long each slide stays, in milliseconds: `5000` is five seconds. `600` or less stops it moving by itself, and visitors use the arrows. The first slide is shown first.

Transition is how the carousel moves from one slide to the next:

- **Slide and fade**, the slide slides off to the side and fades, showing the next. Carousels made before there was a choice use this one.
- **Crossfade**, the slide fades out where it is.
- **Push**, the next slide comes in from the side and pushes this one out.
- **Zoom fade**, the slide grows a little as it fades.
- **Slide up**, like Slide and fade, but upwards.
- **Cut**, the next slide simply replaces this one.

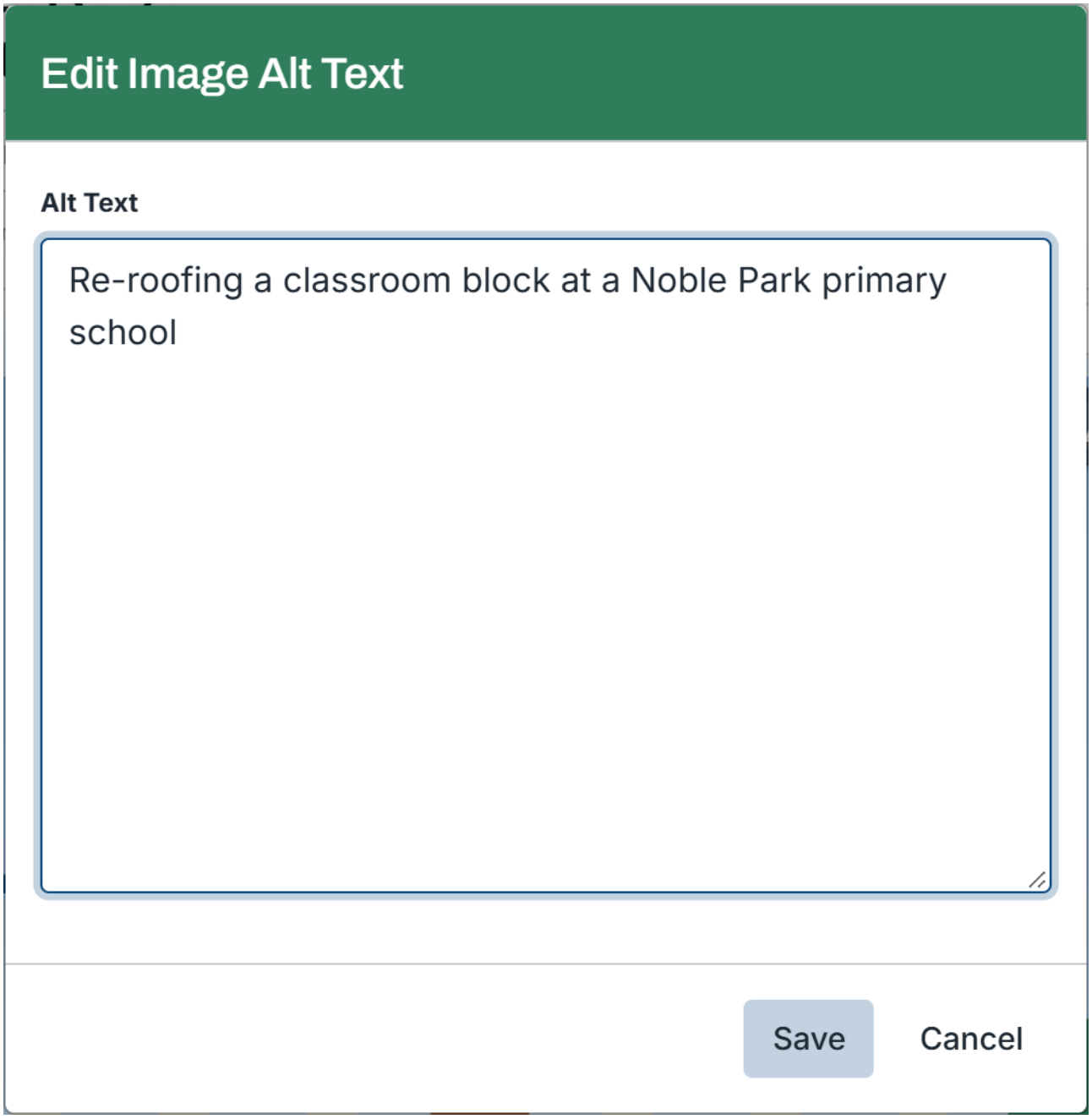
Visitors whose phone or computer is set to reduce motion always see a Cut.



A slide opened to fill in its words

A slide’s pencil opens it the same way as a scroller item’s, with **Reset Slide Content** and **Back to slides**.

Alt text



Editing a picture's alt text

Alt text describes a picture for people who can't see it, and for search engines. Click **A** on a picture to change it, and **Save**. Describe what the picture shows and why it's there: "Re-roofing a classroom block at a Noble Park primary school", rather than "roof" or the file name.

When the picture is linked to its entry in your media library, the box also offers **Also update this image's description in the media library**, so the next gallery that uses it starts with the same words.

When you change the block

A placed gallery, carousel or scroller keeps the template it had when it was placed. When you change the block under **CMS Blocks**, pages that use it don't change. To bring one up to date, open its page in the designer, click the block's cog or pencil, and click **Reset Content**. Its template is replaced with the block's latest; its pictures, their order and their words stay. Then **Update** the page.

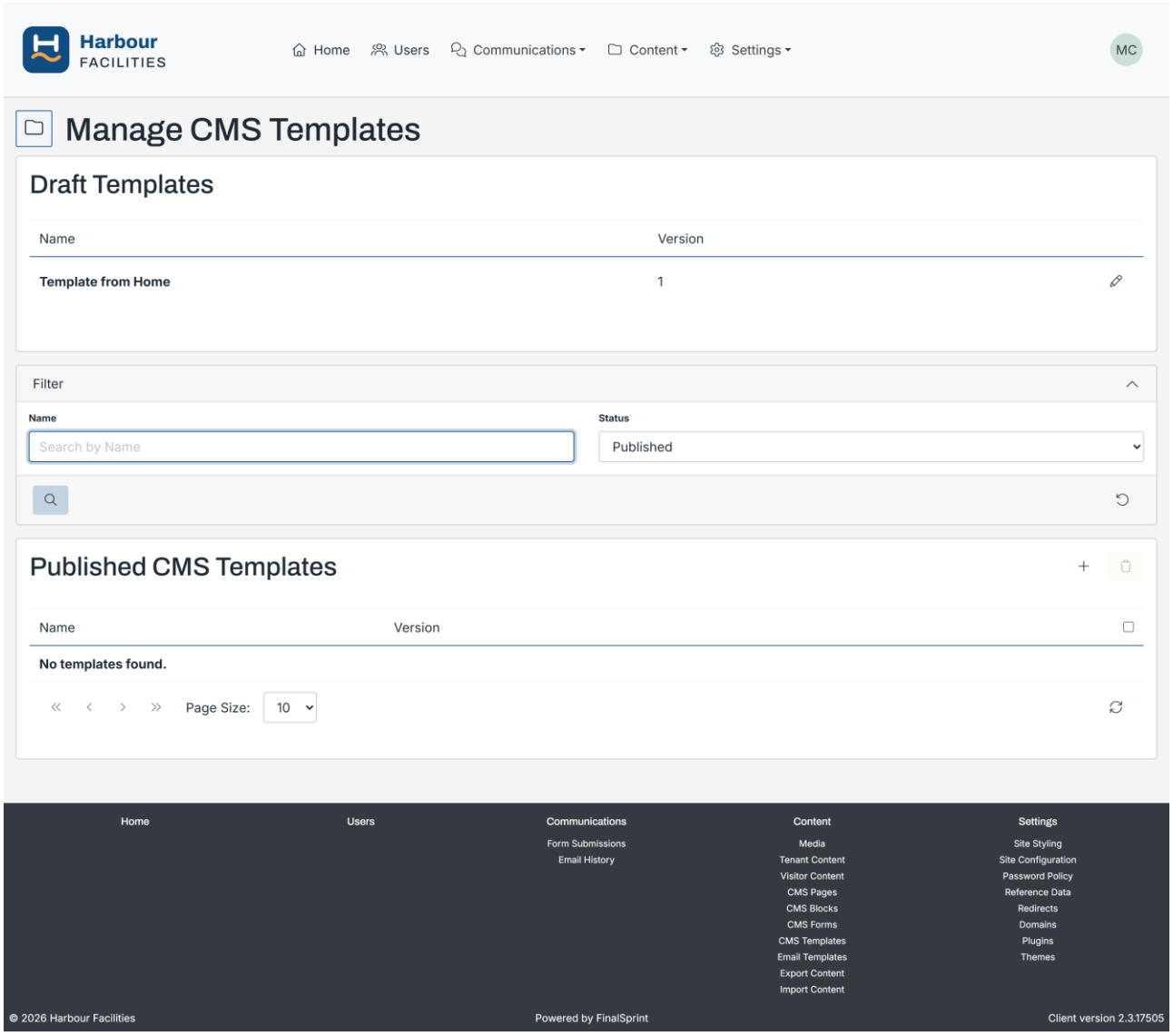
Things to watch for when changing a template:

- **Renaming a hole** loses its words. Each item's words are kept under the hole's name, so after `{item:heading}` becomes `{item:title}` every item's title is empty until you fill it in again.
- **Removing a hole** hides its words but keeps them. Put the hole back and they return.
- **Adding a hole** gives every item a new, empty box. Until it's filled in, that part of the item shows nothing.

CMS Templates

A template is a page layout you keep to start new pages from. A site whose news items, case studies or service pages all follow the same layout builds that layout once, as a template, then starts each new page from it. **CMS Templates** is where you make and look after them.

> **Who can do this:** you need the **Add / Edit Content** permission. Archiving templates also needs **Archive Content**, and publishing them needs **Publish Content**. Find templates under **Content** › **CMS Templates**.



The CMS Templates list

Find a template

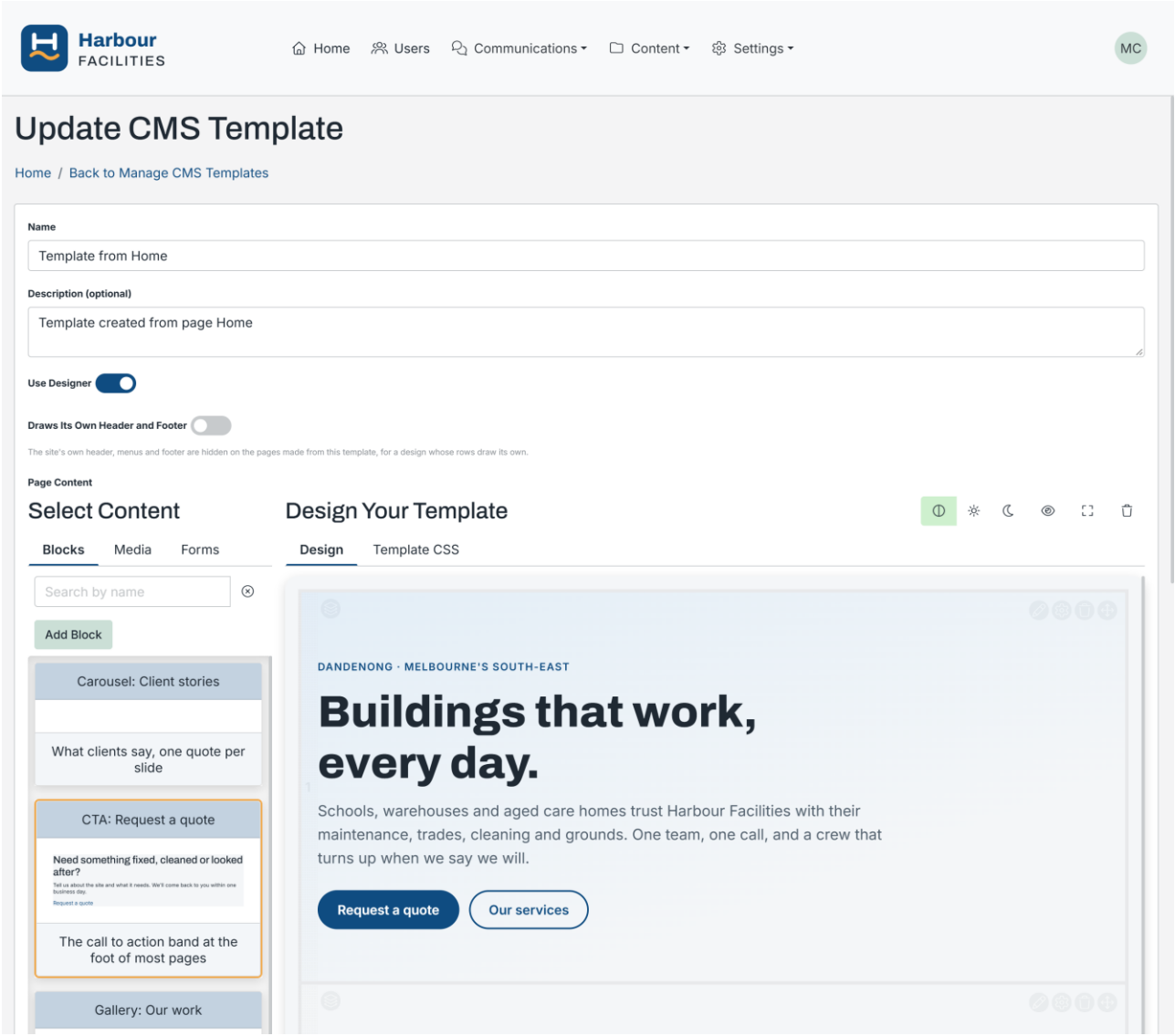
The list shows each template's **Name** and **Version**. Click a column heading to sort by it.

To look for a template, open **Filter**, type part of its name in **Name**, or choose **Published** or **Archived** in **Status**, then click the magnifying glass. The arrow beside it clears the filter.

Templates with changes that haven't been published yet are also listed under **Draft Templates** at the top. A template has to be published before pages can be started from it.

Open a template

Click the pencil on a template, or double-click its row. A template opens in the same designer as a page, with a few differences.



A template open in the designer

- **Name** and **Description** say what the template is for. The description is shown to people choosing the template, so say what it's for.
- There is no **Link**, **Tags**, **Visible To (Roles)** or search engine details. Those belong to each page made from the template.
- **Use Designer** and **Draws Its Own Header and Footer** work as they do for a page, and apply to every page made from the template.
- The designer and its **Template CSS** tab work exactly as in *The page designer*.

Make a template from a page

The quickest way to a template is to make a page you like, then turn it into one.

1. Open the page from **CMS Pages**.

2. Click **Save As Template** at the foot of the page. The button is available once the page's changes have been saved with **Update**.
3. A message says **Template created successfully**. The new template is a draft called **Template from** and the page's name, and it has the page's layout and CSS.
4. Open it from **CMS Templates**, give it a better name and description, and publish it.

Add a template

Click **+** on the list to start an empty template, lay it out in the designer, give it a **Name** and **Description**, and click **Save**.

Copy a template

The button with two sheets of paper (**Copy as new CMS Template**) opens a new template with the content of this one, a quick start for a variation.

Publish and archive a template

The buttons at the foot of a template work as they do for a page:

- **Update** saves your changes as a draft.
- **Reset** puts the template back to how it was when you opened it.
- **Publish** makes the saved version available to pages.
- **Archive** takes it out of the list of templates pages can use.
- **View History** shows earlier versions, once there's more than one.

To archive several at once, tick them in the list and click the bin (**Archive Selected CMS Templates**). Archived templates aren't deleted: choose **Archived** in the filter's **Status** to find them. When your organisation approves content before it's published, templates go through approval instead, and the bin isn't shown. See *Approvals and version history*.

Start a page from a template

Open a page, or add one, and choose the template in **Page Template**. The line under it shows the template's description and version.

The template's layout and CSS are copied onto the page, and you then change the page as you like. If the page already has content, you're asked first, because choosing a template **replaces everything on the page**:

> Changing the Page Template will delete all existing page content. Are you sure you want to continue?
>
> **Note:** a page keeps its own copy. Changing a template afterwards doesn't change the pages already made from it.

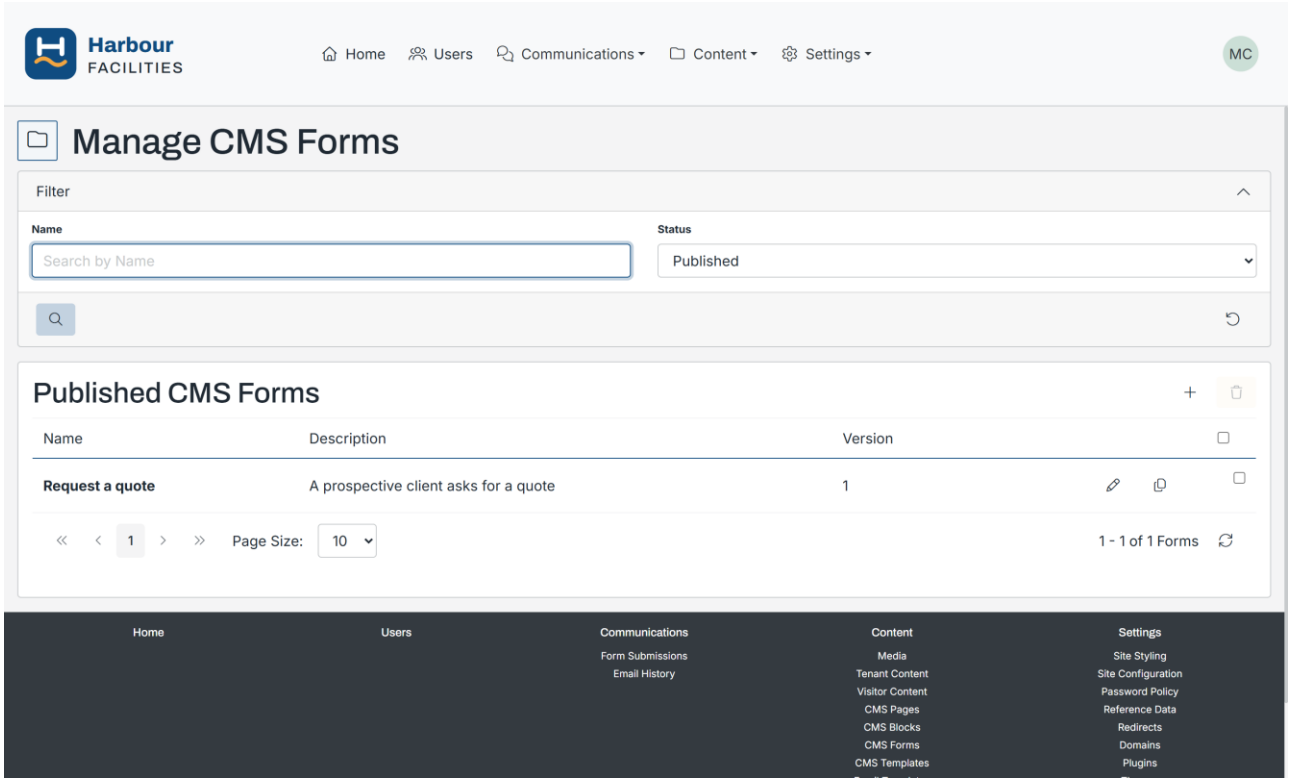
List the pages made from a template

A **Template List** block (see *Blocks*) repeats its content once for each page made from a template, for a list such as your latest news items.

CMS Forms

A form collects information from visitors: a request for a quote, a booking, a message. You build it here, put it on pages with the page designer, and read what visitors send under **Communications** › **Form Submissions**.

> **Who can do this:** you need the **Add / Edit Content** permission. Archiving forms also needs **Archive Content**, and publishing them needs **Publish Content**. Find forms under **Content** › **CMS Forms**.



The CMS Forms list

Find a form

The list shows each form's **Name**, **Description** and **Version**. Click a column heading to sort by it. To look for a form, open **Filter**, type part of its name in **Name**, or choose **Published** or **Archived** in **Status**, then click the magnifying glass. The arrow beside it clears the filter.

Forms with changes that haven't been published yet are also listed under **Draft Forms** at the top.

A form has two parts

A form is set up in two places:

- The form's **settings**: its name, what happens when someone sends it, and the words around it. This is the page you reach by clicking the pencil.
- Its **fields**: the questions. You reach them with **Manage Fields** at the foot of the settings page.

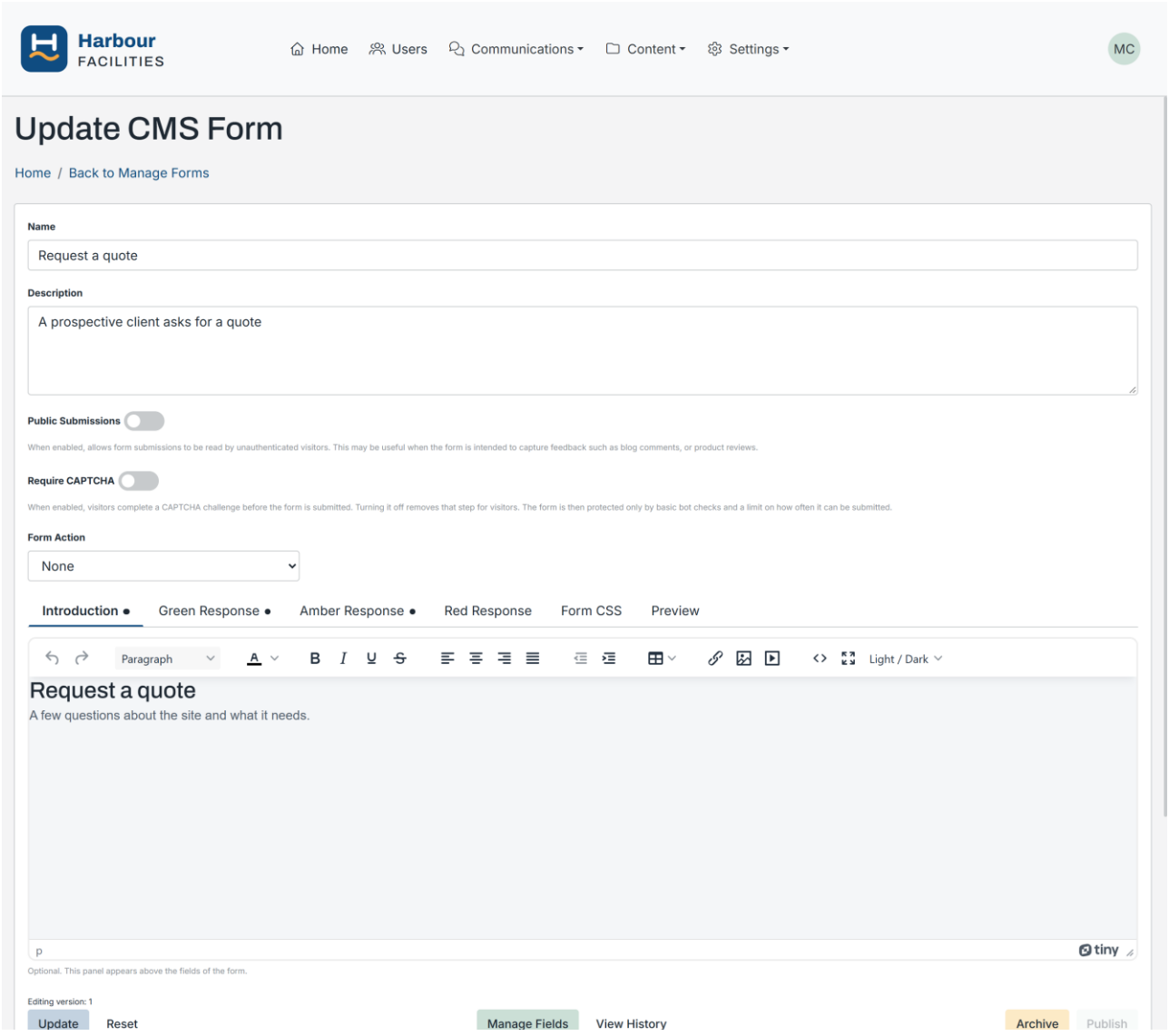
Add a form

1. Click **+** on the list.
2. Fill in the form's settings (see below) and click **Save**.

3. Click **Manage Fields** and add the form's questions.
4. Click **Publish**, then put the form on a page. See *The page designer*.

