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

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Contents

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1.1   How-to: edit Shared Details

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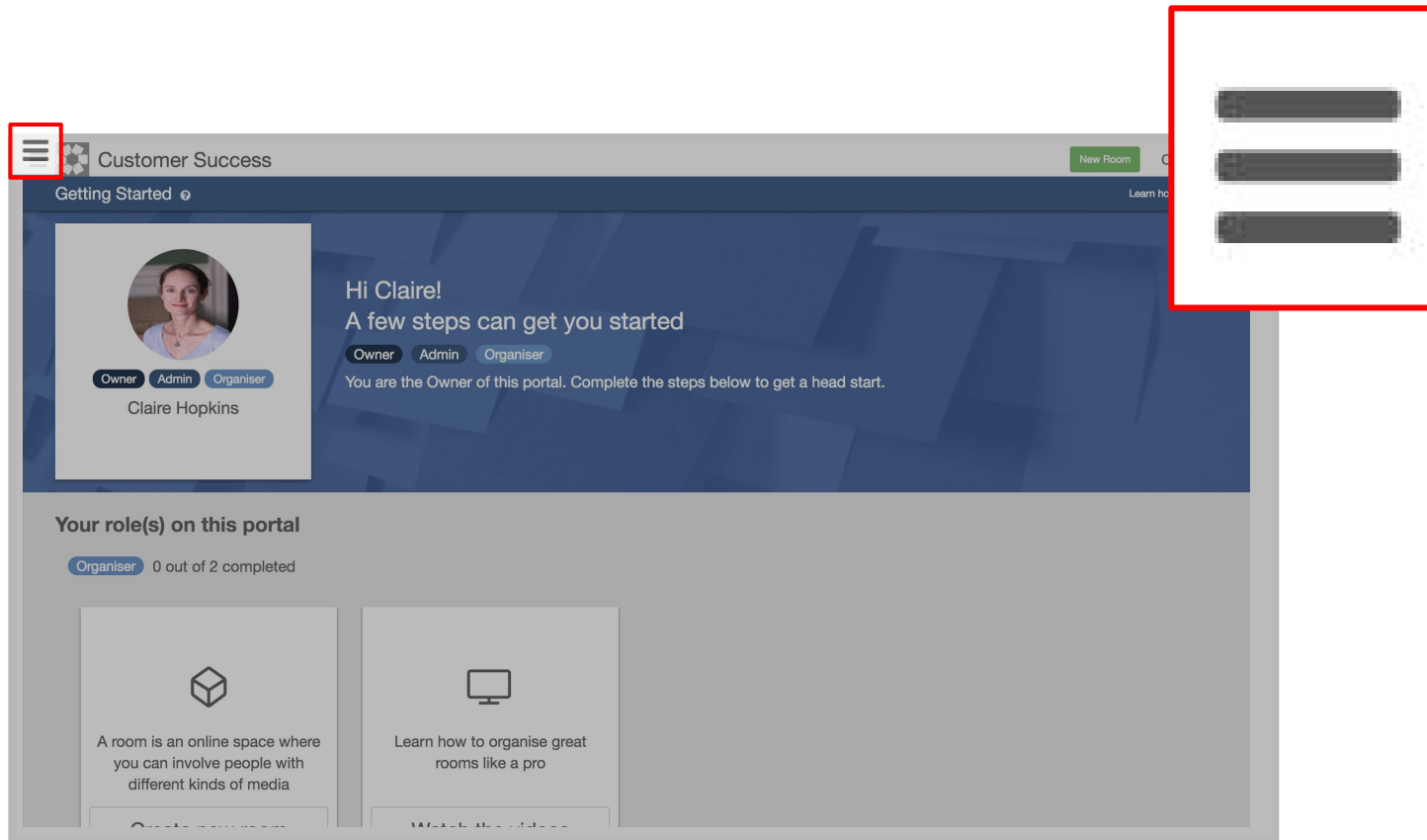
This How-to explains how to add and edit Shared Details in your portal.

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

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Step 1. Select hamburger menu icon

