

Catalog Pages

Catalog pages contain graphics, text, forms, videos and links. They can also be directories of posts.

Topics:

How do I locate pages?

How do I add a catalog page?

How do I add subpages?

How do I add page forms?

How do I add a post directory?

How do I select posts for the directory?

Pages	Location	Add Page Step 1	Add Form Step 2	1 - Post Directory	2- Post Directory
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Catalog Pages

Catalog Pages appear above the banners on the catalog home page and allow you to display additional information. Common pages displayed include, "About Us", "Contact Us", and a directory of posts..

The screenshot shows the Convey Services website interface. At the top, there is a navigation menu with the following items: Home, Convey Services, Master Agent Sites, Contact Convey, Convey for Channel, and Submit a Lead. A red oval highlights this menu. Below the navigation menu is a banner with the text "We know all small businesses aren't the same. That's what makes us different." and a "View Special Offers" button. To the right of the banner is a photo of a smiling man in a blue shirt. Below the banner is a section titled "In the Catalog" with a search filter, a "Newest" dropdown, and a "10 per page" dropdown. There are "List View" and "Tile View" buttons. A list of posts is shown, including "Webinar: Upgrades from Convey for Vendors" with a "View" button. On the left side, there is a sidebar with "All Posts" and sub-categories: Catalogs, CEO Insights, Posting, and Tips and Hints.



Pages contain text, graphics, videos, or forms. Post directories display all posts, specific posts, or specific post types in a list or tile view. Hyperlinks can also be created as pages.

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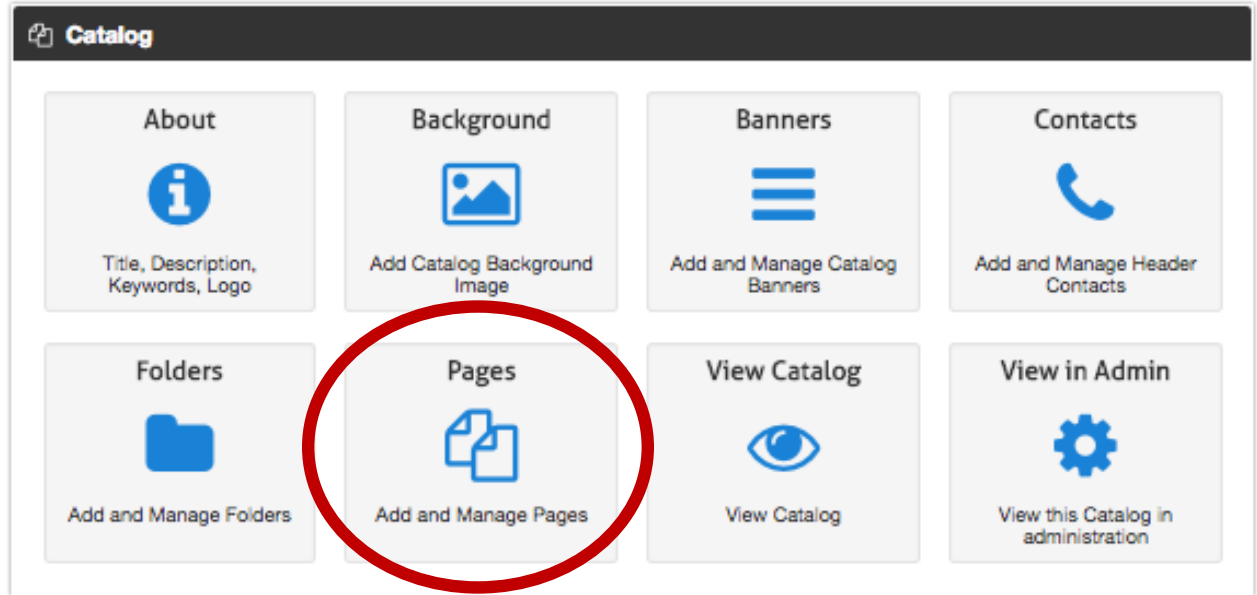
How do I select posts for the directory?

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Catalog Pages

How do I locate pages?

As a site administrator or catalog administrator, select Catalog from your Dashboard, then select Pages.



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Add a Catalog Page

Click Add Page from the left-side navigation. In Step 1, you can add a form to the page, add your page to the navigation bar, make your page a subpage on your navigation bar, have your page open in a new tab when selected, or have your page appear within each catalog navigation bars. Use the text and graphic area to add text, videos, images, and customize you page.

Step 1 Step 2 (Optional) Step 3 (Optional) Step 4
Set up Add Form Select Catalogs Confirm & Save

Select the page options below, add a title and page text, graphics, videos and links. Pages can be added to the navigation menu, locked at the catalog level and can have forms. A page can be a sub-page to appear in another page's navigation bar.