To start from a form you already have, click the button with two sheets of paper (**Copy as new CMS Form**) on its row.

The form's settings



A form's settings

- **Name** and **Description** say what the form is for. Both are shown to you when you pick a form in the page designer.
- **Public Submissions**, when on, lets anyone reading your site see what was submitted to the form. That suits a form that collects comments or reviews to show on a page. Leave it off for anything private, such as a quote request.
- **Require CAPTCHA**, when on, makes each visitor complete a CAPTCHA challenge before sending. Turning it off removes that step; the form is then protected only by basic bot checks and a limit on how often it can be sent.
- **Form Action** says what the form does with a submission, apart from keeping it under **Form Submissions**:
    - **None**: nothing else.

    - **Email To**: sends each submission to the **Email Address** you give.
    - **chx4-Work API**, **chx4-Safety API**, **chx4-Jobs API**, **chx4-Web API** or **Other API**: sends each submission on to another system. You choose the request type (**Get**, **Post**, **Put**, **Delete** or **Patch**), the **API Endpoint**, and an **Action Schema** that describes the data sent. Each field then needs an **Action Name** (see *Manage fields*). Ask whoever looks after that system for the values.

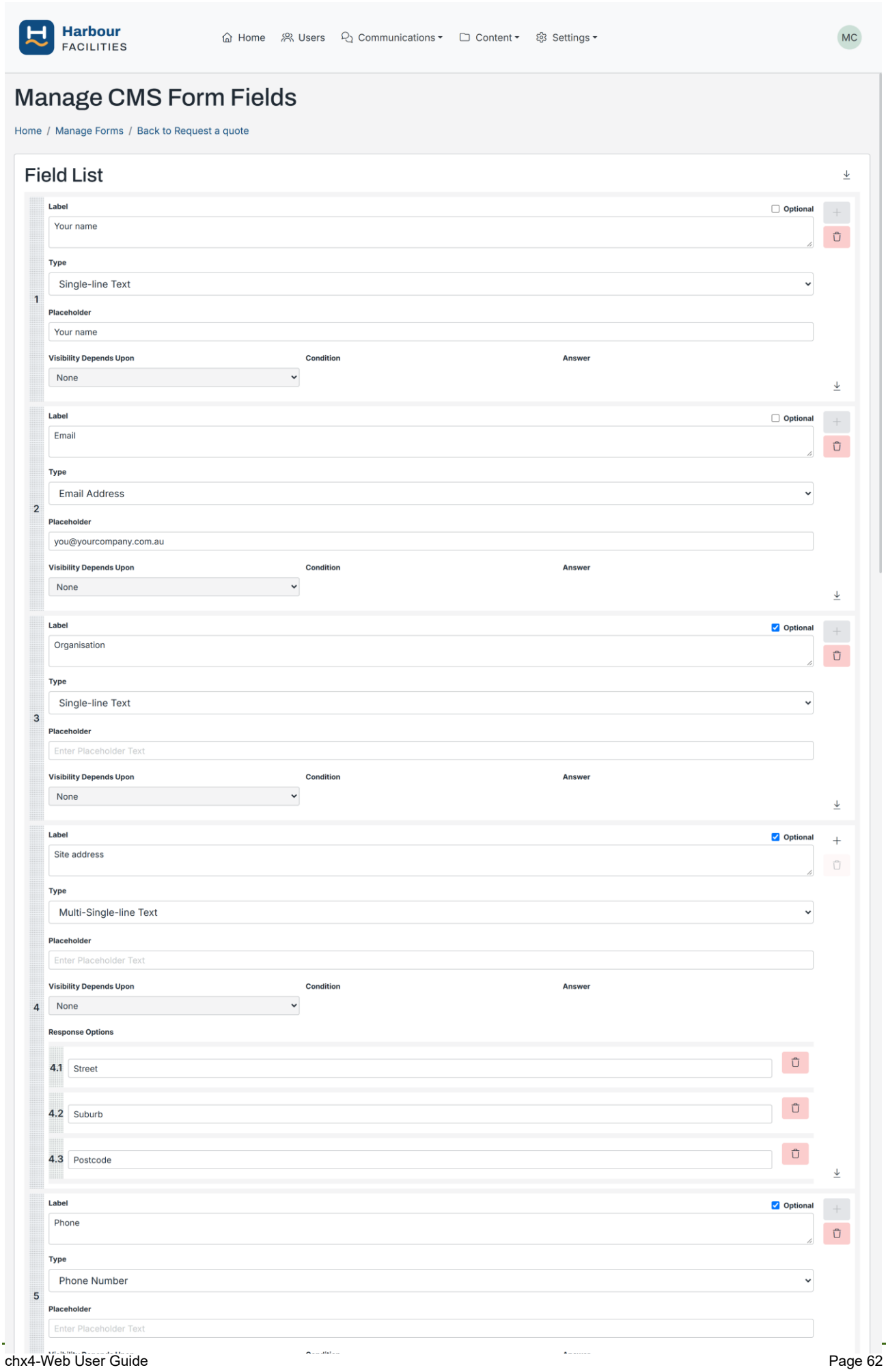
Below these, the form's content is in tabs, so you work on one piece at a time and switch between them with a click. A dot on a tab means it has something in it.

- **Introduction** appears above the fields.
- **Green Response** appears after a successful submission.
- **Amber Response** and **Red Response** appear instead when the visitor's answers have raised an amber or red alert. See *Alerts* below.
- **Form CSS** styles the form: its panels and its fields.
- **Preview** shows the form as visitors will see it, once you have saved it. It uses what is in the other tabs as it is now, saved or not, so you can change the CSS or a message and look at the result straight away. The fields are the ones last saved under **Manage Fields**. A new form has none until you add them. **Form**, **Green**, **Amber** and **Red** above the preview switch between the form and what a visitor sees after submitting it. Nothing in the preview can be submitted.

The buttons at the foot work as they do for a page: **Update** saves a draft, **Reset** undoes your changes since you opened it, **Publish** makes it live, **Archive** takes it out of use, and **View History** lists earlier versions. When your organisation approves content before it's published, **Publish** and **Archive** become **Submit for Publish Approval** and **Submit for Archive Approval**. See *Approvals and version history*.

Manage fields

Click **Manage Fields** on the form's settings page.


Harbour FACILITIES
Home
Users
Communications
Content
Settings
MC
Manage CMS Form Fields
Home / Manage Forms / Back to Request a quote
Field List
1
Label
Your name
Optional
Type
Single-line Text
Placeholder
Your name
Visibility Depends Upon
Condition
Answer
None
2
Label
Email
Optional
Type
Email Address
Placeholder
you@yourcompany.com.au
Visibility Depends Upon
Condition
Answer
None
3
Label
Organisation
Optional
Type
Single-line Text
Placeholder
Enter Placeholder Text
Visibility Depends Upon
Condition
Answer
None
4
Label
Site address
Optional
Type
Multi-Single-line Text
Placeholder
Enter Placeholder Text
Visibility Depends Upon
Condition
Answer
None
Response Options
4.1
Street
4.2
Suburb
4.3
Postcode
5
Label
Phone
Optional
Type
Phone Number
Placeholder
Enter Placeholder Text

Each field is one question. The number at its left is its position on the form. For each field you set:

- **Label**: the question, as the visitor sees it.
- **Optional**: tick it when the visitor may skip the question.
- **Type**: the kind of answer (see below).
- **Placeholder**: faint example text shown in the empty box.
- **Visibility Depends Upon**: shows the field only for some answers to an earlier field. Choose that field, then a **Condition** (**is** or **is not**) and the **Answer**. Leave it as **None** to show the field always.
- **Action Name**: appears when the form sends submissions to an API. It's the name the other system knows the answer by, and each field needs its own.

Type	The visitor sees
Single-line Text	A one-line box.
Email Address	A box that expects an email address.
Phone Number	A box that expects a phone number.
Date	A date picker.
Password	A box that hides what's typed.
Multi-line Text	A larger box for longer answers.
Multi-Single-line Text	A one-line box for each option, labelled with the option's text, such as **Street**, **Suburb** and **Postcode**. When the field isn't optional, every box has to be filled in. The answer shows as a line per box, such as `Suburb: Carlton`. Other fields can't depend on it.
Select One	A choice of one option. Tick **Dropdown** for a drop-down list instead of a row of option buttons.
Select Many	A choice of several options.
Photo	A way to add a photo.
Canvas	A box to sign or draw in, with a **Clear Canvas** button.
Range	A slider. Give it two options that are whole numbers: the first is the lowest value and the last is the highest.
Content Only	No question: a block of text or pictures shown between fields.

Add, move and remove fields

- The **+** buttons add a field above or below a field.
- Drag the number at the left of a field to move it. Drop it between two rows to give it a row of its own, or beside another field to put it on that field's row. Or press **Alt** with the up or down arrow to move it between rows, and **Alt** with the left or right arrow to move it along its row.
- The bin removes a field. It's unavailable while the field still has response options, so remove those first.

Put fields side by side

A form doesn't have to be one question per line. Fields on the same row sit side by side and share its width, which suits short questions that belong together: first and last name, email and phone, town and

postcode. Drag a field beside another to put them on one row. Drag it out between two rows to put it back on its own.

On a narrower screen, such as a phone or a tablet held upright, a row's fields are stacked one under another instead, so nothing gets squeezed. Keep long questions, such as a long text answer or a choice with many options, on a row of their own.

Answer options

Select One, **Select Many** and **Range** fields have **Response Options**. Use **+** to add an option, and fill in its text. You can drag an option to reorder it, or press **Alt** with the up or down arrow. The bin beside an option removes it. A field that has options can only change between **Select One** and **Select Many**.

Alerts

Each option has a **Value** (what is stored if the visitor picks it) and a **Response** of **Green**, **Amber** or **Red**. Green is the ordinary case. When a visitor picks an option marked amber or red, the submission is flagged that colour, and the visitor sees the form's **Amber Response** or **Red Response** in place of the green one. The flag also shows in **Form Submissions**, so urgent requests stand out.

Save and preview

Click **Update** to save the fields. **Reset** undoes your changes since you opened the page. Once the changes are saved, **View Preview** opens the form as visitors will see it, in a new tab.

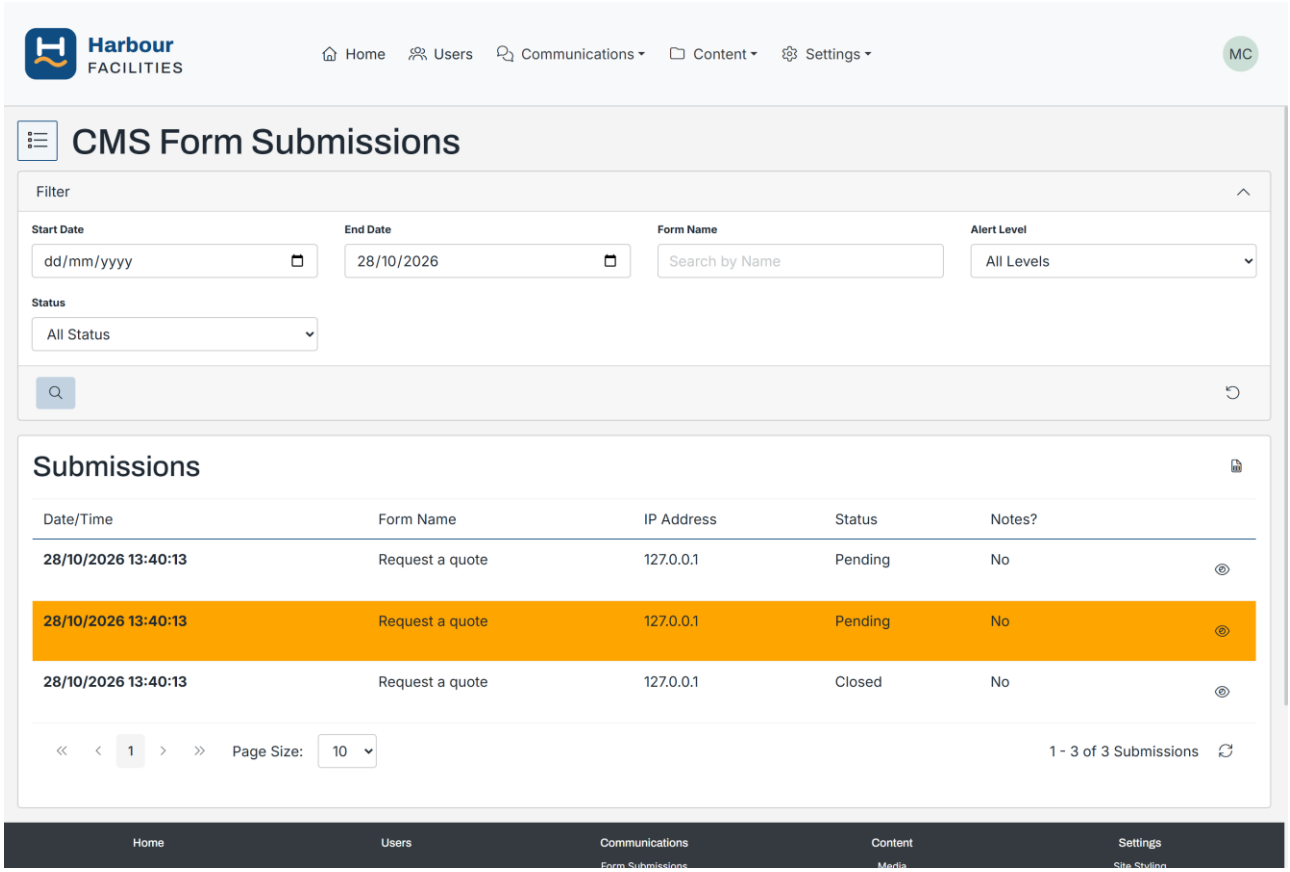
Archive forms

Tick the forms you no longer want and click the bin (**Archive Selected CMS Forms**). Archived forms aren't deleted: choose **Archived** in the filter's **Status** to find them. When your organisation approves content before it's published, forms are archived through that approval, and the bin isn't shown.

Form submissions

Everything visitors send through your site's forms is kept in **Form Submissions**. You read each one, mark how far you've got with it, add notes for your team, and export the lot to a spreadsheet.

> **Who can do this:** anyone who can log in to the tenant app can read and update submissions. There is no separate permission. Find them under **Communications** › **Form Submissions**.



The CMS Form Submissions list

Page overview

The page has a **Filter** at the top, and a list of **Submissions** beneath it. Each row is one submission, with:

- **Date/Time** it was sent.
- **Form Name**.
- **IP Address** of the visitor's computer or network.
- **Status**: **Pending**, **In Progress** or **Closed**. A new submission starts as **Pending**.
- **Notes?**: **Yes** if someone has written a note on it.

Click a column heading to sort by it. A row is coloured when the visitor's answers raised an alert: **amber** or **red** (see *Alerts* in *Forms*). Rows with no alert stay white, so the urgent ones stand out.

The same counts appear as charts on **Home**, which also links here with **View all submissions**.

Find submissions

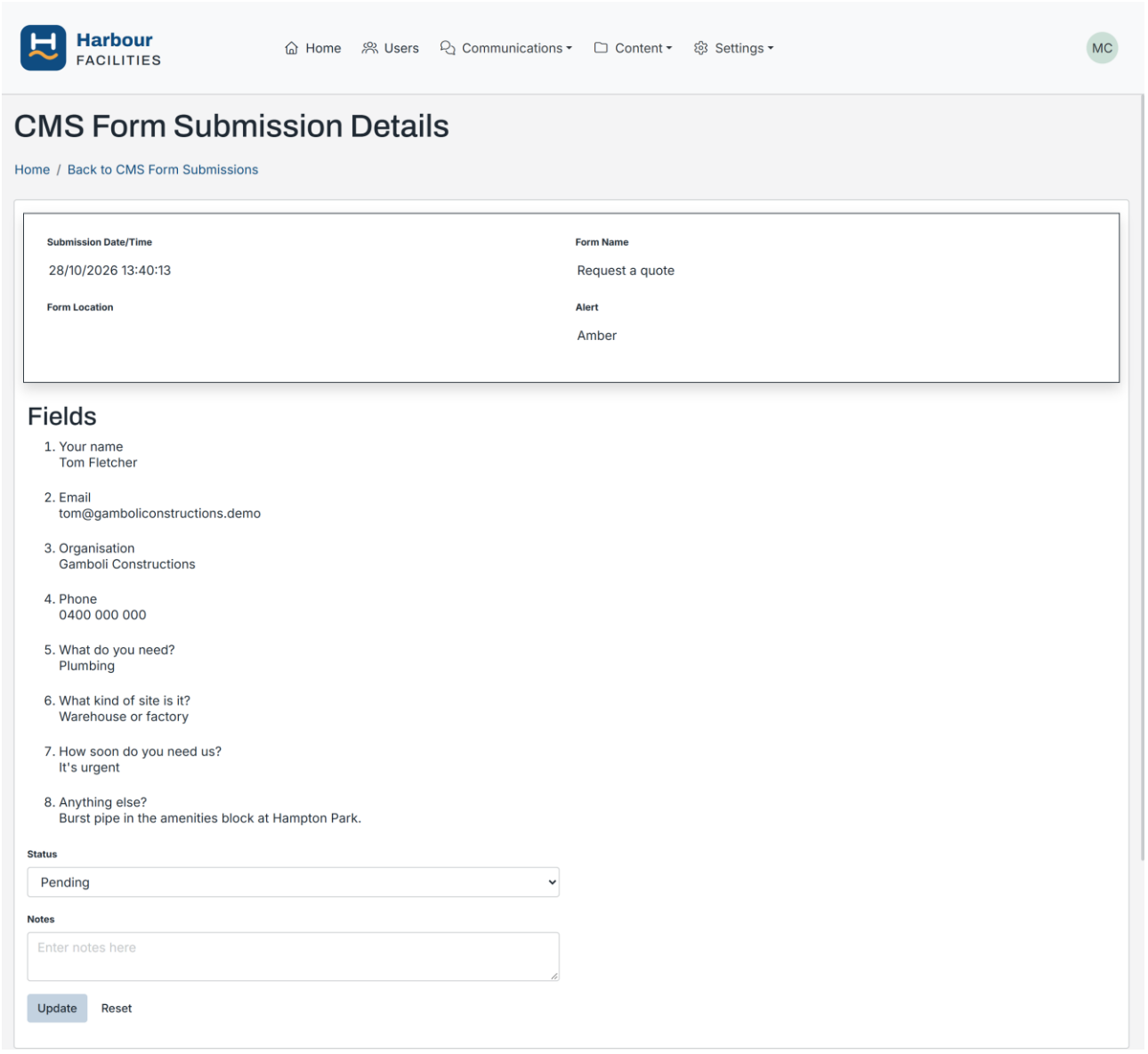
Open **Filter** and choose any of these:

- **Start Date** and **End Date**, to see submissions sent between two days. **End Date** starts as today.
- **Form Name**, to see one form's submissions. Type part of its name.
- **Alert Level**: **All Levels**, **Green**, **Amber** or **Red**.
- **Status**: **All Status**, **Pending**, **In Progress** or **Closed**.

Then click the magnifying glass. The arrow beside it clears the filter.

Read a submission

Click the eye on a row, or double-click the row.



A submission

The page shows when and through which form the submission was sent, and **Form Location**, the page of your site the visitor was on, and its **Alert**: Green, Amber or Red. Beneath **Fields** are the questions and the visitor's answers, in the order they were on the form. Questions the visitor skipped, and any text-only parts of the form, are left out. A **Password** answer is hidden, and a **Photo** or **Canvas** answer is shown as a picture.

Work through a submission

At the foot of the page:

1. Choose its **Status**: **Pending** for new, **In Progress** while you're dealing with it, and **Closed** when done.
2. Write anything your team should know in **Notes**.
3. Click **Update**.

Reset puts the status and notes back to how they were when you opened the page.

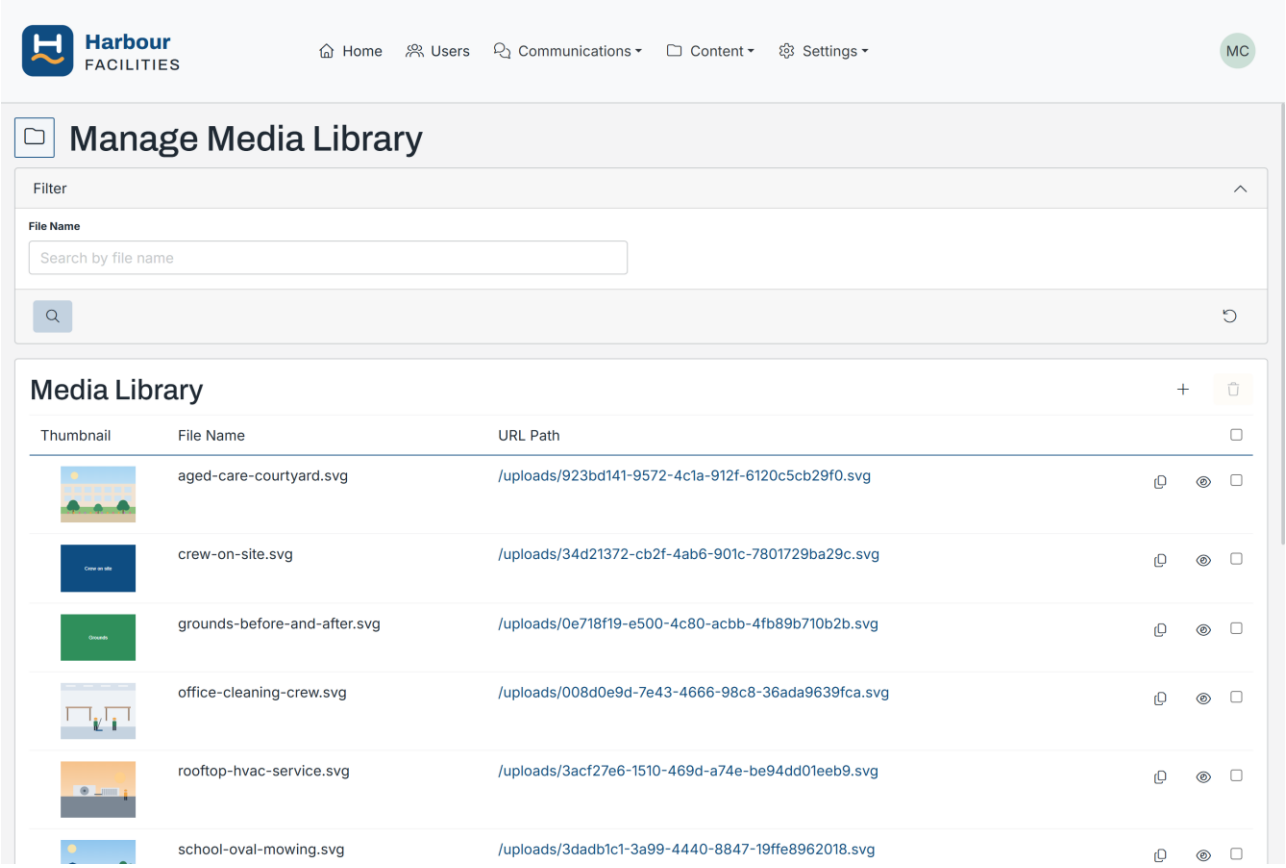
Export submissions

Click the spreadsheet button (**Export Submission Data**) above the list. chx4-Web downloads `submission-data.csv`, which opens in Excel or any spreadsheet program. It holds the submissions from the dates, form and alert level you've chosen in the filter.

