



Setting up a Custom Dashboard Pod linking to your own Website Blog

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Change Control History

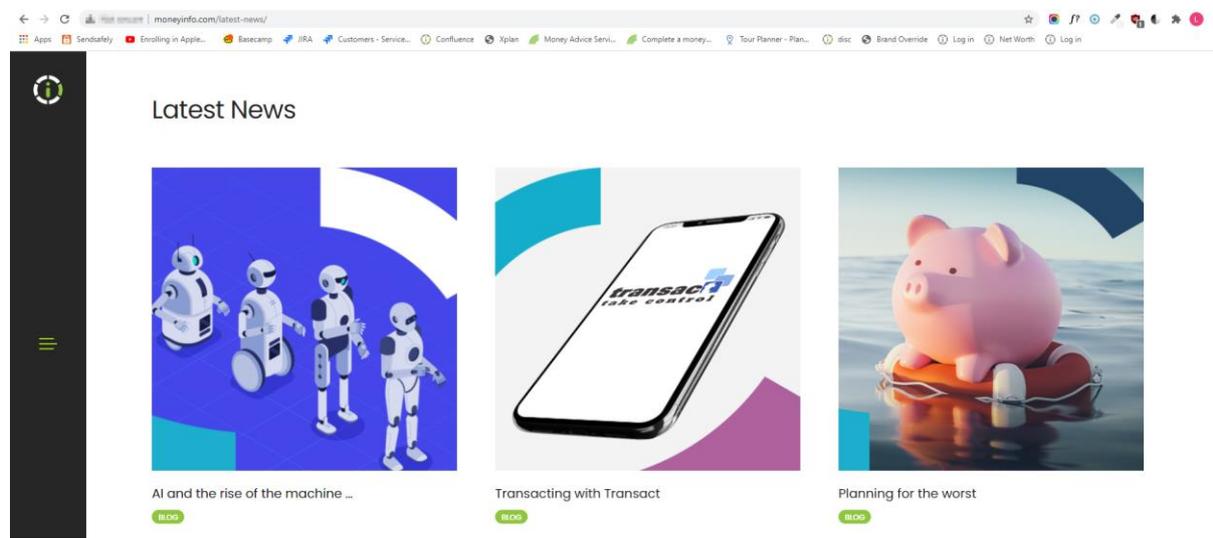
Version	Author	Date	Details	Reviewed by / Issued to
1.0	LW	September 2020	Initial Release	LW/All firms

Introduction

If you want to give your clients access to your own website News, Blogs or other updates rather than creating this content in both moneyinfo and on your website you could consider having a dashboard pod that links moneyinfo to your own website.



This link would take the client to the moneyinfo.com/latest-news



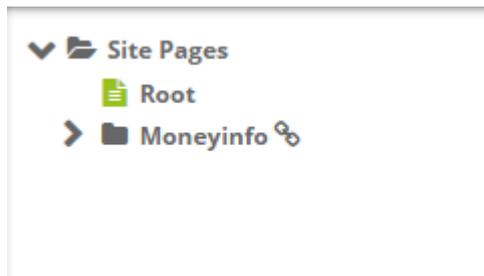
Setting up the content

From your Dashboard in moneyinfo Manager (MIM), click on Action>Content Management.

The screenshot shows the moneyinfo Manager interface. On the left is a navigation menu with items like Dashboard, Clients, Activities, Organisation, Logs, System, MI, Import, Settings, Exports, and Help. The main area displays a dashboard for 'moneyinfo Exclusive Demo' with statistics for 'Total MoneyInfo clients' (47) and 'Total clients with login' (36). Below this is a table with columns: Name, Type, Children, Clients, Logged In, and Banking. The table lists various client segments like 'Balanced Strategy', 'Adventurous Strategy', 'Active Income Strategy', etc. An 'Actions' button is visible next to the 'Active Income Strategy' row.