Select	Page Option
<input type="checkbox"/>	Add Page Form
<input type="checkbox"/>	Add to Navigation Bar
<input type="checkbox"/>	Open in New Tab
<input type="checkbox"/>	Subpage

Select	Catalog Option
<input type="checkbox"/>	Add to Catalogs

Page Title

Page Text and Graphics

How do I add a page to the navigation bar?

Click the select box to "Add to Navigation Bar" in Step 1 so the link appears on the home page.

How do create subpages?

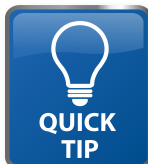
Click the "Subpage" select box and then select the parent page.

How do I have pages open in a separate tab?

Click the select box to open the page in a separate tab.

What is the purpose of the page title?

It serves as the link in the navigation bar.



Use the page options to add a form, add the page to the navigation bar, open it in a new tab or make it a subpage

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Catalog Pages

How do I add page forms?

In step 1 of Add Page, click the "add form" box. In Step 2, create a title and optional instructions. Enter email addresses of individuals you would like to be notified when a form is filled out. Click the "add fields" button to add form fields and indicate if those fields are required and if the label is displayed. Enter a field name, select the type and then click save to add the field. Move the fields up or down or create a second field column by moving them to the right. Add a header to separate the fields. Click Next or Save when finished.

➕ Add a Page Wide Editor

Step 1 Set up **Step 2 (Optional) Add Form** Step 3 (Optional) Select Catalogs Step 4 Confirm & Save

Add a form to this page by entering a title, description, selecting where the form appears on the page and adding email addresses that will receive notification when a form is filled out.

Form Name

Description (Optional)

Form Options

Form Position on Page Left Right Top Bottom

Enter Email Address

Field Name	Field Type	Display	Required	Delete
<input type="text" value="Enter Field Name"/>	<input type="text" value="Select Field Type"/>	<input type="button" value="Hide"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>

What is the form title and description?

The title and description appears before the form fields. The description is optional.

Why do I add emails in form set up?

Add email addresses for individuals to be alerted when a form is filled out.

What field types are available in forms?

Form fields can be text, radio buttons, select boxes, look up fields, number or date and text areas.



Forms create calls to action for viewers. Once a form is filled out, one or more of your team can be alerted by email.

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How do I set up a post directory page?

Select Post Directory from the navigation bar, then in step 1 of the wizard, choose your page options. To display your page publicly, choose Add to Navigation Bar. If you want your page to be a sub page under another existing page, choose Subpage. Populate your page with text, graphics, hyperlinks, etc. in the editor provided. Click Next to proceed to step 2 when finished.

Add a Post Directory Page

Step 1 Set Up (required) Step 2 Display & Types (required) Step 3 Select Catalogs (optional) Step 4 Confirm & Save (required)

Create a post directory page for viewers to search for and find posts. Click to add the page in the navigation bar. Select if this is a parent page or subpage. If this is a subpage, select the parent page. Enter the title and add text, graphics, videos or hyperlinks to the page body.

Select Page Options

Select	Page Option
<input type="checkbox"/>	Add to Navigation Bar
<input type="checkbox"/>	Subpage

Page Title

Page Text and Graphics

<> **B** *I* U

You can't upload images over 8mb.

Cancel Next

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Add a Post Directory Page

Step 1 **Set Up (required)** Step 2 **Display & Types (required)** Step 3 **Select Catalogs (optional)** Step 4 **Confirm & Save (required)**

Select the post information that will display in the directory listing, the thumbnail for the post, and the order the posts will be displayed in. The post title will always appear in each listing. For a "new post directory", enter the number of days from the current date to add posts.

Select Post Information to Display	Thumbnail
<input type="checkbox"/> Post Information	<input checked="" type="radio"/> Post
<input type="checkbox"/> Catalog Name	<input type="radio"/> Catalog
<input type="checkbox"/> Post Type	Display Post Order
<input type="checkbox"/> For Members	<input checked="" type="radio"/> Alphabetically
<input type="checkbox"/> Free or Paid	<input type="radio"/> Date DESC
<input type="checkbox"/> Post Description	<input type="radio"/> Date ASC

Post Created In The Last (optional)

of days

Select post types to appear in the directory. Search for a type and click to select.

Enter post type

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Show records Type

<input checked="" type="checkbox"/> Post Types	Content, Event, Blog, Quick Post
<input checked="" type="checkbox"/> Blog Article	Blog
<input checked="" type="checkbox"/> Account Management	Content
<input checked="" type="checkbox"/> Agreement	Content
<input checked="" type="checkbox"/> Article	Content

In Step 2, select the post information that will be displayed in the directory. Choose a thumbnail for the posts as well as the display order.

Enter the number of days under "Post Created in The Last" to tell the system to look for and display posts created within a specific timeframe.

Select the post types to be displayed using the list provided. Click Next to proceed to the optional Step 3 or Click Save to complete the process.