Getting Started with PortalProdigy Guide

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Getting Started:

The quickest way to get started is with one of our Instant website packages.

Select from:

- Instant Retail Website
- Instant Wholesale Website
- Instant Manufacturer Website
- Instant Corporate Web Portal
- Instant Association Web Portal
- Instant Non-Profit Web Portal
- Instant Help Desk Web Portal
- Instant Resource Web Portal

This guide will instruct you how to configure the essential options for each feature. For a comprehensive explanation of all options and their configuration see the PortalProdigy Administration Guide.

Before you begin the process of setting up your PortalProdigy website we suggest the following:

A. Draw a site map on a sheet of paper. It is helpful to create as a hierarchy starting with your home page and showing how users will navigate your site. Draw a box for each features or page type.

    a. [Insert example]

B. Create list of keywords/phrases. This is part of SEO (Search Engine Optimization) strategy.

C. Prepare content to be imported such as documents, products, and contacts.

D. Determine what you want on your Home page.

PortalProdigy IBCAs are available to guide you through this process.

You are now ready to begin the setup and configuration process.

How to Access the Configuration Menu:

1) Go to your home page and press Ctrl-Alt-M to access Main Administration Menu.

2) You will be prompted to login. Follow the logon instructions that were emailed to you. They provide a login with full Administrator rights.

3) You should see the following screen:

4) Select "Configuration Menu" from list box where it says "Main Administration Menu" (indicated by blue arrow in picture above).

5) Click on "1. Initial Configuration".

6) Click on "a. Site Settings". You are ready to configure the first set of options.

Note: The focus of this guide is on the essential options necessary to get you started. PortalProdigy provides many advanced options but they are not necessary to get your website up and running. Thus this guide will skip some of the options. Many of these options that will skip for now will get configured automatically when you enter Design Mode and use the in-page edit options.

Site Settings:

Site Administration > Configuration Menu > 1. Initial Configuration > a. Site Settings

Site Settings provide default values for your website. These default values can later be overridden for specific features and pages. Note that web sessions time-out after 15 minutes so it is good idea to periodically save the page that you are working on. Clicking the Save button will save your changes and allow you to continue working on the page.

1) Click on "View Styles" located to the right of Page Style. This will open Page Style Selection.

a) Browse and select a Page Style (template) by clicking on “Select”.

2) Enter a Copyright for you organization.

3) Enter a Report Title (usually your company name). This will be displayed on management reports.

4) Enter an Admin Page Title (usually your company name). This will be displayed in the administration panel.

5) Some templates have not been updated to support Design Mode. If using an old template Use Old Design will be set to “Yes”; otherwise it should be set to “No”.

6) Complete the Organization section.

a) Title 1 is used to enter a text title that is displayed in your website’s header (indicated by red arrow in picture below). Not all header styles support this. To find out if the header style supports it enter a value and view your home page. Tip: Open the home page in a separate browser tab. Save your Site Settings then click on the home page tab and select refresh F5 in most browsers.

b) Title 2 is used to enter another text titles that is displayed in your website’s header (indicated by red arrow in picture below).

c) Ignore Append Organization Title and Use Title options.

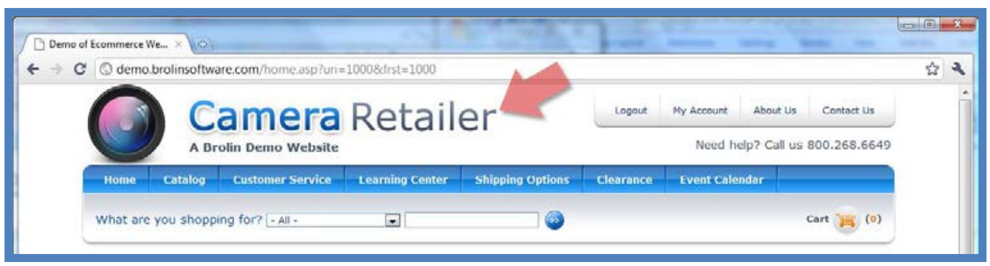
d) Complete the other fields including Company Name, Address, Phone, FAX (optional), and Email. Note that this information will be used to provide default values to various public pages such as your Contact Us page, Order page, etc. Be sure to use a phone number and email address that you want to make public.