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

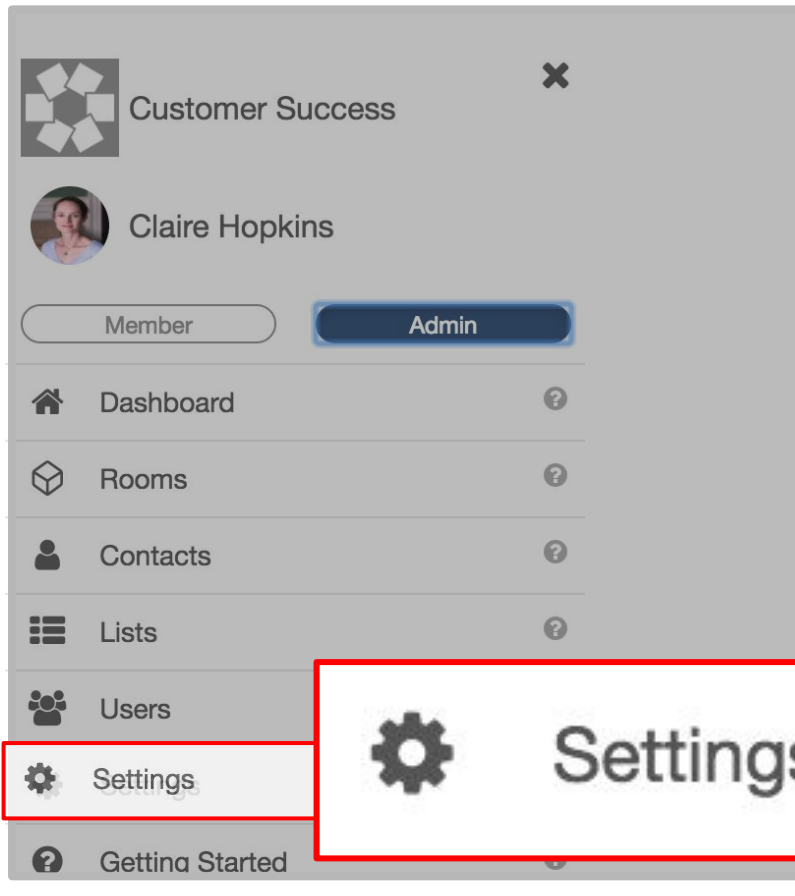There are different menus under the hamburger menu. Click on
the Admin button. The Admin menu will appear.

Customer Success

Claire Hopkins

| Member | Admin |

🌐 Public portal

📦 My rooms ❓

✉️ My invites ❓

❓ Getting Started ❓

Admin

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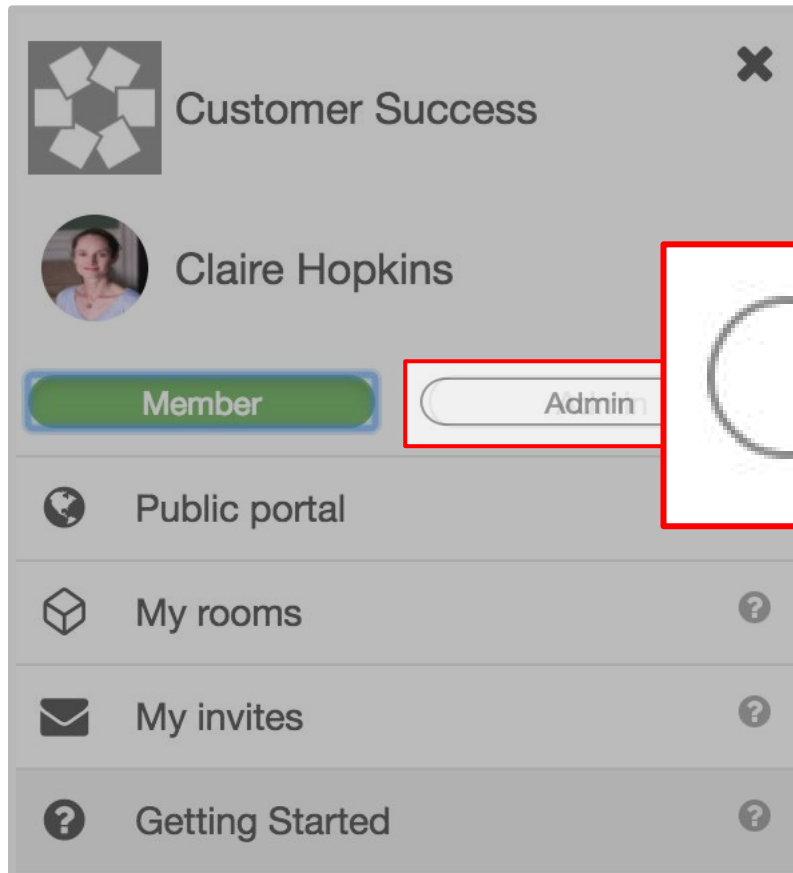
Step 3. Select Settings

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

These settings will be applied across the portal.

