

Catalog Set-up and Post Checklist

Item	Description	Location
Catalog Admins	Add Catalog staff directly through the portal	Dashboard -> Users
Item	Description	Location
Select "Catalog" from your dashboard to update your Catalog. Click "Edit" from a page or section as you view the Catalog to go straight to the edit function.		
Company Logo	Upload a logo file – 220 px W x 210 px H	Catalog -> Catalog Setup
Company Description	Add a 1-2 paragraph description about your company.	Catalog -> Catalog Setup
Keywords	Enhance your searchability by adding keywords. Add keywords that help identify your company	Catalog -> Catalog Setup
Catalog Background	Select a color or image for the Catalog background or keep the one provided – 2000 px W x 1300 px H	Catalog -> Catalog Setup
Header Contact	Add an individual as a main point of contact or use the "First" and "Last Name" fields to enter "See Contacts Page". Most companies use this option since there is more than one point of contact	Catalog > Header Contact
Contacts Page	Add your company contact information. There is one dedicated page for each agency partnership	Catalog -> Pages -> "View" button to locate the correct page
Banner	Upload banner files. Images are 1380px W x 285px H, can have hyperlinks and rotate automatically. Limit six (6)	Catalog -> Sections -> Banner
Content Posts (Appetite Guides, Success Lists, Marketing Materials, Videos, Event Invites, Newsletters and more)	Add content posts to inform agents. Upload files or display your information in the description area. <ul style="list-style-type: none"> • Select a post type (Appetite Guide, Success List, etc.) • Add a title and optional subtitle • Enter keywords • Upload a file or use the text and graphics editor • Allow posts to be downloaded or shared by email • Select Spoke Portals to receive the post • Upload a thumbnail image to display on your Catalog • Click "Post Now" 	Catalog -> Posts
Event Post / Calendar	Event posts display in your Catalog, and site calendar. <ul style="list-style-type: none"> • Select a post type (Live Webinar, In-Person Event, other) • Add a title and optional subtitle • Enter keywords • Use the text and graphics editor to describe the session • Upload a thumbnail image to display on your Catalog • Add the date and time and select "Register on this Site" • Add the session web link • Post now 	Posts -> Event
Post Sections	Organize your content into sections. Each section contains rows and will display five (5) pieces of content horizontally, with scrolling allowed	Catalog -> Sections -> Post