7) Click on the “Global Variables” button. This will open the Component Style Custom Values page in new window.

   a) Use the “Browse” button to load your logo. Most templates utilize “cvg#Logo1” and “cvg#Logo2”. See the “Template Guide” for additional instructions for Logos.

      (Logo1 is indicated by red arrow in picture below)

      (Logo2 is indicated by red arrow in picture below)



   b) Click Save and close the Component Style Custom Values page window.

8) Complete the Search Engine Settings section.

   a) Enter a default Page Title for your website.

   b) Enter a default Meta Tag Description for your website.

   c) Enter a Meta Tag Description Addendum. This will be added to the Meta Tag Description on all pages.

   d) Enter Meta Tag Keywords as words/phrases separated by commas.

   e) Script is where you enter your Google Analytics Tracking script and other tracking scripts that want added to your website. You can later override this for individual pages.

9) Click Save located at the bottom of the page.

Home Page:

Site Administration > Configuration Menu > 1. Initial Configuration > a. Home Page

Most of the options on this page default to your Site Settings so there is nothing to configure on this page for now. You will later use Design Mode to add content ("Widgets") to your home page.

About Us:

Site Administration > Configuration Menu > 1. Initial Configuration > c. About Us

Most of the options on this page default to your Site Settings. The only option you need to configure is the About Us Information. You will enter a description of your organization in the About Us Information memo field. You may enter either as text directly into the memo field or you may use the HTML Editor option to enter and format your About Us Information.

1) Click on the Editor icon located next to About Us Information.

2) Using the Editor create the content for your About Us page. You may paste content from another application and use the Editor to format it.

3) When finished creating your content click Save located at the bottom of the Editor page.

4) Click Close located at the bottom of the Editor page to return to About Us Page Manager.

5) You may override the Search Engine Setting for this page. This information defaults to the information you entered in Site Settings. To override check the checkbox for the field you want to change, select Specify, then enter the changes.

6) Click Save located at the bottom of About Us Page Manager.

Contact Us:

Site Administration > Configuration Menu > 1. Initial Configuration > d. Contact Us

Most of the options on this page default to your Site Settings. The only options you need to configure are Contact Information and Locations.

1) Enter your information in the Contact Information field. Be sure to enter in the same format as per the example. It's not necessary to enter a Title and you can enter the name of a department instead of a person's name. It's also not necessary to enter a FAX or Email.

2) Enter you locations in the Locations field. Be sure to enter in the same format as per the example. Address 2 and Cross Streets are optional. You may enter multiple locations. Separate each location with a blank row using the enter key. PortalProdigy will create automated links to Map Quest using the addresses you enter. We suggest checking the addresses in Map Quest to make sure they work correctly. Sometimes Map Quest requires specific values for the street names.

3) You may also override the Search Engine Settings for this page.

4) Click Save located at the bottom of the page.

Broadcasting:

Site Administration > Configuration Menu > 2. General Components > a. Broadcasting

This feature is use to configure your websites email broadcaster which is used to send automated email notifications, newsletters, and manually configured bulk email broadcasts.

You only need to configure Administrator Notification Email Address and Sender Name. The other options have been deprecated (used only by older versions) and not used by the current version of PortalProdigy. Both Administrator Notification Email Address and Sender Name default to the values you entered in Site Settings. If you want to change these values do the following otherwise skip to the next Component.

1) To change the values uncheck the Inherit checkbox and enter the appropriate values.

2) Administrator Notification Email Address will be used as the default Sent From Email Address in your automated email notifications. A value is required.

3) Sender Name is the value that will be displayed in the Sent From Email Address in your automated email notifications. A value is required.

4) Click Save located at the bottom of the page.

Templates for automated email notifications are created using the Broadcast Templates feature. Once created, email notification templates are specified in their applicable feature management pages. See the Administrators Guide for additional Information about Broadcasting.

