

# Setting up your Stickyworld Portal

Customer Success Guide: Admin No 1

**Stickyworld**

# Welcome

This guide is designed for anyone setting up a Stickyworld Portal.

It is a short read and split into two easy to digest “How to” chapters taking you through different aspects of the portal setup.

Each “How to” explains the simple steps to take and provides helpful tips.

If you have any feedback on how we can improve the guide please do let us know. You can contact us at anytime on [success@stickyworld.com](mailto:success@stickyworld.com)

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- 1.2 How-to: set up your public home page

# 1.1 How-to: edit Shared Details

# Introduction

**Shared Details includes all the audience-facing information about your organisation, portal and contact information. Editing Shared Details saves you time because the information will be reused in your Public Home page if this is enabled, and also in each of your Rooms.**

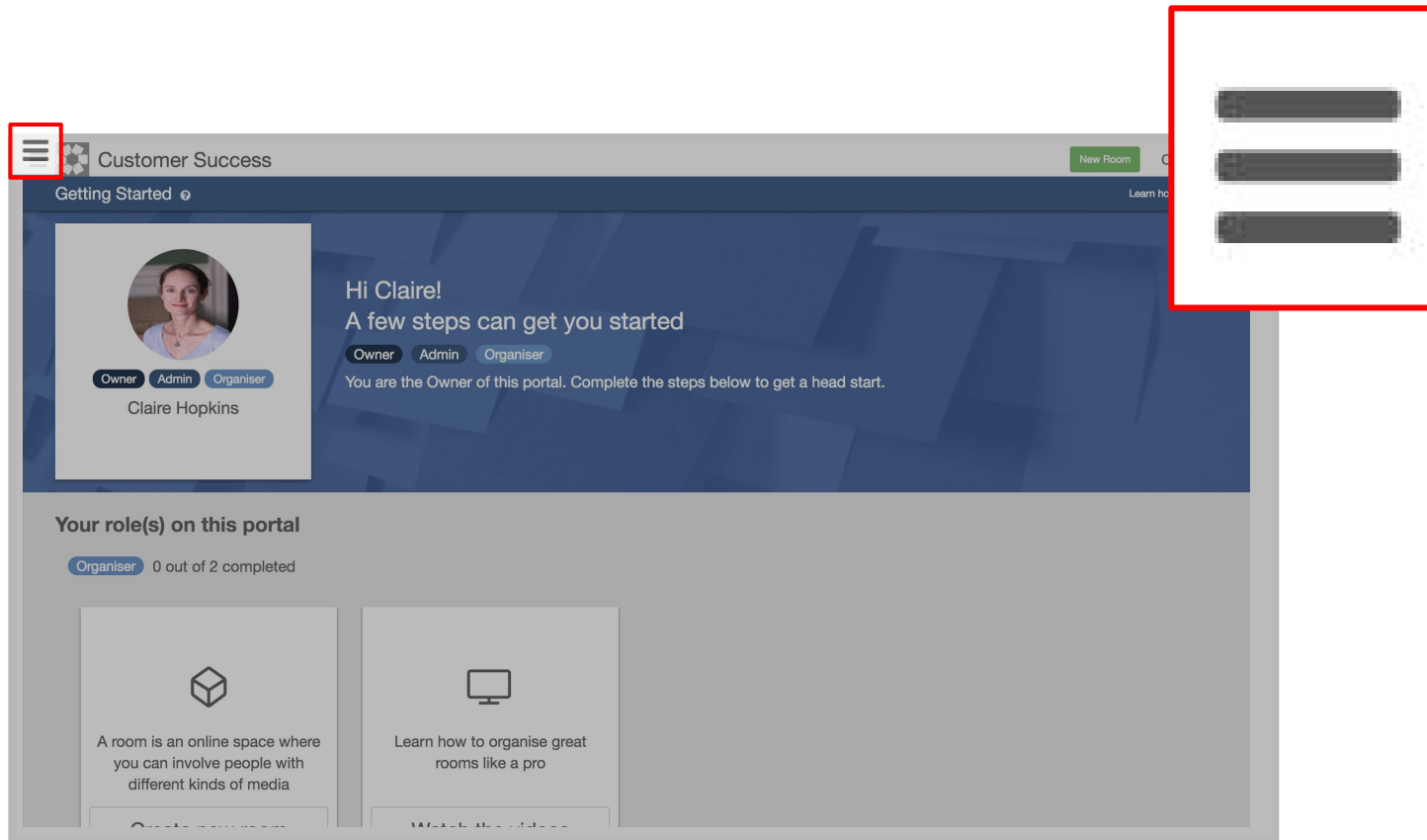
This How-to explains how to add and edit Shared Details in your portal.

Shared Details is one of the automated time-saving features of Stickyworld.

# Step 1. Select hamburger menu icon

How to: edit Shared Settings

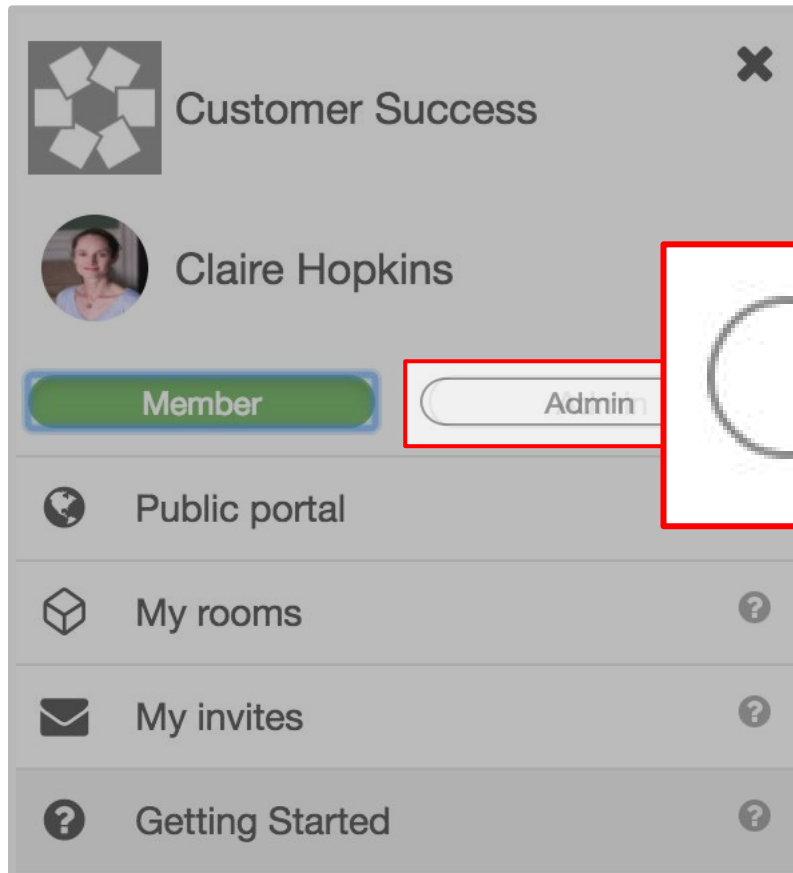
Once your portal has been created, look for the ‘hamburger’ menu icon on the top left of the page. Click on this to open a menu.



