

# User Manual

**Bizazz Website Management System**

SuttonNet

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# 1 Introduction

## 1.1 Introduction

Bizazz is a website management system owned and developed by Bill Sutton of SuttonNet.

This manual is a user's guide for SuttonNet clients whose websites use the Bizazz system.

This is a cutdown version of the full operating manual. If you can't find what you want here, ask SuttonNet for more instructions.

## 1.2 Technical Matters

1. Bizazz is written in PHP with a mysql database. It incorporates shareware and original software, and is frequently updated and expanded.
2. Bizazz resides on a SuttonNet server. The system is separate from each Bizazz website.
3. The Bizazz webpage editor for a specific website may include responsive design components from either Twitter Bootstrap, Foundation<sup>5</sup> or Foundation<sup>6</sup>. The Bizazz interface itself is not (yet) responsive.
  - *Responsive design* causes a website to re-arrange its layout for different sized screens.
4. The webpage editor is based on a system called Xinha. Xinha offers more facilities than any other web editor we know of. However, due its age:
  - a) some of its editing functions are no longer useful; and
  - b) for responsive styling, we needed to add other tools.
5. Until a better responsive editor becomes available, Bizazz page editing functions are in two sections:
  - Xinha tools (top of webpage editing frame) and
  - responsive styling tools (right side of the editing frame). (Section 4.4)

## 1.3 Using Bizazz

### 1.3.1 What You Can Do

Bizazz page templates are more flexible than templates in some other website software. You can:

- update, add or delete text, products, feature items, links, images, gallery photos and PDF documents
- re-arrange or rename menu items
- re-order content and change layout on webpages
- add new webpages
- delete, hide or activate webpages
- design or edit forms for webpages.

### 1.3.2 What You Can't Do

Contact SuttonNet to:

- change website colour scheme, borders, header, footer, logo;
- change menu styling and position.

### 1.3.3 If Bizazz Won't Do What You Want

1. Don't fudge. Fudges that work on your computer do not work on your customer's.
2. Don't give up.
  - Check the manual, go to the Bizazz Support area of our website <https://suttonnet.com.au> or contact us for help.
  - There are different versions of this manual and different levels of the Bizazz interface. Ask SuttonNet.
  - Bizazz is versatile software.
    - You might need extra functions added for your website.
    - You can ask for new features to be added to Bizazz itself.
    - SuttonNet provides customised web programming for complex or unusual specifications.

## 1.4 Web Browsers & Operating Systems

1. You can update your website using Bizazz on any operating system and on most common web browsers.
  - Due to idiosyncrasies with Internet Explorer/Edge, we recommend that you use another browser when updating your website.
  - If you have customised any settings on your browser/operating system (eg the double click setting in Chrome), it could affect the operation of other software - including the Bizazz webpage editor.
  - Chrome versions in 2020 do not handle some complex Bizazz functions such as columns. Use Firefox instead.
2. The Bizazz photo processor requires Oracle's Java, which can be installed on your computer from <https://java.com> (see Section 7.2). The processor cannot be used on tablets, because they do not usually support Java.
3. Otherwise, Bizazz functions well on PC, Mac or tablet.
4. The Bizazz interface is not designed for use on mobile phones, but it can be done.
5. Microsoft Word uses a non standard character set as default. To paste Word (or other) text into your webpages, walways use the Clean Pasted Text function (Section 4.4.4.4). This changes text to Universal Character Set.
6. Ad blockers prevent some Bizazz functions from working. If Bizazz doesn't display all functions:
  - a) save any draft webpage or other updates
  - b) disable the ad blocker for your website only
  - c) refresh the Bizazz page you are on.
  - d) If you have more than one Bizazz website, disable the ad blocker separately for each website.
7. Web browsers and operating systems are continually changing. Contact us if you have any problems using Bizazz with your system.

## 1.5 Your Responsibilities

### 1.5.1 Some Legal Considerations

1. Website content (images, text, audio & video files...) and often the graphic design are copyright.

2. Website content is usually authored by the website owner, or *for* them by a contractor or employee, so copyright generally belongs to the site owner. If you want to use material from other sources on your website, it is your responsibility to ensure that you have the right to use it for this purpose and to include any attributions or acknowledgements.
3. Graphic designs may have conditions attached to their use, re-use or variation. Check the designer's contract. Be careful when a business or website changes (eg a new business entity created; a new template re-uses or alters a graphic design; a different website domain is used, or a different web developer).
4. It is the website owner's responsibility to ensure that their practices and website meet legal obligations and are ethical. This includes secure handling of private data, such as credit card information.
5. If you provide advice on your site, eg via a blog, you may need to add disclaimers as to the general nature of that advice.
6. SuttonNet does not provide specific legal advice. Consult Department of Fair Trading or similar government websites in your State or Territory and Commonwealth government bodies such as the ATO for up to date and complete information for online trading: eg credit card surcharges, GST, privacy policy, misleading advertising.
7. We will query you about your instructions to us or about your website content if we become aware, in the course of our business, that these may be illegal or lacking integrity. We reserve the right to refuse service if we are not satisfied that any client's website or their request to us is legal or ethical, in our judgment.

### 1.5.2 Software Licence

A client has the right to use Bizazz under licence from SuttonNet:

- only on a specified website; and
- only while SuttonNet hosts that website, and all hosting and annual licence fees and other charges are paid up to date.

Bill Sutton holds copyright to the Bizazz system and to component code developed or revised by him.

### 1.5.3 Security

1. For best, fastest results and greater website security:
  - a) keep your computer and all linked computers free of viruses, spyware and malware. This is critically important if you have an ecommerce credit card decryption key stored on your computer;

- b) ensure that your computers are in a secure environment. No one should have unauthorised access to your Bizazz password, decryption software, or business-in-confidence information: eg ecommerce data, customer database, unpublished webpages;
- c) retain a valid security certificate on your website.
  - i. Ensure your domain name does not expire (this is all that's needed for a Let's Encrypt brand certificate); and
  - ii. Renew any higher level certificate in good time, so that security checks and installation are complete before the old certificate expires.
- 2. Bizazz allows for controlled levels of access by different users: eg some staff may only edit webpages, others may be able to update product prices or process ecommerce orders.
- 3. One or more users have authority to publish draft webpages and to manage users' access privileges in Bizazz.
- 4. See Section 3.2.3, Section 3.2.2.
- 5. SuttonNet has full access to the Bizazz system for every website, for troubleshooting and client support.



# 2 Bizazz Basics

## 2.1 Login

1. Enter the website's name `/bizazz/` into the address bar on your web browser.  
- eg `suttonnet.com.au/bizazz/`
  - Note: no capital letters.
2. Enter your login and password, as supplied by SuttonNet. You can now see the Bizazz Main Menu.
3. To change your password: go to Administration – Users – Edit User (Section 3.2.2).
4. To start up the photo processor for the first time on this computer: see Section 7.2.

## 2.2 Save

### 2.2.1 Save Your Work

Save work before you close a draft webpage or leave Bizazz.

Save your draft webpage too while you are editing it. You can do this either manually or via AutoSave (Section 4.3.2).

Beware: AutoSave cannot work on a new draft webpage until the page title and menu setting are completed.

### 2.2.2 Timing Out & Log Out

1. Your Bizazz session will automatically time out if it has not been used for 24 minutes. Click on the Bizazz logo/name or on 'log in' to start a new session.
2. To log out: either:
  - just close the Bizazz tab on your browser; or
  - if you need to logout on a shared or nonsecured computer, go to the main menu and click on 'Logout'.

### 3. After logout or timing out:

- webpages which are signed out, will remain signed out to the same Bizazz user;
- draft webpages will remain as they were when last saved (manually or by AutoSave);
- a new page under construction *is only saved if it has a page title and menu specifications.*

## 2.3 Getting Around

### 2.3.1 Bizazz Interface

There are 3 Bizazz levels for users: Bizazz Business, Advanced and Developer. Complex tasks don't display on menus and webpage editors in the lower levels.

The interface also has special items for individual websites.

### 2.3.2 Main Menu

Bizazz menu items which you do not need are not displayed.

- *Administration*: update Bizazz user specifications and some advanced settings (Chapter 3)
- *Website*: change most webpages; the core 'content management system' (Chapter 4, Chapter 5)
- *Contacts*: manage a database of customers and other contacts (Chapter 12)
- *Products*: manage ecommerce products and photo galleries (On some websites, it covers other specialised functions too.) (Chapter 11)
- *Commerce*: shipping costs and records of online orders and sales (Chapter 16)
- *Campaigns*: email/SMS campaigns to contacts in the website's database (Chapter 15)
- *Configuration*: create online forms and reports (Chapter 14).

### 2.3.3 Go Up One Level

Most Bizazz pages have an 'Up Level' arrow button at top right, to return you to the next highest menu level.

To return to the main menu from any part of Bizazz:

1. save all changes that you want to retain;
2. click on 'Bizazz' or on the logo at the top of the page.

# 3 Administration

## 3.1 Introduction

The Administration menu is for management of the Bizazz system itself.

Where there are multiple Bizazz users at a client business who work on a single website, usually only one or two of them can access the Administration menu.

## 3.2 Users

### 3.2.1 Select User

#### 3.2.1.1 Overview

Click on 'Administration - Users'. This takes you to the Select User page.

This page lists all users of this website's Bizazz system by last name, first name, login name, email address, phone number. (If your browser fails to display the list of users the first time that you open this page, click on 'List' to trigger it.)

From here, you can:

- add Bizazz users
- remove or suspend a user from access to Bizazz
- set up or alter a user's access to the different functions of Bizazz, and to the website's database
- update user details.

The Select User page is also a contact reference list, eg if your website is edited by people in different locations.

#### 3.2.1.2 Search Users

The Search function is rarely needed. It is useful for the largest websites with many webpage authors.

Search works the same way here as on other pages of Bizazz (eg Contacts, Articles):

1. Enter all or part of a user's first name, last name etc as your search term. Bizazz can search on most of the columns displayed.
2. Then click on 'List' to display the search results.

Note: if you have filtered a search, the filter will still be in place next time you return to this page: ie, not all users will be displayed. Delete the filter specifications and click on 'List', to show all users.

## 3.2.2 Change User Permissions & Other Details

### 3.2.2.1 The Edit User Page

In the list of users on the Select User page, click on the user's last name. The 'Edit User' page will appear.

You can edit any details shown, and/or change the user's password. Bizazz never displays the current password; it only allows you to make a new one.

An idiosyncrasy of some browser versions: if the page tries to offer you the (hidden) password with a blank box to confirm it, backspace through the password to remove the request. Bizazz will not lose the password.

After you have made all your changes, click on 'Update User' at bottom right of the grey area.

### 3.2.2.2 Permitted Functions

The list of 'Permitted Functions' defines what this user can do with Bizazz: edit webpages, approve and publish changes to the website, update a customer's contact details, update product prices, etc.

To change permitted functions, tick or untick the appropriate boxes. If you are not sure what some of these functions mean:

- look at the Edit User page for someone who has similar privileges to those you want, or
- contact SuttonNet.

After you have made all your changes, click on 'Update User' at bottom right of the user details box.

Click on 'Up Level' or the Select User page heading to return to the list of Bizazz users.

### 3.2.2.3 Delete a User

Bizazz will not allow you to completely delete a user record. There might be active links to that user, which you are unaware of.

Untick *all* the ‘permitted function’ boxes, then click on ‘Update User’. This will effectively block the user out.

### 3.2.2.4 Third Party Reassign

To ‘reassign’ means to sign out a draft webpage which someone has been working on, to a different cms user:

- so that the new user can add their own input to the edited webpage before it is published, or
- to obtain their comments on a draft.

Eg: a staff member has a webpage signed out to them, and resigns or goes on a month’s leave. No one can update that webpage until it is reassigned. This can create big problems if product or business contact details are out of date.

Reassigning is only done here *if the webpage draft is signed out to someone who cannot access Bizazz* when the draft is needed.

To use the third party ‘Reassign’ function:

1. At the bottom of the Edit User page, there is a list of all draft webpages signed out to this user, and a dropdown box of cms users’ names.
2. Tick all the pages that you wish to reassign, and select the new user.
3. Click on ‘Update User’.

*A safer option* is to ask the assigned user to reassign the draft themselves, via the editing page. Use this method when you reassign a page which is signed out in your own name.(Section 4.3.7)

Risks with reassigning:

1. The *new* user needs to know you have reassigned a webpage draft to them, or it will be just as inaccessible as before.
2. The *current* user needs to know you are reassigning. Then you won’t reassign a draft while they are working on it, and lose their latest changes.
3. You could lose the entire draft webpage, if the next user does not save the draft after he/she has opened it. Mixups sometimes happen as different versions (published, archived, draft) can share the same page title. *Draft webpages are not archived; they can’t be retrieved if lost.*

- Check whether the draft signed out is the same as a published version of the article: ie if there is an archived copy. Ensure that all versions are saved.
- To protect your draft from accidentally being deleted, let the next contributor know if this article is the only copy. You can use the Notes section of the editing page, if they are familiar with this. (Section 4.5.4.5)
- Also warn the next author to click on ‘Save Article’ or ‘Submit for Publishing’ *whether or not they make changes to the draft*, and to avoid ‘Abandon Draft’, unless you are happy for them to delete your work.

### 3.2.3 Add New Bizazz User

Click on ‘Add User’ on the Administration – Users page. Complete the details (login name and password, first and last name, email address and phone number). Password must be 6 - 16 characters.

Click on ‘Update User’.

On the Select User page, check that the new information is correct. Click on the new user’s last name, to complete setting up the new user details.

Tick all the required boxes on the Permitted Functions list.

An idiosyncrasy of some browsers: If the page tries to offer you the (hidden) password with a blank box to confirm it, just backspace through the password to clear the request. Bizazz will not lose the password setting when you do this.

Click on ‘Update User’.

## 3.3 Classifications

### 3.3.1 Overview

#### 3.3.1.1 Understanding Classifications

Classifications define how the website organises all the data displayed on it, and collected by it. The easiest way to learn how classifications work is from examples (below and on your own website).

You use classifications to add products or gallery photos, and to work with email/SMS campaigns.

Classifications are most commonly used for:

- creating photo galleries (Section 11.3)

- grouping products
- grouping customer/member contacts.

Classifications run a wide range of website functions, which is why they belong in the Administration area and their terminology is quite general.

### 3.3.1.2 Don't Mess Around with Classifications

Website classifications must be structured in a useful, logical way.

They are set up initially by SuttonNet, in consultation with each client. For some websites, classifications require careful planning.

You can add or edit classifications and 'schemes' (see Section 3.3.2) within the existing structure.

*Do not alter the structure itself, without discussing your ideas with SuttonNet first.* Any changes affect the website and database in ways that you might not be aware of.

### 3.3.1.3 Purpose of Classifications

Classifications are used to:

- create product menus and submenus automatically
- define target groups for email campaigns
- group contacts automatically from data in their online forms
- sort, search and/or report (eg report on e-sales for one part of your product range)
- organise information in a consistent structure
- help design forms used on the website.

### 3.3.1.4 Where to Find Classifications

Go to 'Administration – Classifications' to view the classifications already set up for the website. They are displayed in a tree format.

## 3.3.2 Easy Definitions

### 3.3.2.1 Parent & Child

Classifications are like a family tree. Each 'parent' classification can have one or more 'children'. Each 'child' in turn can act as a parent classification to other 'child' classifications.

### 3.3.2.2 Classification Scheme

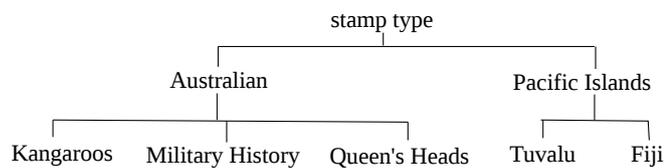
‘Scheme’ is the broadest classification, the top level. All entries within a ‘scheme’ are used for a similar purpose: eg ‘contact’ is a scheme on many websites.

A scheme has no sequence number and no parent classification.

### 3.3.2.3 Classification

Classifications are the groupings, subgroupings etc within a scheme. Eg a stampdealer’s website might have:

- scheme: stamp type
- classifications: Australia, Pacific Islands; with (sub)classifications under each.



This can be used to create instructions to:

- treat all the lowest classifications as a special right hand menu
- mark contacts interested in Australian Military History stamps
- automatically direct emails about a special on Pacific Island stamps only to customers who have stated an interest in them.

### 3.3.3 Cross Classifications

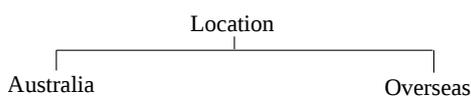
Databases, like hand-drawn tables, are limited to 2 dimensions. Cross-classification across different schemes is not possible.

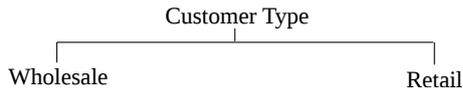
Instead, set up multiple schemes.

Eg: Suppose your business sells to customers overseas and within Australia: both wholesale and retail.

Overseas Wholesale	Overseas Retail
Australia Wholesale	Australia Retail

To cover all the possible combinations when setting up email campaigns (Chapter 13, Chapter 15), : you would need 2 classification schemes:





To trigger an email to ‘overseas wholesale’ customers, Bizazz would use both the ‘location’ scheme and the ‘customer type’ scheme, at the same time. (Section 15.8.4)

## 3.3.4 Edit Schemes & Classifications

### 3.3.4.1 Introduction

Go to Administration – Classifications to see the classifications displayed. Click on +/- to view/hide all subclassifications under a classification name.

You can:

- rename old classifications
- re-order classifications within the same list
- change link names or classification descriptions.

Warning: Do not alter existing classifications without SuttonNet approval. Website forms, product display proformas etc would be affected.

### 3.3.4.2 Edit a Scheme or Classification

1. Click on the scheme/classification name and update its name, link name and/or description. Click on ‘Update Classification’ when you have made all your changes.
2. The *description* helps all Bizazz users to understand what this classification covers.
3. The *link name*:
  - is sometimes used in webpages, within a snippet or form
  - is automatically updated in those locations, if you edit it here;
  - needs to be unique, but doesn’t need to match the classification name. It does help your web developer if it is clear from a link name which classification it belongs to;
  - must be a short name in lower case, separated by hyphens (not underscores or long dashes).
4. *Sequence* sets the order of product pages in a menu, or of multiple photo galleries on a webpage.
  - For a classification to appear earlier or later in the list, specify its position (1, 2, 9 etc) under Sequence. ‘99’ safely sets a classification to last.

- After changing the sequence, you may need to update sequence numbers for all the classifications listed after it. If any classifications have the same sequence number, they will be ordered alphabetically.
  - If Sequence is not used, Bizazz will list the classifications alphabetically.
5. *Active/Inactive* buttons: for SuttonNet use only.
  6. Bizazz also shows:
    - a) the ‘child’ classifications under this classification
    - b) all ‘links’ assigned to this classification: eg every connection between this classification and an actual product/contact/gallery photo.
  7. To return to the main Classifications page, use the ‘Up Level’ button.

### 3.3.4.3 Add Schemes & Classifications

*(i) To set up a new classification scheme:*

1. Go to Classifications and click on ‘Add Scheme’.
2. Type in a simple scheme name.
3. Tab to Description; complete a brief description of this scheme.
4. The link name is automatically generated from the scheme name. You can alter this, but it is rarely necessary. See Section 3.3.4.2.
5. Select ‘Active’.
6. Click on ‘Update Scheme’ at lower right corner.

*(ii) To add a classification to an existing scheme:*

1. Go to Classifications and click on ‘Add Classification’.
2. The process is the same as for adding a scheme, except that:
  - a) You need to click on a radio button to show where this new classification fits into the tree. Bizazz will only allow you to select one.
  - b) You can give a Sequence number to your classification, to identify its position among ‘brother/sister’ classifications:
    - See Section 3.3.4.2.
    - You may need to edit some other classifications’ sequence numbers, to fit the new one in.

*(iii) To add a subclassification to a classification:*

Follow a similar process to (ii), fitting the subclassification under your chosen classification.

## **3.4 Values**

for SuttonNet use only



# 4 Webpage Content Management System (CMS) I

## 4.1 Introduction

This chapter covers webpage publishing and most editing functions that use Xinha icons.

- For styles, snippets and tables, see Chapter 5.

In the Bizazz main menu, click on 'Website – Pages' in the dropdown menu.

This takes you to a page called 'Pages – Select Website Articles'.

You will see a list of webpages from your site, including drafts and some pages that do not appear in your website's menu, eg (for ecommerce sites) an invoice page.

Bizazz has powerful tools for webpage layout. There is plenty that you *can* do.

- Keep the website's goals and its readability for site visitors foremost.
- As with other design projects, a unified look and structure works best.
- A dummy 'test' webpage on your Bizazz system is useful for trying things out.

## 4.2 Pages - Select Website Articles

### 4.2.1 Understand Articles

A webpage can have several versions:

- the current published version;
- a draft which is being worked on;
- archived versions, which were once on the website but the page has been updated since.

Each of these is technically a webpage 'article' and you will see that term in Bizazz. For simplicity's sake, this manual will often refer to the 'webpage' or 'draft' that you are working on.

Articles are listed in Pages - Select Website Articles by page title, category and menu location on the website.

## **4.2.2 Archived Webpages**

1. Whenever a page is republished, its previous version is stored in Archives. All older published/saved versions of the webpage are retained there, back to when the website was first created.
2. Use Archives:
  - to copy and re-insert text, photos or layouts that you want to use again, or
  - to restore a webpage that you have mangled.
3. Archived articles are filed under page title and date archived.
4. Use the Status filter + search button to access archived pages.
  - a) Go to Website – Select Articles.
  - b) Set the Status filter to ‘Archived’.
  - c) Click on ‘List’ at the end of that row.

Refine the search further if you need to. (Section 4.2.4)

5. Draft webpages are not archived. The archives only contain pages which were once published.

## **4.2.3 Select Article Functions**

### **4.2.3.1 View Article**

To view, but not edit, an article: click on its page title in the list. This works even if it is archived, suspended or usually accessed only via a member’s login.

Some complex content such as forms will not be displayed in this test view.

### **4.2.3.2 Add New Webpage**

Click on this button (top left of grey area) to create a new webpage and add content to it. (Section 4.6)

### **4.2.3.3 Filters**

1. *Filters* are boxes within the grey area, that restrict which items are currently displayed in the list beneath it. Filters are used throughout Bizazz.
2. On a small website, you might never use filters. On a large website, you might use filters constantly.

3. To change the listing: set up all the filter parameters you want and then click on 'Search'.
4. *Name Term* or *Filter Term* is text which forms part or all of the page titles, contacts etc that you want to search for.

Eg:

- 'Welsh' will locate the webpages 'Neshama Welsh Ponies, Snowy Mountains NSW' and 'Welsh Section C Ponies for Sale'
  - 'sm' will find all contact names with that combination of characters, eg Smith, Wellsmore
5. As well as names, you can filter by menu location/classification or by *Status*. *Status* refers to whether an item is currently published on the website. For webpages, it covers other possibilities too: see Section 4.2.3.4 and Section 4.2.4.
  6. Changing filters affects what you see displayed the next time you log into Bizazz.

#### **4.2.3.4 Webpage Status**

1. For webpage articles, status options in a filter (Section 4.2.3.3) are:
  - currently published on the website;
  - in draft; or
  - archived (Section 4.2.2).
2. Status filter's default setting is 'all'.
3. 'Article status' within the cms page editor also relates to publishing, but it shows more options. (Section 4.3.6)

#### **4.2.3.5 Updated**

The 'Updated' column shows the latest date and time at which changes were made to each article. It updates automatically.

Listing by date last updated can help you locate an article; see Section 4.2.4.

### **4.2.4 Find Webpage in the List**

(i) To find a specific webpage to edit it, browse the list under 'Select Website Articles'.

1. Default list order is by menu location:

- alphabetical listing of menu name, then submenu, subsubmenu;
  - nonmenu pages listed below menu pages.
2. Usually it is easier to identify a page by menu location (columns 3,4,5) than by its page title. Note: page titles are not the same as webpage headings. (Section 4.6.3)
- (ii) If you can't find it:
1. is a filter (Section 4.2.3.3) switched on? Check all the filter boxes, adjust them to be blank/on their default settings and click on 'Search' to list all webpage titles; or
  2. click on a column heading, to sort the list differently (eg by date last updated). Click on it again to reverse the order; or
  3. use the search by filters function in the grey area. Bizazz can filter by page title, category, menu location, status, and/or name of user the article is signed out to.

### **4.2.5 Sign Out Webpage**

1. Find the article you want (Section 4.2.4).
2. Click on 'Sign out article' next to the page title.
  - Your name is now highlighted, with a pencil icon against it.
  - A copy of the real article (as a draft) is created for you to work on.
3. Don't be confused if you can see 2 draft articles in the list, with the same page title. Some websites have the same page located twice, under different menu names. They are listed in Bizazz separately. When you work on one draft and save it, the other draft page is automatically edited and saved too. (Section 4.3.5.2)
4. No one else can change this webpage while the draft is signed out to you.
5. You can re-assign the draft to another cms user. (Section 4.3.7)
6. If you need an article that is already signed out to someone else:
  - contact them to re-assign it to you; or
  - someone with access to the Administration page can reassign it to you. (Section 3.2.2.4)
7. You don't have to work on your draft straight away, or complete all your changes at one sitting. Bizazz will retain the 'signed out' marking on an article until the draft is abandoned or published.
  - Always save the draft before closing it.
8. To start editing: go to second point in Section 4.3.1.1.

## 4.3 Edit a Webpage/Article: the CMS Editor

### 4.3.1 Overview

#### 4.3.1.1 Open CMS Editor

1. If the article is not already signed out to you: in the first column of Website - Pages, click on your name.
2. Click on your highlighted name + pencil icon.
3. Bizazz takes you to the webpage editor. This is a complex application; it takes some seconds to open.

#### 4.3.1.2 Experiment

A draft is only a copy of the real webpage. You can try any changes out on it and never affect your website, as long as you don't publish the draft.

You can also set up a dummy webpage on your Bizazz system (category 'Future Use' or 'Non Menu'; page title 'Test' or similar) for experimenting.

#### 4.3.1.3 Keep Searches in Mind

After any substantial editing, check the metadescription and keywords; they might need revision.

Rarely, you might need to change page title (Section 4.6.3). Don't change page title and href (Section 4.5.3.5) often, as it affects search engines' indexing of the webpage. See Section 4.5.3.

#### 4.3.1.4 CMS Editor Page in the Manual

Functions that your site doesn't use may be deleted from your version of the manual. Fields at the *very top* of the editor screen: see Section 4.3 &/or Section 4.6.

The *webpage editor frame* (where you type in the webpage text) and its icons are explained in:

- Section 4.4 (the simpler WYSIWYG editing tools)
- Section 4.4 (creating columns or panels, inserting complex code such as videos, maps, Facebook or Twitter icons and contact forms, rotating photo gallery)
- Section 5.2 (right hand column of cms editor – styling tools)
- ?? (tables)

- Chapter 6 (photos and other images)
- Section 15.6.7 (variables: used in email/SMS campaigns).

For fields *below* the editor frame, see Section 4.5.

To *create a new webpage*, see Section 4.6.

### 4.3.2 AutoSave

1. AutoSave is switched on by default. Default setting is ‘Automatically save every 10 minutes’.
2. You can alter the number of minutes, or turn AutoSave off. This will apply to all your webpage editing, not just to the article you are currently working on.
3. Danger: AutoSave cannot work on a new draft until the page title and menu setting are completed. (This is like needing a filename and filetype before you can save a wordprocessing document.)
4. Save manually via the Save button:
  - if you have switched AutoSave off,
  - before you close the page, or
  - if you won’t be using Bizazz for a while. You don’t want to lose your work if the session times out.

### 4.3.3 Page Title

Page title is *not* the prominent heading (Section 4.4.4.5) displayed on a webpage. Page title is:

- the wording visible in the browser tab when this webpage is open; and
- the wording of the clickable heading in online search results.

Insert, check or, if absolutely necessary, change the page title here (maximum 69 characters including spaces).

See Section 4.6.3 (important information for good search rankings and webpage file-name (href) management).

### 4.3.4 Category

*Category* indicates how this webpage fits into the website structure:

- *Menu* is for pages which have a defined location in the website menu system. Most articles are in this category;

- *Non Menu* is for pages which do not appear on the actual website menu (eg 'Thank you for contacting us')
- *Future Use* is for articles which will not be published to the website until later.

Default webpage category is Menu.

## 4.3.5 Menu Levels, Extra Menu

### 4.3.5.1 Menu Levels

These boxes show the webpage's location in the website menu. Menu levels work down, from left to right (topmenu, submenu, subsubmenu...).

To *change the menu name* for this page: edit the text in the completed menu box furthest to the right.

To *change the webpage's menu location*:

1. If applicable, select topmenu and/or submenu locations from the dropdown boxes;
2. At the next lower menu level: select the former menu name or type in a new menu name for this webpage.

See also Section 4.6.6 (more on menus, including search engine optimisation) and Section 4.9 (Website Menus Management).

Publish your change.

### 4.3.5.2 Extra Menu

It can be useful to have some webpages listed as menu items in two or more locations. Click on 'Extra Menu' and enter the second, etc menu details.

To remove a menu name, and display the webpage at only one location on the site: simply delete one line of menu specifications.

Publish your change.

## 4.3.6 Publish Status

1. This dropdown box shows *Draft* while you are editing an article or creating a new webpage. To retain a draft, you must save it via AutoSave or manually. *Draft articles are never archived.*
2. If you are editing/checking a draft article that has been submitted for publishing, you will see *Submitted for Publishing* displayed here.

3. Use the Status box when you want a webpage to be (permanently) *Deleted* or (temporarily) *Suspended* from the website:
  - a) Select your option, then click on ‘Save’.
  - b) After the green confirmation message appears near the top of the page, click on the ‘Publish’ tab (above the grey area).
  - c) Follow the instructions for publishing, to complete the deletion/suspension.
4. Status is also used to retain an article as a draft, but not signed out. Select *Deferred* and click on ‘Save’.

### 4.3.7 Assigned

The ‘Assigned’ dropdown box allows multiple authors to check or contribute to the same draft article. It currently shows your name.

- (i) To forward your draft article to another cms user:
  1. click on their name in the ‘Assigned’ dropdown list;
  2. if you want to include a note to the next user, eg to tell them what changes you have made, click on the ‘Notes’ section at the bottom left of the screen (see (Section 4.5.4.5)) and type your message;
  3. save the article;
  4. return the Bizazz main menu.

Beware of losing your draft:

1. The new user needs to know you have re-assigned a webpage draft to them.
  2. If the next user looks at the draft, they must re-save it, whether or not they make any changes. Otherwise, your whole draft page will be lost. *Draft (unpublished) webpages are not archived.*
  3. If the draft is the same as a published version of the article, then there is an archived copy.
  4. To protect your draft from accidentally being deleted: warn the next author to either ‘Save Article’ or ‘Submit for Publishing’. You can use the Notes section of the editing page if they are familiar with this. (Section 4.5.4.5)
- (ii) To re-assign a webpage which is not signed out to you but to another user, see Section 3.2.2.4.

## 4.4 Webpage Editor

### 4.4.1 Overview

#### 4.4.1.1 Template vs Content

1. *Page content* covers all the text, images, icons, links &c that appear on a webpage between the header and footer.
2. *Page template* includes graphic design elements like:
  - page header
  - footer
  - menu styling & position
  - heading/subheading styles (colour, size, any bolding, etc)
  - font
  - styling tools, eg colour options for text & background. (Section 5.2)
3. In Bizazz, your website's page template is like a solid outer casing with a blank central core. Most things in that core can be edited, added to or re-arranged by you, using the webpage editor.
4. Thus content is edited using the cms editor aka webpage editor; template is only edited by SuttonNet.
5. The webpage editor interface is designed for use by non programmers. If you have a standard (business level) Bizazz licence, you have no actual access to the html code behind the webpages.
6. Even in higher level Bizazz versions, in default mode the webpage editor displays each page as text and images, not as computer code. For that reason, it's called a WYSIWYG editor (an acronym for 'what you see is what you get').
7. No WYSIWYG webpage editor can fully display every part of a webpage as it will look in the published version. Eg some snippets (eg webpage forms) are marked with a 'placeholder'. But the text and photos will appear in Bizazz just as they will on the actual website.

#### 4.4.1.2 What You Can Do

Web editors are similar to wordprocessors. They have more power in some ways; but fewer options for text appearance, to keep a consistent look. If you need different options (Section 5.2), contact SuttonNet.

You can:

- type or paste in text;
- add photos or other images and create borders for them;
- arrange text or photos in columns of various widths;
- move blocks of text or photos;
- add maps, audio files and videos;
- create panels, lines, links and more.

## 4.4.2 Important Tips

When dealing with website layout and styling, it's inevitable you will encounter some peculiarities of website code compared to wordprocessing.

### 4.4.2.1 To Move Content

To move content on a draft webpage: highlight and copy, then paste:

1. use Ctrl+v for pasting; or
2. use right mouse click, then 'paste'; or
3. use html code view if you have access to it. This is a good method for moving complex code sections such as panels and boxes. You can ensure that no code gets left behind through not highlighting accurately; or
4. copy to a clipboard and use the 'clean before pasting text' icon (Section 4.4.4.4). This will remove all formatting from the copied text.

### 4.4.2.2 Paragraphs

When typing in text:

- *'Enter' starts a new paragraph, with appropriate spacing from the paragraph above, but*
- *'Shift+Enter' starts a new line in the same paragraph.*

This distinction matters:

1. heading styles affect a whole paragraph, not a highlighted portion. Other styling often applies to a paragraph too, with a few exceptions (Section 5.2);
2. it helps avoid annoying problems like inconsistent spacing.

### 4.4.2.3 Block vs Inline

A *block* is a section of the content which is related structurally in a special way. Eg a column & its contents, a heading, a paragraph, a set of dot points, a panel & its contents.

- A block-level element always starts on a new line and takes up the full width available (stretches out to the left and right as far as it can). [<https://www.w3schools.com/html/h> accessed 3 May 2020]
- If you click anywhere inside a block, then apply a style (Section 5.2) from the right hand list, the whole block receives the styling.
- This also applies to some web editor icons (eg h1-h6) from the top line of the editing window. Just click on the line and select the heading style; the whole heading adjusts.

Then there is *inline* content:

- An inline element does not start on a new line and only takes up as much width as necessary. [[https://www.w3schools.com/html/html\\_blocks.asp](https://www.w3schools.com/html/html_blocks.asp) accessed 3 May 2020]
- Inline text formatting allows you to style a part of the text differently from the surrounding text. Eg 2 out of 3 dot points, several paragraphs, part of a sentence, 2 sentences within a longer paragraph.
- To apply a style to inline text or edit it using the web editor, eg italics, highlight the whole section of text & then apply the style/click on the editing icon.

## 4.4.3 Fully Open the CMS Editor

To get started, click in the large frame area where your webpage content will go. This opens the cms editor fully.