Companies:

Site Administration > Configuration Menu > 2. General Components > b. Companies

1) If you plan to display a Company Directory to permitted users, check each field that you want included in the directory then click Save located at the bottom of the page; otherwise skip this step.

2) If you plan to offer Credit Terms to customers, click Terms to open Terms Management page; otherwise skip this step.

   a) PortalProdigy comes with a set of predefined terms. You may edit these terms as well as add new ones. Terms are assigned to customers in Contact Management and Company Management.

   b) To add a new Term click Add New Item.

      i) Enter a Description.

      ii) Enter the number of Net Days from the date of Invoice to determine the payment due date without discount. E.g. 30

      iii) Enter the number of Grace Days allowed before a late fee will be charged. E.g. 15

      iv) Enter the Discount Days from the date of Invoice to determine the payment dues date with for customer to take a discount. E.g. 10

      v) Enter the Discount Rate as a percentage. E.g. 1.50 for 1.5%

      vi) Click Save located at the bottom of the page. Alternatively you may click Add New Item without clicking save. This will save the existing Term and add a new one.

      vii) Repeat the above steps for additional Terms.

   c) To edit an existing Term:

      i) Click on the Term.

      ii) Edit the options.

      iii) Click Save located at the bottom of the page.

Contacts:

Site Administration > Configuration Menu > 2. General Components > c. Contacts

1) Check each tab form (feature) to be included on Contact Management page. These tab forms allow viewing of the records associated with the user for the particular

feature. The tab forms also apply to the user's profile page, allowing each user to view their records. E.g. if you plan to offer Event Registration check Events.

2) Click Save located at the bottom of the page.

Countries & Exchange Rates:

Site Administration > Configuration Menu > 2. General Components > d. Countries & Exchange Rates

Countries Management allows you to specify which Countries are allowed for addresses. This applies to all addresses including billing and shipping. If you intend to use the Currency Widget it also allows you to specify a currency type and exchange rate for each country. The Currency Widget will only list enabled Countries. Enabled Countries are marked by a red asterisk.

1) To enable all countries for a specific continent:

    a) Check the continent checkbox.

    b) Click Update located at the bottom of the page.

2) To enable a single country:

    a) Click on the Country.

    b) Set Active to Yes.

    c) Click Close located at the bottom of the page and click Ok to confirm save.

3) To disable a single country:

    a) Click on the Country.

    b) Set Active to No.

    c) Click Close located at the bottom of the page and click Ok to confirm save.

4) To set the exchange rate for a country:

    a) Click on the Country.

    b) Enter the Rate. Base prices will be multiplied by this rate to determine the amount for the selected currency. Base prices are typically entered in USD but you can enter them as any currency.

    c) Click Close located at the bottom of the page and click Ok to confirm save.

Custom Options:

Site Administration > Configuration Menu > 2. General Components > e. Custom Options

This feature is enabled when your website uses a custom module; otherwise it is not used. If you have a custom module you will be given separate documentation for its configuration and usage.

Help:

Site Administration > Configuration Menu > 2. General Components > f. Help

This feature is used to configure the general help option available in Site Administration pages.

1) Enter a Help URL. This it typically a link to an instructional page. E.g. http://www.portalprodigy.com/main.asp?uri=1003&di=350&selID=

2) You may enter Help Contact Information either as text directly into the memo field or you may use the Editor option to enter and format.

3) Click Save located at the bottom of the page.

GL & Journal Entries:

Site Administration > Configuration Menu > 2. General Components > g. GL & Journal Entries

This is an advanced feature that is typically not used. For more information see the PortalProdigy Administration Guide.

Orders:

Site Administration > Configuration Menu > 2. General Components > h. Orders

If you want to conduct transactions on your website you will need to configure the applicable options on this page.