## Step 2. Select Admin button

How to: edit Shared Settings

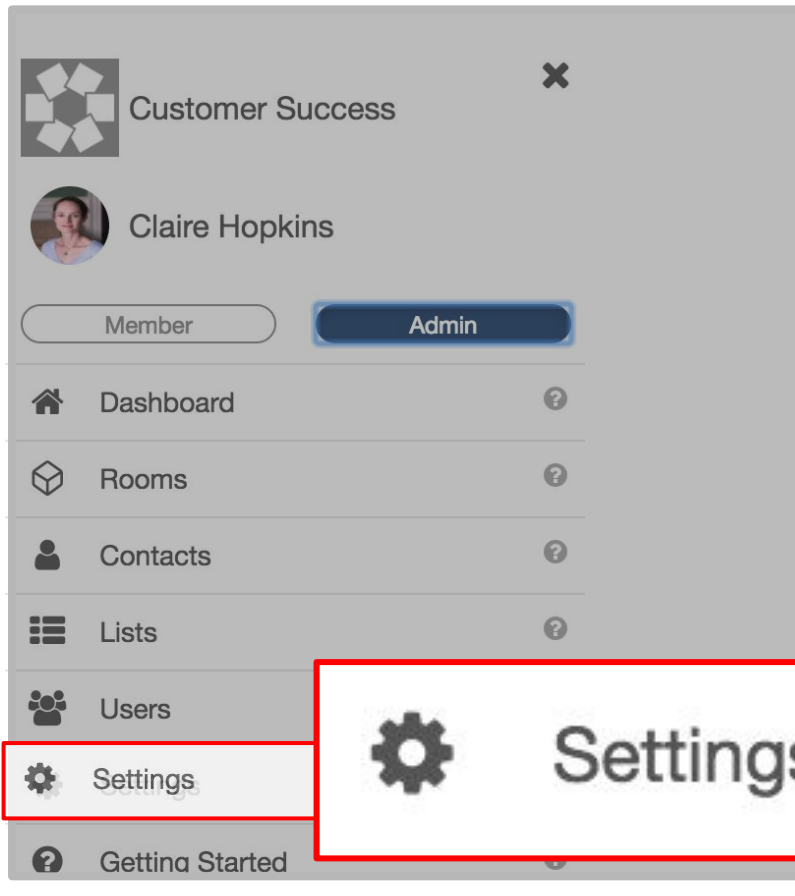
There are different menus under the hamburger menu. Click on the Admin button. The Admin menu will appear.



# Step 3. Select Settings

How to: edit Shared Settings

Scroll down the Admin menu and select Settings. This opens a Settings page you can edit.



These settings will be applied across the portal.



# Step 4. Select Shared Details

How to: edit Shared Settings

On the Settings page, select Shared Details in the menu. This opens up the Shared Details page you can edit.

Admin: Customer Success

Settings

Your Plan **Shared Details** portal page Advanced

Shared details are audience facing and can be used on public portal pages and in any room hosted on this portal.

### Basic information

Portal name	Customer Success	<input checked="" type="checkbox"/>
Organisation	Stickyworld Ltd	<input checked="" type="checkbox"/>
Logo	<div>Drag an image here or click to select an image to upload</div>	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>		
About the organisation	-	<input checked="" type="checkbox"/>
Portal banner	-	<input checked="" type="checkbox"/>
About the portal	-	<input checked="" type="checkbox"/>

### Contact information

Address	-	<input checked="" type="checkbox"/>
Telephone	-	<input checked="" type="checkbox"/>
Email	-	<input checked="" type="checkbox"/>

