Broadridge Advisor Solutions

AdvisorStream + Website Manager | Ready for Next

Adding AdvisorStream content to your website

This guide will show you how to add AdvisorStream content to your website using Website Manager.

Broadridge®

About this guide

This guide will cover the following processes:

- How to generate RSS code on **AdvisorStream**
- How to add **AdvisorStream** code to **Website Manager**
- How to share content from **AdvisorStream** to **Website Manager** (and your website)

After going through this guide, you will have successfully set up a feed that allows you to pass content from **AdvisorStream** to **Website Manager** (and your website). This feed makes the content sharing process incredibly quick and simple: a few clicks and the new content is on your website in real time.

As shown on the previous page, each step is numbered in order. However, to accommodate all levels of comfort with our platforms, you can also use this Quick Navigation tool to skip to later sections of this guide with a click.

The goal of this document is to get **AdvisorStream** and your website to talk through **Website Manager**. This might sound complicated, but if you know how to copy and paste, you can set this up in minutes.

During this process, you will use two websites. We recommend keeping both websites open (whether in different windows or tabs) during the entire process. It will save you time.

If you're unaware, you are logged out of **AdvisorStream** and/or **Website Manager** after a reasonable idle period. We recommend completing this tutorial in one session to avoid this frustration.

Bold, *italics*, and colors are used to guide your attention through the document, and do not correspond to specific classes or actions. Do not overthink why something is formatted a certain way. This document is designed to have multiple identifiers for each action, to accommodate all user types.

You now have everything you need to continue to the first step: **Generate RSS Code**.

AdvisorStream: Generate RSS Code

Getting different web platforms to talk to each other can be difficult. This is where the RSS code comes in. RSS is a web-standard that allows one platform to push content to another platform, and Broadridge has integrated this seamlessly into our systems. Once sharing is set up via an RSS *feed*, it takes only a few clicks to push **AdvisorStream** content onto your live website.

First, we will start in **AdvisorStream**, where we will generate and copy the RSS code. Starting from the **AdvisorStream** home page, click your Account name in the upper-right corner of the screen. From here, click **Account & Settings**.
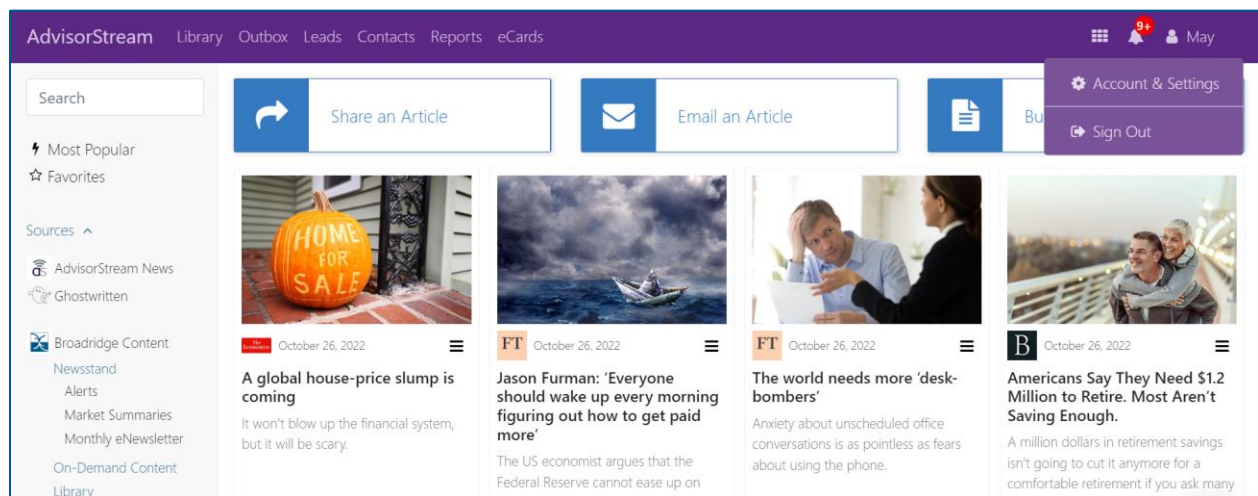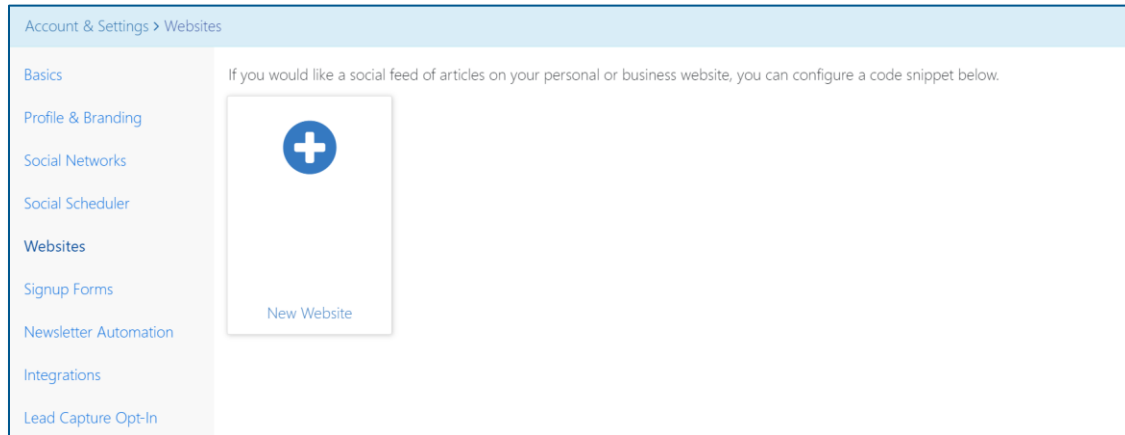

