

Contentful user guide/training

Changelog

Date	Comments/Author
5/19/23	Added section on how to add video - Lynette
5/19/23	Added guidance on moving articles to a different parent topic - Cam
5/12/23	Added section on target audiences - Denise

Contentful is the tool we use to create Help Center content. This guide walks you through basic concepts and steps required to create and publish Help Center content. Contact Denise for additional support.

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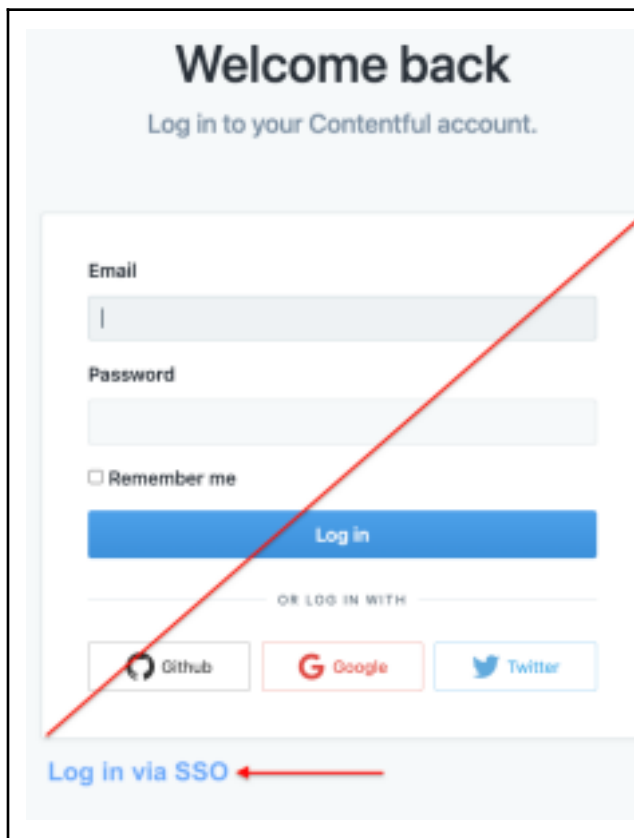
[Delete or archive an entry](#)

New [Create and insert text variations](#)

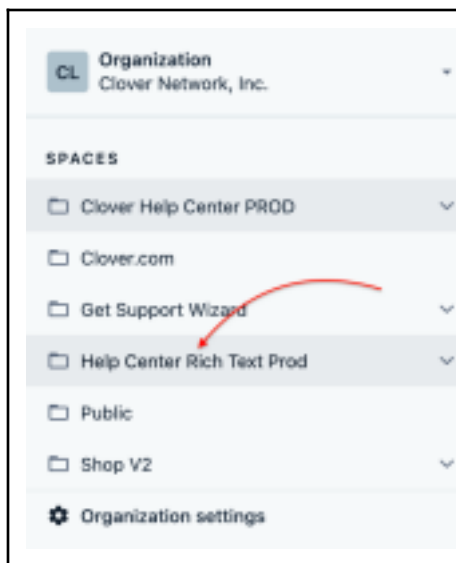
[Hacks and tips](#)

Log in and select a space

1. Sign in to Contentful via SSO. SSO is **clover**; then enter your LDAP credentials and Authenticator code. *Do not use email and password; it doesn't work.*



2. At the top left, select **Help Center Rich Text Prod.** (The screenshot below probably displays more spaces than what you'll see.)