1) If you plan to ship product:

    a) Click on Shipping Carriers link located to the right of the Manage label.

    b) Click on a pre-defined Carrier to edit or click Add New Shipping Carrier.

    c) Enter the Shipping Carrier Name.

d) Enter the Carriers Tracking URL. This URL is used to track the status of a shipment.

e) Edit a pre-defined shipping Method or click Add New Method. As a time save you may copy an existing Method by clicking the + sign for the method to be copied.

f) Select a specific Country or select All Other. All Other will be used when a customer's ship to Country does not have a Method defined for that Country.

g) Select a specific State (or Province or Territory) or select All Other. All Other will be used when a customer's ship to State does not have a Method defined for that State.

h) Enter a description for the Method. E.g. Next Day

i) If the Method has a Fixed Fee enter the amount.

j) If the Method has a Minimum Fee enter the amount.

k) If the Method has a Rate Per Pound enter the amount; otherwise leave this set to 0. You may use a different measure of unit if you like. E.g. you may want to use classes such as 1, 2, 3, 4, 5. The shipping amount will be calculated by multiplying the Rate Per Pound by whatever value you enter into each Products Weight field.

l) If the Method is to be based on a % of Sales price rather than a Rate Per Pound enter the percentage; otherwise leave this set to 0.00. When you enter a value greater than 0 it will disable the Rate per Pound.

m) If the Method is to be Free if Order greater than or equal to a specific amount enter that amount.

n) Click the Save button located at the bottom of the page.

o) You may repeat the above steps for additional Methods and Carriers.

p) Click Close to return to Orders Features Management page.

q) Select a Default Shipping Carrier.

r) Select a Default Shipping Method.

2) Allow Unfulfilled Orders to be Invoiced? - Set to "Yes" to invoice order at time it is placed. Set to "No" to invoice order after it has been fulfilled and shipped.

3) Time Zone – set to your local time zone, e.g. "EST".

4) Allow adding to cart without login? – most organization set this to “Yes”. If you want to require the customer to login (or new users to register) prior to adding items to their shopping cart set to “No”. If you assign special pricing to customers using the Price Group feature, the customers will need to login to see their special pricing. If you require authorization to view and purchase any of your products customers will need to login to gain access to them.

5) Tax Calculation Method – set to “Item” to calculate sale tax separately on each taxable item. Set to “Order” to calculate sales tax on total taxable item amount.

6) Display Instruction Field? – set to “Yes” to include a field for customer to enter instructions with their order. Set to “No” to exclude this field.

7) Use new Print Order style? – This determines the style of the order displayed on the confirmation page. Set to “Yes” to display a style optimized for printing. Set to “No” to display a style optimized for appearance in the web browser. You can change this at any time.

8) Use THTML Shopping Cart? – Set to “Yes” to use one step checkout process. The one step process uses a THTML Style (template) that can be customized. Set to “No” to use a multiple step checkout process. The multiple set process used and XSLT style sheet that cannot be customized.

9) Allow orders for – if you want to collect company information for orders set to either “Company Only” or “Both”. If you don’t want to collect company information for orders set to “Individual Only”.

10) Response Notification Email – if you want to receive an email notification each time a new order is placed enter the email address here. It defaults to the email entered into Site Settings. To override uncheck Inherit. If you don’t want to receive and email notification leave the field blank.

11) Response Notification Template – select the email template to use. Email Templates are created using Email Broadcaster. See the Email Broadcasting Guide for details.

12) Order Phone – enter phone number to be displayed in checkout pages.

13) Order Policy Document – upload HTML file or use the HTML Editor to create a policies document (aka Terms & Conditions). A link to this document is included in Product Catalog and Checkout pages.

14) Order Confirmation Instructions – use to enter instructions displayed on the Order Confirmation page. Enter as text directly into the memo field or use the HTML Editor to create.

15) Request Quote Instructions – use to enter instructions displayed in Product Detail page as help icon for items that have Request a Quote instead of price.

16) Place a Bid Instructions – use to enter instructions displayed in Product Detail page as help icon for items that have Place a Bid instead of price.

17) Customer Order Status Page Title – use to enter a heading for the order status page. E.g. "View Orders and Shipment Tracking Status".

18) Customer Quote Status Page Instructions - use to enter instructions displayed on the quote status page.

