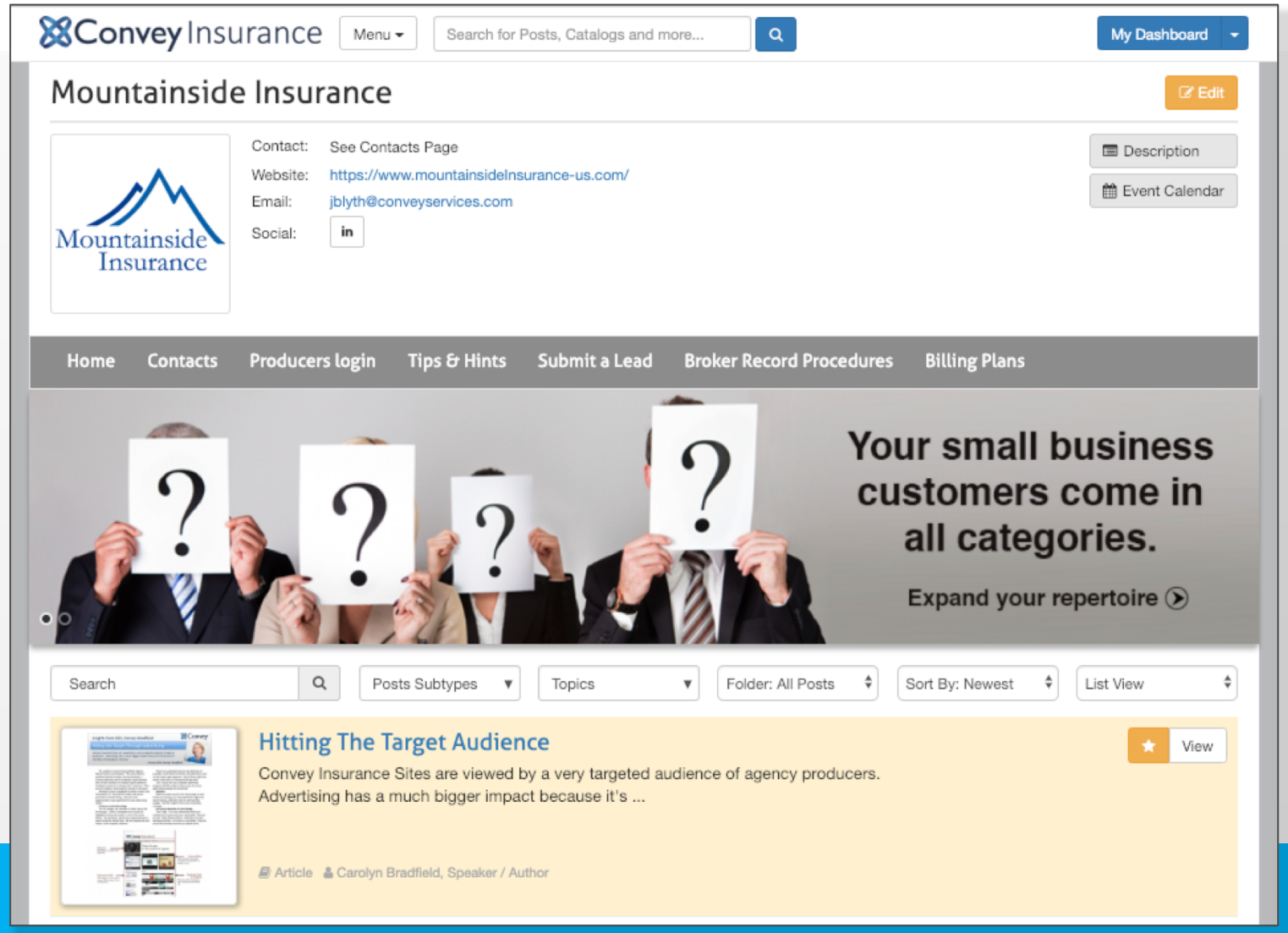
Convey Services

Catalog Overview

Catalog best practices and instructions on posting content

Catalog Front End

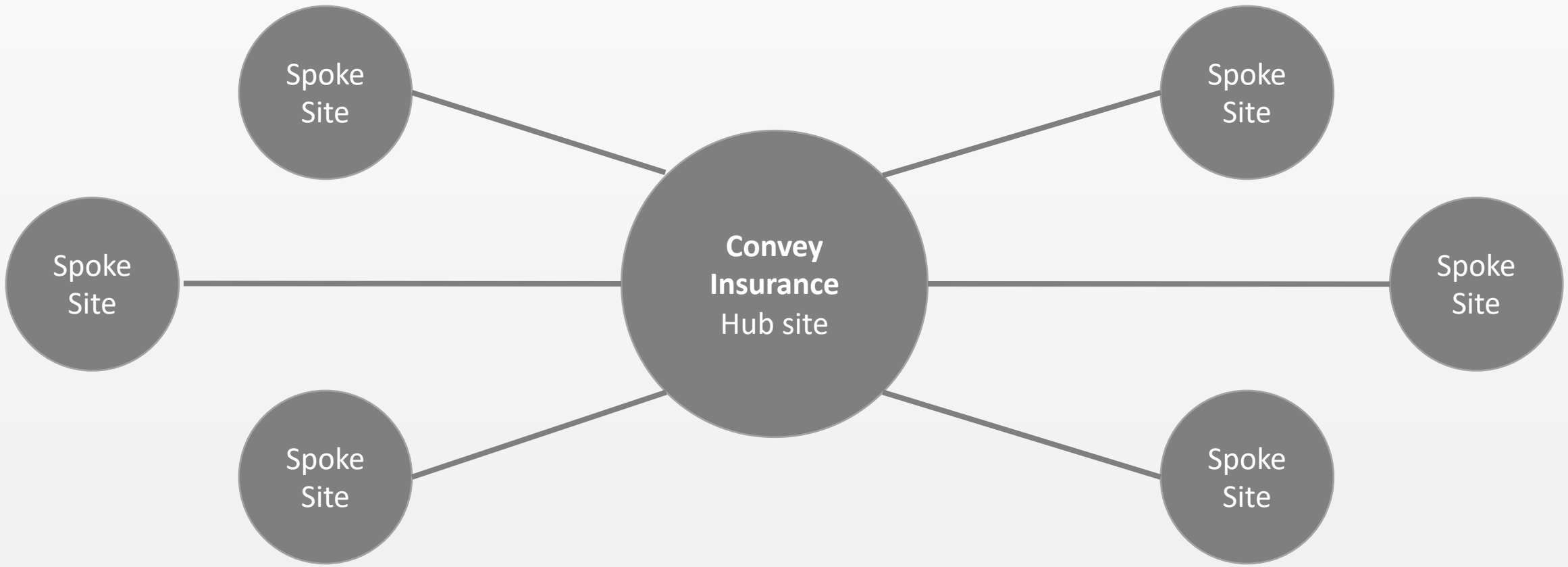
The way your catalog looks to visitors



Your catalog consist of your logo, header contact information, navigation bar with pages, informational banners, and content posts.

Hub & Spoke*

Each function when managing posts or the catalog has a unique table to select where your content goes

