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1. SmartTheme

Welcome to the OptimizePress SmartTheme Manual.

This manual will guide you through setting up your WordPress blog with the SmartTheme, and how to utilize the various features of the theme to build a powerful authority building blog.

Before you get started, please read these important notes:

1. The SmartTheme will replace the previous OptimizePress Theme – this theme is focused on blogging and therefore we recommend switching to the OptimizePress plugin for using our LiveEditor (to build your landing pages, sales pages and other conversion pages).

2. You will need the OptimizePress plugin installed to use Integrations – All integration connections are setup through the OptimizePress plugin. In order to use any of the opt-in form functionality inside the SmartTheme you will need OptimizePress running and licensed on your site.
2. Initial Setup

Follow the steps in this section to get the SmartTheme configured correctly.

- Installing The Theme
- Activating the OptimizePress Plugin
- Setup Integrations Inside OptimizePress
2.1. Installing The Theme

The first thing you need to do is install the SmartTheme on your WordPress website. If you don’t already have WordPress installed on your website, please follow this guide first:

https://codex.wordpress.org/Installing_WordPress

**Step 0: Download the SmartTheme file to your computer**

The first thing you need to do is download the SmartTheme file to your computer. Download this from the members area and save it to a location on your computer where you can find it easily.

**Step 1: Select Appearance > Add New**

Inside your WordPress site, Click Appearance, then select “Themes” and then Click “Add New” at the top of the page
Step 2: Upload the theme

1. Click Upload Theme
2. Click Choose File to select the theme file from your computer
Step 3: Choose the SmartTheme zip file from your computer

Select the SmartTheme zip file from your computer and click “Choose”
Step 4: Install the theme

Click Install Now to start the installation process
Step 5: Activate the theme

Once the installation process has completed, you should see a screen like the one below. Ensure you click “Activate” to activate the theme on your website. If you’re not ready to activate the SmartTheme yet click “Return to Themes page” and activate the theme when you are ready.
Step 6: Theme Activated

Once the theme is activated, you should see it on your Appearance > Themes page like the screen below:
OptimizePress

SmartTheme Manual - 1

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2.2. Installing & Activating the OptimizePress Plugin

The OptimizePress SmartTheme CAN be used without the OptimizePress plugin installed on your website, but please be aware that this will stop any automatic updates for your theme, and will disable any integrations functionality for opt-in forms due to this using the API services provided by OptimizePress.

We recommend installing the OptimizePress plugin on your website.

1. Go to the members hub to download the latest version

Go to https://members.optimizepress.com and download the latest version of the theme from the members hub:
2. Go to Plugins screen

Go to Plugins > Add New > Upload Plugin inside your WordPress site.

3. Click Choose File

Select Choose file to locate your plugin zip file on your computer
4. Select the OptimizePress Plugin zip file

Browse your computer files to the location where you downloaded the plugin zip to your computer.
5. Select Install Now

6. Activate the OptimizePress Plugin

Click the Activate Plugin button to activate the plugin on your site.
7. Activate your OptimizePress Plugin

You need to copy one of your license keys from the OptimizePress members hub and use this to license your version of OptimizePress.
8. Completed installation

Once you have completed the OP plugin installation, you should see a screen like this.
New to OptimizePress? Click here to watch our Getting Started video

Upload a content template in .zip format
If you have a content template in a .zip format, you may install it by uploading it here. You can find more templates in our exclusive MarketMood.

You should see this screen if the licensing process completed

Opt-in / Landing Pages
2.3. Setup Integrations Inside OptimizePress

The SmartTheme uses the integrations you setup inside your OptimizePress integrations panel. If you want to use any of the opt-in features inside the SmartTheme, you need to integrate with your chosen email marketing service first.

Follow these steps to complete your installation:

1. Go to OptimizePress on the WordPress sidebar (please complete the Activating OptimizePress step first if you haven’t already)

2. Click “Dashboard” inside the OptimizePress sub-menu

3. Select the “Email Marketing Services” option from the menus

4. Select your chosen service/crm/autoresponder and complete the steps to integrate. If you have any problems with integrating, please consult the OptimizePress help center articles or contact our helpdesk.
3. Customizing The Theme

- Introduction to the SmartTheme
- Theme Options: Header
- Theme Options: Footer
- Theme Options: Styling
- Blog
- Pages
- Optin Forms
- Social
- Miscellaneous – Search Results
- Custom Scripts
- Import/Export Theme Settings
3.1. Introduction to the SmartTheme

The OptimizePress SmartTheme is our brand new WordPress theme, designed to help you create blogs that convert visitors and browsers to subscribers and buyers.

We have taken feedback from our wide customer base for OptimizePress, and feedback on our previous theme offerings to build a brand new theme framework which allows much greater flexibility in the design of your blog and styling of your blog, as well as many new features to make your site highly optimized for conversion.

Customizing Your Blog

Once you have the SmartTheme installed and activated, you can access the main options panel for the SmartTheme by going to Appearance > Theme Options:

In the following sections, you’ll find further guidance on using the customization options to modify the look and feel of your blog.
3.2. Theme Options: Header

Once you have installed SmartTheme, you need to setup the branding for your blog.