Media

The media library holds the pictures, documents, audio and video you use on your site. You add a file once, then use it on any page: drag a picture onto a block in the page designer, or link to a document from your text.

> **Who can do this:** you need the **Add / Edit Content** permission. Find the library under **Content** › **Media**.



The media library

Page overview

The list shows each file's **Thumbnail** (pictures show a small copy; other files show an icon), its **File Name** and its **URL Path**, the address the file is served from on your site. Click a column heading to sort by it.

To look for a file, open **Filter**, type part of its name in **File Name** and click the magnifying glass. The arrow beside it clears the filter.

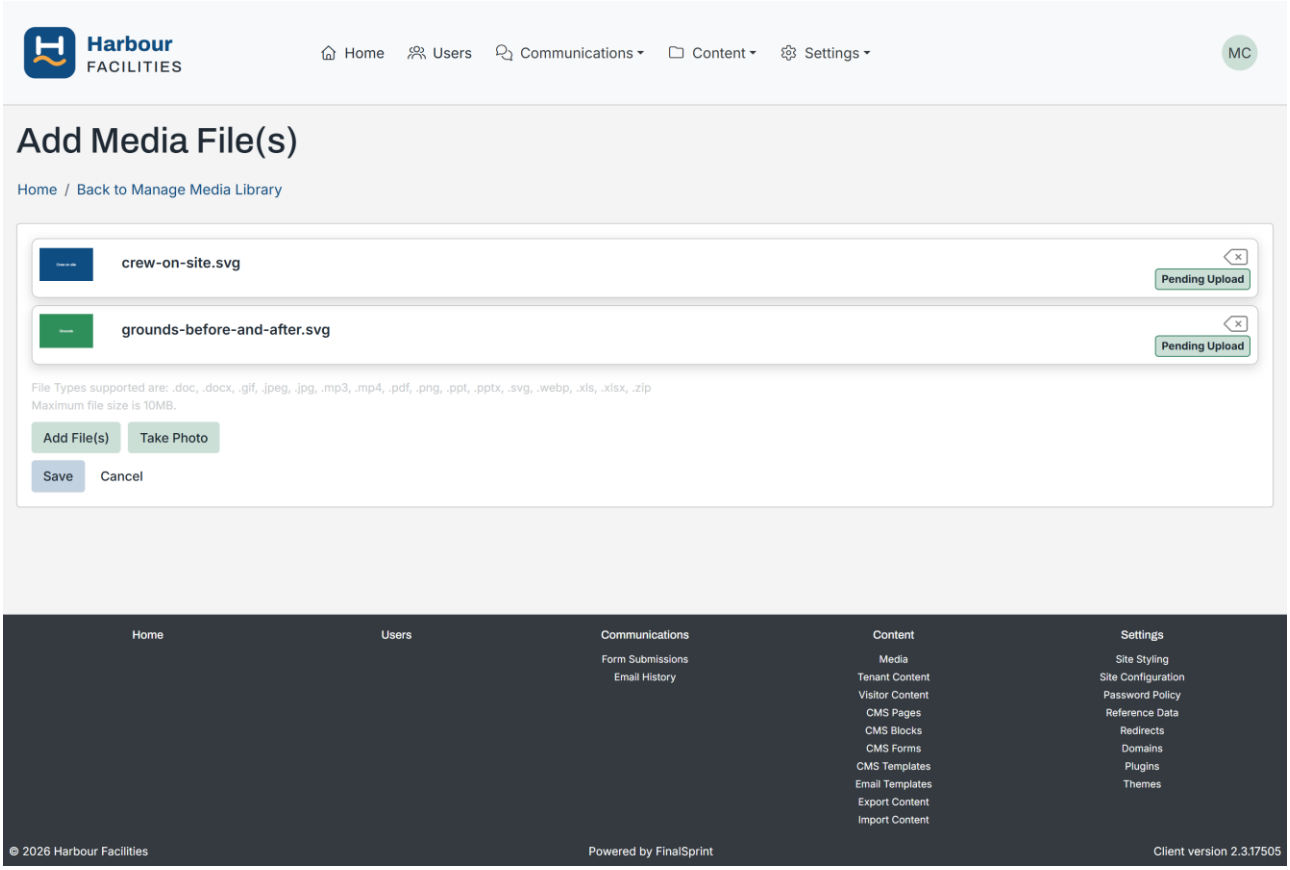
On each row:

- The **copy** button copies the file's address, ready to paste into a link or an image.
- The **eye** opens a preview of the file.
- The tick box selects the file, for deleting.

Click the **URL Path** to open the file in a new page, as a visitor would see it. Double-clicking a row opens the preview too.

Add files

1. Click **+** above the list.



Adding files

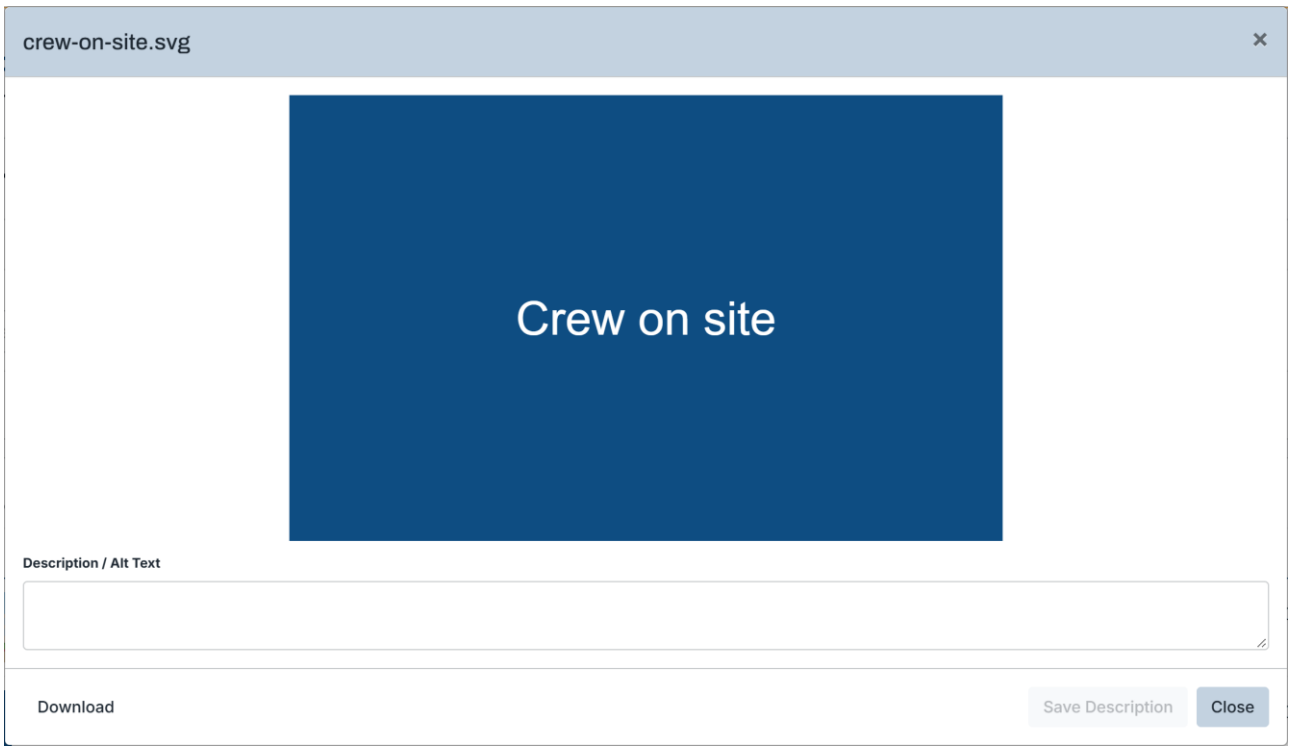
2. Click **Add File(s)** and choose one or more files. Each is listed as **Pending Upload**, with a small picture of it if it's an image. Use **Take Photo** to add a photo from your device's camera.
3. To drop a file you chose by mistake, click the button with the cross at the right of its row.
4. Click **Save**. A message says **Your files have been successfully saved**, and you're taken back to the list.

The page lists the types it accepts: Word, Excel and PowerPoint files, **.pdf**, **.zip**, the pictures **.jpg**, **.jpeg**, **.png**, **.gif**, **.svg** and **.webp**, and the sound and video files **.mp3** and **.mp4**. Each file can be up to 10 MB.

> **Tip:** name files for what they show, such as `crew-on-site.jpg`. The name is how you'll find the file later, in the library and in the page designer.

Preview a file

Click the eye on a file.



A file's preview

The preview shows the picture, plays the video, or displays the document. **Download** saves a copy to your computer, and **Close** shuts the preview.

For a picture, **Description / Alt Text** says what it shows, for people who can't see it and for search engines. Type a short description and click **Save Description**. The page designer's **Media** tab shows it under the picture. It's worth filling in for every picture.

Use a file on a page

- In the page designer, open the **Media** tab and drag a picture onto a block, or click a picture to copy its address. See *The page designer*.
- In any text editor, add a link or an image and paste the file's address, from the **copy** button.

Delete files

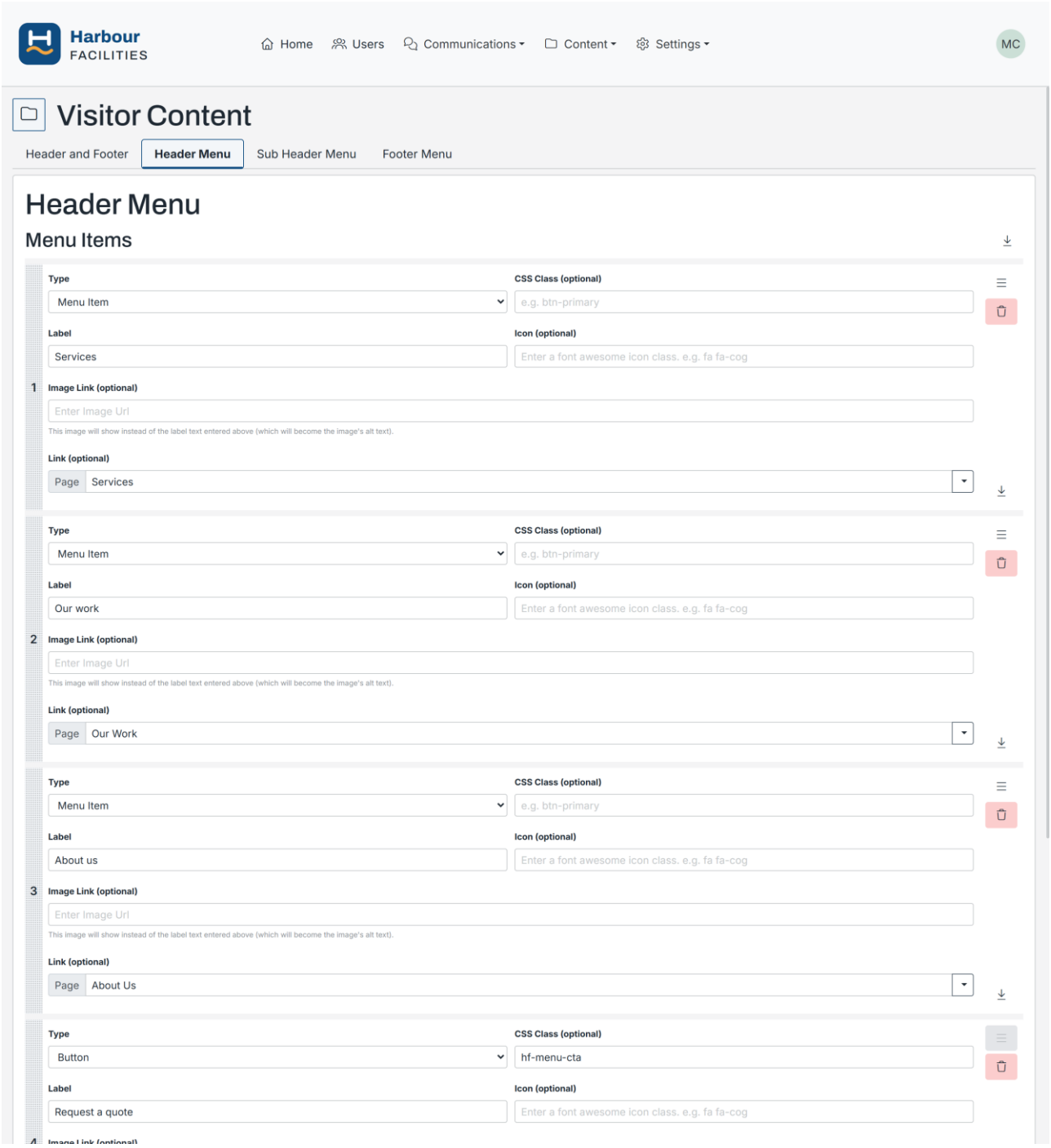
Tick the files you no longer want, click the bin above the list, and confirm. Deleting a file removes it for good.

> **Note:** deleting a file that your pages, blocks or menus use leaves a broken link or a missing picture there. Check before you delete, and replace the file on those pages first.

Menus, header and footer

Which header and footer your public site shows, and the menus in them, are looked after under **Visitor Content**. Change them here and every page of your site changes with them.

> **Who can do this:** you need the **Add / Edit Content** permission. Publishing and archiving need **Publish Content** and **Archive Content**. Find them under **Content** › **Visitor Content**.



Visitor Content: the header menu

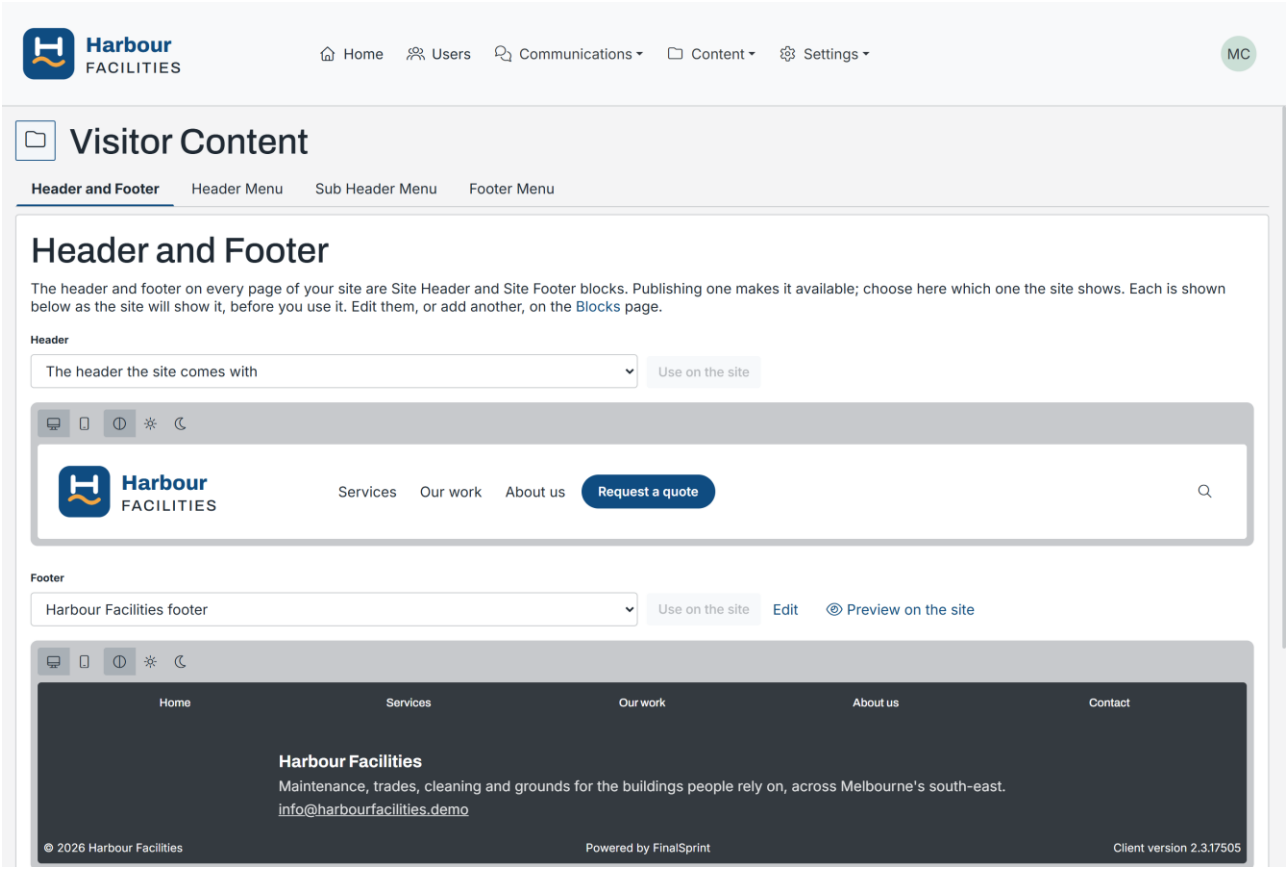
Visitor Content has four tabs:

Tab	What it controls
Header and Footer	Which Site Header and Site Footer block the site

Tab	What it controls
	shows on every page.
Header Menu	The site's main menu, across the top.
Sub Header Menu	A second menu for the header area, and the one the footer can reuse.
Footer Menu	The links at the foot of every page.

> **Note:** these tabs are about the site your visitors see. The same tabs under **Tenant Content** look after this tenant app. See *The tenant app's own content*.

Choose the header and footer



Visitor Content: the Header and Footer tab

The header and footer on every page are blocks: a **Site Header** block and a **Site Footer** block. Each holds the whole header or footer, its HTML and the CSS that styles it, and places your menus with `{menu:main}` and `{menu:footer}`. You make and edit them on the **Blocks** page; see *Blocks*.

You can have several of each published, such as your own and one a theme brought. Publishing one doesn't put it on the site. On the **Header and Footer** tab:

1. Pick a block in **Header** or **Footer**. The first choice is the header or footer the site comes with.
2. Click **Use on the site**. Every page shows it straight away.

Under each list is the picked header or footer as your site will show it, with your site's own styling, before you use it. The two buttons above it show it on a computer or a phone; on a phone you can open the header's menu. When your site has a dark version too, the half circle, sun and moon beside them show it as this device is set, light or dark. **Preview on the site** opens it on a whole page, and **Edit** opens the block. The header and footer the site shows can't be archived until you choose others. Choosing needs the **Publish Content** permission.

Edit a menu

1. Click the tab of the menu you want.
2. Change an item, add one or remove one (see below).
3. Click **Update** to save your changes as a draft.
4. Click **Publish** to put them on your site.

Each menu is a list of numbered items. For each item you can set:

- **Type**: what kind of item it is. At the top level: **Menu Item** (an ordinary link), **Text** (words with no link) or **Button** (a link drawn as a button). Inside a dropdown, the choices are **Menu Item**, **Text**, **Divider** (a line between groups) and **Header** (a title for a group).
- **Label**: the words shown. A **Divider** has none.
- **CSS Class**: a style from your site's own styling, such as `btn-primary`. Use letters, numbers, hyphens and underscores, separated by spaces.
- **Icon**: the class of an icon from the icon set, such as `fa fa-cog`.
- **Image Link**: the address of a picture to show instead of the label. The label then becomes the picture's alt text. Pick the address of a file from **Media**.
- **Link**: where the item goes. Type an address, or click the arrow beside the box and choose one of your own pages. The grey label beside the box says what kind of link it is.
- **Description**: a line of extra text under the item (the sub header and footer menus only).

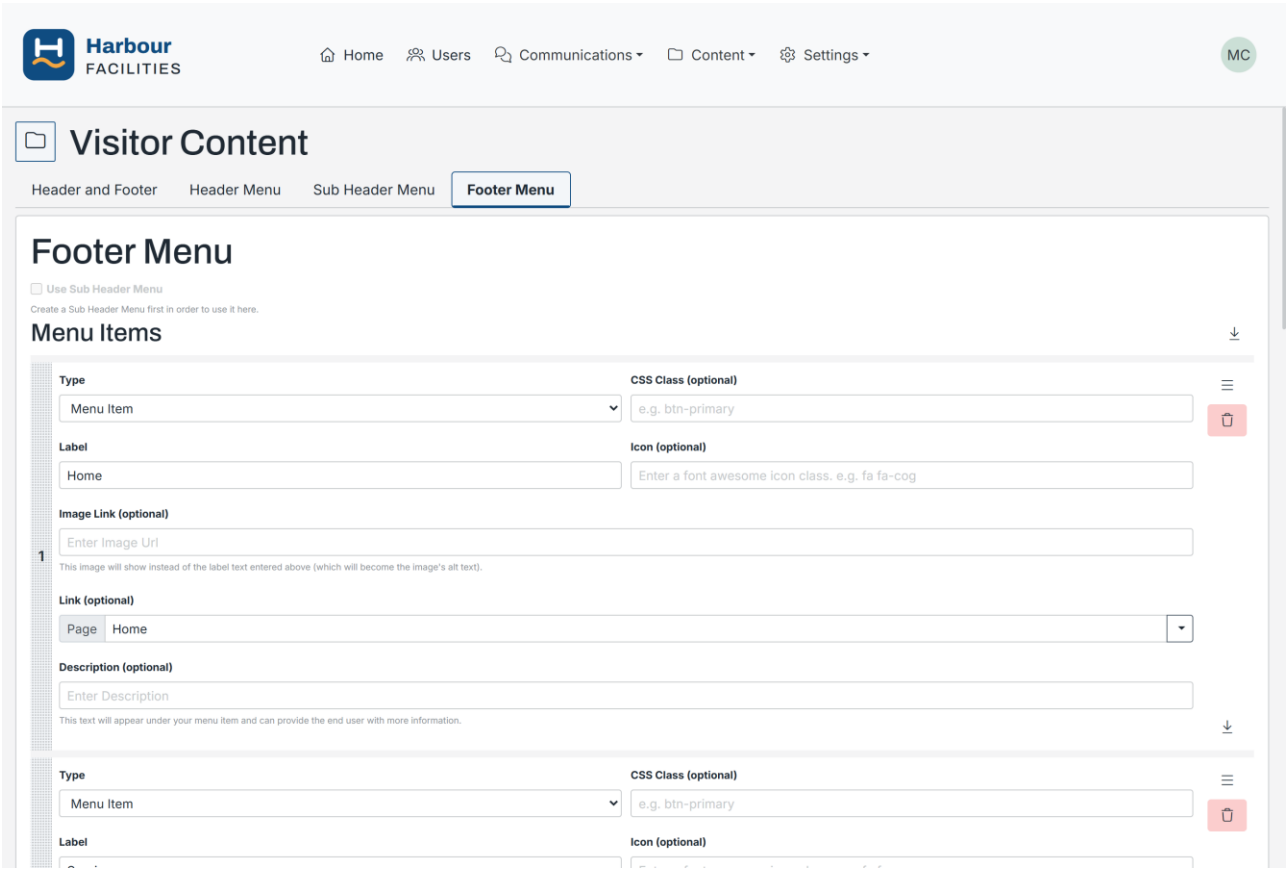
Only a **Menu Item** shows every option. A **Button** has no image or description, and a **Text** or **Header** has neither a link nor an icon, so their boxes are greyed out.