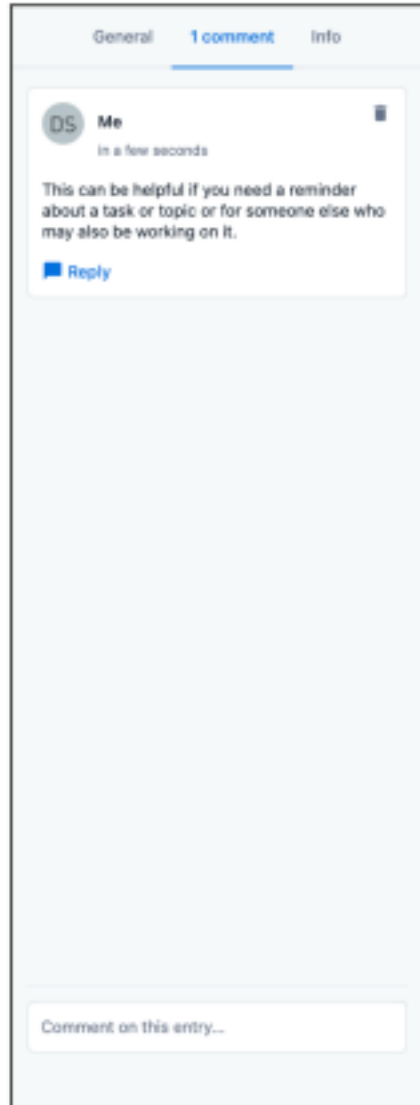
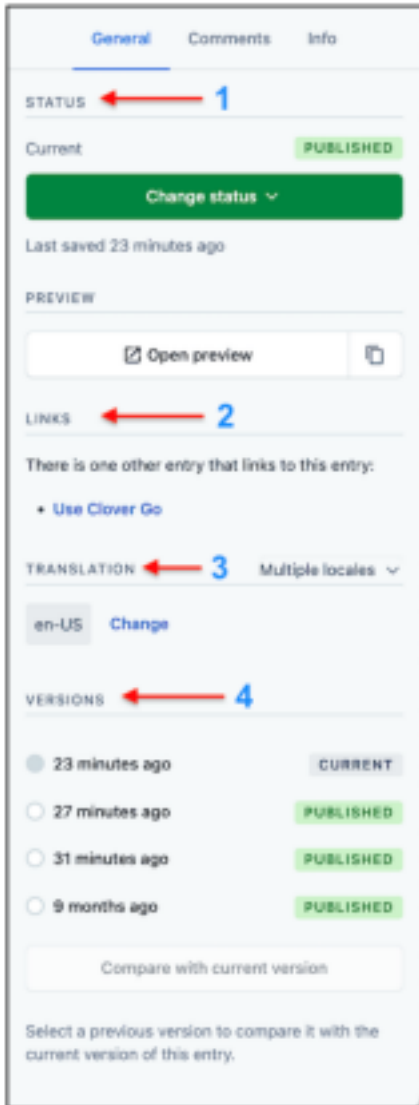
Get familiar with the navigation bar

Top nav is used a fairly frequently, so take a few minutes to get familiar with it.



1. **Workspace.** Select a space (for us it is **Help Center Rich Text Prod**)
2. **Home.** Home page supplied by Contentful (not used).
3. **Content Model.** Name and description of all content types (used by eng).
4. **Content.** Displays a list of content, content type, updated date, updated by, status, and column display. When selected, Search appears below the nav.
5. **Media.** Where images are uploaded and stored.
6. **Apps.** Unused.
7. **Settings.** Info about environment, users, permissions, etc.

Right navigation options



General Comment Info

1. Status - Published, Unpublished, Scheduled

2. Links - Displays associated task, topic, or route. Click to move up one level.

3. Translation - Show content in selected regions.

4. Versions - Total number of versions. Compare with previous versions and revert (if need.)

Add comments about the content. • Content type

• Contentful internal ID

• Version info

• Author (doesn't reflect/update author correctly)

Create content

Everything in the Help Center is created using one of two content types:

- **Topic.** Topics can have sub-topics, but they're still called topics.
- **Task.** Tasks include step-by-step instructions and live under topics

About topics and tasks

Following is an example of a simple topic and a task within it.

Topic: PopPay. Brief introduction, no more than 2-3 sentences.

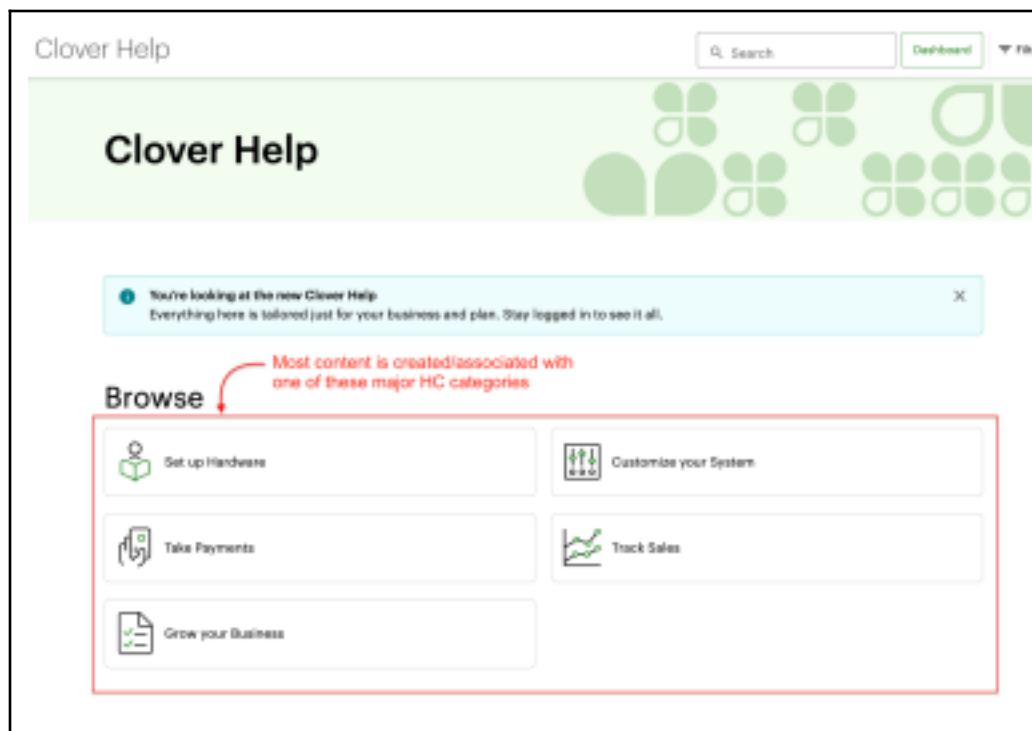
Task: Download the PopPay app - numbered instructions.