**Step 1: Setup Logos**

The most important step in branding your site is uploading your logo for your site.

We recommend creating your logo at 2 sizes, to optimize for normal and high-definition screens.

1. **Upload a normal logo**: the logo should be no more than 220px in width. The height is up to you but we recommend no more than 50px. Logos larger than 50px in height will be scaled to fit this size and a maximum 220px width.

2. **Upload a retina logo**: this logo is for high-definition screens. For optimal performance it should be exactly 2x the size of your normal logo. The maximum size allowed here is 440px. Your logo will still show at the normal size on the screen (this larger size will not affect your design it just allows your normal logo to look clearer and more crisp on high-res screens)
Step 2: Initial Header Settings

1. Setup the site icon/favicon:

2. Setup Sticky Header:

3. Show Search box in header:

! Please note: No navigation bar will show on your header until you have set a menu for your header. You can do this by going to Appearance > Menus > Create a Menu and then assign this to the “Header Menu” location. See more information in the Menus & Navigation section on this.

Setup Header Style

The SmartTheme includes a range of header styles to fit your requirements and give your site a unique look and feel. You can select the header style from the options inside the Theme Options. Choose from the options below:

Basic: This is our default header and includes logo on the left and a menu inline with the logo on the right of the header
Navbar below header & tagline: This header includes the logo on the left, site tagline on the right and the menu under the main header section.

Centered: This includes a centered logo, and centered menu below the top logo section

Full Width: This header is set to span the full width of your browser window, with the logo aligned far left and menu aligned far right.
Setup Final header options

The final options for your header allow you to customize a number of items related to the header styling including:

1. **Dropdown Menu Line Colour** – this is the colour of the line at the bottom of your dropdown menus. You can set this to transparent if you do not want any line to appear. It’s a good idea to keep this colour similar to your main accent colour on your blog.

2. **Site Tagline** – setup the tagline for your site which appears in some menu designs.

3. **Header Background Colour** – Modify the background colour of your header. Remember that if you change this, you will need to ensure your logo looks good on your chosen background colour. We leave this on white #ffffff as default as this is the most common choice and our recommended selection for this blog design.

4. **Header Bottom Border Colour** – the header includes a subtle 1px line below it which can be customized or made transparent if you wish. This can provide a nice divide between your header and main page content. We recommend using a subtle colour here.
3.3. Theme Options: Footer

The SmartTheme includes a customizable footer section. The footer will appear on all pages and posts with your blog.

You can customize the number of columns in your footer, as well as add a logo to your footer (which appears on all pages) and customize the copyright text.

Footer Columns

Use this section to customize the main layout of your footer. You can choose from various different layouts with up to 4 columns for your content.

When you have chosen your footer layout, you can add content to it at any time by going to Appearance > Widgets on the WordPress sidebar

You can drag widgets from the Available Widgets section to any of your Footer Sidebar sections which will show based on the design you have chosen in your footer settings. You can move the content between these sidebars or remove it at any time. Please note that if you delete content here, WordPress does not have an undo function to recover your deleted widgets or content

Logo & Retina Logo

Upload an optional logo for your footer area. This will be shown above your footer copyright. We recommend choosing a smaller size for your logo and often a greyscale or faded version of your logo (PNG image with some transparency can work well)

Copyright Text

Add your copyright text for the footer of your site. This will show on all your pages

Footer Background Colour

Customize the background colour for your footer area. This affects the footer showing on every page and post on your site
**Footer Headlines Colour**
Customize the colour of the headlines for widgets you add to the footer.

**Footer Text Colour**
Customize the colour of the text in your footer.

**Footer Link Colour**
Customize the colour of the links in your footer (e.g in the recent posts list)
3.4. Theme Options: Styling

The Styling section of the theme options allows you to customize some of the key branding colours which are present throughout your site.

- Link Colours
- Category Tag Colours
- Typography
3.4.1. Link Colours

The key options in this section are:

**Link Colour**

Customize the colours for the normal hyperlinks (text links) on your blog. These are the links that appear inside your blog pages and posts content, and some other sections like links to authors.

Customize the Regular, Hover and Active states for these links.

**Button Background Colour**

Throughout the theme, we have buttons which are optimized for conversion. These include the buttons for submitting comments, search buttons and some other locations throughout your theme. Note that buttons for opt-in elements are customized within the individual options for that specific opt-in location (see the Setup Opt-in Forms section for more information on this).

On certain layouts, this will also customize the underline colour on the homepage/posts layout

**Button Hover Background Colour**

**Button Colour**

**Menu Link Colour**
3.4.2. Category Tag Colours

The Category Tag Colours option allows you to customize the tags styling within your blog.

You can find this option within Theme Options > Styling > Category Tag Colours

1. **Category Tag Text Colour** – this is the colour of the text name of your category (usually we recommend white for this unless you’re using a very light colour for your tag category background colour

2. **Category Tag Background Colour** – this is the background for the tag element. We recommend matching this with the primary branding colour for your blog

Where does this show?