Your draft article is now displayed in the editor frame, and you can access all the icons for editing it.

### 4.4.3.1 Maximise/Minimise Editor

1. *To show the content editor frame in full screen view:*

- Click on the blue & white icon first from the left, immediately above the editing area.

For all but the most trivial changes, it is easier to work in full screen view.

2. *To reduce the editor frame:*

- Click on the blue & white icon again.

This allows you to change specifications like the menu name, and save the draft /submit it for publishing.

## 4.4.4 CMS Editing Icons

### 4.4.4.1 Overview

1. Editing icons run across the top of the editor frame. They are described here in the order they appear, from left to right. On a smaller screen, rightmost icons go in a second row.
2. Many look and behave as in wordprocessing, eg:
  - Bold, Italics
  - Underline
  - Subscript and Superscript
  - Left/Right/Centre/Full Justify (Section 4.4.4.6)
  - Undo and Redo.

We have skipped these in this manual, apart from a few comments here and in Section 4.4.2.

3. To find out what a particular icon is: hover over it with the mouse. The icon's name will appear.
4. Don't combine heading styles with bold/italics/underline. Search engine robots will respond better to the standard heading style specifications of the website. If you think that a standard heading isn't prominent enough, contact Sutton-Net. We can adjust the heading style for the whole website.
5. If you find that your cms editor doesn't have some of the icons listed below, it is because you have a restricted version of Bizazz (either Business or Advanced). This manual covers all the functions available in the Developer version.
6. Icons for tables are covered in ??.

### 4.4.4.2 Maximise/Minimise Icon

See Section 4.4.3.1.

### 4.4.4.3 Find & Replace

Do not use the search & replace function either in the web editor icons or on your own computer. They insert unwanted code along with the replacement text.

You can safely use ctrl+F to *find* instances of the text you want to replace; then manually type in the new text.

The Find & Replace icon is part of the base web editor that Bizazz was built on. It will be replaced in the new version of Bizazz.

#### 4.4.4.4 Clean Before Pasting Text

It's essential to use this icon *whenever you paste content from a source outside Bizazz*: eg an email, wordprocessing document.

This icon removes any (hidden) code which doesn't match webpage or web browser standards. The code can cause layout problems and gobbledygook on websites.

1. Click in the editor frame where you want the text to go.
2. Click on the 3rd icon from left.
3. Paste text from the outside file into the frame which pops up.
4. Make sure there are 2 x Enters wherever you want a new paragraph to start within the text passage.
5. Click 'OK' below the Clean Text frame.
6. Set any headings to one of the heading styles (h1 to h6). (Section 4.4.4.5)

Note: Microsoft Word uses a non standard character set as default. To paste text successfully into your webpages, even using 'Clean Pasted Text', you might need to change the MS Word setting to Universal Character Set.

#### 4.4.4.5 Headings & Subheadings

1. Your webpage's template has pre-set colours, font sizes and bolding specifications for up to 6 styles of heading. Fixed heading styles create a consistent look across webpages.
2. Heading styles can also include layout specifications, such as a set gap + horizontal line under a main page heading.
3. h1 is used for the main heading at the top of the page.
4. Text in a cms *heading style* holds greater value for search engine robots than does text in the *normal text style*, even if that has bold/italics/underline added. Higher level headings rate more highly for search rankings. And headings are intended to help site visitors find the information they need. So make use of heading styles for keywords.
5. Don't add 'bold', 'italic', underlining etc to pre-styled headings. It confuses search engines, as well as screen readers for visually impaired people. If you want a different look for your headings, ask SuttonNet to change heading settings for the whole website.
6. To apply or change a heading style:
  - click anywhere on a line of text (no need to highlight).
  - select the heading styling you want. It will be applied to the whole 'paragraph' (see Section 4.4.2); but of course, a heading 'paragraph' is usually no more than 1 line on wide screen view.

#### 4.4.4.6 Text Alignment

Text content is left justified by default.

The centring icon works for most blocks of content. There are a few, very complex code units that confound it:

- inline box (you'll be told if your website uses these): use html code to add `<div>` to start of the content to be centred, `</div>` to the end of it, then use the centre icon (or use `<div align="center">` in the html code);
- see Section 5.2.2 for other instances.

#### 4.4.4.7 Ordered List, List Numbering, Dot Points (Unordered List)

These layouts were designed for paper-based text. Don't use dot points or numbered points much on webpages.

- They reduce the amount of visible text on a small screen;
- They waste the little space available;
- They can render text lines oddly short & jerky to read, making comprehension difficult;
- Site visitors get annoyed by constantly scrolling, especially when they see wasted space to left of the text.

Instructions:

1. Highlight the text.
2. The icon showing numbers '1,2,3' turns this text into a numbered list (called an *ordered list*).
3. If you want dot points without numbering: click on the *unordered list* (dot points) icon instead.
4. To alter the style of 'dots' in an unordered list, see Section 5.2.8.
5. To reset the numbering style from the *numbers dropdown box*: highlight an ordered list, then select a numbering style (Roman upper or lower case, Greek etc).
6. For both ordered and unordered lists, generally use:
  - Shift+Enter to continue content on a new line, within the same point; and
  - Enter to add a new point to the list.

#### 4.4.4.8 SubPoints Within an Ordered/Unordered List

Eg:

1. aaa bbb cccccc dd eeeee
2. fff gg hhhh ii jjjj
3. kkkkk ll mmmm nn
  - rrr ssssss tt
  - uuu vvvv www x
4. oo pppppp q

Follow these instructions carefully, to get the right results without frustration or fudging.

1. Enter your text and:
  - a) Press Enter where each numbered point will end.
  - b) Press Shift+Enter at the end of 'kkkkk ll mmmm nn' and at the end of all the subpoints to be indented under that line (except the last one).
  - c) Press Enter at the end of 'uuu vvvv www x'.
2. Highlight the whole section of text and click on the ordered list icon.
3. Highlight the lines to be indented under point 3, and click on the dot points icon.
4. To add more double-indented points to the list: use Shift+Enter.
5. To add more single-indented points to the list: use Enter.
6. To alter the number styling: see Section 4.4.4.7.
7. To alter the 'dot' styling: see Section 5.2.8.

#### 4.4.4.9 Decrease/Increase Indent (Block Quote)

To the right of the numbers dropdown box are icons for decreasing or increasing indent on a highlighted portion. Indented text is grey, in contrast with the default text colour.

Don't overuse indentation. It makes text harder to read on small screens.

*Block quote:* Indent is also used for quotations. Add quote styling for prominent quotation marks (Section 5.2.6).

#### 4.4.4.10 Horizontal Rule (Line)

1. Position the cursor where you want a horizontal line (across the whole text area or within a column/panel).
2. Click on the horizontal line icon.

The line's specifications (width, thickness, colour, any decorative graphics) are preset for your website.

#### 4.4.4.11 Insert Snippet

*Snippets* are blocks of code which you can add - without any knowledge of website coding - to create special graphics or functions.

Snippets are tailored for each website. They insert features like a video, ecommerce products or an online form into a webpage.

You will probably use one or two regularly but can safely ignore most of the options.

See Section 5.1.

#### 4.4.4.12 Insert Image

This icon is used to:

1. upload a single, already-processed photo, sketch map, drawing, cartoon or other image (alternative method to the photo processor); or
2. insert an image that has been loaded to Bizazz, into a specific webpage.

See Chapter 6 and Chapter 9.

To add photos to a rotating photo gallery, see ??.

#### 4.4.4.13 HTML Source Code Icons

1. The *Toggle HTML source* icon  $\leftrightarrow$  shows all the html code behind your webpage.
2. The *Edit HTML for Selected Text* icon T also shows html code, but it hones in on a section of the page which you have highlighted.
3. Check html code to:
  - reveal inconsistencies in your formatting, that could show up on other browsers;
  - clean up unnecessary code, often caused by importing text without cleaning it first; ((Section 4.4.4.4)

- make your webpage more efficient;
  - fix annoyances such as uneven spacing;
  - locate major errors in your editing, when complex functions won't work in the way you want;
  - help you understand and use the cms editor better.
4. The  $\leftrightarrow$  icon is replaced by a page icon when the editor is in html mode. Click on it again, to go back to WYSIWYG format.
  5. To view html code for just a portion of your page: highlight the relevant section and click on 'Clean up HTML'.

#### 4.4.4.14 Insert Web Link

Use this icon for a link to:

- another page on this website;
- a webpage or file on another website;
- an email address;
- a tooltip (a short explanatory note that pops up next to a portion of text);
- a reveal panel (Section 5.2.12); or
- a file which has been loaded to the website backend, eg a PDF (Chapter 10) or a video.

Alternative methods for these files:

1. embed a video using a snippet (Section 5.1);
2. load and link to a PDF using the file link icon (Section 4.4.4.15).

If you want the link to connect to a point partway down a webpage (an *anchor link*) go to Section 4.4.4.16.

You can later *style the link*: make it a button, change its colour etc. (Section 5.2.3)

To *create a link*:

1. Highlight the text which will become a link.
2. Click on the link icon. The *Insert Link* frame appears.
3. Follow instructions below.
  - (i) For a *file or webpage on this website*:
    - a) Click on the correct name from the lefthand list. The link's web address copies automatically to the top Destination box of the right column.

- If you can't see the file/page you want, click on '+' to show webpages in submenus, or the files under 'Documents'.
- b) Under 'Target', select 'Ordinary link'. When a site visitor clicks on the link, the destination page will replace the current page, in the same tab.
    - Special case if the link is positioned inside a frame: (frames are not commonly used these days, apart from iframes):
      - Under 'Target', select 'Same window (jump out of frames)'. The destination page will replace the entire current webpage (frame-set), not just the framed portion.
      - If you select 'Ordinary link', the new page will only appear inside the frame.
  - c) Go to \* below.
- (ii) For a *page or file on another website*:
- a) In the top right hand box, paste or type in the full URL (the web address starting with http://). You do not need to 'clean before pasting text'.  
Eg  
`https://suttonnet.com.au/SuttonNet-Website-Development.php`
  - b) Under 'Target', select 'New window'. When a site visitor clicks on the link, the destination page will open in a new tab in the browser. Your webpage remains open in another tab; they don't lose track of your website.
  - c) Go to \* below.
- (iii) For an *email link*:
- a) Select 'Email Link'.
  - b) Enter the email address and subject. Setting the subject line provides some protection from spam.
  - c) You can set up a template for the message; this is rarely needed.
  - d) Click on 'OK'.
- (iv) For a *tooltip*:
- a) Select 'URL link'.
  - b) Select this page from the menu at left.
  - c) Under Title, type the text required for the tooltip. Do not use '&' in the text.
  - d) In the Rel dropdown box, select 'tooltip'.
  - e) Click on 'OK'.

(v) For a reveal panel (Section 5.2.12):

- a) Select ‘Anchor Link’.
- b) Select the correct reveal panel from the dropdown box.
- c) Click on ‘OK’.

\* For *all links except email or reveal* widget, there is more to do:

- *Link Title* shows when a site visitor hovers their mouse over the link. You can give more information about the destination page, to guide the visitor to linked pages that will be useful to them. Fill in a relevant title that is a drawcard, or leave the box blank.
- *Rel* is a tool used by some search engines. It can help your webpage gain search engine rankings, through associating your business &/or your own name with authorship of information or opinion pieces that you’ve published online. Select:
  - *author* when creating a link to information about the author of the webpage containing the link: eg their Facebook page, an About personal page;
  - *publisher* when creating a link to information about the publisher of the webpage containing the link (eg to the About page for your company);
  - *me* to link to your personal Google Plus page. You need to set up a link from it back to this webpage too;
  - *nofollow* if you do not want search engines to index the file/webpage you are linking to (eg a blank enquiry form);
  - Otherwise, leave ‘Rel’ blank.
- Click on ‘OK’.

Note 1: Google no longer uses Rel. Instead, if you have a google account you can ask SuttonNet for help setting up Structured Data Markup to webpages. You can also set up a Google Business page that links to your website.

Note 2: The Target option ‘Popup window’ is an old feature which opens the destination page in a new window of pre-defined size, set up for your website. Reveal is usually better for modern websites. (Section 5.2.12)

#### 4.4.4.15 File Link

This icon, like a yellow box with a chain link, is used to:

1. *load PDFs or similar documents* from the files on your computer to the documents folder of your website;
2. *create a link* to a PDF from the webpage;

### 3. *edit a PDF link:*

- to go to a different PDF, or
- to change the link's title.

Links to PDFs already stored in the documents folder can also be edited/created via the general Link function. (Section 4.4.4.14)

Note:

1. Generally use PDF format for documents on websites, not Word or similar. This is for security. A PDF document cannot be altered; the information remains intact, as you published it.
2. A few websites need downloadable documents, that are intended to be edited. The 'Insert PDF Link' function works for these nonPDF documents too.
3. PDFs etc are not easy to read on most phones or on small tablets. Print is tiny. Only a small section of the document shows at one time. (Some phones do have a PDF reader installed).
4. For pro's and con's of formats like PDF vs webpages, see Chapter 10.
5. Keep all website documents well organised within the documents folder:
  - a) Subfolders help everyone working on the website (including SuttonNet) to identify the right document;
  - b) Check name of each file before uploading; edit if needed.
    - Filenames are best with \_ or - between words, no spaces;
    - No special characters including '&';
    - By using the same filename on your computer and in Bizazz, it's easy to identify files and update website PDFs to newer versions.

### *Load File*

1. Highlight the text which will become a link.
2. Or to simply upload a PDF, not create a link to it yet: on a test webpage, highlight any text.
3. Click on the 'Insert PDF Link' icon.
4. Select the (sub)folder from the dropdown box in which to file the document.
  - Use the yellow icon with green arrow to go up one level.
  - Click on a folder icon to see subfolders inside it.
  - Create a new subfolder if needed, using the yellow icon with red star. Make sure you select the right top folder; check what is displayed in the dropdown box at the top of the Insert PDF dialog box.

5. Click on 'Browse'. Select the file(s) you want, from your own computer files. All files in this batch will be copied into the same subfolder of Bizazz.
  - Select one file, then hold down Shift key and select any others to be loaded.
  - To load files to another folder: after you finish loading this batch of files, start again with a different target folder.
6. Double click, or click on 'Open' (depends on your software).
7. Back in the Insert PDF dialog: click on 'Upload' next to the Browse button.

#### *Create Link*

To create a link from highlighted text:

1. Select the file you want from the list in the 'Insert PDF' dialog box.
2. Click 'OK'.

#### *Update a PDF*

To update a PDF easily, that is used in a link (eg update a newsletter): see Section 10.2.2.4.

#### **4.4.4.16 Insert Anchor**

1. *Anchors* make it easy to find information on a long webpage or on a phone.
2. An anchor sets the destination of a link partway down a webpage, rather than at the page top.
3. You can create anchor links between 2 different websites that you manage, or within the same website.

To create an anchor:

1. Sign out and open a draft of the *destination page*.
2. Scroll down to where you want the link to go to.
3. Highlight a heading, or some text at the *start* of the paragraph. It's confusing for a reader to come in partway through a block of text.
4. Click on the anchor icon.
5. Give the anchor a meaningful name:
  - a) start the name with an alphabetical character;
  - b) any number of characters is acceptable; no spaces. Dashes and under-scores are OK: eg: Neshama\_Jack\_Flash;
  - c) copy the name to clipboard.

6. Click 'OK', then re-publish the webpage.
7. Sign out and open a draft of the *webpage which will contain the link*.
8. Highlight the link text.
9. Click on the link icon.
10. Either:
  - a) *if the anchor is on this website*: Either (depending on your version of Bizazz) select anchor link, then select the correct anchor from the drop-down box. OR Select the correct webpage from the lefthand list, then add '#the anchor name' to its URL in the top right hand box:  
Eg /SuttonNet-Web-Services-Diane-s-Page.php#Neshama\_Jack\_Flash;
  - b) *if the anchor is on another website*: type in the full destination page URL and add '#the anchor name'.
11. Continue as for creating a link. (Section 4.4.4.14)

## 4.5 Below the Editor Frame

### 4.5.1 Introduction

Minimise the editing frame. (Section 4.4.3.1)

Here are more specifications for your webpage, and the save/publish functions.

Some of these fields are automatically generated. Some fields are essential, some are optional. Most need occasional updating manually. Keep the Google Description relevant to current webpage content.

### 4.5.2 Show Feature Section

#### 4.5.2.1 Overview

Click on 'Show the Feature Section', at the left immediately under the editing frame. Click on 'Hide the Feature Section'

to close it.

Some webpage templates in Bizazz allow *feature boxes* at the right side of a large screen (lower down the page, for phone view).

A feature box:

- appears only on the webpages that you designate;
- links to a webpage;
- is created on the page that it links to.

#### 4.5.2.2 Feature Title

Type in the feature box heading here. The heading style is pre-formatted.

#### 4.5.2.3 Feature Description

Insert the content of the feature box here, using the editing icons: text, links, photos etc.

#### 4.5.2.4 Feature Status

Choose where you want this feature displayed:

- on the home page only;
- on every webpage (except on the one which it points to);
- on all top level menu pages;
- on all second level (submenu) pages;
- on all pages under the same topmenu item as this page;
- on all pages under the same submenu item as this page; or
- do not display it for now.

#### 4.5.2.5 Feature Icon

Select an icon to go in the feature box, from a set of feature images prepared for your website.

#### 4.5.2.6 Feature Position

If you have more than one feature, specify their display order here (top to bottom on a webpage).

### 4.5.3 For Browsers & Search Engines

#### 4.5.3.1 Overview

These fields ensure:

- that your webpage is displayed correctly by browsers;
- that it is indexed by search engines, so that customers can find it.

As for other fields below the editor frame: minimise the editor frame to access them.

### 4.5.3.2 Google Description, Search Keywords

Keep the Google Description and Search Keywords up to date; they must reflect current content of the webpage.

Page Title plus Google Description work together, to draw people to look at *your* website rather than any of the others listed in search results.

See Section 4.6.3, Section 4.6.7, Section 4.6.8.

### 4.5.3.3 Page Template Box

Page template dropdown box:

- shows the webpage templates for your website;
- displays the template used for this page;
- rarely needs to change;
- is mostly used for new webpages (Section 4.6.4).

### 4.5.3.4 Folder

*Folder* is used by websites with a members' area. It classifies the webpage as Members-Only or open access.

A page that is restricted to members will only show in the menu when a member logs in.

'Members' could be:

- some or all staff;
- return customers;
- executive committee or board;
- organisation members, etc.

### 4.5.3.5 Href

The href is the filename of the webpage. It is automatically generated when the page title is first created.

(i) If you change page title of a *published webpage*, *do not change the href*. Otherwise:

- you lose search engine indexing for this webpage
- you break any links from other websites.

(ii) On an *unpublished website* or a *webpage that has never been published*, change href if you change the page title:

1. Delete contents of the href box.
2. Save the draft webpage.
3. A new href matching your new page title will be automatically generated.

#### 4.5.3.6 SSL

No longer used

### 4.5.4 To ‘Save’ Draft Webpages

#### 4.5.4.1 Introduction

When you have finished editing a draft for this session, minimise the editing frame. You will either:

1. delete the draft (this may delete the webpage altogether) (Section 4.5.4.2); or
2. check that Google metadescription and search engine keywords are correct. Then publish the draft (Section 4.7); or
3. add notes (Section 4.5.4.5) and re-assign the draft to someone else to edit/publish (Section 4.3.7); or
4. save the draft to work on again (Section 4.5.4.4).

#### 4.5.4.2 Abandon Draft

1. If no draft of this webpage has ever been published: do not ‘Abandon Draft’ unless you don’t want to keep any versions of this webpage at all.
2. This draft is the only version in Bizazz. It is not archived.
3. If there is already a published version of this page in Bizazz: abandon a draft only if you don’t want to keep any of the changes in it. That includes edits done in previous sessions (which have not been published).
4. To delete the draft altogether: click on ‘Abandon Draft’, then click ‘OK’. Bizazz returns you to Pages – Select Website Article.

#### 4.5.4.3 Submit for Publishing Button

This is the *first step* towards publishing a draft webpage.

See Section 4.7.2.

#### 4.5.4.4 Save Article

Manually save the draft article every time that you leave the editing page. If you don't want to retain some/all changes from this session, undo them.

1. Click on 'Save Article' at bottom right of the Edit Article page.
2. You can continue editing this draft, or go to another part of Bizazz, or close Bizazz. The draft page is still signed out to your name.
3. To save a draft, but not keep it signed out:
  - a) use the Status box (Section 4.3.6);
  - b) select 'Deferred';
  - c) save the article.
4. To save a draft and sign it out to someone else: see Section 4.3.7.

#### 4.5.4.5 Notes Section

Type a message here for other cms users who will check this draft.

See Section 4.3.7 to re-assign the draft, and some important info to include here.

## 4.6 Create New Webpage

### 4.6.1 Introduction

To set up a new webpage, go to 'Website – Pages' and click on 'Add New Webpage' at the top of the form. Bizazz will take you to a blank webpage editor.

You will need to complete a page title and choose a page template *before* entering any content.

There are several other essential items, to create any webpage.

Work down through this section carefully.

### 4.6.2 Save Your Draft

A new webpage that you are working on has no saved versions anywhere in Bizazz (eg in Archives). What you see is the only version in existence.

Even if you have worked on this page before, the earlier drafts are not retained in Bizazz. Only published webpages can be archived; the archives would be huge if every draft page went in there.

Even if you have made changes that you aren't happy with, always save the draft before you close it. Don't 'Abandon Draft': you will lose the article altogether. Use 'Undo's to remove changes you don't want.

See Section 4.5.4.4.

## 4.6.3 Webpage Titles

### 4.6.3.1 Introduction

1. Every webpage must have a brief, relevant, descriptive and keyword-rich page title:
  - a) this title appears in the browser tab, when the webpage is opened
  - b) it is the clickable title usually used by search engines to list your webpage, when it comes up on a search
  - c) a new webpage cannot be saved unless it has a page title. The page title automatically generates a filename (href) within Bizazz
  - d) page title is used by Bizazz to link each webpage with its associated articles (archived, draft, suspended or published versions)
  - e) the page title is used to direct links to a webpage on your site from other websites, and from other webpages on your own website.
2. AutoSave and Save Article cannot work if your draft article has no page title. Don't lose your work – *fill in a page title first*.
3. Aim for no more than 60-70 characters, including spaces.
4. As for metadescriptions, search engines often change their rules for length of page titles shown in search results.
5. Page titles strongly influence search engine indexing. Don't waste page titles, especially if you have a small website in a competitive industry. Eg 'Contact Neshama Welsh Pony and Welsh Cob Stud, Bolaro NSW' rather than 'Contact Us'.
6. You can change the page title while a new webpage is still unpublished, without harming search engine indexing.
7. Do not change a published webpage's title, unless it is unavoidable.

### 4.6.3.2 Changing Page Title

After a page title change:

1. You will need to update all links from other webpages to the altered webpage. Because these were manually created within the editor, they are not automatically updated.
2. Any links to this webpage from other websites will no longer work.
3. If the page has never been published, the href can be changed (Section 4.5.3.5).

#### 4.6.4 Page Template

The page template defines permanent features of a webpage:

- everything around each webpage's unique content (header, footer, menu style etc);
- the webpage's colour scheme and heading styles;
- presence/absence of a sidemenu;
- layout of ecommerce products.

The page template dropdown box is at lower left of the screen. It displays the template currently in use.

Select template for the new page before you add any content.

#### 4.6.5 Webpage Category

Select the appropriate Category (below Page Title). See Section 4.3.4.

If you do not know yet, select 'Not Categorised'.

#### 4.6.6 Menu

1. If your new webpage has the category 'Menu', you will need to nominate where the page fits in the menu structure.
2. If you don't, the new page cannot be saved. When you try to save it, you will get an error message. This protects you from creating webpages which are inaccessible to site visitors.
3. To create the menu location:
  - a) Complete the menu boxes from left to right.
  - b) Select a menu name from each dropdown box, or type in a new name if this page will be on a new branch of the menu.
  - c) At the correct menu level, type in a menu name for this page.

4. Menu names figure highly in search engine rankings. A menu name which contains keywords can be an advantage.
5. If your website has a topbar horizontal menu, menu names will need to be short to fit the space available. No more than 7 options is usual across the topmenu; otherwise it gets confusing for site visitors. There are a few sites where more than 7 menu items work well.
6. Side menus give scope for longer menu names. So do some forms of dropdown submenus.
7. If the webpage is to appear more than once in the menu, use Extra Menu (Section 4.3.5.2).

### 4.6.7 Google Description (Meta Description)

This is the text which usually appears under the webpage title, in search results.

1. It needs to briefly and accurately describe the webpage's content. The metadescription should flow on well from the page title, as they will be viewed and read together.
2. It should draw readers in, so that they want to visit this webpage more than the others listed before or after it.
3. Google and other search engines count metadescription length in pixels, not letters. They change their length requirements without notice.
4. Aim for maximum of 120 characters including spaces. Desktop search results can show more characters - up to about 160 - but mobile devices need shorter metadescriptions. It's usually better to go with something that will work for both.
5. Search engines compare this description to the first lines and major headings of the webpage. If the words don't match, they won't index the page and searches won't find it.
6. It is often easier to fill in the metadescription *after* writing page content. Revise it after major changes, or if you are not getting the response that you want from your webpage.
7. Sometimes in search results, Google replaces a webpage metadescription with its own, drawn from the content of the webpage and perhaps honed to the particular search. The best protection against this is to reflect prominent page content strongly in your description; but there is no guarantee that you will avoid this altogether.

### 4.6.8 Search Keywords

A few minor search engines may use this information to index your webpage.

List keywords and keyword phrases, separated by commas (not by spaces).

Eg: snowy mountains,skiing,snowboard,snow play

It may be sufficient just to copy page title into this box, with commas between keywords/key phrases.

## 4.7 Webpage Publication

### 4.7.1 Overview

When a draft article is completed, it is ready to 'submit for publishing'.

Bizazz has a multi step system for publishing changes to the actual website. It is designed for businesses/organisations where staff or members edit page content, but do not have authority to alter the website without approval:

1. A draft article is saved and submitted from the editing page to the Website – Publish page. It is listed there along with any other articles which have been submitted for publication, deletion or suspension.
2. The 'publisher' (a Bizazz user with permission to publish pages) opens the Website – Publish page.
3. The publisher checks and edits the draft (or multiple draft articles).
4. All or some of the listed articles are then published to the website.

If you are the only one who ever works on the website, there are still advantages to this system:

1. You can edit several pages in succession, and publish all your revisions with one click.
2. You can easily revisit an edited-and-submitted page for a final check.
3. You can make related adjustments to multiple webpages and then publish all the affected pages at once, to coordinate updates across the whole website.
4. The process gives time for that 'oh no' moment when you remember something that you meant to change, just as you click 'Submit for Publishing'.

### 4.7.2 Submit for Publishing

On the Edit Article page:

1. Check that the menu levels are as you want them.
2. Do the search keywords and Google description need to be updated, now that the page content has changed?
3. Minimise the Editor frame.
4. Click on ‘Submit for Publishing’ at the bottom right of the form.
5. Wait a few moments, until you see a message with green background at the *top* of the editor, ‘Web article [page title] has been saved and submitted for publication’.

Wait means wait! If you don’t, you will lose your entire draft (if it isn’t saved in an earlier version); or at least lose all the latest changes.

6. If you want to publish the page immediately, click on the Publish tab above the editor. It will take you to ‘Publish Website Pages’. Then follow the instructions in Section 4.7.4.

### 4.7.3 How Will My Webpage Look?

Despite their name, What You See Is What You Get webpage editors don’t always show webpages exactly as they will appear.

You can preview draft webpages:

1. Go to ‘Pages – Select Website Article’
2. Click on the page title of the draft article. Use the search function if necessary. (Section 4.2.4)

But some php pages cannot be displayed fully until publication. The preview will be incomplete, or generate an error message.

### 4.7.4 Publish a Webpage

#### 4.7.4.1 Publish All Listed Articles

1. To publish an article, it first needs to be submitted for publishing. (Section 4.7.2)
2. Then:
  - If you are on the cms editor page, or on another page within the Websites submenu, click on ‘Publish’ in the tabs at the page top.
  - Otherwise, go to the Bizazz main menu and click on ‘Website – Publish’.
3. This takes you to ‘Publish Website Pages’.

4. Your article is listed by its page title as ‘Submitted for publication’. The table on this page has been filled in automatically. There might be other webpages listed, also waiting for publication.
5. Click on ‘Publish all listed articles’.
6. Wait for the message ‘Article [page title] is published. x pages written to the website’ in the top section of the form.

As with submitting for publication, it is critical that you wait until the success message appears. It only takes a few seconds.

7. The previous version of a webpage is archived, as soon as the new version is published.
8. To view newly published webpages on your browser: remember to click ‘Refresh’ in the address bar if you already have the webpage open, or if you had it open recently.

#### 4.7.4.2 Publish Selected Articles Only

This feature is designed for multi-author websites with a nominated publisher.

1. To publish each article, they first need to be submitted for publishing. (Section 4.7.2)
2. Then:
  - If you are on the cms editor page, or on another page within the Websites submenu, click on ‘Publish’ in the tabs at the page top.
  - Otherwise, go to the Bizazz main menu and click on ‘Website – Publish’.
3. This takes you to ‘Publish Website Pages’.
4. To publish only some articles from the list, you will need to check and then publish the articles one at a time:
5. Click on a page title. The cms editor page will open.
6. Edit the draft as you wish.
7. Click on ‘Publish’ at the bottom right of the form, when you have finished editing. [There is no Abandon Draft button on this editor page; and ‘Submit for Publishing’ has been replaced by ‘Publish’.]
8. Bizazz will return you to the Publish page.
9. Wait for the message ‘Article [page title] is published. x pages written to the website’ in the top section of the form.

As with submitting for publication, it is critical that you wait until the success message appears. It only takes a few seconds.

10. Continue editing and publishing articles from the list.

#### 4.7.4.3 Search Articles Listed for Publication

If you have a long list of articles submitted for publication, use the Search function to locate particular drafts.

See Section 4.2.4 and Section 4.2.3.3.

#### 4.7.4.4 Republish Entire Website

This function rewrites the whole website to the server when:

- you have changed templates for a webpage; or
- your browser fails to refresh webpages properly via its ‘refresh’ function. If this fails to show the new version, clear cache in the browser and go to the webpage again.

#### 4.7.4.5 Re-indexing & Sitemap

1. After you have finished publishing your changes to the website, you may see this message:  
‘The website requires re-indexing, an operation that may take several minutes.’
2. It’s important to re-index after substantive changes to the site. Search engines such as Google use this information.
3. Click on the link ‘Re-index website’.
4. Bizazz goes through the entire website and all links, to index words and re-create the sitemap.
5. When you see a completed message at end of the indexing, return to Bizazz via the links at the top or bottom of the index.
6. You can see your website’s sitemap at:  
`yourdomainname/sitemap.xml`

## 4.8 Other Page Management

### 4.8.1 Suspend or Delete Webpage

1. Go to Website – Pages and sign out the webpage/article.
2. Click again on your name, to open the cms editor page.
3. In the Status box, select ‘Submit for Suspension’/‘Submit for Deletion’

4. Click on 'Save'.
5. Wait for the message at the top of the form:  
    'Web article [page title] has been saved'.
6. Click on the Publish tab, near the top of the editor page.
7. On the Publish page, the article is listed as 'Submitted for suspension' or 'Submitted for deletion'.
8. Click on 'Publish all listed articles'.
9. Wait for the message at the top of the form:  
    'Article [page title] is suspended/deleted  
    0 pages written to the website  
    x pages deleted from the website'.

### **4.8.2 Activate a Suspended Webpage**

1. Go to Website – Pages. Sign out the article.
2. Click again on your name, to open the cms editor page.
3. Make any changes that you want.
4. Click on 'Submit for Publishing' and follow the publishing process. (Section 4.7.4)

## **4.9 Website Menu Management**

### **4.9.1 Introduction**

1. In the main menu, go to Website – Menu.
2. This page displays the structure of your website's pages in menus, submenus, sub-submenus etc.
3. It also shows unpublished pages which have been assigned to locations in the menu.
4. Here you can:
  - a) re-order menu items;
  - b) rename menu items;
  - c) add a longer description to a menu item.
5. 'Expand all'/'Collapse all' shows/hides all submenus, down to the lowest level.
6. To show/hide the submenus of one menu item only: click on '+'/ '-' to the left of its name.

### **4.9.2 Order of Menu/Submenu Items**

To change the order in which menu/submenu items appear on the website:

1. Click on the box beside each (sub)menu item's name.
2. Number them in your preferred order, from 1 onwards.
3. (Optional) Click on 'Apply' at the bottom right corner to view check the re-ordered menu.
4. Click on 'Publish' to complete your changes.

### **4.9.3 Change Menu Names**

To change a (sub)menu name:

1. In Website - Menu, click on [edit] to the top right of the menu name. Open submenus via '+' or 'Expand all' if you can't find the menu name you want.
2. Re-type the name.
3. Click on 'Update menu item'. Bizazz returns to the main Website – Menus page.
4. If the same menu name appears in the menu more than once: change every occurrence.
5. Click on 'Publish' at the bottom right corner.



# 5 Webpages CMS II: Styles, Snippets & Tables

## 5.1 Snippets

### 5.1.1 Overview

#### 5.1.1.1 Snippets

1. The 'Insert Snippet' icon is on the top row of editing icons, to the right of link and anchor.
2. It adds more complex code to your webpage, eg:
  - columns
  - background panels
  - videos
  - Google maps
  - contact form
  - display a full quotation when a visitor hovers their mouse over a reference to it.
3. Snippet options and styling vary between websites. Some of the sections below might not apply to your website.
4. For some snippets, the editor frame only displays a 'placeholder'. This is a marked area indicating where the snippet sits on the page. The webpage will look right when it is published.

Eg a weather report snippet can't show an actual weather report within the Bizazz cms, only a grey box labelled 'Weather Report'.

#### 5.1.1.2 To Style Snippets

After you have inserted a snippet, you can align the snippet (left, right or centre aligned) or (for some snippets) adjust its look.

1. Use the styles to the right of the editing area (Section 5.2).
2. Do not use the cms editor icons to align a snippet. The styling tools do the job better for responsively designed websites.

### 5.1.1.3 Snippets Menu

1. Click on the Snippets icon to open the Snippets frame.
2. On the left, a column shows snippet options. There is a small menu above it. This menu is rarely needed.
3. Snippet menu options are:
  - *All Categories*: shows all snippets. Usually this is the default setting, but see below
  - *Layout*: most snippets will be in here for basic websites
  - *Microformat*: covers some specialised snippets.
4. When you insert a snippet within a snippet (eg a contact form inside a column), the Snippets menu defaults to Layout or Microformat, depending on the original snippet type.

Use the snippets menu to see more options, if needed.