- **Topics** are created under one of the major categories (also topics) and possibly nested under other topics in that category.
- **Tasks** are nested within/under topics.

The easiest way to figure out where to add the topic or task is to log in to the Help Center and navigate from a category to where the topic fits.

Example:

You're adding a new way to take a payment - it'll go somewhere under **Take Payments**. (Home screen logged-in view below.)



About routes

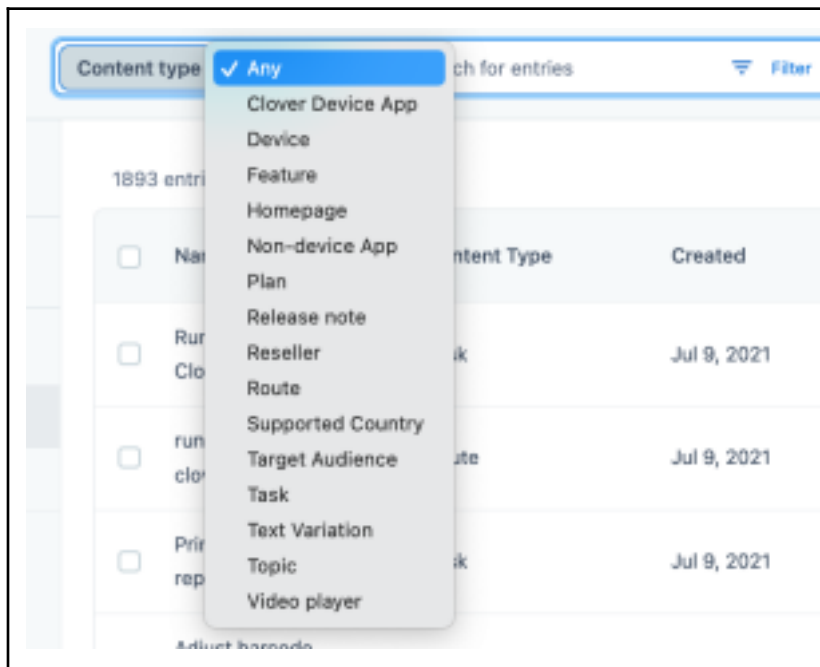
All topics and tasks require a unique *route*; it's the way people get to the content (part of the URL). In Contentful, routes are called *slugs*. You may also hear the term *permalink* - they're all the same thing. Route name is lowercase, separated by hyphens, and should relate to the subject. Every route must be unique.

`route-name-related-to-content`

Find content

To find the category (topic) where a new topic or task goes, use the Search field.

1. In Contentful, select the Content tab. The Search field appears.



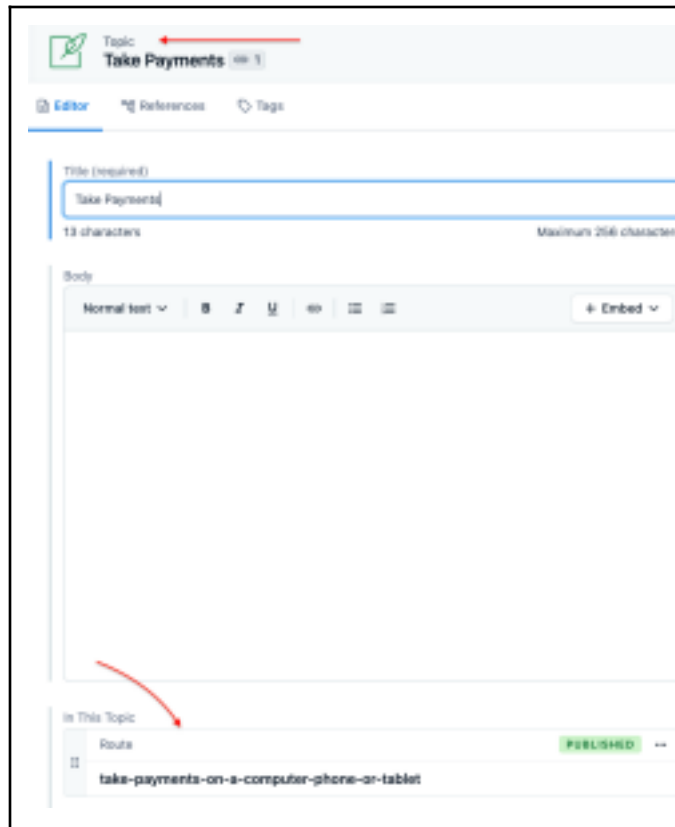
2. Do either of the following:

- If you know what content type you're searching for, you can select it from the list to get a smaller set of results, and then enter the string you're looking for.
- Leave the selection as **Any** if you're not sure of the string you're looking for.

Note: An explanation of all Contentful search parameters and options is [available here](#).

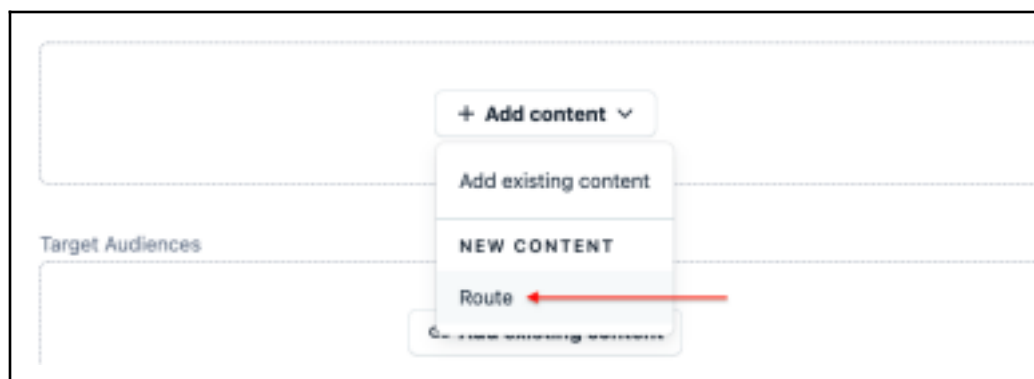
3. Find the **Take Payments** topic and open it.
4. Check to be sure you're in the right place. (Content type **Topic**, **Take Payments**).

5. Next, scroll to and open **take-payments-on-a-computer-phone-or-tablet** in the list. (Sub-topic of Take Payments).



Add a route & topic

1. Scroll to the bottom of the **Take payments on a computer, phone, or tablet** topic and select **Add content > Route**.



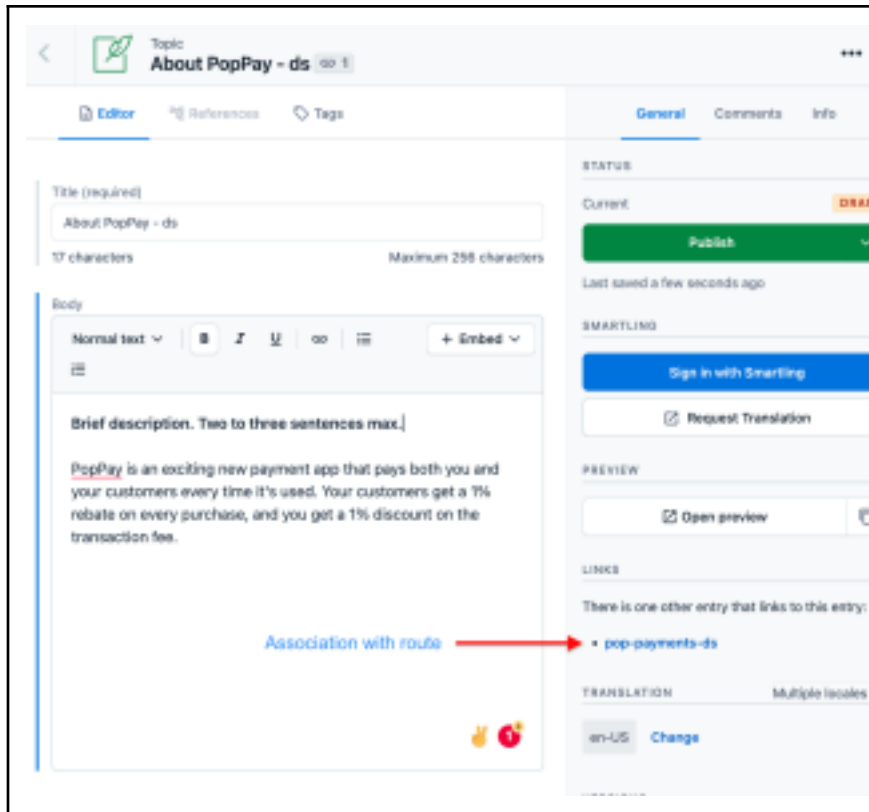
2. Enter the route name (for training, we'll use fictitious **pop-payments-your-initials**. Every route must be unique.
3. Under Limited Audience, select **Yes**.