The category tag element shows on your home page (if activated) for each post item, and on your individual posts in the hero section:
3.4.3. Typography

Typography is one of the key branding elements of a successful blog. It’s very important to match your typography (font choices) to your brand. The SmartTheme offers significant control of the typography on your blog, but also comes with our recommended blog styling options “out of the box”

Default Typography Options

The SmartTheme comes shipped with our recommended font selections and font sizes already selected, so you can use it as-is without any customization if the fonts fit your branding.

In the standard typography options, you can customize the font selections for the body text (the main paragraph text on your site) and the Headline font which is used in all other places on your blog.

You can also customize the font sizes and line heights for these elements.
Typography

See Advanced Settings
Activate this setting for advanced typography styles and customizations

Yes No

Uppercase Heading & Title Styling
Activate this setting if you prefer your headings and titles (such as H1 tags, hero section titles and sidebar titles) to have uppercase styling

Yes No

Body Font

Body Font Family
Karla

Body Font Size
17 px

Headline Font

Headline Font Family
Poppins

H1 Font Size
35 px 40 px

H2 Font Size
26 px 34 px

H3 Font Size
22 px 33 px

H4 Font Size
20 px 30 px
As a rule of thumb, we recommend using a line height of at least +7 pixels from your associated font size. You should however, tweak this value to see what fits with the font you have selected as different fonts will display differently on screen.

**Advanced Settings**

If you want more advanced control over your site typography, you can activate our Advanced settings:

![Typography settings](image)

This will give you more in-depth controls over the different fonts on your site, allowing you to set individual fonts and font sizes, line heights and letter spacing for most fonts you see throughout your blog.

Below is a reference list of the areas that these options control:

**Title and Tagline Styles:**

**Site Title:** This is the text that shows in the header in place of your logo if you have no logo activated on your site.

**Site Tagline:** The tagline text shows in some header designs – you can set this in the Theme Options > Header settings

**Text and Content Styles:**

Title:

Text:

Menu

**Heading Styles:**

Heading 1 (H1):
Heading 2 (H2):

Heading 3 (H3):

Heading 4 (H4):

Heading 5 (H5):

Heading 6 (H6):

Uppercase Heading & Title Styling
3.4.3.1. Default Typography Options

The SmartTheme comes shipped with our recommended font selections and font sizes already selected, so you can use it as-is without any customization if the fonts fit your branding.

In the standard typography options, you can customize the font selections for the body text (the main paragraph text on your site) and the Headline font which is used in all other places on your blog.

You can also customize the font sizes and line heights for these elements.
Typography

See Advanced Settings
Activate this setting for advanced typography styles and customizations

Yes No

Uppercase Heading & Title Styling
Activate this setting if you prefer your headings and titles (such as H1 tags, hero section titles and sidebar titles) to have uppercase styling

Yes No

Body Font

Body Font Family
Karla

Body Font Size
17 px

Headline Font

Headline Font Family
Poppins

H1 Font Size
35 px 40 px

H2 Font Size
26 px 34 px

H3 Font Size
22 px 33 px

H4 Font Size
20 px 30 px
As a rule of thumb, we recommend using a line height of at least +7 pixels from your associated font size. You should however, tweak this value to see what fits with the font you have selected as different fonts will display differently on screen.
3.4.3.2. Advanced Typography

If you want more advanced control over your site typography, you can activate our Advanced settings:

This will give you more in-depth controls over the different fonts on your site, allowing you to set individual fonts and font sizes, line heights and letter spacing for most fonts you see throughout your blog.

Below is a reference list of the areas that these options control:

Title and Tagline Styles:

**Site Title:** This is the text that shows in the header in place of your logo if you have no logo activated on your site.

**Site Tagline:** The tagline text shows in some header designs – you can set this in the Theme Options > Header settings

Text and Content Styles:

**Title:** This controls the homepage styling of the title/hero section. Some hero sections have controls separately

**Text:** This is the main body text on your site – the paragraph text font on your posts and pages.

**Menu:** Control the font and sizing of your menu text here (the menu in your site header)
**Heading Styles:**

**Heading 1 (H1):** Customize the H1 tagged text in your posts and pages

**Heading 2 (H2):** Customize the H2 tagged text in your posts and pages

**Heading 3 (H3):** Customize the H3 tagged text in your posts and pages

**Heading 4 (H4):** Customize the H4 tagged text in your posts and pages

**Heading 5 (H5):** Customize the H5 tagged text in your posts and pages

**Heading 6 (H6):** Customize the H6 tagged text in your posts and pages

**Uppercase Heading & Title Styling**

Use this option if you want to make your headlines and page titles to be in capital letters. The “Yes” setting will turn this on across your site.
3.5. Blog

This section of the theme options allows you to customize all sorts of functionality related to the blog parts of your site.

- General
- Homepage Layout
- Homepage Hero
- Blog Post Layout
- Blog Post Hero
- Blog Archive Layout
3.5.1. General

In the General panel of the Blog Theme Options, you can customize some of the metadata in your blog:

Metadata is information that is attached to each post on your blog, such as number of comments, date, author and tags. You can choose to hide these in this section individually. These options will affect all blog posts, archives and post content pages.