### Social

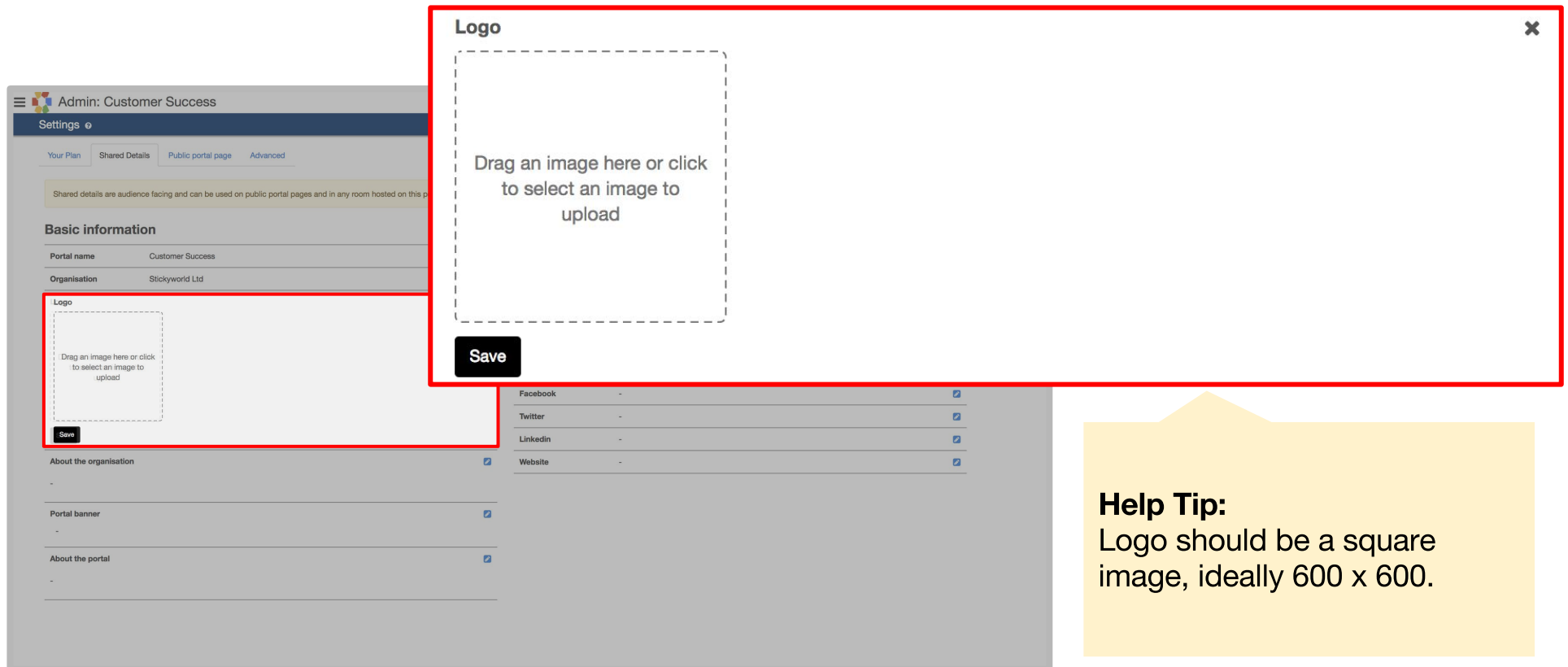
Facebook	-	<input checked="" type="checkbox"/>
Twitter	-	<input checked="" type="checkbox"/>
LinkedIn	-	<input checked="" type="checkbox"/>
Website	-	<input checked="" type="checkbox"/>

Shared details are audience-facing and can be used on public portal pages and in any Room hosted on the portal.

# Step 5: Add your logo

How to: edit Shared Settings

In Basic information, click on the pencil icon next to Logo. This opens a field where you can add your organisation's logo. Don't forget to press Save.



The screenshot shows the 'Admin: Customer Success' interface. The 'Settings' menu is open, and the 'Basic information' section is selected. The 'Logo' field is highlighted with a red box. A modal window titled 'Logo' is open, showing a dashed box for the image and a 'Save' button. The modal also contains the text: 'Drag an image here or click to select an image to upload'.

**Help Tip:**  
Logo should be a square image, ideally 600 x 600.

# Step 6: Update Basic information

How to: edit Shared Settings

Click on the pencil icon next to About the organisation and About the portal and add this information in each of the editable fields.

The screenshot displays the 'Admin: Customer Success' interface. A modal window titled 'About the portal' is open, showing a text area with the content: 'This portal is designed to help customers maximise their use of the Stickyworld platform'. Below the text area is a 'Save' button. The background shows the 'Settings' page with tabs for 'Your Plan', 'Shared Details', 'Public portal page', and 'Advanced'. The 'Basic information' section is visible, containing fields for 'Portal name' (Customer Success), 'Organisation' (Stickyworld Ltd), 'Logo', 'About the organisation', 'Portal banner', 'Telephone', 'Email', 'Social' (Facebook, Twitter, LinkedIn, Website), and 'About the portal'. A red box highlights the 'About the portal' field in the background, and another red box highlights the 'About the portal' modal window.

**About the portal**

This portal is designed to help customers maximise their use of the Stickyworld platform