Add, move and remove items

- The arrow at the top right of **Menu Items** adds an item at the top. The arrow at the foot of an item adds one below it.
- Drag the number at the left of an item to move it.
- The bin removes an item.
- The three-line button on an item **adds a submenu**: a dropdown of items under it. Only a **Menu Item** can have one, and an item that has a submenu has to stay a **Menu Item** and can't be deleted until its submenu is empty.

The footer menu

The **Footer Menu** can reuse your **Sub Header Menu** instead of having its own list. Tick **Use Sub Header Menu** and the footer shows the same links, kept up to date automatically. The box is greyed out until a Sub Header Menu exists.



The Footer Menu tab, before there's a Sub Header Menu to reuse

Publish, archive and history

For menus (the header and footer blocks are published on the **Blocks** page):

- **Update** saves the changes as a draft, and **Reset** undoes them since you opened the page.
- **Editing Version** and **Published Version** say which version you're working on and which one the site shows.
- **Publish** puts the saved version live. Its arrow offers **Schedule Publish**.
- **Archive** takes the menu off the site. Its arrow offers **Schedule Archive**.
- **View History** lists the earlier versions, and appears once there's more than one.

When your organisation approves content before it's published, **Publish** is replaced by **Submit for Approval**. See *Approvals and version history*.

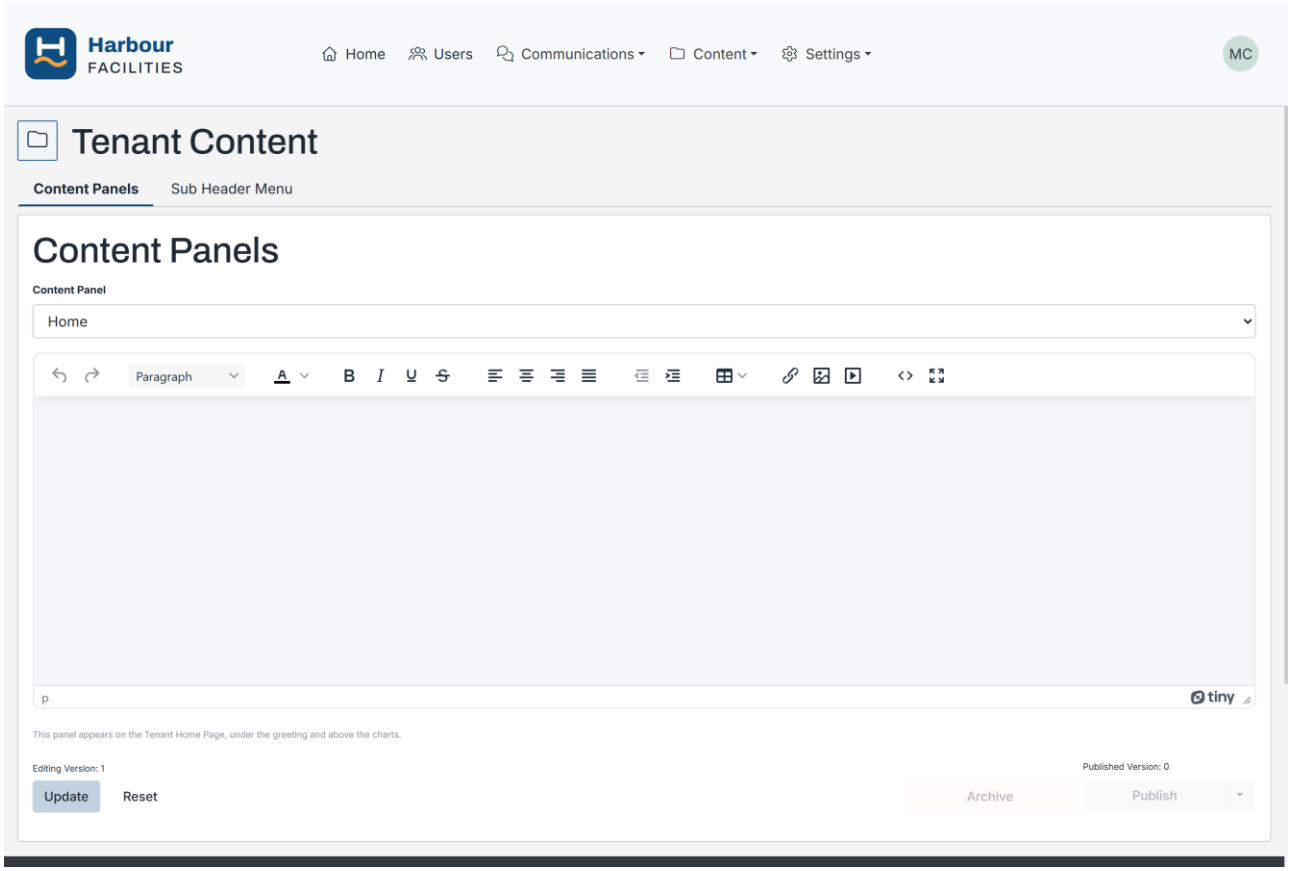
Restyling the header and footer

A Site Header or Site Footer block's CSS styles everything in it, including how the main menu folds up on a phone: the menu's button and the menu it opens can be restyled as a dropdown, a drawer from the side or a full-screen menu. See *Blocks*.

The tenant app’s own content

Tenant Content works like **Visitor Content**, but what you change here is shown to the people who log in to the tenant app, not to visitors of your public site. It’s the place for a welcome message for your team, a line in the app’s footer, or links to your own resources such as a staff handbook.

> **Who can do this:** you need the **Add / Edit Content** permission. Publishing and archiving need **Publish Content** and **Archive Content**. Find it under **Content** › **Tenant Content**.



Tenant Content: the Home panel

The page has two tabs, **Content Panels** and **Sub Header Menu**. Editing, saving, publishing, scheduling and history all work as described in *Menus, header and footer*. This module covers what’s different.

Content panels

Choose a panel in **Content Panel**, write its text in the editor and click **Update**, then **Publish**:

- **Home** appears on the tenant app’s **Home** page, under the greeting. Use it for a welcome message, a notice or a reminder for your team. See *Home*.
- **Footer** appears in the footer of every page of the tenant app, below its links.

Until a panel is published, nothing is shown.

Sub Header Menu

Items you add to the **Sub Header Menu** are added to the end of the menu across the top of the tenant app, after **Home**, **Users**, **Communications**, **Content** and **Settings**. They work as they do on the public site: each can be a link, a button, or a dropdown of links. Link to a page of your site, or to any address.

> **Tip:** keep to a few items. They share the bar with the app's own menus.

Approvals and version history

Every change to a page, block, form, template, menu or panel is kept as a new version, so nothing is ever lost. A site can also ask that changes be **approved** by a second person before they go live. This module covers both: how a change moves from a draft to your site, and how to look back at earlier versions.

> **Who can do this:** it depends on the step. Anyone with **Add / Edit Content** can edit and submit a change. **Approve Content** is needed to approve it, and **Publish Content** to put it live. Each step below says who it's for.

Versions

Saving a change with **Update** doesn't touch your site. It saves a new **draft** version, and the site keeps showing the last published one until you publish. A page with unpublished changes is listed under **Draft Content** on **Home**, and under the **Draft** heading of its own list.

Turn approvals on

Approvals are off by default: anyone with **Publish Content** can publish a saved change. Turning them on or off needs **Manage Site Configuration**. To require approval:

1. Open **Settings** › **Site Configuration**.
2. Click the pencil beside **CMSWorkflowEnabled**.
3. Change **Value** to `true` and click **Update**.

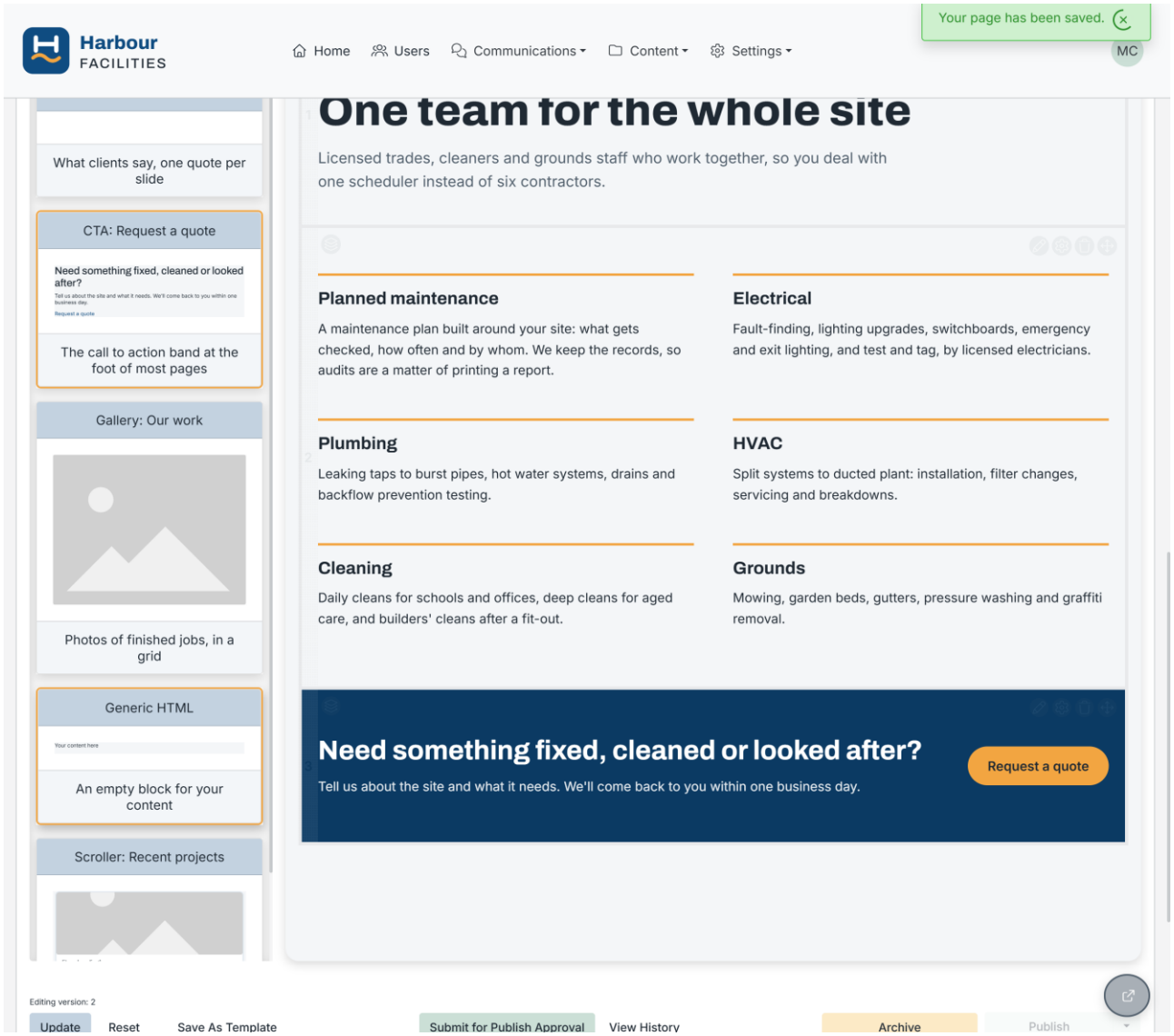
Set it back to `false` to stop requiring approval. See *Site configuration*.

> **Note:** with approvals on, the bin on the lists of pages, blocks, forms and templates disappears, **Publish** stays greyed out until a change has been approved, and **Archive** needs approval too.

Send a change for approval

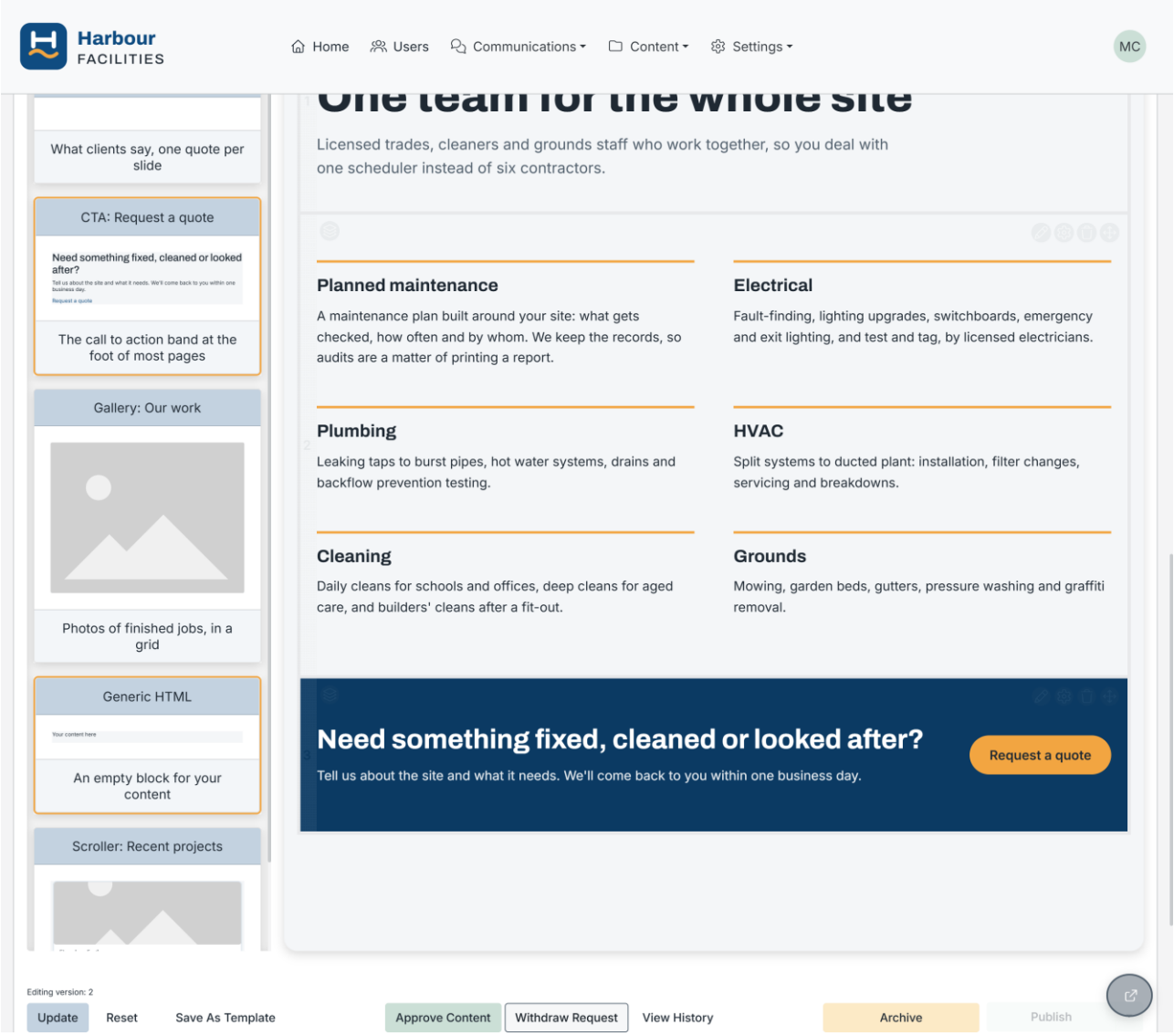
> **Who can do this: Add / Edit Content**.

1. Make your change and click **Update**.
2. Click **Submit for Publish Approval**.



A saved change, ready to send for approval

A message says **Submit for Publish approval completed**, and the button changes to **Approve Content** with **Withdraw Request** beside it. The change is now **pending**.



A change waiting for approval

The wording follows what you're doing. A change to a published item is **Submit for Publish Approval**, so it can replace what's live. To take a published item off the site, click **Submit for Archive Approval**. To bring back an archived one, click **Submit for Re-publish Approval**.

To change your mind, click **Withdraw Request**. The change goes back to being a draft, and you can carry on editing it. The person who made a request can always withdraw it. Anyone else needs **Publish Content**.

Approve a change

> **Who can do this: Approve Content**.

Home lists what's waiting for you under **Pending Approval**.



Home, with a change pending approval

1. Click the pencil on a row, or double-click it, to open the item.
2. Look the change over. **View History** and **Compare** (see below) show what's different.

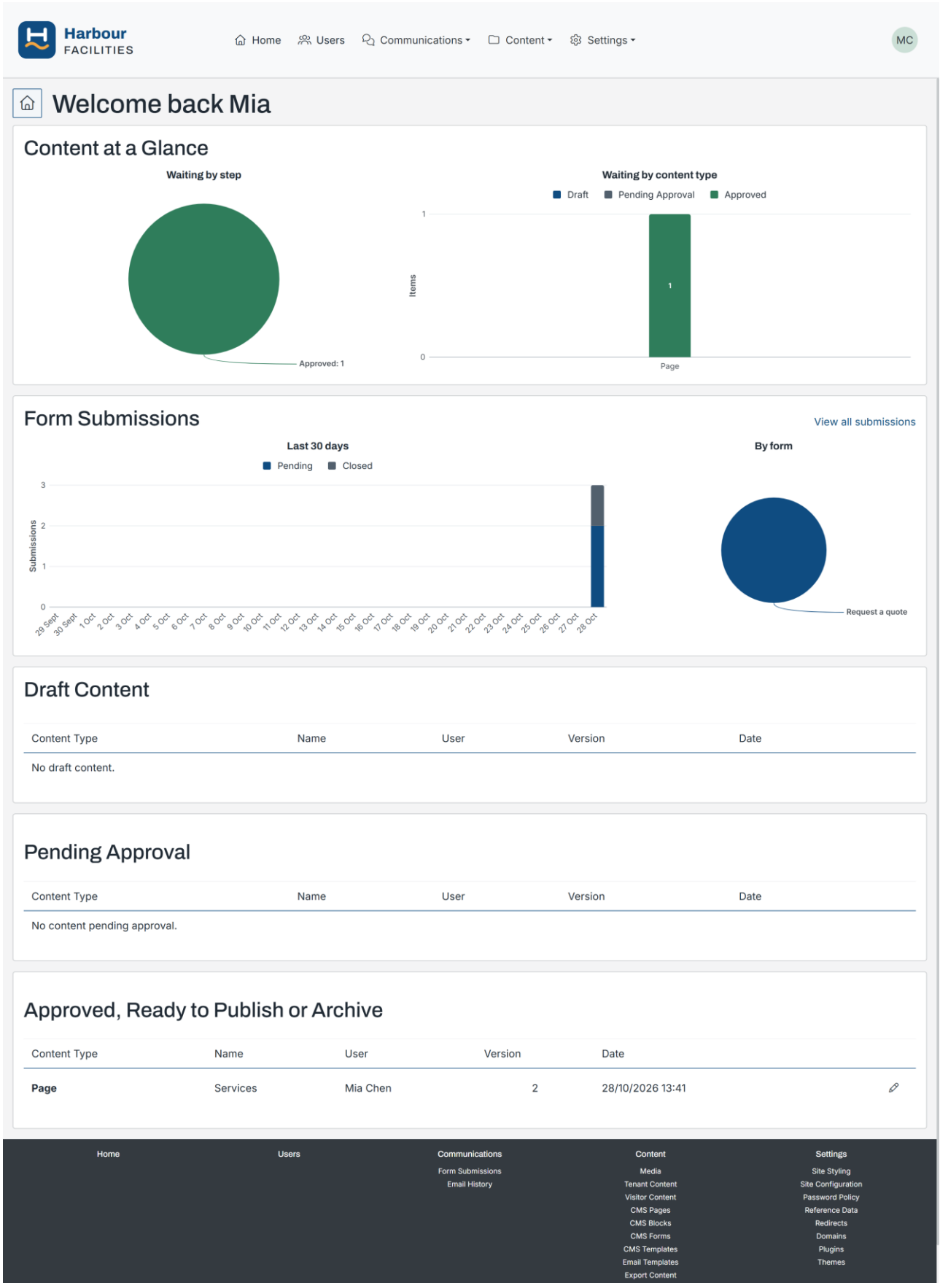
3. Click **Approve Content**.

The change moves to **Approved, Ready to Publish or Archive**.

Publish an approved change

Who can do this: Publish Content.

Under **Approved, Ready to Publish or Archive** on Home, open the item and click **Publish**. Its arrow offers **Schedule Publish**, to choose when it goes live. An approved request to archive is carried out with **Archive** in the same way.

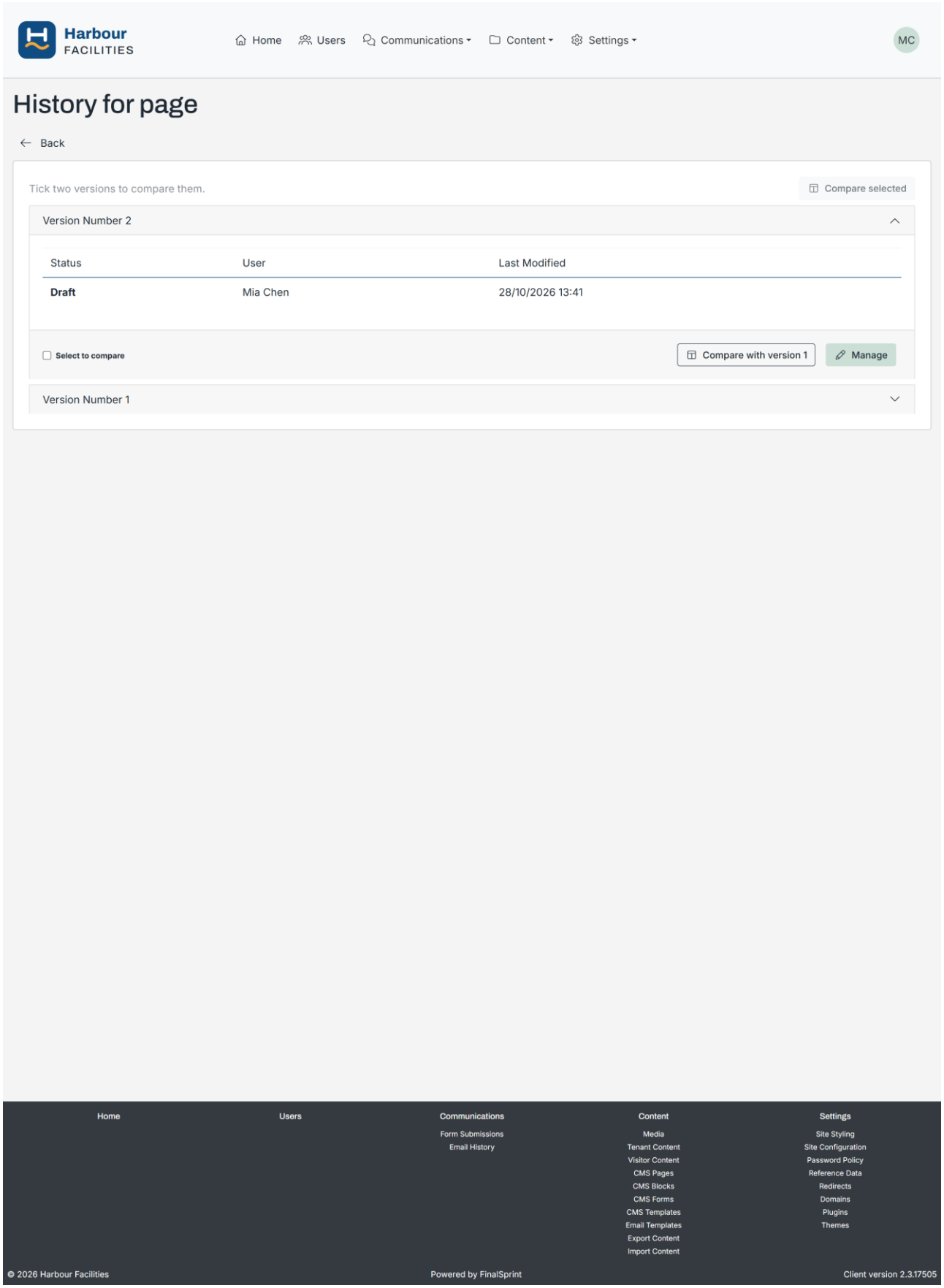


Home, with an approved change ready to publish

> **Note:** each person sees only the tables for the steps they can act on. Someone who can edit but not approve sees **Draft Content** alone.

