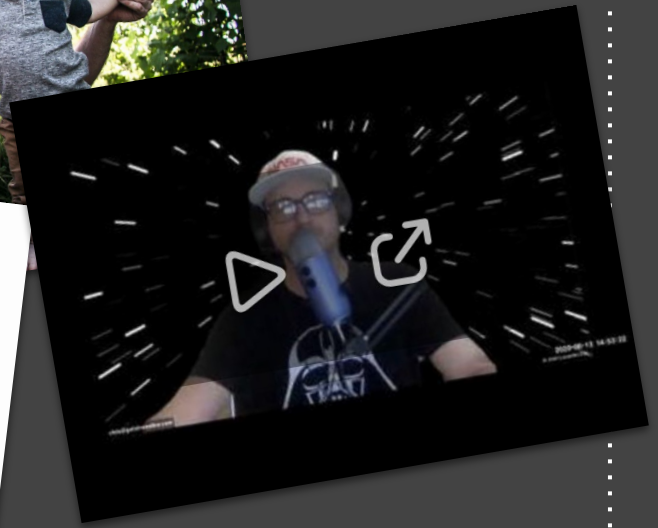
Streamline: Applications & Advanced Topics

Will begin soon...

How to engage

Audio Settings: to set speaker preferences.
Use the Q&A button to ask questions at any time, or chat us up!.
Raise your hand if you have any problems :)

Hello there!



Chris Ryan

Head of Customer Happiness

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(the little one is Luke!)

What we'll be covering

> User management and permissions

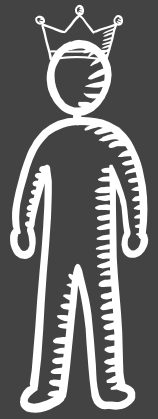
> Forms and managing submissions

> Information Architecture: high vs low level

> Landing pages!

