Setting up a Custom Dashboard Pod

linking to your own Website Blog

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Contents

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.

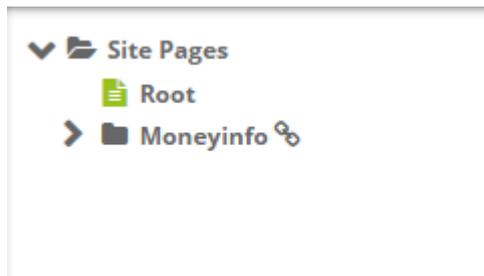This link would take the client to the moneyinfo.com/latest-news
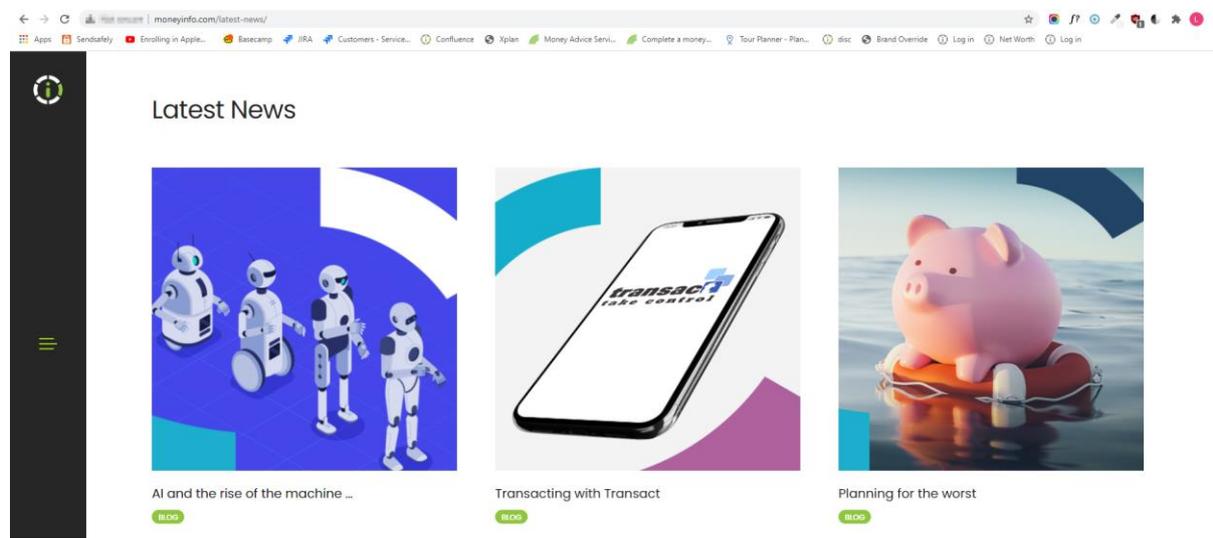
Setting up the content