## 5.1.2 Columns & Subcolumns

### 5.1.2.1 How Column Construction Works

1. A webpage is 12 units wide. Each unit covers a twelfth of a page, when viewed on a normal PC screen.
2. You will specify:
  - number of columns
  - their width in units
  - any offsets and their width.
3. All column and offset widths added together equal 12, and so make up the whole pagewidth.
4. Columns need not all be the same width.
5. Offsets (forced blank space beside, or in between, columns) are optional. There is a nice margin around all columns in the default settings for Bizazz.
6. Nonetheless, you might want a left or right offset to create negative space. This can help to make a webpage visually appealing.

7. On narrow screens (eg phones), the rightmost columns move underneath left columns.
8. Offsets are overridden (disappear) on smaller screens. This makes best use of limited screen area, and keeps columns evenly aligned as they ‘stack’ one beneath the other.

### 5.1.2.2 Creating Columns

1. Create the column layout on a blank line of the editing area.
2. Click on the row where you want your columns to start.
3. Click on ‘Insert Snippet’ and ‘Insert Columns’.
4. Select the number of columns you want.
5. Set any left offset width.

Often the left offset is 0, but a blank space might enhance your page layout.

6. For each column, specify its width in units.
7. If you want a blank area to right of the last column: create columns which add up to less than 12 units wide. The remaining units will become the right side offset.

Eg: left offset 2, 1st column 4 units wide, 2nd column 4 units; right side offset will automatically be 2.

8. If you go *over* 12 units:, Bizazz will give a warning message. Fix your arithmetic.
9. If you go *under* 12 units: Bizazz will create the columns, with an offset to right of the rightmost column. This will be a forced blank space, which cannot be filled with text or graphics.

If that is *not* what you want to happen, add another column and get the total up to 12 units.

10. When you have finished your specifications, click on ‘Insert’.
11. You will see the columns marked out in the editing area, edged by broken lines. These lines won’t show on the published webpage.
12. You will insert all content *after* building the columns; see Section 5.1.2.3.

Note: If you want a larger offset than the default setting *in between* columns, contact SuttonNet.

### 5.1.2.3 Adding Content to Columns

1. In the editing area, click inside a column and fill in its content.
2. This need not be text only; you can include photos, links, buttons etc.
3. Use heading styles and the other editing icons within each column, as you want.
4. Your columns will grow as long as needed, as more content is added.
5. If the website is designed to be mobile friendly, columns will rearrange themselves to fit when viewed on smaller screens; right hand columns will move underneath the left hand ones.

Bear this in mind when creating and editing content:

- Does the flow of information make sense in *all* layouts?
- Does important information stay prominent, or has it moved way down the page where it might never be seen?

### 5.1.2.4 Adding or Removing Columns

1. To add more columns:
  - Click in the column to the left of the new one.
  - Click on ‘Insert Snippet’, ‘Insert Columns’.
2. To delete a column: click in the column and press Delete:
  - All content will move into the next left column, below the existing content.
  - If it was the leftmost column that you deleted, its content will move into the next column to the right.
3. To remove column styling altogether:
  - *First paste all columns’ content* to another area of the draft webpage, unless you want to delete all the content too.
  - Delete the area marked with dotted lines.
  - If you have access to html code and are confident with using it: check that *all* column code has been removed.
  - If not: if you run into any problems, contact SuttonNet.

### 5.1.2.5 Subcolumns

Once you have created columns:

- Click inside a column.
- Click on ‘Insert Snippet’, ‘Insert Columns’ to subdivide that column.

The process is the same as for creating columns, except that the 12 units are a *column-width*, rather than a pagewidth.

## 5.1.3 Snippet Panels & Panel Lists

### 5.1.3.1 Overview

1. A *panel* is a bordered area of text and other content, which can have a coloured background.
2. A panel usually stretches across a full page or full column width.
3. Panels are usually created using the right hand styling tools (Section 5.2.4). But some websites also have a snippet for special panels.
4. All panel styling is customised for your website. Eg:
  - distinctive heading and text sizes/colours for panels
  - one or more background colour options
  - radius effect on background colour.
5. A *panel list* produces panels of even width, set across the webpage and continuing in rows down the page as far as needed. This is typically used for entries in a directory, events listing etc.

### 5.1.3.2 Insert Panel

1. Click on the row (and if applicable, click within the column) where you want the panel to start. The panel *top* will be level with this row.
2. Click on ‘Insert Snippet’, then ‘Insert Panel’.
3. Choose a panel style from the dropdown box, if you have more than one option. (For Foundation5 websites only: A *callout panel* is in an eye-catching colour, to draw the reader’s attention.)
4. Tick ‘With Title’ if you want a preset panel-heading style in the panel.
5. Click on ‘Insert’.

6. Remember that you can change the colour and styling later, using the styling tools at the right of the editing area to create rounded corners, change colours &c.
7. Type or paste in text, add photos etc.
8. If your panel has special heading and text styles:
  - Type your text *into* the existing sample text, to ensure it acquires the same format.
  - Only delete the sample text *after* you have added some text of your own. Then you won't delete the essential styling code along with the unwanted text.

### 5.1.3.3 Insert Panel List

1. A panel list is a series of matching panels, which may have a title area and text area in a preset font style and size.
2. A preset number of panels appear beside each other across a full sized screen. The rest of the panels follow on in successive rows below the first.
3. Panels in the list re-arrange and re-size themselves on smaller screens, until they become a vertical list of narrow panels on a mobile phone.
4. You can add extra panels anywhere in the list, at any time. This allows you to maintain structure within the list (eg alphabetical order of panel heading, date order for events).
5. Position the cursor where you want the first item. The *top* of the first row of panels will be level with this row.
6. Click on 'Insert Snippet', then 'Insert Panel List'.
7. Choose a panel type from the dropdown box, if you have more than one option.
8. Click on 'Insert'.
9. To add the panel heading and content:
  - Type your text *into* the existing sample text, to ensure it acquires the same format.
  - Only delete the sample text *after* you have added some text of your own. Then you won't delete the essential styling code along with the unwanted text.

### 5.1.3.4 Add Panel to List

To add another item to a panel list:

1. Click inside the panel which is *next* to where you want the new panel to go (either before or after it).
2. Click on 'Insert Snippet'.
3. Select 'Add Panel to List'.
4. Complete the options:
  - new panel goes before or after the current one
  - panel colour.
5. Click on 'Insert'.
6. To add the panel heading and content:
  - Type your text *into* the existing sample text, to ensure it acquires the same format.
  - Only delete the sample text *after* you have added some text of your own. Then you won't delete the essential styling code along with the unwanted text.

#### 5.1.4 Insert Product Area

1. Some webpage templates use a snippet to insert a placeholder to mark the section where ecommerce products appear on the webpage.
2. Product details display automatically, after being uploaded to the website products database (??).
3. Click on 'Insert Snippet', then 'Insert Product Area'.
4. The dialog may ask you to select a product category or classification. This allows you to display only a subset of your products on one webpage.

#### 5.1.5 Add/Edit Image Caption

See Section 9.3.2.3.

#### 5.1.6 Insert Google Map/Embed code

Use the snippet 'Embed Code':

1. to add a Google map to a webpage
2. to embed a video or audio file from Youtube, Spreaker etc.

Make sure that you comply with any copyright restrictions; eg Google Maps must display the Google credit correctly.

To insert the map, video etc into your webpage:

1. Open the cms editor page for the webpage which will contain the snippet.
2. Click in the row where you want the map to go. This row will be level with the *top* of the map.
3. Go to ‘Insert Snippet’, then ‘Embed Code’.
4. In another tab on your browser, follow instructions on the website where the video, audio etc is displayed, to obtain the required code.
5. Copy and paste the code into Bizazz at ‘Paste body code’.
  - Spreaker has 2 portions of code. Paste the longer one here, and paste the shorter one (which starts with `<script async`) into ‘Paste header code’ .

6. If there are any double quotation marks used *in the link text*, edit them in the body code box.

Eg: Listen to our latest recording of John Sutton playing “Twinkle Twinkle Little Star.”

becomes: Listen to our latest recording of John Sutton playing &quot;Twinkle Twinkle Little Star.&quot;

If you don’t do this, the double quotes will be interpreted as html code, not as text; and the embedded code won’t work.

7. Make any further adjustments required for html 5 protocols, as described below. Do NOT skip this step. Contact SuttonNet if you need help.
8. Click on ‘Insert’.
9. A placeholder will appear in the cms editor frame.

#### *Google Maps Instructions*

First define the map that you want, then copy that map’s code to the snippet and adjust for html 5 protocols.

1. Go to Google Maps: <http://www.googlemaps.com> or use your Google account and My Maps.
2. Go to the map of the area you want, zoom to desired shape and view.
3. If there is a red shaded or outlined area and you don’t want it, try zooming in until it disappears.
4. Click on the left white menu icon (in the corner where you normally type in a search location).
5. Select ‘Share or Embed Map’; then ‘Embed Map’.

6. Re-adjust the map size and shape to best fit, by:
  - moving the map around
  - using Medium, Large etc options
  - zooming in or out.
7. When you are satisfied, click on the *iframe code* above your map. It will now be highlighted.
8. Copy the code in there & paste it to the snippet 'Paste code here' box.
9. Go through the code carefully and find:  
`allowfullscreen`
10. Alter this to read:  
`allowfullscreen="allowfullscreen"`

#### *Other Code Instructions*

For a Youtube video:

1. Go through the code carefully and find:  
`allowfullscreen`
2. Alter this to read:  
`allowfullscreen="allowfullscreen"`

For Spreaker audio:

1. At the start of the code which you pasted into 'Paste header code', find:  
`<script async`
2. Alter this to read:  
`<script async="async"`

## **5.1.7 Insert Bizazz Form**

### **5.1.7.1 Overview**

This snippet is used to insert an online form into a webpage. A form can comprise all or part of a webpage.

A webpage form cannot work unless everything is set up correctly.

1. To create or edit a form: see Chapter 14.
2. For a new form, set up a campaign and event (Chapter 15). Otherwise nothing will happen after a site visitor submits the form.

### 5.1.7.2 Response Webpages

Each form needs a linked *response webpage* for the site visitor to see after they submit the form. This assures them that the form has gone in successfully.

1. Check under Website – Pages whether there is a suitable webpage already on your site:
  - a) Look through nonmenu pages on the Pages list of webpage articles, particularly ones with page titles like ‘Thank you...’ .
  - b) sign out the webpage to check the text really does say what you want. You are probably after, ‘Thank you for contacting Dizzy Lizzy’s...’ rather than ‘We will ship your order within 48 hours...’
2. If there is nothing suitable, create a new webpage. *Don’t edit* any of the other pages; they are likely used elsewhere on your site.

### 5.1.7.3 Create New Response Webpage

1. Click on ‘Add New Webpage’.
2. Create and publish a new webpage (Section 4.6), with:
  - a) a recognisable page title to assist with later editing (Confirmation, Thank You for Contacting Happy Ponies Sleepwear etc)
  - b) nonmenu
  - c) a page heading to bulk the page out; this looks better than one line of text overwhelmed by the webpage header and footer
  - d) one or two sentences, saying that you will respond etc.

### 5.1.7.4 Insert Form

1. Open the cms editor page for the webpage which will contain the form.
2. From the Snippets list, select ‘Insert Bizazz Form’.
3. Choose the right form from the dropdown box.
4. Type in the text that you want to appear in the ‘Submit form’ button. Often this will just be ‘Submit’, but you can wax creative.
5. Click on ‘Browse’. Select the correct response webpage from the list of non-menu pages.
6. Click on ‘Insert’.

The cms editor frame will display a placeholder for the form.

### 5.1.7.5 Test Form

It's important to *check the final result* after the webpage is published:

- Has the form come out correctly when published, or have you have missed some steps along the way?
- Does it look as good as it should? Do some fields need to be bigger, smaller, re-arranged? Does it need any explanatory text above the form?
- Test the whole set up: what happens when you fill the form in and submit it?

### 5.1.8 Accordion

An accordion hides information which you don't expect all readers to read. It's most often used for questions & answers (FAQ's).

Each question or starter heading has an arrow which when clicked on, shows more information just below and hides it upon a second click.

A Bizazz accordion is a series of question+answer sets in preset styling. When you click inside the accordion header, check under 'Accordion' in the right hand column to view more styling options. Default is:

- usually h4 for the headers: perhaps with a distinctive colour but if not, in the text-link colour used elsewhere on your site. You can override the heading size if you want;
- normal text for answers. You can also include more complex content such as tables & links;
- you may have an option to insert an icon in each header, using the right hand styles;
- an open/shut arrow for each header, in one style selected when your website was built. To change this style, contact SuttonNet (custom design fee applies).

To create an accordion:

1. Click on the webpage where you want the accordion to begin.
2. In snippets, select 'Insert accordion'.
3. Type the heading or question into the accordion heading area. Start a new paragraph in normal text style for each answer/hidden text. Continue for each Q&A pair.
4. Delete dummy accordion entries if there are more than you need.
5. Add more accordion entries by copying accordion code in the html view onto following lines.
6. Style using the right hand column Accordion options, if needed.

## 5.2 Styling

### 5.2.1 Overview

#### 5.2.1.1 Tools for Responsive Design

1. In the right hand column, there are tools for styling elements on a webpage, such as:
  - turning link text into buttons
  - colouring panels
  - creating photo borders
  - changing text colour (restricted options to keep the website consistent).
2. If your site was developed using responsive design, or if it has a simpler mobile version, you will find either Twitter Bootstrap or Foundation5 tools here. These produce mobile phone friendly styling.
3. Some of the styling tool functions overlap with the editing icons (Section 4.4). Those editing icons were developed before website design for mobile phones was the norm. Amazingly, they still work for much of today's website editing.
4. The right hand styling tools are specially designed for responsive websites. They help ensure that complex content responds correctly on all types of devices (eg that a photo will not be separated from its caption, as the webpage re-arranges itself for a phone screen).

#### 5.2.1.2 Styling Tools Selection

1. The range and ordering of tools in the right hand column depends on each website's design and on the version of mobile friendly software which it uses.
2. This manual covers the most common and the most difficult tools. Contact SuttonNet if you need more help.
3. The list of styling tools might change, after you have clicked on or highlighted content. Eg some image tools only appear after you have clicked on an image. Look carefully for any new options.

#### 5.2.1.3 Apply a Style

1. Click on a block of content (eg paragraph, image, snippet, link).
2. Select a styling tool.
3. The style will be applied to the whole block.

To *change an existing style to a conflicting one*, eg change from right aligned to left aligned:

1. Always click on the old styling tool first, to turn it off.
2. Then click on the new style.

This avoids messy and even corrupted html code accumulating, which can make your webpage look strange.

If (when!) you forget to undo styles:

- remove *all* styling from that portion and start again;
- if you have access to html code, check that it has all cleared correctly. (Section 4.4.4.13)

#### 5.2.1.4 Remove a Style

Click on a block of content.

All the styles applying to that block are now highlighted in the right hand column.

Click on the style which you no longer want. The highlighting will turn off and the style will be removed.

### 5.2.2 Snippet Alignment Tools

1. Click on or highlight your snippet (eg video) in your webpage to align it: left justified, right justified or centred on the webpage.
2. If your snippet is inside a column (eg a panel within a column), the styles are applied relative to that column.
3. Remember to click on the old alignment style to turn it off, before trying out a new alignment.
4. Warning: Some snippets are built as ‘snippets within snippets’ (divs within divs, for the html minded). If you don’t get the result you were expecting, this is usually the reason: the styling has applied to an outer or inner level of ‘divs’.

Some clients don’t have access to correct the page html code. Even if you do, call SuttonNet for help unless you are savvy with code. It can be tricky working out which div marker belongs to what.

### 5.2.3 Buttons & Other Links

#### 5.2.3.1 More Information Link

1. This styling tool displays the words ‘More info...’ on a webpage, in link-coloured text. (The colour depends on your page template). When a site

visitor clicks on this link, hidden content will be shown, along with a ‘Hide info’ link.

2. Accordions or tooltips are now more popular than ‘More info...’ for managing layers of detailed content.
3. Hiding some text is useful:
  - a) for good information flow on the webpage, without bogging every reader down in detail; or
  - b) if you feel the webpage looks too long.
4. If you want different wording for a ‘More’ link, or would like accordion styling for your webpage, contact SuttonNet.
5. To use this style:
  - a) Click within a paragraph and select ‘More info’ to hide the *whole paragraph* behind a ‘More info...’ link.
  - b) To conceal only *part of a paragraph, or more than one paragraph*:
    - Highlight the entire text block.
    - Click on ‘More info’.
6. You can also turn your ‘More info...’ link into a button (see next section).

### 5.2.3.2 Button Shapes

1. Click anywhere on a link and select ‘Button’ style to display the link as a button.
2. Once you have done this, you can modify the button’s shape:
  - *Radius* rounds the button’s corners
  - *Round* rounds the button’s left and right ends
  - *Tiny* shrinks the button and its text
  - *Small* is the next step up in size
  - *Large* – you guessed it.

Remember to turn off one style before trying out another which conflicts with it.

### 5.2.3.3 Button Colours

Colour styles appear in the right hand list whenever you click on a button, or just after you have created one.

*Success*, *Alert*, *Callout* (= call to action), *Secondary* all change the button to preset colours which are conventionally used on webpages for particular purposes.

Eg green for ‘you have successfully completed your transaction’; red for ‘warning’.

Don’t forget to turn off one colour before trying out another which conflicts with it.

### 5.2.3.4 List Button Group

1. This styling option only shows up when you have highlighted or clicked inside an unordered list (ie dot points; see Section 4.4.4.7).
2. It creates a connected row of links, in button styling. You need to follow these instructions exactly.
3. To create a row of buttons:
  - (i) Type their text with Enter between each and create an unordered list (dot points), with one dot point corresponding to each button.
  - (ii) For each dot point: highlight the text and turn it into a link; then click in the link and turn it into a button.
  - (iii) Click anywhere in the list and click on ‘List Button Group’.
4. You can apply styles (eg colour, radius) to individual buttons in the horizontal list.
5. Alternatively, you can use the colour, radius or round options under ‘List Button Group’, to style the group as a whole:
  - ‘Round’ will then apply to the left side of the first button and right side of the last button in the row, instead of rounding both sides of each button.
  - All buttons will be the same colour.
6. *Stack* displays the button list as a vertical stack of connected buttons, on *all* screens.
7. *Stack-on-Small* ensures that a horizontal button group will display as a vertical stack on *small* screens.
8. Beware of creating wide button lists; they may not fit onto a small screen, if you do not use a Stack option. In any case, a wide row of button options is not likely to be user friendly.

### 5.2.4 Panels

1. A *panel* is a bordered area of text and other content, which can have a coloured background.
2. A panel usually stretches across a full page or full column width.
3. Highlight a section of content and select ‘Panel’ style.
4. After you have created a panel and clicked inside it, panel style options will be displayed at right, indented under the selected ‘Panel’ or similar heading. Don’t forget to turn off an unwanted style before trying out a conflicting one.
5. Your styling options might include various colours.
6. Radius also applies to panels, to round their corners.
7. Some websites have special panels which are created via snippets (Section 5.1.3). You can still modify the panel, using the styling tools. This is quicker than going back into Snippets.

### 5.2.5 Yellow Highlight

This tool adds a yellow background to text which you have highlighted.

### 5.2.6 Quote

Highlight indented text (Section 4.4.4.9). Then use this styling for prominent quotation marks, to feature a quotation.

### 5.2.7 Un-bold

Some heading styles (Section 4.4.4.5) are bold by default.

- To remove bolding from a heading, click anywhere along it and select ‘Un-bold’.
- To remove bolding from *part* of the heading, highlight that portion and click on ‘Un-bold’.

### 5.2.8 Unordered List Styles

When you highlight an unordered list (dot points: Section 4.4.4.7), you will see styling options:

- square bullets

- (open) circle dots
- (filled) disc – overrides the default option (circle) for second level dot points
- no bullet
- inline list – sets out as many points as will fit across each row, with a space between them
- list 2, 3 or 4 points per row with a space between them, and no dots
- turn all points into links and list button group (Section 5.2.3.4).

Turn off one style before trying a conflicting one.

If you choose inline list, it will change on narrower screens. Check on different sized screens that the points re-arrange in the way you want. If they don't, there are several ways to produce a similar [desktop/wide screen] look to inline list; they have different layouts on smaller screens. Contact SuttonNet for the best approach for your webpage.

### 5.2.9 Table Alignment

To align a table on the webpage, click on it and select from 'Table Left Aligned', 'Table Right Aligned', 'Table Centre Aligned'.

### 5.2.10 Justify Text

'Text Left/Right/Centre' and 'Text Justify' are like the text alignment/justification icons in the toolbar above the cms editor frame.

Use these if you are following the Foundation5 manual.

### 5.2.11 Labels

#### 5.2.11.1 Introduction

1. A *label* looks like a small button with small text. But a label is not a link.
2. A label is an 'inline box', ie it sits within a paragraph/block of text.
3. Labels are used for 'asides', eg:
  - a bibliographical reference (ABS Census 2011)
  - date of last update to this section of content (Last updated dd/mm/yyyy)
  - an attention-grabbing note at start or end of a paragraph (Warning, Update, Tip, Don't Forget!, For Pro's...)

4. You can have an icon in a label, with or without text, as long as the icon is small enough to fit.
5. To minimise confusion with links, use labels only when their purpose is clear. You don't want site visitors thinking your website is broken.

#### 5.2.11.2 Create the Label

1. Type the block of text.
2. Highlight the text that you want as a label.
3. Select 'Label'.

#### 5.2.11.3 Style the Label

1. Labels can be reshaped or re-coloured.
2. Click on the label.
3. Use the styling options indented under Label.
4. Remember to turn off a style before turning on a conflicting one.

### 5.2.12 Reveal Widgets/Flyouts

#### 5.2.12.1 Overview

1. A *reveal panel* or *flyout* is an overriding panel which comes up in front of the webpage, dimming the background page.
2. By default, the panel only appears if a site visitor clicks on its link. Contact SuttonNet if you want a flyout to appear whenever the webpage opens.
3. The reveal panel has text and a 'close' ('X') button.
4. Flyouts are useful when it is important to read specific content carefully, before proceeding any further. The original webpage cannot be read at all, until the visitor has (hopefully, read the panel text and) clicked on X.
5. Don't overuse them, or they become annoying.
6. To create a reveal panel, work through these steps in order:
  - a) Type the text that will be the link to open the reveal panel.
  - b) Press Enter to go to the next paragraph.
  - c) Go to 'Insert Snippet', then 'Insert Reveal Panel'.
  - d) Give the reveal panel a meaningful name (no spaces).

- e) Click on 'Insert'.
- f) The reveal panel is now shown in the cms editor frame. Type its content.
- g) Highlight the text from (a) above.
- h) Click on the link icon, then click 'Anchor-Link'.
- i) Select the correct reveal panel name.
- j) Click 'OK'.
- k) While the link is highlighted (if it is not already selected, then click on it), select 'Link to reveal panel' in the right hand style column. This will style the link text specifically as a reveal panel link.

### 5.2.13 Insert Label

Labels use a combination of styling tool and snippet functions.

See Section 5.2.11.

### 5.2.14 Insert Reveal Widget

Reveal panels use a combination of styling tool and snippet functions.

See Section 5.2.12.

### 5.2.15 Equalise Column Lengths

This handy tool sets columns with boxed or listed (dot point) content to the same length. It tidies the page layout markedly.

1. Highlight the columns.
2. Select 'Equalizer' (in the Callout (Panel) area of the right hand styles).
3. Click in each column and select 'Column'.



# 6 Photos & Other Images

## 6.1 Website Images

### 6.1.1 Quality Counts

1. Images are photos, drawings, sketch maps, cartoons... but not Google maps.
2. A picture tells a thousand words; but poor quality or badly chosen images drag down a website's speed, professionalism and communication with readers.
3. Faster Internet and changing expectations mean that modern websites tend to use large images, and plenty of them. If your business isn't photogenic (eg IT), a stylish site is still achievable. Some well executed line drawings might do more for your website's impact than resorting to filling the gaps with second rate photos.
4. Effective website images need time, skills, planning and a good eye for image quality and page layout. Get help if you need it (professional photographer, SuttonNet). See Section 6.4.
5. Don't compromise on details like alignment and text wrapping. See Section 9.2, Section 9.3.1.2, Section 9.3.2, Section 9.3.3, Section 9.3.2.3.
6. Put care into image titles and alternate text (Section 9.1.3). They help the webpage's search engine rankings and can bring more visitors to your website via different searches.

### 6.1.2 From File to Website to Webpage

To get a photo onto the right page of your website is a multi step process:

1. Obtain photos with the right subjects and select the best quality ones
2. Rename image files with meaningful names
3. Enhance photo quality, contrast etc
4. Adjust photo size
5. Load images to the website's Bizazz system. The uploaded files are stored on SuttonNet's web server. (Steps 3-6 are a single process when using the Bizazz photo processor)

6. Rename files of some photos loaded to Bizazz
7. Position each image on a webpage (This is automatic for e-shop or gallery pages)
8. Add accompanying larger images, borders, titles etc.

See Section 6.1.3 for estimated time per photo.

Section 6.4 gives tips on photo quality and sizing for a webpage. See Section 6.5 for more on photo processing.

Note: The website backend cannot be used as a photo backup facility. A web server is designed for *fast* data transfer, not backups. Massive data storage on any website hinders a web server from working well, affecting your website and other clients' sites.

- SuttonNet may suspend a website or delete unused photos or other files from it, if we find that it is storing many unpublished photos.

### 6.1.3 Multiple Images: Task Overview

Many websites need multiple photos for ecommerce products or for photo galleries. Adding a large number of photos is a major undertaking.

Multiply the steps needed by the number of photos you need for your website, to get an idea of the time involved:

- A single image may take from 5–20 minutes, depending on how much processing it needs.
- For multiple photos, it is far quicker to use the Bizazz inbuilt photo processor. (Chapter 7)

It's better to be accurate, particularly with file naming, than quick but careless.

It takes time to learn processing, loading and image file management techniques. It may be more cost effective for you to have SuttonNet to process and load your photos. Consider:

- levels of time and energy you have
- what else you could profitably do with that time
- likely quality of resulting photos
- delays in updating the website or getting a new website ready to publish.

### 6.1.4 Which Method to Load Your Images?

1. Photos and other images can be uploaded to Bizazz any time, and inserted into webpages at a later date.

2. There are two ways to upload *general webpage photos* to your website:
  - a) Fastest and easiest: via the Website version of the inbuilt photo processor (Chapter 7):
    - Many photo/image filetypes are accepted by the Bizazz processor. If it doesn't accept yours, then use method 2(b);
  - b) For an unusual filetype, or an image that needs special processing: use the cms webpage editor: Insert Image dialogue box. (Section 4.4)
3. Similarly, for *product (e-shop) and photo gallery images*:
  - a) Fastest and easiest: via the Products version of the inbuilt photo processor (Chapter 7):
    - Many photo/image filetypes are accepted by the Bizazz processor. If it doesn't accept yours, then use method 3(b);
  - b) For an unusual filetype, or an image that needs special processing: load via Products – External Files. (??)
  - c) To set up and manage a photo gallery, see Section 11.2.
4. *Images linked with particular online contacts* are loaded via Contacts – External Files. (Section 12.3.4)
  - Eg a member's ID photo, a client's photos of curtain colours to be matched.
5. The cms editor/External Files methods *must* be used for images which require more than basic adjustment. This is done using your own photo processing software. (Section 6.5)
6. Do not load image files via file transfer protocol (FTP), unless SuttonNet has advised you otherwise (Chapter 10). It is an old method and it and needs extreme care.

## 6.2 Image Management

### 6.2.1 Image Files and Folders

#### 6.2.1.1 Overview

1. How well you name image files, and group the images into folders, is critical for how easily you (and other cms users) will manage your website in the years to come.

2. Bizazz holds every image uploaded to it, whether published on the website or not.
3. For information on selecting the right image folder, see Section 6.2.1.6.
4. If you delete images *from a webpage* (Section 9.4), they will still be stored in the website backend. You will not need to reload them to Bizazz, unless you need a different size, cropping or quality.
5. Delete photos *from the Bizazz system* from time to time, to keep photo files and folders up to date:
  - a) For general webpage images, see Section 9.5.2
  - b) For product images, see ??
  - c) For gallery images, see Section 11.3.5.3.
6. To edit product or gallery photos' Catalogue name, Title, Alt Text and Description: see ?? or Section 11.3.5.

#### 6.2.1.2 Manage Original Images (Your Computer)

1. There are photos onto your computer:
  - from your camera, tablet or phone
  - from a CD, email attachment or memory stick
  - downloaded from a reputable website, with copyright permission.
2. Name or rename each photo/image file which you want for your website. Save each file under the new name. This will be much faster to process than wading through IMG543, IMG544 etc.
3. Create an '/original' subfolder under 'website/images', 'yourdomain/photos' or similar folder.
4. Store all the original (unprocessed) photos for the website within this '/original' subfolder, in appropriate subfolders. This will speed up loading them onto the website.

#### 6.2.1.3 Manage Processed Images (Fast Photo Processor)

When using the Bizazz photo processor, it's easy to copy photo files in bulk, straight from your website/photos/original folder:

1. This saves hunting around your computer files for the right photos.
2. After the images are processed, name the new files using comparable filenames and subfolder system to the originals:

- Then you can trace the original source images easily. This will be important if you ever need the same image in a different size, or processed differently.
  - Filenames for original and processed versions might not be exactly the same. One original image file might have several corresponding processed versions, eg:
    - large + small sizes
    - a small detail cropped from a scene
    - a monochrome version.
3. You will select the right subfolder of the website backend to load photos into, before you process/load them.
  4. The photo processor leads you through filenaming.
  5. The processor automatically names the large version of each thumbnail + large pair of photos.
  6. The processed image files are stored immediately in the website backend, rather than on your own computer.

#### 6.2.1.4 Manage Processed Images (Your Computer)

For loading images *without* the Bizazz photo processor:

1. Each image is processed offline, using your own photo processing software. (Section 6.5)
2. The processed versions are saved as new image files on your computer:
  - a) under the same ‘website/images’, ‘yourdomain/photos’ or similar folder as for the originals
  - b) in a separate subfolder to the originals (eg ‘/processed\_images’); but with comparable names and subfolder system. Then you can trace the original source images easily.
    - This will be important if you ever need the same image in a different size, or processed differently.
3. One original image file might have several corresponding processed versions, eg:
  - large + small sizes
  - a small detail cropped from a scene
  - a monochrome version.

So the filenames for original and processed versions might not be exactly the same.

4. When the files are loaded (copied) from your computer onto Bizazz:
  - use similar or the same names as for the processed images on your own computer
  - the uploaded files are stored in the website backend (on a SuttonNet web server).

#### 6.2.1.5 Naming Image Files: General

1. Set up an easy folder system.
  - A website can acquire from 10 - 10 000 images, loaded from multiple computers. You don't want to waste your (or your staff's) time sifting through them, either in the business computers' filing systems or in Bizazz.
2. Don't rely on personal associations when naming files (eg 'my-great-disaster.jpg'):
  - Will you remember which great disaster it was, 6 months later?
  - You might not always be the only one updating the website. Even a sole proprietor business can be sold, or SuttonNet might do work on this part of the website.
3. Filenames need to be:
  - unique
  - specific
  - meaningful in relation to other images you have now, or are likely to add in future. You will not remember in a year's time whether 'Lake Eucumbene-12.jpg' is the photo with snow in it.
4. Dates within filenames can help distinguish between images, eg current vs last year's committee photos.
5. Use - (hyphen) between words, in your folder, subfolder and file names. Do not leave spaces.
6. Use all lower case in folder and subfolder names. This helps SuttonNet when we are troubleshooting, or working on your website: eg programming.

Here are some examples:

1. products/item-12.jpg *or* products/item-12-Dunking-Widget.jpg

2. product-412/front-view-orange.jpg *or* saddles/412-side-view-on-horse-04-02-2015.jpg

Either naming system allows for multiple views of product code 412.

3. diane/ponies/Neshama-Over-the-Moon-first-ride-1.jpg

diane/ponies/Neshama-Jack-Flash-18-months-3.jpg

This folder structure works for our website. There are few photos, and pony photos are mostly used on 'Diane's Page'.

4. lake-eucumbene/snow-on-hills-06-July-2014.jpg

Photos with a similar theme can be similarly named even if there aren't enough to warrant a separate folder.

When adding a new page, you can quickly browse through and select from your website's library of lake-eucumbene/snow... photos.

5. big-trout/31-12-2014.jpg

The Big Trout sculpture has been repainted many times over the years, with different looks. Photo dates sort current from previous incarnations:

- Dates help ensure that main tourist webpages only show the latest version.
- They facilitate a Big Trout timeline gallery, for a local history page.

#### 6.2.1.6 Bizazz Image Folders

1. Every image file is loaded as a separate file into a specified folder in the website management system. Small+large versions of a photo are linked in Bizazz, via a filenaming convention for the large version. Large versions are named automatically if you use the Bizazz processor.

- a) Some image folders have been preset for your website. You can create new ones.

- b) Each image folder has:

- i. a unique name (relevant to the photos that belong in it)

- ii. a standard photo size (see Section 6.3.2).

- c) Naming images and grouping them sensibly into folders is important for keeping your website manageable.

- d) It's easier to upload photos quickly if you have planned image folder names for your website, and filed the images on your own computer similarly. (Section 6.2.1)

- e) Your first step when loading a photo is to:

- select the right folder from the dropdown box (Section 7.3.1.1), or

- make a new folder or subfolder (Section 7.3.1.2).
2. You can load photos in one batch using the Bizazz fast processor, if they are all heading in to the same folder. To load photos for more than one folder:
    - process them in several batches, and
    - reset the target folder between each batch.

## 6.3 Sizing Photos for Webpages

### 6.3.1 Overview

1. You need to decide on each photo's size *before* loading it into Bizazz. After a photo has been loaded, you cannot alter its size.
2. This requires some idea of how you want the webpage to look. How much of the page will the image occupy?
3. Photos on webpages are larger now, as Internet providers offer faster and cheaper data transfer for many locations.
4. Image size is specified in pixels as viewed on a full PC screen.
5. On a responsively designed website, images are moved around the page and reduced to fit on smaller screens.
6. As a guide:
  - For full pagewidth if your webpage has a side column (eg used for a submenu), allow c700 pixels wide.
  - For full pagewidth on a webpage without side columns, allow c1000 pixels wide.
  - Many photos are a nice clear size at 250-300 pixels in width &/or height.
  - Thumbnails might be no more than 200 pixels high or wide.
  - Enlarged versions of smaller photos are usually 800-1000 pixels high or wide.
7. For standard (preset) photo sizing for website image folders: see Section 6.3.2.

### 6.3.2 Preset Photo Sizes for Folders

1. Each photo folder has a default photo size, expressed in pixels (width x height). This is the *maximum* size which each image occupies on a full PC screen.

Eg: ‘products’ folder could have small photos sized 250 x 300 pixels and enlarged versions of these photos at 750 x 900 pixels.