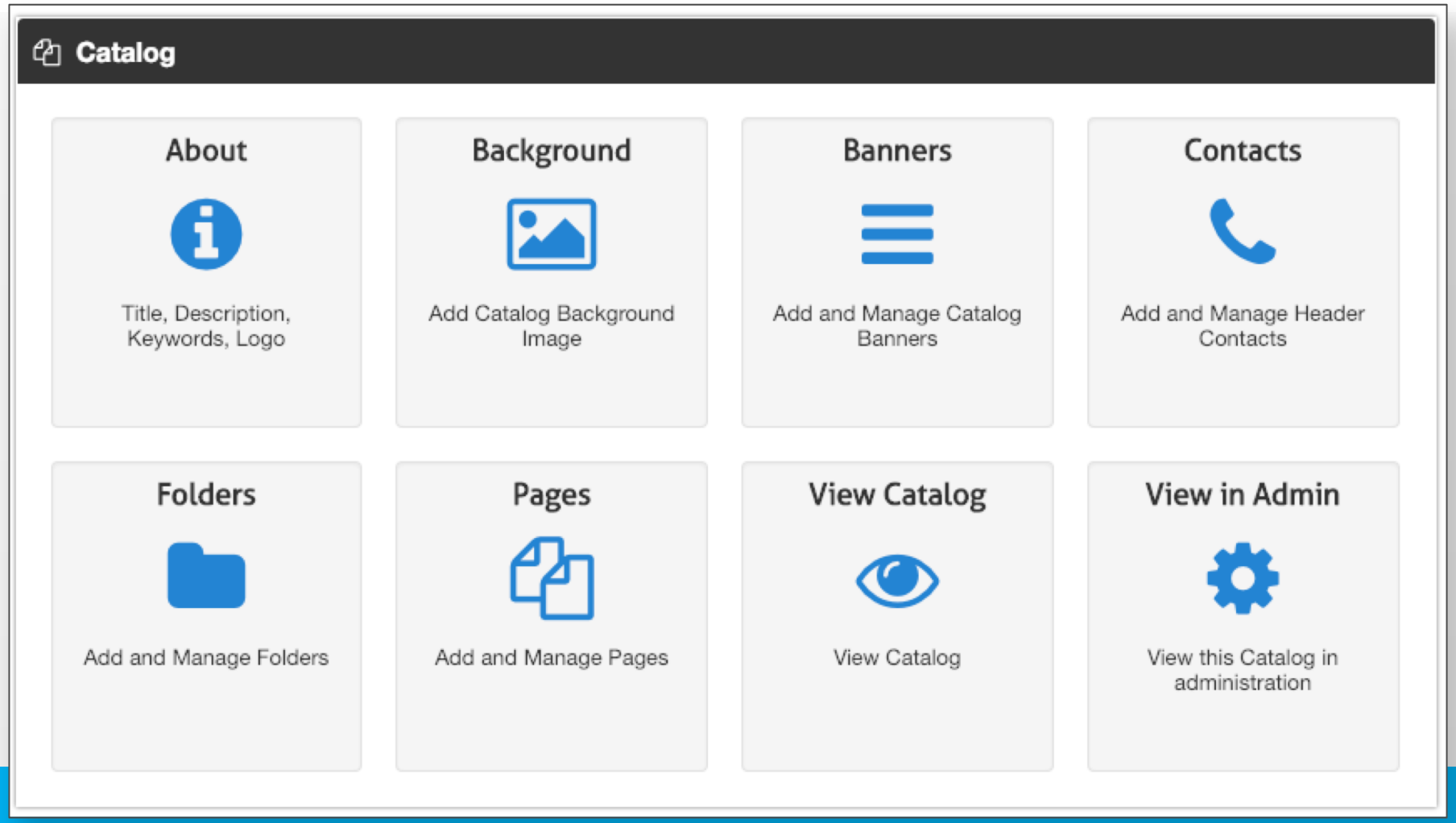


Keep an eye out for any table of spoke sites. We know that your information is not always one size fits all, that's why we allow you to distribute content where it needs to go and nowhere else.

**Spoke – A specific agency partnership's Convey Portal*

Catalog Back End

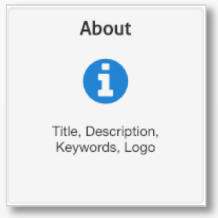
The administrative side for managing the catalog



In your dashboard you have several tiles that edit each aspect of your catalog

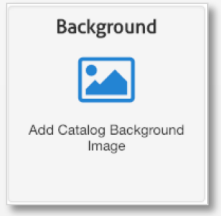
Managing Your Catalog

Each tile in your dashboard has a unique function for managing the catalog



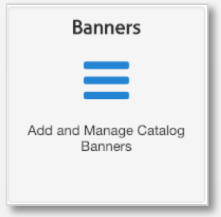
About

This section allows you to manage the name of your catalog, keywords for site search, catalog description, as well as the logo that is displayed on the front end.



Background

Change the background of your catalog to better match your company's branding. The default background is the same as the site background the catalog is viewed on.



Banners

Banners can link to pages, posts, or external sites. Banners can be scheduled and are a powerful tool to highlight important information.

Contacts

This information is displayed in the header, it can be generic or specific to a person in your organization. Most catalogs say "See Contacts Page" and viewers of you catalog know to look for a page with multiple people listed.

Folders

Folder help organize content into more manageable sections. A folder structure has already been set up for the site and should encompass most post types.

Pages

Create your own web pages to be displayed on your catalog. Pages can contain forms to help gather information. You do not need to know special HTML code, the editor is easy to use and user-friendly. This is where you add Contact pages for each spoke site if needed.

