adviser portals

Pages & Content

Learn how to manage the pages and content on your website using the built in content management system

🗋 Pages

☰ Content

Pages

Your Adviser Portals website comes with many pre-built pages; Home, Information, Contact Us etc. Pages hold all of the content on the site and are found by using the links in the navigation bar. Using the built in content management system (CMS) you can add, edit, delete and move pages to make the site more personalised to your business.
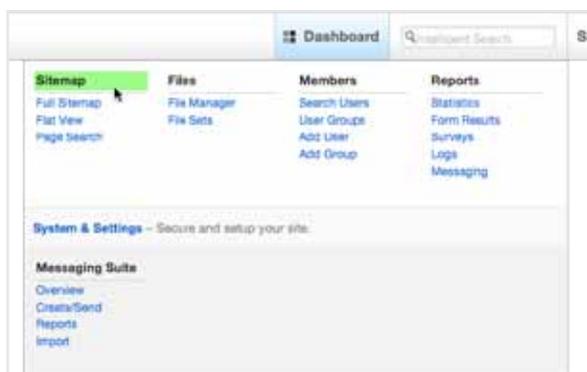
Adding a Page / Editing a Page / Deleting a Page / Moving a Page / Page Permissions

To manage pages, log in to your site with the 'siteadmin' details received in your 'Welcome Email'.

There is no limit to the amount of pages you can add to your Adviser Portals website. Simply follow the steps below and repeat for each new page.

1/ Hover your mouse over the '*Dashboard*' link in the editing toolbar at the top of the site

2/ In the dropdown click on '*Sitemap*'

3/ You will now see a list of all your pages. Click on the page you wish to add a new page beneath. So for example, click '*Home*' if you want to add a page to the top level of your navigation and select '*Add Page*' from the options

4/ Next you need to select a Page Type - for a regular page select '*Page*'

5/ Give the page a '*Name*' - this is what will display in the navigation
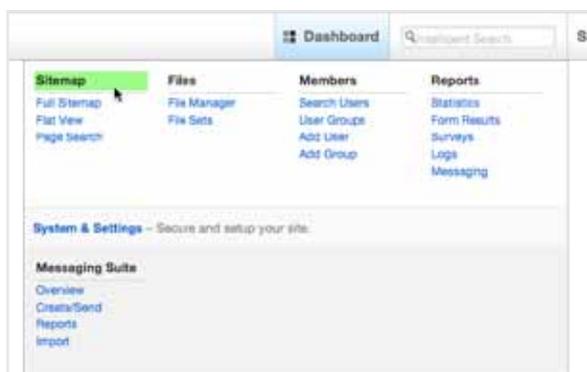
6/ Click '*Add Page*'.
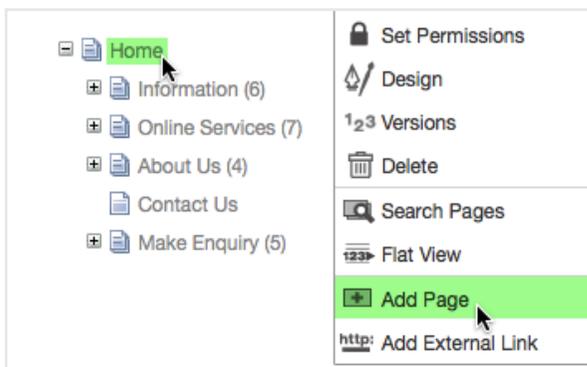
Top Tip: To see all of the pages beneath an other page in your sitemap, you may need to click the small + icon next to each of the pages.

Sometimes you may need to change the name or URL of a page.
Instead of deleting the page and starting again, you can edit it instead.