2. Not every photo can be cropped to this exact size. At least one dimension (width or height) will be matched to the default setting.
3. Think of the default photo size as a box. Each photo in the folder will fit within that box shape, and some will fill it. Some photos might be of maximum width but less height, and vice versa.
4. All photos loaded into a folder through the Bizazz Photo Processor are automatically resized, to suit the folder’s default setting. You can override this, and set a photo to another size. (Section 7.3.2.7)
5. A folder can also have a default photo *proportions* (Aspect Ratio) setting:
  - This ensures even gaps between images in a gallery; but it restricts the choice of images which can go into the folder.
  - Contact SuttonNet if you want to use this feature.

### 6.3.3 Image is Wrong Size?

If you want to use a photo that’s already been loaded to Bizazz, but you need it in a different size:

- Don’t be tempted to adjust photo size by dragging image edges in and out using the webpage editor. This produces unnecessarily large image files, which slow down your webpage.
- Reload the same image in another size, with a different (but related) filename; or delete it altogether, and reload it in the desired size.

### 6.3.4 Image File Compression

1. Large files for images slow a website down unnecessarily. So compress every image file. A perfect image which a site visitor gives up waiting for, is less use than a good one which arrives fast.
2. Compress the file at the end of photo/image processing:
  - in the Bizazz Photo Processor (Section 7.3.2.8); or
  - with your own software (Section 8.2.2.3).
3. Compression is a balancing exercise, where you seek to minimise file size without visible loss of quality. Some compression is nearly always possible without any discernable difference. Human visual perception isn’t as acute as the capacity of our cameras.

4. The less the compression (toward 100 on the Bizazz scale), the slower the image on your website will come into view, especially on tablets and phones.
5. 70% compression is good for many photos. The best setting depends on the nature of the photo.
6. Compress enlarged images as well as thumbnails; these are particularly large files and slow to load.

## 6.4 The Best Image

### 6.4.1 What Does Your Online Customer Want to See?

Many site visitors won't spend time reading if your photos aren't a drawcard.

1. Customers need to see:
  - clear, good quality, attractive images with a suitable background (contrasting colour, not distracting).
  - the visual selling points of your products: workmanship detail, fine materials, colour range...
2. Photos are your opportunity to catch the customer's eye and differentiate your wares from all the others. This is especially true for craftsman-made products.
3. If your products are best shown in use/on location, make sure they stand out from the background.
4. Buildings (motels &c) often look best in early morning or evening, with all lights on. Don't hide a welcoming streetfront under verandah shadow.
5. Photos of business owners and/or staff show the human side of your business, and reassure site visitors that you are no bogus enterprise.

### 6.4.2 Getting the Best from Your Own Photos

1. Many *mobile phones* take a high enough quality photo for website use, if your hand is steady enough to prevent blurring.
2. Use a *tripod* to ensure absolute stillness for critical photos, eg products.
3. *Product photos* are often taken against a white background (a sheet, paper or wall), in lighting which produces minimal shadows.
  - Products which are light coloured may look better against a (uniform) coloured background; but the background colour should not draw the eye away from the product.

4. To *crop closely around the subject* of an image, instead of retaining a rectangular photo shape:
  - If your webpage has a white background, use a white background in the photo. Any cropping imperfections will meld unnoticed into the page.
  - It is easier to crop around an odd shape, if the photo background contrasts strongly with the object's colour.
5. Utilise the best *light* for your subject. People should not be squinting into the sun, or have shadows under their eyes or hats.
6. If photographing *children*, ie any humans under 18 years: get parents'/guardians' permission (preferably in writing) if they aren't your own kids.
7. For *animals*, you may need to take lots of photos and select the best, especially for action shots:
  - Getting on a level with your subject can help.
  - Headfirst shots of animals make the head look out of proportion.
  - Reject photos where animal(s) look off balance or have their legs splayed in all directions, unless you want a comical effect.
8. Watch out for odd effects which you didn't notice at the time:
  - Has your cow sprouted an extra leg or two?
  - Is your competitor's signage visible?
  - Is the ocean view marred by powerlines?

Sometimes these can be removed by photo processing.

### 6.4.3 Photos & Images from the Web

1. Photos and images for webpages can be sourced from the web, either free or at a cost.
2. These can look artificial: eg those photos of grinning office staff in white offices, who look remarkably similar on 100's of businesses' websites.
3. If you use other photographers' work, it is up to you to ensure that you do not infringe any copyright.
  - There may be restrictions on using images for commercial purposes.
4. There are scams as well as possibly legitimate attempts at 'debt collection' for unauthorised use of images on websites.
5. If you receive a letter or email alleging infringement on your website of photo copyright:

- a) Examine the complainant's photo very closely, especially if it is a common subject. Check shadows, tree height, cloud shapes, building detail: is it the same day?
- b) There is help online to ascertain which image was published first on the web. Contact SuttonNet.

### 6.4.4 Professional Photography

This option may be well worth the cost, especially if:

- you are in a highly competitive market
- your products have potential to offer spectacular shots
- your products are difficult to photograph in an appealing way, or
- you will never get around to updating crucial photos.

We have seen a photographer talented in photographing machinery, speedboats and cars produce truly outstanding images, which lift websites out of the ordinary.

A professional knows how to make your photo subjects draw attention, using the right location or lighting.

## 6.5 Photo/Image Processors

### 6.5.1 Software

1. You may already have photo processing software installed on your computer.
2. There is a range of proprietary software and freeware available, depending on your operating system: eg Photoshop, Irfanview, GIMP. Each system has many tools. It takes time to learn how to use them well.
3. Unless you have experimented a lot with photo quality, the processing tools you have used for saving your home pics will probably not produce good enough images for your website.
4. SuttonNet has developed its own software, a simplified photo processing system designed for business websites:
  - This processor comes with your website's Bizazz system.
  - The quality produced is excellent for websites, comparable to that of more complex photo processors.
  - It is very easy to use.
  - There are some tasks that the Bizazz processor does not do.
5. If you are not confident with using a photo processor or lack the time, SuttonNet can process images for you.

## 6.5.2 Purpose

1. Process photos/images in order to:
  - a) reduce the download time and memory required to keep your website performing well – particularly when it is viewed on small devices, which usually take longer to download images
  - b) crop them to desired content and proportions
  - c) ensure consistently sized photos, eg for a gallery or products display
  - d) enhance image quality and clarity
  - e) create small (thumbnail) plus larger versions of the same image
  - f) create special effects.
2. Photos and drawings contain a good deal of ‘information’ in digital terms (bytes). They slow down the website and can overwhelm low quality phones or tablets.
3. There is scope for reducing the amount of memory and computer power needed for an image, without any visible loss of quality.
4. Good photo processing utilises this gap, to balance website performance and image appearance. It takes into consideration where each image will be used on the website and for what purpose.
5. Processing can make the most of a less-than-perfect photo, within limits.

## 6.5.3 Processing Do’s & Don’ts

1. *Do not compress or re-size photos twice.* The image quality will suffer:
  - a) If you adjust your photo using Photoshop or similar software, don’t compress it before loading it via the Bizazz photo processor.
  - b) Don’t re-size photos before using the Bizazz photo processor (or before sending them to SuttonNet for us to load).
2. *Photos that are already stored in Bizazz cannot be cropped, enlarged or enhanced:*
  - a) If a photo stored in the website backend is too big/small for your webpage or needs different cropping etc:
    - i. process the original photo again as you want it and then upload that version.
    - ii. Either delete the first image or name the second one carefully, so that the photos can’t be confused by someone editing the website.

- b) Do not attempt shortcuts like clicking on a corner and dragging with the mouse to adjust photo size when editing a webpage. The webpage would still have a large file to download, which would slow the whole website down.
3. *Adjust image size and quality before adding photos to webpages:*
- a) This yields a smaller file to download, therefore faster website response time (especially on phones).
  - b) A photo processor does a better job of resizing photos than a browser.
4. *Tif files cannot be compressed.* Mostly you will use images in png or jpg format.

# 7 Bizazz Photo Processor

## 7.1 Overview

SuttonNet provides simple photo processing and upload software within Bizazz:

- This is a fast, effective system which doesn't require specialist knowledge.
- It automatically resizes photos and other images to fit into standard sizes, eg for a rotating gallery or ecommerce products.
  - Loading images in a standard size, eg products on e-shop pages, can be a nightmare for large websites.
- It produces thumbnail + enlarged versions quickly and easily.
- It is the best method for large numbers of images.
- It is designed for loading images with minimal processing requirements, not for complex adjustments such overlay, colour balance and contrast. Don't expect the facilities of Photoshop.
- Resulting photos are high quality and suitable for website use.

The Bizazz Fast Photo Processor is geared for copying images from your computer into your website backend:

- in batches
- in the correct size
- with useful filenames
- in the correct folders, for easy placement onto webpages.

## 7.2 Set Up & Start

### 7.2.1 Program Info

The Bizazz photo processor is a Java program which runs on your own computer. It connects to the backend of your website on its SuttonNet web server, but not via your Bizazz system.

While you are using the processor, you won't see a Bizazz menu on the processor interface. To return to Bizazz, either:

1. search for the browser icon at bottom of screen and click on it, then select the open Bizazz tab; or
2. click on X at top right corner, to close the processor. You will return automatically to the page of Bizazz which links to the photo processor.

## 7.2.2 Java Installation

1. The photo processor requires Oracle's Java.
2. If Java is not already installed on your computer:
  - contact SuttonNet, or
  - you can install it yourself, from: <http://java.com>. Do not install alleged Java software from any other website; it could contain viruses.
3. After you have downloaded Java, run it. You can now use the Photo Processor whenever you are updating your website.
4. Sometimes when you start the processor, you will get prompted to update your version of Java. Keep the software up to date; this is a security measure.

## 7.2.3 Start Photo Processor

### 7.2.3.1 Browser Security Permissions (First Use Only)

1. In the Bizazz main menu, go to:
  - 'Website – Photo Processor' for general webpage images
  - 'Products – Photo Processor' for gallery or product (e-shop page) images.
2. The first time you do this, you may be asked to activate Java, via a series of questions.
  - The Photo Processor runs as a Java applet on Java software.
  - Because Java is powerful software, this triggers a warning in the browser, in case the applet is not being run intentionally.
3. The wording of each query will depend on your browser and its version. Follow the prompts to agree; click on 'Allow to activate Java', 'Allow and remember', 'Understand and accept the risks', 'Advance', 'Add Exception' or similar.
4. Next, accept the Bizazz photo processor program specifically:
  - This program does have a security clearance certificate. However, some operating system versions don't immediately recognise this.

- The browser will ask you whether you will give the Photo Processor ‘permission to run’: ie whether you trust its security certificate. Tick to agree.
5. Tick ‘Do not show this again for apps from this publisher [SuttonNet] and location [your website]’. Otherwise, you will have to repeat this security check every time you use the Photo Processor.

## 7.3 Load & Process Images

### 7.3.1 The Processor Interface

1. Click on either ‘Website – Photo Processor’ or ‘Products – Photo Processor’ in the Bizazz main menu. To choose the right one, see Section 6.1.4.
2. The interface is under reconstruction. For now:
  - folders can be selected *either* on this page or on the New Version interface; but
  - new folders can *only* be created on this page. (Section 7.3.1.2)
3. When you have created/found the folder you want, click on ‘Try new version’ at right of the top grey section.
4. The interface has 3 columns. Work through from left to right (see sections below for details):
  - a) Select (or change) Target Folder
  - b) Elect to load photos as small-only or as small+large paired images
    - if you want some photos to have an enlarged version, choose ‘small+large’
  - c) Select the photos you want from your computer’s files and start processing them.

#### 7.3.1.1 Select from Current Folders

1. The left column shows folders and subfolders in Bizazz. Click on +/- to show/hide subfolders.
2. Default photo size for the currently selected folder is:
  - in the 2nd column, and also
  - shows whenever the mouse hovers over the folder name.

3. Click on the folder/subfolder you want. If you need several folders for different photos that you are loading, you will:
  - process the images in batches, one batch for each folder, and
  - change the folder selection here, after you finish each batch.
4. ‘/’ is used for photos which do not need a particular folder. This is practical for websites which have few photos outside clearly defined categories.
5. If none of the folder options is right, see Section 7.3.1.2.

### 7.3.1.2 Create New Folder or Subfolder

1. Go to the top grey area of the Photo Processor page.
  - If you are on the New Version interface, find the browser icon at bottom of your screen and click on it, then locate the tab for Bizazz. It will show this page.
2. Click on the folder icon with the red star. The ‘Create New Folder’ box appears.
3. In the dropdown box:
  - Select ‘/’ to create a top level folder, or
  - Select a folder name, to create a subfolder inside it.
4. Give the new folder a meaningful name. Consistent format helps SuttonNet when we are troubleshooting, or working on your website: eg programming:
  - Use - (hyphen) between words and all lower case
  - Do not use spaces or punctuation; letters and numbers only.
5. Click on ‘Create Folder’.
6. If you used the wrong topfolder:
  - Re-create your subfolder under the correct folder
  - Contact SuttonNet to delete the unwanted subfolder, so that photos don’t get put in the wrong place.
7. Either:
  - *return* to the New Version interface, via the icon at bottom of your screen, or
  - *open* the New Version interface, by clicking on ‘Try New Version’ at bottom right of grey area.

### 7.3.1.3 Default Photo Size Settings

1. The Photo Processor displays the default setting for photo sizes (both small and enlarged versions) for each folder. These are preset for your website. (Section 6.3.2)
2. All photos loaded through the Bizazz Photo Processor will be:
  - a) sent to the folder that you specify, and
  - b) automatically resized to the folder's default setting.

This helps to create a consistent look.

3. If there is any image which you want larger (or smaller), override the default setting to another size while you are processing it. (Section 7.3.2.7). See Section 6.3 on suitable sizes for webpage images.

### 7.3.1.4 Small/Large Options

In the 2nd column, select whether you want to load photos as:

- small photos only, or
- small + enlarged pairs.

If you only want some of your photos to have a large version: choose 'small+large'.

### 7.3.1.5 Select Images to Load

1. In the 3rd column, click on 'Open Picture'.
2. Using the dialog box, browse through the photos on your computer.
3. Select as many as you want to load *in this batch*. All the photos will go into the selected folder. (Section 7.3.1.1)

Eg: for a subfolder 'products/caterpillarwear', select only photos of caterpillar socks and ties, rather than a mix of caterpillarwear and moth millinery.
4. Click on the filename of *one* image that you want.
5. Hold down the Control key and select all the other images you want; then release the Control key.
6. Click 'Open' or similar, depending on your software. All images are now selected and ready to be processed.
7. Load other photos *after* fully processing this batch. You will then reset the target folder (in the example above, reset to 'products/mothhats').

## 7.3.2 Processing

### 7.3.2.1 Overview

After selecting images to load, the first photo is already displayed ready for cropping, under the heading, 'Processing [image filename] into a SMALL image'.

Each photo is individually:

- cropped
- resized
- sharpened
- renamed
- if a product/gallery photo, catalogued with further information for the database
- processed again as a larger version.

The Photo Processor moves you through this step by step, via options at bottom of the screen.

### 7.3.2.2 Cancel

*Cancel* deletes this photo from the batch to be processed.

If you are processing small + large pairs:

- If you cancel the smaller photo, the Photo Processor will offer to process its large version next.
- After you process the small version of any photo, you can cancel its larger version if you don't need it. The Photo Processor will go to the next photo.

### 7.3.2.3 Crop

When an image is displayed, ready for cropping:

1. Select *No Crop* if you don't want to crop this photo.
2. To crop:
  - a) Hold down the left mouse button and drag inside the image, to draw a box.
  - b) When you are happy with the new outline, release the button.
  - c) If you change your mind, just draw another rectangle; it will override the earlier one.
  - d) When the rectangle looks right, click on 'Crop'.

To crop a photo to set proportions, see Section 7.3.2.4.

#### 7.3.2.4 Aspect Ratio

To crop the image to specific width-to-height proportions (eg 2:1):

1. Tick *Aspect Ratio*.
2. Type the required numbers into 'Width' and 'Height'.
3. Follow the instructions for cropping.
4. To alter the cropping rectangle:
  - Redraw the same proportioned rectangle in a different position, or
  - Alter width or height to alter the ratio and redraw, or
  - Untick 'Aspect Ratio' and redraw.
5. Click on 'Crop'.

Important notes:

1. Aspect Ratio remains ticked, and at the setting you specified, throughout the processing session (ie until you close the Processor page).
  - To prevent this: untick Aspect Ratio or alter the numbers, when processing the next photo.
2. If you use Aspect Ratio where the selected folder has a default Aspect Ratio setting (see last point in Section 6.3.2): that setting will remain overridden for the rest of this session.
  - To prevent this: untick it or reset the numbers to the default, when processing the next photo.

#### 7.3.2.5 Rotate & Auto

On the next screen, the options are:

1. *Rotate 90 degrees*
2. *Auto Colour Balance*: 'stretches' the colours used in the photo across the colour spectrum
3. *Auto Equalise*: enhances a dim background.

Colour Balance and Auto Equalise settings are not needed for most good quality images.

- Try either of them to improve a low quality photo: eg one taken with a poor camera or on a dull day.
- Use (2) *or* (3), not both at once.
- Untick if you don't like the results.

### 7.3.2.6 Sharpen

Use sharpening with extreme care:

- A good photo often doesn't need sharpening.
- Oversharpening produces a grainy image.

Sharpen only if needed, with the slide adjustment. One or two notches on the scale are nearly always enough.

See Section 7.3.2.7 if you want to adjust the finished photo size.

Otherwise, click on 'Continue'; or on 'Back', to readjust earlier settings.

### 7.3.2.7 Reset Photo Size

The Sharpen page also displays the photo's current (default) width and height settings, in pixels.

You can alter the photo size here if you want. When you alter either width or height, the other dimension will be scaled to fit.

For suitable photo sizes for webpages, see Section 6.3.

You cannot adjust a photo's size *after* it is loaded to Bizazz. This is your last chance.

Click on 'Continue'; or on 'Back', to readjust earlier settings.

### 7.3.2.8 Compress File

See Section 6.3.4.

Note: The compress page is skipped for .png files.

1. Use the slide to compress the size of the photo file.
2. Often you won't need to change the default setting of 70.
3. If your screen is low quality or your vision is less than A1, click on 'Exaggerate' in the bottom left corner:
  - This displays the photo at double size, so that you can easily see the results of changing compression.
  - Don't worry if the image looks a bit blurry: this won't happen at normal size.
  - When you are happy with the compression value, click on 'Normal' to check how the photo looks at real size.
4. Click on 'Continue' (or 'Back').

### 7.3.2.9 Name Image File

1. The last screen shows the photo's current filename, copied from your computer file.
2. You can change the filename here to a more suitable name, considering:
  - a) its role on the website
  - b) any similar images, and
  - c) the folder name.
3. If you type a space into the filename, the Photo Processor will automatically replace it with an underscore: \_
4. See Section 6.2.1 on naming images.
5. '.jpg' is the filetype suffix. It cannot be changed.
6. See Section 7.3.3 next, for product/gallery/classification photos. They need more details completed.
7. Otherwise, load the image (or click on 'Back', if you want to make changes).

### 7.3.2.10 Load

Click on 'Transfer to Bizazz' .

Wait for the message: 'Transfer Successful'.

Either:

1. Click on 'Continue', to keep loading your chosen photos to the same subfolder (Section 7.3.2.11), or
2. Load photos to another folder (Section 7.3.2.12), or
3. Leave the Photo Processor page.

### 7.3.2.11 Continue (Same Subfolder)

After successfully transferring an image to Bizazz, click on 'Continue':

1. If you are processing only small photos, or if you have just finished a large photo, the Photo Processor displays the next photo in the batch, ready to crop for its 'small' version.
2. If you are processing small + large pairs, and have just finished a small version, the Photo Processor now takes you through processing the enlarged version of the same image:

- a) The top bar displays the message, 'Processing [imagefilename] into a LARGE image'.
- b) Usually you can move quickly through the steps, making this image similar to the smaller one:
  - The crop page will automatically offer same crop outline as you used for the smaller image.
  - Size offered will be the default 'enlarged' size.
  - Compression scale will be at default setting of 70%.
  - Other options will be offered at the same values as you chose for the small photo.
- c) You can change any settings you wish.
- d) Filename will be automatically generated as the smaller image's (new) name plus '-large'.

Do not alter this; it is how Bizazz recognises the 2 photo files as connected.

When you have finished processing all the selected photos, you will be taken back to the New Version interface.

You can choose a new folder to load more photos, or close the processor. You will then be taken back to the Photo Processor link page of Bizazz.

#### 7.3.2.12 Change (Sub)folder

Start from Section 7.3.1.1 and go through the whole process again, using another (sub)folder.

### 7.3.3 Product/Gallery Photo Processor

#### 7.3.3.1 Section Overview

When you use the Products Photo Processor, the last page of the loading process is different. Your website needs extra information for product and gallery photos.

This section takes you through the extra fields.

#### 7.3.3.2 Catalogue Name

This is the name given to a linked pair of photos (small + enlarged) filed in the Products/Gallery area. Think of *Catalogue* as a tiny subfolder for these linked photos. It's needed by the database.

Catalogue name is often just the same as the photos' shared filename, but with spaces between words and no filetype (.jpg).

### 7.3.3.3 Title & Alt Text

Complete both fields.

1. *Alt/ernative text/* is read out aloud when a visually impaired person visits your webpage.
2. *Title* appears when a site visitor hovers their mouse over the image.
3. Both alt and title attract search engines' attention (particularly alt text). Include appropriate keywords in them, to help search engine rankings.
4. Alt should be a comprehensible phrase or sentence, not just a string of (key)words. Often it needs more information than Title, about this image that a visually impaired site visitor can't see clearly/at all.

Title and Alt text for a product/gallery photo:

- are created while the image is being loaded to Bizazz
- are stored in the database with the image file
- can be edited later, in the Products – External Files area.

Alt text and Title are handled differently for general webpage images:

- They are created and edited in the cms editor (Section 9.1.3).
- They can vary on different webpages, if the same photo is repeated.

### 7.3.3.4 Description

1. You only complete this field once, when loading the first image of a small + large pair.
2. *Description* is usually displayed on the website when the 'large image' version of a gallery photo or product photo appears.
3. It allows more information than a title or caption comfortably permits, eg:
  - List names of all people in a large group photo.
  - Tell the story behind a big catch.
  - Include historical notes about a location, for those who are interested enough to look at the large version of the photo.
4. Description is displayed according to customised specifications for your website (eg above large image/below large image).
5. It is linked with the Catalogue name in the database.
6. Description can be changed later, in the Products – External Files area. (Section 11.3.5.4, ??)



# 8 Load Images Without Bizazz Processor

## 8.1 Introduction

See Section 6.1.4 to select the right method for loading your images.

When not using the Bizazz inbuilt processor, images are processed and uploaded to the website one by one.

The exact procedure depends on:

1. your operating system
2. your browser
3. your photo software.

Be careful to file images in the right folders in Bizazz. (Section 6.2)

## 8.2 Prepare Images

### 8.2.1 Overview

1. This section covers images processed and loaded *without* using the fast Bizazz Photo Processor. See Section 6.1.4 for the best method for your images.
2. You will need to use your own photo processing software. See Section 6.5 for information on photo processors.
3. See Section 6.2 for important filenaming and folder information.
4. See Section 6.4 for pointers on high quality images for websites.
5. Follow the steps below, in order.

### 8.2.2 Adjust Images

#### 8.2.2.1 Overview

Only work from original images; don't process an image twice, as it reduces image quality.

Select and process each image, one at a time. As required:

1. rotate, adjust brightness etc
2. crop to eliminate unwanted material and focus on your subject
3. resize the photo to a suitable size to fit your webpage (Section 6.3)
4. sharpen last, if needed (Don't oversharpen an image, or it will look grainy on a web browser)
5. compress, save and name the processed image file.

#### 8.2.2.2 Re-size to Scale

1. Using 'Image-Scale' or equivalent function in your photo processor, set *one* of the dimensions (height/width).
2. Tab. The other dimension image is now altered to scale.
3. Scale the image using Sinc (Lanczos3) interpolation for photos, Cubic for drawings.

#### 8.2.2.3 Compress, Save & Name

1. Save the resized and adjusted image into the folder on your computer which is specifically for your *processed* website images.
2. Compress the file while saving it:
  - 70% quality is usually a good compromise between manageable image download size and quality.
  - If some ghosting appears in the saved image, try up to 80%.
3. Use a suitable format:
  - .jpg (lower case) suffix for photos
  - .png or .gif for cartoons, diagrams and line drawings including sketch maps.
4. Create a filename the same as, or comparable to, the original image's filename:
  - This keeps track of which original photos have already been processed, so as not to waste time duplicating your work.
  - You can easily trace the source image of any photo on your website, if you need to process it differently later (eg larger size, different colour effects).
  - You can identify which image is the original and which has been processed, from their folder locations.

### 8.2.2.4 Small & Enlarged Versions

For thumbnail + enlarged photo pairs:

1. Process the original to produce a small version.
2. Process the original image again. This time, re-size it as a larger version. For suitable sizing of enlarged images: see Section 6.3.
3. When you save the large version:
  - Use the same file name as you have for the smaller adjusted image; and
  - Add '-large', ie hyphen followed by large. Bizazz will recognise the -large file as an enlarged version of the other image.

Eg:

Glutenfree/Cakes/Traditional-Wedding-Cake-2-tier.jpg

Glutenfree/Cakes/Traditional-Wedding-Cake-2-tier-large.jpg (a site visitor will click on the thumbnail cake image to see this larger version of the photo)

## 8.3 Load via External Files

This method is used when you need to connect images to a specific contact or product stored in your website database.

Go to Products – External Files or Contacts – External Files, depending on where the file is to be kept in Bizazz.

Click on 'Add External File'.

Follow the instructions in ?? or Section 12.3.4.

## 8.4 Load via CMS Editor

### 8.4.1 Getting Started

1. Use this method to upload photos/images which are *only* for use on general webpages (not for ecommerce products). They need to be already processed, compressed and re-sized.
2. To start, either:
  - a) start editing a webpage (Section 4.3), or
  - b) click on 'Add new webpage', on the Select Website Articles page (Section 4.6). You will use this draft page to access the image upload button, then click on 'Abandon Draft' after you have finished loading photos.

3. If you plan to insert a newly loaded image into this draft webpage immediately: click at the *beginning* of the text line where the *top* of the image will sit. If you are just loading the images, not inserting any yet: click anywhere inside the cms editor frame.
4. Click on the 'Insert Image' icon in the top icon row (looks like a screen).
5. Using the dialogue box:
  - Always start by setting the correct *folder* to store the image file in. (Section 8.4.2)
  - Upload a copy of each photo, one at a time, from your computer into Bizazz.

## 8.4.2 Select Folder

### 8.4.2.1 Folder Directory

1. The Directory dropdown box shows all the folders and areas of the Bizazz database which can contain image files.

Eg:

- products
  - photo galleries
  - rotating galleries
  - folder of large feature photos used for a prominent position on homepage or another webpage
  - contacts classifications which can include photos, eg staff members.
2. Default directory '/' displays all folder options.
  3. For each image, *select the right directory folder (topfolder) before you start loading it:*
    - It's possible to do so later, but it's easy to forget.
    - If the image file is kept in the wrong area, it will be hard to find and publish.
  4. Select the area/folder where this image belongs.

If the image will be used more than once on the website:

1. Choose the right folder to ensure that *automatic* display functions work.

Eg select:

- /products, if will be used on an ecommerce page

- /contacts, if it will be used for an *automated* display of contact name + image (staff, website contributors etc)
  - the correct gallery and album (folder and subfolder), for a photo gallery item.
2. When you want to display it on other pages, you can find the image in the /products, /contacts or /gallery folder; or
  3. Alternatively, you can load an image twice to Bizazz, into different folders. The folder name distinguishes the matching image files. This allows you to load the same photo in different sizes or with different cropping.

To manage a group of related photos: create a new folder or subfolder, if there is no suitable one. (Section 8.4.2.2)

#### 8.4.2.2 Create (Sub)folder

Copy folder names from your own computer's folders of images intended for the website:

- You can keep track of what you have already uploaded and what you haven't.
- It is easy to keep website images in the right folders.

For best results, keep folder names relevant and unambiguous, especially for others who use Bizazz to update your website.

1. Click on the folder icon with the red star. The 'Create New Folder' box appears.
  - a) In the dropdown box:
    - Select '/' to create a top level folder, or
    - Select a folder name, to create a subfolder inside it.
  - b) Give the new folder a meaningful name. Consistent format helps SuttonNet when we are troubleshooting, or working on your website: eg programming:
    - Use - (hyphen) between words and all lower case
    - Do not use spaces or punctuation; letters and numbers only.
  - c) Click on 'Create Folder'.
  - d) If you use the wrong topfolder:
    - Re-create your subfolder under the correct folder.
    - Contact SuttonNet to delete the unwanted subfolder, so that photos don't get put in the wrong place.

### 8.4.3 Select Image

In the 'Insert Image' dialog box:

1. Click on 'Browse,' to see the names of files on your computer.
2. Locate the *processed* images which are ready for the website (not the original images).
3. Select the photo file that you want. Click on 'Open' or double click, depending on your software.
4. Bizazz returns to the Insert Image dialogue.
5. If you haven't already done so, select/create the right destination folder now. (see Section 8.4.2.1)
6. Click on 'Upload'.
7. Wait until you see a message that the file has successfully been uploaded.
8. Click 'OK'.
9. If you positioned the cursor ready to insert this photo straightaway into a webpage (Section 8.4.1): go to the third dot point in Chapter 9.
10. Otherwise, continue uploading as many images as you want.
11. If you have enlarged versions of some photos: upload both the small image and large image files to the *same folder*.

# 9 Insert Image into Webpage

## 9.1 Insert Image Dialog

### 9.1.1 Overview

If the image file is not yet loaded to Bizazz:

- Save any webpage draft you are working on, and load it via the Photo Processor (Chapter 7); or see Section 8.4.1.

Once the image file is already stored in the website backend:

1. Start in the cms webpage editor frame. Click at the start of the line (row) which will be level with the *top* of the image when it appears on the page. (Section 9.1.2)
2. Click on the 'Insert Image' icon 2/3 way across the icons row (looks like a screen).
3. Select the directory which you think the image is stored in, from the dropdown list.
4. Select 'thumbnail' to view a gallery of available images *or* select 'list' to view all image filenames.
5. If you can't find the image you want:
  - Click on one of the folders inside this directory, and search through the images inside it, or
  - Broaden your search by using the manila folder icon with green arrow to move up one level.  
Eg from 'Products' to '/'.
6. Select an image, by clicking on the thumbnail/on its filename in the list.
7. Complete Alt text and Title. (Section 9.1.3)
8. Click on 'Insert'. Don't stop yet, even if the page looks as you want it to; you need to align the photo, so that it stays where you want it on all size screens.
9. Go to Section 9.2 and Section 9.1.6 to finish.

10. Sometimes after inserting an image, it is slow to appear or its top does not look level with the row:
  - In the underlying code, it is level.
  - After you finish positioning the image (Section 9.2), its vertical alignment will look fine.

### 9.1.2 Starting Point

Don't take the risk of shonky layout on some browsers/devices:

1. Always click at the *start* of a paragraph to add a photo, even if it will finally be placed in the middle of the page or at the far right.
2. You can insert an image at the start of an empty paragraph; ie there need not be anything else in the 'paragraph' except the image. To create a new paragraph, press 'Enter' once.
3. If you try to insert a photo partway along a line or partway down a paragraph, it can produce strange arrangements of text and image on a phone, or when using a different browser, or when you add more text.
  - For an image partway down a paragraph, only right alignment is feasible.
  - to avoid layout problems, break up the text into more paragraphs and insert image as in (1). It's better to avoid long paragraphs anyway; they are hard to read on phones.

### 9.1.3 Alt & Title

1. *Alt[ernative text]* is read out aloud when a visually impaired person visits your webpage.
2. *Title* appears when a site visitor hovers their mouse over the image.
3. Both alt and title attract search engines' attention. Include appropriate keywords in them, to help the website's search engine rankings.
4. Alt should be a comprehensible phrase or sentence for a person to hear, not just a string of (key)words.
5. Title and Alt text can be edited at any time for a general webpage photo and can differ on different webpages using the same photo. For a product or gallery photo, a preset title and Alt text are stored in the database. These can be edited (Section 7.3.3.3)
6. The best choice of Title and Alt text wording depends on your purpose for putting that photo onto that particular webpage, and in that particular position.

7. You can re-use the same image on a second webpage, with different Title and Alt text.

### 9.1.4 Image Width & Height

Image width and height are shown in the dialogue box *only* to help you to distinguish between differently sized versions of the same image.

If you have selected the wrong version from the thumbnails, do not attempt to alter image size; it can slow the webpage down. Delete the image from the webpage and re-insert the correct sized image.

### 9.1.5 Refresh

This button re-creates the list of image files in Bizazz, when you have just loaded new images.

### 9.1.6 Small & Large Versions

To insert small + large versions of the same image (thumbnail + enlarged):

1. Insert the smaller version.
2. Inside the cms editor frame, click on this image.
3. In the right hand styling column, click on 'Image has Large Version'.

The smaller image will be displayed on the published webpage. The enlarged version will be shown whenever a site visitor clicks on the smaller photo.

## 9.2 Position Image

### 9.2.1 Overview

1. Set alignment for *all* images, even if they look like right when you insert them. Exceptions:
  - E-shop product photos and gallery images: these have their position and styling preset.
  - Your website may have customised auto styling for some other image types: eg 'staff photo + text' panels. Ask SuttonNet if you are not sure.
2. An image gets inserted into the row that the cursor is sitting in. The top of the image lies on that text line (Section 9.1.2):

- Don't worry if it doesn't *look* exactly like that in the editor frame, before aligning. When you define the image as left/right/centre aligned, it settles into its correct position.
3. Positioning options can greatly affect how a webpage looks:
    - if a paragraph is later expanded;
    - if new paragraphs are added; or
    - when a responsively designed website adjusts to different sized screens.

Always check phone and tablet views, to make sure that:

- the look you have created is what you want;
  - the text and photos make good sense on all screens; and
  - critical information is not pushed down low on the page, where it might not be seen.
4. Image alignment is preset to centre photos automatically on mobile phone view.
  5. If this is your first attempt, or if you are trying a complicated layout:
    - save your draft webpage before you start;
    - maybe test the procedure out on a dummy 'test' webpage.

### 9.2.2 Getting Started

1. Work in the cms editor frame.
2. Use 'figure' styling tools (right hand column) for a photo with caption (Section 9.3.5) and 'image' styling for a photo without a caption.
3. First align the image left/right/centre. Then consider clearing floats (Section 9.3.3) and other options.
4. As always with right hand styling tools in the cms editor: always *turn off* the current alignment before applying an new conflicting one.
5. If later editing adds or deletes text near a photo, you can change image alignment &/or floats.
6. Decide on your preferred layout from the diagrams below, and follow the instructions.
7. Check how the published page looks, on different sized screens.
8. If it all goes pear-shaped:
  - a) Check the html code (Section 4.4.4.13), if you have access to it:

- Clean up any extraneous code, which can collect after repeated attempts to get something right. The problem might go away once the old code has been cleared; or
- b) Call SuttonNet for help.