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Step 4. Select Shared Details

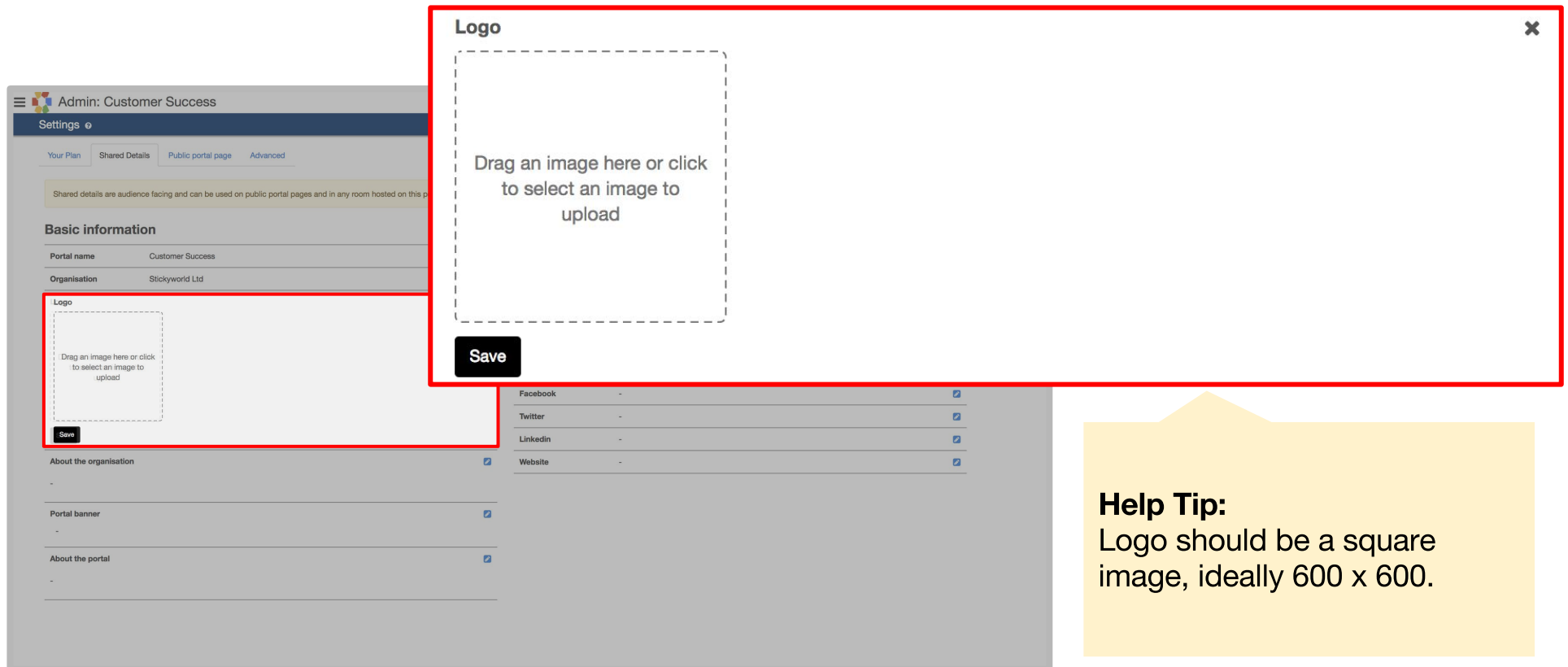On the Settings page, select Shared Details in the menu. This opens up the Shared Details page you can edit.

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

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Step 5: Add your logo

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.

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

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Step 6: Update Basic information