Version history

Open an item and click **View History**. It appears once the item has more than one version.



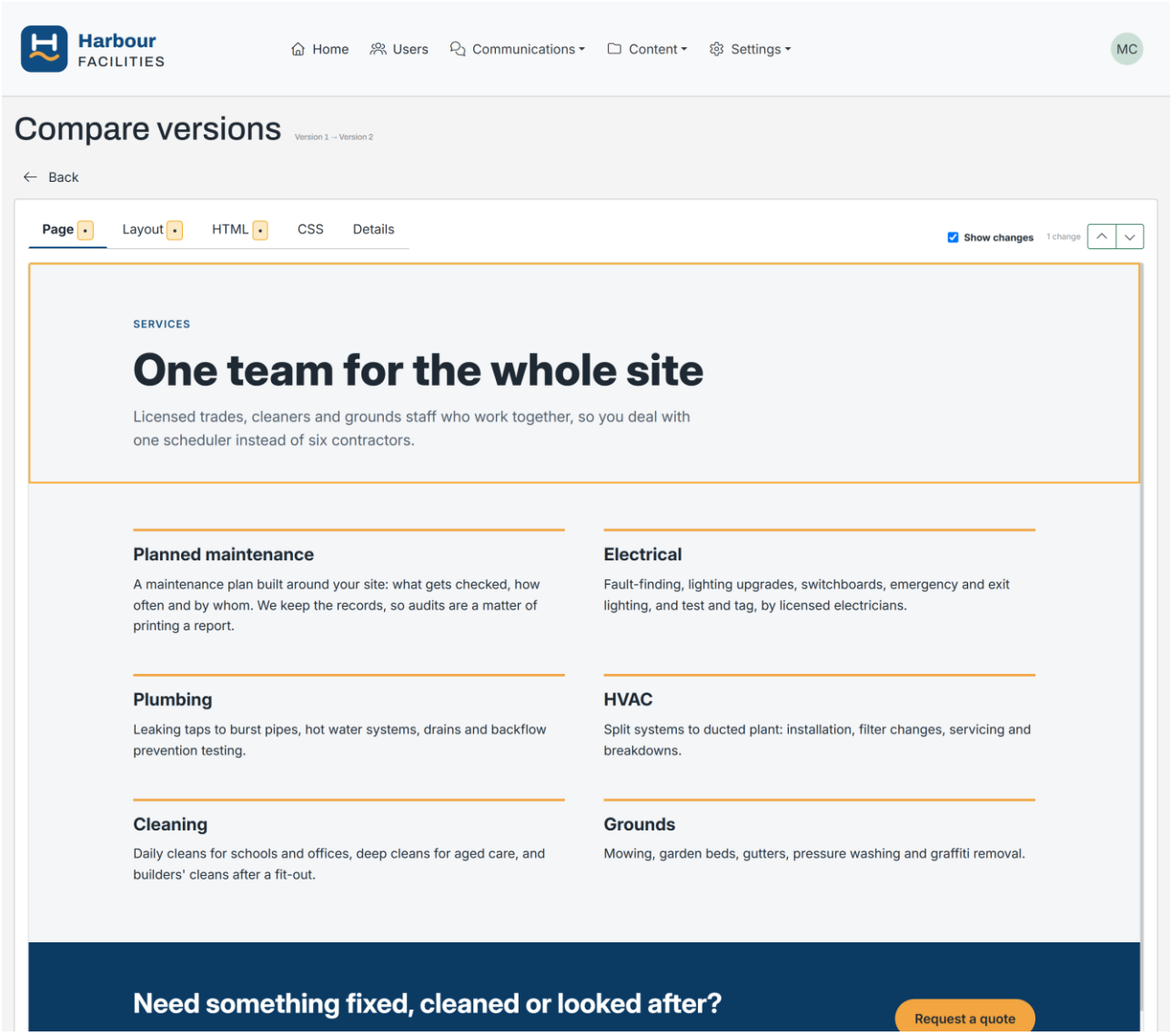
An item's history

Each version has a section, with the newest at the top. Click a version to see what happened to it: its **Status** (such as **Draft** or **Active**), who did it, and when it was **Last Modified**. **Manage** opens that version.

Compare two versions

Compare shows exactly what changed between two versions of a page, block, template or panel.

- On a version, click **Compare with version** *n* to compare it with the one before it.
- Or tick **Select to compare** on any two versions and click **Compare selected**.



Comparing two versions of a page

The screen shows the earlier version leading to the later one in its heading. It has a tab for each kind of change: **Page**, **Layout**, **HTML**, **CSS**, and **Script**, **Settings** and **Details** where they apply. A dot on a tab means that part has changed, and the screen opens on the first one that has.

- **Page** shows the later version as a visitor would see it, with the changes marked: green for **Added**, red for **Removed**, and orange for **Changed style, class or link**. Untick **Show changes** to see it unmarked. Use the arrows to move through the changes one by one.
- **Layout**, **HTML**, **CSS** and the other tabs show the two versions' code, **Side by side** or **Inline**, whichever you choose.

- **Details**, for a page or template, lists what's set on its details rather than in its design: the title, address, tags, **Visible To**, and the meta robots, description and image.

> **Note:** template lists, form responses and forms are shown as placeholders on the **Page** tab, because they fill themselves in from live data.

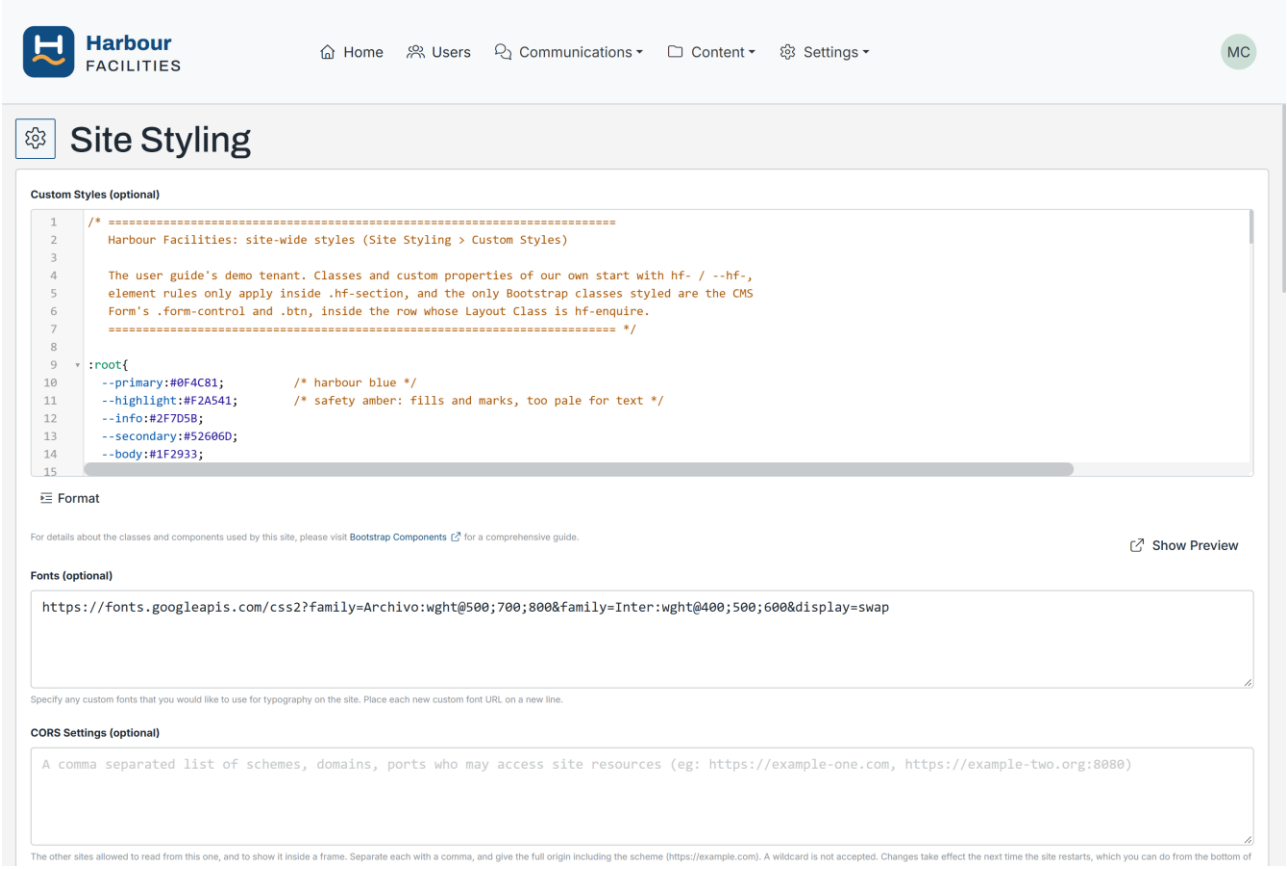
Site styling and themes

Site Styling sets how your public site looks and what it says about itself: its styles, fonts, title, logo and the tracking tools it reports to. **Themes** is a gallery of ready-made looks you can install to start from.

> **Who can do this:** both pages are under **Settings**. Everything on Site Styling from **Fonts** to **Canonical URL** is a site setting, shown only to people with the **Manage Site Configuration** permission; without it the page has the styles, logo and icons. **Delete CMS Content** is only shown to people with the **Reset Content** permission.

Site Styling

Find it under **Settings** › **Site Styling**.

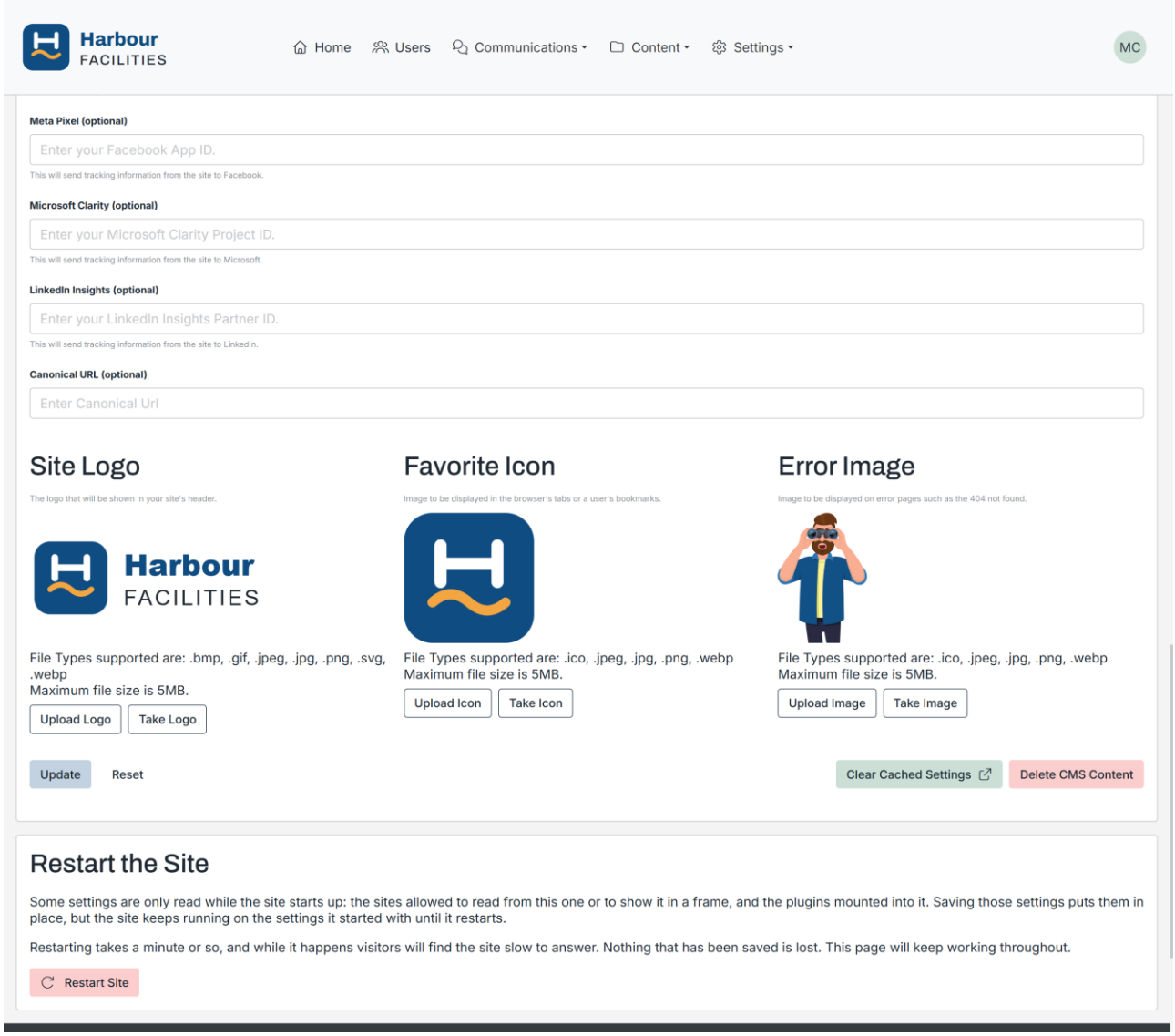


Site Styling

Change what you need and click **Update** at the foot of the page. **Reset** undoes your changes since you opened it.

- **Custom Styles** is the stylesheet for your whole site, written in CSS. Everything on every page can use the classes you define here. **Format** tidies it. **Show Preview** opens a sample page in a new tab, styled with the changes you've typed, before you save them.
- **Fonts** lists web fonts to load, one address per line, such as a Google Fonts link. Then use them in your styles.
- **CORS Settings** lists other websites that may read from your site or show it inside a frame. Give the full address including `https://`, separated by commas. A wildcard isn't accepted. It takes effect the next time the site restarts (see *Restart the site* below).
- **Caption** is a line of text at the very top of your site's header.

- **Site Title** is your site's name, shown in browser tabs and in search results.
- **Meta Description** and **Meta Image** are the summary and picture search engines and social media use for your site, when a page doesn't have its own.
- **Google Site Verification** proves to Google that you own the site.
- **Google Analytics**, **Matomo Analytics Host URL** and **Site ID**, **Meta Pixel**, **Microsoft Clarity** and **LinkedIn Insights** each connect your site to a tracking service. Paste the ID the service gave you. Leave them empty to send nothing. Each one sends information about your visitors to that service, so check what your privacy policy says first.
- **Canonical URL** is the address search engines should treat as your site's main one.



The logo, icons and buttons

Logo and icons

- **Site Logo** is shown in your site's header. Click **Upload Logo** to choose a file (a PNG, JPEG, GIF, SVG, WebP or BMP up to 5 MB), or **Take Logo** to use a camera.
- **Favorite Icon** is the small picture in browser tabs and bookmarks. Use **Upload Icon** or **Take Icon**.
- **Error Image** is shown on error pages such as "page not found". Use **Upload Image** or **Take Image**.

Clear cached settings

The site keeps a copy of its settings so it can answer quickly. Click **Clear Cached Settings** to make it read them again. It opens in a new tab. Do this if a change you saved doesn't appear.

Restart the site

Some settings are only read when the site starts: the websites allowed to read from yours, and the plugins. Saving them puts them in place, but the site keeps running on what it started with until it restarts. Click **Restart Site** at the foot of the page to restart it. It takes a minute or so, and while it happens visitors will find the site slow. Nothing saved is lost.

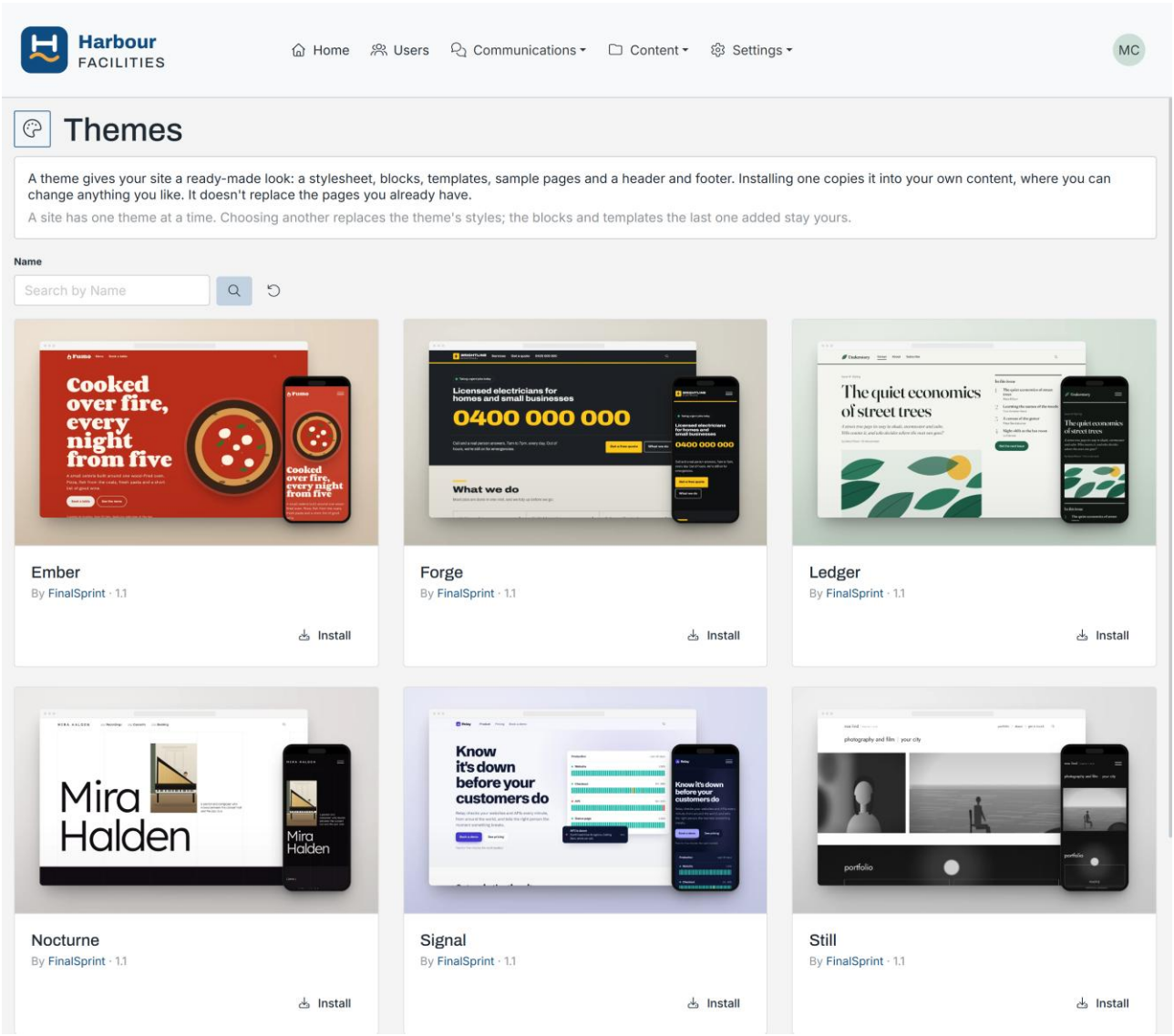
Delete CMS Content

> **Who can do this: Reset Content**.

Delete CMS Content removes all of the site's content and the record of the theme it came from. If you also have **Manage Site Configuration**, the settings on this page go back to empty too. You're asked to confirm, and it can't be undone. Export your content first if you may want it again. See *Export and import*.

Themes

Find it under **Settings** › **Themes**.



The Themes gallery

A theme gives your site a ready-made look: a stylesheet, blocks, templates, sample pages and a header and footer. Installing one **copies** it into your own content, where you can change anything. It doesn't replace the pages you already have. A site has one theme at a time. Choosing another replaces the theme's styles, but the blocks and templates the last one added stay yours.

The gallery shows a card for each theme, with its picture, author, release and description. If you already have one, a line above the cards says which and who made it. Type in **Name** and click the magnifying glass to find one, or the arrow to clear the search. When no themes are offered, the page says **There are no themes to choose from yet.**

Install a theme

1. Click **Install** on the theme's card. (If you already have a theme, the button reads **Switch to this theme**.)
2. Read what it will do. If it replaces another theme, the page says so.
3. Under **Choose what to install**, tick the parts you want:
    - **Styles**, put at the top of your stylesheet. Your own rules come after, so they still win. This is the one part that changes how your site looks straight away.
    - **Blocks** for the designer, and **Templates** for new pages. When the theme has its own header and footer, they come with the blocks.

- **Forms** the theme includes.
- **Sample pages**, as drafts.
- **Menus**, as drafts beside the ones your site shows now, which stay until you publish.
- **The theme's logo**, in place of yours.
- **Fonts**, added to your site's list of fonts.

4. Click **Install** and the theme's name.

If you've changed the theme's section of your stylesheet before, you're warned, because installing replaces it. Tick the box that says so to carry on, or untick **Styles** to keep your own.

The next page lists what to do. The sample pages and menus are **drafts**, so visitors can't see them until you've looked them over and published them. See *Pages* and *Approvals and version history*. The theme's header and footer are published but not shown: your site keeps its own until you choose the theme's on **Visitor Content** › **Header and Footer** (see *Menus, header and footer*), and you can choose your old ones again to go back.

