

WordPress customization basics and plugins to edit your theme

Buying themes is all well and good, but you will nearly always need to customize them to make them fit your brand properly. Whether it's changing colours or fonts, or adding a logo - these things can make a big difference to the branding of the site helping to make it unique to you.

Why you shouldn't edit theme files

When you first start using WordPress it's tempting to just edit themes directly but **this is not recommended**. Initially it will be great as you can make changes quickly and conveniently – but then a theme update will be published – and you'll have to decide between updating (and making your changes again) and keeping the customized theme.

Unfortunately there's only really one option here.

You should (almost) always choose to update your theme. Not only will the theme update (probably) include new features but it will likely also include bug fixes, and sometimes security fixes. Security is more important than anything else - nobody wants to have to deal with a hacked website (we'll cover security in more detail in a later lesson).

To fix this we want to be able to make changes to how a theme works **without editing the theme directly**.

There's a few different ways to tackle this. In this email we're going to cover the easiest method, which is **how to make simple changes using plugins**. We'll equip you with the tools to make the changes you want.

Using the Customizer

Let's start with by far the easiest method of customizing your WordPress theme.

The Customizer is the future of WordPress. A lot of development will be happening here and most plugins we'll look at support the Customizer so it's worth starting with.

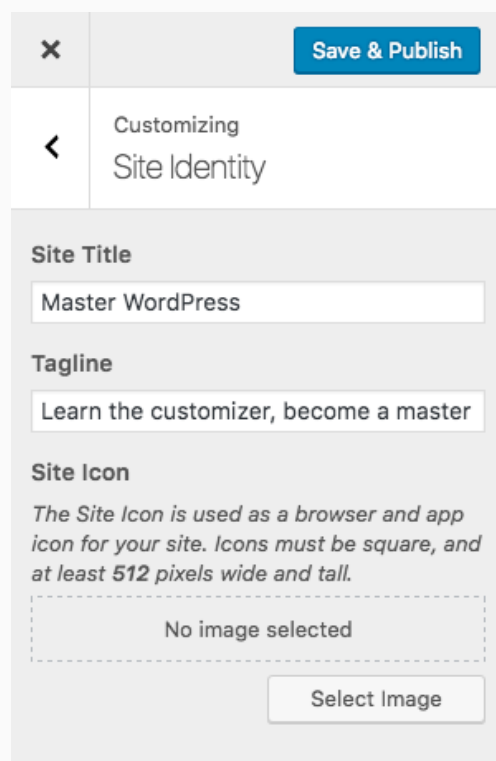
The Customizer is a place where you can edit theme options and see the changes you make apply to the website almost instantly. It's a great place to make changes to your site since you can edit things and see the effect quickly – but your users

won't see the changes until you press save. This means you can test things without the risk of your site breaking.

There's two ways to access the Customizer. From the WordPress Admin, you can go to the Appearance > Customize menu. Alternatively - when you're browsing your site itself, there's a Customize link in the header. Clicking this will take you straight to the customizer.

Before we look at plugins, these are all the areas you can customize with the Customizer (nb not all themes support all of these):

- **Site Identity** - this covers setting your site title and description, and a website logo. These are generally displayed in the header of your site. You can also set a site icon - this will be used in browser tabs to help people tell which website the tab is for.
- **Colors** - You can set a header text colour, and a site background colour here.
- **Header Image** - Set a site header image. If you like you can upload multiple images and set them to randomize - but I don't generally think this is a good idea. It's hard to make a memorable brand when your header image keeps changing.
- **Background image** - upload a background image, and set its properties (tiling and position). If you're going to do this then go for something subtle. Complex / bold images will detract from the content of your website.
- **Menus and Widgets** - control the menus and sidebar content that displays on your site. The widgets will only display the sidebars on the page you are viewing - so browse around the site to see the widgets you can change.
- **Static Front Page** - remove the blog posts from your site and set a page as the front page for your website. Great for sites that are about something, as opposed to a tradition blog/ news site.