1/ Hover your mouse over the '*Dashboard*' link in the editing toolbar at the top of the site

2/ In the dropdown click on '*Sitemap*'

3/ Click on the page you wish to edit and select '*Properties*' from the options

4/ To change the name, simply update the '*Name*' field

5/ To change the URL click on the '*Page Paths & Location*' tab and then update the Canonical URL field

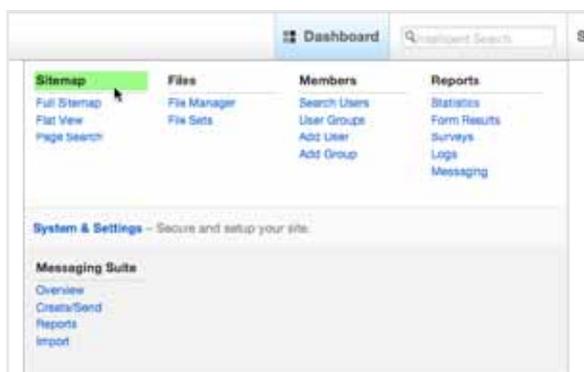**6/** Once you have finished editing the pages properties click '*Save*'.
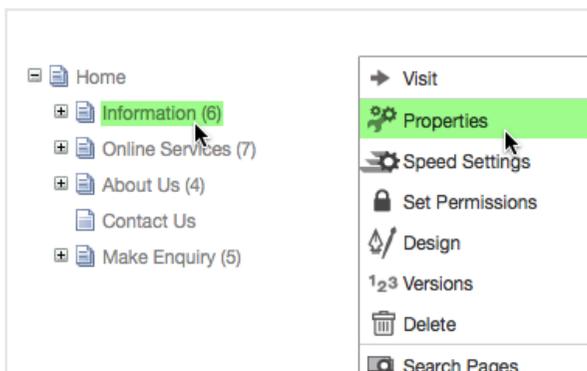
Top Tip: You can edit a pages properties directly from the page itself. Simply navigate to the page you wish to edit and then click 'Properties' from under the 'Edit' menu.
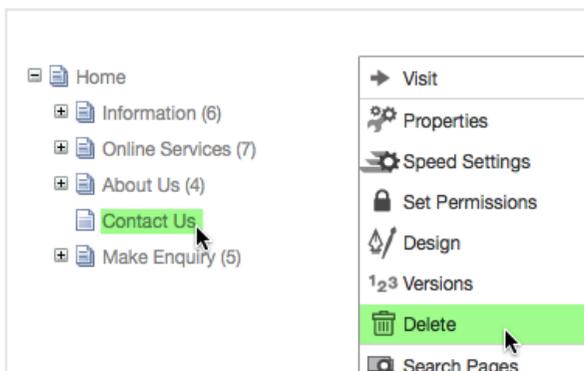
If you no longer need a page on your site then you can delete this from the sitemap.

1/ Hover your mouse over the '*Dashboard*' link in the editing toolbar at the top of the site

2/ In the dropdown click on '*Sitemap*'

3/ Click on the page you wish to delete and select '*Delete*' from the options

4/ Finally, confirm you wish to delete the page by clicking the '*Delete*' button

Top Tip: A deleted page can be recovered by moving it from the trash. The trash is accessible when you click the 'options' link on the sitemap page and then check 'Show System Pages'.
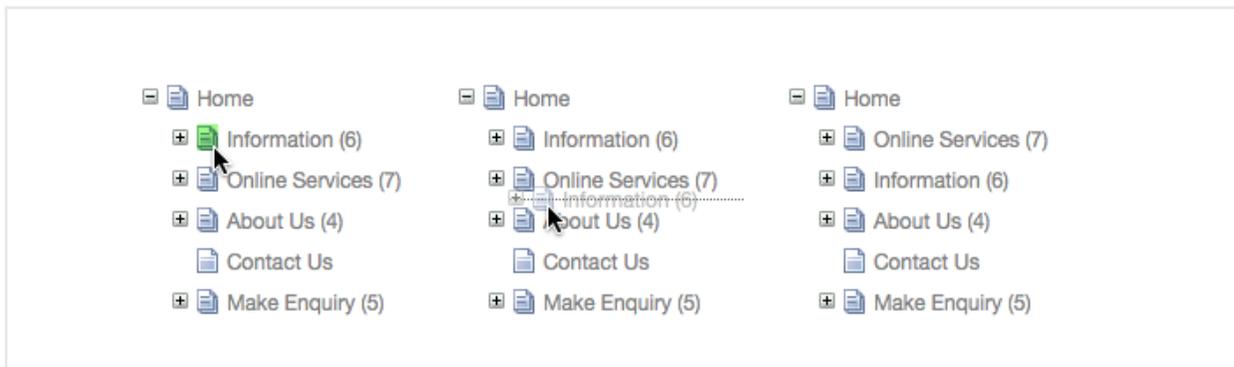
Pages can be moved around the site so you can re-order the links in your navigation.