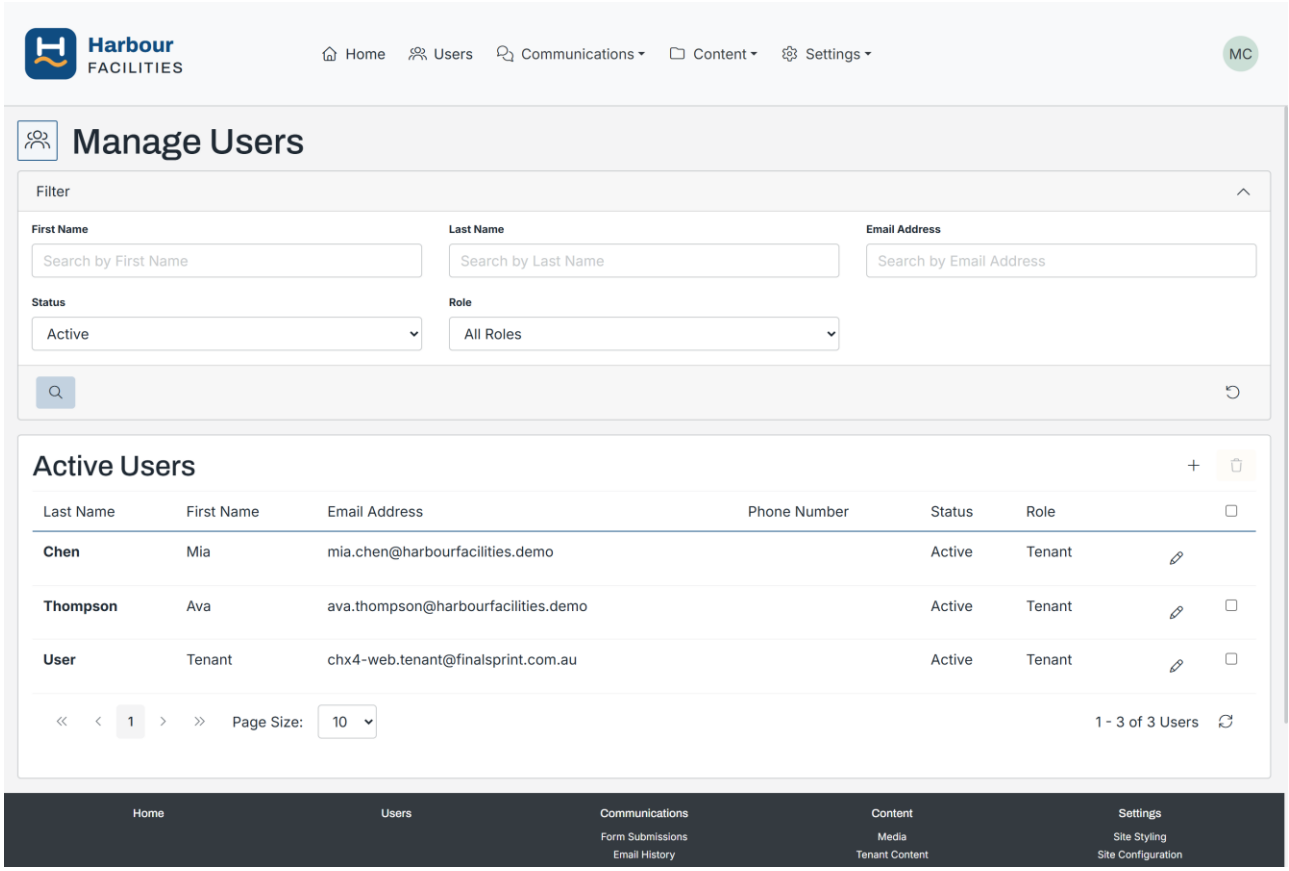
Update a theme

When a theme you use has a newer release, its card shows the old and new release and an **Update to** button. Updating gives the theme's blocks and templates you haven't changed a new version, and its forms a new draft. Your pages, and anything you've changed since installing, are left as they are. Pages keep the version of a block they placed. **Reset Content** on a block in the designer takes the new one.

Users and permissions

Users is where you decide who can log in to the tenant app and what each person is allowed to do. Everyone who runs your site has a login here, with a set of **permissions** that opens up only the parts of the app they need.

> **Who can do this:** anyone who can log in can see the list of users. Changing what a person is allowed to do needs the **Manage Permissions** permission. Find the page under **Users**.



The Manage Users list

Page overview

The list shows each user's **Last Name**, **First Name**, **Email Address**, **Phone Number**, **Status** (**Active** or **Inactive**) and **Role**. Everyone you add is a **Tenant** user. Click a column heading to sort by it.

To look for someone, open **Filter**, and give any of **First Name**, **Last Name** or **Email Address**, a **Status** and a **Role**, then click the magnifying glass. The arrow beside it clears the filter. The list starts on **Active** users. Choose **Inactive** to see people who have been removed.

Add a user

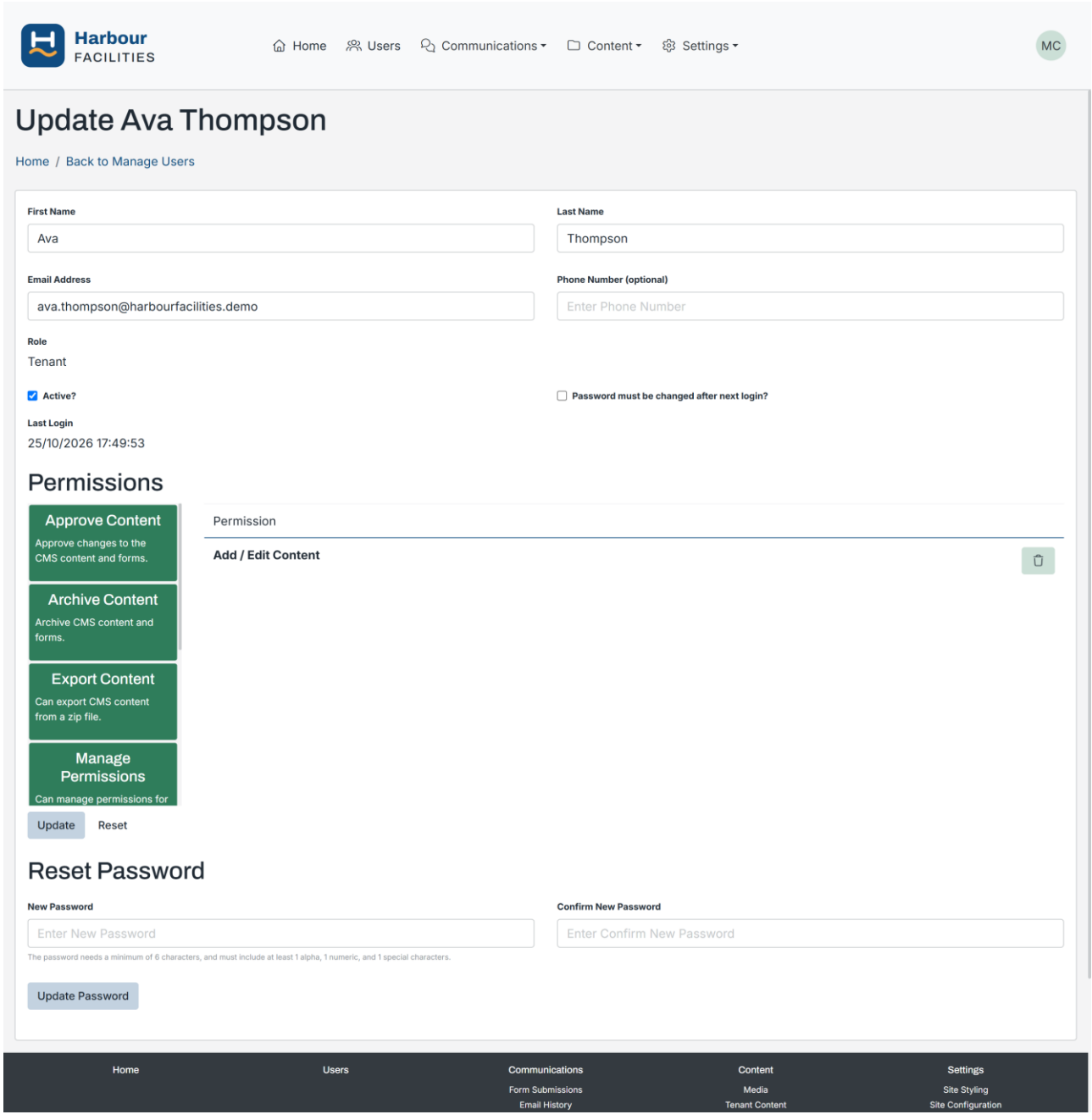
1. Click **+** above the list.
2. Fill in **First Name**, **Last Name** and **Email Address**, and a **Phone Number** if you like.
3. Tick **Active?** and, if the person should choose their own password at first login, **Password must be changed after next login?**.
4. Under **Permissions**, drag each permission the person should have from the list on the left into the table (see below).

5. Set their password under **Reset Password**, and click **Save**.

You can also tell the person to use **Forgot Password?** on the login page, which emails them a code to set their own.

Change a user

Click the pencil on a row, or double-click it.



A user's details

You can change a person's name, phone number and permissions, and untick **Active?** to stop them logging in or tick it to let a removed person back in. Their email address is their login, and their role can't be changed here. Click **Update** to save your changes, or **Reset** to undo them.

Permissions

A permission is a thing a person is allowed to do. A person with none can log in and look around, but can't change anything. The list on the left shows the ones the person doesn't have yet:

Permission	What it lets them do
Add / Edit Content	Create and change pages, blocks, forms, templates, menus and media.
Approve Content	Approve changes that are waiting, when your organisation requires approval.
Publish Content	Put changes live, or schedule them.
Archive Content	Take content off the site, and delete it from the lists.
Export Content	Download the site's content as a zip file.
Reset Content	Delete all of the site's content, and import a replacement.
Manage Permissions	Give other people permissions.
Manage Site Configuration	Open **Site Configuration** and change its settings, and the site's title, fonts, meta tags and analytics on **Site Styling**.

To give a permission, drag it from the list into the table of **Permission**. To take one away, click the bin beside it. Click **Update** to save. Someone without **Manage Permissions** sees the table, but can't change it.

> **Tip:** give people the fewest permissions they need. A writer usually needs only **Add / Edit Content**. Keep **Manage Permissions** and **Reset Content** for the people who run the site.

Reset someone's password

On a user's page, under **Reset Password**, type a **New Password** and **Confirm New Password**, then click **Update Password**. The password has to meet your password policy, shown beneath the box. See *Site configuration*. You can only reset the password of an **Active** user.

Remove a user

Tick the people you want to remove, click the bin above the list, and confirm. Their login stops working, but they aren't erased: choose **Inactive** in the filter to see them. You can't tick yourself.

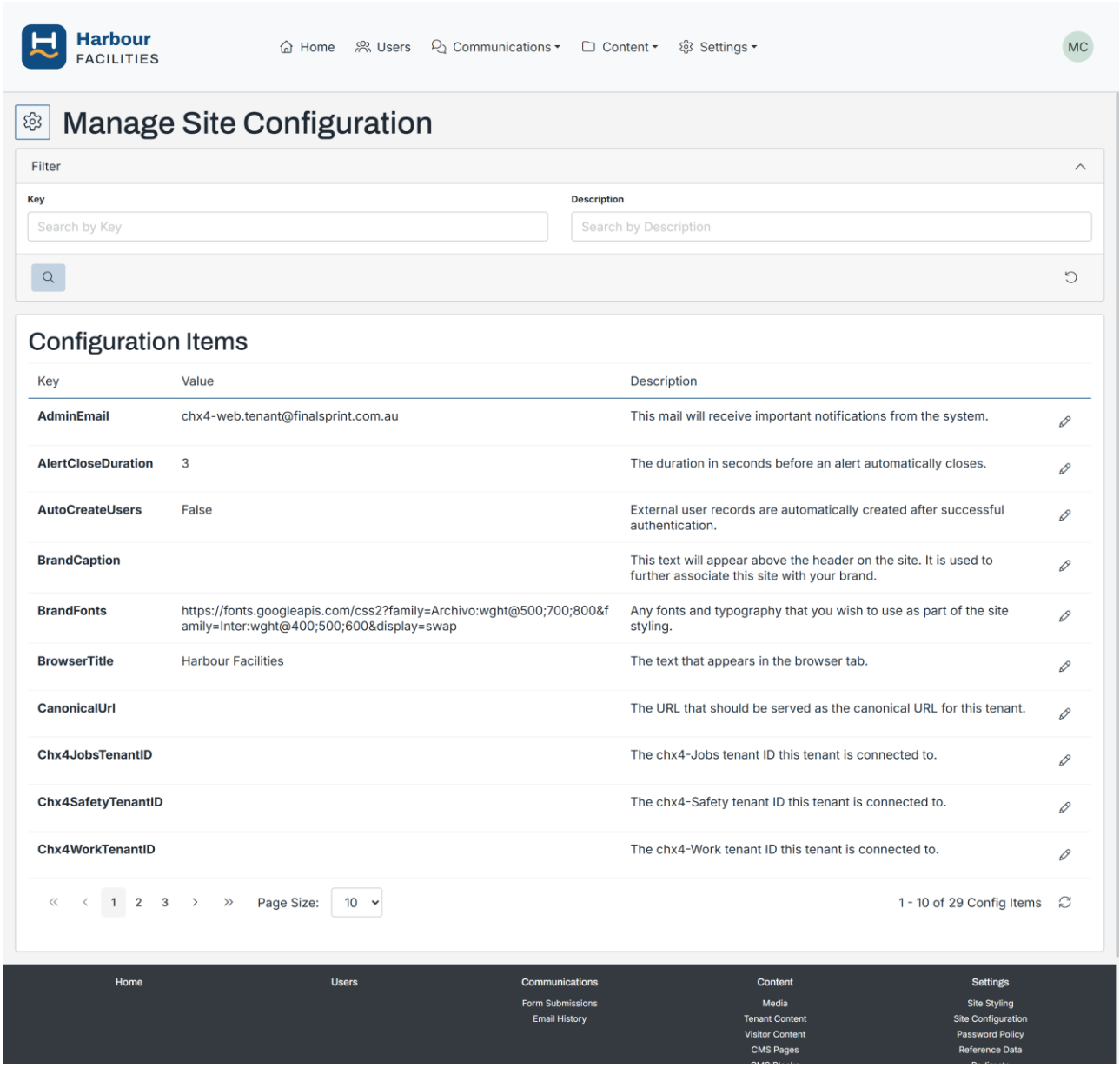
Site configuration

Three pages under **Settings** hold the rules your tenant runs by: **Site Configuration**, **Password Policy** and **Reference Data**. They aren't changed often. This module covers all three.

> **Who can do this: Site Configuration** needs the **Manage Site Configuration** permission, and isn't in the menu without it. **Password Policy** and **Reference Data** are open to anyone who can log in to the tenant app. See *Users and permissions*.

Site Configuration

Find it under **Settings** › **Site Configuration**.



Site Configuration

The page lists your tenant's settings. Each row has a **Key** (the setting's name), its current **Value** and a **Description** of what it does. Click a column heading to sort by it, or open **Filter** and search by **Key** or **Description**.

To change a setting:

1. Click the pencil on its row.
2. Change **Value**. The description beneath says what's expected.
3. Click **Update**, or **Reset** to put the value back.

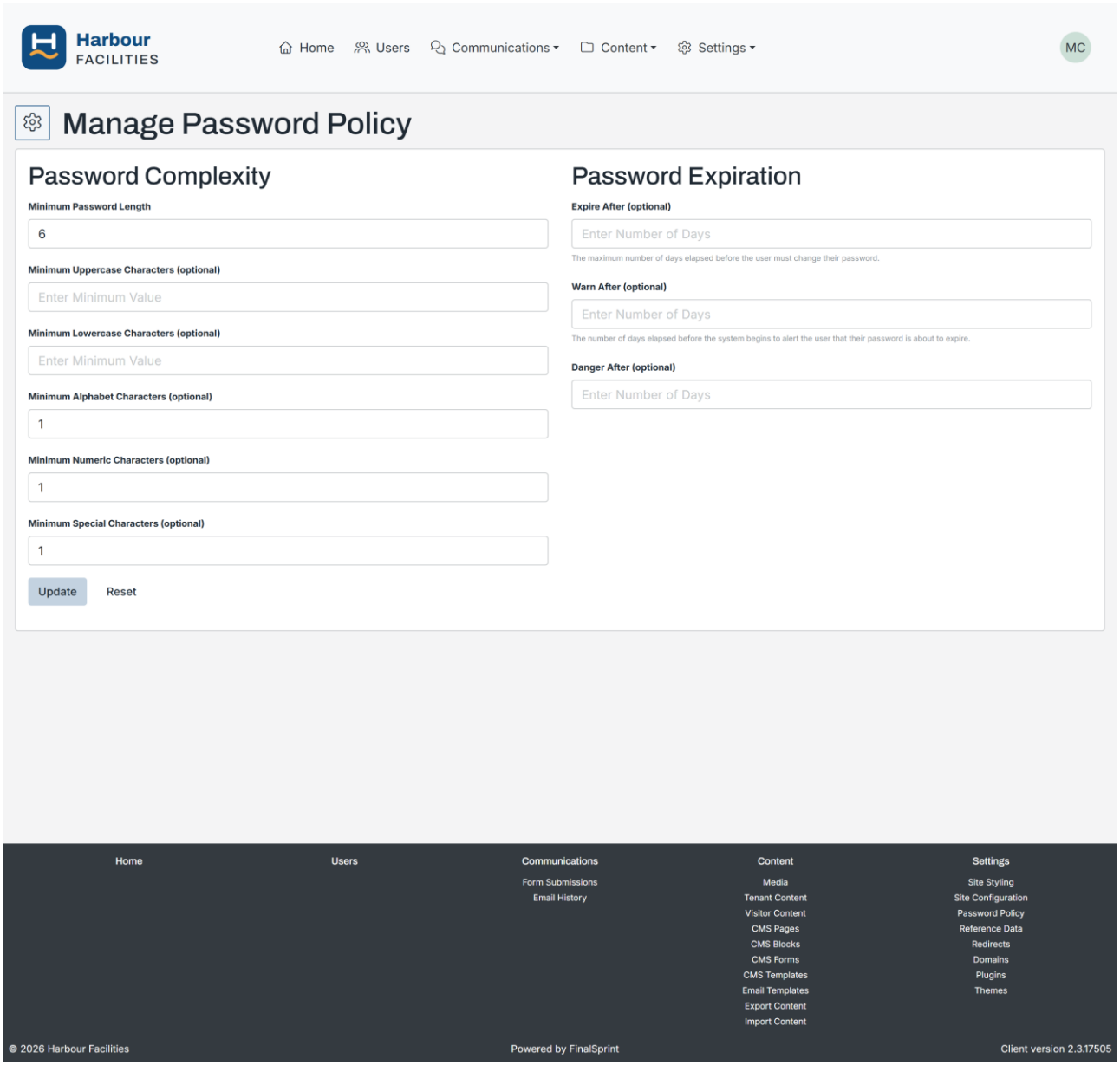
Settings you may want to know about include:

Key	What it does
AdminEmail	Where the system sends important notifications about your site.
AlertCloseDuration	How many seconds a message such as "Your changes have been saved" stays up.
BrowserTitle	The text in the browser's tab.
CMSWorkflowEnabled	`true` makes changes to content need approval before they're published. See *Approvals and version history*.
BrandCaption, **BrandFonts**, **CanonicalUrl**	The same settings you edit, more easily, on **Site Styling**.

> **Note:** a wrong value can stop a feature working. Change settings only when you know what they do, and if you're unsure, ask whoever looks after your site.

Password Policy

Find it under **Settings** › **Password Policy**.



Password Policy

This sets the rules for the passwords the people who log in to the tenant app choose.

Under **Password Complexity**:

- **Minimum Password Length** is how many characters a password must have.
- **Minimum Uppercase Characters**, **Minimum Lowercase Characters**, **Minimum Alphabet Characters**, **Minimum Numeric Characters** and **Minimum Special Characters** are how many of each kind it must include. Leave a box empty for no requirement.

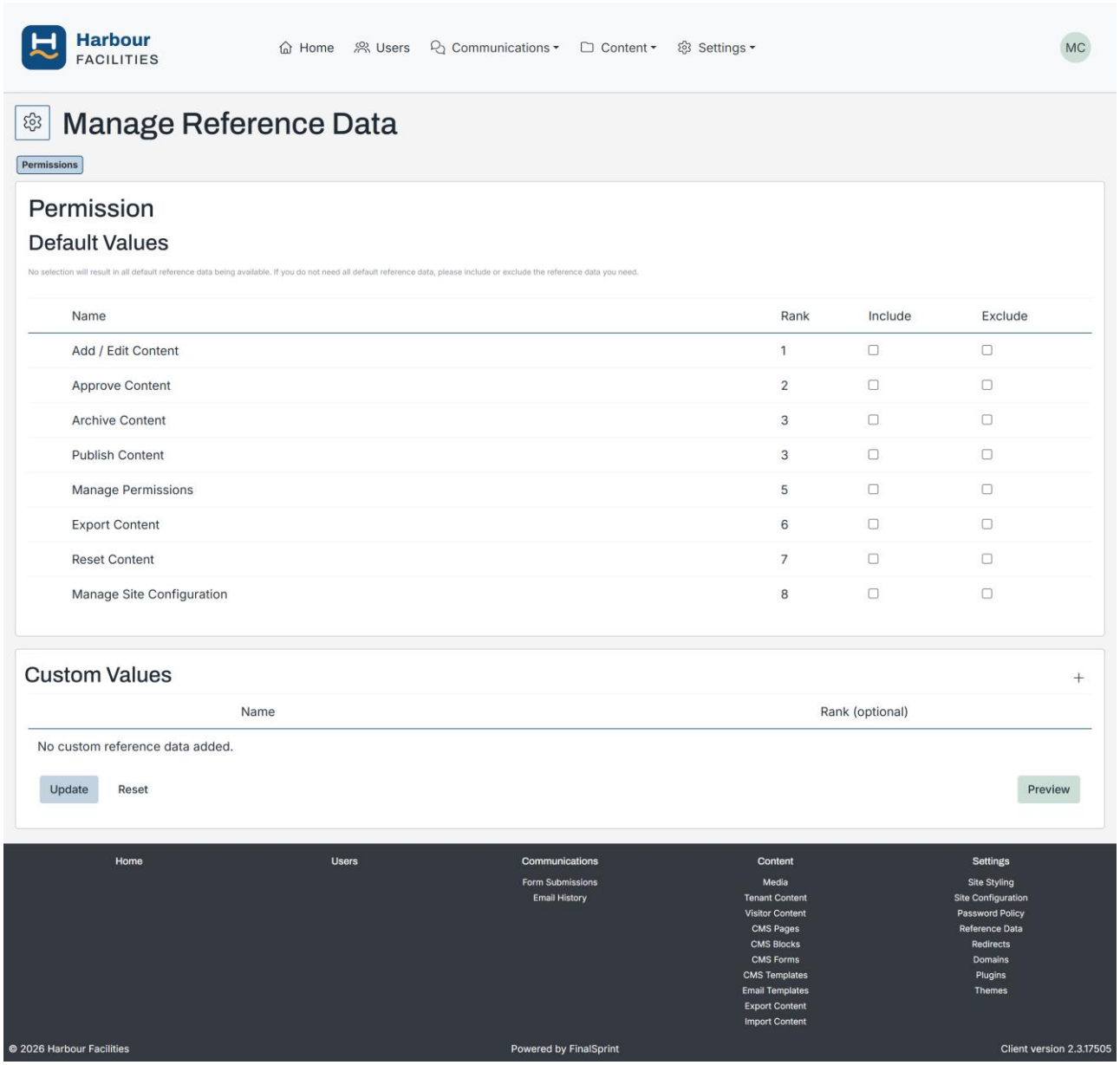
Under **Password Expiration**:

- **Expire After** is the number of days before someone must choose a new password.
- **Warn After** is the number of days before the app starts warning them it's about to expire.
- **Danger After** is the number of days before the warning becomes more urgent.