Note: **Limited Audience** means that that topic (or task) is **not searchable** via Clover or

Google, but IS browseable if it's linked to a topic in the Help Center.

In rare cases, if you must hide it from being browseable, create or move it outside of the Rich Text space. [Learn how to do this](#) in the Cracker Hacks section.

4. In the Entry area, select **Add Content > Topic**.
5. Add the title **About PopPay-yourinitials**.
6. Enter a brief description (for topics, 2-3 sentences max).



New - About target audiences (tags)

The Target Audience, or *tag* you assign to a topic or task tells Contentful what and where to display Help. This is the way we are able to personalize content.

- **Important:** If you *don't* assign a tag, the content appears in every region. In some cases, this is what you want, for example, everyone in every region has Cloeout and Deposits, so assigning a tag isn't necessary.
- In addition, if you don't assign a tag and also don't submit content for localization, it shows up in every region, in **English**.

Request regions from PM

Always ask the PM what region/s the feature/s are launching in - do this every time there's an update - it's the most overlooked thing, and actually the most important thing. (While it would make sense to look at another article that's part of an overall product and assume you'd use the same tags, that's not always the case.)

Content may have more than one target audience assigned to it, for example, when an app has different features depending on the region where it's available.

Example: Clover Go

- Although Clover Go is available in the US, Canada, UK, and Ireland, Go with *payments* is only available in the US and Canada, and even so, some payment features are only available in the US.
- Clover Go with **Tap to Pay** is only available in the US, so the Tap to Pay with iPhone task has to be tagged with **Clover Go - US** to eliminate it from appearing in Go Canada content.

Clover Go Tap to Pay example:

<https://app.contentful.com/spaces/vygnxxjc374u/entries/1laNczBukDQmJo2MnbZYB1?previousEntries=1mpxMkVxIMFF2ECbpsmrkK>

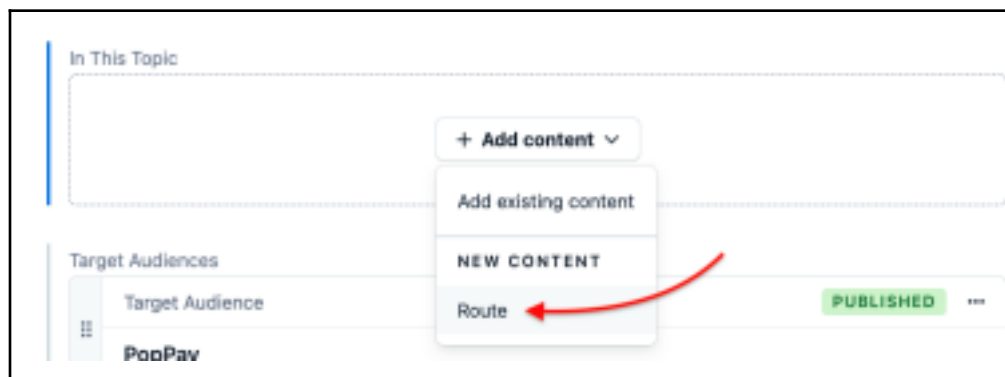
Note: There are currently 56 target audiences, which cover just about everything. You can see all of them, and their attributes, but choosing **Content type** > **Target Audience** in Contentful. (There is no way to export the list of them...)

Create and add a task to a topic

Tasks are used for step-by-step instructions. Next you'll add a task to the **About PopPay** topic.

Adding a task is a lot like adding a topic. Every task must have a route, and must be associated with a topic. (If you don't associate a task with a topic, it has no anchor (isn't part of any larger category or topic), so users can't find it.

1. Find the **About PopPay** topic. (If you need help with this, see [Find content](#).)
2. On the About PopPay topic page, scroll to **In This Topic**.
3. Select **Add Content** > **Route**.



4. In the Slug field, enter the route name **download-poppay-your initials**.

5. Scroll to Entry, and select **Task** from the Add content menu.
6. Add the title **Download PopPay-yourinitials**.
7. Copy/paste the text that follows into the Task window - next, you'll apply formats and add links.