You can also choose to hide blog comments. This option will hide blog comments from all blog posts, even if individual posts have comments active.
3.5.2. Homepage Layout

Use the options on the Homepage Layout theme options page to customize the design of your homepage and decide what content shows here.

The options on the Homepage Layout section are as follows:

1. **Homepage Layout** – select the layout of your posts on the homepage of your site. You can choose from the posts in a vertical list, with the featured image to the left of each post title and description, or a grid layout with the posts arranged horizontally.

2. **Homepage Sidebar** – Select whether you want to have a sidebar on your homepage. Choose from the full width option (no sidebar), or a left or right aligned sidebar.

3. **Use Jetpack Infinite Scroll** – if you wish for your homepage to continually retrieve posts without pagination (so more posts load as the visitor scrolls down) you can use this option. Please note, you will need to have the WordPress Jetpack plugin installed and the Infinite scroll feature activated inside their plugin.

4. **Choose Homepage Content** – Select which posts show on your homepage. You can choose from Latest posts (showing all your latest blog posts), posts from a specific category, or posts with a specific tag applied to them.
3.5.3. Homepage Hero

The Homepage hero is the top section of your homepage below the header, which is an area ideal for displaying your latest post, or a feature of your site you want to draw attention to. This section of your homepage is “above the fold” which means it’s the first thing your site visitors will see, so ensure you use this space wisely.
### Homepage Hero

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homepage Hero</td>
<td>On, Off</td>
</tr>
<tr>
<td>Hero Layout</td>
<td>Featured Post</td>
</tr>
<tr>
<td>Featured Post</td>
<td>Show most recent post</td>
</tr>
<tr>
<td>Post Excerpt</td>
<td>Show, Hide</td>
</tr>
</tbody>
</table>

#### Button Style

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Button Text</td>
<td>Read More</td>
</tr>
<tr>
<td>Button Text Colour</td>
<td>Select Color</td>
</tr>
<tr>
<td>Button Background Colour</td>
<td>Select Color</td>
</tr>
<tr>
<td>Button Hover Background Colour</td>
<td>Select Color</td>
</tr>
</tbody>
</table>

#### Hero Background Behaviour

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hero Background Behaviour</td>
<td>Default, Custom</td>
</tr>
</tbody>
</table>

#### Hero Typography

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font Family</td>
<td>Sans-Serif, Poppins</td>
</tr>
<tr>
<td>Font Subsets</td>
<td>Lato</td>
</tr>
</tbody>
</table>

#### Description Typography

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font Family</td>
<td>Karla</td>
</tr>
<tr>
<td>Font Subsets</td>
<td>Subsets</td>
</tr>
</tbody>
</table>

#### Button Typography

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font Family</td>
<td>Karla</td>
</tr>
<tr>
<td>Font Subsets</td>
<td>Subsets</td>
</tr>
</tbody>
</table>
1. **Homepage Hero** – turn on or off the homepage hero section. If you turn this off, your homepage will just display your posts. Turning off your homepage hero also turns off your “after homepage hero” opt-in form if you have it activated.

2. **Hero Layout** – Choose the layout for your homepage hero section. Select from one of 3 options:
   - [Standard/Header Title] – Enter a title and subtitle for your hero, and specify a button text and link. If you do not want a button to show on your hero section, simply remove the button text field contents.
   - [Video] – Show a video and title/subtitle in your hero section. You can choose from the alignment of the video, and enter the video embed code you want to use from a service such as Wistia or Vimeo.
   - [Featured Post] – Show your latest blog post in your homepage hero section. This will retrieve your latest post, and show the title along with the excerpt you setup for the post. You can choose to show/hide the excerpt if you wish. You can also customize this further by choosing to show a featured post from a specific category, with a specific tag, or the most recent sticky post

3. **Button Style** – Choose from a filled button or outline button style for the hero link button

4. **Button Text** – Enter the text for your button linking to your blog post, or whatever your custom link is

5. **Button Text Colour** – Select the colour for your button text

6. **Button Background Colour** – Select the colour for your button background

7. **Button Hover Background Colour** – Select the colour for your button hover colour

8. **Hero Background Behaviour** – Customize the background image used on your hero section. By default, for the “Featured Post” option, this will pull the hero image from your blog post. You can override the blog post image with a custom image if you wish. You will need to set a specific image and styling for the other Hero Layout options (Video and Standard/Title options).

9. **Hero Text Colour** – Select the colour for the main text/description/excerpt on your hero section

10. **Title Typography** – Customize the typography for your hero section. Font will be pulled from the typography settings

11. **Description Typography** – Customize the fonts used for your hero description

12. **Button Typography** – Customize the font used for your hero button
3.5.4. Blog Post Layout

With our Blog Post Layout options, you can customize the layout of your blog posts and customize the information and sections that appear on each post:

1. **Blog Post Layout** – choose the layout for your blog post. Either single column (no sidebar), left sidebar or right sidebar layouts

2. **Enable Previous/Next Post Pagination** – Choose to show a previous and next post section at the bottom of each of your posts, allowing easy navigation to the next posts in your blog content. This box shows below the author box if you have it activated at the bottom of your post content.