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

About the portal

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

Save

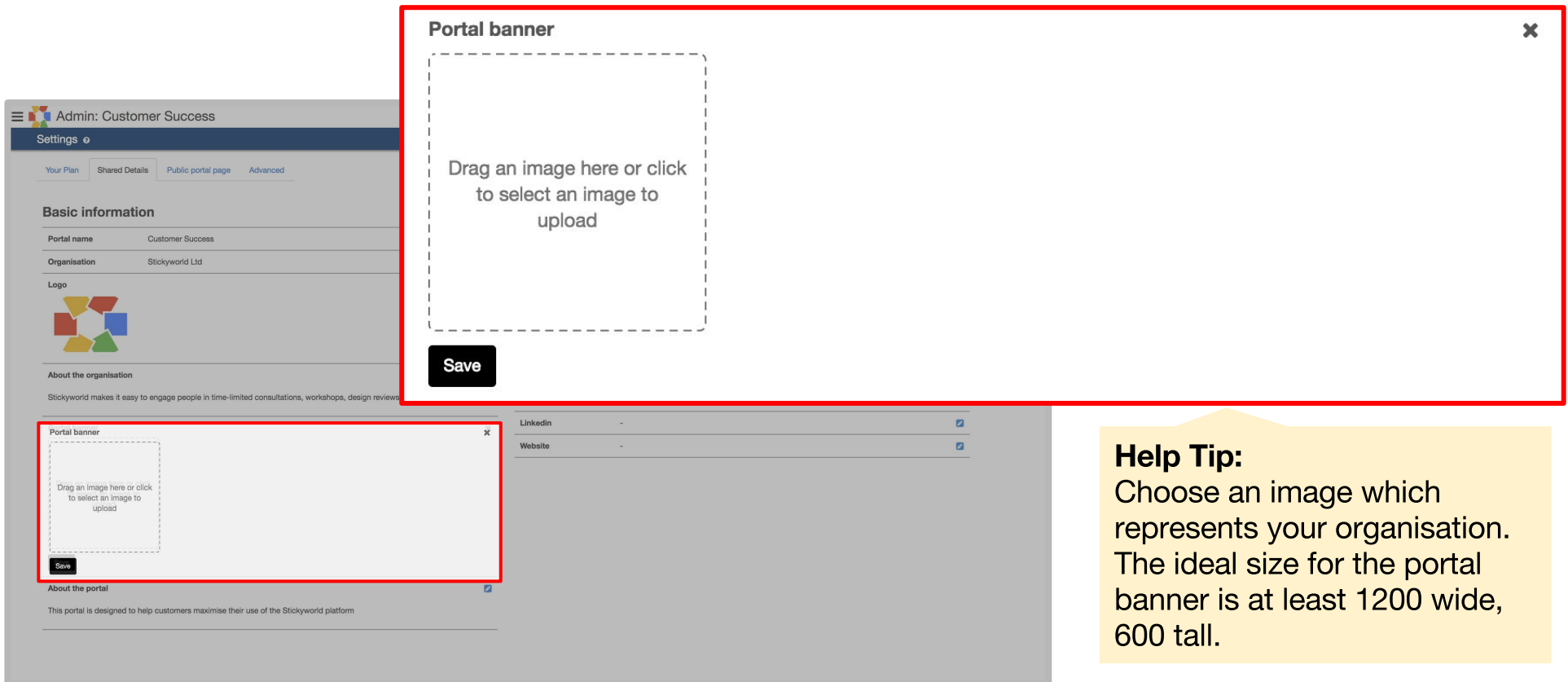**Help Tip:**
Keep sentences short and use plain English.

Admin: Customer Success

Settings

Your Plan | Shared Details | Public portal page | Advanced

Shared details are audience facing and can be used on public portal pages and in an

Basic information

| Portal name | Customer Success |
| Organisation | Stickyworld Ltd |

Logo

About the organisation

Stickyworld makes it easy to engage people in time-limited consultations, workshops, design reviews and more.

Portal banner

About the portal

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

Save

| Telephone | - |
| Email | - |