19) If you will be collecting Sales Tax on orders:

    a) Click on Taxes located to the right of the Manage label.

    b) Click on a pre-defined Tax District to edit or click Add New Item.

    c) Tax Districts are determined as follows:

        i) Customer's Ship To Zip code is used to lookup the State and County.

        ii) If a Tax Rate has been defined for the State + County that rate is used;

        iii) Otherwise if a Tax Rate has been defined for the State without a specified County that rate is used;

        iv) Otherwise no Tax is charged.

    d) Create a record for each State + County that you need to collect tax for. If all Counties within the State charge the same rate you don't need to create records for each County; instead just create a record for the State.

    e) Rate is entered as percentage, e.g. 8.75

    f) Clicking Add New Item saves the current item and readies the page for the next item.

    g) When finished adding records, click Close and click Ok if prompted to save.

20) The Order Contact Us information is displayed on the printed order and the order confirmation page. This information defaults from Site Settings. To override uncheck Inherit and make changes.

21) Click Save.

Payments:

Site Administration > Configuration Menu > 2. General Components > i. Payments

If you want to conduct transactions and accept payments on your website you will need to configure the applicable options on this page.

When accepting credit card payments you have the option of configuring a credit card processor or you can manually process the payments.

1) The first step is to configure the allowable Payment Types. For each Payment Type you need to check the applicable options you want to enable:

    a) Pay Online – check to make this option available to customers at the time of purchase.

    b) Pay By Mail – check to display as accepted payment method for paying by mail. This option is most commonly used for checks where you withhold shipment until the check is received. It can be also used for COD for in-store pickups.

    c) Pay At Event – This only applies to events. Check to display as accepted payment method when you allow payment at an event.

    d) Pay On-Account – check to display as accepted payment for clients that are given credit terms.

    e) Authorization Required – check to require authorization prior to shipment. If a credit card processor is configured it will cause the payment type to be authorized as part of the checkout process.

    f) Address Required – check to require user to provide a Billing Address. This will require the customer to provide a credit card billing address during the checkout process.

2) If you plan to accept checks:

    a) Complete the Check Information section. To override the defaults from Site Settings uncheck Inherit and make changes.

3) If you plan to offer credit terms:

    a) Complete the Credit Terms section.

4) If you enabled the Pay By Mail option for any of the Payment Types:

    a) You may enter instructions that will be displayed on the order confirmation page.

5) Pay Pal Standard Payment Type is a payment method where the customer uses their PayPal account to make the payment. This method takes customer to the PayPal website to complete the payment process and returns them to your website upon completion. Before continuing with this process you need to have setup your account with Pay Pal. You will need to enter the Auto Return URL described below when setting up your Pay Pal account. To configure the Pay Pal Standard Payment Type:

   a) Mode – most clients only need to configure the live mode. If you have a Pay Pal sandbox account and want to use it to test your website you will need to enter configure it also. This option is used to switch between the two modes.

   b) Name – enter the name that want listed on your website for this payment method. E.g. PayPal

   c) Email of Merchant Account – enter the email used for your Pay Pal account.

   d) Pay Info: enter instructions that you want displayed on Pay Pals payment page.

   e) Token – enter the token provided by Pay Pal for your Pay Pal account.

   f) User Name – enter your Pay Pal account user name.

   g) Password – enter your Pay Pal account password.

   h) Signature – enter the signature provided by Pay Pal for you Pay Pal account.

   i) Auto Return URL – copy this URL to the Pay Pal website when setting up your Pay Pal account.

6) Card Authorization is used to configure a Payment Processor for automated authorization and processing of credit cards. To configure the Card Authorization:

   a) CSC Help Page – use to load an HTML page that provides customers with instructions for locating their CSC (Care Security Code) which is typically located on the back of their card.

   b) Automated Card Authorization – set to “Yes” to enable processing.

   c) Require CSC verification? – set to “Yes” to require customer to provide this.

   d) Gateway – select a payment gateway from list. This is typically set to “PayPal”.

   e) Approve when CSC cannot be validated? – set to “Yes” to allow payment authorization even though the payment processor could not verify the CSC provided by the customer.

f) Processor – this is used when you have chosen a Gateway other than "PayPal".

g) Approve when AVS cannot be validated – set to "Yes" to allow payment authorization even though the payment processor could not verify the billing address provided by the customer.

h) Perform Settlement Upon – select "Authorization" to

7) You can skip the Proxy section if we are hosting your website. If you are hosting your website on your own server and you use a proxy server you need to configure the Proxy.

