

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

Date: Author: Version:

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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.





The markets are changing constantly, and here we share our views and insight...

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.

	All Companies / moneyin	Companies / moneyinfo Exclusive Demo						🔊 Louis	ie Wallis 🗸	
Dashboard	Name	moneyinfo Exclusive								
Lients	Total MoneyInfo clients Total clients with login	47 36								
Activities	Service Groups Teams									+ Group
Organisation	Name			Туре		Children	Clients	Logged In	Banking	
i= Logs	Balanced Strategy			Client Segment		0	5	4	2	
1_ cogo	Adventurous Strategy			Client Segment		0	4	3	1	
💥 System	Active Income Strategy			Client Segment		0	1	1	0	Actions -
<u>Int</u> MI	Business Owners			Client Segment		0	2	1	0	
D Invest	Brochure Clients			Client Segment		0	2	2	2	
현 Import	DFM/Investment Management			Client Segment		0	2	1	1	
Settings	Transactional Clients			Client Segment		0	0	0	0	
Exports	Retirees			Client Segment		0	6	3	1	
	Balanced Managed Clients			Client Category		0	0	0	0	
⑦ Help C→ Logoff										

Name	moneyin Demo	fo Exclusive	Actions -	
Total MoneyInfo clients Total clients with login	47 × 36	Edit Company Content Manage	ement	
Service Groups Teams	+	Create Notificati	on	
Name	ίΞ	Manage Notifica	tions	
Balanced Strategy		i Send Message		
Adventurous Strategy	È	Upload Docume	nt	
Active Income Strategy	ۍ ډ	Clear Cache		
Business Owners	A	Generate Bulk Lo	ogins	
Brochure Clients	5	Reset Dashboard	l Layout	

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



Edit Compar	ny CMS		×				
CMS details	Service Url	https://manager.ifanetsite.com/Services/IntegrationService	e.svc				
CMS Content	Site Domains	exclusive.ifanetsite.com					
	Site Name	Moneyinfo Exclusive Demos					
	Site Versions						
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	Site Changes 08-Jun-2020 10:31	08-Jun-2020 10:37	Create				
		Save	Cancel				

This will launch the Content Management site that we call Netsite. You will see a folder structure similar to the one below (albeit maybe with less items).



As a minimum you will need the following structure



💙 🗁 Site Pages						
🖹 Root 🖒 🖿 Moneyinfo 🗞						

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	News & Blogs	Show in navigation 🗆
∨ ► Page Layout	Content	MI Content	~
Automated Comms Email Dashboard pod	Preview		
🖹 Email - 3 Column 🖹 Html fragment	Lorem ipsum dolor sit amet dolor sit amet, consectetur a tristique. Quisque ultrices v	, consectetur adipiscing elit. Sed eget imperdiet eros. Proin dignissi idipiscing elit. Quisque lacinia tincidunt orci, vitae semper libero lu itae mi at maximus. In maximus massa in risus scelerisque ullamco	n cursus facilisis. Praesent risus tellus, rhoncus eu nulla a, auctor aliquet ipsam. Lorem ipsam tus vel. Ut at sagittis eros. Donec sit amet finibus mauris. Morbi egestas est ut nibh pellentesque per.
Layout 1 - Box			
Layout 3 - Grid			
🗎 Layout 4 - Images 🖹 Layout 5 - Videos			
불 Layout 6 - Simple 🖹 Layout 7 - Grid			
Layout 8 - Grid (3x3)			
Text page			
i Video Feed			
 ✓ ► Master Pages ➤ ■ Moneyinfo % 			
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Home			≥3	A Me O	Help 🕩 Log
Viewing as Tess 📴					
ii Managed Portfolio	2.8	II Custom Content	×	Net Worth £2,514,535	I'm worth
tore Total Valuation	otsco £879,738 ∕∕		۵	i owe £336,617	£2,177,917
ii Portfolio Split	0 2 X	ii Asset Allocation	0 2 x	I Recent Documents	27 ×
Gilts & Bonds (2.87%)	£25,250			School Fees Planning Sched	. 02/04/2020
Hedge Funds (1.13%)	£9,929			Acme Advisers Client Agree	02/04/2020
Unit Trusts & OEICS (22.28%)	£196,048			aegon-platform-investor-pr.	. 01/04/2020
ISAs (20.51%)	£180,395	£879.738		excel document upload TEST	01/04/2020
Pensions (51.96%)	£457,117	Portfolio		Meeting Notes.pdf	31/03/2020
Private Equities (1.25%)	£11,000			Meeting Notes.pdf	31/03/2020
				Your Review Pack January 20.	