To use PopPay you need:

iOS 11 or higher (bullet)

Android 6 or higher (bullet)

Download PopPay to your mobile phone or tablet from one of the following: App Store (<https://www.apple.com/ios/app-store/>) (bullet, add link URL)

Google Play (https://play.google.com/store?hl=en_US) (bullet, add link URL) Before you take payments (H3)

Open PopPay and log in to your [Clover account](#). (numbered)

Select a color scheme.(numbered)

(Tab, then bullet icon) Dark mode. Displays the app in black and green.

(bullet) Light mode. Display the app in yellow and gray.(bullet)

(Shift-Tab to return to numbered list) Turn on location sharing.(numbered) Select an avatar, which appears on all your receipts (email, SMS, or printed). (numbered) Next, reconcile PopPay transactions.

Recap

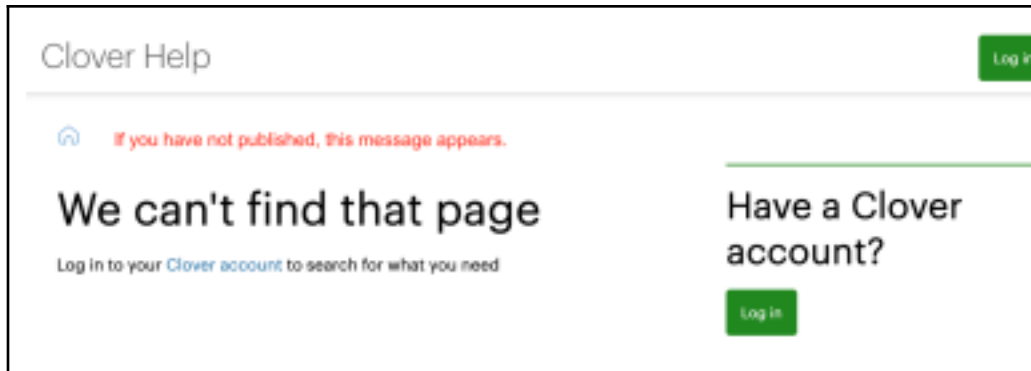
At this point you've:

- Logged in to Contentful
- Looked at work area
- Found an entry
- Created a route
- Created a topic
- Added a brief description to the topic
- Assigned a Target Audience to the topic
- Created and added a task to a topic

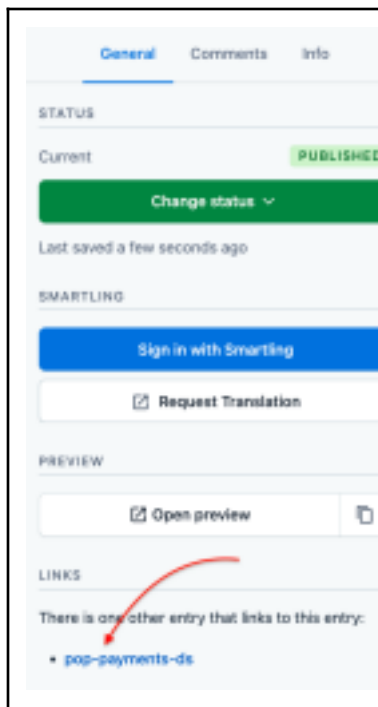
Preview and publish

Selecting **Open preview** displays the *last published* version of content. (Preview in draft not available yet - eng is working on it,)

1. In the **About PopPay** topic window, select **Open preview**. The following message/error appears. Super common error due to not having draft preview - you'll see it if:
 - You have never published the content.
 - The route related to the content hasn't been published.



2. Select **Change status > Publish** to publish the **PopPay** topic.
3. Next, select the route `pop-payments-your-initials` to navigate to the topic's route, and then select **Publish**.



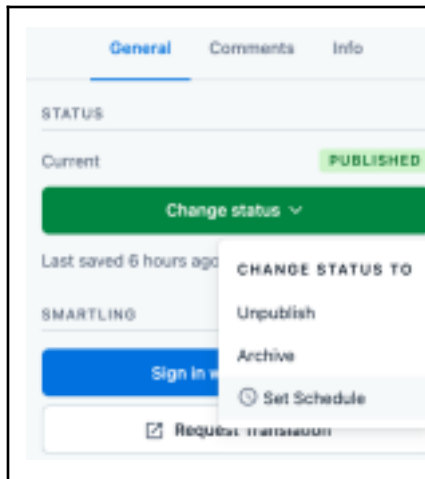
4. Select **Open preview**. The topic previews correctly.

5. **Critical: Select Change status > Unpublish now! Your work is published on the live site.**

Schedule a time to publish

You can schedule a time to publish or unpublish content. You must create a schedule for *both* the route and topic or task you want to publish at a specific time. As a general rule, schedule the route and then the topic or task.

1. Select **Set Schedule** from the Change status menu.



2. Select the date and time you want to publish. You can type in a time or select a pre-defined one from the Time drop-down.
3. Check the time zone; then select **Set Schedule**.