> Sharing content with Engage

Concepts: Admin users vs Standard users



Admin Users

- Can log in
- Has at least one (1) permission

Standard Users

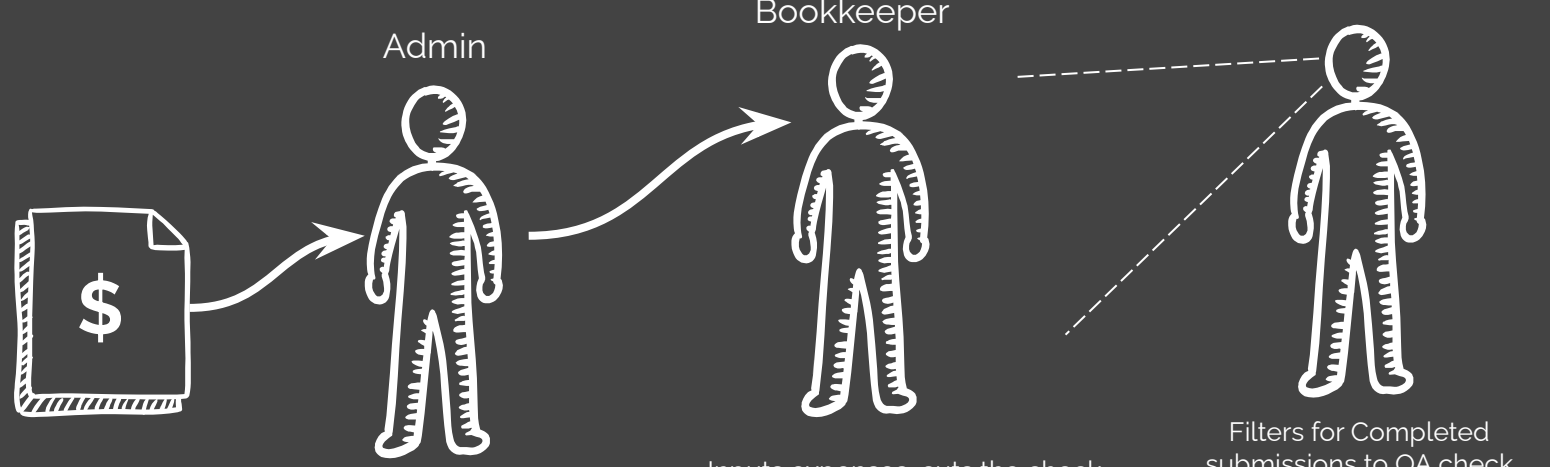
- Can log in
- Has no (0) permissions

Concepts: Web forms

Web forms can be added to any page on your Portal or Web site

Submissions can be assigned and processed internally

Concepts: Form assignments



Collects expense forms, checks for obvious errors

✔ If OK, **reassign** to Bookkeeper

🛑 If issue, **email** submitter

Inputs expenses, cuts the check

✔ If OK, **update status** to Complete

🛑 If issue, **email** submitter or **reassign** to Admin

Filters for Completed submissions to QA check

✔ If OK, **update status** to Archived

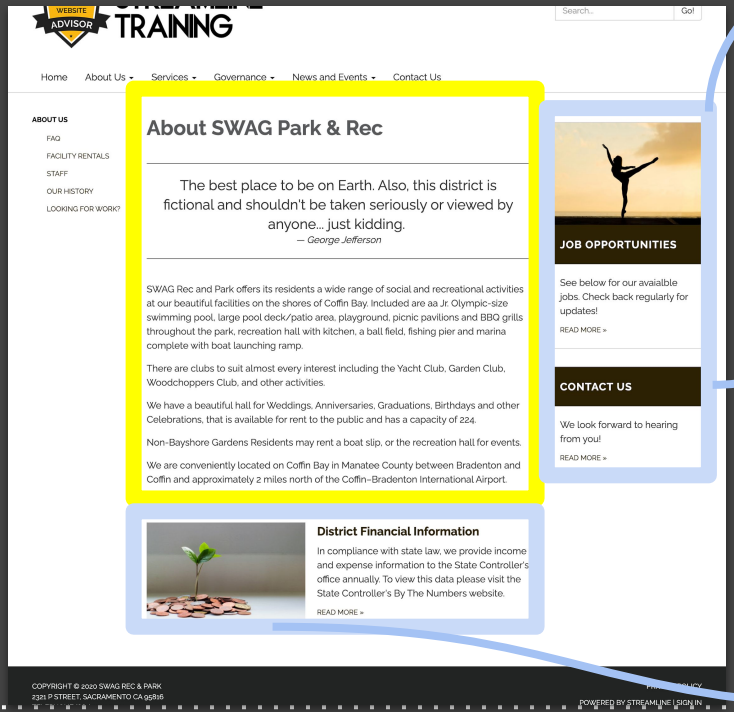
🛑 If issue, **email** submitter or **reassign**