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.

Name Resource type	Blog.jpg Image	•	Import
Resource type	Image	~	Import
	READ IUR BLOG		

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.





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ж 🗅	t Ix	B <i>I</i> ⊻ S ×	$x^2 \times_2 \underline{A} - \underline{A} - \underline{B} - \underline{B} - \underline{B} - \underline{C}$	2 🗅 🖉 📧 🗘
 		Insert/edit imag	ge	×
		Source	~/resource/Blog.jpg	
		Image list	Blog	•
		Image description	Blog	
		Dimensions	250 x 220 Constrain propor	tions
II Asset A	Allocatic		Ok Ca	ncel

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





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	Viewing as Tess 🔽					
•	ii Managed Portfolio	2.8	ii Custom Content	×	Net Worth £2,514,535	×
89 11			READ OUR			l'm worth £2,177,917
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66	Unit Trusts & OEICS (22.28%)	£196,048			aegon-platform-investor-pr.	01/04/2020
**	ISAs (20.51%)	£180,395	£879.738		excel document upload TEST	01/04/2020
P	Pensions (51.96%)	£457,117	Portfolio		Meeting Notes.pdf	31/03/2020

Click Save in the toolbar





Creating the Pod in MIM

Go to Settings

	All Companies / moneylnfo Exclusive Demo 🜌 Lo								
Dashboard	moneyinfo Exclu	oneyinfo Exclusive Demo Manage default settings							
Clients	Dashboard pods	Page Scripts Menus	Integrations Triggers	Campaigns Comp	any MI Templates		+ Pod		
	State	Order	Default name		Display name	Туре	í de la compañía de la		
Activities	Hidden	10	Holidays	olidays Holidays Standard, Inherited, Overridden			Actions -		
Organisation	Hidden	15	Retirement Pla	nner	Retirement Planner	Standard, Inherited, Overridden			
I= Loss	Feature Pod	1	Investments O	verview	Managed Portfolio	Standard, Inherited, Overridden			
1= 00g5	Feature Pod	2			Portfolio Split	Standard, Inherited, Overridden			
💸 System	Feature Pod	6	Net Worth		Net Worth	Standard, Inherited, Overridden			
al MI	Shown	1	Your Feedback		Your Feedback	Standard, Inherited			
D Innert	Shown	2	Account Balan	oes	Account Balances	Standard, Inherited, Overridden			
- Import	Shown	2	Recent Transac	tions	Recent Transactions	Standard, inherited			
Settings	Shown	3	Asset Allocatio	n	Asset Allocation	Standard, Inherited, Overridden			
- Exports	Shown	3	Spending		Spending	Standard, Inherited, Overridden			
			e		ni	Manufact Interview	*		
⑦ Help C→ Logoff									

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 das	shboard pod				×
Basic	Туре	Custom			~
Module access	Name	News & Blogs			
Permissions	Order	8			
	State	Minimised			~
	Description (For pod tray)	Hidden			
	Style (For pod tray)	Shown			
	Content	Minimised	iyhe	0110	-
	Destination	URL	Туре	CMS	~
	Mobile destination	URL	Туре	CMS	~
		s	ave	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	Туре	Custom				~
Module access	Name	News & Blogs				
Permissions	Order	8				
Config	State	Minimised				~
	Description (For pod tray)	A link to our Blogs & New				
	Style (For pod tray)	#A9D823				-
	Content	URL	moneyinfo/dashboard/newsandblogs	Туре	CMS	~
	Destination	URL	https://www.moneyinfo.com/latest-new	Туре	External	~
	Mobile destination	URL	https://www.moneyinfo.com/latest-new	Туре	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).

0
Trag 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 <u>support@moneyinfo.com</u>