Social

Facebook	-
Twitter	-
Linkedin	-
Website	-

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Step 7. Add a portal banner

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

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

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Step 8. Add contact information

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

Step 9. Connect your social channels

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

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

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

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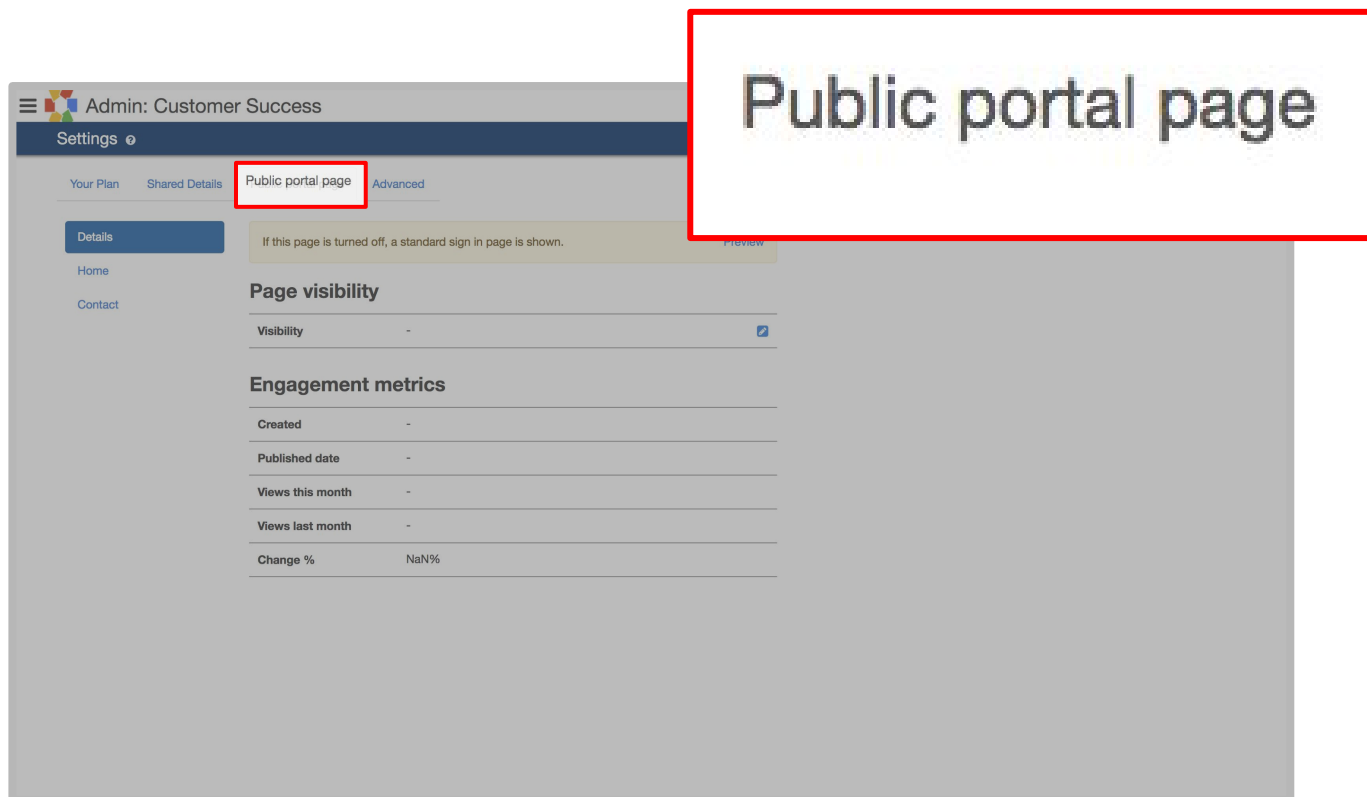
You only need to edit and publish your public home page if you intend to publish public Rooms.