3. **Author Info Box** – Choose to show an author information box at the end of your post content. This is great for showing information about the author of the post and giving your posts a more personal feel. The bio information for each author can be set within the WordPress “Users” menu section

4. **Related Posts** – Show related posts at the end of your post content. This will pull other posts from similar tags or categories and display these as recommendations to your visitors.
3.5.5. Blog Post Hero

Each of your blog posts includes a Hero section where the title of the post is displayed, along with any metadata you have enabled (author name/date etc).

The Blog Post Hero section allows you to customize the design and behaviour of the hero sections across all your blog posts. These changes will apply to all the blog posts on your site.

Blog Post Hero Options

1. **Hero Background Colour** – Set the background colour/gradient for your blog post hero section. If you have no image set, these colours will be set as the background. The left colour is the top of the gradient, the right colour is the bottom of the gradient. Set the same colour for both options for no gradient.

2. **Use Featured Image as Hero Image** – Set the featured image uploaded to your blog post as the featured image (this is the default option). Set this to No if you want to use a standard image across all your blog posts (see Featured image options below)

3. **Hero Background Image** – Set the positioning for the background image on your blog post hero sections. The featured image will be used and positioned as set here.

4. **Hero Image Overlay Colour** – Set the colour and transparency of the hero image overlay (this is the colour placed over your hero image)
5. Hero Text Colour – Set the colour of the text colour in your hero section. This will affect the title and meta data in your hero section.

**Featured Image Options**

If you choose to set the featured image option to “no”, you will be presented with additional options to customize the hero image used on your blog posts.

1. Show Featured Image in Post Content – This setting allows you to show your featured image at the top of your content (below the hero section) in the main content area of the blog post. Setting this option to “hide” will stop the featured image from being shown anywhere in your blog posts.

2. Hero Background Image – Set the hero background image used across all your blog posts. This will mean all your blog posts use the same background image as their hero image.
Use Featured Image as Hero Image
Use featured image as a hero image unless set differently on a blog post itself.

Show Featured Image in Post Content
Show
Hide

Hero Background Image
Background Repeat: Cover
Background Attachment: Center Center
No media selected
Upload
3.5.6. Blog Archive Layout

The archive pages of your blog include the category listings, tag listings and author post pages. In this section you can customize the layout of these pages:

1. **Blog Archive Layout** – Choose the layout you want for your posts. You can choose from blog post listings and grid listing design

2. **Blog Archive Sidebar** – Choose the layout for your archive pages, either a single column, left sidebar or right sidebar.

---

**Blog Archive Layout**

![Blog Archive Layout](image)

**Blog Archive Sidebar**

Choose position of a sidebar
3.6. Pages

This section of the theme options allows you to customize all sorts of functionality related to the pages of your site.

- General
- Page Layout
- Page Hero
3.6.1. General

Customize the metadata options for your blog.

This section allows you to customize whether your pages show the data and author of the page.

- **Date** – show or hide the date of creation of the page on the page itself

- **Author** – show the author of the page
3.6.2. Page Layout
3.6.3. Page Hero

Each of your blog pages includes a Hero section where the title of the page is displayed, along with any metadata you have enabled (author name/date etc).

The Page Hero section allows you to customize the design and behaviour of the hero sections across all your pages. These changes will apply to all the pages (not posts) on your site.

**Page Hero Options**

1. **Hero Background Colour** – Set the background colour/gradient for your blog page hero section. If you have no image set, these colours will be set as the background. The left colour is the top of the gradient, the right colour is the bottom of the gradient. Set the same colour for both options for no gradient.

2. **Use Featured Image as Hero Image** – Set the featured image uploaded to your blog page as the featured image (this is the default option). Set this to No if you want to use a standard image across all your blog pages (see Featured image options below)

3. **Hero Background Image** – Set the positioning for the background image on your blog page hero sections. The featured image will be used and positioned as set here.

4. **Hero Image Overlay Colour** – Set the colour and transparency of the hero image overlay (this is the colour placed over your hero image)

5. **Hero Text Colour** – Set the colour of the text colour in your hero section. This will affect the title and meta data in your hero section
Featured Image Options

If you choose to set the featured image option to “no”, you will be presented with additional options to customize the hero image used on your blog pages.

1. Show Featured Image in Page Content – This setting allows you to show your featured image at the top of your content (below the hero section) in the main content area of the blog page. Setting this option to “hide” will stop the featured image from being shown anywhere in your blog pages.

2. Hero Background Image – Set the hero background image used across all your blog pages. This will mean all your blog pages use the same background image as their hero image.
3.7. Optin Forms

See Setup Opt-in Forms section
3.8. Social

The SmartTheme includes built in social sharing features to help your site generate more traffic via sharing of your content and distribution on social networks.

Inside the Social section you will find **Sharing Options** and **Profiles Options**. These are both explained below:

### Sharing Options

The social sharing options allow you to show sharing buttons on your blog pages and posts to allow your content to be shared on the most popular social networks. The options for this section are below:

1. **Show On Content Types** – Define which content or page types your social sharing buttons will display. You can choose from media, pages and posts. If you uncheck all of these, your social sharing buttons will not show on any of your content.