1/ Hover your mouse over the '*Dashboard*' link in the editing toolbar at the top of the site

2/ In the dropdown click on '*Sitemap*'

3/ Click and hold your mouse down on the page icon next to the page you wish to move and then drag and drop to its new location.
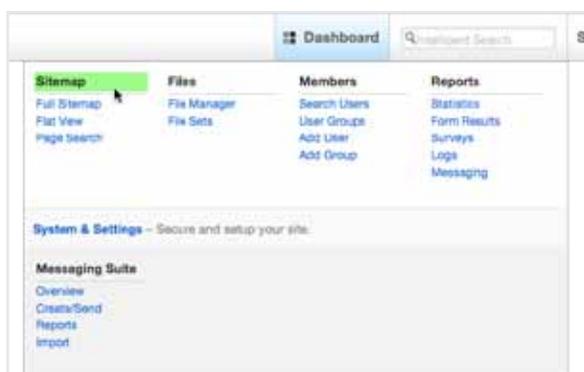
Top Tip: Dropping a page on top of another page makes it a sub page i.e. underneath in a dropdown navigation.

Pages / **Permissions**

A page's permissions determine who can view and edit that page. You may wish to create pages that can only be viewed when logged in, you can change the permissions of a page to allow this.

1/ Hover your mouse over the '*Dashboard*' link in the editing toolbar at the top of the site

2/ In the dropdown click on '*Sitemap*'

3/ Click on the page you wish to change permissions on and select '*Set Permissions*' from the options

4/ Under the '*Who can view this page*' section uncheck '*Guest*'. A guest is someone who is NOT logged in to the site

5/ Click '*Save*'

6/ If you log out of the site, you will notice that this page is no longer accessible.
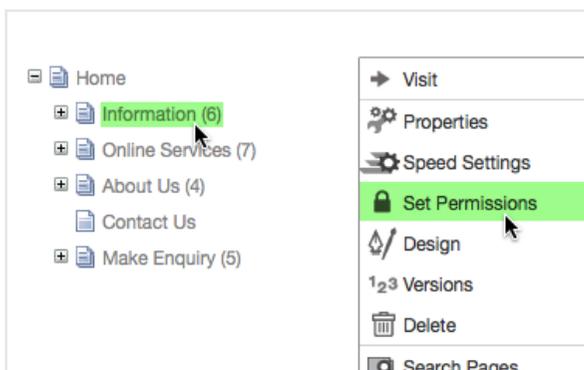
**Top Tip: By default all pages you create will be visible to anyone visiting your site but can only be edited by the Administrators once logged in.**

Content

The content on the pages of your Adviser Portals website can be managed using what we call 'blocks'; there are various types of block that control different kinds of content. There are 3 blocks that you will probably use more than most. These are; 'Content', 'Image' & 'Adviser Portals Content'.

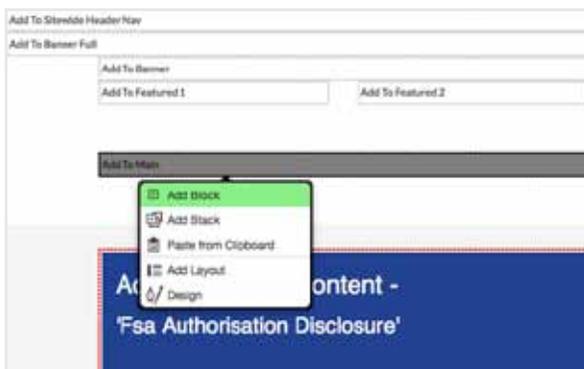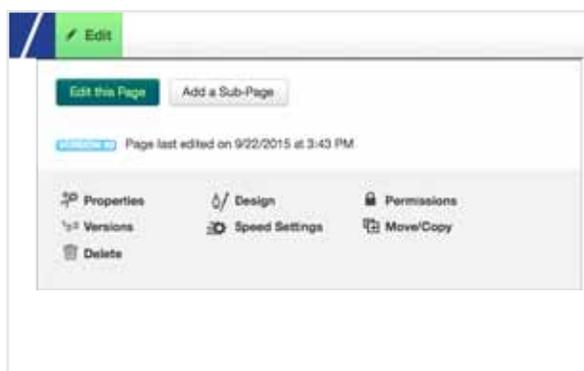Adding a Block / Editing a Block / Deleting a Block / Moving a Block