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

Step 1. Select public portal page

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

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Step 2. Turn page visibility on

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

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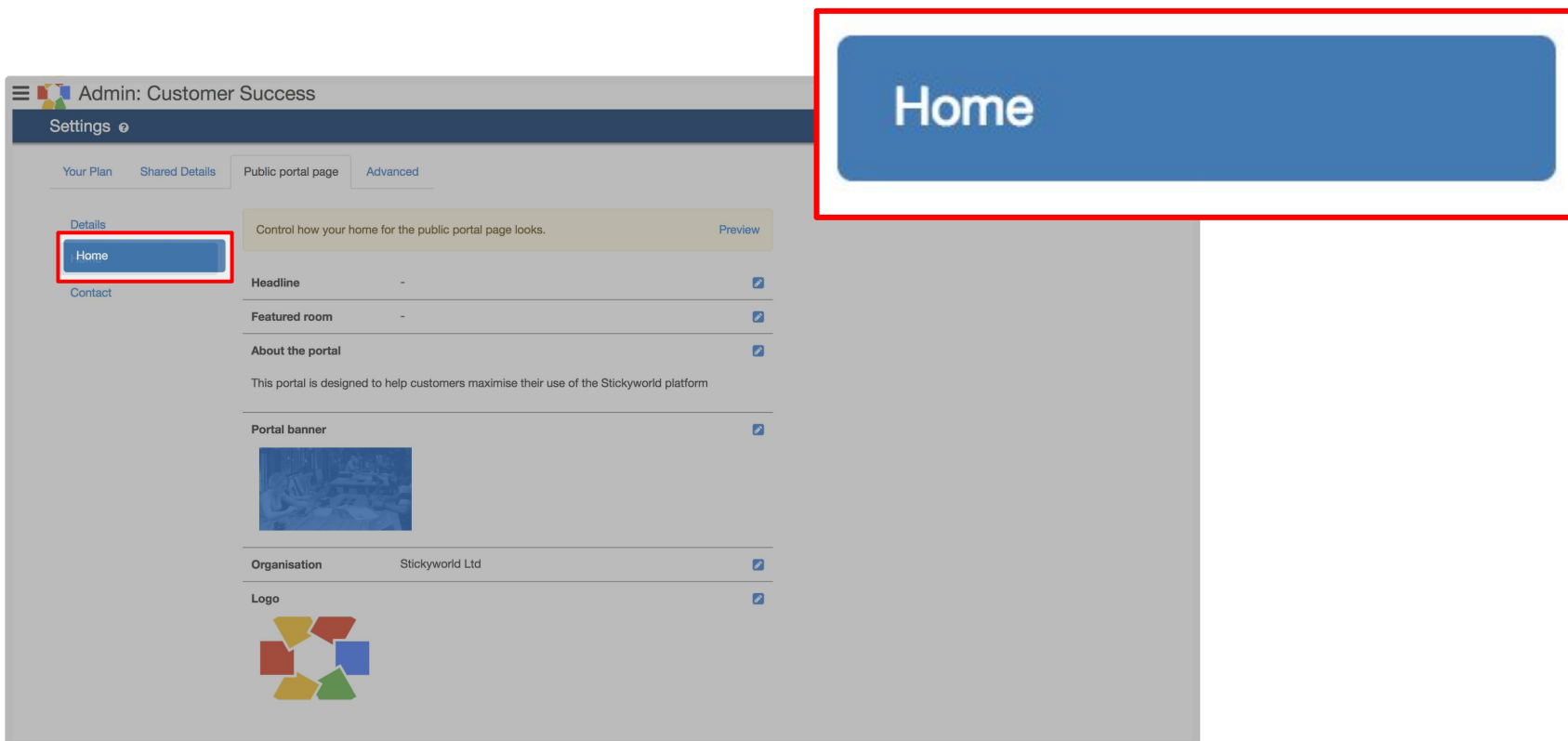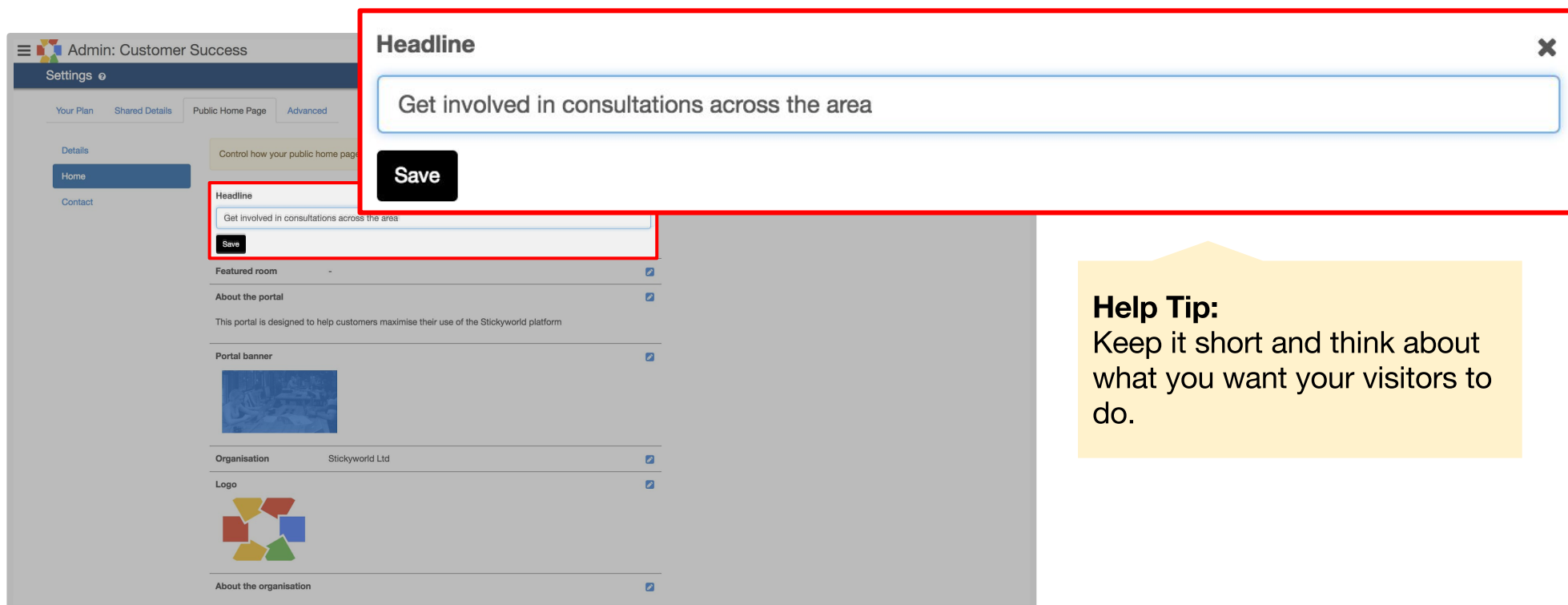# Step 3. Edit the home page