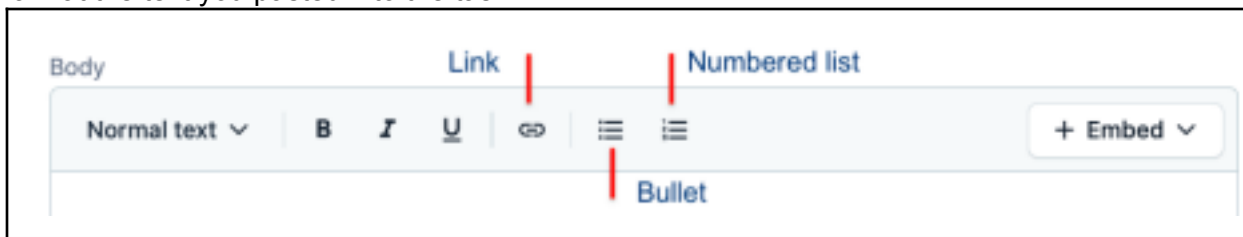
Recap

At this point you've:

- Published a topic and a route
- Identified the reasons preview may not display content
- Previewed content
- Set a schedule for when to publish content

Formatting: Numbered lists and bullets

To use both numbers and bullets in a numbered list, you use a key combination. Use the instructions to format the text you pasted into the task.



Indented bullets in a numbered list

1. Click numbered list in the toolbar to start the list. Press **Return**.
2. Press **Tab** - an indent with the letter "a." appears. Next, click the Bullet icon to turn the "a." into a bullet. Press Return to add more bullets.
3. To return to the numbered format, press Return after the last bullet and then press **Shift-Tab**.

Add an existing task to a topic

You can insert an existing task repeatedly for content reuse. (We rarely do this in the HC - if we're going to reuse something we typically create a single task and then link to it from other tasks.)

A task named Reconcile PopPay transactions was previously created, which you'll find and add to the PopPay topic.

1. In the About PopPay topic, select **Add content > Add existing content**.
2. To find the task, type "reconcile" to find the reconcile PopPay task.
3. Select **Insert 1 entry**. The task appears under the topic.
4. Apply the Target Audience **PopPay**.

Change the order of topics and tasks

To change the order in which tasks and topics appear, drag the six dots at the left.

Add links

You can create an anchor link within the same task via headings (URL), or link one topic or task to another using a route (Entry) .

Note: You *cannot* combine a URL with an anchored link to get from one topic or task to a heading in another topic or task.

Add an anchored link in the same doc

1. Find the **heading** you want to jump *to*. (It has to be a heading.) For training, we'll create a link to the **Before you take payments** heading.
2. Select the text you want to link *from*.
3. Click the Link icon in the toolbar.
4. In the Insert hyperlink dialog box, make sure that Link type is **URL**.
5. In the Link target field, enter a # sign and the exact text (in lowercase) of the heading you want to jump to separated by hyphens. See example below in text and in dialog box.

[#exact-heading-name](#)

[#before-you-take-payments](#)

6. Select **Insert**, publish the doc, and preview to test it.

Link from one topic or task to another

Important: Don't use the URL link type to link from one doc to another. Always use **Entry** (which is the route) as the link type.

1. Select the text you want to link from. At the bottom of the Download PopPay task, select **Reconcile PopPay transactions**.
2. Select the link icon.
3. For Link type, select **Entry**; then click **Select entry**.
4. Find the Reconcile PopPay transactions route and insert it.
5. Publish and preview.

Add images

Contentful supports the following media types: png, jpeg, svg, PDF.

- For screenshots, use png.
- For vector images, use svg.

Notes

- Don't use jpeg, it doesn't render properly, the file size is large, and because we don't add photos (continuous tone images), it's unnecessary.
- Contentful's image editing tools are quite primitive and there is no undo or version control, i.e, if you change something you can't get back to an earlier version.

Upload an image

1. Start by getting the image (PopPay logo) from Denise's drive here: [PopPay](#) (<-- Newish Goog feature gives you the option to replace the long link with a name.)
2. Download the PopPay logo to your desktop and add your initials.
PopPaylogo-*yourinitials*.png.
3. In Contentful, select **Media** in the nav bar.
4. Select **Add Asset > Single asset**.
5. In the Title field, enter a name for the file. (When you search for a file, it's the file name, not the Title.)
6. In the Description field, enter alt text for the screen reader. Example: Jack in the Box toy celebrating the use of PopPay.
7. In the File area, locate and add the PopPaylogo image.

Note: If you click Open File Selector, you can select images/photos from other outside apps (Insta, FB, etc.)