Click **Update** to save. The rule shows as a sentence under the password box wherever someone sets a password, such as "The password needs a minimum of 6 characters…".

Reference Data

Find it under **Settings** › **Reference Data**.



Reference Data

Reference data is a list of choices used in the app. Today that's one list: **Permissions**, the permissions you can give your users. This page lets you narrow it down or add to it.

Under **Default Values** are the built-in permissions, each with a **Rank**. By default everyone is available. To change that:

- Tick **Include** on the ones you want to offer. Only those will then be available.
- Or tick **Exclude** on the ones you don't want. All the others stay available.

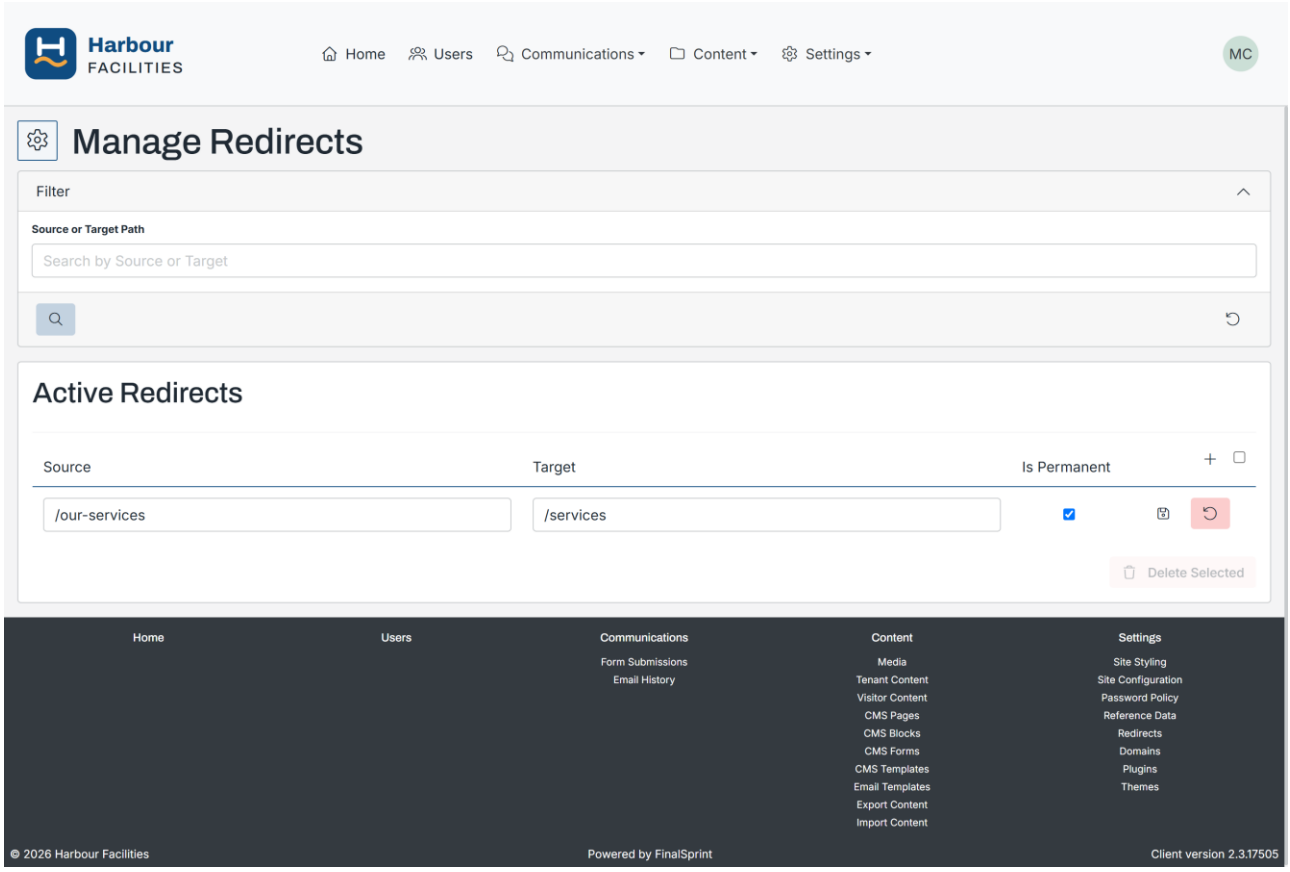
Under **Custom Values**, click **+** to add choices of your own. Each has a **Name** and an optional **Rank**. A rank has to be at least as high as its parent's, and lower than the next one up. The bin removes a custom value that has nothing beneath it.

Click **Update** to save and **Reset** to undo. **Preview** shows the list your changes produce, before you save.

Redirects

A redirect sends visitors who ask for one address on your site to another. Use one when you move or rename a page, so old links, bookmarks and search results still reach it.

> **Who can do this:** anyone who can log in to the tenant app. Find it under **Settings** › **Redirects**.



Redirects, with a new one being added

Page overview

The page lists your redirects, each with a **Source** (the address visitors ask for), a **Target** (where they're sent) and **Is Permanent**. To find one, open **Filter**, type part of its source or target in **Source or Target Path**, and click the magnifying glass. The arrow beside it clears the filter. Click **Source**, **Target** or **Is Permanent** to sort.

Add a redirect

1. Click **+** at the top right of the list. A blank row appears at the top.
2. Type the **Source Path**, the old address, for example `/our-services`.
3. Type the **Target Path**, the new address, for example `/services`.
4. Tick **Is Permanent** if the old address has gone for good. A permanent redirect tells search engines to forget the old address and use the new one. Leave it unticked for a temporary move.
5. Click the disk button (**Save Redirect**). A message says **Redirect has been saved**.

The arrow button at the right of a row you haven't saved cancels it.

Rules for paths

- Paths are only the part after your domain, and start with `/`.
- A path can't end with `/`, except for `/` itself.
- A source can end in `/*` to catch everything beneath it. For example `/design/*` matches `/design/logos` and `/design/colours`. The `*` is only allowed at the very end.
- A target can end in `/*` only when the source does.

A path that breaks these rules shows a message under the box, and can't be saved.

Change a redirect

Edit its source, target or **Is Permanent** in the row, and click **Save Redirect**.

Delete redirects

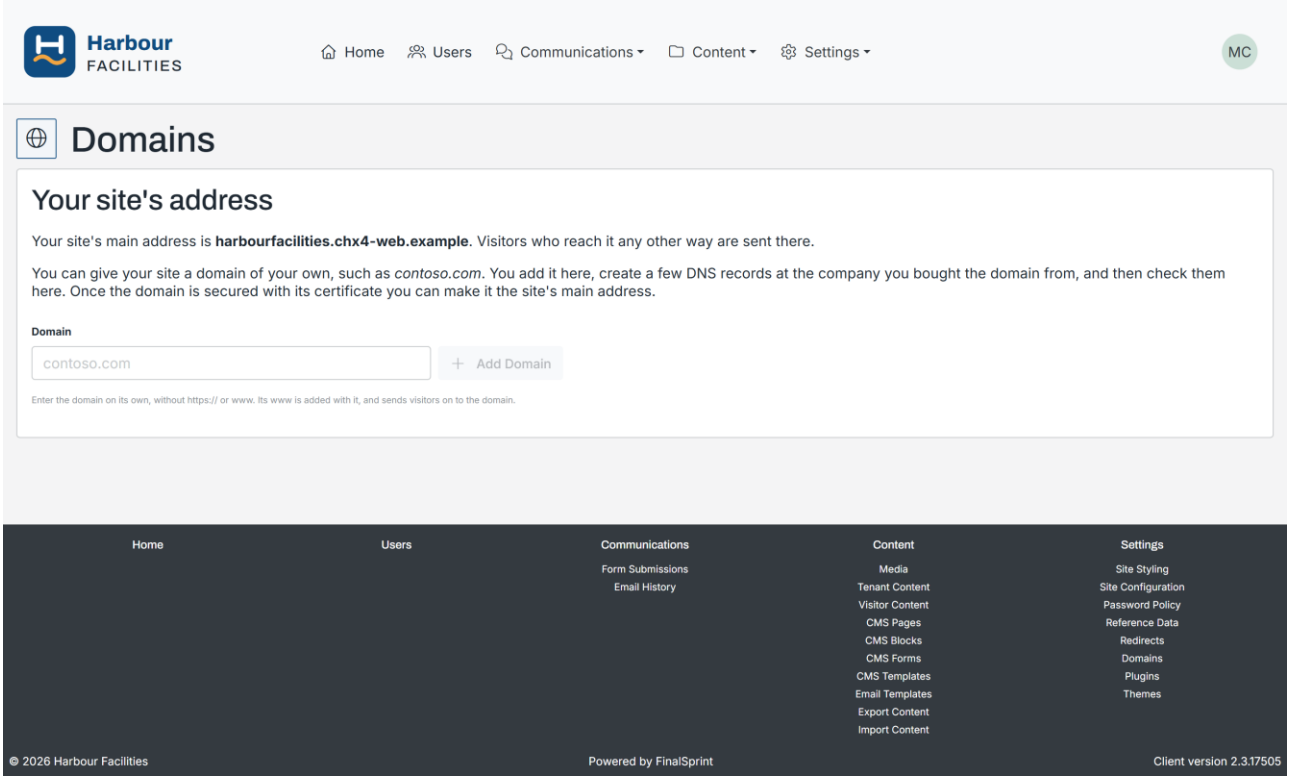
Click the red button on a saved row to remove it. To delete several at once, tick them (or tick the box in the heading to select them all) and click **Delete Selected**.

> **Tip:** when you rename a page in the designer, add a redirect from its old link to the new one, so any links already out there keep working.

Domains

Your site starts out with an address we give it. **Domains** lets you give it a web address of your own, such as `contoso.com`, so visitors reach your site there, with a secure padlock.

> **Who can do this:** anyone who can log in to the tenant app. Find it under **Settings** › **Domains**. You'll also need to be able to change DNS records, at the company where you bought the domain.



Domains

> **Note:** adding a domain sets up real services and certificates for it. Add only a domain you own and mean to use.

Page overview

The top of the page says what your site's **main address** is. Visitors who reach your site any other way are sent there. Beneath it you can add a domain, and each domain you've added has a panel of its own.

Add a domain

1. Type your domain in **Domain**, on its own. Leave off `https://` and `www`. For example, `contoso.com`.
2. Click **Add Domain**.

The `www` version of your domain is added for you, and sends visitors on to the domain itself. The domain's panel appears with the status **Waiting for DNS records**.

Create the DNS records

The panel lists **five records** to create where your domain's DNS is managed, usually at the company you bought the domain from. Each shows its type, its name, what it's for and the value to enter. The copy button beside a value copies it, since it has to be entered exactly.

Providers differ. Many add your domain to the end of a name for you, and print it after the name box. If yours does, enter the short name shown in bold. The page tells you which. An `@` means the domain itself, and some providers want that left blank.

When you've created them, click **Check Records**. New records can take up to an hour to be seen, so come back and check again if they aren't found yet.

Wait for certificates

Once the records are right, the status changes to **Getting certificates**. Your domain is set up on your site and is getting its security certificates, which usually takes a few minutes. Click **Check Again** until the status is **Active**.

Make it your main address

When a domain is **Active**, your site answers at it and at its `www` address, each with its own certificate. Click **Make Main Address** to make it the address your site is known by. Every other address then forwards to it.

The site restarts when you do this, which takes about a minute. The page says when it's done. Because you're signed in at the old address, you'll need to sign in again at the new one: click **Sign in at** the new address.

> **Note:** leave the DNS records in place. Removing them takes the domain off your site.

The main address has a **Main address** badge. **DNS records**, under each active domain, shows its records again.

Go back to the default address

If you want to go back to the address we gave your site, for example if your domain's DNS has gone wrong, click **Use Default Address** near the top of the page. It's only shown while some other address is the main one.

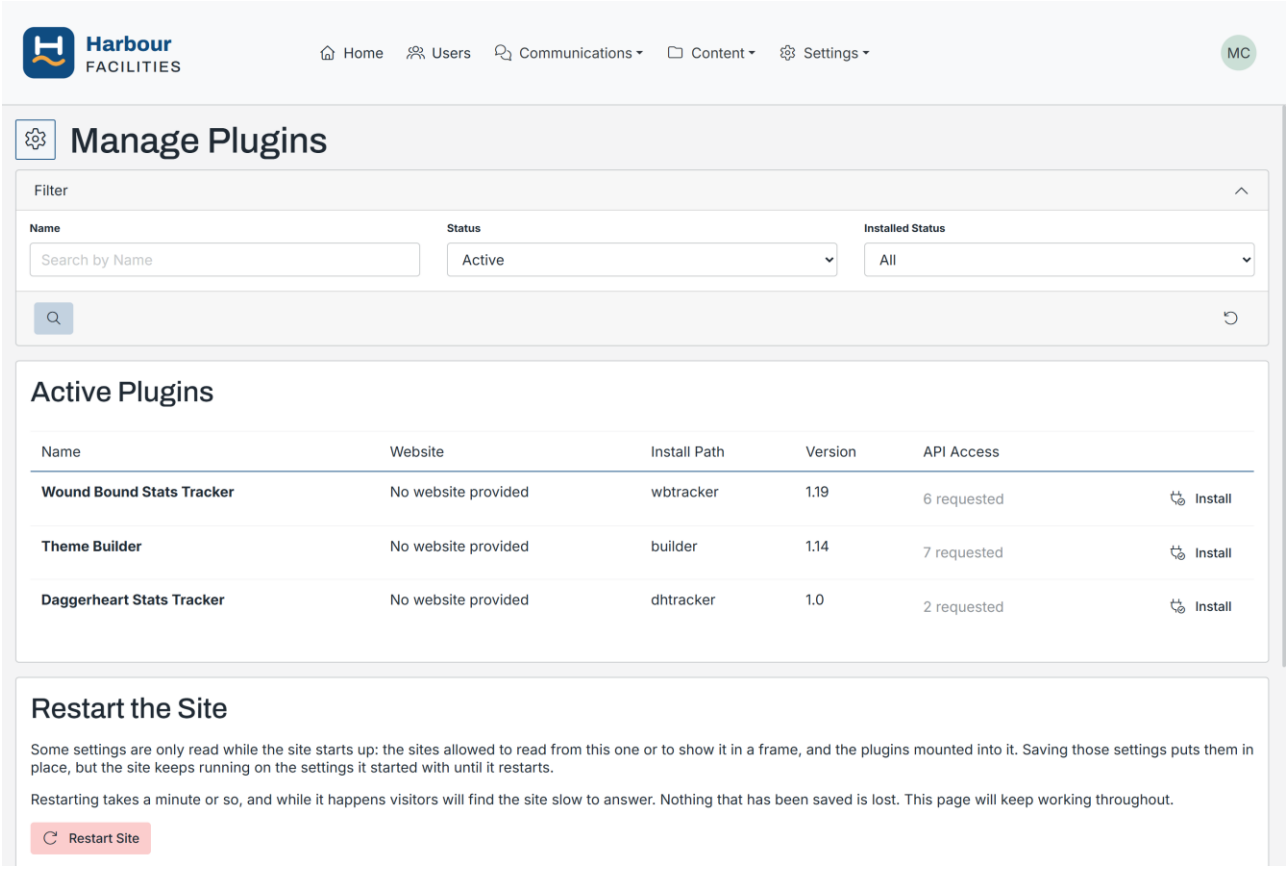
Remove a domain

Click **Remove Domain** on the domain's panel. You can't remove the main address: make another address the main one first, with **Use Default Address**. After removing it, delete its DNS records too.

Plugins

A plugin is an extra feature, built by FinalSprint or someone else, that you add to your site, such as a tracker or a builder. It has pages of its own, which you open from the list. **Plugins** is where you install, update and remove them, and decide what each is allowed to do on your behalf.

> **Who can do this:** anyone who can log in to the tenant app. Find it under **Settings** › **Plugins**.



Plugins

Page overview

The list shows the plugins on offer, each with its **Name**, **Website**, **Install Path** (where its pages live on your site), **Version** and **API Access**. **API Access** says how many capabilities the plugin has asked for, such as **6 requested**, or what you've agreed to.

To find one, open **Filter**, type part of its name in **Name**, choose a **Status** (**Active**, **Pending** or **Inactive**) and an **Installed Status** (**All**, **Installed Only** or **Not Installed**), and click the magnifying glass. The arrow beside it clears the filter.

Install a plugin

Click **Install** at the right of the plugin's row. A message says **Plugin has been installed**. If the plugin asks to call the API on your behalf, a dialog opens straight away so you can decide what to allow (see below).

Plugins are mounted into the running site when it starts, so if a plugin doesn't work straight away, use **Restart Site** at the foot of the page. Restarting takes a minute or so, and visitors will find the site slow while it happens. Nothing saved is lost.

Open a plugin

Click the rocket on an installed plugin’s row to open it.

Decide what a plugin may do

Some plugins ask to read or save data on your site’s behalf. They can’t do it until you agree. Click the key (**Manage API Access**), or answer the dialog that opens when you install one.

The dialog, **API Access** with the plugin’s name, lists the plugin’s **Capabilities** as tick boxes. Tick only the ones you’re happy to give it, and click **Grant Access**. Choose **Not Now** to decide later. What you agree to applies to everyone the plugin signs up. You aren’t asked again for each of them.

To change your mind, open the dialog again and either change the ticks and click **Save Changes**, or click **Withdraw Access**.

> **Tip:** give a plugin the fewest capabilities it needs.

Update a plugin

When a newer version is available, its row shows **Update** and the new version. Click it. A message says **Plugin has been updated to** the new version.

Remove a plugin

Click the **Remove Plugin** button on an installed plugin’s row.

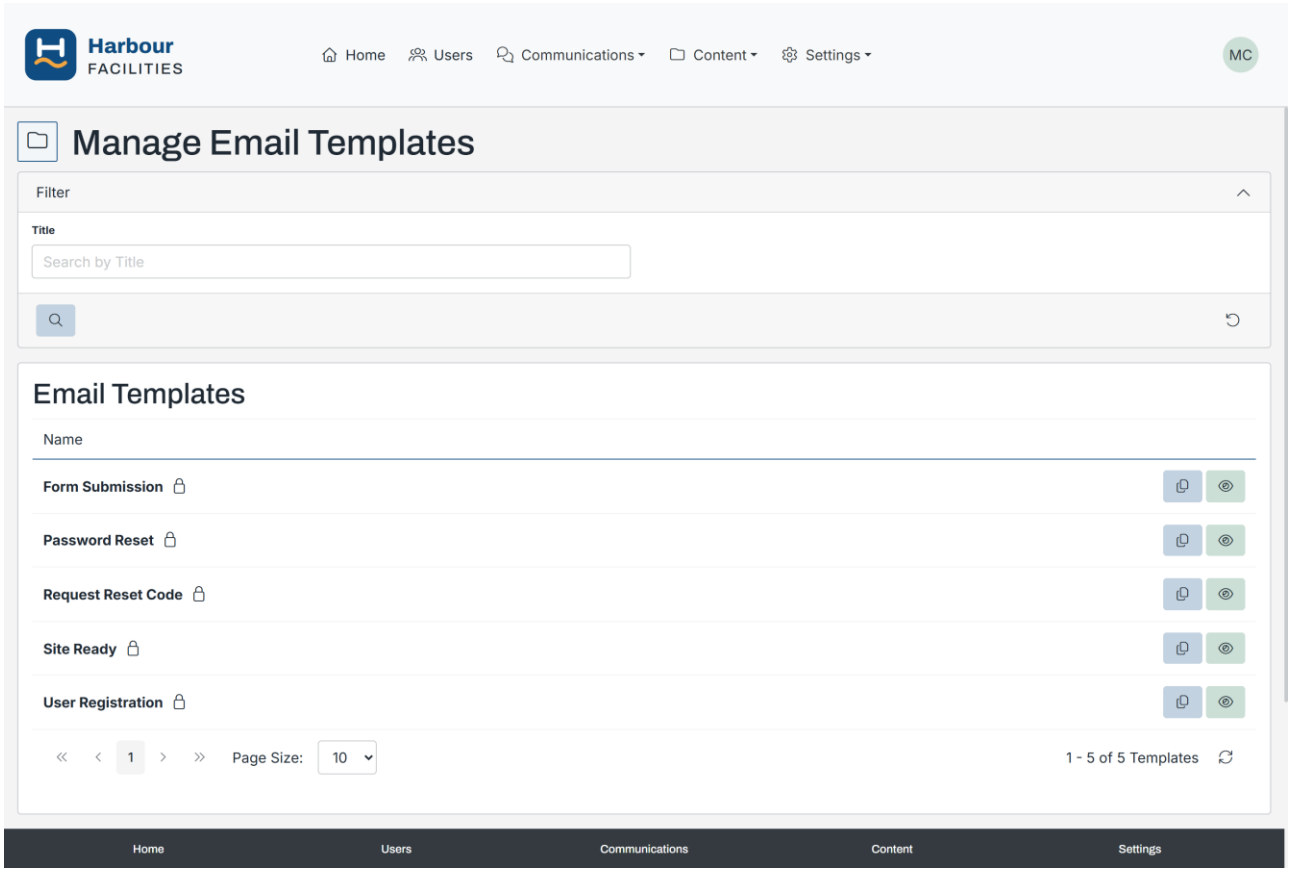
If you had allowed the plugin to save data, you’re warned first, because removing it **permanently deletes everything it has saved**, including files it uploaded. Pages that link to those files will stop showing them, and installing the plugin again won’t bring the data back. Click **Yes, uninstall and delete its data** only if you’re sure.

Email templates and history

chx4-Web sends emails for you: the notice that a form was submitted, the email that sets a password, and a few more. **Email Templates** holds what those emails say. **Email History** is a record of the emails that have been sent.

> **Who can do this:** anyone who can log in to the tenant app. Find them under **Content** › **Email Templates** and **Communications** › **Email History**.