The screenshot shows the WordPress Customizer interface for the 'Site Identity' section. At the top right is a blue 'Save & Publish' button. Below it is a breadcrumb trail: 'Customizing' followed by 'Site Identity'. The main content area is divided into three sections: 'Site Title' with a text input field containing 'Master WordPress'; 'Tagline' with a text input field containing 'Learn the customizer, become a master'; and 'Site Icon' which includes a descriptive paragraph: 'The Site Icon is used as a browser and app icon for your site. Icons must be square, and at least 512 pixels wide and tall.' Below this is a dashed rectangular box containing the text 'No image selected' and a 'Select Image' button at the bottom right.

It's fairly self explanatory to use all these. Use the menu down the left hand side to select the different areas and fill in the fields that pop up. Note that if something isn't visible on the page you're on you won't be able to edit it – so if you're on the homepage you won't be able to edit the post sidebar widget area (just click through to a post on the live preview to do that).

Once you're done making changes you can hit "Save & Publish" and your site will be immediately updated.

Tools for editing CSS

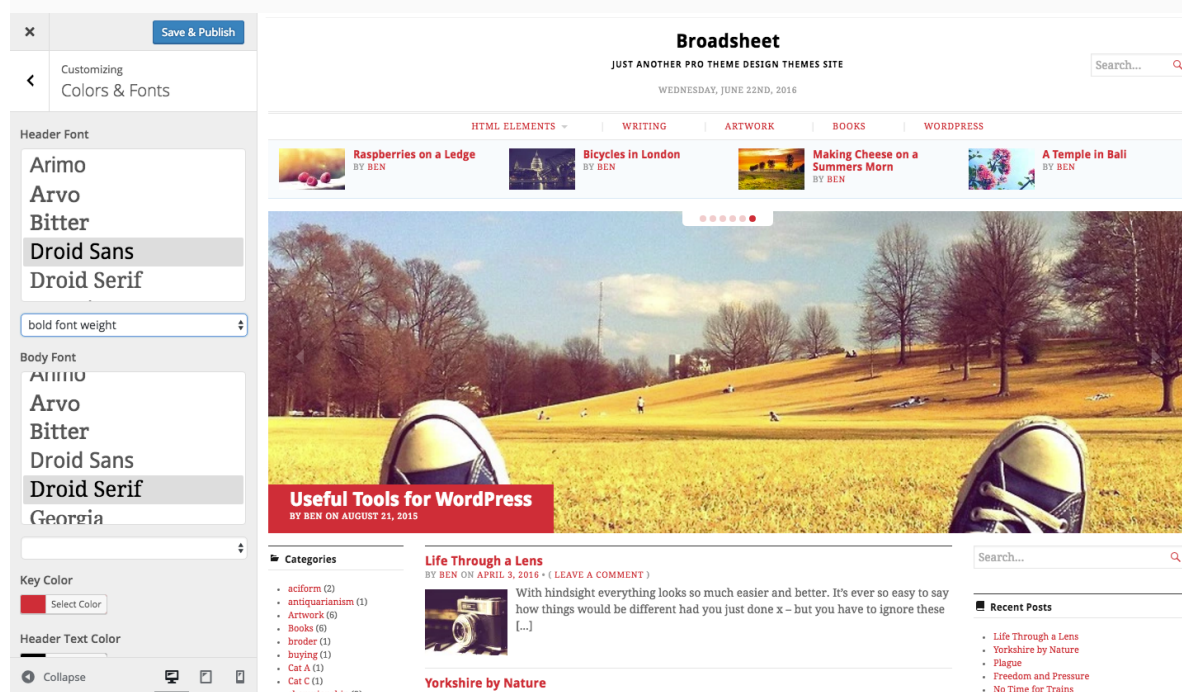
The Customizer is good for the basics, but to go beyond you'll need some extra plugin firepower. To really make progress you'll need to edit CSS. CSS is the code which styles your WordPress theme. To change how it looks, therefore, you need to change the code.