To manage pages, log in to your site with the 'siteadmin' details received in your 'Welcome Email'.
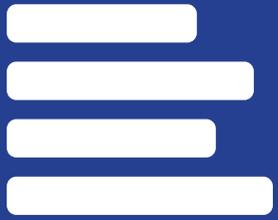
Content / **Adding a Block**

There is no limit to the amount of blocks you can add to your Adviser Portals website. Simply follow the steps below and repeat for each new block.
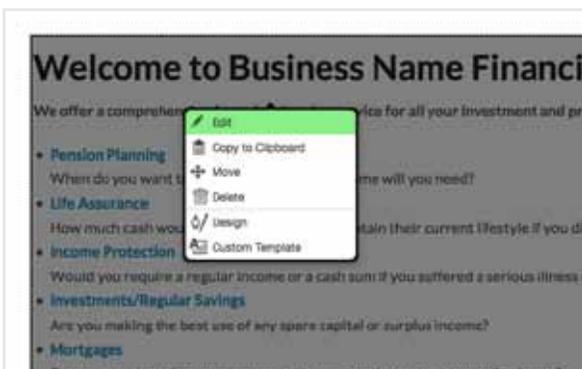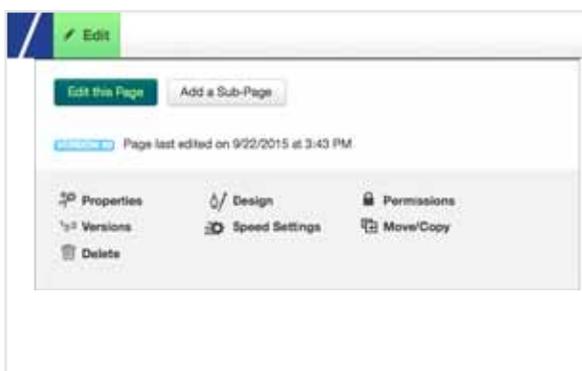
1/ Navigate to the page you wish to add a block to

2/ Hover your mouse over the '*Edit*' link in the editing toolbar at the top of the site

3/ In the dropdown click on '*Edit this Page*'

4/ You will now be presented with the various '*Areas*' in which you can place your content. Areas are clearly marked with a thin dotted line

5/ Click on the desired area and choose '*Add Block*'

6/ From the list choose your block type and configure the block as per the required inputs

7/ Once you have finished click '*Add*' at the bottom of the window

8/ This will temporarily add the block to the page, to make this permanent you will need to publish your edits

9/ Hover your mouse over the '*Editing*' button in the editing toolbar at the top of the site and click '*Publish My Edits*'.

Top Tip: Each block has different options; for further information please refer to the specific guide relating to the block.

As well as adding your own new blocks, you can also edit pre-existing blocks just as easily.

1/ Navigate to the page with the block that you wish to edit

2/ Hover your mouse over the '*Edit*' link in the editing toolbar at the top of the site

3/ In the dropdown click on '*Edit this Page*'

4/ Locate and click the block on the page

5/ From the options select '*Edit*'

6/ Configure the block as necessary

7/ Once you have finished click '*Save*' at the bottom of the window

8/ To make these changes permanent you will need to hover your mouse over the '*Editing*' button in the editing toolbar at the top of the site and click '*Publish My Edits*'.