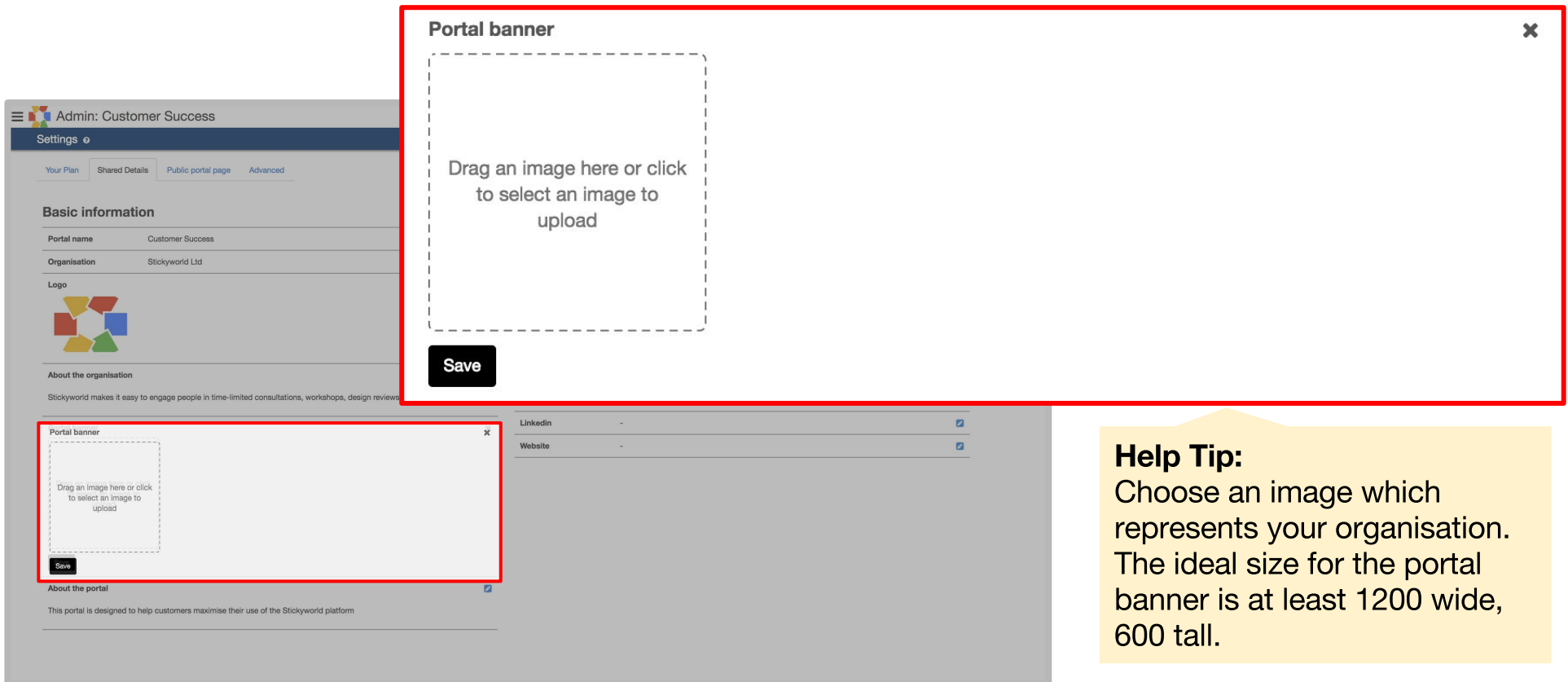
**Save**

**Help Tip:**  
Keep sentences short and use plain English.

# Step 7. Add a portal banner

How to: edit Shared Settings

Lastly in Basic information, click on the pencil icon to add a portal banner. This will be the background image for your home page.



The screenshot shows the 'Admin: Customer Success' interface. The 'Settings' menu is open, and the 'Basic information' tab is selected. The 'Portal banner' modal is open, displaying a dashed box for image upload with the text 'Drag an image here or click to select an image to upload' and a 'Save' button. The background shows the 'Basic information' section with fields for 'Portal name' (Customer Success), 'Organisation' (Stickyworld Ltd), and a logo. Below this is the 'About the organisation' section. To the right, there are social media links for LinkedIn and Website, both marked with checkmarks.

**Portal banner**

Drag an image here or click to select an image to upload

Save

**Help Tip:**  
Choose an image which represents your organisation. The ideal size for the portal banner is at least 1200 wide, 600 tall.

# Step 8. Add contact information

How to: edit Shared Settings

Click on the pencil icon to update all your contact information. Remember to save everything you do.

The screenshot shows the 'Admin: Customer Success' interface. The 'Settings' tab is active, and the 'Contact information' section is highlighted with a red box. The 'Contact information' form is also highlighted with a red box and contains the following fields:

- Address**: 248 St Helier Avenue, London, SM4 6JZ. A pencil icon is visible in the top right corner.
- Telephone**: +44 (0)20 3868 1334. A close icon (X) is visible in the top right corner.
- Email**: - (empty). A pencil icon is visible in the top right corner.

A 'Save' button is located below the telephone field. The background shows the 'Basic information' section with fields for Portal name, Organisation, Logo, About the organisation, Portal banner, and About the portal.

# Step 9. Connect your social channels

How to: edit Shared Settings

Update the links to all your social channels by adding their urls.

The screenshot displays the 'Admin: Customer Success' interface. The 'Settings' menu is open, showing tabs for 'Your Plan', 'Shared Details', 'Public portal page', and 'Advanced'. The 'Shared Details' tab is active. On the left, the 'Basic information' section includes fields for 'Portal name' (Customer Success), 'Organisation' (Stickyworld Ltd), 'Logo', 'About the organisation', 'Portal banner', and 'About the portal'. On the right, the 'Contact information' section includes fields for 'Address', 'Telephone', and 'Email'. A red box highlights the 'Social' settings panel, which is titled 'Social' and contains a table of social media links. The table has columns for the platform name, the URL, and an edit icon. The links listed are: Facebook (https://www.facebook.com/Stickyworld), Twitter (https://twitter.com/Stickyworld), and LinkedIn (https://www.linkedin.com/company/1066691/). Below the table is a 'Website' section with a text input field containing 'http://info.stickyworld.com/' and a 'Save' button. The 'Social' panel is also highlighted by a red box.

Social		
Facebook	https://www.facebook.com/Stickyworld	
Twitter	https://twitter.com/Stickyworld	
Linkedin	https://www.linkedin.com/company/1066691/	
Website		
<input type="text" value="http://info.stickyworld.com/"/>		
<input type="button" value="Save"/>		

## You've edited Shared Details

Congratulations! You've edited your Shared Details. This information will be used across your portal in the Public Home Page and all your Rooms, saving you time and ensuring consistency in the way your brand is presented.

## What's next?

Next, have a look at 'How-to: set up your public home page

## 1.2 How-to: set up your public home page.



# Introduction

**Your public home page enables you to present your brand and encourage participation. Visitors can explore your published Rooms, get in contact with you and share the page with others.**