Or at least, in theory.

Learning CSS is complicated and whilst it may be worth it for some in the long run ([check here](#) for all the details you'll need), you can get a surprising amount done knowing very little code. The tools below will give you a lot of power with relatively little coding skill required.

Styleguide - Custom Fonts and Colours

The first tool we'll look at, and the easiest to use is [Styleguide](#). I made this plugin to help my customers at [Pro Theme Design](#) edit the fonts and colours in the themes they purchase.



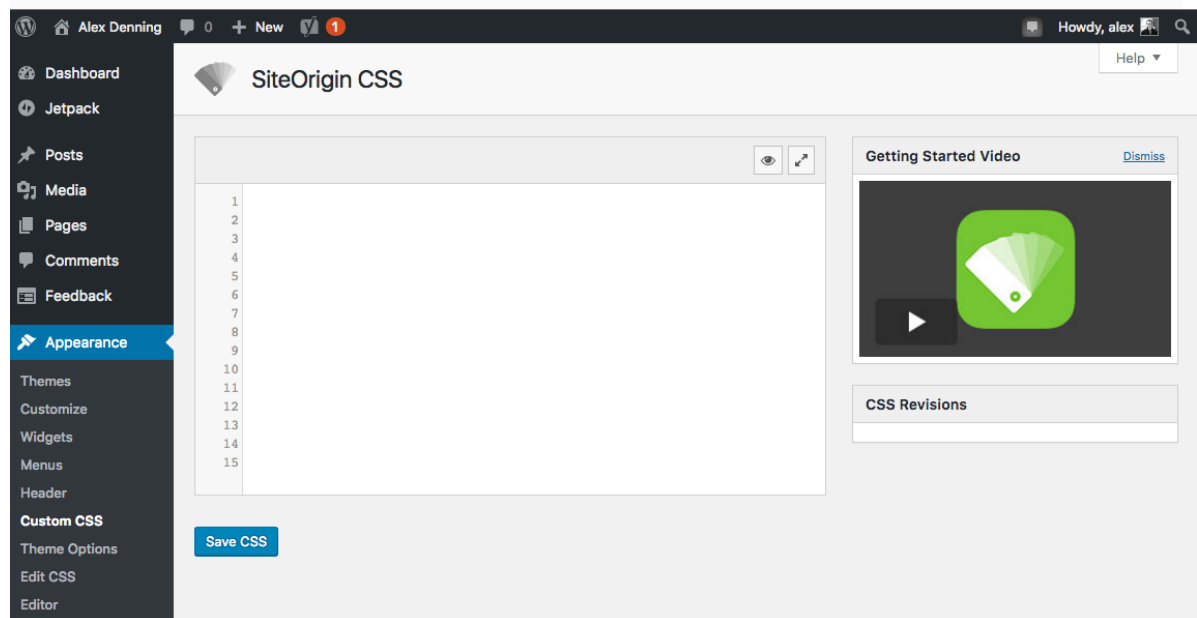
Styleguide adds an interface in the Customizer for selecting the fonts in use on your site. Colors can be edited too but only in themes which add support (so only Pro Theme Design themes which I make and the default WordPress themes support this).

The difference between Styleguide and other font plugins is that it should work with no additional setup. Most other plugins require selecting elements, or setting up css - whereas Styleguide 'Just Works' (most of the time ;)).

Very useful plugin for making basic typography changes to your site.

SiteOrigin Custom CSS

For more advanced changes (but still not needing any coding knowledge) we'll want [SiteOrigin CSS](#). This free plugin lets you edit CSS without knowing any CSS. You'll get a visual editor for editing code with an instant live preview.



It's really powerful and the best way of editing your site without learning CSS, but you will need to spend a little bit of time learning. Once you've mastered it, however, you'll be able to select any element on your site and change its properties - that includes both fonts and colours (and almost everything else).