8. Publish the entry.

Insert an image

1. Select Content in the nav bar.
2. Find and open **Reconcile PopPay transactions**.
3. In the toolbar, select **Embed > Asset**.
4. Find the PopPay logo and select it to add it to the task.
5. Publish the task and Preview.

Add video

1. Within a task article, go to **+Embed** and select **Entry**.
 2. Select an existing entry or go to **Create new entry** and select **Video player**.
 3. Name the entry (start with "v-") and add the URL of the video. The URL must be the embed link.
 4. The video player will show up in the entry. Publish the entry.
 5. Publish changes to the article.
 6. Double-check that the video is rendering correctly.
- The embed link can be found when you go to share a video, within the embed code. If Share isn't available on a Vimeo video, the embed pattern for a Vimeo URL is: `vimeo.com/314432` → `player.vimeo.com/video/314432`
 - Don't forget the `https://` when adding the URL
 - Do not embed YouTube links as they will show the YouTube UI/UX (recommended videos, etc).
 - Do not embed a video that is password-protected.
 - If the Vimeo link you're given has unwanted UI elements such as superimposed video title and video owner name, request that the video owner edit the player appearance to strip those details out.

Archive or delete an entry

As a general rule, don't delete any content unless you're 100% certain you'll never need it again. To be on the safe side, **Archive** it.

- If something has never been published, you can delete it in a single step.
- If something has been published, you must unpublish it first, and then you can delete it.
- If you delete a topic, any underlying (connected) topics or tasks won't appear in the HC, but they won't be deleted..

Archive or delete an entry

1. Select Content in the nav bar.
2. Find the entry you want to archive or delete and select the checkbox next to the entry.
3. Select either Unpublish or Delete.

This concludes basic Contentful training. This doc will be updated regularly with new sections, tips, and techniques. Future versions will contain:

- Versioning - how to get an earlier version of a topic or task
- Add videos
- Localization - how to submit for localization

Create and insert text variations

Text variations are used when you want to isolate certain content from specific audiences. They do NOT require a route, but are separate pieces of content that must be created and inserted into existing tasks/articles. These will be used in Dash 3 where the content is completely different than Dash 2. YOU can and can also be used when you want to show

Couple of things:

- Text variations can contain text and graphics.
 - Text variations must be submitted for localization separately, even when they are embedded in a task you're submitting. Each text variation is a separate entity.
 - Text variations are tagged just like tasks or topics.
 - There are currently two tags for text variations in Dash3, but they don't work...Seamus will need to follow up with this for actual dash 3
-
- **Important:** Text variants can't be previewed in dev. You have to go to Help on clover.com to see the entry.

Create a text variation

1. In Contentful, click the Content tab, then select **Add entry**.
2. Select Text Variation.
3. Enter a name (this is internal, has no effect on what's displayed),
4. Enter text/graphic or a combination of both.
5. Enter a target audience (there are no country overrides in text variations, but you can tag with individual countries).
6. Publish the entry.

Tips & hacks

Things you should never do unless you have to. Please use these things sparingly - they should never become accepted processes and procedures.

Make an existing topic and any related tasks disappear from navigation

Concept: Make a topic invisible unless someone has the direct URL. The *only* way to do this is to move it out of the Rich Text space, but keep it available via a URL.

1. Limited audience does not hide a topic/tasks. It only makes it unsearchable.

Note: Anything that should only be visible to a specific audience (like a field test or limited number of viewers not related to service plans) needs either a feature flag or target audience. This is an eng thing - ask the PM about the limitations, then ask Denise, who will get it implemented with eng.

Assuming you don't have a feature flag or a target audience, follow the instructions below to remove it from HC navigation until you do.

2. For an existing topic/tasks that exist with a higher topic.

Move an article from one parent topic to another

Concept: To rearrange or re-nest articles under different parent topics

1. Find the article that you want to re-home.
2. Be sure to note the slug (route) name of the article you want to move.
3. Under the **new** parent topic, scroll to the route(s) listed below *In This Topic* and select the dropdown arrow next to **+ Add content**.
4. Choose **Add existing content** and search for the slug you want to rehome. 5. Add the new slug (route) and republish the parent article (topic).

You did it! (Preview the article to triple check that the article was correctly moved).

Common questions and answers

Q: What's the difference between a target audience and a feature flag?

A: A target audience sets a condition within a CMS (Contentful) so that only the intended audience sees. A feature flag turns a condition in the UI on or off.

See what other users are saying about Contentful

- *I often swim in tar because it makes me feel better about Contentful.* - Anonymous
- *If I'm here I'm already annoyed.* - Anonymous
- *I love this tool, but I consider API documents romance novels.* - Anonymous

Lynette to add:

- How to request translations
- How to create a device in the system