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

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

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

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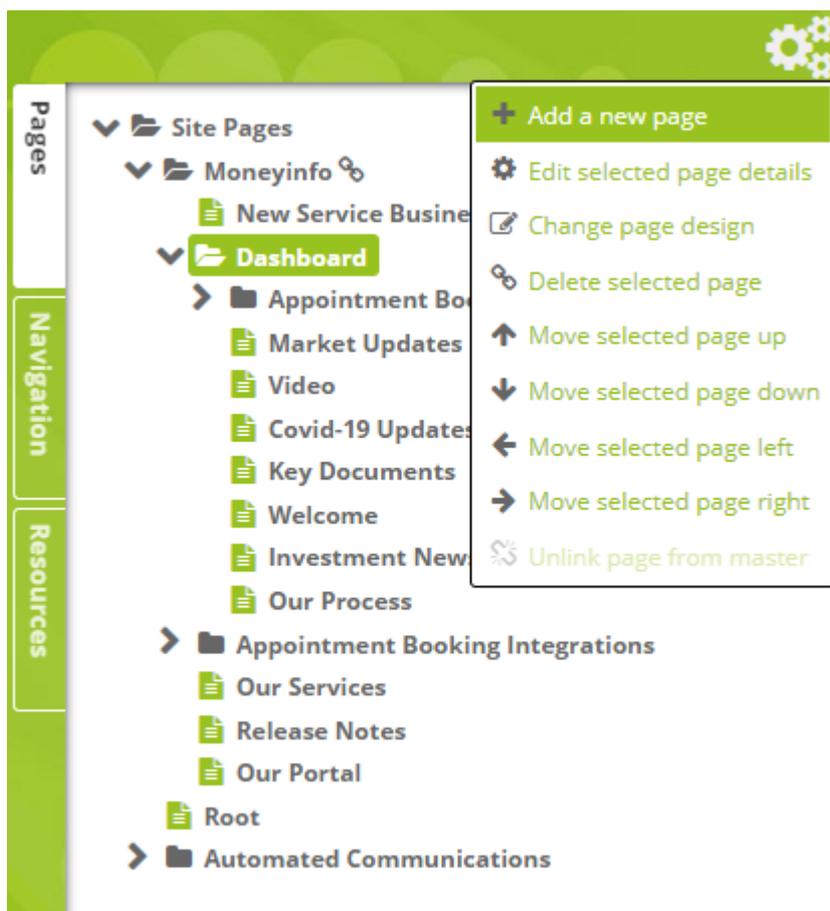
Next you want to create a new Dashboard Pod that will contain your image and link to your News or Blog content. Click the cogs again and + add a new page, choose Dashboard Pod from the left hand menu of templates.

moneyinfo

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)

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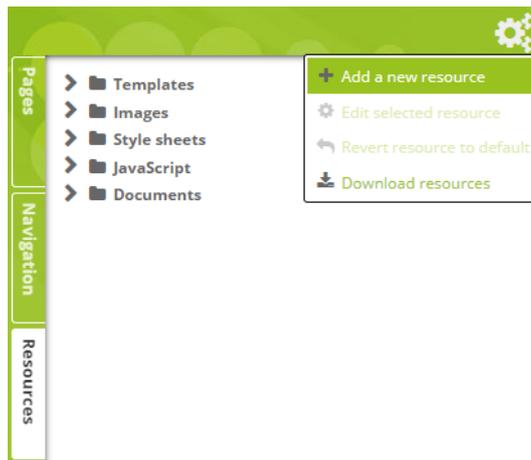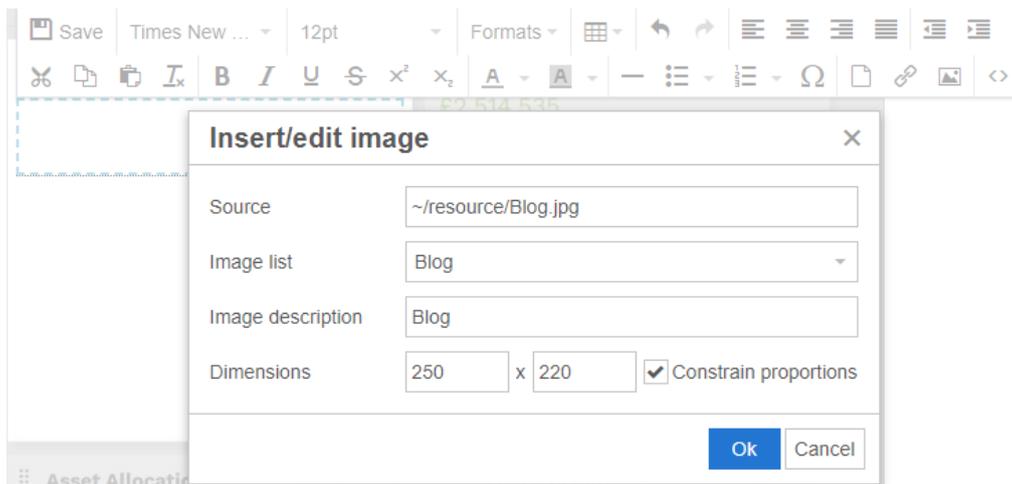
Locate your chosen image that you have saved in your own location using the Import button, then click Save.