There's an easy-to-follow video tutorial showing you the basics; it looks complicated but is relatively easy to pick up. You can install the plugin by heading to Plugins → Add New on the WordPress Dashboard, searching for SiteOrigin CSS, installing and activating.

Once the plugin is running you'll find a new menu, Custom CSS, under Appearance on the Dashboard. Head there and you'll find a blank screen.

Get my new free course: Becoming a WordPress Master

I wrote a couple of months ago **I was planning** on setting out freelancing full-time after my graduation (and **a trip to Japan**). This has now all happened and I'm entering my third week working for myself 100% of the time.

I'm excited to be writing regularly again, and over the next couple of weeks I'll be transitioning some content from **BlogBetr** to here and publishing a new post every fortnight. You can **grab a newsletter subscription** if you'd like to stay updated.

One of the first projects I've been working on is a free course for WordPress users to become WordPress *masters* and do everything they want, themselves.

There are a ton of WordPress courses for beginners and a second ton for experts, but nothing that bridges the gap – and that's where **MasterWP** comes in.

You'll then want to first watch the "getting started" video and second click the eyeball to load up a live preview of your site. You can now click on the element you want to edit and change the specifics on the left hand side (for example font size, width, colour).

Edit the values to get the look you want and you'll see a live preview. Press the tick once you're done and the plugin will generate all the code to make your changes live. Save and you're done. SiteOrigin CSS makes customization highly accessible and easy to use.

Properly editing CSS code with Jetpack

If with SiteOrigin you get to know CSS better and want to edit it code-only – or if you've got the skills – then [Jetpack's Custom CSS module](#) is the best tool to use. This allows you to edit the CSS on your theme without touching the code on the underlying theme.

There are a few benefits of using Jetpack Custom CSS over other CSS plugins.

1. **It's secure.** Most plugins just save the CSS to the database and then output it on the front end, however Jetpack makes sure there's no security vulnerabilities included. This might sound like a strange thing to worry about - but it's possible that if someone got access to your database or admin that they would be able to insert insecure code into every page of your site. With Jetpack CSS this code would not be displayed.
2. **It keeps versions of the CSS.** This means that if you make changes and don't like them - then you can go back through the old versions and restore the one that was working well.
3. **It has the option to use LESS or SASS.** These are more technical features for people already proficient in CSS, but they can be really handy if you know what you're doing.

Jetpack is a powerful plugin that we'll come back to plenty of times over this course (we've already mentioned it in this lesson), so it's worth having installed (if you don't already). You'll find info on [getting started with Jetpack here](#), info on [Custom CSS in Jetpack here](#) and [the plugin can be downloaded here](#).

If you're making very simple changes use Styleguide. If you want to make code changes to your site without knowing code, SiteOrigin CSS is the thing to use. If you want to change code, Jetpack has you covered.