Posting

Creating content is easy, under the post tab you can select multiple types of posts*

There are 3 Main Post Types – and the posting process is similar for each

Content

• An uploaded file that is viewed on the site. The post can be downloaded or email shared. The post icon is a custom thumbnail or screenshot of the file.

• Posts that are created on the site, where the viewed information is NOT an uploaded file but is created similar to a web page or Microsoft Word document. But, a file can be attached for download, like a large Excel file.

Event

Live Webinar, Audio Conference Call, In-person Event.

Blog

Informal journal-style text entries designed to convey insight into your business or share your company's views.

Posts are the most important part of your catalog. Be sure to make sure that your catalog includes all of the information possible that the agencies might want from you.

**Post - Content added to your catalog, which can be almost any file type including video. It's viewed in a document viewer, and can be downloaded, or email shared if you allow.*

Creating a Post

The posting wizard is one step and very user friendly

Subtype

Selecting a subtype tells the agencies what it is, appetite guide, promotion, etc. Some spoke sites have automated directories that include the subtype you choose.

Title & Subtitle

Enter a title and subtitle to label your post appropriately.

Keywords

These terms can help agencies find you when they search the site.

Description

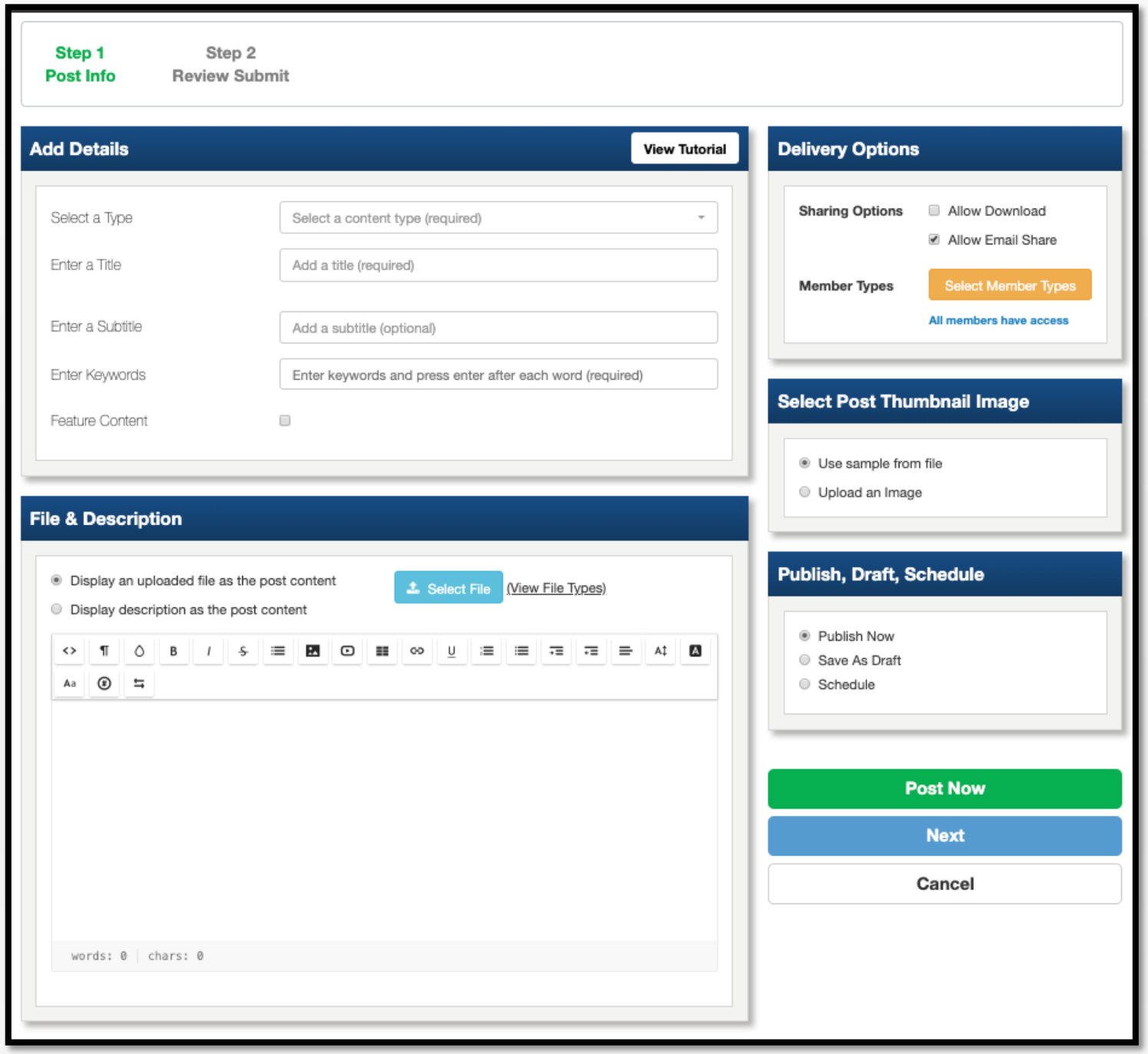
This section, like keywords help agencies know what your content is and also help them find it in search.