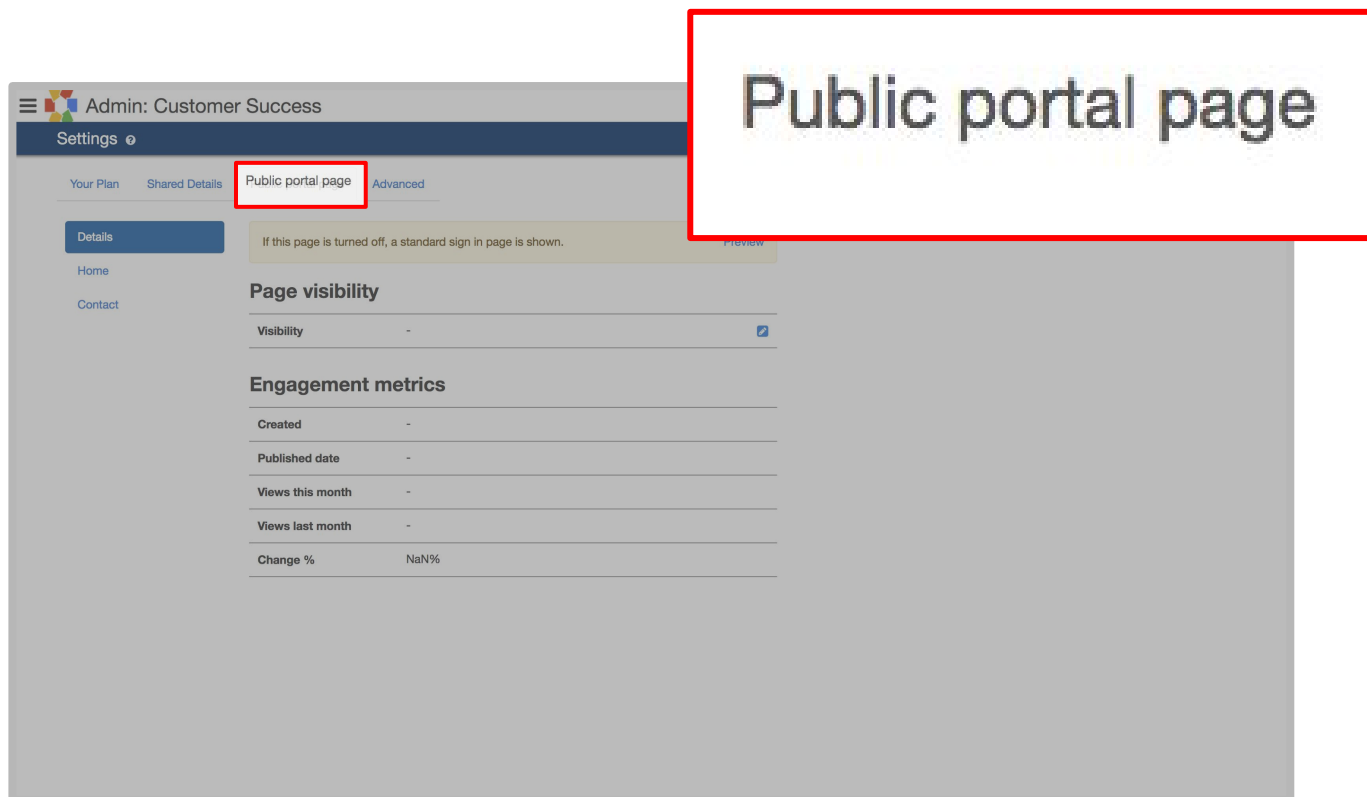
You only need to edit and publish your public home page if you intend to publish public Rooms.

This How-to explains how to set up the public home page.

# Step 1. Select public portal page

How to: set up your public home page

On the Settings page, select Public portal page in the menu. This opens up the Details page.



## Step 2. Turn page visibility on

How to: set up your public home page

In Details you'll see Page visibility. Click on the pencil next to Visibility, tick to turn this on and then Save.

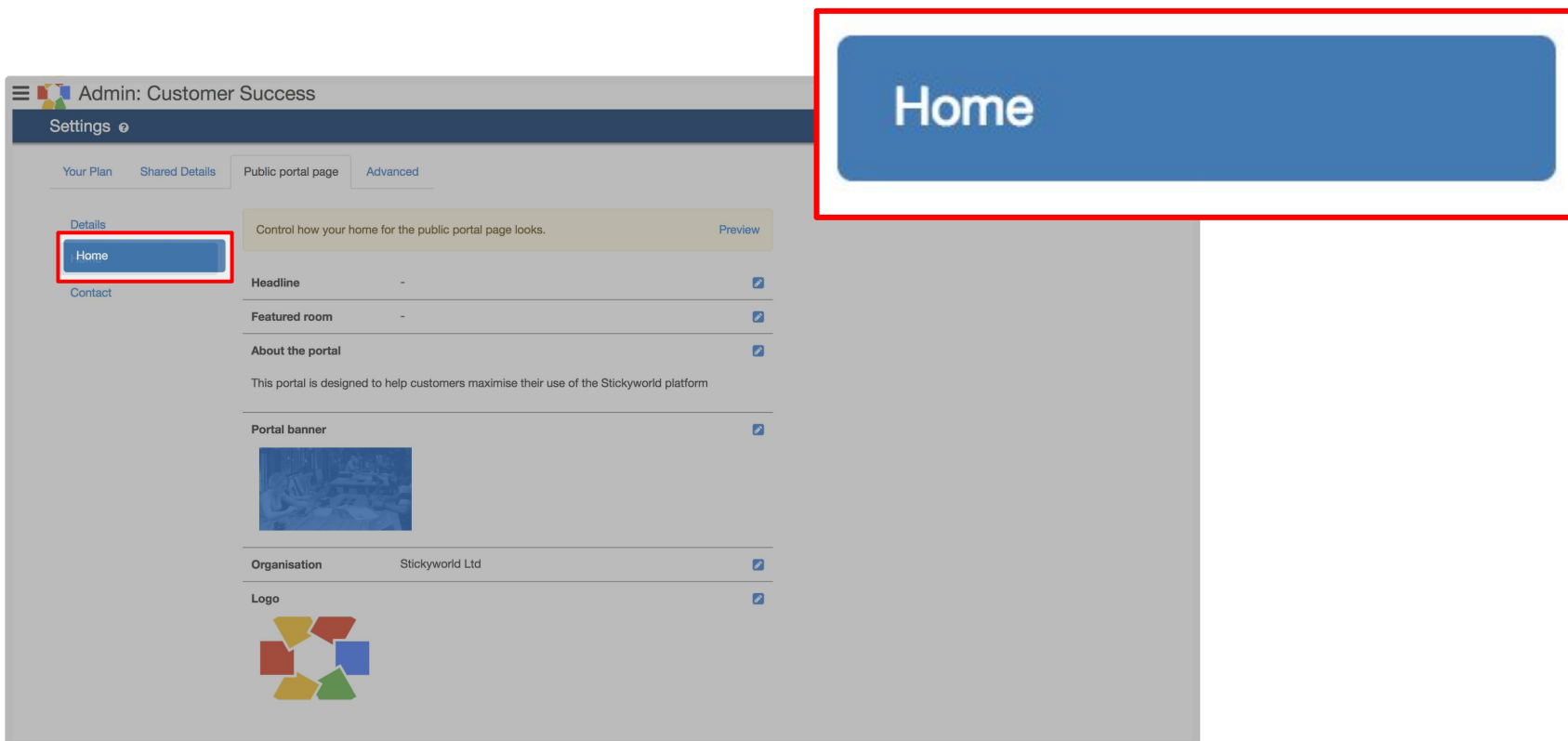
The screenshot shows the Stickyworld Admin interface. The main header is 'Admin: Customer Success'. The left sidebar has a 'Settings' menu with options: 'Your Plan', 'Shared Details', 'Public portal page', and 'Advanced'. The 'Details' tab is selected, showing a 'Home' button and a 'Contact' button. A 'Page visibility' modal is open, showing a 'Visibility' section with a checked 'On' checkbox and a 'Save' button. The modal also has a close button (X) in the top right corner. Below the modal, the 'Page visibility' settings are visible in the 'Details' tab, showing a 'Visibility' section with a checked 'On' checkbox and a 'Save' button. Below this, there is an 'Engagement metrics' table with the following data:

Engagement metrics	
Created	-
Published date	-
Views this month	-
Views last month	-
Change %	NaN%

# Step 3. Edit the home page

How to: set up your public home page

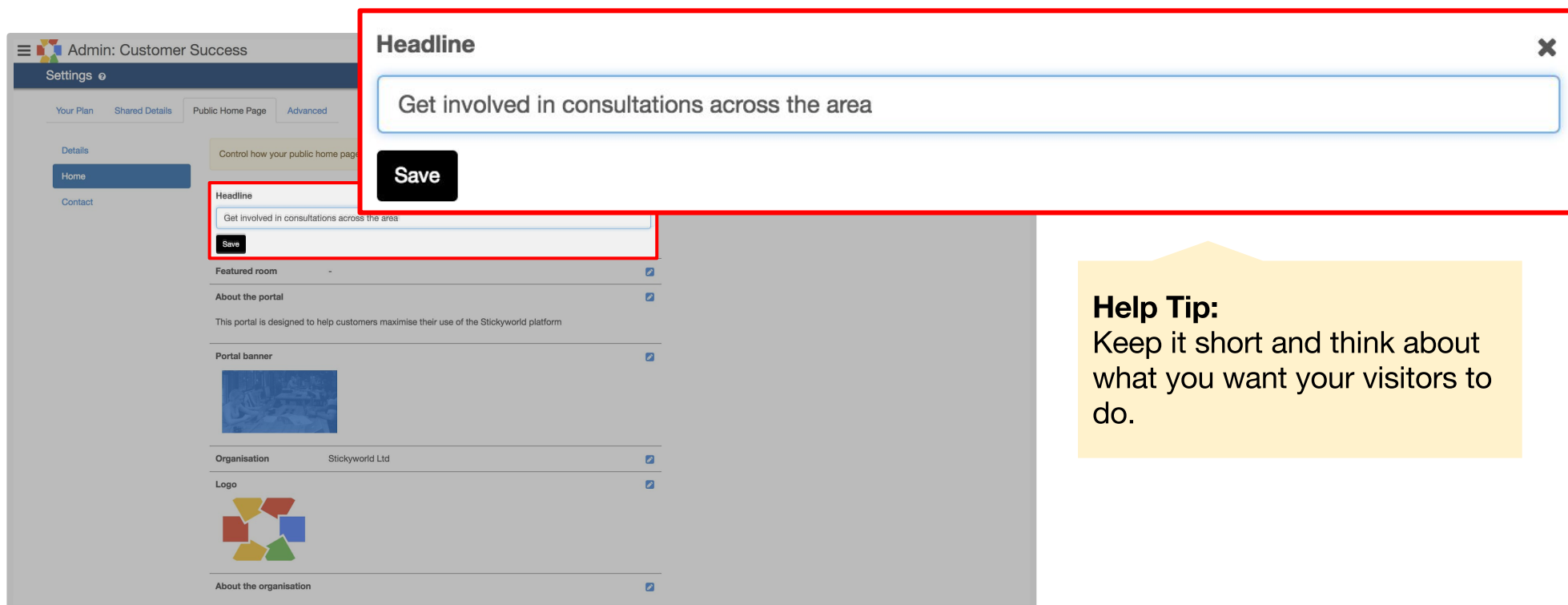
In the drop down menu click Home. This opens up a new page. Some details will already be added if you have edited Shared Details.



# Step 4. Add the headline

How to: set up your public home page

Click on the pencil icon next to Headline and add the engagement headline for your public home page. Save this.



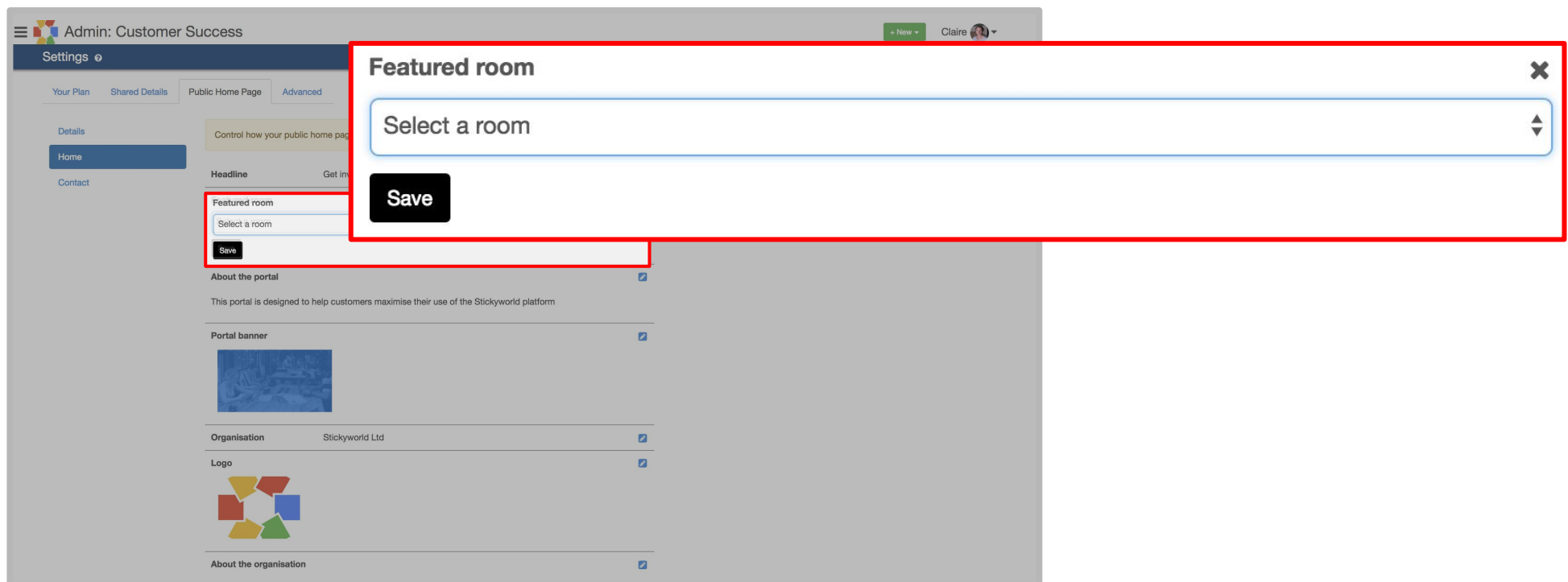
The screenshot displays the 'Admin: Customer Success' interface. On the left, a sidebar shows 'Settings' with a dropdown menu. The main area is titled 'Public Home Page' and contains a 'Headline' section. A modal window titled 'Headline' is open, showing a text input field with the text 'Get involved in consultations across the area' and a 'Save' button. The modal is highlighted with a red border. Below the modal, the 'Public Home Page' settings are visible, including 'Featured room', 'About the portal', 'Portal banner', 'Organisation', 'Logo', and 'About the organisation'.