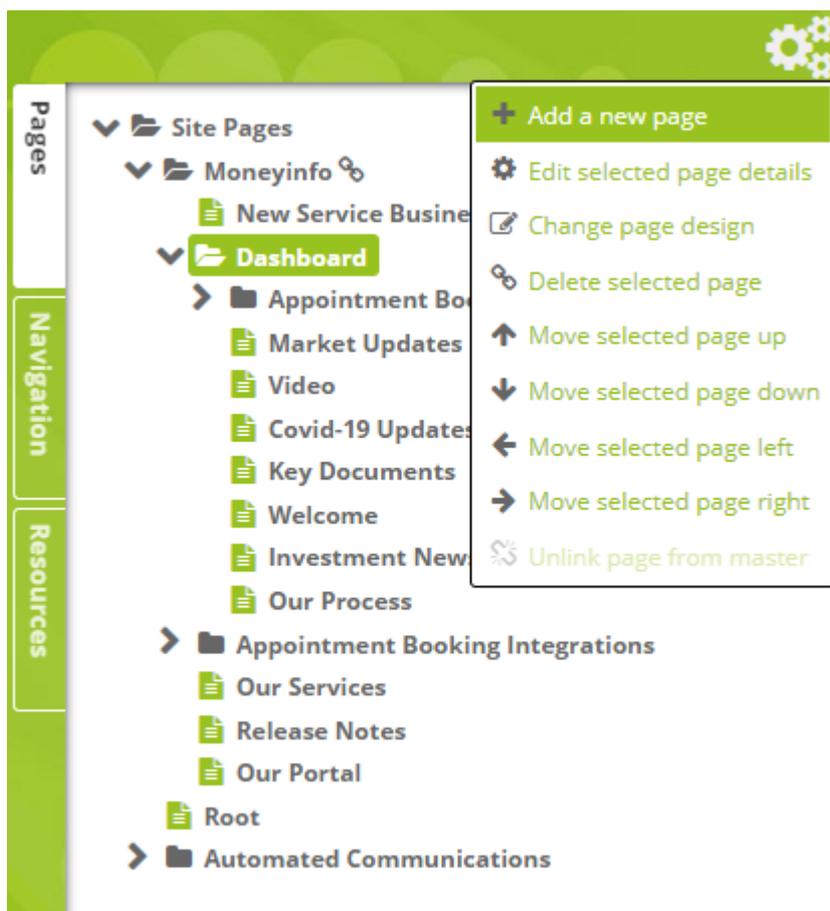
This image shows a close-up of the 'Actions' dropdown menu. The menu is open, showing several options: Edit Company, Content Management, Create Notification, Manage Notifications, Send Message, Upload Document, View Provider Links, Clear Cache, Generate Bulk Logins, and Reset Dashboard Layout. The 'Content Management' option is highlighted, indicating it is the selected action.

Choose the most recent Content Site version, or create a new one if you want to set this up in advance of making it available to all clients. Click the link



If you haven't got a Dashboard option you will need to add this as a new page.

To do this you can click the cogs, then add a new page and choose the Dashboard pod option, but change the name to Dashboard.



Next you want to create a new Dashboard Pod that will contain your image and link to your News or Blog content. Click the cogs again and + add a new page, choose Dashboard Pod from the left hand menu of templates.

Name the Pod 'Document Library', or 'Key Documents', or 'Important Documents' – something of your choice. Click Save.

(for now it will say Custom Content – this will be changed in the moneyinfo Settings later on in the document)

Add New Page ✕

Templates

Name Show in navigation

Content

Preview

- ▼ Page Layout
 - Automated Comms Email
 - Dashboard pod**
 - Email - 3 Column
 - Html fragment
 - Layout 1 - Box
 - Layout 2 - Box
 - Layout 3 - Grid
 - Layout 4 - Images
 - Layout 5 - Videos
 - Layout 6 - Simple
 - Layout 7 - Grid
 - Layout 8 - Grid (3x3)
 - MI Welcome Content
 - Text page
 - Video Feed
 - Video Feed
- ▼ Master Pages
 - Moneyinfo

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed eget imperdiet eros. Proin dignissim cursus facilisis. Praesent risus tellus, rhoncus eu nulla a, auctor aliquet ipsum. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque lacinia trincidunt orci, vitae semper libero luctus vel. Ut at sagittis eros. Donec sit amet finibus mauris. Morbi egestas est ut nibh pellentesque tristique. Quisque ultrices vitae mi at maximus. In maximus massa in risus scelerisque ullamcorper.