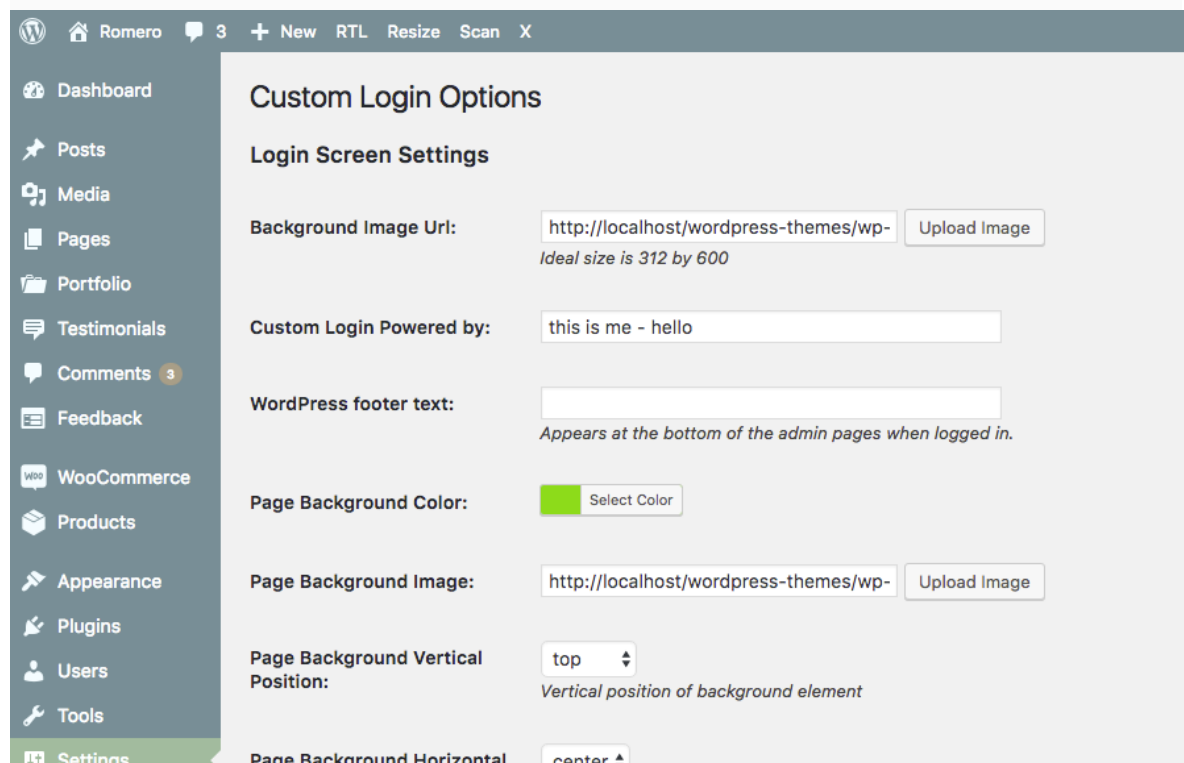
But what about customizations for WordPress that aren't just tweaking styling?

Plugins for extended customization

Finally, let's take a look at a series of plugins which let you make big changes to WordPress easily. The Customizer is good for the basics and CSS is perfect for tweaking styling, but these are the best plugins for taking WordPress one step further.

Custom Login

[BM Custom Login](#) lets you customize the WordPress login screen to match your brand. If you're making a site for clients, or where other users will login, then it's a nice customization touch which can add a layer of professionalism.



The plugin offers you a simple way to edit the images, and colours (and if you know how, the CSS) for your WordPress login page, giving you that extra little

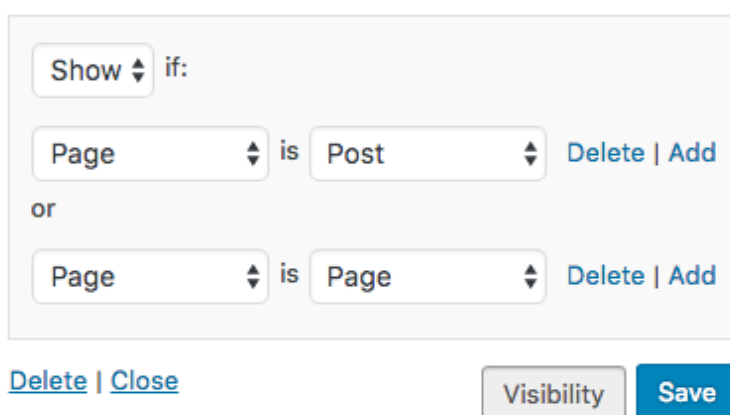
differentiator to make your website stand out. It's really well coded (I made it - Ben).

Get Custom Login - <https://wordpress.org/plugins/bm-custom-login/>

Custom Sidebars - Jetpack Widget visibility

A rather clever feature in the must-have [Jetpack plugin](#) is the ability to selectively display different widgets on different pages.