2. **Sticky** – Do you want your social sharing buttons to stick to the left side of the screen, the right side, or don’t stick to the side at all. If you choose to stick the buttons to the side, you will be given the choice of adding the buttons above or below the content on your pages and posts.

3. **Active Social Networks** – which social networks do you wish to display buttons for. If you don’t want your content shared on some of the networks, uncheck the options here.
Profiles Options

The profiles section allows you to specify the pages related to your business or website on social networks such as Facebook, Twitter etc.

If you complete your profile links here, you can use the OptimizePress Social Profiles widget to add links to your profiles in the sidebars or footers of your pages and posts.

Follow these steps to set this up:

1. First, complete your social profiles on the Social > Profiles Options.

2. Go to Appearance > Widgets and locate the OptimizePress Social Profiles widget

3. Drag this widget to the sidebar or footer section you want to add it to
4. Give the your widget a title if you wish (if you leave the title blank the icons will show without a title)

5. Here's an example of the social profiles widget in action:

4cles

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3.9. Miscellaneous – Search Results

The Miscellaneous options panel currently allows you to customize the search results pages inside your SmartTheme site.

**Show Pages in Search Results** – you can define whether your normal WordPress PAGES show in the search results. If you turn this off, only your posts will be searched and displayed in the search results.

**Search Results** – you can specify the sidebar layout for your search results page. Choose from full width, left sidebar or right sidebar designs. Currently the search results page will use the list format for the posts.
3.10. Custom Scripts

If you want to add custom scripts to your Wordpress site, this is the place to do it. This area can be used to add codes for services such as:

- Google Analytics codes
- Facebook Pixel Tracking
- Custom Scripts for tracking/analytics
- Other scripts from your developer

Always take care when adding any custom scripts here, as bad script code could potentially break your site. If you experience problems on your site with display of elements, or site functionality after adding codes, return to this section and remove them to test if that was the issue.

Scripts and CSS you add here will be added to every page in your blog (posts, pages, archives and homepage).

To add custom scripts to your site, first you need to select the location (1) of the script (where you want the script to go). You can select from:

**Header** – this renders the scripts/code within the tags on each page of your site
**After Tag** – this renders the scripts/code after the start of your tag on your site, still towards the top of the page

**Footer** – this renders the scripts/code after the closing tag

**CSS** – if you have custom css Script (for styling your site elements) you can add this here. You do not need to include the tags around your code, just add the normal CSS as you would if writing a separate CSS file.

Once you have selected the location for your script, add your code within the Custom Script field (2). You can click “Add” once you have finished to add this script and choose to add additional scripts of different types if you wish

* We recommend keeping one box for each script location – so if you have multiple codes for the header, add them all inside one header scripts box rather than separate boxes for each script.
3.11. Import/Export Theme Settings

If you want to save your settings for your theme (please note this is only your options settings within our Theme options panels) you can save these to use on another site.

**Tip:** We recommend taking a backup of your site options once you have your site looking the way you want so that you can restore these settings if you accidently change something in the theme options in future.

This option will NOT export images or any content from your site, this will simply export the options settings such as colour schemes, font selections and font sizes and custom scripts inside the headers/footers. If you wish to migrate a full site to another domain you should seek help from a developer to move/migrate your site.

### How to export your site settings

- Go to Appearance > Theme Options > Import/Export
- Under the “Export Options” section, click **Download Data File**
- You should now find a file on your computer (check your downloads folder) which starts with “redux” and is a .json file. This is the format the options are saved into ready for you to import into another site.

### How to import settings from another site

If you have your site options export ready to import onto your site, we first recommend taking an export of your current site settings in case you want to restore these settings (See above).

- Once you are ready, go to Appearance > Theme Options > Import/Export
- Under the "Import Options" section, click **Import from File**
- Select the file you exported .json file you want to use from your computer
- Click the blue **Import** button
- Your options should be imported and active on your site.
4. Setup Opt-in Forms

The OptimizePress SmartTheme comes with a range of pre-installed opt-in sections to help you boost the number of subscribers you can capture with your blog.

⚠️ Before you can use the opt-in form functionality inside the SmartTheme, you MUST have the OptimizePress plugin installed and activated on your site. You should also setup at least one integration with your chose email marketing service within the OptimizePress options. See this guide for more information on how to do this.

Setup Your Integration Settings

Before you start setting up your integrations, you need to ensure you have setup at least one email service provider integration within the main OptimizePress plugin options. If you haven’t done this, please follow this tutorial and then return here when you are done.

The SmartTheme allows you to setup an unlimited number of individual integrations with your email service providers.

What this means is, you can configure individual integrations to use on specific opt-in forms on your site, meaning you can offer specific opt-in incentives (Lead Magnets) for specific posts – which we’ve always found results in much higher conversions and better-organised lists.

The first step is to go to Theme Options > Optin Forms > Integration Settings
You can use the slider at the top of this page (1) to customize how many separate integrations you will need. Once you have selected the number of integrations, the page will reload (allow a few seconds) with the new boxes for each integration.