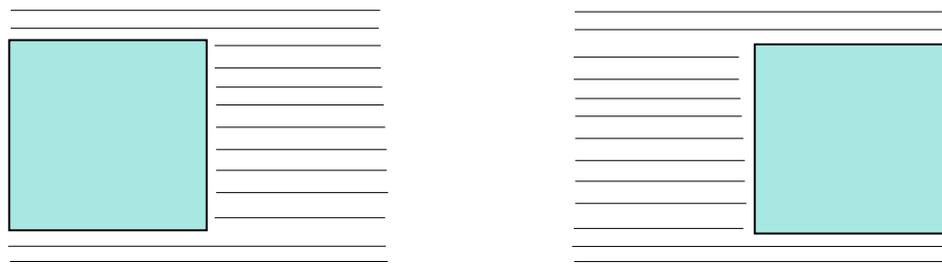
## 9.2.3 Align Image Left/Right

### 9.2.3.1 Overview

1. Left/right/centre alignment of images is a similar concept to left/right/centre justified for text. However, the code may be different.
2. Align an image straight after inserting it in a webpage.
3. To *edit* an image's alignment using the right hand styling tools: always turn off the old alignment before trying a new one.

### 9.2.3.2 Case 1: Image Beside Text

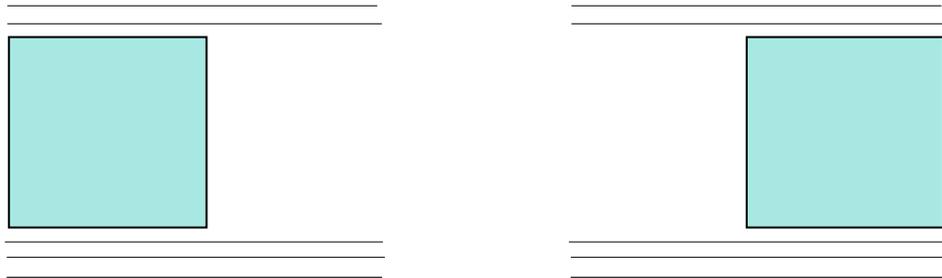
1. Click on the newly inserted image.
2. Use the styling tools 'Image Left Aligned'/'Image Right Aligned'. (Section 9.3.1.2)
  - Do not leave the image without any alignment specification; it will cause problems on the published webpage.
  - It might look as if left alignment doesn't do anything, but it is the underlying code that counts when it is viewed in web browsers.



3. All text will:
  - fit in to the space beside the image
  - continue across the full width of the page below it.
4. See Section 9.3.3.

### 9.2.3.3 Case 2: Image Alone

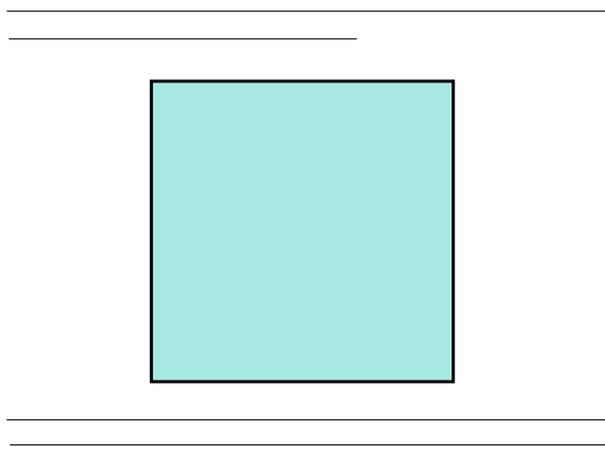
1. In this case:
  - You pressed Enter before 'Insert Image'. This inserted an image in a blank line (new paragraph).
  - You want to ensure that the image never has any text alongside it.
2. Click to the right of, and next to, the newly inserted image. Press Enter.



3. In this scenario, the image is a single *paragraph* in the webpage code. Align it as a paragraph, as follows:
  - a) *Image aligned left:*
    - Left justified is the default setting for paragraphs, whether they consist of text or of images. You don't need to do anything.
  - b) *Image aligned right:*
    - Use the paragraph justification icons along the top of the editor frame, instead of the right hand styling tools.
    - Click next to the image again.
    - Select 'Paragraph right justified'.

## 9.2.4 Image Centre

### 9.2.4.1 Overview



1. Several methods are given below. Each method produces its own ordering of text and images on smaller screens.
2. When creating *all new content on a blank area of the page*:
  - Use (i) in Section 9.2.4.2.
3. To add a new centre-aligned image to *existing text*:
  - There is other code to combine with (some of which you can't see). Things can go awry.
  - Method 1 part (ii) usually works. (Section 9.2.4.2)
  - Method 2 is a workaround when the straightforward method can't work, due to special formatting on the webpage. (Section 9.2.4.3)
4. Section 9.2.5 shows another way to centre an image, via column layout.

#### 9.2.4.2 Method 1

This is the usual method.

(i) *Simplest Scenario: No Text Below the Image Yet*

1. Type in some text.
2. Press Enter to start a new paragraph.
3. Insert the image (Chapter 9). The paragraph consists of a single image.
4. Click outside the image to its right.
5. The cursor appears next to the image, halfway down it.
6. Do not use the right hand styling tools. Because you are dealing with a paragraph, select the 'Paragraph centre justified' icon in the top row of editing icons.

7. To continue adding text or photos: click to right of the image again. Press:
  - Enter, to type in more text below the image in a *new* paragraph. You might need to reset the paragraph alignment to left justified; or
  - Shift + Enter, to add text more closely under the image and still centre-justified:
    - This text is in the same paragraph as the image.
    - You can also use this technique as an alternative for a photo caption. (Section 9.3.2.3).
  - For those who just have to experiment: you *can* type to the right of the centred image (by positioning the cursor there and just starting to type, not pressing Enter or Shift + Enter). But don't do it; it produces strange effects in various browsers.

(ii) *Place a Centred Image inside Existing Content*

To add a centred image *between existing paragraphs*:

1. Click at the end of the paragraph just above where the image will go.
2. Press Enter to start a new paragraph.
3. Follow the instructions in (i) above.

### 9.2.4.3 Method 2

In a few complex circumstances, the 'Paragraph centre justify' method does not apply. If the first method does not centre the image correctly:

1. Click on the Undo icon.
2. Click on the image.
3. Use the righthand styling tool 'Image Centre Aligned'.

This image placement tool is *only* used when paragraph centring does not work. Text fits above and below the image, but not beside it.

## 9.2.5 Using Columns

Columns can be used to arrange text alongside images. Resulting layout on small screens differs from the paragraph/image alignment methods. See (Section 5.1.2).

Columns are displayed below one another, leftmost first, on smaller screens.

If the text area in another column extends below the image, that text remains within its own column; ie it will not wrap around the image.

This method works whether you have text, or other images, or simply blank space in the columns around the centred image.

To set up a *centred image* using columns::

1. Create an odd number of columns, with equal sized columns and offsets on each side of the central one.
2. Insert the image into the centre column.
3. Align it via the paragraph centring icon above the editor frame.
4. Insert content into the surrounding columns or leave them blank.

To arrange images at left or right of the page:

1. Create the required number of columns.
2. Insert image into a left or right column.
3. Align them using the paragraph alignment icons.

## 9.2.6 Layout for Multiple Images

### 9.2.6.1 Overview

If using photo galleries, the gallery layout is preset for your website. See Section 11.3.

If your website has multiple photos per product on its e-shop pages, their layout is also preset. See:

- ?? to re-order
- ?? to add
- ?? to delete these images.

Below are 2 ways to insert more than one image across a *general webpage* (on full screen view).

Use photos of similar or complementary sizes, or your webpage will look like a dog's breakfast.

### 9.2.6.2 Column Layout

1. Create as many columns as you need.
2. Insert one photo at the head of each column.
3. Columns re-arrange themselves on smaller screens, with rightmost columns moving down below the left ones. That means that text in columns will be in between the photos, as the reader goes down the page. To avoid having text between images:
  - a) insert only photos in the columns, and
  - b) change from column layout to full pagewidth after the images.

### 9.2.6.3 Row Layout

Insert several images along one row. They 'stack' on top of one another in phone view.

Image alignment centres automatically on phone view, so that the images are stacked neatly (not pushed to left and right edges of the phone screen).

1. Press Enter to start a new (empty) paragraph.
2. Insert an image.
3. Left align it.
4. Click outside the image, to its right.
5. Insert (one or more spaces and) the next image. Either:
  - a) Left align it.
  - b) Continue in the same way across the page;

or

- a) Right align the second image.
- b) This is the last image in the row.

or

- a) Centre align it.
- b) Insert (the same number of spaces and) a third image.
- c) Right align it. This is the last image.

6. Press Enter to start a new paragraph.

### 9.2.7 To Relocate Images/Figures

To move an image or a figure (image + caption) higher or lower on webpage:

1. In the cms editor frame, hold down the left mouse button over the image.
2. Move to the start of the desired line (until the line is level with top of photo).
3. Release.

Any alignment associated with the image via styling tools will remain with it.

A caption will move with its image. The two are connected as a 'figure'. (Section 9.3.2)

## 9.3 Other Image Styling

### 9.3.1 Image Tools

#### 9.3.1.1 Overview

1. If a photo or other image has a caption, when it is positioned on the page (or repositioned) the image + caption is called a *figure*. Use ‘Figure’ tools rather than ‘Image’ alignment tools. (Section 9.3.2)
2. Managing images on a webpage can be complex. Follow the instructions carefully. Read all relevant sections of Chapter 6.
3. Image styling tools are hidden until you start editing an image.
4. Click on the image, then select each style that you want to apply.
5. Remember to turn off a style that you no longer want, before you apply a conflicting one.
6. If (when!) you forget to undo styles:
  - Remove all styling from that image and start again.
  - If you have access to html code, check that it has all cleared correctly.

Note: image styles are not indented in the right hand column as other styling groups are, because the programming structure for images is quite different.

#### 9.3.1.2 Image Alignment

For image placement (Image Left, Image Right, Image Centred):

1. Click on the image, then select the alignment that you want.
2. Remember to turn off a style, before you apply a conflicting one.
3. If you forget to undo styles:
  - Remove all styling from that image and start again.
  - If you have access to html code, check that it has all cleared correctly.
4. See also Section 9.2 for best results:
  - There is much you need to think about with placing images, especially the consequences for smaller screens when the page content re-arranges itself.
  - In the cms editor, you only see how the webpage looks on a large screen.

If you create a caption *after* aligning your image:

1. The caption will automatically take on the same alignment as its image.
2. The image + its caption will be redefined as a figure by the webpage editor.
3. From now on, use Figure tools for realignment.

#### **9.3.1.3 Image Full Width**

This tool displays an eye-catching or important image right across the webpage.

You will need an image of suitable width.

See Section 9.3.7.

#### **9.3.1.4 Image Borders/Image Shadow**

Image border styles are customised for your website.

1. Click on the image.
2. Select an image border style or shadow.
3. Remember to turn off a style that you no longer want, before you apply a conflicting one.

See also Section 9.3.4.

#### **9.3.1.5 Image has Large Version**

1. Click on an image in the cms editor frame.
2. Click on 'Image has Large Version'.
3. This tool instantly selects the '-large' file of your image, which you have already uploaded to the website backend.
4. The large photo will be displayed when a site visitor clicks on the smaller photo.
5. See:
  - Chapter 7 (fast upload for large + small pairs of photos)
  - Section 9.1.6 (uploading and naming large + small pairs of any kind of image).

## 9.3.2 Figures

### 9.3.2.1 Introducing Figures

A *figure* is an image + its caption. They are a unit in the underlying code, so that they won't separate as the page layout adjusts to various sized screens.

Bizazz will automatically guide you to the figure styling tools for an image with a caption, or to image tools for one without a caption.

To insert the image: see Chapter 9.

To create a caption for the image: see Section 9.3.2.3.

Righthand styling tools are used to:

- position the figure on the webpage
- alter the placement of captions.

Note: caption code may encounter problems on newer browsers. Follow instructions carefully.

### 9.3.2.2 Figure Left/Right/Centre Aligned

1. Click on the image or the caption.
2. Select 'Figure Left', 'Figure Right' or 'Figure Centre Aligned'.
3. Remember to turn off a style, before you apply a conflicting one.
4. If you forget to undo styles:
  - Remove all styling from that image and start again.
  - If you have access to html code, check that it has all cleared correctly.

See also Section 9.2 for best results. You need to think about a good look on smaller screens too; in the cms editor, you only see how the webpage looks on a large screen.

Note: If you create a caption after an image was aligned using Image tools, the new caption automatically takes on the same alignment as the image.

### 9.3.2.3 Add/Edit Image Caption

There are 2 ways to create a caption:

1. Use snippets (the usual method: see below); or
2. For an image centre-aligned via 'Method 2' only (see Section 9.2.4.3):
  - a) Use Shift + Enter and type caption text close under the image.

- b) This text is centred along with the image.
- c) Text and image are in the same paragraph. They remain together as the webpage re-arranges itself on different sized screens.
- d) Font size for the caption is the same as for other webpage text, which can be confusing.

Using snippet captions, there are several options placement:

1. in the general text area (above or below the photo)
2. within the image, and
3. overlaying the top or bottom of image.

Default placement is in the text area.

(i) To *create a caption*:

1. Click on the image (photo, sketch map, drawing...)
2. Click on 'Insert Snippet', then 'Add Caption'.
3. Type in the caption and delete the text already there. Do not use '&' in the caption.
4. Select either 'top' (caption above the image) or 'bottom' (caption below the image).
5. Click on 'Insert'.

(ii) To *alter a caption's position within the text area*:

1. Click on the caption or the image.
2. Click on 'Insert Snippet', then 'Add Caption'.
3. Re-insert the caption text and change the position setting.
4. Click on 'Insert'.

(iii) To *place a caption inside the image area*:

1. Create the caption first, as above.
2. Click on the image.
3. From the styling tools in the right hand column, select either 'Caption over top' or 'Caption over bottom'.

This alters the caption to a strip the same width as the image, with white text and transparent grey background.

(iii) To *alter the text* of a caption: just edit it in the cms editor frame.

Notes:

Image with a caption needs to be in a plain text paragraph or in its own paragraph, not on same line as a heading. If you attempt the latter, the caption will pick up the heading size and styling.

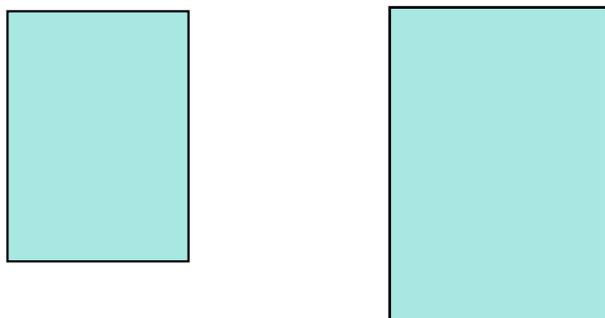
### 9.3.3 Clear Floats

#### 9.3.3.1 Introduction

1. These are layout tools mostly used for positioning text relative to images. These tools:
  - a) help you to prevent awkward text-wrapping
  - b) keep relevant text close to an image.
2. You will often clear floats while positioning photos or other images. (Section 9.2, Section 9.3.1.2)
3. *Don't fudge* via lots of 'enters' to get text down below an image:
  - When visitors scroll down the webpage on their phones, they will encounter a large blank space. They think there is nothing else to see, and scroll no further.
  - The website will look messy on tablets and small laptop screens.
4. Always check your published webpage on various sized screens, in case you have not produced the effect you intended.

#### 9.3.3.2 Clear All Floats

Eg you have a photo(s) inserted and positioned (left/right justified etc) in the draft webpage, and want to keep all text above or below them; not next to the photos.

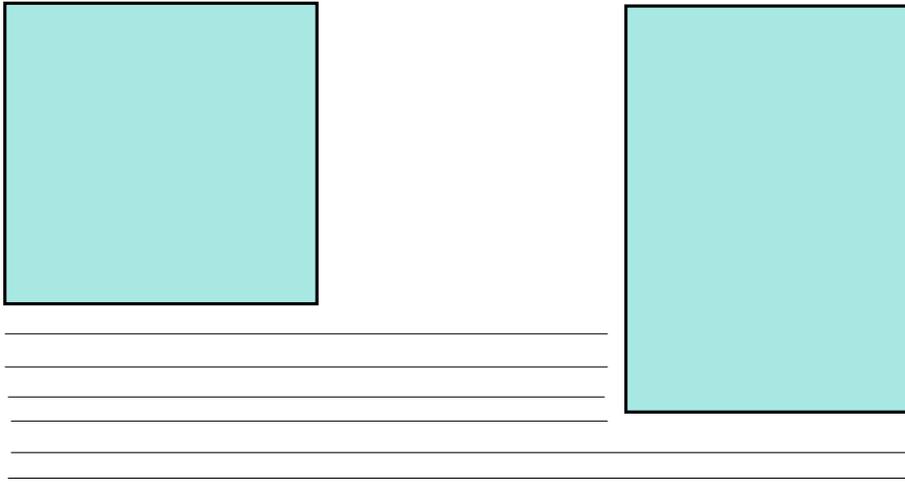


1. Go to the *end* of the portion of text which you *want to remain beside* the image.
2. Press 'Enter' to start your next paragraph. Or if your next line of text is already typed in, click anywhere on/at the start of that line.
3. Click on 'Clear All Floats'.
4. This paragraph now starts on the line immediately below the image.

### 9.3.3.3 Clear Righthand/Lefthand Floats

These tools are useful when you have images of different lengths on each side of a webpage, and you want the text to run beside one image but not the other.

It is easiest to explain by an example:



(i) Here, the paragraph clears only lefthand images. To achieve this:

- Click on the paragraph.
- Select 'Clear Lefthand Floats'.

(ii) If you want to 'Clear Righthand Floats' instead:

- Click on the paragraph.
- Remove any other float style first.
- Select 'Clear Lefthand Floats'.

This will drop the paragraph down further, below the large image. (So would 'Clear All Floats', in this case).

### 9.3.3.4 No Floats

If no floats are cleared, this is how text and images will appear on a large screen:



On a phone, the large photo would come first, then the smaller photo, then the text.

### 9.3.4 Borders & Shadows

Use the righthand styling tools.

1. The range of options (eg border colour, rounded corners) is preset for your webpage template. This limits the styles, so your website doesn't turn into a hotchpotch.
2. Click on the image in the cms editor frame.
3. Click on the Image tool you want in the right hand styling column (eg 'Image Border').
4. Always undo a style before applying one which can't operate at the same time.  
To turn off a style:
  - a) click on the image
  - b) click on the current Image styling tool (it is highlighted) that you want to turn off.
5. Forgotten to undo styles before adding a conflicting one?
  - a) Remove *all* right hand styling from that image and start again.
  - b) If you have access to html code, check that it has all cleared correctly.
6. An image saved on your computer already has a border? Remove it with your photo processing software, or by cropping it out if you use the Bizazz photo processor. This will keep image outlines, shadows etc consistent across the website.

### 9.3.5 Captions & Figures

1. An image with a caption is called a *figure*.
2. If you have added a caption already, then you are editing a figure rather than just an image.
3. The editing process is similar, but uses Figure styling tools instead. The caption always tags along with its image, whatever changes you make.
4. Figure styling tools appear in the right styling column, whenever you click within a figure. They include tools for alignment and for caption position.
5. To *create a caption*: see Section 9.3.2.3.
6. *Edit* the caption text within the cms editor frame.
7. To *reposition a caption* at the top or bottom of its image: see Section 9.3.2.3.

### 9.3.6 Clear Floats Tools

*Clear floats* tools are used to manage:

- what text stays directly next to each image (used for text directly relevant to the image), and
- what text must go below it (text unrelated or less relevant).

See Section 9.3.3.

*Do not fudge* by using lots of Enters instead of clearing floats; you dont want your webpage to have big areas of blank screen on mobile phones.

### 9.3.7 Image Full Width

A full-width image is displayed right across the webpage.

1. Choose a suitably large image:
  - for a webpage template has a side column (eg for a submenu), c700 pixels wide
  - for a webpage template without side columns, c1000 pixels wide.
2. Press 'Enter' to create a new paragraph. Insert the image.
3. Click on the image. Select 'Image Full Width' in the right hand styling tools column.

## 9.4 Delete Webpage Image

For product images, see ??.

For gallery images, see Section 11.3.5.3.

For general webpage images:

1. In the cms editor frame, click on the image and press 'Delete'.
2. The image has been removed from this webpage, but it is still stored within the Bizazz system.

To delete an image from the website backend altogether: see Section 9.5.2.

## 9.5 Image Icons in CMS Editor

### 9.5.1 Introduction

In the Insert Image dialogue, each image displayed has a series of icons underneath it.

These are part of the webpage editor program which SuttonNet did not write. It predates responsive web design, so it can be unreliable.

The icons are mostly not used, apart from the Delete and Rename functions.

### 9.5.2 Delete Image from Bizazz

1. This is not the same as deleting an image from a particular webpage. (Section 9.4)
2. *Delete* removes the photo, sketch etc altogether from your website's management system (but not from your own computer files).
3. Use this:
  - To clean out outdated images (eg a photo of your old business location)
  - When you replace images with better quality or better sized ones.
4. Don't delete unless you really need to. The image might still be in use on other pages of the website; or it might be useful later on.
5. To delete general webpage images from the website backend:
  - a) In the cms editor, click on 'Insert Image'.
  - b) Find and click on the thumbnail of the image.
  - c) Click on the rubbish bin.
  - d) Check that no webpages retain a (now broken) reference to the deleted image. Delete any that you find (simply use backspace/delete keys or highlight and Ctrl + x, in the cms editor frame).
6. To delete product images, see ??.
7. To delete gallery images, see Section 11.3.5.3.

### 9.5.3 Rename Image

1. In the cms editor, click on 'Insert Image'.
2. Find and click on the thumbnail of the image.
3. Click on *Rename* (the middle icon).

4. Edit the filename.
5. After you rename an image, check that no webpages have a (now broken) reference to the old image name. Update the filename on every webpage which already had this image on it:
  - a) Sign out a webpage with the image on it.
  - b) Click on the image.
  - c) Click on 'Insert Image'.
  - d) In the dialogue box, edit the filename to the new name;

Or if you have access to html code:

- a) Sign out a webpage with the image on it.
  - b) Go to html code view of code where the image file is inserted on the page.
  - c) Update the filename there.
6. If renaming an image which has a corresponding Large version: both need to be renamed (Section 8.2.2.4).
7. You may create a problem with matching files on your computer to renamed images on the website. You can rename both; or rename the website image using only a minor variation.

# 10 PDF & Similar Files

## 10.1 Introduction

### 10.1.1 Non HTML Files on Websites

A website can include documents which are not in the usual webpage format (html), but instead in a text or text + graphics document.

Usually these are in .pdf format.

PDFs are useful for:

- printable forms
- documents which need to be reproduced in their original format, eg official reports, brochures
- very long documents, such as terms and conditions
- regular newsletters &c. The latest issue can be placed online quickly, without needing to update links.

### 10.1.2 Pro's & Con's

Advantages to using PDFs on your website:

- Easy for site visitors to print, without wasting space on headers, menus etc.
- Official documents remain obviously genuine and untampered with.
- Webpages stay small enough to load quickly, while the site offers a large amount of information.
- Saves much copying & reformatting of large documents, to get information onto the website.
- Regular communications (eg monthly newsletters) which appear both in print and online only need to be produced and formatted once.
- The latest version of any document is easily uploaded.

Disadvantages:

- .pdf files are not mobile phone friendly. On a small screen, a site visitor has to scroll horizontally and read the document bit by tiny bit.
  - Some newer phones have built-in PDF readers, which make it easier.
- PDFs are not visually impaired-friendly; ie screen readers cannot interpret them.
  - There are voice PDF readers available now for the visually impaired, but text to speech technology is not word perfect.

### 10.1.3 Webpage or PDF?

Here are some factors that affect whether you add information to your website as a HTML webpage, or in PDF format:

- Do you use the same document offline, eg in hard copy?
- Will your business benefit from spending time on re-formatting this information as a webpage?
- If the same information is presented in different formats online and offline, how will you make sure that all versions are kept up to date?
- Do site visitors want to print this information? Will this be easier from a 'print version' of a webpage, or from a PDF?
- If this is a form: is it more useful to you and your site visitors as an online form? An online form automatically collects data into a database. (Chapter 14, Chapter 12)

## 10.2 Insert/Edit PDF File & Link: Webpage Editor

### 10.2.1 Insert PDF & Link

Go to the editing page (Section 4.3):

- If you are ready to add a link: use the webpage which will link to [one of] the file[s] you are about to upload.
- If you want to load several PDFs at once, without completing the links to them): use any draft 'test' webpage.

The 'Insert PDF Link' dialog box works like 'Insert Image' (Chapter 9).

1. Click on the text that will become a link [or click on some dummy text on the test page]. Click on 'Insert PDF Link'.
2. If the PDF you want is already loaded to the website backend:

- a) select the folder which you think the PDF is stored in, from the dropdown list
  - b) select the PDF, by clicking on its filename in the list
  - c) go to (5) below.
3. To load PDF(s) to the website backend (documents folder):
- a) set the top directory + folder dropdown box to the folder which you want this file to go into. Create a new folder name, if needed:
    - i. Select the right toplevel folder in the dropdown box, if this is to be a subfolder.
    - ii. Click on the yellow folder + red star icon. The 'Create New Folder' box appears.
    - iii. Give the new folder a meaningful name:
      - Do not use spaces or punctuation; letters and numbers only.
      - Use - (hyphen) between words. Use all lower case. A consistent naming style helps SuttonNet when we are troubleshooting or programming your website.
    - iv. Click on 'Create Folder'.
    - v. If you use the wrong topfolder:
      - Re-create your subfolder under the correct folder
      - Contact SuttonNet to delete the unwanted subfolder. Don't leave it there; documents will probably get put in the wrong place.
  - b) click on 'Browse', below the list. This takes you to the documents that are stored on your computer
  - c) select the right PDF. You can select more than one, if you will need them for this or for other webpages
  - d) click on 'OK'/'Save' in the file selection dialog box (exact term depends on your computer's software)
  - e) back in Bizazz, the file's name has appeared next to the Browse button. Click on 'Upload' just to its right
  - f) you can keep uploading more PDF files, if you want. But make sure that you set their destination folder correctly first
4. Create the link by selecting the correct newly loaded file from the dropdown list.
5. URL and Title fill automatically. You can edit the Title. Title appears when the mouse hovers over the link text:

- to help the site visitor decide whether this link will be helpful to them;  
or
- to stir their enthusiasm to visit a document that you think is important.

6. Click on 'OK'.

Bizazz automatically sets the PDF link to 'open the PDF in a new window'. On a site visitor's browser, the starter webpage will remain open, while the PDF opens in a new tab.

## 10.2.2 Managing Documents

### 10.2.2.1 Basics

Maintain website documents in good order. Look out for documents that will never be used again, and outdated versions. They can confuse you (or others) when building file links on the website.

If you want to delete a PDF file: a link to that file might not be needed on the webpage you are editing, but perhaps there's another link to it elsewhere on the website. Contact SuttonNet to delete it. We will locate all links to the file, and ensure your website still functions fully.

### 10.2.2.2 Icons in Create PDF Link Dialog

*Trash*, *Rename*, *Cut* and *Copy* icons in the Insert PDF Link dialog: see Section 9.5.2. These are not usually used. Cut and Copy are from an older webpage editing era and not useful.

If you rename a PDF's filename in Bizazz, it might be hard to identify its source file on your business computer. That matters:

- when you want to update the PDF; or
- if you are trying to work out if a particular file has already been loaded to the website.

### 10.2.2.3 Edit PDF Link

To edit a PDF link:

- highlight the link text, open Insert PDF Link and select the PDF you want. Bizazz will change the link to the new destination file; or
- follow the same instructions using Insert Web Link (Section 4.4.4.14), and select the file from 'documents' listed in the left column. Click on '+' next to 'documents' or next to a documents subfolder name, to show the full list.

#### 10.2.2.4 Update PDF Stored in Bizazz

To update a PDF file which is already on the website:

1. Make sure that *all* links, link text and link titles on your website which relate to this PDF remain relevant.

Eg:

- a) Link on webpage 1 is labelled ‘More about the Easter Fair’, with link title ‘Easter Fair Poster’; not ‘2016 Easter Fair Poster’;
  - b) Link on webpage 2 is labelled ‘This month’s newsletter’; not ‘May Newsletter’.
2. Retain the same filename and overwrite the file, so that:
    - you don’t need to update link details on webpages;
    - you don’t forget to do so, and have dead links;
    - you don’t accumulate unused documents in the website backend.
  3. If you need to archive the earlier version of the PDF: before updating it on your computer, save a copy with a distinctive filename. Include a date written/superseded, if that helps identify it. Bizazz does not archive PDFs; it only archives old webpages.
  4. On your computer, copy the document to a nonPDF format and edit it; or create an entirely new document.
  5. Save the new/revised document as a .pdf with the same filename as the earlier PDF.
  6. Load this updated file into Bizazz.
    - It will overwrite the earlier PDF.
    - Every link (new or existing) to this PDF will find the up-to-date file.

## 10.3 File Transfer Protocol (FTP)

### 10.3.1 Overview

The easiest and safest way to load a PDF to your website is to use the Insert PDF Link icon in the webpage editor.(Section 4.4.4.15) This chapter relates to an older system which some clients still use: File Transfer Protocol (FTP).

In reality, you do not *transfer* but *copy* document files to the website backend.

You can mess up your website badly by misusing FTP:

- Do not copy into any folder other than ‘documents’.
- Do not copy or remove anything that you don’t understand.
- Name all files carefully before transferring them.

## 10.3.2 Getting Started

These are instructions for using the FTP program Firezilla in the Firefox browser. You will need your FTP user name and password, which are supplied by SuttonNet.

### 10.3.2.1 Install Firezilla

1. If you use Linux: go to Package Manager, search for filezilla and if it’s there, click ‘Download’ (fastest method).
2. Otherwise: go to <https://sourceforge.net/projects/filezilla/> and click on ‘Download’. Follow the instructions, selecting ‘Accept’, ‘Run’ etc when prompted. There’s a lot of steps, but not many decisions.

### 10.3.2.2 Add Your Site

1. Open Filezilla.
2. Left click on blue icon at top left.
3. In the frame that opens (Site Manager):
  - a) in right column (General tab):
    - *Host* is your website name (no https:// or www. needed)
    - *Protocol* FTP
    - *Encryption* Use explicit FTP over TLS if available
    - *Logon type* Normal
    - *User* your current user name
    - *Password:* your current FTP password.
  - b) in left column:
    - Click on ‘New site’.
    - Click ‘Rename’ below. Type in your website’s name instead. Click anywhere outside the box.
4. Set which directories (folders) Firezilla will open as default whenever you use it:

- a) Select Advanced Tab;
  - b) Set *local directory* to the folder where you keep the files that get transferred regularly to your website;
  - c) Set *remote directory* to /httpdocs
5. At the bottom of this frame, click 'Connect'. A frame comes up, saying there is an unknown FTP security certificate.
  6. Tick the box to 'always trust certificate in future sessions' and click 'OK'.
  7. You are now ready to transfer files to your website any time.

Either close by clicking on X at top right of screen; or if you want to load files now, go to Section 10.3.3.

### 10.3.3 Load Files to Website

1. Open Filezilla.
2. Right click on blue icon at top left or click on dropdown arrow next to it. Select your site name.
3. In right column, select the correct target folder.
4. In left column (your computer files), left-click on file you want to transfer. Right-click and select 'Upload'.
5. Wait for message: 'File transfer successful' in top part of screen.

### 10.3.4 Update PDF

To update a PDF file which is already on the website:

1. Make sure that *all* links, link text and link titles on your website which go to this PDF will still be relevant. Word these in a way that won't go out of date; then you don't need to change anything:

Eg:

- a) Link is called 'More about the Easter Fair', with link title 'Easter Fair Poster'; not '2016 Easter Fair Poster';
  - b) Link is called 'This month's newsletter'; not 'May Newsletter'.
2. Firezilla gives you options to overwrite or to rename the file. You will retain the same filename and overwrite the file currently on the website. Advantages:
    - you don't need to update any link details on webpages;

- you don't risk links on your website going to the wrong file; or dead links not matching any file;
  - you don't accumulate useless documents in the website backend, which no longer have links to them.
3. On your computer, copy the document to a nonPDF format and edit it; or create an entirely new document.
  4. If you need to archive the earlier version of the PDF: before updating it on your computer, save a copy there, with a distinctive filename. Bizazz does not archive old versions of PDFs.
  5. Save the new/revised document as a .pdf with the same filename as the earlier PDF.
  6. Open Firezilla; select your website from the top left dropdown menu.
  7. On the right hand (server) side of the page, select the correct target folder.
  8. On the left side, open the correct folder and select the correct document name.
  9. Right-click on the filename on left side and select 'Upload'.
  10. A dialogue box asks if you want to overwrite the current file. Tick 'Write over this file only' or equivalent. If you will only ever use FTP for overwriting files, you can make this the default action.
  11. On completion: there will be a 'File transfer successful' in top part of screen.

Any links on the website to a document of this filename, go to the updated version. The older version is no longer in the website backend.

### 10.3.5 Download Files from Website

1. Open Filezilla.
2. Right-click on blue icon at top left; or click on dropdown arrow next to it. Select your site name.
3. In left column, select the correct target folder.
4. In right column (your website files), left-click on the file you want to download. Right-click and select 'Download'.
5. Wait for message: 'File transfer successful' in top part of screen.

### 10.3.6 Delete File

Eg if you load a file to the wrong folder: right-click on its name and select 'Delete'.

### 10.3.7 Close Firezilla

You don't need to disconnect from the server. Firezilla does this itself each time it finishes a file transfer. Just close Firezilla, via the cross at top right.

### 10.3.8 Link to PDF

After a PDF is loaded to the website, it is filed there under 'documents'. To link to the PDF from a webpage:

1. Open Bizazz. (Section 2.1)
2. Open the cms editor for the appropriate webpage. (Section 4.3.1.1)
3. Make sure that the wording in the link text (on the webpage) will remain valid, if the PDF is updated.
4. Highlight the text and create a link, using a link title which will not date. Eg a document named newsletter.pdf and link 'Read our latest newsletter' are easier to maintain than julynewsletter.pdf and 'Read July newsletter':
  - a) see Section 4.4.4.15; or
  - b) see Section 4.4.4.14:
    - i. On the left side of the link dialogue box: click on the '+' next to 'documents'.
    - ii. This displays all document filenames. Click on the one you want.
    - iii. Insert the link.
5. Style the link. (Section 5.2.3)

### 10.3.9 Other Functions

FTP also has other functions, such as uploading photos to a website. These are outside the scope of this manual.