This can mean you can display some widgets on the homepage only or other widgets on the archives and not blog posts. This is a really powerful and useful way of customizing your site (especially since you can do so much with widgets anyway).

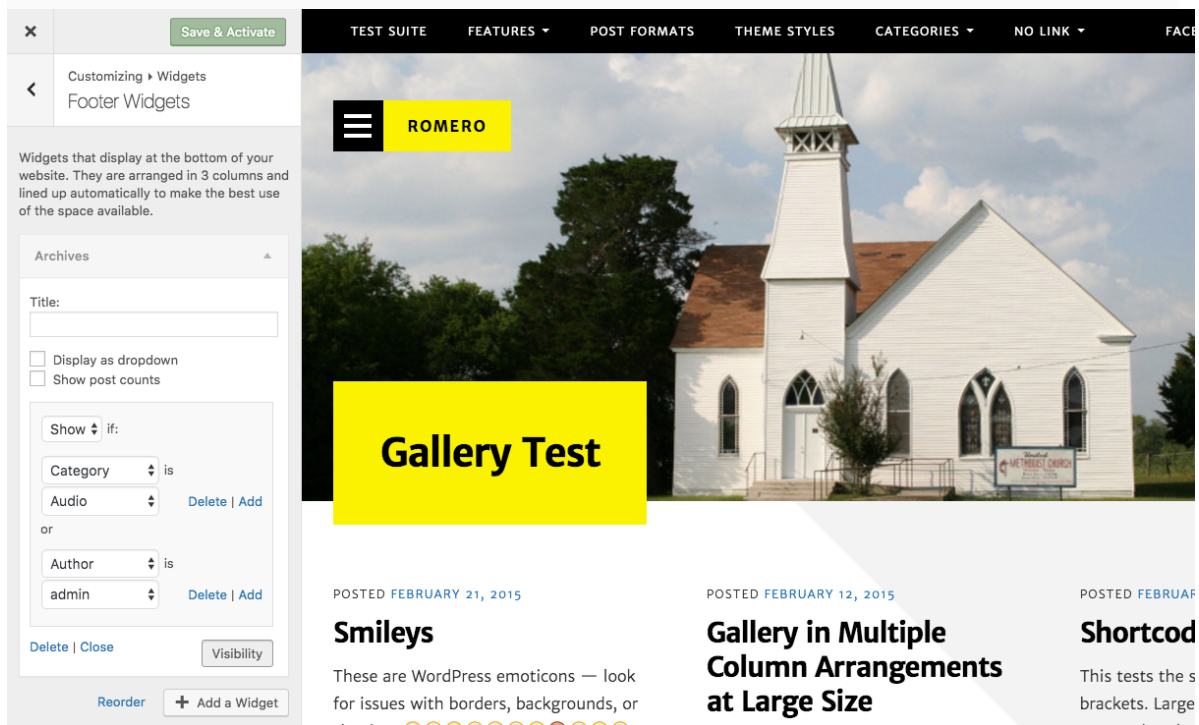
The screenshot shows the 'Widget Visibility' settings in the WordPress dashboard. At the top, there's a 'Show' dropdown with an upward arrow, followed by 'if:'. Below this, there are two rows of settings. The first row has a 'Page' dropdown, 'is', a 'Post' dropdown, and 'Delete | Add' links. The second row starts with 'or', followed by a 'Page' dropdown, 'is', a 'Page' dropdown, and 'Delete | Add' links. At the bottom left, there are 'Delete' and 'Close' links. At the bottom right, there are 'Visibility' and 'Save' buttons.

Widget visibility in action.