Top Tip: Each block has different options; for further information please refer to the specific guide relating to the block.
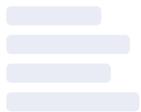
If you no longer need a particular block of content on your page then you can delete this from the site.
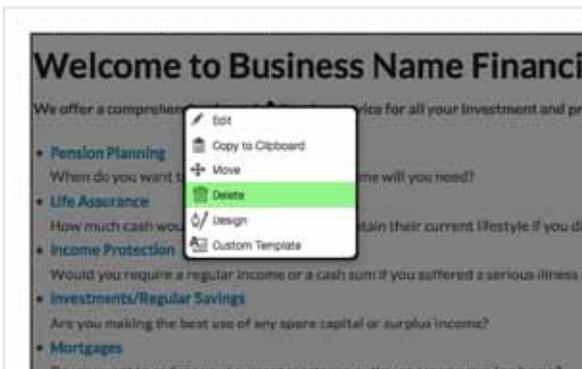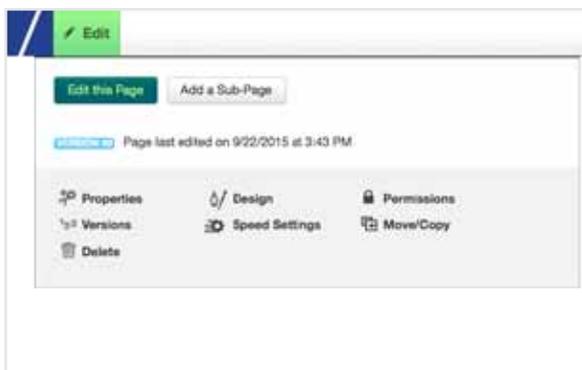
1/ Navigate to the page with the block that you wish to delete

2/ Hover your mouse over the '*Edit*' link in the editing toolbar at the top of the site

3/ In the dropdown click on '*Edit this Page*'

4/ Locate and click the block on the page

5/ From the options select '*Delete*'

6/ Confirm by clicking '*OK*'

7/ To make these changes permanent you will need to hover your mouse over the '*Editing*' button in the editing toolbar at the top of the site and click '*Publish My Edits*'.

Top Tip: Each block has different options; for further information please refer to the specific guide relating to the block.

Blocks can be moved around the pages of your site. They can also be copied to other pages.
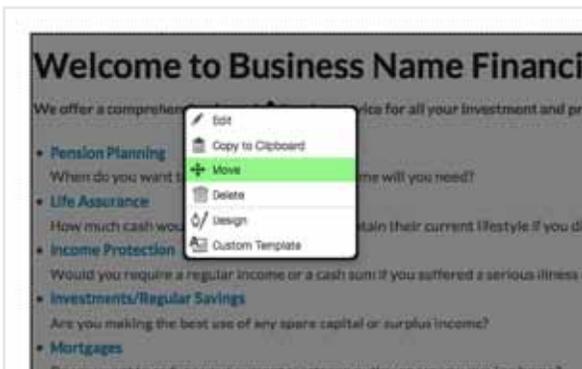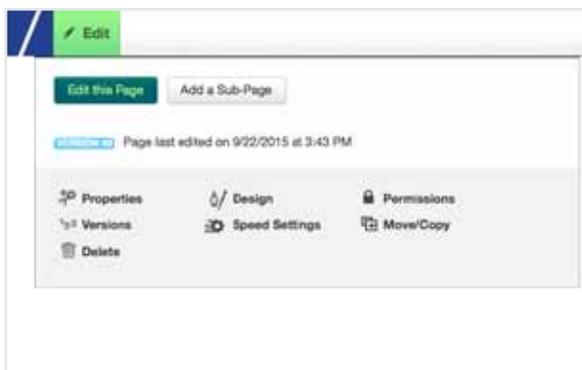
1/ Navigate to the page with the block that you wish to move

2/ Hover your mouse over the '*Edit*' link in the editing toolbar at the top of the site

3/ In the dropdown click on '*Edit this Page*'

4/ Locate and click the block on the page

5/ From the options select '*Move*'

6/ Simply '*Click*' and '*Hold Down*' your mouse button when hovering the block and then drag to the desired location on the page and then '*Release*' the mouse button

7/ To make these changes permanent you will need to hover your mouse over the '*Editing*' button in the editing toolbar at the top of the site and click '*Publish My Edits*'.

Top Tip: You can now drag and drop your block above or below other content in the same area or even to a completely different area.

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