Don't experiment. There are key differences in the website folder/file setup when using FTP for loading images, rather than the usual methods. (Chapter 6, Chapter 11, Chapter 12)



# 11 Galleries & Products

## 11.1 Getting Started

### 11.1.1 Introduction

Ecommerce product data and photo galleries are managed within the same area of Bizazz: the Products menu. They have a similar database structure.

Well managed products and photo galleries boost search engine optimisation. Multiple photos with keyword-rich titles and alternate text help to generate more visitors to the website:

- via searches for images related to your business or location
- via search engines indexing the text of titles and alternate text. (Section 9.1.3)

A photo gallery can draw site visitors back again and again, to see new photos.

### 11.1.2 Products Menu

Go to Products in the main menu. This area allows you to:

1. Manage photo galleries (Section 11.3):
  - display photos in separate named galleries
  - add, delete or re-order photos.
2. Manage a database of ecommerce products (??):
  - add, edit or delete products
  - add photos of products
  - group products together for displaying on the same webpages
  - re-order products on a webpage.
3. Manage custombuilt lists of *standardised* information displayed on a webpage in a set format, eg:
  - organisation names and contact details

- events listings.

Use relevant 'products' functions for this (??).

Working in the Galleries & Products section of Bizazz is very similar to working in the Contacts area (Chapter 12).

## 11.2 Photo Galleries

### 11.2.1 Getting Started

1. This section covers planning and managing an effective gallery which is also practical to maintain.
2. For gallery planning: see Section 11.2.2. For gallery setup and management: see Section 11.3.

### 11.2.2 Plan Photo Gallery

#### 11.2.2.1 Goals

A large random collection of odd-sized photos isn't inviting or useful.

Make your gallery:

- attractive
- relevant
- easy for site visitors to look through and find photos of special interest.

Keep to your goals for the gallery webpage and for the whole website:

1. What topic(s) do you want your gallery to cover and why?
2. What are your customers/site visitors interested in seeing? In coming back to see again?
3. Will creating and maintaining a gallery webpage be effective for your business?
  - It might be worthwhile in terms of good customer relationships, rather than immediate sales.

#### 11.2.2.2 Practicalities

Gallery photos must automatically:

1. load in the required size

2. display on the right page (and in the right gallery album, if there is more than one).

The Bizazz Photo Processor (Chapter 7) and Classifications system (Section 3.3) do this reliably.

Classifications aren't easy, and they need to be right. For many websites, the initial gallery setup is best done by SuttonNet; but you will need to work through the questions below, to get the gallery you need.

1. Do you have sufficient good quality photos? How will you get more, when needed?
2. Would the photos be better organised as 2 or more galleries, or as albums within a gallery? One webpage or more?
3. A gallery need not be a standalone page, or have dozens of images. A small gallery can be incorporated into a general webpage.
4. How many photos across a full screen (often 3 or 4)?
5. What shape are most photos likely to be: long and narrow, square etc?
  - SuttonNet will set up a standard 'gallery' photo sizing accordingly, for both thumbnail and enlarged versions. (Section 6.3.2)
  - You can't make all photos exactly the same size and shape, without distorting them. Standard sizing refers to a rectangle of maximum photo height and width. Some photos might be of maximum width but less height, and vice versa.
6. Will the photos date easily? How often will the gallery need to be updated?
7. How much time can you allocate to the gallery?
8. How many photos do you want to show?
  - A large gallery can be overwhelming.
  - But if you are publishing photos of participants at an event, having plenty of photos can connect with more people.
  - You could display only part of your collection at one time, and update it to keep people coming back to your website:
    - Promote the renewed gallery on the homepage, in your (bricks and mortar) store, etc.
    - Unpublished photos can be stored in the gallery within Bizazz, but marked as 'inactive'. It's easy to publish them and to hide others at a later date.
9. Contact SuttonNet to discuss options and to create a good gallery structure.

## 11.3 Gallery Management

### 11.3.1 Overview

Photo galleries utilise several areas of Bizazz.

To create a gallery and display photos in it:

1. Create the (empty) gallery framework.
2. Create any *albums* (subgalleries). These are shown on the webpage as a menu of album names within the gallery area. One album is open (displays its photos) at a time.
3. Insert the gallery on a specific webpage.
4. Load photos from your computer to the website.
5. If you have not used the Bizazz photo processor for (3): then insert photos into the gallery/albums.
6. Text accompanying text each photo is added at step (3) (if using the Bizazz photo processor) or (4) (if not).

For gallery planning and design: see Section 11.2.

### 11.3.2 Create Photo Gallery

#### 11.3.2.1 Create Gallery

Go to Classifications.

Create a gallery scheme, if there isn't one there already. (Section 3.3.4.3)

Create a new classification within the scheme 'gallery'. Give it a name that makes clear to all Bizazz users, the kind of photos which will belong in the gallery. Eg:

1. Summer
2. Winter.

If you need to subdivide the gallery, see Section 11.3.2.2.

#### 11.3.2.2 Create Albums

1. Photo albums are used to group related photos *within* a larger photo gallery. Albums make it easier for site visitors to find the photos that they most want to see.

Eg:

- Adaminaby Campdraft 2015
  - Adaminaby Campdraft 2014
  - Adaminaby Campdraft 2013.
2. On the webpage, album names appear as a clickable menu, usually across the top of the photo gallery.
  3. One album is open on the webpage at a time, ie photos from only one album are visible at any time:
    - The album with Sequence number 1 is displayed when a site visitor first arrives at the webpage.
    - If you have no sequence numbers set, Bizazz orders albums in alphabetical order by album name.
  4. To create albums:
    - a) Go to Classifications.
    - b) Select the gallery classification which you want to divide into albums.
    - c) Each album is a subclassification of that gallery. Create as many subclassifications as you want. (Section 3.3.4.3)
    - d) Specify the order in which you want albums to appear, using Sequence.
    - e) Remember that the album with seq number 1 will be displayed on the webpage as default. Make sure it is interesting and inviting.

### 11.3.2.3 Multiple Galleries

You can have more than one photo gallery, instead of (or as well as) albums within galleries.

- Albums within a gallery are published on the *same* webpage.
- Multiple galleries can be displayed across *different* webpages (or in different locations on one page).

Just repeat the process for creating a photo gallery.

You can apply a sequence (order) to galleries, using classification sequencing. (Section 3.3.4.2)

To display multiple galleries on one webpage, see Section 11.3.8.

### 11.3.3 Add Photos: Photo Processor

1. The built-in photo processor in Bizazz is the easiest way to load photos and other images for galleries:

- It ensures all photos go into the right folder, in the website backend.
  - It is fast.
  - It processes photos, loads them and adds associated text in one operation.
  - You can load photos in bulk.
  - All photos are sized correctly.
  - It easily loads thumbnail + enlarged photo pairs, and names them so they work correctly.
2. See Chapter 7. Select the right subfolder for the particular gallery/album, before you start.
  3. For the final steps of uploading: see Section 7.3.3.
  4. In Products – External Files, give each photo a sequence number within its gallery/album. This sets the order in which the photos are displayed. (Section 11.3.5.1)

## 11.3.4 Add Photos: External Files

### 11.3.4.1 Overview

Use this method for:

- Photos which need extensive processing.
- Photos already stored in Bizazz, which you want to add to a gallery.

See Section 6.2.1 for naming image files for successful website management.

Images will be loaded one by one to the website backend, into the correct subfolder for the gallery.

Then access each photo via Products – External Files. (Section 11.3.4.2) This area of Bizazz stores all files which have been loaded from your computer to the products folder in the website backend.

These files are not necessarily connected to ecommerce products; some external files haven't been attached to a product yet. Some files are there for other purpose; 'Products' is a versatile area.

### 11.3.4.2 Add Image to Gallery

- (i) If the photo you want is already in Bizazz:
  - Go to Products– External Files.

- Use the Search filters to locate the photo. It often contains 2 photo files (small + enlarged versions), so it has a ‘catalogue name’ for the pair, rather than filename.
- In Products – External Files, give the photo a sequence number in its gallery/album (Section 11.3.5.1).

(ii) If the photo is not already in the website backend, in the correct size:

- Load the photo. (Chapter 8)
- In Products – External Files, give the photo a sequence number in its gallery/album (Section 11.3.5.1).

## 11.3.5 Edit Galleries

### 11.3.5.1 Order Photos

In Products – External Files, use the search filters to show all photos in the relevant gallery/album (ie select the right classification/subclassification).

Re-order photos using the sequencing numbers.

Click on ‘Update Sequence’.

### 11.3.5.2 Move to Another Gallery/Album

Simply add the photo to one gallery (Section 11.3.4.2) and delete it from the original one (Section 11.3.5.3).

### 11.3.5.3 Delete Gallery Photo

(i) Use this method if the photo is in use elsewhere on the website, or if you might need it again later. To *delete a photo from a specific gallery/album*:

1. In Products – Select External File, use the search filters to show only photos in the relevant gallery/album (ie select the right classification/subclassification).
2. In the far right column, tick all photos which you want to remove from this gallery/album.
3. Click on ‘Delete Selected’.
4. The file has not been deleted from Bizazz altogether. It is still shown in the full Products – External Files listing.

(ii) To *delete a gallery photo completely from the website backend*:

1. Go to Products – Select External File. Clear the filter boxes and click on ‘List’ to show all product external files.

2. Tick the rightmost box for all image files which you want to delete.
3. Click on 'Delete Selected'.

#### 11.3.5.4 Edit Photo Details

You can edit Catalogue name, Alt text, Title and/or Description.

You cannot change filename or filetype specifications.

1. Go to Products – Select External File.
2. Click on the image thumbnail.
3. Edit the text.
4. Click on 'Update External File'.

#### 11.3.6 Add Gallery to Webpage

1. Go to the Edit Article page for that webpage. (Chapter 4)
2. Click on the line where you want the photo gallery to start.
3. Click on 'Insert Snippet'. (Section 5.1)
4. Select 'Insert Gallery'.
5. If you have more than one gallery, select from the dropdown box.
6. Click on 'Insert'.
7. Publish the edited article. (Section 4.7)

#### 11.3.7 Delete Gallery from Webpage

1. Go to the Edit Article page for that webpage. (Chapter 5)
2. In the cms editor frame, click in the photo gallery placeholder.
3. Backspace or press Delete.
4. Publish the edited article. (Section 4.7)

#### 11.3.8 Multiple Galleries per Page

To *display multiple galleries on one webpage*:

1. Follow the process for inserting a photo gallery (Section 11.3.6).
2. Repeat it where you want each gallery displayed.

To *revise the order* in which multiple photo galleries are displayed on the same webpage: see Section 3.3.4.2.

# 12 Contacts

## 12.1 Contacts Database

### 12.1.1 Overview

#### 12.1.1.1 Business Contacts

1. *Contacts* can be people, organisations or businesses that a business deals with, eg:
  - customers on an ecommerce site
  - anyone who has access to a login area of the website
  - anyone who has expressed interest by submitting a form on the website or by contacting it another way.
2. The contacts database on Bizazz stores contacts' essential details.
3. The contacts database is a resource for email campaigns (Chapter 15):
  - Contacts are classified into various groups, which are customised for your website.
  - These groups can be targetted for specialised mailouts, newsletters or offers
4. Working in the Contacts section of Bizazz is very similar to working in the Products & Galleries area (Chapter 11).

#### 12.1.1.2 Unique Identification

1. The contact database needs a unique identifier for each contact.
2. This ID has to be information which is held for *every* contact:
  - Many contacts don't divulge more personal details than necessary.
  - There are legal (privacy) restrictions on businesses holding personal information.

3. Bizazz differentiates between contacts by their *email address*. This isn't perfect, but it is the best option.
4. If two enquiries/contact forms are sent to your business from the same email address, the database will:
  - treat them as the same contact, and
  - update the older information.
5. If the same person contacts you/buys online twice but uses a different email address, Bizazz will treat this as two different contacts.

#### 12.1.1.3 Data Fields

1. The contacts database has a set of predefined data fields (eg first name, last name, postcode...).
2. You can set up the website database to meet your needs, by:
  - choosing from these predefined fields, and
  - creating new fields.
3. Fields in all contact and ecommerce forms on the website need to match with the fields in your database.
4. Email address and first name are always compulsory fields in a Bizazz contacts database.
5. You can make any other fields compulsory too.
6. Remember that businesses may only collect and hold limited data about individuals (see Section 12.1.1.4).

#### 12.1.1.4 Privacy

1. A website's contacts database contains personal information which must be treated responsibly. Access to this area of Bizazz should be limited on a need-to-know basis.
2. To restrict a Bizazz user's access to the Contacts area, see Section 3.2.2.
3. Clients are responsible to ensure that the collection, storage and use of personal data via Bizazz conforms to all relevant legislation, including:
  - Commonwealth Privacy Act 1988
  - Privacy Regulation 2014
  - Privacy Amendment (Enhancing Privacy Protection) Act 2012 ('Privacy Amendment Act').

## 12.2 Contacts Administration

### 12.2.1 Add Contacts

#### 12.2.1.1 Overview

1. Contacts' data comes:
  - a) directly through the website (Section 12.2.1.2), or
  - b) from outside sources:
    - i. imported in bulk to the database as a csv spreadsheet (Section 12.2.1.3), or
    - ii. added manually (Section 12.2.1.5).

#### 12.2.1.2 Add via Online Form

When a site visitor submits a contact or ecommerce form on the website, the relevant data in that form goes into the contacts database automatically.

#### 12.2.1.3 Add via Bulk Import

This is a fast powerful tool for adding information into the website database.

But unless the spreadsheet and Bizazz database tables match each other perfectly, your data will turn into gobbledygook.

Follow these instructions *exactly*.

If you will need to import data into your Bizazz database via spreadsheet more than once, set up a correct spreadsheet template and use it each time.

(i) Prepare your contacts spreadsheet:

1. Bizazz matches the spreadsheet information to the database by recognising column titles in the first row of your spreadsheet.
2. *Row 1* must have all database field names correctly entered as the column titles:
  - Use exactly the *same case* (upper/lower/combination) as the database field names. Check these in Configuration – Elements.
  - Ensure there are *no unwanted spaces* typed into any cell in this row.
3. The columns can be in any order.

4. Each contact classification has its own column.

Column titles are: classification.scheme1, classification.scheme2,... (see Section 3.3).

5. Any extra data columns which do not match fields in the database will be ignored by Bizazz.
6. Save the spreadsheet file in .csv format.

(ii) When your spreadsheet is ready:

1. Go to 'Contacts – Import'.
2. Click on 'Browse'.
3. Select your prepared CSV file of contact data.
4. Click on 'Import'.

#### 12.2.1.4 Download CSV Button

1. This button on the 'Contacts – Import' page is for troubleshooting if importing a spreadsheet has created problems in the contacts database.
2. It enables you or SuttonNet to inspect the last csv file which was uploaded to the database, and check it for formatting or other errors.

#### 12.2.1.5 Add Contact Button

To add a contact manually:

1. On the Contacts page, click on 'Add Contact'.
2. Complete the contact's details.

## 12.2.2 List of Contacts

### 12.2.2.1 Getting Started

1. To search, view, edit or delete contacts: go first to the Contacts page in the main menu.
2. A *summary* of your entire contact database will be displayed, showing:
  - last name
  - first name
  - status
  - email

- phone
  - date on which the record was first created, and
  - classification(s). (Section 3.3)
3. On some browsers, the summary won't be displayed when you visit this page for the first time. Click on 'List' to the right of the search fields, or press Enter.
  4. If you searched the database using a search filter Section 4.2.3.3 last time you visited this page, *and* did not remove the filter, not all contacts will be listed. To show all contacts: clear the filters and press Enter/click on 'List'.

### 12.2.2.2 Contacts Summary

1. To *search* for a particular contact or group of contacts: see (Section 12.2.3).
2. To *view or edit details of a contact*:
  - Click on the last name, if there is one.
  - If not, click on the first name.
  - See Section 12.2.6.
3. To *delete* a contact: see Section 12.2.5.  
Note: Deletion is risky. Read the section in full.
4. To tick/untick a column of tickboxes beside *all* contacts' names: click on 'Select All' above that column.

## 12.2.3 Search Database

### 12.2.3.1 Getting Started

1. Go to the Contacts page.
2. You can use any or all of the search boxes above the contact list. Then click on 'List' or press Enter.
3. The following sections show some ways that searches can work specifically with contacts data.
4. For more information about searches in Bizazz, see Section 4.2.4.

### 12.2.3.2 Name Term

This is text which forms part or all of the *first or last name* of contacts that you want to search for.

Eg: sm will find all Smiths and Esme Bell.

### 12.2.3.3 Date Range

1. Some uses are:
  - Review very old data, and decide whether these contacts should be made Inactive (Section 12.2.4).
  - Find recent contacts.
2. You can restrict your search to:
  - Contact entries *created* within a specified range of dates; or
  - Entries *last updated* within a specified date range.

### 12.2.4 Status

1. A contact's Status can be:
  - a) *Active*: can receive automated emails via Campaigns (Chapter 15), or
  - b) *Inactive* (pending deletion): the contact will be overlooked in any email campaign, or
  - c) *Validated*: in effect, active and validated. A validated contact has an email address which has been confirmed to be correct.
2. Contacts can be Active without being validated. It just implies that they have not *replied* to any of your emails.
3. Resetting status to Inactive is useful as a precautionary step, before fully deleting a contact. (see Section 12.2.5)
4. A contact's status can be validated in several ways:
  - a) Status can be changed manually on the contact's details page; or
  - b) Status can be changed automatically:
    - The contact submits a form from your website.
    - He/she is sent an automated reply email, with a link back to the website.
    - If the contact clicks on that link, this confirms that their email address is genuine. Bizazz automatically updates their status to Validated.
5. A contact's status is edited on their Contact Details page (Section 12.2.6).

## 12.2.5 Delete Contact

1. Deleting a contact sounds simple, but it needs to be treated with great caution.
2. Deletion removes from the website database *all* records associated with the contact, including:
  - any (outstanding or filled) orders
  - any unpaid invoices.
3. It is wise to change a contact's status to Inactive for a while, before deleting their data altogether. (Section 12.2.4)
4. To delete a contact:
  - a) On the Contacts page, select the tickbox in the righthand column against that contact's name.
  - b) Click on the 'Delete Contacts' button at the bottom of the column.
5. You can use the search filter to display a group of contacts, and use 'Select All' to delete all of them.

## 12.2.6 Contact Details

### 12.2.6.1 Getting Started

1. To view a contact entry:
  - Click on their last name in the database summary on the Contacts page.
  - If the contact has no last name, click on their first name.
2. On most websites, this takes you to *full details* for that contact.
3. On a few websites, there is an additional, simplified contact data page: see Section 12.2.6.3.
4. Edit any fields, then click on 'Update Contact' at lower right of the page.
5. If you don't want to change any information, click on the 'Contacts' menu item to return to the Contacts page.

### 12.2.6.2 External Files

1. Photos or other files associated with a contact, are listed under External Files on the contact's Details page.
2. Eg:

- a) A club member emails a PDF document and a photo for use on the club's website:
    - Information from the PDF is edited and included in a webpage.
    - The photo is cropped for publication.
    - The *original* image file and *original* PDF would be stored in the contact details for that member.
  - b) An interior designer's customer loads photos of their lounge and dining area when they complete a website form:
    - The photos are automatically filed with the contact's other data, ready for developing design ideas and quotes.
3. To add an external file to a contact: see Section 12.3.

### 12.2.6.3 Quick Contact Data

1. Some websites have two pages per contact:
  - A simplified version of the contact's details, and
  - The full contact details page.
2. Which version comes up when you click on the contact's name, depends on which you used last.
3. The 'quick contact data' is selected to match the website's requirements.
4. You might use the Quick Contact Data page most of the time, the full contact Details page only rarely; or vice versa.
5. Edit information on the Quick Contact Data page, then click on 'Submit'.
6. If the fields you need are not displayed on the simplified page:
  - a) Click on 'Show Details' at top left.
  - b) View and/or edit the full contact Details page.
  - c) Click on 'Submit'; or  
Untick 'Show Details', to return to the quick contact data page; or  
Click on 'Contacts', to return to the Contacts page.
7. For directory sites:
  - Updating contact records *does not normally update the listing on a web-page*.
  - Bizazz websites usually feature manual processing for published listings.
  - This is a safeguard against scurrilous, mis-spelt or wrongly categorised data being submitted via online forms.

To add an external file to a contact's details: see Section 12.3.

#### 12.2.6.4 Notes

This section is for any notes relevant to this contact, which you need to keep handy for all staff who have access to this part of the website.

## 12.3 Contacts - External Files

### 12.3.1 Overview

1. Some businesses/organisations hold files associated with certain contacts, eg:
  - A logo used for customising products
  - Photos (eg: happy customers operating their UBeaut radio controlled utes)
  - Text documents.
2. Some uses for this feature:
  - To file unpublished photos for possible later use.
  - To retain original images, so that they can be re-sized to various sizes.
  - To retain a record of a document in its unedited form, after content has been extracted.
3. This section describes how to load external files to the contacts database and associate them with a specified contact.

### 12.3.2 Getting Started

1. Go to the Contact Details page for the contact concerned.
2. Click on 'Add External File'. This takes you to 'Select External File'.
3. Either:
  - (i) the file is *already in* the Bizazz file system: go to Section 12.3.3; or
  - (ii) you will *need to upload* the file from your own computer to Bizazz: go to Section 12.3.4.

### 12.3.3 Find Bizazz File

Start from Section 12.3.2.

To find a file which is already in the Bizazz system, ready to connect it to the contact:

1. Search for the file on the page 'Select External File'.
2. Select the file that you want from the search results.
3. Go to Section 12.3.5.

### 12.3.4 Upload File

Start from Section 12.3.2.

Follow these steps to load a file to the Contacts area, ready to connect it to the contact:

1. Select '/contacts' in the Folders dropdown box.
2. Click on 'List' or press Enter.
3. To create and use a subfolder: see ???. This will place the file correctly inside Bizazz.
4. Click on 'Add External File'.
5. Click on 'Small File Browse'. It displays the files on your computer.
6. Select (open) the file that you want.
7. Bizazz has returned to the 'Select External File – Upload File' page. Your file's original name appears beside 'Small File Browse'.
8. Supply a meaningful *Name* for the file within Bizazz:
  - This filename will appear in the contact's details. It needs to identify the file easily for all database users.
  - It might not be the same as the filename in your computer files.
  - The Bizazz file will ideally be *identifiable* with the original file, to save confusion in future.
9. If the file is an *image or file which might be displayed on your website*, create a *Title*:
  - Often the Title appears when a mouse hovers over a photo or a file link on the website.
10. If the file is an *image which might be displayed on your website*, create *Alternate Text*:
  - Alternate Text is what a visually impaired person will hear when they visit the webpage.
  - It is also used by search engines.

- A webpage photo with Alt Text can come up when someone is searching on keywords which are used in the Alt Text. So it can help lead visitors to your website.

11. *For photos only:*

If you want to upload a large *and* a small version of the photo (ie thumbnail and large photo):

- a) Now click on 'Large File Browse'.
- b) This allows you to upload the large version of the photo.
- c) It also connects the small + large photos inside the Bizazz file system. This is essential.

12. Click on 'Update External File'.

- If the file is a photo, it will be displayed on the Upload File Page with the message, 'External file 'name' updated'.

13. You can continue to upload external files to the Bizazz file system for this contact, or for other contacts.

### 12.3.5 Connect to Contact

After loading and/or locating a file in the Contacts – External files area:

1. Click on 'up level' at top right, to return to Contacts – Add External File.
2. In the right hand column (Select), tick *all* the files which you want to add to this particular contact's details.
3. Click on 'Select'.
4. Bizazz returns you to this contact's Details page. All the selected files are now listed here under External Files.

## 12.4 Contacts Report

for future development



# 13 Understand Campaigns

## 13.1 Introduction

### 13.1.1 Outline

1. The next few chapters cover website forms and email campaigns. This chapter gives definitions and explains how a campaign's components fit together. Different clients will need different sections of this chapter.
2. The Configuration and Campaigns areas of Bizazz were set up by a database specialist. They have abstract terminology to cover a broad range of website uses. We've given plenty of examples to clarify the terms.
3. Campaigns are a simplified form of customer relations management. They send standardised emails or SMS's & auto-response webpages to contacts and website administrators.
4. Clients with Developer/Advanced versions of Bizazz can set up and maintain their own campaigns. For clients with Business level cms access, SuttonNet sets up and edits campaign details.
5. Most websites have a standard campaign with a basic contact form set up during website development. Ecommerce websites use an invoice campaign for online sales, set up and maintained by SuttonNet.
6. SMS campaigns [facility to be added] require additional setup outside of Bizazz.

### 13.1.2 How Campaigns Work

1. Campaigns are linked with *online forms* (Section 13.3) and no campaign can happen without an associated *event* (Section 15.8). Without setting up instructions via Configuration – Events, nothing would happen when a site visitor submits the form.
2. An event in Bizazz triggers specific actions whenever a particular website form is submitted. These actions are *campaigns* or *campaign steps*.
3. A campaign automatically:
  - a) shows a particular webpage to the person submitting an online form;  
and/or

- b) sends standardised emails or SMS's to:
  - i. a pre-defined group of contacts from the contact database, and/or
  - ii. the website owner/administrator.
- 4. To create a functioning campaign:
  - a) build an online form and insert it in a webpage
  - b) create a confirmation webpage
  - c) create a campaign
  - d) create campaign item(s)
  - e) set up event(s).

### 13.1.3 Plan Ahead

Campaign creation or editing needs thorough planning. Small errors can lead to big trouble.

- Design the overall campaign sequence step by step
  - Define trigger events accurately
  - Decide what information is needed
  - Who needs to know when a website form has been submitted?
1. *Purpose*: what do you want to achieve through your website?
  2. *Strategy*: will campaigns and forms help to achieve this?
    - Is the \$/time input worth the outcome?
    - How (and how often) do you want to connect with your site visitors/customers/other contacts?
      - Newsletters, contact or purchaser followup emails, SMS...
    - How will you assess whether this part of your website is successful, and whether to extend or curtail it?
  3. *Practicalities*:
    - What data do you need from contacts to achieve your purpose?
      - What data is essential/desirable? Needed permanently/temporarily?
    - What is the best way/time to collect this data – initial enquiry, first purchase...?
    - From your customers' viewpoint:
      - Will it benefit them to pass this information to you?
      - Are you asking too much? Faced with a complex or intrusive form, site visitors might ring you instead; or they might go to a competitor's website. (Section 13.3.5)

## 13.2 Using Databases

### 13.2.1 Database

1. A *database* is a structured set of tables which hold information (data). Your website database is stored on a SuttonNet server.
2. A Bizazz website database can hold:
  - ecommerce data (eg sales, orders)
  - products data (eg items, prices, photos)
  - contacts data (eg customers, people who have submitted any online form on the website).
3. Databases are useful for:
  - managing and storing large amounts of information
  - filing data consistently
  - fast direct access to any item of data
  - reporting
  - sorting
  - grouping similar data (customers from NSW, skis vs clothing vs snow-board products...) to work with them separately.

### 13.2.2 DB Management

1. Databases aren't intricate multifaceted phenomena. They consist of lots of plain 2-dimensional tables. Disappointing but true.
2. Designing the right database tables and the right elements (Section 13.2.3) within those tables, is what makes your website database powerful.

That's SuttonNet's job; but to do it, we need you to tell us how your business ticks - or how you would like it to tick.
3. A database is only as good as the data that's in it.
  - a) Know what kinds of information you need for your business, now and in future. Online forms must be designed from the start with the right questions, to collect all the data that you need.
  - b) Don't hold unnecessary data.
  - c) Keep product data up to date (prices, products, availability).

- d) Occasionally clean up old unused data (eg delete contacts from many years ago, who have never contacted you again or made a purchase). (Section 12.2.5)
  - Discontinued products are often not deleted from the database; this could mess up sales reports. Instead, mark them as inactive. (??)
- e) When importing data in bulk via spreadsheet, the order and titles of columns *must* match the database exactly. (??, Section 12.2.1.3). Otherwise your data will become corrupted.

## 13.2.3 Elements

### 13.2.3.1 Introduction

Elements connect the data entered into online forms to the website database.

1. *Elements* include:
  - a) fields for which data is stored in the database, with their specifications; and
  - b) any other fields in a form or an auto response email for which data is *not* stored permanently in the database, with their specifications.
2. Go to Configuration – Elements in the main menu, to see all the elements which are used (or could be used) in any form on your website.
3. To add a new element see Section 14.2. We’ve put this in the chapter on building forms, because this is the most likely time you will want a new element.

### 13.2.3.2 Element Settings

1. Click on an element name in Configuration – Elements, to see its default specifications.
2. You can:
  - alter some of these settings
  - add new elements
  - set some specifications of an element to be different only when it is used in a particular form.

Eg: Say a ‘comment’ element has maximum 265 characters as the default setting for datalength.

- This default setting is used on a general enquiry form.

- On an ‘employment expressions of interest’ form, the same element is used with a different label, eg ‘Tell us about yourself’, for an enquirer to submit a brief autobiography. Datalength is reset to allow >265 characters.
3. Many default element specifications are the same for all websites.  
Eg: The element ‘email\_address’ is essential on all Bizazz websites.
  4. Other default specs are set individually for each website.  
Eg: For many businesses, the text typed into a Comments field on a form will never be needed after that enquiry is dealt with. The element ‘comment’ is set up as a *transient* element. (Section 13.2.3.5)  
But for an interior design business, this data might be held permanently, to build up a profile of the contact’s preferences. The element ‘comment’ is set up as a *stored* element. (Section 13.2.3.4)

### 13.2.3.3 Types of Elements

1. An element is:
  - stored (Section 13.2.3.4),
  - transient (Section 13.2.3.5), or
  - classification (Section 13.2.3.6).

### 13.2.3.4 Stored

1. *Stored Elements* are for data which is retained in the database.
2. Stored elements are broken down further, into:
  - a) *contact* elements (eg: first\_name, last\_name, postcode)
    - Contact elements are held in the Contact table of the database; or
  - b) *product* elements (eg: product\_name, product\_code, product\_description)
    - Product elements are held in the Product table of the database; or
  - c) *contact message* elements.
    - Contact message elements are held in the Contact Message table of the database.
3. A contact element is only used for data relating to contacts, eg address.

4. A product element relates to ecommerce products; but it can also cover other products/services that you sell.

Eg: An enquiry form for a produce store has a field for ‘What products are you interested in?’, offering options such as poultry, equine, fencing, stockfeeds... Although its online store only sells equine items, the store can still use its website database to list its customers’ interests and send them targetted emails on fencing specials &c.

5. A Contact Message Element is a date-stamped message, linked with a particular contact.

This feature allows you to store and view all messages from a nominated contact.

Eg:

- Weekly reports from staff located outside the office are submitted via a website form to which only staff have access.
- Information such as hours worked, number of clients seen, are Contact Message Elements:
  - connected to a specific member of staff (contact)
  - date-stamped with the date on which the form was submitted.

Eg:

- In the interior design example above (Section 13.2.3), the Contact Messages table is where comments from a customer keen on art deco are stored.

### 13.2.3.5 Transient

*Transient Elements* are for data which is not stored permanently in the database; only temporarily in the *transition* from submitted form to response email.

Comments are the most common transient element:

- A site visitor submits an enquiry via online form.
- The text of their query is in a ‘comment’ box.
- That text is automatically emailed to the website owner so that they can answer the question; but it is not kept in the database with the contact’s name.

### 13.2.3.6 Classification

1. *Classification Elements* relate to the classifications set up for your website (Section 3.3) that relate particularly to your website products and/or contacts.

2. Each classification element has a parent classification associated with it. Each possible response to the form field matches a child classification of that parent.
  - Therefore a classification element used in a form has a limited set of responses (eg a dropdown box).
3. How data from the form is used, depends on which child classification is chosen when the form is filled out.

Eg:

A membership form has a classification element called `membership_type`, with options (the child classifications) 'Associate/Full'.

- This allows Bizazz to auto-email Associate members their own welcome email and to include them in subsequent email campaigns directed only at Associate members.
  - Full members receive a different new/renewing member email. They also receive a notice at the appropriate time, re voting at the AGM.
4. Classification elements often work in with event filters. (Section 13.4.2)

## 13.3 Objects, Forms & Attributes

### 13.3.1 Introduction

This section covers how online forms work. To build or edit forms: see Chapter 14.

Forms interact with the *website's database*. Forms collect contact data and other records, which are then stored in the database. The database structure needs to match the fields in each form, or information will be lost.

Forms interact with *other webpages and/or automated emails* (Section 13.5.2). Most forms need at least:

1. an automated *email alert* system, and
2. an automated *response* to the person submitting the enquiry.

Eg: a basic contact form has:

- a) a standard email to the website owner with the (autofilled) details of each online enquiry, and
- b) an allied 'Thank you for contacting...' webpage, which only appears after a site visitor submits the form.

### 13.3.2 Objects/Forms

1. For formbuilding purposes, the term *object* in Bizazz means an online form. [Objects can also be notifications of payments/bookings, reports, or forms used *within* Bizazz for maintaining the website (eg ‘Add Product’ is a form).]
2. The ‘Configuration – Objects’ page lists all the online forms which are already on your website. From here, you can:
  - create new forms
  - edit existing forms.
3. Forms are classified into 3 categories:
  - a) contact forms
  - b) product forms
  - c) general forms.
4. Each object (form) needs certain specifications, such as:
  - a) *which elements* to use (Section 13.2.3)
    - Choice of elements is limited by the form category.
  - b) *how to display* each one (as a tickbox, dropdown box, radio buttons, text box, etc)
  - c) each field’s *position* on the form.

### 13.3.3 Attributes

1. After an element (Section 13.2.3) is added into a form, it needs some details added or perhaps changed, which are specific to that form only: eg its position on the form.
2.

An element + these form-specific details = an *attribute*.
3.

To look at it from the other end: what we usually call a form field (the box) + its size + its position + its label + its connection to the website database = an *attribute* of that form.
4. Elements are general; attributes are built from elements, and are specific to one form.

Eg:

Below is a mini form with an attribute `email_address`, which has been built from the element `email_address`.

This attribute has:

- a *field* of size 7 (out of maximum of 12 units for full width)
- a *position* on line 3 of the form, and
- a *label* ‘Contact Email’, instead of the default label ‘Email’.

None of these form-specific features comes from the element `email_address`.

\*First Name

\*Business

\*Contact Email

- The *label* for an attribute on a form can be different from the default label for that element.

Eg:

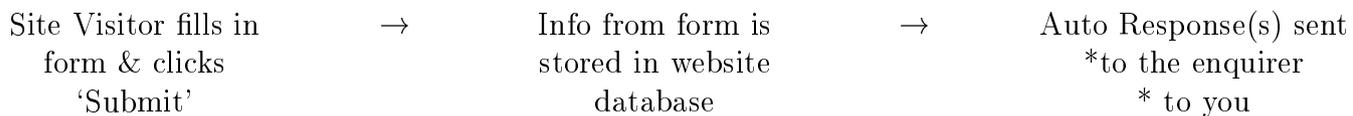
- Element `membership_no`; element label ‘Membership no’
- Attribute `membership_no`; attribute label ‘What is your membership number? If you don’t know it, leave this field blank.’

