

PortalProdigy Website Management Basics

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This guide covers the core things you need to know to operate your PortalProdigy website.

Hotkeys:

CTRL-ALT-M takes you to the main administration menu.

CTRL-ALT-E takes you to the feature management for the applicable page.

CTRL-ALT-D (in non-administration pages) puts you in design mode.

Note that only permitted users are granted access to the above features. Security Groups are used to assign permissions. Users are assigned to Security Groups in Contact Management. They can also be assigned automatically to security groups when they register on your website. An intermediary approval step can be included in the registration process.

Hotkeys work like shortcuts in Windows. To use Hotkeys press Ctrl-Alt and one of the following:

Key	Function
→	Next record
←	Previous record
Page Up	Page Up
Page Dn	Page Down
Home	Go to top of page
End	Go to bottom of page
A	Add new record
C	Close page or Clear criteria
D	Delete record when in administration. Access design mode in non-administration.
H	Go to Home page
E	Open Management page in Edit mode in

	non-administration.
P	Print page
M	Go to Main Menu page
N	Cancel
R	Reports page
S	Save record or Search
V	View Page

The Edit Hotkey is not available on all pages. Buttons on administrative pages have the Hotkey underlined.

Help:

Help is available in all design mode menus and in most administration pages. To access help in an administration page click on the ? icon located in the header as shown below.



The [PortalProdigy Support Center](#) contains a wealth of material to assist you.

List box Management:

You can add and edit list box values from any updateable list box directly in the page where the list box is displayed. This eliminates the challenge of locating the applicable management page. It also eliminates the hassle of leaving the current page you're editing to go to the list box management page and then returning. To add a value to a list box simply click on the list box to highlight it as indicated by the red arrow in the picture below. If the list box is updatable the List Box Editor will display the field name as indicated by the green arrow in the picture below. Some list boxes are not updatable because their values are hard coded in the system. Next click Add Value in the List Box Editor. This will open the applicable management page in a new browser tab. When finished adding the value be sure to save it then you may close the tab. Now click Apply Changes and select the newly added value in the list box.

The screenshot shows the 'Item Management' interface. On the left is a 'Main Administration Menu' with options like 1.Contacts, 2.Companies, 3.Orders, 4.Billing, 5.Payments, 6.Products, 7.Marketing, 8.Documents, 9.Reports, 10.Dashboard, 11.Other Features, 12.Site Settings, 13.Web Pages, 14.Tools, and 15.Utilities. The '6.Products' section is expanded, showing sub-options: a. Add New Item, b. View & Edit Items (highlighted), c. Product Catalog Builder, d. Inventory Entry, e. Inventory Adjustments, and f. Settings. The main content area is titled 'Item Management' and contains several sections: 'Page Settings' with a 'Use:' dropdown set to 'Other' and 'U Pick Product Details'; 'SEO Settings'; 'Item Description' with fields for 'Feature:' (Products), 'Type:' (Product), and 'ItemID:' (1074); and 'Product Description' with fields for 'Product Name:' (Used 1998 Toyota Corolla 2 door Front Clip), 'Product Code:' (ODSU-23), 'Product Type:', 'Manufacturers:' (a dropdown menu), 'Manufacturers Model Number:', 'Manufacturers Product Code:', 'Colors:', 'Pricing Method:' (Request Quote), 'Sales Price:' (\$58.00), 'List Price:' (\$0.00), 'Cost:' (\$0.00), 'Unit type:', 'Shipping Weight:' (0.00), 'Costing Method:', and 'Sizes:'. A green arrow points to the 'Manufacturers:' dropdown menu, and a red arrow points to the 'Edit Value' button in the 'Manufacturer List box' on the right. The 'Manufacturer List box' also includes 'Add Value' and 'Apply Changes' buttons.

To edit a value first select the value in the list box then click Edit Value in the List Box Editor. The value will be opened in a new browser tab in the applicable management page. Change the value and click save then close the tab. Click Apply Changes to update the selected value.

Page Settings and Templates:

Before you start configuring your website we suggest that you read the [Profiles Guide](#)

If you plan on customizing or creating your own templates you should read the Web Designers Guide

SEO:

Before you start configuring your website we suggest that you read the [SEO and Human Readable URL Configuration Guide](#)

Google Analytics and Web Logs:

To setup Google Analytics you must first create an Analytics account with Google. Copy the Google Analytics Tracking script and paste into the Script field in Site Settings Management. Save the page. That's it.

You may also download the web logs from the *Site Administration > Utilities Menu > 1. Utilities > b. Download Files*

The files are created at weekly intervals. You can use your favorite web analytics tool for analyze them.

Registering Users or Customers:

Although not required, it's recommended to use Membership Types when registering users because they provide more options and allow you to determine the access rights assigned to the user. You may create different Membership Types for different purposes such as shopping cart checkout, newsletter signup, reseller application, volunteer, etc.

To create Membership Types go to *Site Administration > Main Administration Menu > 11. Other Features > g. Membership Types*

See the online help for additional information about Membership Types.

Feature Configuration:

The first step is to complete the configuration process. Follow the steps outlined in the [Getting Started with PortalProdigy Guide](#)

Once the features are configured you are ready to go to your home page and enter design mode and start designing your website.