Save
Cancel

Home
✉ 4
⚠ 4
Me
? Help
 Log Out

Viewing as Tess ⚙

Managed Portfolio

Total Valuation **£879,738**

Custom Content

Net Worth

£2,514,535

I own

I'm worth **£2,177,917**

I owe **£336,617**

Portfolio Split

Gilts & Bonds (2.87%)	£25,250
Hedge Funds (1.13%)	£9,929
Unit Trusts & OEICS (22.28%)	£196,048
ISAs (20.51%)	£180,395
Pensions (51.96%)	£457,117
Private Equities (1.25%)	£11,000

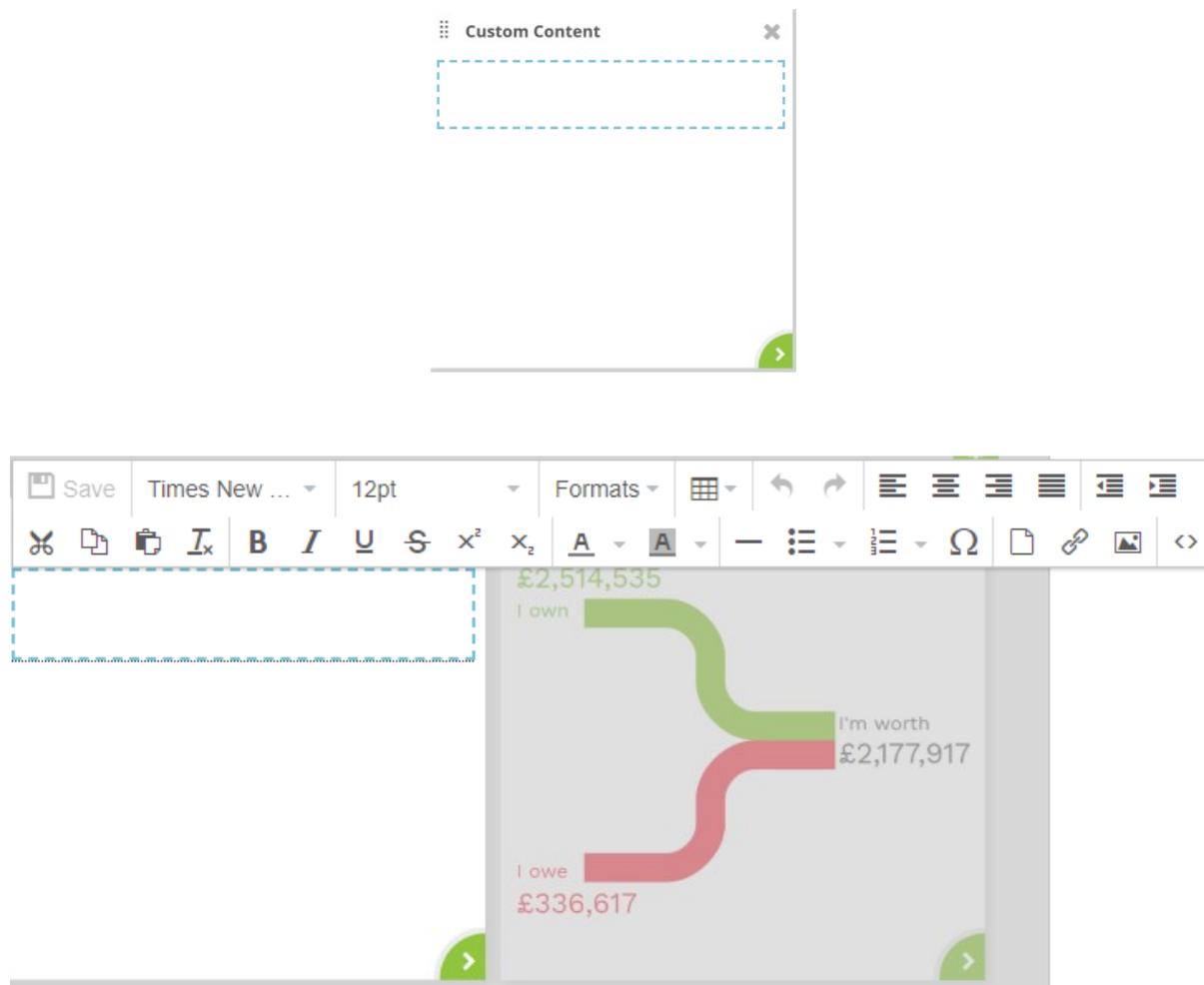
Asset Allocation

£879,738

Portfolio

Recent Documents

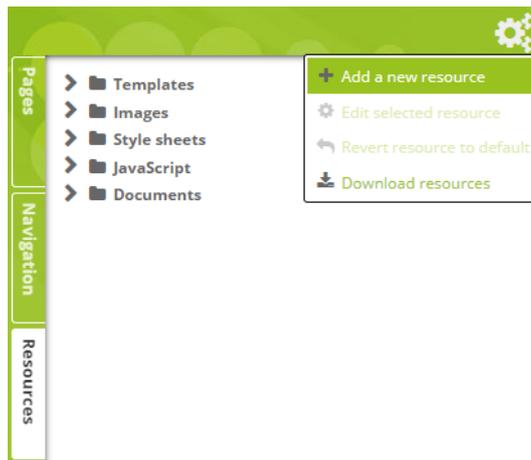
- School Fees Planning Sched... 02/04/2020
- Acme Advisers Client Agree... 02/04/2020
- segon-platform-investor-pr... 01/04/2020
- excel document upload TEST... 01/04/2020
- Meeting Notes.pdf 31/03/2020
- Meeting Notes.pdf 31/03/2020
- Your Review Pack January 20... 30/03/2020



This pod is ready to have the key documents added....

Adding an Image to your Dashboard Pod

Click on Resources down the right hand side and then click the Cogs, select 'Add a new resource'



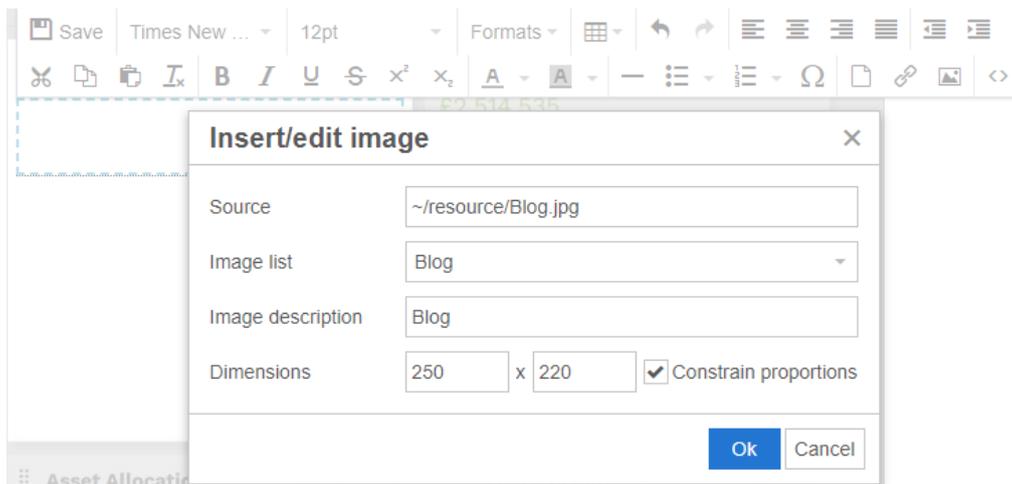