- An attribute can be *required* or *optional*.

- The same element (say, `phone_number`) could be optional for a general enquiries form, but essential when submitting a booking form.

- Edit checks* are optional restrictions on acceptable content for a field (eg: phone numbers must be all numerical, you can set a maximum no of characters for a text field). These can be set specifically for each form.

### 13.3.4 How Forms Work



- Submitting a completed form needs to trigger automatic emails:

- to site administrator (forwarding the enquiry) and/or
- to the site visitor.

2. Often a confirmatory webpage appears on the site visitor's browser, to show that a form has been submitted successfully.
3. Data from specific fields is transferred to the website database.
4. An email to the website owner holds data from the form that is necessary for a response. It might include data that won't be retained in the database. After receiving the email, you can deal with the customer enquiry.
5. A new contact is automatically added:
  - to the contacts database
  - to all relevant email campaigns.

### 13.3.5 Forms: Pro's & Con's

1. Website visitors often prefer to email/phone rather than complete a form.
  - They may be reluctant to get on a mailing list.
  - Too detailed a form will put people off, eg if they only have a simple question.
  - A form can seem restrictive or impersonal.
2. Use forms only when:
  - a) you need *specific* information from all customer enquiries, or
  - b) you want to build a database of contacts for email campaigns. (Chapter 15)
3. Keep your email and phone contact details prominent on the website, as an alternative.
4. Forms can be designed for use by all website visitors, or for 'members only'/'staff only' areas of a website.
5. Website forms are ideal:
  - to collect data to store in a contacts database
  - for reports from staff: eg staff working at another location
  - for easy data entry by staff outside the office, eg to amend a job quote or job status
  - for customer requests/orders requiring special data such as model number, year etc
  - when you need other specific information: eg preferred dates and numbers of adults/children for accommodation; membership or registration applications; requests for manual quotes.

## 13.4 Events

### 13.4.1 Introduction

1. An event connects:
  - an object (online form, payment/booking notification...) to
  - a campaign (often an automated email or a series of emails).
2. Events control which object (form), when it is submitted, leads to which campaign (action).
3. An event is *fired* (ie triggers a campaign) only if the right conditions are met. Some events are not fired every time that the form is submitted. (Section 13.4.2)
4. This section covers how events work. To set up or edit an event, go to Section 15.8.

### 13.4.2 Event Filters

1. *Event Filters* direct each contact into a targetted campaign, depending on their answers to the online form. Eg:

A South Australian winter specials email is sent only if:

  - a) the enquirer's location is SA, and
  - b) they have ticked a product interest box for Woolly Mammoth Socks.
2. Event filters often make use of classifications. (Section 3.3)
3. Event filters run along the lines of:

'If values x,y,z are selected, then...' or 'If a particular classification is selected in Field A, then...'

Eg 1: You have different offices in each State/Territory (we'll include ACT with NSW). Each State/NT has its own email address. You can:

1. send 7 response emails within a single campaign, from the local email address to customers in that State/NT, and including local content;
2. send an email alert after a form is submitted, to the appropriate State/NT office.

A contact in Queensland who submits the form will automatically receive your Qld emails, with specials on cyclone proof sheds.

A person in South Australia submitting the same form will receive SA emails, and no cyclone proofing offer.

The Queensland office won't be notified when a SA enquiry comes through, and vice versa.

- You have one online enquiries form (*object*) for website visitors to fill in.
- The *event* is submitting the enquiry form. This connects to the email *campaign*.
- *Event filter* is the State shown on a completed form.

Eg 2: *Event* is submitting a membership form. This connects to a national show promotional *campaign*.

*Event filter* is 'Selected the child-classification Associate\_membership'. (Section 3.3.2)

The campaign directs all Associate contacts into a *targetted SMS campaign* to encourage Associates to enter for Associate classes at the national show.

## 13.5 Campaigns Steps & Items

### 13.5.1 Campaign Steps

1. A campaign step is one action (email/SMS) within a campaign.
2. A campaign can have multiple steps, carried out immediately or over many months.
3. Each step occurs a specific number of days or months after the previous one.  
Eg:

Step 1: Send Christmas specials email to all 'Customer' contacts in late November

Step 2: Send reminder email 2 weeks later

Step 3: Send post Christmas sale email 3 weeks later.

Each step is an email sent to a specific group of contacts from the website database.

### 13.5.2 Campaign Items

#### 13.5.2.1 Introduction

The actual emails, SMS's, newsletters etc sent under a campaign are *campaign items*. Each item needs to be set up in full in Bizazz, and connected to the right campaign.

Note: response webpages are not set up within Items, but as non menu webpages in the cms editor. See

### 13.5.2.2 Variables

Campaign items often have variable, as well as standardised, content. These are automatically filled in on the email that you receive, each time someone sends in a contact form from the website

Eg: an auto email advising the website owner that a contact form has been submitted, has these variables set up:

- first name
- last name
- email address
- comments/query.

To set up variables and variable tests: see Section 15.6.7.

### 13.5.2.3 Types of Items

1. *Emails/SMS's to a single recipient* (eg purchaser/enquirer/website owner):

- Email recipient is controlled by a variable, defined when creating the item in Bizazz. (Section 15.6.7)
- Recipient's name and email address/phone number are inserted automatically each time the campaign runs.
- If your website has a responsive email facility added, you can generate emails which (like a responsive website) are easily read on a mobile phone.
  - The email content arranges itself to suit the reader's screen
  - For ecommerce, the whole sales transaction including customer invoice can be conducted via phone.
- See Section 15.6.

2. *Bulk emails/SMS's* (eg a newsletter):

- A group of contacts is defined for each campaign.
- Contacts for each *step* can be further restricted by event filters, so that some emails go only to a subclassification of the campaign's contacts.

## 13.5.3 Preset Campaigns

### 13.5.3.1 Standard Campaign

1. This is a campaign in response to a basic online enquiry form being submitted.

2. It is partially set up on all Bizazz websites from scratch, and customised for each website during site development.
3. The standard campaign:
  - displays a customised thank you/acknowledgement webpage
  - emails the website owner/administrator with details of the enquiry
  - adds new contact data to the contacts database, if your website uses one.

### 13.5.3.2 Invoice Campaign

1. This is a campaign in response to an ecommerce order being submitted from a website. Even if a website does not use ecommerce, there is often an invoice campaign partially set up. It is a standard feature of Bizazz.
2. Each invoice campaign is customised: eg business logo on the invoice.
3. The invoice campaign:
  - a) emails an invoice to the customer
  - b) alerts the website administrator, by emailing the same invoice to them.
4. The Bizazz ecommerce system manages ecommerce and contact database updates following an invoice, including stockcount if used.
5. Invoice campaigns are managed by SuttonNet only. Do not edit or delete an invoice campaign or associated items, even if your website does not use ecommerce.

## 13.5.4 Manual vs Automatic

### 13.5.4.1 Automatic Campaigns

*Automatic* campaigns:

- operate on pre-set dates
- send out a series of connected emails/SMS's
- are triggered by the number of days/months since the last campaign step
- are also used for automated responses after an online form is submitted (eg display acknowledgement webpage to the site visitor).

'Automatic' is only relative, contrasting with the *always* manual process of sending newsletters.

- Promotional emails/SMS's in an automatic campaign need to be updated from time to time, but not *every* time that the campaign runs.

- If your website has automatic campaigns:
  1. know all about the emails being sent out
  2. keep their content up to date.

#### 13.5.4.2 Manual Campaigns

*Manual* campaigns:

- are triggered only when the website owner manually releases them (Section 15.7)
- are often used for newsletters, which need to be updated before each mailout.

#### 13.5.5 Active vs Inactive

A campaign can be:

- *active* (will run when all conditions are met), or
- *inactive* (temporarily suspended).

If a site visitor submits a form online which is connected to an inactive campaign, Bizazz:

- *will* accept their contact details in its database, and
- *will* attach the contact to this campaign, but
- *will not* run the campaign until you change its Status.

## 13.6 Settings & Release

No longer used



# 14 Forms & Reports

## 14.1 Introduction

### 14.1.1 Overview

1. This chapter describes how to:
  - build or edit online forms
  - ensure that the data they collect is stored and used effectively.
2. Most Bizazz websites are already supplied with a basic contact form. You might want to edit this or create other forms.
3. Use the *Configuration* menu for creating and maintaining forms.
4. Only add or edit *non-ecommerce* online forms.
  - All essential forms for ecommerce (eg billing and delivery details) are built and maintained by SuttonNet.
  - If you need changes to invoices, order forms or other ecommerce forms: contact us.
5. Every new form needs to be integrated with:
  - a) a campaign (Chapter 15), and
  - b) the website database. (Section 13.2.1)
6. Most online form requirements can be met by Bizazz. If needed, SuttonNet can add features to the system. We can also customise text colours, fonts and font sizes, to make your forms consistent with your business look, or better suited to your clientele.
7. Some websites need a complex arrangement of multiple interrelated forms. A contact builds up their profile over time. This can be done. The contact may be classified, and receive emailed information, according to their responses to multiple forms; you don't need to include every possible sort field (Section 13.4.2 Section 15.8.4), in a single form. Contact SuttonNet if you think this is the way you need to go.

### 14.1.2 Legal Limitations

1. Only collect appropriate, useful contact data which will:
  - identify your contacts, and
  - help to generate business income for you.
2. *Don't hold data on individuals without their consent, and/or which you do not need* in the course of your business. It is illegal.
3. *Australian law requires that businesses do not send 'unsolicited' emails:* ie using email addresses obtained without the owners' permission.
4. If someone has contacted your business, and provided their email address voluntarily (either through emailing you, or in response to you asking for it – by form or otherwise), you can collect and use this data to send them emails. They have expressed interest in your goods/services.
5. You must provide an 'opt out' route – and act on this, if a contact requests. Use the Unsubscribe facility. (Section 15.2.2.3)
6. It might not be possible to delete a contact's details from your database altogether. Eg: they might have an outstanding order, or have purchased a product for which they need emailed support updates in future.
  - Ensure the contact is removed from relevant email campaigns.
  - If requested to do so, remove them from your database as soon as possible.

### 14.1.3 Spamming

Online forms are vulnerable to attack by auto form completion software or by time-wasting responses from idlers. Spammers can overload your email with multiple fake submissions. These obscure the genuine enquiries and add rubbish to your database.

1. SuttonNet blocks most simple spamming robots from accessing your forms.
2. Your options are:
  - a) Attempt to identify human enquirers:
    - by image verification checks/captchas: 'Type the characters in this image' etc.
      - These can be read by some software
      - They can be annoying and too hard, especially for the visually impaired
      - They can deter genuine enquirers;

- by asking inane questions like ‘What is the month after March?’ which computer programs probably won’t be able to answer.
  - Like captchas, these can be irritating
  - Keen spammers can write into their spamming programs the answers to your set of questions;

b) Live with the risk and delete nonsense responses.

Contact us if your site is targetted by spammers sending in forms in bulk.

### 14.1.4 Essentials

1. See Chapter 13 for definitions and how website forms work.
2. A form is made up of labelled fields which a site visitor fills in.
3. As you build or edit a form, you specify which fields collect data for the database, and which database columns they relate to.
4. Once you have added a field to a form, *it is not easy to remove*. Deleting a field will mess up your database records.
  - Plan carefully what data you need to collect, before you start.
5. Forms and email/SMS campaigns often use classifications. (Section 3.3)
  - You must have classifications fully set up before you start building a form.
6. Online form layout changes on different sized screens.
  - Always test a new or revised form in tablet and phone view.
  - Generally, any fields on the right move underneath fields which were to their left on a larger screen.
7. After you have finished editing, either Save Draft or Publish (these 2 buttons are in different positions on left side of the form editor interface). If you have edited a ‘form within a form’: republish both forms.

## 14.2 Add New Element

### 14.2.1 Getting Started

1. Go to Configuration – Elements in the main menu.
2. This page lists all elements currently in your website system.

3. Check to see if there are existing elements that can cover all the fields you will need on your new form.
4. Create a new element only if you need to collect any information which isn't already covered by these elements.
  - Don't be overly concerned about the element *names*. You can change the label on the form, if the default element name/label isn't suitable. But it's best to choose an element that is reasonably close to what you want; it's easier for others editing the form to understand what you intend.
  - Your main concerns are:
    - a) what *information* the elements refer to, and
    - b) what they do with it. (Section 13.2.3.3)
  - Once you have created a new element, it is not easy to remove. Deleting an element usually messes up your database records badly.
5. By creating a new element, you:
  - add a new column to a table of the database, or
  - create a temporary holding bay for some information which you will need, but don't want to store long term, or
  - create a pathway to the Classifications area of Bizazz.
6. Click on 'Add Element' near the top of the page.
7. You are now on the 'Select Element – Add Element' page.
8. All fields on the Add Element page except 'Data Length' *must* be filled in.

### 14.2.2 Type

All the correct fields for you to complete will be displayed after you have selected your Element Type.

Select one of:

- Store element in database (Section 13.2.3.4). Then go to Section 14.2.3;
- Transient element (Section 13.2.3.5). Then go to Section 14.2.4; or
- Classification parent (Section 13.2.3.6). Then go to Section 14.2.5.

## 14.2.3 Stored Element

### 14.2.3.1 Element Name

1. Name of a stored element = name of its associated column in the database table.
2. This name appears on:
  - a) the Configuration – Elements page
  - b) the Configuration – Select Attributes page, when you add fields to a form.
3. Keep the element name simple and relevant.
4. Bizazz will automatically:
  - replace any spaces by underscores, and
  - replace any upper case letters with lower case.

### 14.2.3.2 Table Name

Which table of the database will your new column go into? Select from the dropdown box:

- Contact
- Product
- Contact Message.

See Section 13.2.3.4.

### 14.2.3.3 Data Type

Most forms can happily work with only 'Varchar (up to 255 characters)' and 'Text>255 characters'.

You can be more specific:

1. *Character* for a response which will be a single keyboard character: eg M, F.
2. *Date, Datetime* are self explanatory.
3. *Decimal* is in the format 'Maximum 11 digits followed by 2 digits after the decimal point'.
4. *Fieldset* is for SuttonNet use only.
5. *File* is for a field which uploads a file.
6. *Indicator* is for True/False fields; SuttonNet use only.

- We usually recommend Yes/No text boxes instead, because form users respond better to them.
7. *Integer* can be used for fields like ‘no of adults’.
    - A text field is more flexible: eg your customers might want to answer ‘5 or 6’.
  8. *Text > 255* allows more than 255 characters to be entered in to a field, but doesn’t require it.
    - Use this for larger text entry boxes such as ‘Your query’, ‘Comment’.
  9. *Time* is for SuttonNet use only.
  10. *Varchar(255)* permits up to 255 characters.
    - Use this for short text & numeric fields, like an address line.

#### 14.2.3.4 Data Length

This optional field sets a maximum length on the number of characters which can be stored in the database for this element. It has consequences for the layout of the form (see Section 14.3.4.2).

*Do not use for responsively designed websites unless the value you set is small.*

#### 14.2.3.5 Display Label

This is the default field label to be used on forms.

It can be overridden when you are designing a specific form (eg default label for `address_line_1` might be ‘Address line 1’, but altered to ‘PO Box/Street Address’ on one form).

#### 14.2.3.6 Description

Describe the element briefly. All users of Bizazz - including SuttonNet - need to know what the element is for, and whether to use it in a form they are creating/editing.

#### 14.2.3.7 Critical Steps

Go now to Section 14.2.6. There is still some work to do.

## 14.2.4 Transient Elements

### 14.2.4.1 Element Name

1. This name appears on:
  - a) the Configuration – Elements page
  - b) the Configuration – Select Attributes page, when you add fields to a form.
2. Keep the element name simple and relevant.
3. Bizazz will automatically:
  - replace any spaces by underscores, and
  - replace any upper case letters with lower case.

### 14.2.4.2 Form Category

Forms are classified into contact, product and general categories. The form category tells Bizazz which forms this new element can be added to.

Is this element related to contacts, products or neither?

Select an option from the dropdown box.

### 14.2.4.3 Other Fields

To complete the remaining fields: the process is the same as for Stored Elements (Section 14.2.3.3, Section 14.2.3.4 [usually not used], Section 14.2.3.5, Section 14.2.3.6).

Then go to Section 14.2.6. There is still some work to do.

## 14.2.5 Classification Elements

### 14.2.5.1 Parent Classification

The dropdown box shows all the major classifications set up for your website.

Select the desired parent classification.

### 14.2.5.2 Other Fields

To complete the remaining fields: the process is the same as for Stored Elements (Section 14.2.3.5, Section 14.2.3.6).

Then go to Section 14.2.6. There is still some work to do.

## 14.2.6 Almost There

1. Click on ‘Add Element’. This takes you to the ‘Edit Element’ page.
2. Information shown in the purple area is what has just been set up in the database. It cannot be changed.
3. Go to Section 14.3 to finish specifications. The new element has not been fully created yet.
4. Click on ‘Update Element’.

## 14.3 Edit Elements

### 14.3.1 Overview

1. Go to Configuration – Elements and click on the element name.
2. Information shown in the purple area *cannot* be changed.
3. Many fields in the grey area are for SuttonNet use only.
4. When you have finished all editing (or the initial settings, for a new element): click on ‘Update Element’.

### 14.3.2 Description & Label

Element description and default display label can be edited. For more information, see Section 14.2.3.6 and Section 14.2.3.5.

### 14.3.3 Default Value

1. A *default value* is a suggested response to a field, and is displayed on the form.
2. A site visitor has to change the value in this field, if they don’t want your suggested (preferred) answer.

Eg:

- Element ‘email\_me’
  - Element label ‘I would love to receive regular email updates from Cranky-mutts Puppy Training’
  - Default value ‘Yes’.
3. Type in the default value.
  4. If this element uses a selection box (tickbox/checkboxes/radio buttons/dropdown box) (it has a limited set of possible answers): go to (Section 14.3.5).

## 14.3.4 Other Fields (Grey Area)

### 14.3.4.1 Introduction

Most fields are for SuttonNet use only. Only fields which clients use are described below.

### 14.3.4.2 Input Size

1. This optional field sets the width (in characters) of the field (box) on the screen.
2. If input size is not set, the box size defaults to the width chosen by your browser.
3. If you have set a Data Length (Section 14.2.3.4), that value will automatically be used for input size.
4. Leave input size blank for *most* fields on responsively designed websites.
  - a) A specified input size might not be overridden by the responsive software.
  - b) An element like ‘comment’ often needs an input size:
    - to make the field look invitingly large
    - to bulk out an otherwise brief form, so that the webpage looks balanced.

### 14.3.4.3 Maximum Length

1. This sets the maximum number of characters which can be *typed into a field*.
  - This is not the same function as the maximum number of characters which can be *stored in the database* (Section 14.2.3.4).
2. If you have set a Data Length for this element, set Maximum Length to the same value.
  - This ensures that your customers can’t send data which your database can’t store.
3. Otherwise, maximum length is optional.
4. If you expect, or want to encourage, lengthy answers: set a large input size for the box that is typed into Section 14.3.4.2.

#### 14.3.4.4 Validation & Error Messages

1. All Bizazz forms give a default error message if any *mandatory* fields are not completed correctly.
2. Occasionally a form needs a customised error message other than the standardised messages such as ‘no input’ in a required field, ‘invalid length’, ‘invalid character type’ etc.
3. Validation pattern and error message boxes are for SuttonNet use only:
4. Contact us if you need:
  - a) non standard wording (a different error message) when a particular field is not completed correctly; or
  - b) an error message for a *non required* field.

Eg ‘Are you sure you don’t want to tell us your preferred maximum distance to travel? It will help us select the right puppy class for you.’

#### 14.3.5 Add/Edit Value

##### 14.3.5.1 Overview

1. This is used for an element which has a dropdown box or checkboxes/radio buttons: ie a limited set of possible responses.
2. Each row in the table:
  - is a ‘value’ for this element
  - corresponds to a possible choice when someone fills out your form.
3. If you set up a default value for an element with a selection box (Section 14.3.3): this element value needs to be fully specified here, as well as any other response options.
4. Either:
  - a) click on ‘Add Value’ to create a new value; or
  - b) edit existing *element values*, *value labels* and *value order*.
5. To keep adding values, click on ‘Add Value’ again.
6. The *Delete Value* button deletes the value in the same row as the button.
7. When you have finished all your settings for this element: click on ‘Update Element’.

### 14.3.5.2 Value, Value Label

1. Element value labels only affect how forms look, not the data in the database.
  - a) Value *label* is displayed on a form.
  - b) The element *value* that has been selected is recorded in the database.

Eg:

- A form includes a checkbox list to nominate product-line interests, so that the site owner can notify the contact of new product releases
  - One value label is 'Little People's Happy Ponies Motif', second is 'Wild & Woolly'
  - A customer ticks both boxes
  - The database records the element values 'happy ponies', 'wild and woolly' against this contact
2. If value label is the same as the value, it must still be filled in.
    - It is possible for a form to have a blank label, so don't leave label empty if you intend it to default to the value name
    - Just copy and paste the text from the value cell.
  3. Do not use quotes or apostrophes in element values. They are acceptable in value labels.

### 14.3.5.3 Value Order

1. Value order refers to the order in which the options appear on a form.
2. If you don't specify an order, element values are listed in alphabetical order of value label.

Eg:

- Element 'state'
- Element label 'State/Territory'
- Element values NT, WA, SA etc
- Value labels are same as the element values
- Value order not completed: order of options in the dropdown box is alphabetical:

ACT

NSW

NT etc

3. If there is no default element value set (Section 14.3.3), the value with order '1' is displayed as default inside the dropdown box/ticked in the checkbox set.
4. To ensure the form user *actively selects* a value, rather than skimming past and failing to set the field: display a blank option as your first value. This ensures that a value is actively chosen.
  - Set up an element value with value and value label both blank, order '1'.

### 14.3.6 Lower Table

For information only. This table is automatically generated and lists:

- all the Objects (forms) which currently use this element
- each form's name and type
- the label of the element on that form
- a description of the form.

It is a guard against deleting elements which are still in use, or using the same element for conflicting purposes on different forms.

## 14.4 Building & Editing Forms

### 14.4.1 Getting Started

Go to 'Configuration – Objects' in the Bizazz main menu.

You are now on the 'Select Object' page. From here, you can edit existing forms (Section 14.5) or create a new one (Section 14.4.2).

### 14.4.2 Create Form

#### 14.4.2.1 Add Object

On the 'Select Object' page, click on 'Add Object' near the top of the grey box. The first steps are like creating a new text file and saving it before entering any content.

#### 14.4.2.2 Object Name

Use a simple unique name for the form.

### 14.4.2.3 Object Category

1. The choice of *Object Category* affects which elements (fields) are available to include in your form. Choose from the dropdown box.
  - a) *Contact* is for response forms on your website (collecting contact information). Only the Contact category is normally used by clients.
  - b) *Product* is for forms to add a new product to the website database. Product forms are usually developed by SuttonNet.
  - c) Other object categories are for future development.
2. Leaving this box blank is *not* an option.

### 14.4.2.4 Object Type

Choose *Form* from the dropdown box. Other options are for SuttonNet use only.

Blank box means that no selection has been made yet. Leaving this box blank is not an option.

[For information only:

- *Contact detail* is for customised forms which a Bizazz user can use within the Contacts area of Bizazz, to add or edit contacts in the database. These forms are created and edited by SuttonNet only.
- *Payment* is for SuttonNet use only.
- *Product detail* is for customised forms which a Bizazz user can use within the Products area of Bizazz, to add or edit products in the database. these forms are created and edited by SuttonNet only.
- *Report* is for future development.]

### 14.4.2.5 Template

Form *template* options are set for your website. Most sites require only one form template.

If you have more than one option here: follow the instructions given during your cms training, or contact SuttonNet for help.

### 14.4.2.6 Description

Type a short *description* of the form's purpose.

### 14.4.2.7 Save Draft Object

1. Click on ‘Save Draft Object’. It is now a blank draft form:
  - without any fields on it
  - without any connection to the website, database or campaigns
  - with a filename and saved in Bizazz.
2. Bizazz stays on this page. Complete the form by adding attributes (Section 13.3.3, Section 14.5.2).
3. Then connect the form to all other relevant functions:
  - a) create a confirmation webpage (Section 5.1.7)
  - b) add the form to a webpage (Section 5.1.7)
  - c) create a campaign (Chapter 15)
  - d) create campaign item(s) (Section 15.5.1)
  - e) specify trigger event(s) (Section 15.8.2).

## 14.5 Edit Form

### 14.5.1 Getting Started

#### 14.5.1.1 Select Object

1. Go to the ‘Configuration – Select Object’ page in the main menu. This page displays forms and other objects by:
  - Object Name
  - Object Category
  - Object Type
  - Description. (Section 14.4.2)
2. Click on the form name (*Object Name*) that you want.
3. If you can’t see the right form:
  - a) use the filtered search function, similar to other pages in Bizazz (see Section 4.2.3.3); or
  - b) check if a search filter is already switched on and needs to be removed:
    - i. Clear the Search box so that it is blank.

- ii. Click on 'Filter'. All forms are now displayed in a single list.
4. This takes you to the 'Object Detail' page, where you can:
    - add, edit or delete attributes (Section 13.3.3, Section 14.5.2)
    - change the form layout.

### 14.5.1.2 Edit Object Details

1. The *top left corner* is the same layout as for creating a new form (Section 14.4.2). Here are buttons to:
  - a) start adding attributes
  - b) save your changes
    - Location of the Save button differs from other pages in Bizazz; don't forget to save your draft.
  - c) publish the revised form
    - *Publish* means 'replace any older version of the form'. Not all forms are available for any site visitor to see.
2. At the *bottom left* is a list of all attributes which are already on the form. You can edit their settings here.
3. At *right* is a mockup of your form.
  - Note: the Submit button is only part of a mock form, not a functional button for publishing changes.

## 14.5.2 Add Attribute

### 14.5.2.1 Select Elements

1. On the Edit Object page, click on 'Add Attribute' in the top left corner.
2. The page 'Add Object Attributes' appears. It lists all elements (Section 13.2.3) which:
  - *can* be included in the category of form that you are using, and
  - *are not already* in the form.
3. Use the search and filter function to find the elements you want, if needed. (Section 4.2.3.3)
4. Tick the box in the leftmost column, next to every element which you want to use.

5. Click on ‘Add Attribute’ at the top right.
6. You will be taken back to the Edit Object page. Partly built attributes are scattered across the mockup form at right. That is only because Bizazz doesn’t know yet where you want everything to go.
7. The form’s new attributes are all listed underneath any attributes which were already on the form, in the bottom left section of the page. These new attributes have default labels, row and sequence settings.
8. Go to Section 14.5.2.2 and Section 14.5.2.3.

#### 14.5.2.2 Position Attributes

1. On the Edit Object page: define where each attribute belongs in the form layout.
2. Set for each new attribute:
  - a) its *Row*
    - Horizontal row number of the form’s layout, as seen on a desktop computer screen; and
  - b) if required, its *Sequence*
    - If more than one attribute is displayed in the same row, what order do they appear in?
3. You can edit these for existing attributes too.
4. For a responsive website, the form layout will change on smaller screens. Right-most attributes will move underneath the left ones on the same row.

#### 14.5.2.3 Customise Attributes

1. On the Edit Object page, click on the name of an attribute in the lower left list.
2. The ‘Attribute Detail’ page appears.
  - Any changes you make here do not affect the general properties of an element.
  - Attribute Detail changes the look (labels, default settings,...) of an attribute on this form alone.
3. You can edit *Row* and *Sequence* here. It is often easier to use the method in Section 14.5.2.2; then you can see row and sequence numbers of all the other attributes and adjust them as needed.

4. You can insert a *Default value* which will appear on this form only.
5. An attribute can be made mandatory (*Input Required*) for this form, even if its element's default setting is not.
6. *Input Size* is not often used on responsive websites (see Section 14.3.4.2). It is most useful for expanding a Comments or similar field to a nice size:
  - for its particular purpose on this form; or
  - to improve the overall look and balance of the webpage.

For a text field, input size is number of rows in the field box.

#### 14.5.2.4 Field Labels

1. *Label* (field name on the form) can be edited.
2. To *position a label* relative to its field: see Section 14.5.2.5.
3. A *long label* (optional) can be inserted above a field for:
  - a subheading which covers the next few fields; or
  - instructions (see also 'Instruction Text' option below).

The long label appears *above* the attribute label. (You can have 'Long label' customised by SuttonNet to go underneath the relevant field label.)

4. *Instruction Text* (optional) appears only when the form user hovers their mouse over the attribute label. It helps the site visitor to understand more about what information is required.
5. For longer text, to insert paragraphs in a long label or instruction text: use a text editor and add in html code `<p>`, `</p>` where needed. Then copy all and insert in the relevant attribute.

#### 14.5.2.5 Grid

1. Three fields on the Attribute Detail page relate to sizing and positioning a field along a horizontal row. After you have used them once or twice, they are easy to understand.
2. A webpage is considered as being 12 units wide. The three *Grid Cols* fields specify how many units are used for an attribute:
  - a) for its offset (forced blank space to the left of it)
  - b) for its label
  - c) for its field.

3. These 3 together must add up to 12.
4. *Offset Grid Cols* is often set to 0.
  - The default form layout leaves a tidy gap between any fields which are occupying the same Row.
  - You can force a field to be indented further using the offset. Occasionally this improves the layout.
5. If *Label Grid Cols* is set to 0, the label will appear above its field. This is a common format for online forms.
  - If you want the label next to (to the left of) its field instead: try 2, 3 or 4 here, depending on the length of the label.
6. *Element Grid Cols* sets the field size:
  - 12 is full page width.
  - 6 (with 0, 0 for the offset and label grid cols) allows for 2 x equal fields on the same row: e  
Eg: first\_name last\_name
  - 4 is sufficiently large for a phone number field. It allows for an 8, 4 pattern on one line when viewed on a desktop.  
Eg: \*Email [8 units] Phone [4 units] comfortably occupy one line.

#### 14.5.2.6 Input Type & Flyout

Select input type according to the characteristics of the element used for this attribute and the expected answers for this field of the form:

1. *Checkbox* is for an element with multiple values, where more than one option can be selected.
2. *File Upload & HTML area* are for SuttonNet use only.
3. *Hidden*
4. *Hidden Preset*
5. *Hidden Preset Option*
6. *Preset*
7. *Select Checkbox Set* is for an element with multiple values, where more than one option can be selected.
8. *Select Dropdown List* displays all values of an element as a dropdown box (eg State/Territory); form user can select one only.

9. *Select Radio Set (Horizontal)* and *Select Radio Set (Vertical)* display all values of an element across the screen (if screen is wide enough)/down the screen. Only one value can be selected at a time.
10. *Text Area* is for elements like ‘Comments’; *Test Line* for ‘Address line 1’ and similar.
11. *Input Flyout* offers a short explanatory flyout comment to help users complete this field of the form.

#### 14.5.2.7 Other Settings

*Validation Pattern* and *Error Message* (Section 14.3.4.4) are for SuttonNet use.

## 14.6 Add Confirmation Webpage

A response/confirmation webpage can only be seen by a person who has just submitted an online form.

It is a brief reassurance that the submit button has worked: ‘Thank you for contacting us, we will get back to you shortly’ etc.

To create or edit a confirmation page: see Section 5.1.7.

## 14.7 Add Form to Webpage

To insert the form into a webpage and connect it to the confirmation page: sign out the webpage that will contain your new form. See Section 5.1.7. Follow the instructions in that section for testing too.



# 15 Build Campaigns

## 15.1 Introduction

1. Go to ‘Campaigns – Campaigns’ in the main menu. This page lists all campaigns currently associated with the website.
2. From here, you can:
  - view and edit campaigns
  - add new campaigns.
3. For terminology and how campaigns work: see Chapter 13.

## 15.2 Campaign Details Page

### 15.2.1 Getting Started

1. Go to ‘Campaigns – Campaigns’ in the main menu. Click on the correct campaign name in the list.
  - a) Use the Description column to help identify it.
  - b) If you can’t see the right campaign name:
    - i. use the Search facility and select one; or
    - ii. sometimes the list is incomplete, showing results of an earlier filtered (restricted) search. In this case:
      - delete all content from the search box
      - click on ‘List’ to show *all* campaigns and select one.
2. You are now on the Campaign Details page for that campaign.
3. To edit these fields: see Section 15.3.4.

## 15.2.2 Details

### 15.2.2.1 Name, ID, Description

*Campaign name* and *ID* define the campaign for users and in the database.

*ID* is automatically generated by Bizazz.

*Description* clarifies the campaign's purpose for all Bizazz users.

### 15.2.2.2 Operation, Status

*Operation* is for SuttonNet use and Developer-level hosting only.

This setting refers to how the campaign starts up: automatically or manually. See Section 13.5.4.

*Status* shows whether a campaign is switched on or off. For essential information on online forms associated with an inactive campaign: see Section 13.5.5.

### 15.2.2.3 On Unsubscribe...

All campaign emails to contacts must include an Unsubscribe option.

1. 'Unsubscribing' is an automated function that Bizazz takes care of whenever a contact clicks on the Unsubscribe link.
2. The *On Unsubscribe Remove All/Just This* setting instructs Bizazz to remove a contact:
  - from *all* campaigns associated with this website ('remove all'), or
  - from *this campaign only* ('just this').
3. It does not remove the contact from the database altogether. Usually a contact only asks not to receive certain emails (a specific campaign or campaigns). Removing them from the database would create problems for logging in, back orders, existing-customer discounts etc. To delete a contact completely at their request, see Section 12.2.5.
4. When you create a campaign email, include an Unsubscribe link by adding this line of code to the end of the html section:

```
<a href="https://yourwebsite.com.au/index.php?biz-req=unsubscribe">I do not wish to receive any more emails from Your Business Name</a></p>
```

#### 15.2.2.4 Active Period

*Active Period* (manual campaigns only) shows the date period within which this campaign operates.

*Start date* is a required field: the date on which the campaign *will* start or the date on which the campaign *did* start.

*End date* is optional. If you leave the end date box blank, the campaign will keep running until you render it inactive or add an end date.

#### 15.2.2.5 View Steps/View Contacts

1. The Campaign Details page currently shows you either the *contacts* or the *steps* associated with this campaign.
2. Click on one of the buttons under the menu tabs at top left of the grey area, to show the other option.
3. Step information is summarised in a table:
  - step number
  - cycle
  - wait
  - action
  - then...
  - step description. (Section 15.5.1)

To edit a step in this campaign, click on the step number. (Section 15.5.1)

4. Contact information for all contacts in this campaign is summarised in a table:
  - name
  - email address
  - date subscribed
  - [currently] subscribed (yes/no)
  - last step number actioned.