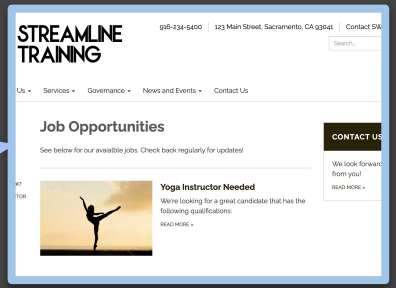
Concepts: Teasers

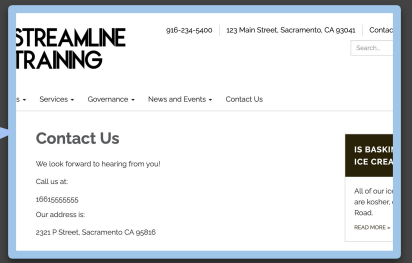
A page

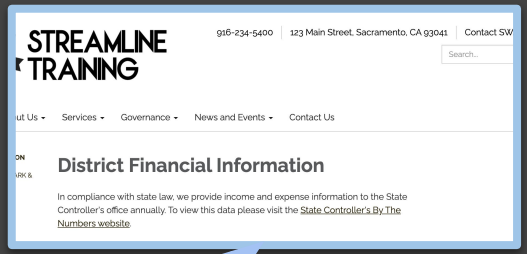
Main Content

Teasers









Concepts: Information Architecture

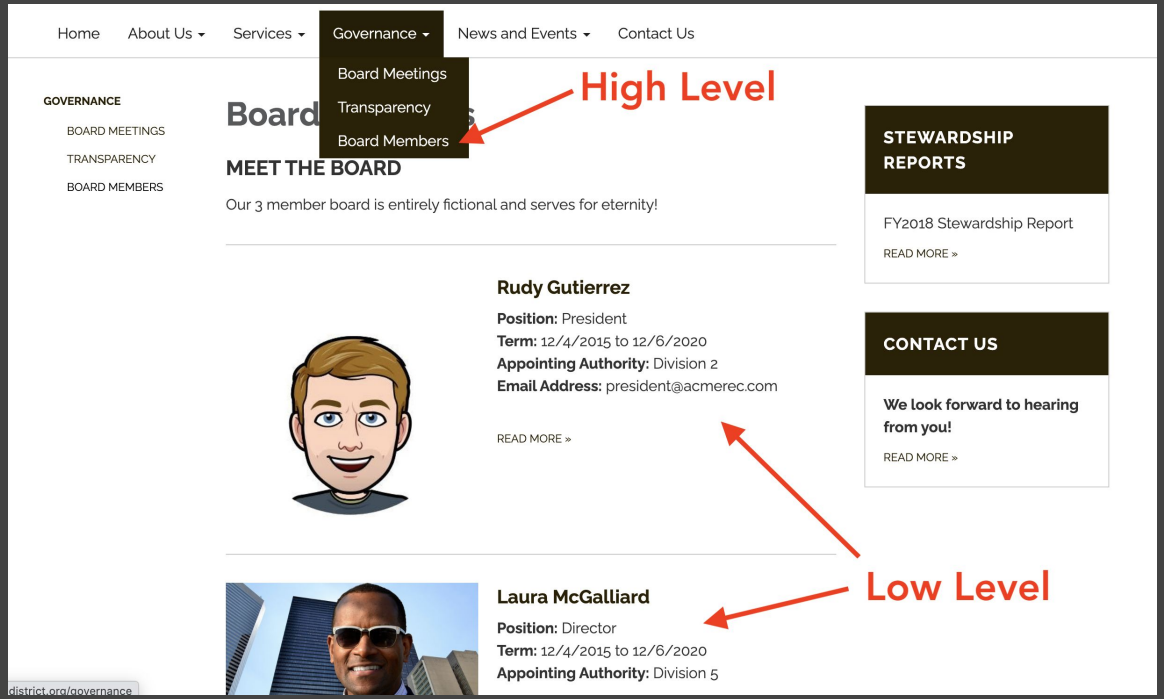
“High level”: menu navigation + home page

“Low level”: teasers + **landing pages**

Concepts: Information Architecture

High level = general

Low level = specific

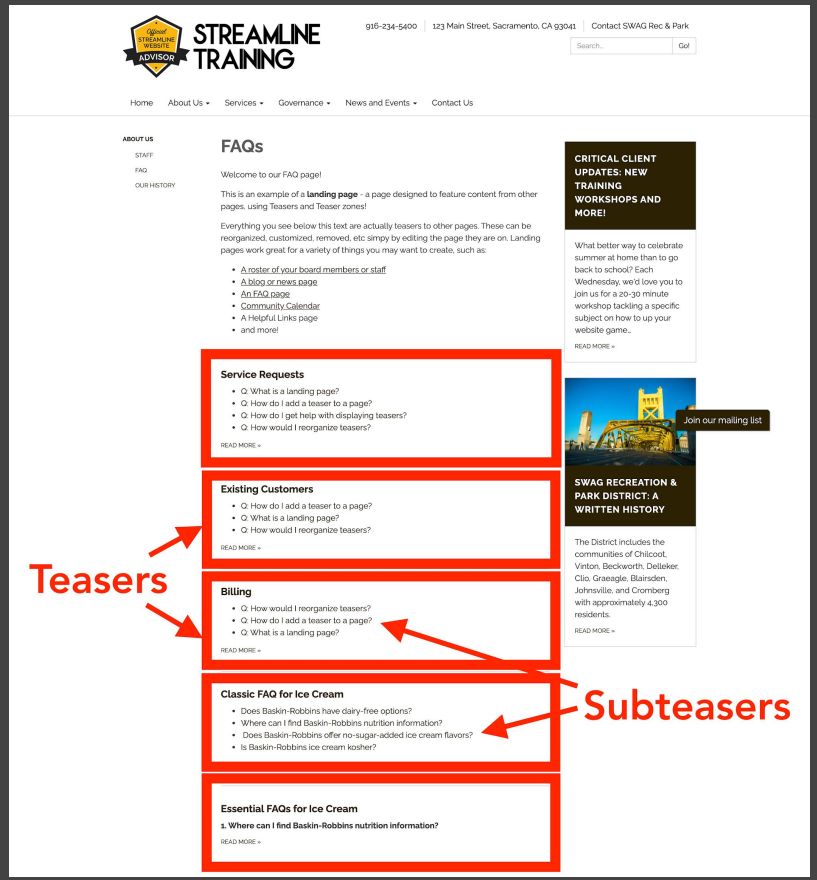


Concepts: Landing Pages

Below Main Body Content

Landing pages are essentially folders!

Perfect for “low level” organization



Concepts: Nested Landing Pages & Subteasers

You can create a Landing Page that displays other Landing Pages! We call these *nested landing pages*

By enabling **subteasers** you can directly display the teasers from your nested landing pages directly!

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Times (Pacific)	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
9:00				
9:30				
10:00	Office Hours		Platform Demo	
10:30				
11:00		Getting Started	Advanced Topics	Office Hours
11:30				
12:00		Office Hours	Office Hours	
12:30				
1:00	Getting Started			
1:30				
2:00				