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

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

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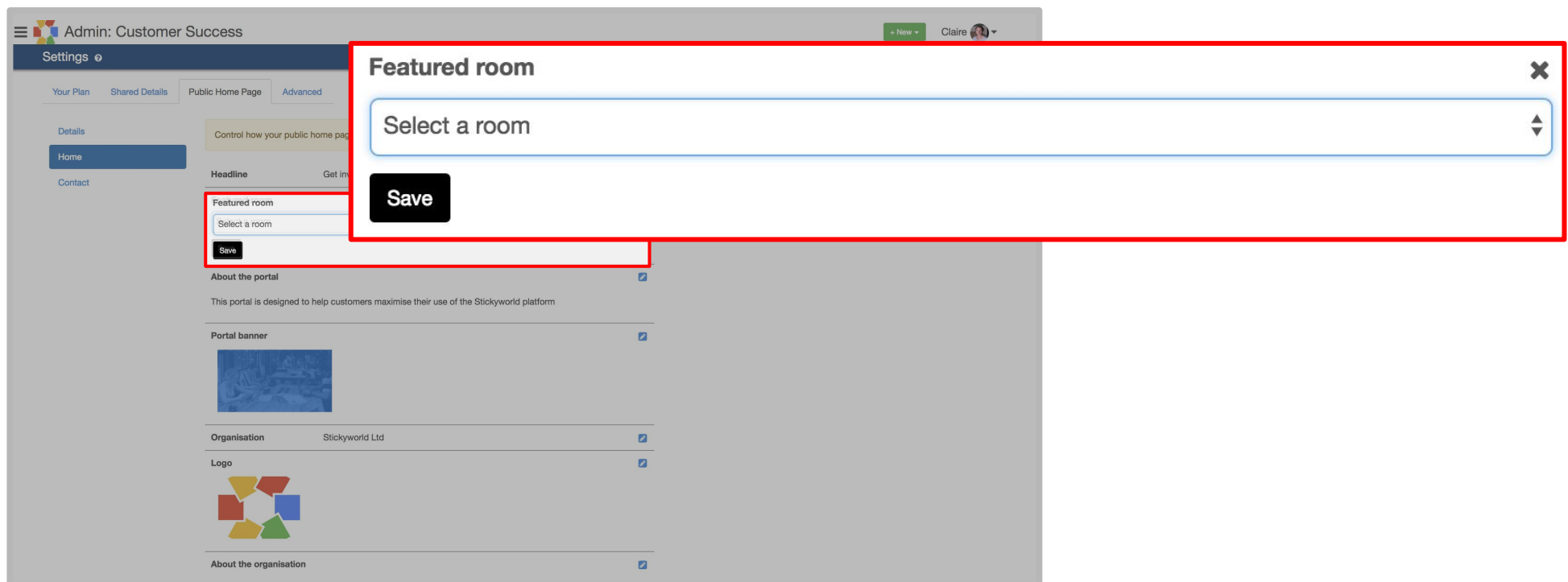Keep it short and think about what you want your visitors to do.

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Step 5. Select a Room to feature

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.
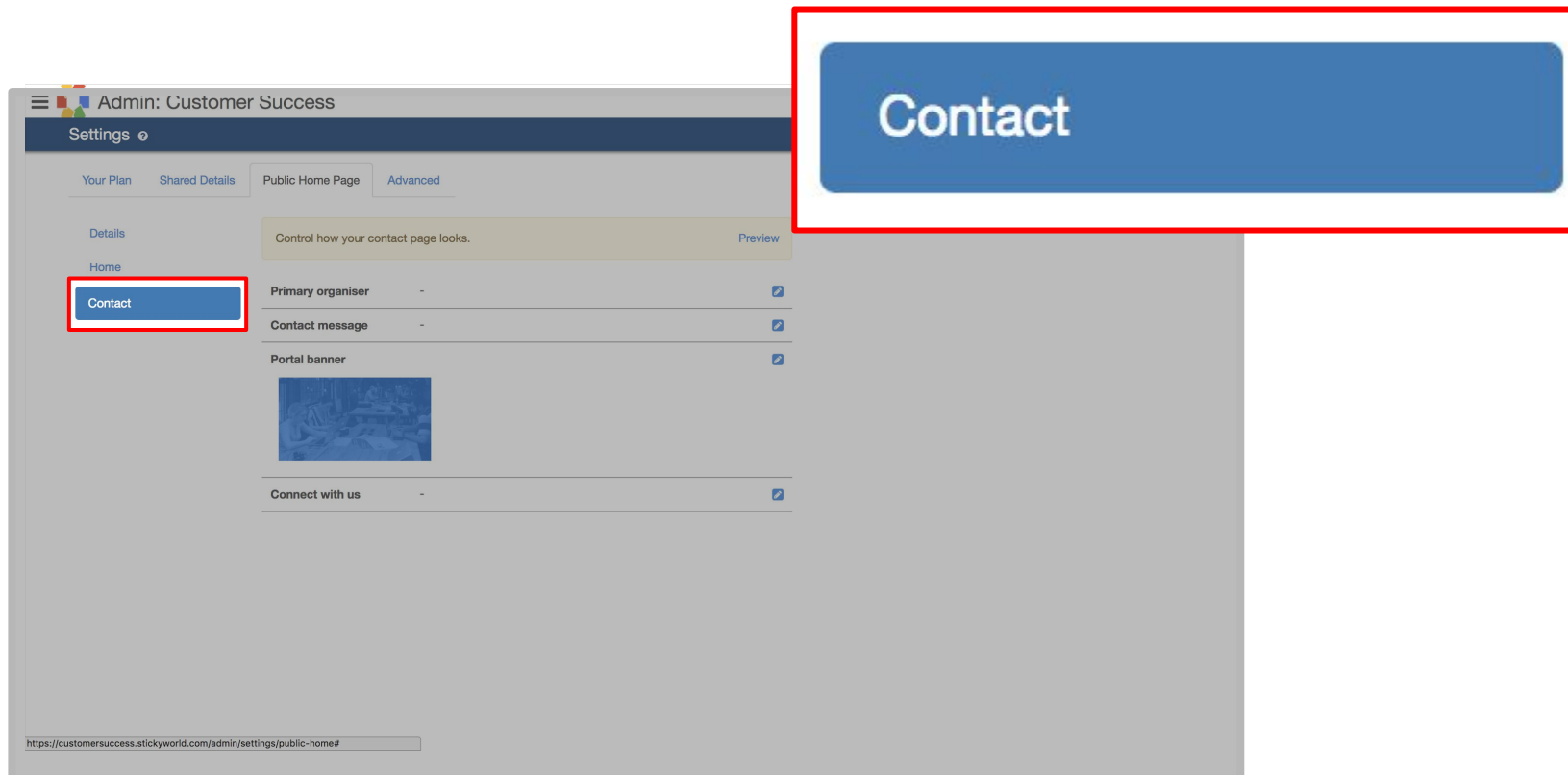