8) Click Save.

Reporting Classes:

Site Administration > Configuration Menu > 2. General Components > j. Reporting Classes

This is an advanced feature that is typically not used. For more information see the PortalProdigy Administration Guide.

Roles Groups:

Site Administration > Configuration Menu > 2. General Components > k. Roles Groups

Use to define groups that users can be assigned to. There are three types of groups:

- Security – grants access rights to features and data records.
- Special Interests – identify users' interests. Use to filter mailing lists, filter searches, filter reports, etc. Special Interests can be specified as choices to offer users during the registration process as well as be specified as private for administrative use only. Use them to group users for any purpose.
- Role – define roles used by Sales Opportunities feature.

Your PortalProdigy website comes with several pre-configured Security Groups:

- Admin – grants full Edit rights to all features. This group cannot be deleted or modified. It is manually assigned to users to grant them full access to everything.
- Users – this group is automatically assigned to all users that register on your website. You may configure it as you please.

- Visitors – this group is automatically assigned to all users that are not logged in on your website. Use to control non-logged user access to features and records. This group cannot be deleted.

To create additional Security Groups to assign different levels of access to features and records:

1) Set Type to “Security”.

2) Click Add New

3) Enter a Group Name.

4) If you plan to grant access to administrative features, you can grant access to Admin Menus using the Admin Menu Selection:

    a) Click on a menu.

    b) Hold down the Ctrl key to click on additional menus.

5) For each Feature Component select one of the three choices (Features whose name begins with Administration are not meant for customers or public users):

    a) No Access – disallows user from accessing the feature.

    b) Read Only – allows the user to access the feature and view records without modifying them.

    c) Edit – grants user access to the feature with the ability to view, add, delete, and edit records.

6) Click Close and click OK to confirm Save.

7) Repeat process to create additional Security Groups.

To create Special Interest Groups, e.g. “Receive Newsletter”:

1) Set Type to “Special Interest”.

2) Click Add New

3) Enter a Group Name.

4) To display this group as an option when new users register check Display On Signup; if left unchecked the group will only be used for administrative purposes and non-administrative users (customers) will never see it.

5) Skip the Admin Menu Selection.

6) Click Close and click OK to confirm save.

For instructions regarding Roles see the User & Administration Guide.

Special Interest Groups:

Site Administration > Configuration Menu > 2. General Components > l. Special Interest Groups

This is the just another way of accessing the Groups configuration page same as Roles Groups menu option, so you can skip this.

User Signup:

Site Administration > Configuration Menu > 2. General Components > m. User Signup

Use to configure general signup (registration) and login options and to create one or more registration forms.

Configure as follows:

1) Login Page Instructions – use to provide instructions on login page. Instructions may be entered as plain text in the memo field or you may use the HTML Editor to create them.

2) Registration Form – use to select a default signup form. You have several options:

   a) Select "Use Default" – select this option to use the PortalProdigy's pre-defined User Profile for registering new users. This option is typically used when you want to collect extensive information such as for membership based websites.

   b) Select "Become a Member" – select this option when you want to display instructions, options, or use a Membership Type to register users. This option provides the most flexibility. When this option is selected you must use Become A Member Go To option to specify what to do.

   c) Select a Quick Registration form – you must first build a form using Quick Registration Builder. It will then be listed as a choice in the Registration Form list box which you can select. This option is best when you just need a simple registration form.

3) Become a Member Go To – this option displays the Link Management page where you will specify where the user goes to when they click New User Signup on the login page. Link Management choices include (option d is most common choice):

a) URL – use to enter a URL. This is a generic tool and this option is typically not used for this purpose.

b) Feature – use to select a PortalProdigy feature. This is a generic tool and this option is typically not used for this purpose. When used is most commonly set to “Membership Types Browse”.

c) Menu – use to select a PortalProdigy menu. This is used when you want to create a list of choices.

d) Feature Record – use to select a specific feature record such as a membership type or a document that provides options. This is the most commonly used option. Select the Feature using the list box then use the Lookup icon to select a record. You will probably need to the document or membership type first then return to this page to select it.