Please be aware, once you have integrations setup in this section, do not reduce the number of integrations below the number you are using as this will clear the integration data and stop your forms from working. You can add more integrations at any time and this will not affect your existing forms, just take care when using the slider.

To setup an individual integration, click the (+) plus button next to “Integration #1” to open the integration settings. You can then customize the individual settings for this integration…
1. First we recommend changing the **Integration Name** – you can use a name which is appropriate to the list or campaign you are setting up for this integration. For the example above, I am setting up an integration as part of a lead magnet which gives away 62 free images. This integration name will be shown in the dropdowns when you integrate your individual opt-in forms, so make it something you will recognise.

2. **Integration Type** – select which service you are integrating with, or choose custom code or email data (note: your server must support emailing data to use the email data option). You will see any email marketing services you have integrated in the OptimizePress settings. If you need another service, first go and integrate with it inside OptimizePress and then return to this screen.
3. Integration List – once you have selected the integration type, your individual lists or forms will be retrieved from your service provider in most cases, and you can choose where you want to send the subscribers to this integration.

The additional options on this screen allow you to customize the fields for your form (currently only name and email fields are supported). Ensure that if you have fields present inside your autoresponder (e.g. first name) you also have them present here – so don’t disable first name in such cases.

Once you are happy with your settings, click Save Changes to make this integration available in your opt-in form locations.

Adding Additional Integrations

You can return to this section at any time to add additional integrations to your site, which can then be used on individual opt-in forms, which we will detail more in the following pages.

Setup Individual Opt-in Forms (Form Locations)

Once you have setup at least one integration in the Integration Settings section, you’re ready to add this to a location on your site. This is where we set where the form will appear and what it will look like.

First, select a location or page type from the sidebar of the Optin Forms options:
You have a range of locations and page types to select from including:

**Homepage** – setup an opt-in form to your homepage of your site

**Posts** – setup an opt-in form to all of your blog posts (anything created within the “Posts” section of WordPress)

**Pages** – setup an opt-in form to all pages on your site (anything created within the “Pages” section of WordPress)

**Archive** – setup an opt-in form to your archive pages (this is pages such as category post listings, author post listings)

**Search** – setup an opt-in form on your search results pages

**404** – setup an opt-in form to capture visitors who entered an incorrect URL where the page or post doesn’t exist
**Widget** – setup the opt-in form for the OptimizePress Optin Widget for your sidebar or footer of your site (this can be added on the Appearance > Widgets page)

Selecting one of these page types or locations will render your form on all pages or posts of that type. For example, if you select “posts” and setup an integration, this will render the chosen form on all posts on your blog.

* If you want to add an integration on a specific page or post, we also have options for that – see further down this section of the SmartTheme guide

### Opt-in Form On-Page Locations

Once you have selected the overall page type or section of your site where you want to configure your opt-in form for, you need to select one of our optimised on-page locations for your form.

The SmartTheme has a range of optimised on-page opt-in locations so you can maximise the opportunities for you to capture subscriber information and get visitors onto your lists and into your funnels.

The key positions are:

1. **After Header** – This bar is located below your header bar when activated
2. **After Hero** – This bar is located below the hero (large title section with background image) on your pages and posts
3. **Before Footer** – This bar is located above the footer section of your website and gives you an opportunity to offer a different opt-in offer if you wish or remind your visitors of your main lead-magnet or opt-in incentive.

![Opt-in Form On-Page Locations](image-url)
Follow these steps to configure your opt-in form:

1. **Enable** – this turns on the opt-in form
2. **Integration** – select one of the integrations you should have already setup earlier. Your custom integration names will show in this dropdown allowing you to easily select the correct integration for this optin location.

3. **Optin Style** – Select from a Light or Dark styled form to fit with your site branding.

4. **Form Headline** – customize the headline for your form to fit your lead magnet or opt-in incentive offer

5. **Form SubHeadline** – Add a subheadline for your form here

6. **Form Submit Button Text** – customize the text on the submit button for your form

7. **Form Submit Button Text Colour** – customize the text on the submit button for your form

8. **Form Submit Button Background Colour** – match the button colour to your site or company branding here. This is the background colour for your button

9. **Form Submit Button Hover Background Colour** – select the hover colour for your opt-in form button

10. **Show Form in Lightbox / Popup Optin** – If you would like to show your form in a lightbox with a trigger button (2-step opt-in style) you can activate this option. This will display some further options you can find detailed below:

## Lightbox / Popup Optin Settings

If you would like to use a 2-step process for your opt-in form which has been proven to increase conversions in many situations – you can activate the “Show Form in Lightbox / Popup Optin” option when configuring your opt-in form.