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Step 6. Add contact details

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

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Step 7. Select an organiser

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.
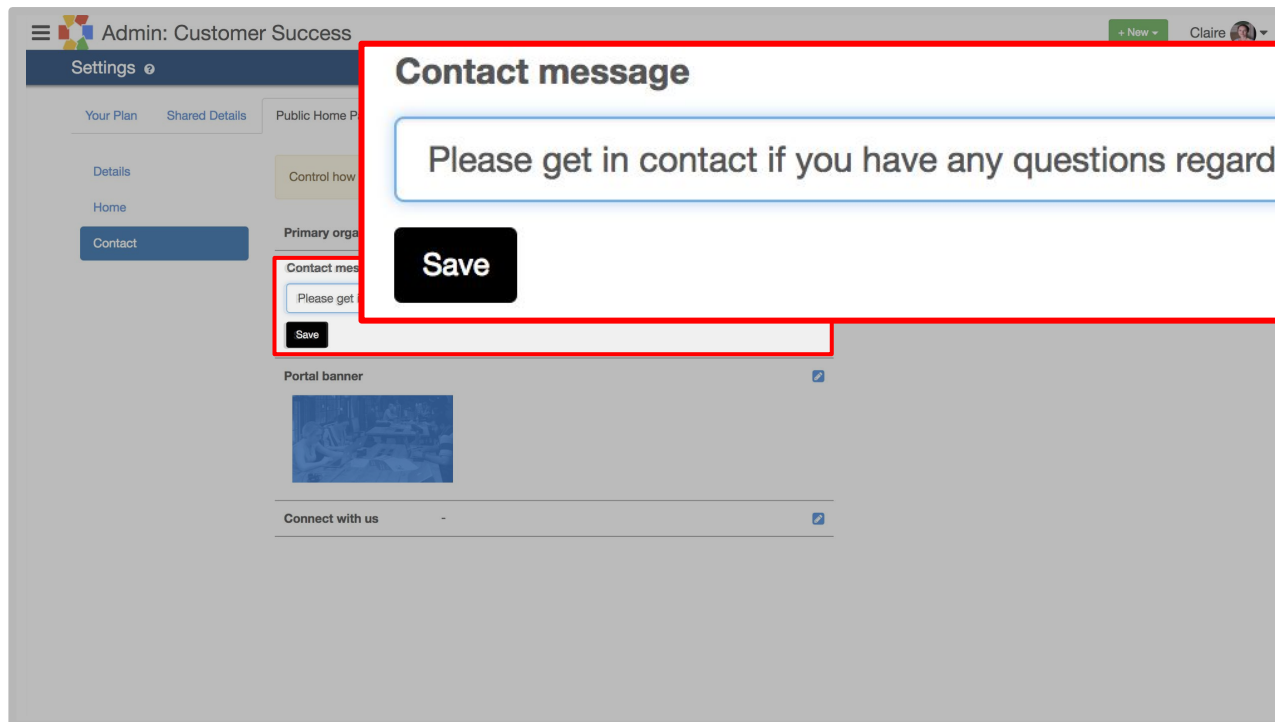

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Click on the pencil icon next to Contact message and add a
compelling message inviting your visitors to get in touch.

Step 9. Publish your contact details

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.

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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

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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

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Get in touch with your questions:

success@stickyworld.com

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