**Help Tip:**  
Keep it short and think about what you want your visitors to do.

# Step 5. Select a Room to feature

How to: set up your public home page

Click on the pencil icon next to Featured room and select one of your public Rooms from the drop down menu to showcase on your public home page.

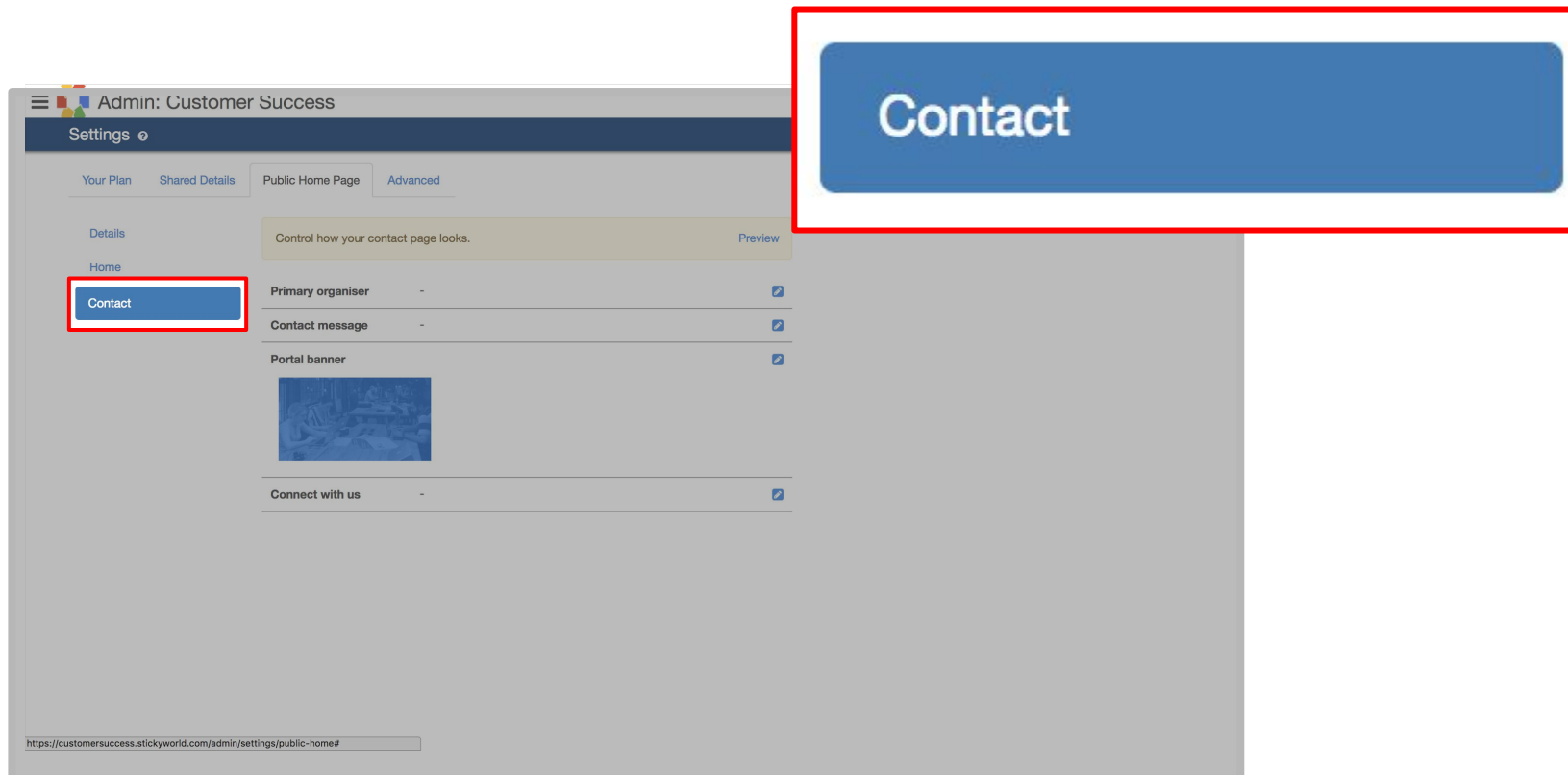


The screenshot displays the 'Admin: Customer Success' interface. On the left, a sidebar contains 'Settings' with sub-tabs: 'Your Plan', 'Shared Details', 'Public Home Page', and 'Advanced'. The 'Public Home Page' tab is active. Below it, a 'Details' section has a 'Home' button. The main content area shows 'Control how your public home page' with fields for 'Headline' and 'Featured room'. The 'Featured room' field has a dropdown menu with 'Select a room' and a 'Save' button. A red box highlights the 'Featured room' field and the 'Save' button. A modal window titled 'Featured room' is open, showing a dropdown menu with 'Select a room' and a 'Save' button. The modal also has a close button (X) in the top right corner.