To change the contacts for this campaign, click on *Add Contacts* or *Remove Contacts*. (Section 15.4)

## 15.3 Add/Edit Campaign

### 15.3.1 Overview

1. *First* plan the whole campaign structure. (Chapter 13)
2. Name a new campaign. (Section 15.3.2)
3. Build/edit and connect all the necessary forms and campaign items. (Chapter 14, Section 15.6)
4. Define or modify which contacts are impacted by this campaign. (Section 15.4)
5. Build all campaign steps. (Section 15.5.1)
6. Automatic campaigns:
  - a) Set up the events that trigger each campaign step into action. (Section 15.8)
  - b) When the whole campaign is set up:
    - i. publish any webpage which has a new/revised online form on it (Section 4.7), and
    - ii. test as much of the campaign as possible.
7. Manual campaigns: remember to set the campaign into action on the desired date. (Section 15.7)
8. Contact SuttonNet. Your website needs a scheduled task setting on the web server to run its campaigns. Even if you have other campaigns already running, the setting might need to be adjusted for a new/modified campaign.

### 15.3.2 Create Campaign

1. Go to 'Campaigns – Select Campaign'.
2. Click on 'Add Campaign' at top left of the grey area.
3. You are now on the Campaign Details page.
4. The fields are explained in Section 15.2.
5. Give your campaign:
  - a short, meaningful and unique *name*, and
  - a *description* to identify its purpose.

These are used by you and other Bizazz users, including SuttonNet.

6. ID is automatically generated by Bizazz.
7. Click on 'Update Campaign'.
8. Go to Section 15.3.3.

### 15.3.3 New Campaign Connections

1. Forms:
  - a) Create a form with all the necessary fields to collect and group the data you need. (Section 14.4.2)
  - b) Connect the form to the campaign, by creating an event. (Section 15.8)
  - c) Insert the form on a draft webpage (Section 5.1.7). Save the draft (Section 4.5.4.4).
2. Create the emails, newsletters, SMS's, response webpages etc which will be used by the campaign:
  - a) Create response webpages as non menu pages, via the content management system (Section 5.1.7 Section 4.6, Section 4.3.4).
  - b) Create each email/newsletter/SMS via 'Campaigns – Campaign Items – Add Item'. (Section 15.6)
  - c) Connect each item to a step in this campaign via the 'Campaign – Add Step' button. (Section 15.5.1)
3. When your campaign is ready for final testing, publish the draft webpage and test the campaign by submitting the form. (Section 4.7)

### 15.3.4 Edit Campaign

#### 15.3.4.1 Overview

1. Do not change operational settings for a standard campaign (Section 13.5.3.1). You can edit its campaign items.
2. Never edit an invoice campaign.
3. To edit campaign operational and name details: see Section 15.3.4.2.
4. To add or delete campaign steps: see Section 15.5.1, Section 15.5.4.
5. To edit campaign steps: see Section 15.5.1.
6. To modify the event(s) which trigger it: see Section 15.8.
7. To modify campaign items: see Section 15.6.
8. To modify the choice of contacts targetted: see Section 15.4.
9. To delete a campaign: contact SuttonNet.

### 15.3.4.2 Edit Details

1. Go to ‘Campaigns – Select Campaign’ and select the correct campaign name.
2. From here, you can:
  - edit most details in the grey box (Section 15.3.4.3)
  - add or edit campaign steps. (Section 15.5.1)
3. For more information on these fields: see Section 15.2.

### 15.3.4.3 Fields in Grey Box

See Section 15.2 for more about these fields on each campaign’s Campaign Details page.

1. *Campaign name* and *description* can be edited.
2. *ID* is automatically generated; do not change it.
3. *Operation* can be switched (auto/manual) by SuttonNet or Developer-level hosting clients only.
4. Turn *Status* from ‘active’ to ‘inactive’ to temporarily stop a campaign from running.
5. Switch Status from ‘inactive’ to ‘active’ to reinstate an inactive (suspended) campaign.
6. Switch *On Unsubscribe, remove all/remove just this* as required. (Section 15.2.2.3)
7. You can add or edit the end date to *Active Period*. If the start date is still in the future, you can edit the start date. (relates to manual campaigns only) (Section 15.2.2.4)
8. When you have finished all your changes, click on ‘Update Campaign’ at bottom right of the grey area.

### 15.3.5 Edit Server Settings

For SuttonNet use only.

## 15.4 Campaign Contacts

### 15.4.1 Overview

1. When a contact submits the online form(s) connected to a particular campaign, he/she is automatically added to the contacts list for that campaign.

2. Any contacts who are already in the website contacts database can be added to a campaign, in groups or individually.
  - To add a new contact to a campaign who is not in the general Contacts database: add them to the general Contacts list first, then follow instructions here to connect them to the campaign. Fill in and submit the basic website contact form, or manually add the contact (Chapter 12).
3. Contacts can be removed from a particular campaign without removing them from the website database.
4. To confine certain campaign steps to a selected group of the campaign's contacts, use event filters. (Section 15.8.4)

## 15.4.2 Modify Contacts

To add/remove individuals or groups of contacts from a campaign:

1. On the Campaign Details page, click on 'View Contacts' (left top of grey area, just under the Campaigns tab).
2. Click on either *Add Contacts* or *Remove Contacts*.
3. To add contacts:
  - a) leave all search boxes blank and click on List to display all contacts in the website database; or
  - b) use the filter to display a selection of contacts from the Bizazz database. (Section 4.2.3.3)
    - The first box is for name/part-name searches.
    - The first dropdown box offers contact classifications, if your website uses them (eg Customer, Staff).
    - The second box can restrict the display to Active/Inactive/Validated contacts (Section 12.2.4); or can be left blank to cover all Statuses.
    - When you have set your filter, click on List.
4. Tick a group/individuals or click on 'Select all' as required.
5. Click on 'Add Selected'/'Remove Selected'.
6. Repeat this process as often as you need, to complete adding/removing contacts.

## 15.5 Create/Edit Steps

### 15.5.1 Add Step

Create each step for your campaign and number them to proceed in the right order. Each campaign step has a single campaign item associated with it.

On the Campaign Details page for this campaign:

1. Click on 'Add Step', below the grey area.
2. Insert *Campaign step number*.
  - If this is a new campaign, Bizazz has automatically created an empty step 1. Use this for the first step.
  - If you are inserting an intermediate step, you *first* need to update any following steps' numbers. You cannot have 2 steps in the website system with the same step number.

Eg:

- There are already steps 1,2,3. You want to add a new step 2.
  - Edit steps 2 & 3 to become steps 3 & 4.
  - Next, create step 2.
- If you want 2 actions to happen at once:
    - a) number them as consecutive steps.
    - b) see Section 15.5.3.
  3. Select the *Campaign Item* from the dropdown box.
    - Each campaign step can have only one item associated with it.
    - To use multiple items in one campaign, set up multiple steps.
    - You can select any of the campaign items that have already been created.
    - If you leave Campaign Item blank:
      - nothing is sent out
      - the campaign schedule will simply progress to the next step at the time that you specify.
  4. *Description* tells Bizazz users - including SuttonNet - what the purpose of this campaign step is.
  5. Choose *Cycle by Day/Cycle by Month* to set the interval *unit* of this step.
  6. *Wait for* sets the interval *length* of this step.

Eg: 'Cycle by month, Wait for 2' means that Bizazz will carry out this campaign step every 2 months, starting from the day specified in the next field.

7. Set the campaign step's startup in *Action on Day...*
  - This is specified as a certain number of days after the preceding campaign step.
  - If you want the step to happen on the *same day* as the previous step: put 0 here and see Section 15.5.3.
8. *Then step* specifies which step number comes next.
  - You might think this is obvious; but Bizazz permits multiple 'threads' within a single campaign. Depending on their data, the same campaign for some contacts might go through, say, steps 1, 2, 4; and others, steps 1, 2, 3, 5.
  - Leave 'Then step' blank if this is the *last step* of the campaign.
9. Select either 'receive email from...' (sends an auto email from you to contacts) or 'send email from...' (when a contact has submitted a form on your website).
10. Select the email address you want to use for this step, either sending a bulk mailout or receiving enquiries on the website. To add another email address option: contact SuttonNet.
11. When you have finished all your changes, click on 'Update Campaign' at bottom right of the grey area.

## 15.5.2 Edit Step

1. On each campaign's Details page, either the steps or the contacts are listed below the grey area.
  - If contacts are currently shown, click on 'View Steps' at top left of grey area.
2. Click on a step name in this list, to view and edit the step details.
3. Step number cannot be reset to 1; this step number has a special purpose in Bizazz.
4. When you have finished your changes, click on 'Update Step' at bottom right of the grey area.

## 15.5.3 Concurrent Steps

If you want 2 actions to happen concurrently (eg send an email and an SMS at the same time), treat them as separate steps:

- number them consecutively

- use the same trigger event for each (Section 15.8)
- for the step with lower number: insert the concurrent step's number in 'Then Step'
- for the step with higher number: insert 0 in 'Action on Day...'

### 15.5.4 Delete Step

Contact SuttonNet.

## 15.6 Create/Edit Item

### 15.6.1 Getting Started

1. This section is for creating or editing campaign *emails*, *email newsletters* and *SMS's*. Create/edit *response webpages* as non menu pages in the content management system (Section 5.1.7 Section 4.6, Section 4.3.4).
2. Go to the 'Campaign Items' page.
  - To create a new item, click on 'Add Item'.
  - To edit, click on the item name.
3. The editing window is like the Bizazz cms, but there are some different options and some changed terms.
4. Put the content of your email in the item html area first. If needed, copy it into the text area. (Section 15.6.5, Section 15.6.5.3)
5. To connect a new item to a campaign: see Section 15.6.9.

### 15.6.2 Test Email

Bizazz sends a test version of the campaign email, so that you can check how it looks before inflicting it on your customers. Use this when you create or edit a campaign email.

1. Complete *Test email* with an email address which you have access to.
2. Add this email address to the website's contact list, if you haven't already done so.
  - Make sure that you put it into the right subclassification of contacts, if not all contacts are to receive this campaign email.

- An easy way to add a test contact is to submit the associated online form from your website; use this email address on it. This only works if this campaign is already functioning. If not, use a basic contact form or manually add a contact.
3. Click on ‘Send’ when you are ready to test the campaign item.

### 15.6.3 Name & Type

*Campaign item name* needs to be unique and useful to Bizazz administrators (including SuttonNet).

*Type* is:

- email
- SMS, or
- newsletter.

### 15.6.4 Description

*Description* helps Bizazz users to identify this item on the Campaign Items page.

## 15.6.5 Email/Newsletter Content

### 15.6.5.1 Subject

*Subject* is the email subject line.

### 15.6.5.2 Item HTML

*Item html* produces a formatted email.

1. Prepare the body of your email in the Item html area (or paste in text and images). Remember to:
  - clean content before pasting; and
  - add an Unsubscribe link (Section 15.2.2.3).
2. To generate a *responsive* email layout:
  - a) Go to ‘Insert Snippet – Insert Base Template’.
  - b) Click on ‘Insert’.
  - c) Add content.

3. To generate a newsletter in a preset layout:
    - a) The newsletter template is prepared in advance by SuttonNet. Contact us if you want a template built.
    - b) Go to 'Insert Snippet – Insert Newsletter'.
    - c) Click on 'Insert'.
    - d) Add content.
  4. *Insert block grid* sets up equally sized columns. It works on all email software.
  5. *Insert grid columns* is less reliable across different email packages. It allows columns of different width.
  6. *Insert panel grid columns* is for subdividing panels and columns.
  7. *Insert Snippet – Add button* creates a button for a link.
    - a) Type text.
    - b) Create a link via the link icon.
    - c) Highlight it and go to 'Insert Snippet – Add button'.
- Or:
- a) Create a button area via 'Insert Snippet – Add button'.
  - b) Type text into it.
  - c) Highlight it and create the link.

### 15.6.5.3 Text

Some email software will not accept html formatted emails. *Text* produces plain text for an email. It creates an readable alternative for any contacts whose email software rejects formatted emails.

This is rare in modern email programs. Use it if you think it's still needed by your customer base.

- Copy and paste the complete text of your item html here.
- Make sure that any later edits get copied into the plain text area too.
- Your browser will automatically remove the formatting.
- Each contact's email software will automatically select the email format it prefers.

### 15.6.6 SMS Content

Facility not yet available

## 15.6.7 HTML Variables

### 15.6.7.1 Insert Variable

In the html text area, this icon inserts variable content dynamically into an email. The variable relates to fields in the online form which this email responds to.

Click on the place within the email where you want this content to appear.

Click on 'Insert Variable' and select the appropriate element name from the drop-down list. It displays on this page inside curly brackets {}, but as normal text in the actual email.

(i) For an *email to the website administrator*: usually you will want to email contents of the submitted form. A simple layout is:

1. Type into the html area the label of the form fields in order, followed by ': ' (full colon then a space), one label per line (separated by Enter).
2. At end of each line, after the colon + space, select the corresponding element via 'Insert Variable'.

The html area will look like this:

First name: {=first\_name}

Last name: {=last\_name}

The email, when you test it, will read like this:

First name: Joe

Last name: Muggins

3. There may be fields in the online form which are needed by the database but not by you (or not immediately, for this campaign item). These needn't be included here
4. Add/edit text content around the variables as needed, eg instructions to staff for followup action.

Eg:

{=first\_name} {=last\_name} has contacted us via the website's Personal Interview Request form.

Email: {=email\_address}

Phone: {=phone}

Request: {=comment}

Please contact {=first\_name} within the next 24 hours.

(ii) Insert Variable can also be used for an *email to contacts*: eg Hi {first\_name},

### 15.6.7.2 Insert Variable Test

1. *Insert variable test* allows conditional content in the email, depending on the answers supplied on the online form.
2. Tests can only be applied to fields with a limited selection of possible answers (dropdown boxes, radio sets, checkboxes).
3. A variable test works along the lines of: ‘if the contact answered X in the field Y, then insert this content in the email:...’  
Eg: If Yes in the field, ‘Do you want to pay by bank transfer?’ then insert: You have opted to pay by bank transfer. Bank details for direct deposit: etc.
4. Contact SuttonNet to have a variable test inserted.

### 15.6.8 Save/Update Campaign Item

To create the new campaign item/save your changes: click on ‘Update Item’ at bottom right of the grey area.

### 15.6.9 Connect Item to Campaign

To attach the saved item to the right campaign (step):

1. Go to that campaign’s Details page.
  - a) Select this item from the dropdown list of campaign items.
  - b) Click on ‘Update’.
2. See Section 15.5.1.

### 15.6.10 Campaigns Table

The Edit Campaign Item page lists all campaigns which currently use this campaign item. This table is automatically generated.

## 15.7 Action

1. ‘Campaigns – Action’ in the main menu is used to set off manual campaigns and to stop them.
2. Listed here are all the campaigns which are:
  - manually controlled (Section 13.5.4) and

- active (Section 13.5.5).
3. The search filter is rarely needed. Only the very largest websites would have many manually operated campaigns, due to the high [human] workload.
  4. To set a manual campaign going: go to the row for the campaign you want. Click on *Release* in the last column.
    - Release changes to *Hold*.
    - As soon as the campaign is completed, Hold changes back to Release, ready for the next time that you run the campaign.
  5. The campaign is now ready to run; but if it has a campaign start date (Section 15.2.2.4) that is still in the future, it will wait until that date.
  6. To stop a running campaign *before* it finishes (eg you notice an error in the email content): go to the row for the campaign you want and click on *Hold* in the last column.

## 15.8 Create/Edit Events

### 15.8.1 Getting Started

1. Before creating an event: first set up the relevant object (form), campaign and campaign items.
2. Go to Configuration – Events in the main Bizazz menu.
3. You are now on the ‘Select Event’ page. It shows a table of events set up for this website.
4. From here, you can:
  - edit events (Section 15.8.3)
  - add events. (Section 15.8.2)
5. Each row corresponds to an event. Each event connects one *object* (form: Column 1) with one *campaign* (column 2). On the Event Details page, you will see that the event is also associated with a specific *step number* for that campaign.
6. Click on the Object Name, to find out more about an event’s settings or to edit them (Event Details page).
7. The last column in the Events table (*Values*) shows any element values or classifications which restrict when the event occurs: ie event filters.

- If the Values column is empty, the campaign goes ahead whenever the form in Column 1 is submitted, no matter what information a site visitor puts into their form.
  - If a form has no dropdown/radio/check boxes, then the associated campaign is always triggered when the form is submitted. (There are no possible event filters.)
8. There is a search function on this page, designed for websites which use forms and campaigns extensively. Don't get *search filters* (Section 4.2.3.3) confused with *event filters*.

## 15.8.2 Add Event

1. Click on Configuration – Events in the main Bizazz menu.
2. Click on 'Add Event' at top left of the grey area.
3. Select the correct form and campaign from the dropdown boxes.
4. Set the campaign step number (do not use 1).
5. Click on 'Update Event'.
6. If you only want this campaign step to happen in limited circumstances, you need to specify event filters (Section 15.8.4).

## 15.8.3 Edit Event

1. Go to Configuration - Events and select an event, by clicking on the object name. Use the search facility if needed.
2. You are now on the Event Details page for this event. You can change:
  - the choice of form which is part of this event
  - the choice of connected campaign
  - the relevant step number within that campaign
  - event filters. (Section 15.8.4)

Click on 'Update Event' to save your changes.

## 15.8.4 Event Filters

### 15.8.4.1 Getting Started

1. Go to the Configuration – Events – Event Details page to set or edit *event filter* settings.

2. The last column in the Events table (Values) shows event filters currently set for each event.
3. Event filters work via values that a contact might choose for particular fields, when they submit the relevant form on the website. These can be attribute values (Section 14.5.2, Section 14.3.5), classifications (Section 3.3) or (rarely) html code. The filters restrict which contacts are targetted by the campaign step related to this event.
4. These values are selected from a field that uses dropdown boxes, radio buttons or similar; ie the choice of answers for the relevant field is restricted.
5. It's possible to trigger the campaign step only if a contact passes through multiple filters (meets all conditions). See Section 15.8.4.4.

#### 15.8.4.2 Modify Event Filters

To add, delete or change event filters for a particular event:

1. Go to the event's Details page to edit event filter settings (below the grey area).
2. Bizazz displays one of two things:
  - a) all the fields that can be used filtering and all potential answers (values) to those fields, for the form connected to this event; *or*
  - b) when 'show all values' at top left of grey area is ticked: all possible values for filtering on this website. Sometimes there are other options which are not part of the selected form. This mostly concerns complex setups where a contact submits several related forms over time (eg training, various submissions from login contacts).
3. If you change the form selection, the values/classifications/source code shown under (a) will change.
4. Event filter options are grouped as values, classifications (Section 3.3) and value source codes. Applying or editing the filters works the same way, regardless of how Bizazz classes them.
5. Code filters are generally for SuttonNet use only.
6. Any or all of the possible answers can be used to define filters for this event.
7. To create event filters: tick the box beside each answer that you want, for the contact to be included in this campaign step. All the ticked answers are event filters.
8. Tick as many of the answers (attribute values, classifications) as you want.
9. To remove an event filter: untick the box beside the value you no longer want as a filter.
10. Click on 'Update Event'.

### 15.8.4.3 More About Filters

1. Event filters on mandatory form fields filter *all* contacts.
2. Event filters on non essential form fields filter only the contacts who answer that question.
3. If only one row in the Event Details page has ticks: all contacts who submit this form and select *any one* of the ticked values for that field, will be targetted by this campaign step.
4. If a row is ticked and *all* of its answers are: simply answering the question on the form ensures that the campaign step occurs for this contact.
  - This is only useful for *non essential* form fields. If a field is mandatory, there is no point in selecting all of its answers as event filters; it would not filter out any contacts at all.
5. Ticks along the same row are treated as 'either A or B or...'; ticks on different rows mean 'X and Y and...'. See Section 15.8.4.4.

### 15.8.4.4 Multiple Row Filters

There are 2 scenarios:

1. More than one row's conditions need to be met for the campaign step to go ahead (eg only if the contact is male *and* lives in Victoria):
  - Tick multiple rows of values/classifications within the same event filter.
2. If conditions on any one of several fields or classifications are met, the campaign step goes ahead (eg if contact is male *or* Victorian *or* has bought products online previously via this website):
  - Create multiple, separate events with their own event filters. Each event uses the same object, campaign and step number.

Eg: 'Values State = Vic, Gender = M' is an event filter within a single event. The campaign step is only triggered if a person who is a Vic resident *and* male has submitted this form.

Alternatively, to trigger the campaign step if a Vic resident *or* a male submits the form:

- Create 2 separate events;
- Use the same object and campaign;
- One event has event filter State = Vic, one has event filter Gender = M.

## 15.9 SMS Campaigns

SMS campaign items: proposed facility for Bizazz, to be added when a client requests it.

To use an SMS campaign:

- subscribe to a SMS provider. Your SMS account is managed by you. Keep your payments up to date.
- create and maintain SMS content as campaign items in Bizazz.



# 16 Ecommerce

## 16.1 Sales

### 16.1.1 Order Process

The Bizazz ecommerce system works like this:

1. Customer orders a product online (and might pay for it simultaneously, online)
2. Bizazz records the order, as a uniquely numbered quote or invoice (depending how the online business operates)
3. Customer receives an auto-emailed invoice
4. Website owner/staff member receives an auto email with details of the order
5. They log into Bizazz and click on the order number to update the records there when:
  - an offline payment is received
  - the order is processed, or
  - order details need amending.

SuttonNet customises each website's Bizazz ecommerce to suit the client's business, eg:

- payment options
- online forms tailored for downloadable products or for services (which have no shipping costs)
- product layout on webpages (??).

We also design fully customised ecommerce systems, often building upon the Bizazz software.

### 16.1.2 Select Sales Page

#### 16.1.2.1 Introduction

Click on 'Commerce - Sales' in the Bizazz main menu to view all ecommerce sales/orders:

- A search + list function (Section 16.1.2.2, Section 4.2.3.3). If you can't find the sale that you need, check this is set correctly;
- 'Up Level' button at right returns to the main menu;
- First column lists each invoice and/or quote.
  - Quotes and invoices may need to be separate entities, depending on your online business model.
  - Click on the contents of a cell to view the order details.

### 16.1.2.2 Sales Search Function

Search filter options are:

1. All activity (all orders, whether processed or unprocessed, paid in full or to be paid)
2. Quotes and Invoices
3. Quotes only (orders which have not yet been paid for)
4. Invoices only (orders which have been paid for)
5. Unprocessed Invoices (orders which have been paid for but goods have not yet been sent), or Unprocessed Invoices (orders which have not been paid for, or not had payment cleared if you use manual credit card processing). See Section 16.1.3.2.

Select the option you want and click on 'List' to display all relevant items.

### 16.1.2.3 Other Columns

*Date* is useful for finding an order and for matching payments with orders. Click on the column heading to reverse order of dates (ascending/descending).

*Name* is name of the person being billed.

*Payment type* (credit card type, direct deposit etc) is as selected by the customer.

- Payment options are chosen by the website owner, during ecommerce design.
- Contact SuttonNet to add or remove payment options.

Total *amount* of the order is next.

*Shipping To* shows the delivery postcode/country.

## 16.1.3 Order Details

### 16.1.3.1 Getting There

Click on the order/invoice/quote name or number in the first column of the Select Sales page.

This takes you to 'Select Sales - Sale Details'.

### 16.1.3.2 Sale Details Page

1. *Mark invoice as NOT processed*: this option adds this invoice to the list of unprocessed invoices.
  - You can list all Unprocessed Invoices via the Search function, then work through orders methodically.
  - Unprocessed can mean either unpaid, or not yet packed and despatched. It is up to you how you use this.
2. *Customer* details are as provided on the ecommerce online form.
  - An ecommerce customer is the payer (*billing* name and email address), not necessarily the recipient of the goods (*delivery* name and address).
3. *Payment* details:
  - are entered automatically from the order form for online payments
  - are entered manually for offline payments.
  - date and amount of payment received can be edited, for offline payments and cancelled or corrected credit card payments.
  - for security reasons, credit card numbers and CCVs are not displayed or retained by Bizazz.
4. *Despatch* helps keep track of order processing. Once an order has been processed:
  - Click on Edit.
  - In the popup Despatch dialog, tick the box next to date.
  - Bizazz will automatically record time and date of despatch. The default despatch time/date in Bizazz is time/date when the box was ticked.
  - You can adjust the despatch time/date manually, if you need to be more accurate.
  - Click 'Update'.

5. *Invoice* shows:
  - for each product ordered: code, item, unit cost, quantity, GST and total price
  - for the whole order: total, total paid and balance.
6. *Send invoice to* shows the email address to which the invoice was emailed.
  - This can be edited (eg if the original email bounces and you phone the customer for another email address).
  - ‘Send’ button next to this email address emails a copy of the invoice to the customer. See Section 16.4.2.

## 16.2 Export Sales

Go to ‘Commerce - Export’ to export all online sales, or just the unprocessed invoices, to a spreadsheet.

Refine your data by selecting start and/or end dates.

Click on ‘Download CSV’ to produce the spreadsheet.

## 16.3 Postage

### 16.3.1 Introduction

1. This area contains your shipping (postage) rates for all products sold online, displayed in csv format:
  - international and Australian (by postcode) destinations and their cost
  - prices by total package weight
  - any other factors used in calculating shipping costs.
2. The ecommerce system uses these rates along with the *product weight* of each product ordered, to calculate total shipping cost of an online order.
3. Product weights and shipping csv are set up initially as part of website development. They need to be maintained.
4. To update shipping rates on the website: the postage csv is downloaded, edited and the new version uploaded to the site.
5. Contact SuttonNet if your shipping spreadsheet needs revision. It’s a complex spreadsheet that needs to be kept in the same layout. Incorrect editing can corrupt your ecommerce shipping calculations.

6. It is important for your profitability that you package products efficiently, set postage rates and product weights correctly, and maintain them.
  - Australia Post's prices will rise.
  - Relocating your business to a different postcode will affect shipping rates to Australian destinations.
  - Redesigning or repackaging your products can alter the applicable product weights and postage.
  - Very large packages are priced by Australia Post according to volume, not weight.
7. It's your responsibility to stay on top of any shipping rate changes that affect your business.
  - SuttonNet occasionally updates postage for all our ecommerce clients, but not on a regular schedule.
  - We don't guarantee that we will always update your online rates, or alert you, when Australia Post charges change.

## 16.3.2 Postage (Shipping) CSV

### 16.3.2.1 Setting Rates

1. SuttonNet prepares and uploads the postage spreadsheet to your specifications, when we set up your ecommerce.
2. We usually recommend:
  - a) start from Australia Post rates, slightly simplified;
  - b) customise these standard rates if desired. Each client's postage csv is customised to some degree: eg to allow for free shipping within same postcode as vendor;
  - c) keep everything simple. It is easier to maintain;
  - d) cover additional handling and packaging expenses via the cost of each product, rather than in the postage area of Bizazz.
    - This is efficient to maintain;
    - It doesn't shock buyers with big shipping charges;
    - It avoids advertising misleading prices and so falling foul of consumer law.
3. The ecommerce system calculates shipping from *the business location given to SuttonNet* when the ecommerce system was set up.

- If you change business (despatch) address, let SuttonNet know.
  - We might need to alter the postage settings. We will also need to update the website's contact details in places that a client can't access - eg the webpage header/footer areas, invoice.
4. Bizazz can handle a range of shipping options with associated price adjustments: eg with or without insurance, standard/express post.
  5. Shipping charges for some other delivery methods are possible too, eg free for customer pickup, a set fee for local dropoff.
  6. We do not recommend courier services for ecommerce:
    - Couriers do not deliver door-to-door in all areas, although some may claim that they do.
    - Some do not advertise prices for all destinations. This makes it impossible to set up an ecommerce system based on their pricing.
    - A courier can refuse to deliver to some locations, or advertise POA, but online sales can't work that way.
  7. If you want to create your own shipping rates, and not use Australia Post's as the basis:
    - make sure that you cover your costs
    - it is easy to miss a block of postcodes, countries or parcel sizes
    - SuttonNet needs to format the postage spreadsheet for you, so that the Bizazz software reads it correctly.

### 16.3.2.2 Packaging

1. The rates in the standard Bizazz postal csv do not include Australia Post satchel or other packaging. If you prefer to utilise the 'postage with satchel' pricelist, contact SuttonNet.
2. Otherwise, factor your packaging costs into product prices/product weights.

### 16.3.2.3 Australia Post Rates

1. Australia Post charges can be difficult to understand or get full information on. Sometimes readily available official documents are incomplete. Don't rely on what you find online. Contact your post office for a hard copy summary of current rates.
2. Australia Post rates depend on:
  - a) destination postcode in Australia, or destination country; and
  - b) parcel weight – or for very large parcels, their size/shape (cubic weight).

#### **16.3.2.4 Postage CSV**

Your ecommerce postage rates are stored in Bizazz as a csv file. To view this file:

1. In the Bizazz main menu, select 'Commerce – Postage'. This opens the Update Postage Rates page.
2. Click on 'Download CSV'.

Usually, a postage csv contains:

- zone codes for destination countries
- zone codes for Australian postcode groups
- Australia Post prices for various parcel weights posted from your business location to each zone
- prices of international parcels over 10kg averaged, not exact Australia Post charges.

Contact SuttonNet if changes are needed; it is easy to corrupt the spreadsheet if you DIY.

#### **16.3.2.5 Update Postage CSV**

for SuttonNet use only, except for a few nominated clients

#### **16.3.2.6 Location Based Rates**

For SuttonNet use only

#### **16.3.2.7 SuttonNet Updates to Postage CSVs: Procedure**

For SuttonNet use only

#### **16.3.2.8 Refresh from CSV**

For SuttonNet use only

## **16.4 Managing Ecommerce**

### **16.4.1 Security**

1. SuttonNet expects ecommerce clients to:

- use a security certificate on your website. This is software that encrypts website data such as credit card numbers in transit from online customer to web server.
    - From November 2018, SuttonNet *requires all new websites/newly hosted websites* to maintain a valid security certificate, minimum DV level
    - We *require all ecommerce websites* that we host to maintain a valid security certificate
    - We *recommend* that ecommerce websites use an EV certificate, for added assurance to online customers;
  - take due care of any software keys and login details supplied by us and used for accessing credit card data. This includes malware protection for relevant work computers;
  - keep abreast of laws that affect your online business;
  - advertise products honestly;
  - supply goods of merchandisable quality.
2. We reserve the right to refuse service if we consider a website is/would be misleading to customers or in contravention of any law, regardless of whether we would incur a personal or business liability.

### 16.4.2 Processing Orders

Keep records up to date:

- check emails frequently for new orders or customer enquiries
- contact SuttonNet if online order notifications need to go to a different email address
- keep track of unprocessed orders
- enter payment details for offline payments promptly
- tick despatch date/time as part of your packaging and despatch routine.

Some websites use offline payment options or manual credit card checking. The sales process is different from online payment, where payment is assumed to have been cleared immediately. Goods are not packed and shipped until payment is received, or until the credit card payment has been cleared.

Note: Bizazz stocktake (if used) is auto-updated (??) after an invoice is issued.

## 16.5 Payments

### 16.5.1 Overview

1. Range of payment methods for online sales is up to the merchant.
2. Payment options can be altered by SuttonNet on the client's request; fee applies at hourly programming rates.
3. Payments for ecommerce products can be online or offline.

### 16.5.2 Online Payments

Credit card payments are common but not obligatory for ecommerce.

1. Online payment options are convenient for online customers; they can order and pay in one session.
2. From the merchant's viewpoint, the online purchase is completed and there are no unpaid orders hanging, that might be abandoned.
3. Credit card payment requires a merchant account with a bank or online payment gateway specialist. A business that also has non ecommerce sales might need a bank merchant account anyway.
4. Online payment platforms such as Paypal, eWAY etc vary in their fee structure. Which one is best depends on your business: eg monthly sales totals, product prices.
5. There is a risk of a credit card chargeback after goods have been shipped. This can happen because of a disputed transaction (stolen card) or customer dishonesty.
6. Ecommerce credit card transactions can be processed manually, ie delay payment until the transaction has been approved and the order's source checked manually. This gives the merchant control over accepting orders. You can delete any that seem dubious.

#### 16.5.2.1 Credit Card Payments

It is the merchant's choice which credit cards to accept and whether to apply a surcharge for credit card payments.

- Bizazz ecommerce allows different percentage surcharges on different credit card brands. Surcharge facilities and values are inserted or edited by SuttonNet.
- If credit card is the *only* payment option, do not add a credit card surcharge; this is misleading advertising of the price of goods.

- A credit card surcharge can legally only recoup the actual cost of the credit card provider's charges to you, not extras like your time in processing the payment.
- Consult Department of Fair Trading or similar government websites in your State or Territory for more information.

### 16.5.2.2

## 16.5.3 Troubleshooting

### 16.5.3.1 What To Do

Sometimes you can help a customer out by walking them through the order process or even doing it for them.

If not: SuttonNet can often trace server logs to see what has happened and how to fix it.

Daily server logs are usually kept for only 3-4 days, so contact us fast if you think there is a problem. It's better to ring out of hours than to delay.

*Your ecommerce records in Bizazz don't seem right (eg 2 consecutive orders for same amount & products from the same customer; or perhaps a shipping total is not as you expected):* contact SuttonNet.

*You lose an order:* contact SuttonNet. We can retrieve deleted orders from the server logs.

*You get a call from a customer, saying that they can't get their ecommerce order to work:* complete the order if you can,. Process their payment and get the goods despatched. Along the way, collect information that will help identify any problem with the website.

1. Ascertain where they got up to in the order process and what they have found difficult.
2. Ask for details of their order:
  - quote/invoice number, if one was issued
  - exactly what the customer did
  - at what point the process failed
  - any message that came up on their screen
  - what browser they were using, and (if they know) whether it is a very recent or very old version

- identifying details to trace the order: eg time (watch out for different time zones), name, location, email address, products ordered, shipping option
  - payment type.
3. Check Bizazz - Sales to see if the order is recorded there.
  4. If no order has appeared in Bizazz, you can:
    - ask them to start again, and walk them through the order process, or
    - while on the phone, order online for them. This works better for some customers.
  5. If you can't set things straight, *contact SuttonNet asap*.
  6. Even if the order is now completed and you have a happy customer, contact us immediately:
    - if you want to improve your ecommerce text, processes or layout, to make it easier, or
    - if you think there might be website errors.

### 16.5.3.2 What Can Go Wrong?

All sorts of things.

The customer could have poor vision or be having a bad day.

No one can predict every mental path that a site visitor might take. An overtaxed system can then process their order wrongly.

Here's some scenarios:

- customer abandons the payment process partway through, deliberately or not
- payment doesn't go through when it should, or does go through while a customer is trying to cancel or amend their order
- a shaking hand hits a button twice
- online connection to a bank is temporarily unavailable (drops out)
- Internet connection fails mid-order
- you accidentally delete an order
- an old browser can't display the website properly.

Sometimes customers expose a bug in SuttonNet's software and we need to fix it.