4) Password Minimum Length – select the minimum length that you require for passwords.

5) Signup on Login Page – use this option to control when the signup option is displayed:

a) Enable on all pages – select this option to always display a signup option when user is prompted to login. When a user clicks on a feature or record that requires the user to be logged in, selecting this option will cause the login page to display a new user signup option.

b) Enable on quick registration pages only – select this option to limit new user signup to transactions. Transaction include checkout for shopping cart, event registration, etc. When a user clicks on a feature or record that requires the user to be logged in, selecting this option will cause the login page to not display a new user signup option.

c) Disable – select this option to never display new user signup option on login page. This is typically used for membership based websites and web portals whose access is limited to pre-defined users.

6) Enable Captcha – Captcha displays a picture containing letters and numbers that must be entered into a text box to proceed. This is intended to stop automated bots (computer programs) from filling in forms. Set to “Yes’ to enable Captcha on all signup forms.

7) Enable Spam Filtering – this is intended to thwart spammers by looking up the zip code entered by the user and verifying that it matches the city and state entered by the user. We suggest setting that you initially set this to “No” because it requires user to enter exact city name that is the Zip to City and State mapping table

(database). Often users will enter abbreviations excepted by the Post Office that are not in the database and this can make the process frustrating for some users. If you experience spam registrations set to “Yes”.

8) Name Required on default Signup Up – set to “yes” to require user to provide their name when registering. This requirement also applies to User Profile page and Contact Management page.

9) Address Required on default Signup Up – set to “yes” to require user to provide their address when registering. This requirement also applies to User Profile page and Contact Management page.

10) Email Required on default Signup Up – set to “yes” to require user to provide their email when registering. This requirement also applies to User Profile page and Contact Management page.

11) Phone Required on default Signup Up – set to “yes” to require user to provide their phone number when registering. This requirement also applies to User Profile page and Contact Management page.

12) Default Contact Menu – skip this option for now. Contact Menus are user home pages creating with Menu Builder. This option is used to assign a default home page to every user when they register. Later you can create a default home page and return to User Signup to assign it.

13) Default Country – this value defaults from Site Settings. Uncheck Inherit to modify then select a Country from the list box. Set to blank to not provide a default. This setting sets the default value for every Country field in every page. If most of your activity is conducted in a single Country this feature is a time saver. To enable specific Countries on your website use the Manage: Countries option located at the bottom of this page. Note that you should have already configured Countries in a previous step within this guide.

14) Default State/Province – this value defaults from Site Settings. Uncheck Inherit to modify then select a State or Province from the list box. Set blank to not provide a default. This setting sets the default value for every State field in every page. If most of your activity is conducted in a single State this feature is a time saver.

15) Auto Broadcast Template – use to select a template for confirmation email notification sent to customer when they register. Email templates are created using Email Broadcaster.

16) Response Notification Email – enter an administrator’s email address to send an email notification to when a new use registers.

17) Response Notification Template – use to select a template for administrator email notification. Email templates are created using Email Broadcaster.

18) Sample Biography – allows you to provide an example to users when offering a bio page. This is typically used in conjunction with the Press Release Feature.

19) Sample Closing Statement – allows you to enter an example to users for the Press Release Feature.

20) Manage: Countries – provides and additional method of accessing Countries & Exchanges Rates which was previously described in this guide.

21) Manage: Contact Types – contact types are for internal use for categorizing contacts. Your PortalProdigy website includes a number of pre-defined contact types that are used by various features. You can define additional Contact Type for your own use:

    a) Click Contact Types.

    b) Click Add New Type.

    c) Enter a name for the Type.

    d) Click Save button.

    e) Repeat to add additional Contact Types.

22) Click Save button.

Congratulations! You have completed the General Components configuration process. The next step is to configure the Feature Components that you intend to use. Before proceeding we suggest that you review the PortalProdigy Features Guide to determine which features to use.