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

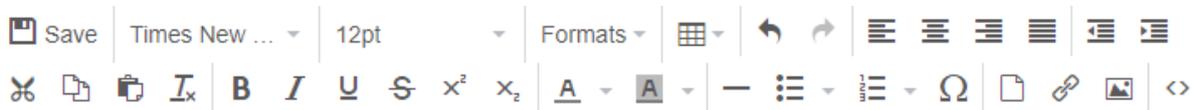Locate the Image from the Image List – we called ours Blog.

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.

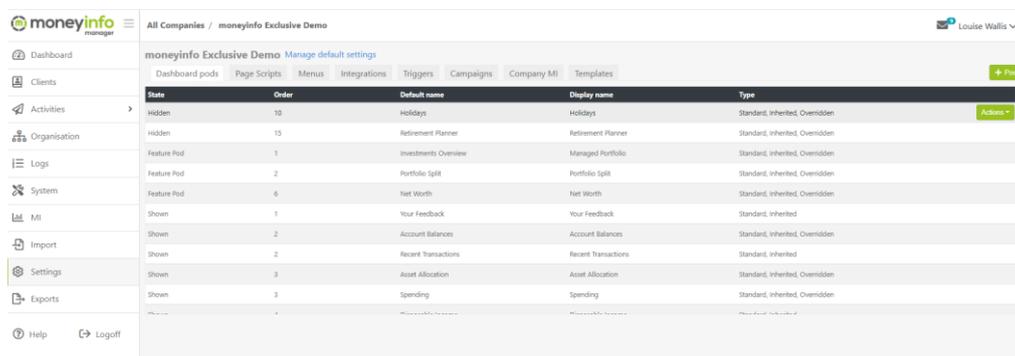When you click OK you'll see the image has been added

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).

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:

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).

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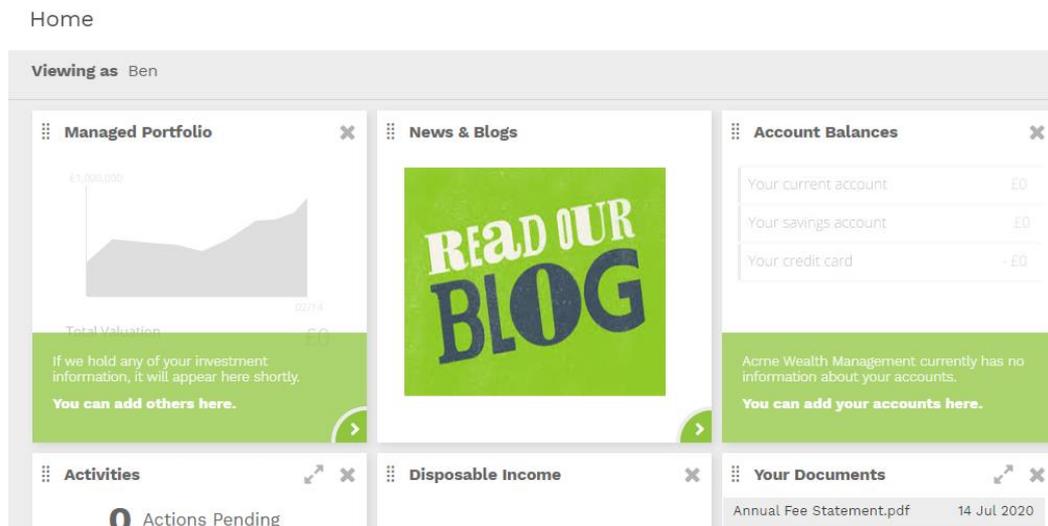
If you need any help or support setting up your custom content please contact the moneyinfo support team on 03303 600300 or email support@moneyinfo.com