# Step 6. Add contact details

How to: set up your public home page

In the drop down menu click Contact. This opens up a new editable page to add your contact details.



# Step 7. Select an organiser

How to: set up your public home page

Click on the pencil icon next to Primary organiser and select the right person from the drop down menu. For now this is likely to be you, but you can change this at a later date.

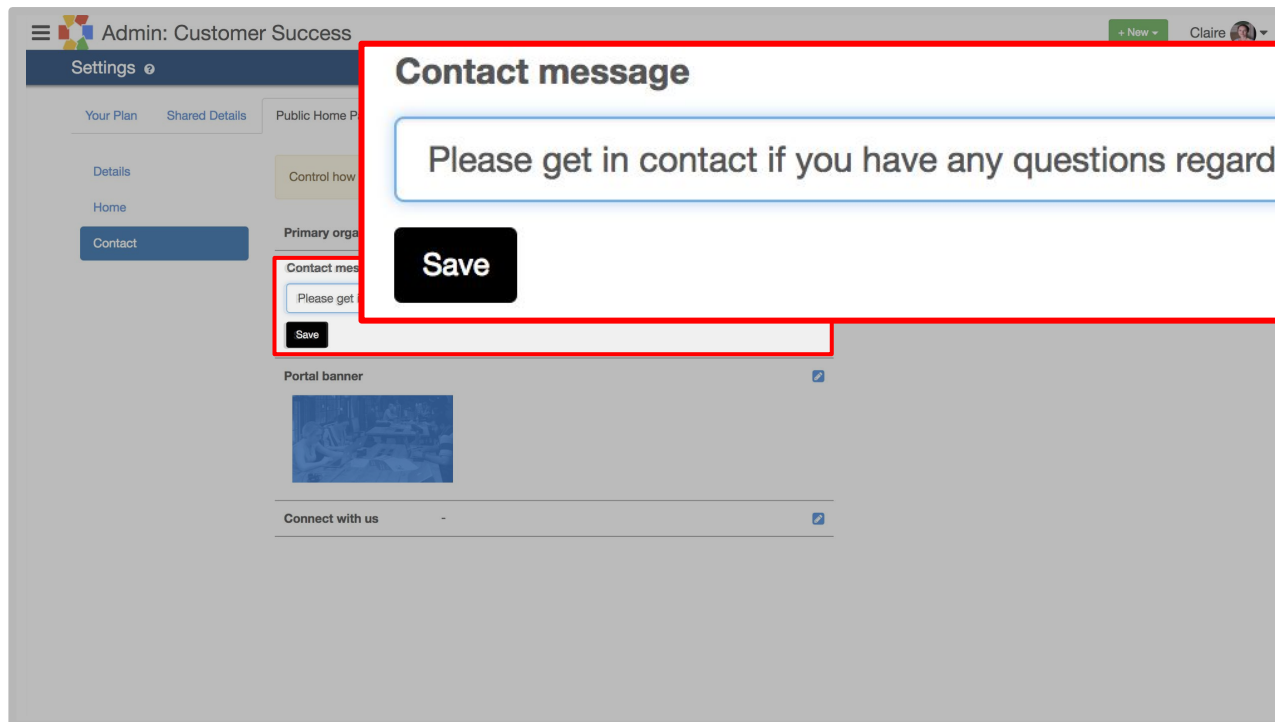
The screenshot displays the 'Admin: Customer Success' interface. On the left, a sidebar contains 'Settings' and 'Contact' buttons. The main area shows 'Public Home Page' settings. A modal window titled 'Primary organiser' is open, featuring a dropdown menu labeled 'Select an organiser' and a 'Save' button. A red box highlights the 'Primary organiser' section in the background settings and the modal window.



## Step 8. Add a message

How to: set up your public home page

Click on the pencil icon next to Contact message and add a compelling message inviting your visitors to get in touch.



# Step 9. Publish your contact details

How to: set up your public home page

Lastly, click on the pencil icon next to Connect with us and turn this capability on. The contact information you have added in Shared Details will be automatically published on your home page.

The screenshot displays the 'Admin: Customer Success' interface. The top navigation bar includes a menu icon, the title 'Admin: Customer Success', a '+ New +' button, and a user profile for 'Claire'. Below this is a 'Settings' header with a 'Learn how it works' link. The main content area has tabs for 'Your Plan', 'Shared Details', 'Public Home Page', and 'Advanced'. Under 'Public Home Page', there are sub-tabs for 'Details', 'Home', and 'Contact'. The 'Contact' tab is active, showing a 'Control how your contact page looks.' section with a 'Preview' button. Below this, there are three rows: 'Primary organiser' (Claire Hopkins), 'Contact message' (Please get in contact if you have any questions regarding our consultations.), and 'Portal banner'. A modal titled 'Connect with us' is open, showing a checked checkbox for 'On' and a 'Save' button. The modal is highlighted with a red border.

Admin: Customer Success

Settings

Your Plan Shared Details Public Home Page Advanced

Details

Home

Contact

Control how your contact page looks. Preview

Primary organiser Claire Hopkins

Contact message Please get in contact if you have any questions regarding our consultations.

Portal banner

Connect with us

☒ On

Save

# You've set up your Public Home page

That's it. You have now set up your public home page. Visitors can understand more about you and what you are asking them to do. They can see your featured public Room, connect with you on social media and easily get in contact.

## What's next?

We'll be publishing more customer success guides to help you manage your portal, including How tos on list management and understanding your dashboard.

We will send you these as soon as they are completed.

# Meet the Stickyworld team who can help you

You'll always find one of the team is available in the in-app support channel and able to help you.

Click the drop down menu next to your profile image, and Contact Support.



Michael



Chris



Claire



Karsh

# Thanks for reading

We hope this guide on setting up your Stickyworld portal has been useful.

If you have any feedback on how we can improve the guide please do let us know. You can contact us at anytime on [success@stickyworld.com](mailto:success@stickyworld.com)

Get in touch with your questions:

[success@stickyworld.com](mailto:success@stickyworld.com)

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