Email templates

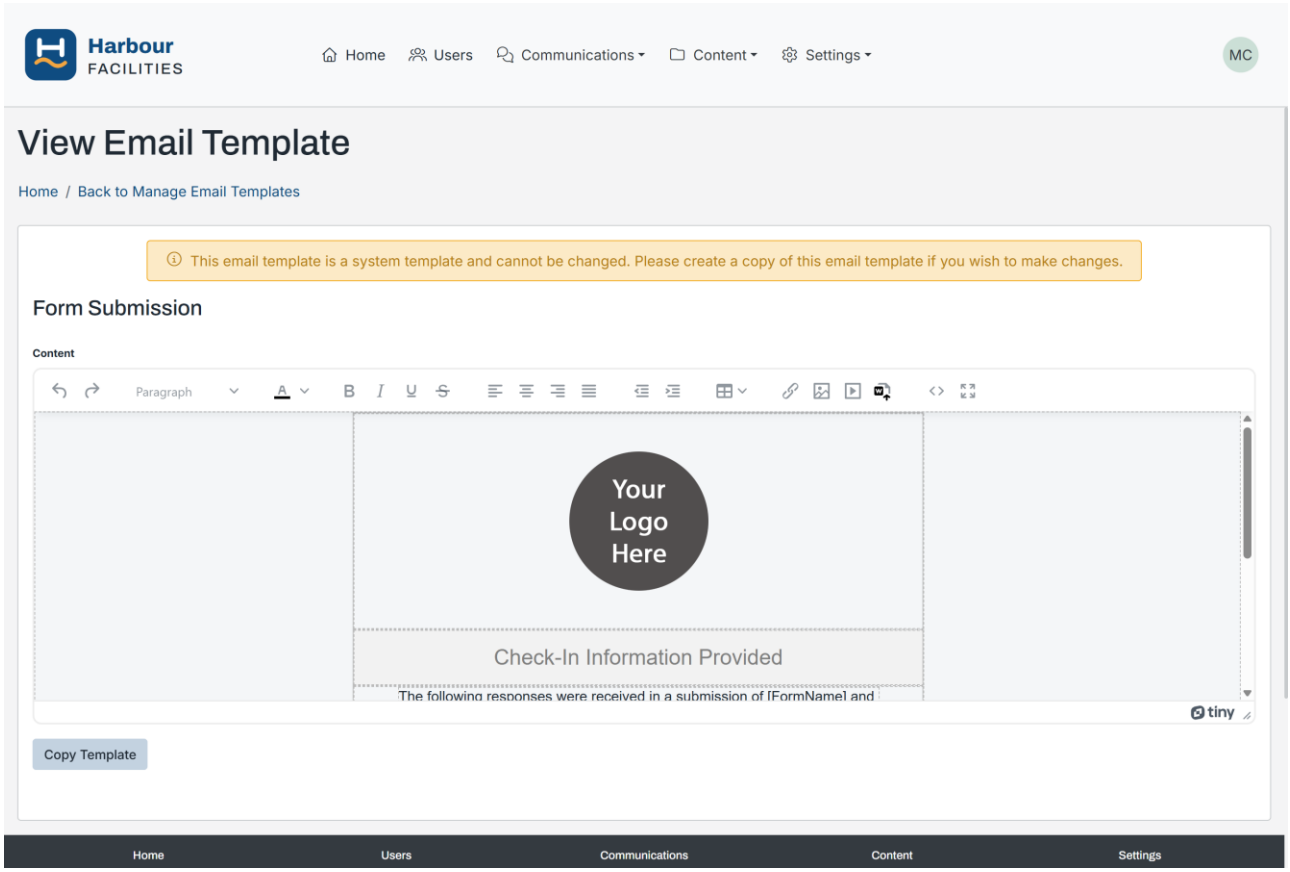


Email Templates

The list shows each template's **Name**. The padlock marks a **system template**, one that comes with chx4-Web: **Form Submission**, **Password Reset**, **Request Reset Code**, **Site Ready** and **User Registration**. To find one, open **Filter**, type part of its title in **Title**, and click the magnifying glass. The arrow beside it clears the filter.

Look at a system template

Click the eye on a row. A system template opens read-only, with a note that it **cannot be changed**.



A system template

Its **Content** is the email as people receive it, in the same editor as the rest of the app. Words in square brackets, such as `[FormName]`, are filled in when the email is sent.

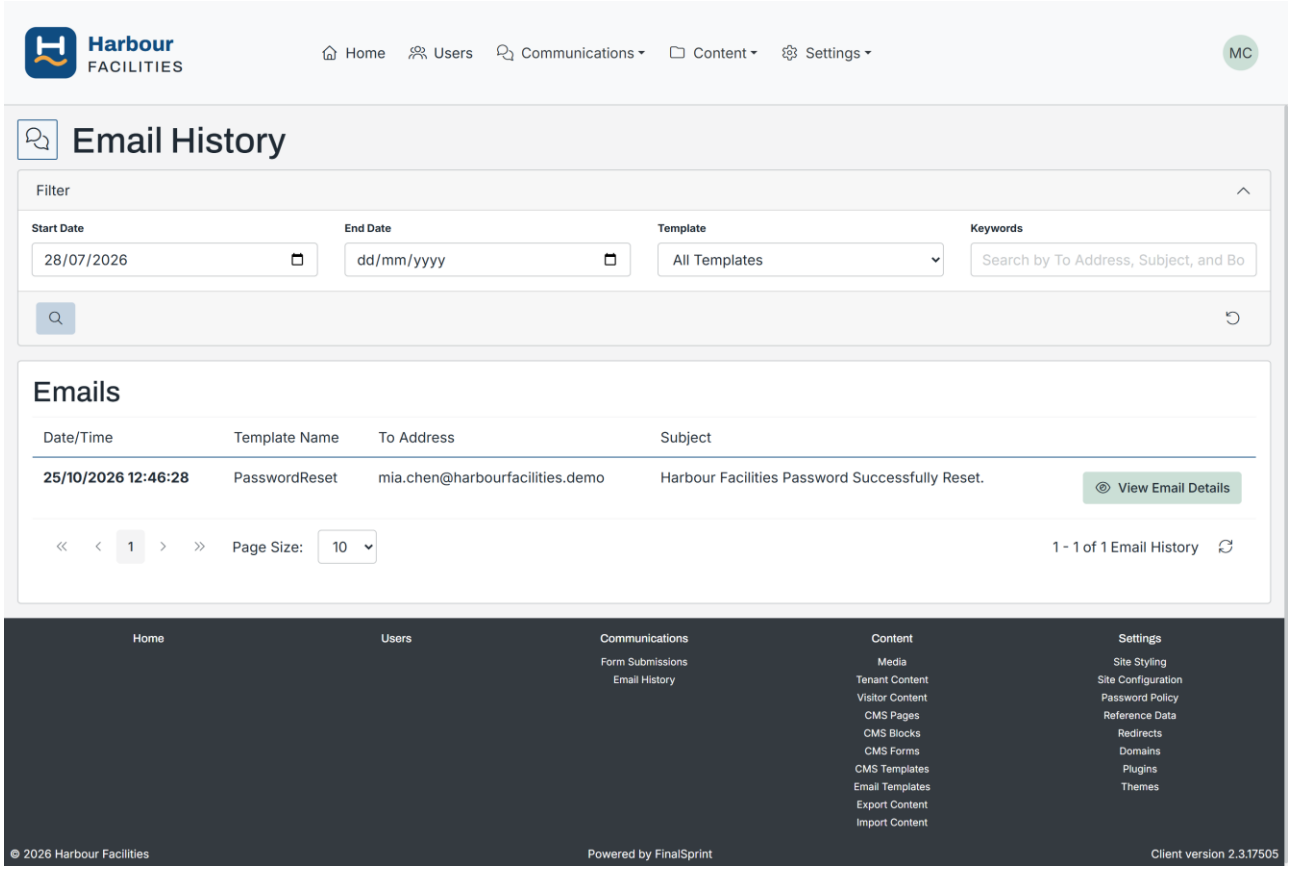
Make your own version

You can't change a system template, but you can change a copy of one.

1. Click the copy button on its row (**Copy as new Email Template**), or **Copy Template** on its page.
2. Change the **Content**: swap the logo for yours, and reword anything you like. Keep the words in square brackets, so each email still gets its details filled in.
3. Click **Save**.

Your copy appears in the list without a padlock. Click the pencil on it to change it, with **Update** to save and **Reset** to undo. **Delete** removes it.

Email history



Email History

Email History lists the emails sent for your site, newest first: the **Date/Time**, the **Template Name** it was made from, the **To Address** and the **Subject**.

To find emails, open **Filter** and choose any of:

- **Start Date** and **End Date**.
- **Template**, or **All Templates**.
- **Keywords**, which are matched against the address, the subject and the body.

Then click the magnifying glass. The arrow beside it clears the filter. The page starts with **Start Date** set to today.

Click **View Email Details** on a row to see **Email Date Time**, **Template Name**, **Subject**, **From Address**, **To Address** and the **Content** of the email as it was sent.

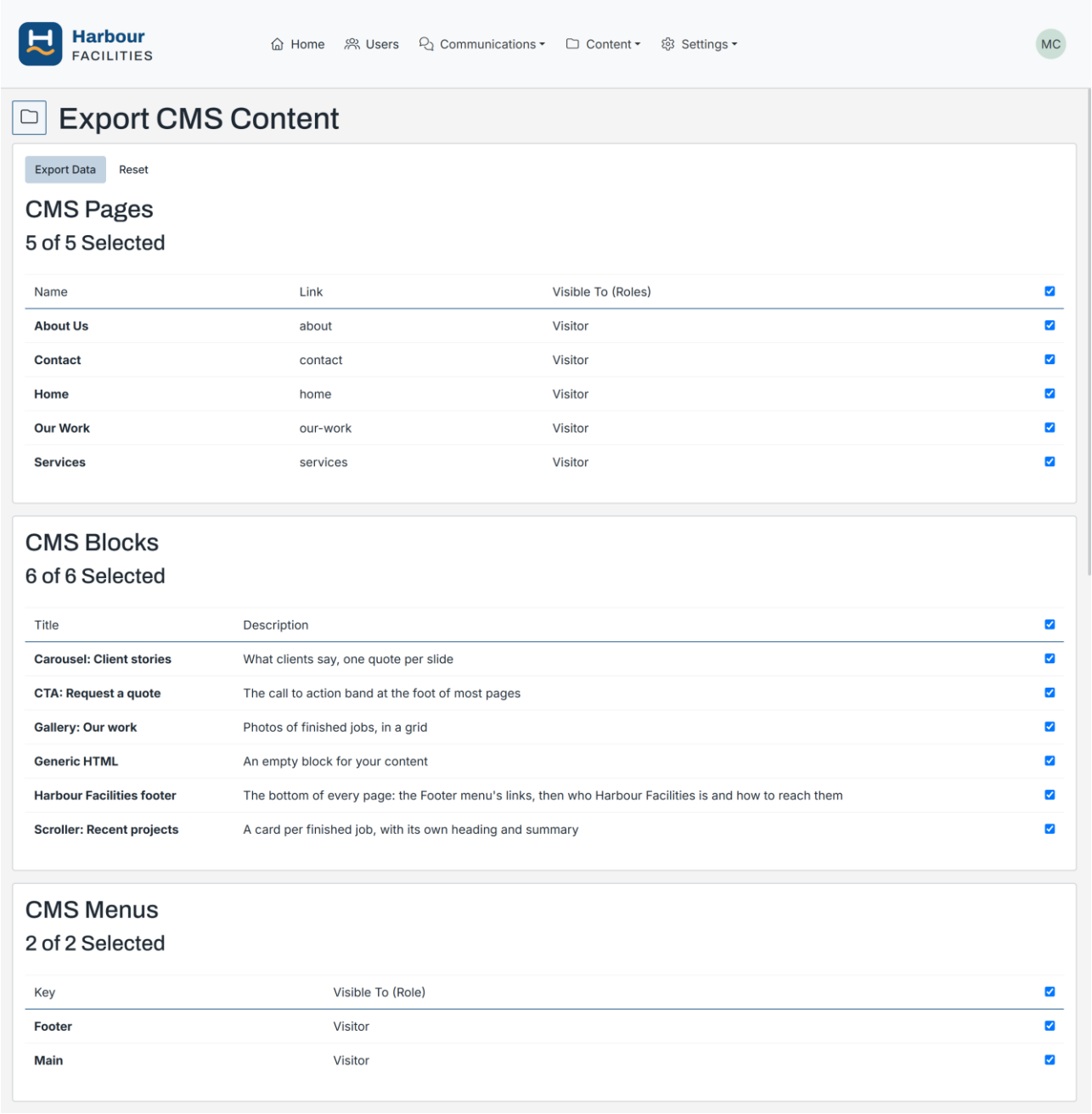
> **Tip:** if someone says they never received an email, check here first. If it's listed, it was sent, so ask them to look in their junk folder.

Export and import

Export Content packs your site's content into a single zip file. **Import Content** loads such a file into a site. Use them to keep a backup of your content, to copy a site's content to another site, or to load a site that was designed for you.

> **Who can do this:** you need the **Export Content** permission to export, and the **Reset Content** permission to import. Find them under **Content** › **Export Content** and **Import Content**.

Export your content



Export CMS Content

The page lists everything that can be exported, in sections: **CMS Pages**, **CMS Templates**, **CMS Blocks**, **CMS Menus**, **CMS Panels**, **CMS Forms** and **CMS Media Files**. A section appears only when the site has something of that kind. Each says how many are selected, such as **4 of 4 Selected**.

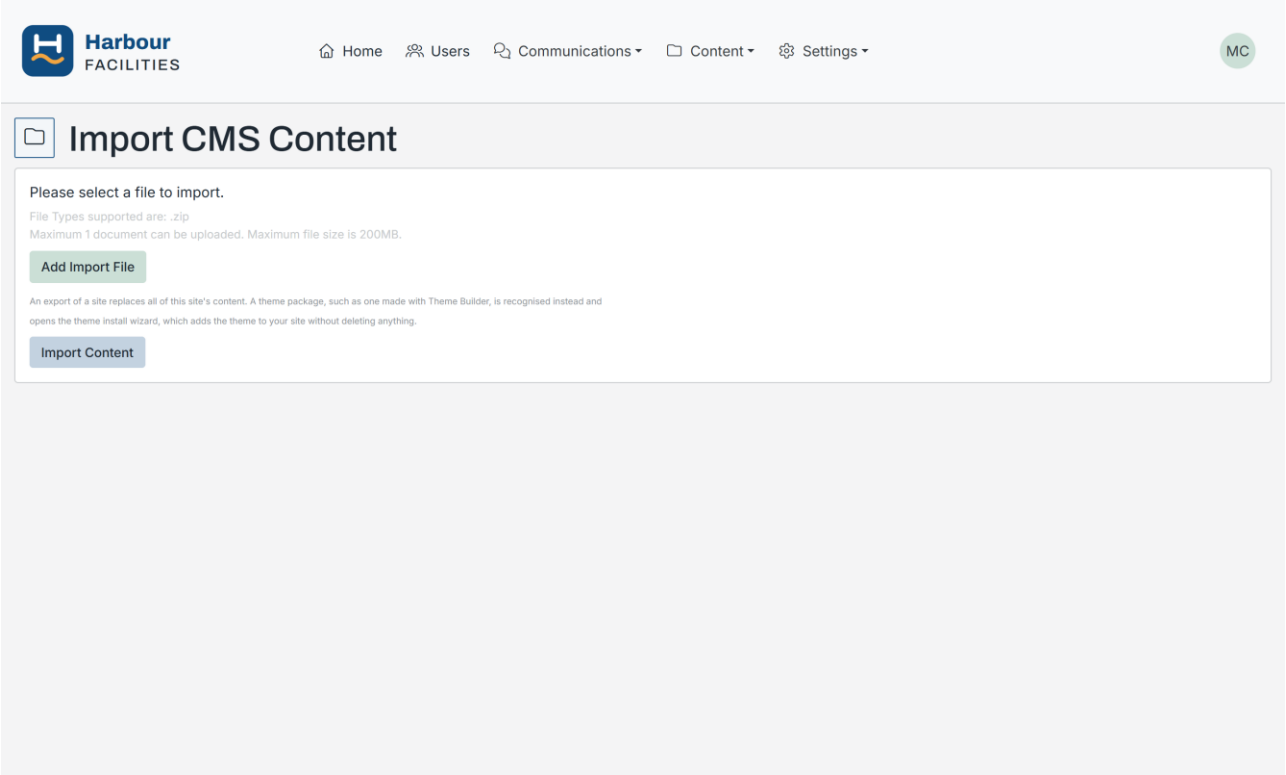
Everything starts selected.

1. Untick anything you don't want in the file. The box in a section's heading ticks or unticks all of that section. Click a column heading to sort a section.
2. Click **Export Data**.
3. A message says **CMS Content successfully exported**, and your browser saves the zip file.

Reset puts the ticks back to how they started.

> **Tip:** export before you make big changes, and keep the file somewhere safe. The file can be imported again to put the content back.

Import content



Import CMS Content

> **Important:** importing a site **replaces all of the site's content**. Everything the site has now is deleted first. Export what you have before you import.

1. Click **Add Import File** and choose a `.zip` file, up to 200 MB. It must be a file made by **Export Content**, or one made for the purpose by FinalSprint.
2. Click **Import Content**.
3. A box asks **Confirm Import**: "This will delete all existing CMS content for this tenant. Are you sure you want to proceed?" Click **Yes** to carry on.
4. Wait. The page says **Please be patient. This process could take a while.** Your file is checked before it's read, which takes longer for a big one. Don't leave the page.
5. A message tells you the import is complete.

If you click **Import Content** without choosing a file, the page says **Import file is missing**.

Theme packages

A theme package, such as one made with Theme Builder, is recognised and doesn’t replace anything. It opens the theme install wizard, which adds the theme to your site without deleting anything. See *Site styling and themes*.

Styling your site: notes for designers

This module is for whoever writes a site's styling: a designer or agency working for the site, or someone on its own team who writes CSS. It says how the styling of a chx4 web site is put together, so that your work fits it, survives the site's people editing their pages, and keeps working in the site's dark version and through theme updates. Unlike the rest of this guide, it assumes you know CSS.

If you're making a look that any chx4 web site could install, make it as a theme in Theme Builder instead, which has its own guide (see *Designing your site*). Everything here applies to a theme too.

Where the styling goes

CSS	Goes in	Reaches
The site's palette, fonts, and everything shared between pages	**Custom Styles**, on Settings › Site Styling	Every page
One block's own styling	The block's **Block Specific CSS** (see *Blocks*)	Every page the block is placed on: it's copied into the page with the block
One page's own styling	The page's **Page CSS** tab in the designer	That page
The header or the footer	The Site Header or Site Footer block's CSS	Every page

The site loads, in order: Bootstrap 4, the platform's own styles, the header and footer blocks' CSS, then Custom Styles and the page's CSS. So the site's own rules come last and win.

Page CSS is wrapped in `#cms-content-style { }` for you, which lets it win over Bootstrap's single-class rules without `!important`. In **Custom Styles**, wrap rules for page content the same way yourself.

Build on the palette

The platform styles its buttons, alerts, forms, menus and cards from a handful of custom properties, and works out their lighter and darker shades itself. Set them in `:root` in Custom Styles:

```
:root {
  --primary: #1f6f9f;          /* links, buttons */
  --highlight: #36b1be;        /* fills and marks */
  --info: #2a7a52;
  --secondary: #5a649d;
  --body: #1e252b;             /* text */
  --surface: #ffffff;          /* cards and panels */
  --on-primary: #ffffff;       /* text on a primary fill */
  --site-background: #f7fbfd;  /* the page */
}
```

Write your own rules with these too (`color: var(--body)`, `background: var(--surface)`) rather than with fixed colours. Then the site's dark version, below, and any later change of brand colour reach your rules without touching them. Keep your own names as aliases if you like: `--cx-accent: var(--primary)`.

Check every pairing of text and background for contrast: body text on the page, links on the page, and text on a primary fill. Aim for WCAG AA at least (4.5 to 1 for body text).

A dark version

A site can have a dark version, shown to visitors whose device is set to dark. Write it as a second palette, under both of these:

```
@media (prefers-color-scheme: dark) {
  :root:has(.site-layout):not([data-theme="light"]) {
    --body: #e8ebf7;
    --surface: #121935;
    --site-background: #0a0f24;
    /* ...and the rest of the palette */
  }
}
:root[data-theme="dark"]:has(.site-layout) {
  /* the same again */
}
```

- `:has(.site-layout)` keeps the dark palette off the tenant app, which shares the stylesheet but has no dark version.
- The `data-theme` forms let the site's people see either version whatever their own device is set to: the designer, the rich text editor and the header and footer previews all have a light and dark switch, and use them.
- Put dark-mode differences into the palette's properties rather than into rules of their own. The designer's canvas only picks up the properties, so a rule that targets dark mode directly shows on the site and in the preview but not on the canvas.

Keep clear of Bootstrap and the platform

The public site also loads Bootstrap 4 and the platform's own styles, and a site's people place your blocks among forms, menus, galleries and search results that use them. So:

- **Prefix your own classes and properties**, for example `cx-`. Don't define `.btn`, `.card`, `.row`, `.col-*`, `.container`, `.lead`, `.badge`, `.table`, `.nav*`, `.active`, or anything starting `cms-`, `site-`, `content-`, `header-` or `footer-`. The one exception is `cms-page-width`, below, which the platform leaves for you to style.
- **Give every block one outer element of your own** (`<section class="cx-band">`), and write element rules (`h2`, `p`, `a`, `ul`) only inside it, so they don't reach the platform's pages.
- **Put plain link colour inside `:where()`**: `.cx-band :where(a) { ... }`. Written as `.cx-band a` it outranks your button class and turns your buttons' text into link colour.
- **Style Bootstrap's own classes only where you must**, and scope them tightly.

How wide a plain page runs

A page made without the designer, such as one imported from Word, has no rows to put a class on, so the site wraps its content in `<div class="cms-page-width">`. The platform gives that class no styles at all: with nothing in your stylesheet, the page runs the full width of the window. Say what it should be in Custom Styles. To match Bootstrap's `container`, for example:

```
#cms-content-style {
  .cms-page-width { width: 100%; padding-inline: 15px; margin-inline: auto; }
  @media (min-width: 576px)  { .cms-page-width { max-width: 540px; } }
  @media (min-width: 768px)  { .cms-page-width { max-width: 720px; } }
  @media (min-width: 992px)  { .cms-page-width { max-width: 960px; } }
  @media (min-width: 1200px) { .cms-page-width { max-width: 1140px; } }
}
```

Or a narrower measure for reading, or whatever suits the site. The site's people can put the same class on a row in the designer (**Row CSS Class**), so designed pages line up with the plain ones. Tell them it's there.

Classes the site's people choose

In the designer, the site's people give a row, a block or a form a **CSS Class** or **Layout Class**, and a block a **Visibility Class** for an animation as it scrolls into view (see *The page designer*). This is how they get a coloured band, a narrow column or a card style without writing CSS, so provide the classes they'll need, and tell them the names: the designer suggests only the classes an installed theme declares, not the ones in Custom Styles.

Writing blocks that survive editing

Blocks are edited in a rich text editor that tidies what it doesn't recognise:

- **An empty element is removed.** Put `<!-- keep -->` inside any element that must stay empty, such as a decorative bar.
- **`<b>` becomes `<strong>` and `<i>` becomes `<em>`.** Write and style those.
- **No scripts.** Build interactivity in CSS.
- **Pictures** come from the site's media library. Galleries, carousels and scrollers have block types of their own, whose HTML is the template for one picture (see *Galleries, carousels and scrollers*); use them rather than hand-written markup, so the site's people can change the pictures.
- **Tokens** such as `{page:title}` fill in details of the page a block is on (see *Blocks*).

The header and footer

The Site Header and Site Footer blocks are the whole header and footer: their HTML and CSS. Place the menus with `{menu:main}` (the navigation bar, with the logo and search) and `{menu:footer}` (the footer's link groups). The links themselves stay in the site's menus, which its people edit.

The phone menu is CSS only, so the header's CSS can restyle it: as a dropdown, a drawer from the side or a full-screen menu. Check it opened on a phone, below 992 pixels wide, where the menu's sections become the slide-out menu.

Before you hand over

- Look at every page at phone, tablet and computer widths, and in light and dark.
- Check the contrast of every text and background pairing.
- Check every picture has a description.
- Give the site's people the names of the classes you made for them, and what each one does.
- Ask the site to remove your login once the work is done.