Widget visibility is incredibly flexible, but you have to be careful since complex rules can be both slow, and very confusing to work out. These are the steps for using it:

1. Head to Appearance → Widgets on the Dashboard.
2. Drag and drop widgets to the widget areas you want them to display.
3. Expand the widget with the visibility you want to change.
4. Click "visibility" (next to save).
5. Choose "show" or "hide" depending on your preference.
6. Add rules for the posts. For example, to display a widget only on posts and pages select "show" → "page" is "post" (did warn it was confusing).
7. Add extra rules as required. To display the widget on posts *and* pages you'd add a second rule of "page" is "page".
8. Save and test when you're done!

Widget Visibility is a module built into Jetpack. You can activate it by heading to Jetpack's settings, hovering over and pressing "activate".



Get Jetpack - <https://wordpress.org/plugins/jetpack/>

Unique Header Images

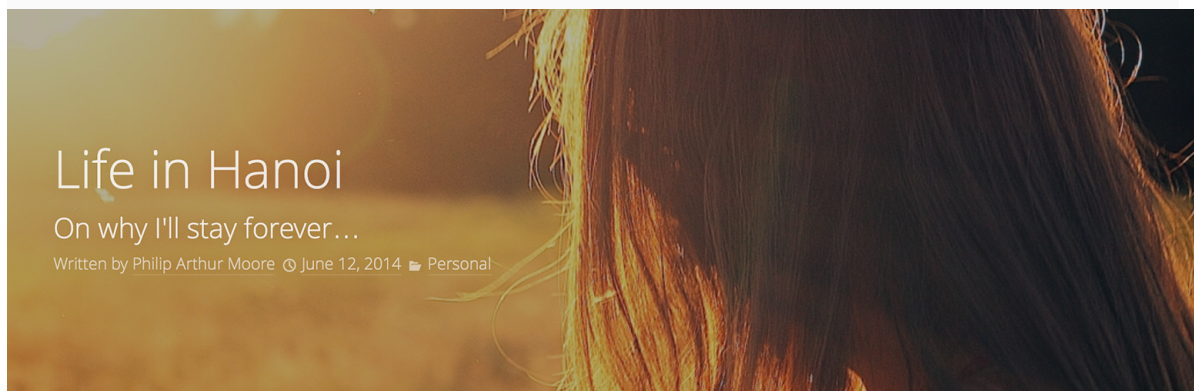
As we saw in the Customizer, you have the option to upload your own header image. [Unique Header Images](#) takes this further, giving you the option to upload a different header image for each post/page/category. Handy – and unique – plugin.

The plugin is easy to use. You'll find an extra box when editing posts and pages with the option to upload a header. Add one in and you're done. For categories, head to Posts → Categories and edit the category you want to add a unique header to.

Get Unique Headers - <https://wordpress.org/plugins/unique-headers/>

Add Subtitles

Subtitles are a nice way to add extra information about a blog post - and the subtitles plugin is a simple way to add this. It adds a 'subtitle' box to your post edit screen - where you can add the extra message. It then automatically inserts the subtitle beneath your blog post.



I've used this on a number of sites and themes and out of the box it tends to work surprisingly well, integrating nicely with a range of designs.

Get Subtitles - <https://wordpress.org/plugins/subtitles/>

Full customization control

Using plugins to customize your site is a relatively risk free method for making changes. If anything goes wrong you can revert your changes – or just deactivate the plugin.

Most of these plugins have visual interfaces for editing things, which makes it even easier for you to get started. Here's a recap of the tools we've mentioned:

- The Customizer, built into WordPress, for basic changes.
- [SiteOrigin CSS](#) for editing CSS without knowing CSS.
- [Jetpack's](#) Custom CSS module for editing CSS code.
- [BM Custom Login](#) for making a custom login page.
- [Jetpack](#) (again) for Widget Visibility.
- [Unique Header Images](#) for different header images across your site.
- [Subtitles](#) for subtitles on your posts.

The plugins we've introduced you to here don't let you do everything – you'd need to be using child themes to do that – but they let you do 80% of the changes you'd want to make, with 20% of the effort required. They're the perfect starting point, and as you use them you'll only get more proficient.