Delivery Options

Select the spoke sites the content will post on, as well as the members that are able to view it.

Publish, Draft, Schedule

Add your post, draft it, or schedule the post to appear for specific period of time (Useful for promotions).



Agency Partnership Request

Agency Partnerships want you to update your contacts for their producers

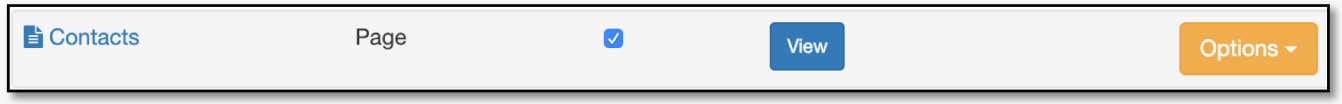
1. Click the “Pages Tile” under the catalog tab in your dashboard.

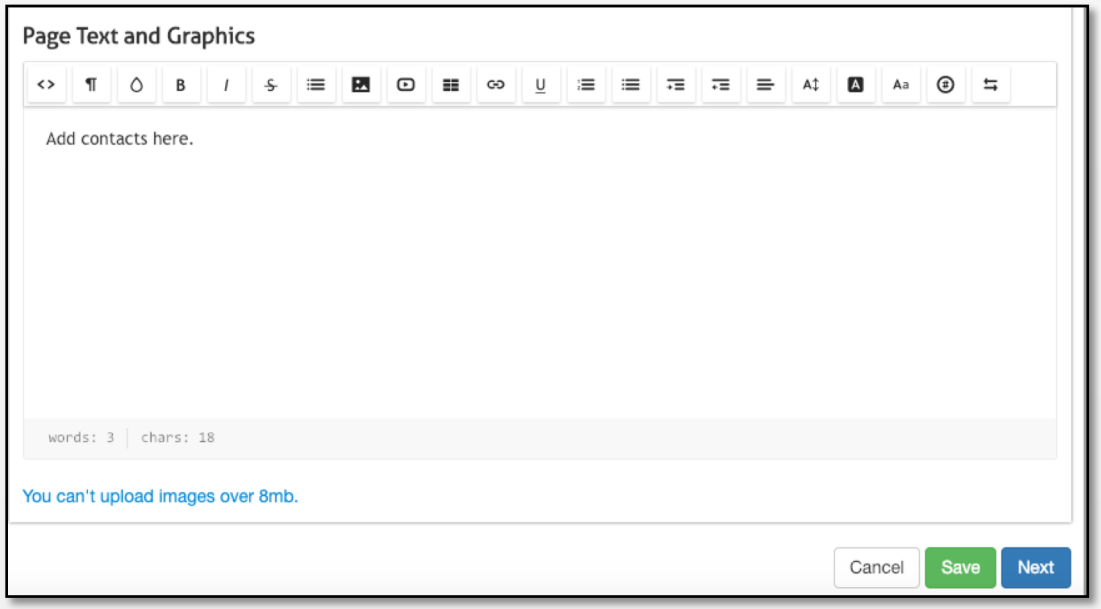
2. To locate the Contacts Page dedicated to the agency Partnership that needs updating. Click the Blue “View Button” to locate the correct Contacts page.

3. After identifying the correct page, click the Orange “Options” Button and select “Edit

4. Copy and Paste or Type in the updated contacts in the Text Editor area.

5. Then, click “Save”.





Need Additional Training?

Contact Support@conveyservices.com