Locate your chosen image that you have saved in your own location using the Import button, then click Save.



Once you've added your resources, you can then add these to your custom pod. Navigate to the Pages section on the left hand side. Click into your Custom Content Pod, click the Add Image



Locate the Image from the Image List – we called ours Blog.



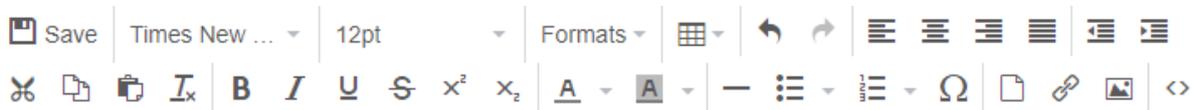
Complete the Box as follows – some boxes will pre-populate – in which case, leave them as they are. Dependent on how large you want the image you may need to adjust the dimensions, we've used 250x220 which is a good start.

When you click OK you'll see the image has been added



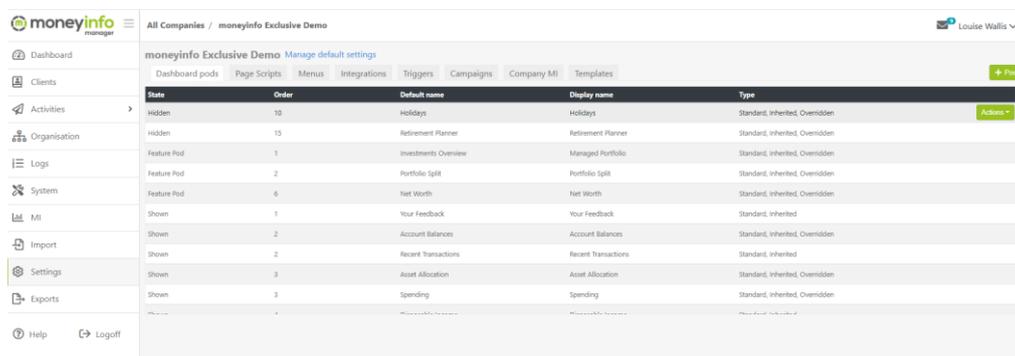


Click Save in the toolbar



Creating the Pod in MIM

Go to Settings



Click on + Pod, give your Pod a name – we’ve used ‘News & Blogs’, pick the order number of where you want it to appear on the Dashboard, and whether it should be shown or minimised (so the client has to add it themselves).