This option will present a number of additional options which you can customize to setup your trigger button and lightbox form:
1. **Show Form in Lightbox / Popup Optin** – activate this option to use the 2-step lightbox opt-in form process

2. **Trigger Button Text** – Customize the text for the button which will trigger the lightbox opt-in box

3. **Trigger Button Text Colour** – Customize the text colour on the trigger button

4. **Trigger Button Background Colour** – Customize the background colour for the trigger button

5. **Trigger Button Hover Background Colour** – Customize the hover colour for the trigger button

6. **Lightbox Form Headline** – Add a headline for your opt-in box (this is the headline inside the lightbox popup)

7. **Lightbox Form Subheadline** – Add a subheadline for your opt-in box

8. **Lightbox Form Submit Button Text** – Customize the text of the form submit button in your lightbox

9. **Lightbox Form Submit Button Text Colour** – Customize the text colour of the submit button on the lightbox form

10. **Lightbox Form Submit Button Background Colour** – Customize the background colour of the button in your popup form

11. **Lightbox Form Submit Button Hover Background Colour** – Customize the hover colour of the button in your form

12. **Lightbox Form Privacy Text** – Add a privacy/spam notice for your opt-in form (shows below the form submit button in the lightbox popup)
4.1. Adding an Opt-in Form On Individual Pages or Posts

To give you maximum flexibility, the SmartTheme includes the ability to enable (or disable) opt-in forms on specific pages.

With our on-page/post options, you can choose to either leave the default options set, (this will use whatever settings you used within the Theme Options > Optin Forms settings), or you can use the Custom Settings to customize the behaviour of the opt-in form on the individual page/post:

You should find the custom options in the “Optin Boxes” section below your main post content (if you do not see this box, please go to “screen options” at the top of your screen and ensure that “Optin Boxes” is checked):
Add New Page

Enter title here

Optin Boxes

After Header

After Header Optin Behaviour

Default [Custom] 1
Default will use settings set in Theme Options, and custom will set options only for this post.

Enable After Header Optin

Enable [Disable] 2
1. To customize the opt-in form on a specific page, first click the “Custom” option in your chosen header location.

2. You can now choose to enable the opt-in form. If you leave this disabled, this will disable the form from showing in this location on this specific page or post (overriding any default form set – this is how you turn off a form for a specific page if you don’t want it to show).

If you enable the Opt-in form, you can then customize the form using the same options you had available in the opt-in form section of the theme options (see image below).

**Pro Tip:** Remember you can setup an individual integration for this page or post – this is a great way to setup a specific opt-in form for a lead-magnet or content upgrade specific to the content on your individual page.

Here are the options you have available – see the main Opt-in forms section of this guide for more explanation on each of these options.
Enable After Header Optin

[Enable] [Disable]

Integration
Select the integration defined in Integration Settings submenu.

Select an item

Please configure at least one integration in "Integration Settings" submenu to use Optin Forms.

Optin Style

[Light]

Form Headline

Launch your first blog with our new OptimizePress S

Form SubHeadline

Beautiful theme for marketers, powered by Optimize

Form Submit Button Text

Let's Start

Form Submit Button Text Colour

[Select Color]

Form Submit Button Background Colour

[Select Color]

Form Submit Button Hover Background Colour

[Select Color]

Show Form in Lightbox / Popup Optin

[Yes] [No]
5. Menus & Navigation

The SmartTheme supports a primary menu inside WordPress. This menu will show in the header of every page inside your blog. The menu will show alongside your logo or under it, depending on your header design selection which can be set within Theme Options > Header

Start Creating Your Menu

1. First click Appearance on the WordPress sidebar menu
2. Next click Menus
3. Your menu may already have some content created within it (if you have pages created). Simply click “Create Menu” to create your initial menu – we will modify this next…

![Creating Menu in WordPress](image.png)
Add links to your menu

Once you have saved your menu, you can customize the content of it. You can add links to posts, pages, categories or custom links from the sidebar of this page:

Arrange your menu items

You can drag and drop your pages around in your menu to arrange them the way you want.
Set your menu location

The final step is to set the menu display location to "Header Menu" and click Save Menu again.
Customize your menu link colours

Remember you can setup your menu link colours by going to Appearance > Theme Options > Styling > Link Colours

The Menu Link Colour Section allows you to customize the main link colour (Regular), the hover colour (Hover) and the Active colour which shows when you are visiting the page linked to in the menu.
6. Sidebars & Widgets

Widgets can be accessed via the WordPress Appearance > Widgets menu.

The SmartTheme includes a number custom widgets you can add to your sidebars. The SmartTheme includes a main sidebar widget area, and then up to 4 footer widget areas.

A widget is an element which contains certain functionality which you can add to any widgetized area of your theme. In the case of the SmartTheme, this is the sidebar and footer areas.

SmartTheme Widgets

The SmartTheme includes the following widgets:

- **OptimizePress Optin Form** – This allows you to place an opt-in form on your sidebar. The settings for this form can be found within Optin Forms > Widget

- **OptimizePress Social Profiles** – This allows you to add social icon links to your sidebars/footers. You can customize these links within Theme Options > Social

WordPress also includes a wide range of widgets, and further widgets can be added through additional plugins from the WordPress plugin repository.

Add Sidebar Widgets

To add widgets to your sidebars/footers, go to Appearance > Widgets and then drag the widgets from the left to the widget area you want to use. Remember to save when you have added your widget to your chosen widget area.

Setup The Footer Widget Areas

To setup the number of columns (widget areas) in the footer, go to Appearance > Theme Options > Footer and then look for the Footer Columns option where you can set the layout for the footer. Once you save this option, refresh the widgets screen to see the new widget areas available.