Add new dashboard pod ✕

Basic

Module access

Permissions

Type Custom

Name News & Blogs

Order 8

State Minimised

Description (For pod tray) Hidden

Style (For pod tray) Shown

Content URL

Destination URL Type CMS

Mobile destination URL Type CMS

Save Cancel

You need to add the content link to tell moneyinfo Manager where to pick up the image/pod content and then where to navigate to when clicking on ‘more’. In this example it will be as follows:

Edit custom dashboard pod ✕

Basic	Type	<input type="text" value="Custom"/>	
Module access	Name	<input type="text" value="News & Blogs"/>	
Permissions	Order	<input type="text" value="8"/>	
Config	State	<input type="text" value="Minimised"/>	
	Description (For pod tray)	<input type="text" value="A link to our Blogs & New"/>	
	Style (For pod tray)	<input type="text" value="#A9D823"/>	
	Content	URL <input type="text" value="moneyinfo/dashboard/newsandblogs"/>	Type <input type="text" value="CMS"/>
	Destination	URL <input type="text" value="https://www.moneyinfo.com/latest-new"/>	Type <input type="text" value="External"/>
	Mobile destination	URL <input type="text" value="https://www.moneyinfo.com/latest-new"/>	Type <input type="text" value="External"/>

Adding the Pod to a Client

If you want to see the pod you can 'Auto Login' to a client by clicking Action>Manage then click the Cog (sometimes called the Pod Drawer).



Drag the pod from the tray to add it to your dashboard. ✕

Important Documents
Important and up to date Documents can be accessed here

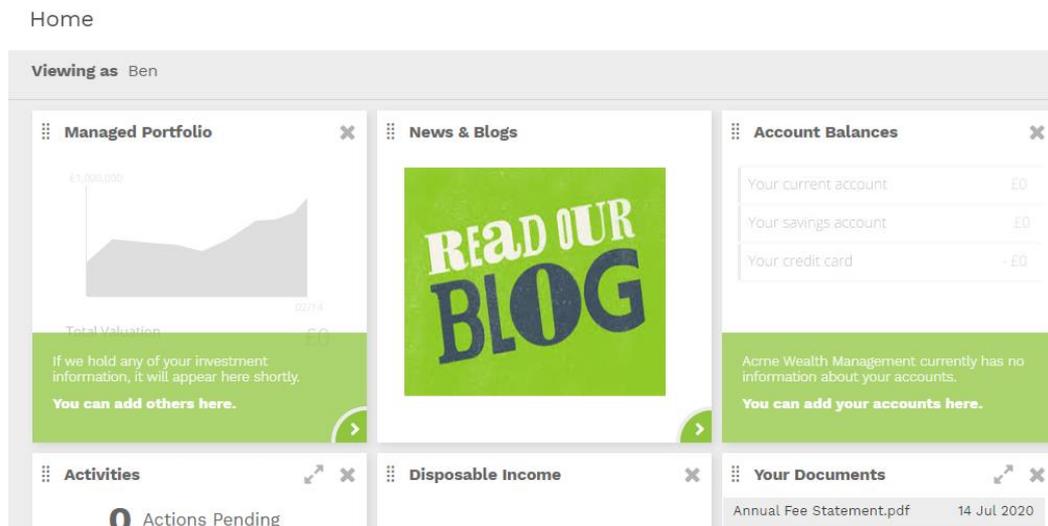
Market Updates

Contact Details
Find our contact details here

Investments Update
The increase or decrease in your portfolio valuations

News & Blogs
A link to our Blogs & News

Find the Content Pod that you named earlier – we used 'News & Blogs'. Drag and drop this into the Dashboard and you'll see the result!



If you need any help or support setting up your custom content please contact the moneyinfo support team on 03303 600300 or email support@moneyinfo.com