The first page you will see is the *Basics* area of **Account & Settings**. This is where you can view and change your username, password, and other, more administrative fields.
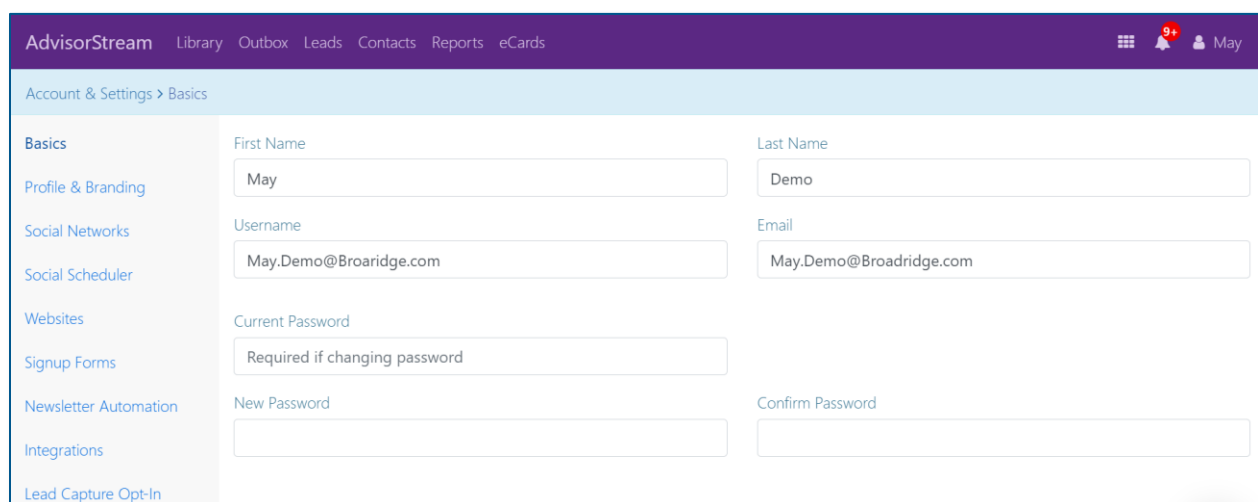
However, we are interested in a different page. Click **Websites** in the left menu.

This tutorial assumes you have never been to this area. If you have previously used this section to generate RSS code, you will see a tile (or tiles) available to edit or delete. For the purposes of our guide, we will start from scratch. Click the **New Website** tile (look for the blue **+** symbol).
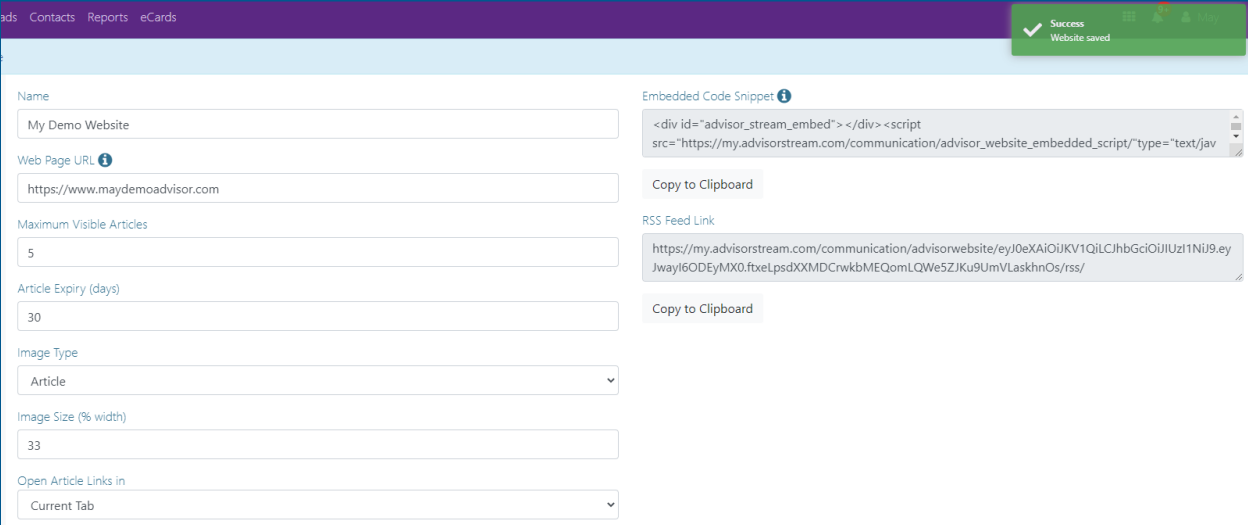

- Enter a simple, identifiable name into the **Name** field.
- Enter your website address into the **Web Page URL** field.
- Enter the number of **Maximum Visible Articles** you want to display on your **Website Manager** website. By default, five articles will be shown.
- Enter how many days you want an article to remain on your website in the **Article Expiry (days)** field. By default, articles will remain on your website for 30 days.
- Check the box if you want to write a custom introduction to each article, or leave it unchecked to use the article's summary as the introduction. Please note that custom messages may require your internal compliance department's approval, or may be disabled entirely, depending on your Broker-Dealer's settings.

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There are a few options that won't impact anything on your website. These are *Image Type*, *Image Size*, and *Open Article Links In*. Changing these options won't update anything on your **Website Manager** website.

Now, to get the RSS code. Click the **Copy to Clipboard** option below the RSS Feed Link box to get what you need from this page. Clicking this button will pop-up a green confirmation message that the code was copied.

After copying the RSS Feed Link code, click the blue **Save** button on the lower left side of the window. Please note that this will not close the window. You will see a green confirmation message in the upper-right corner.


That's everything we need from **AdvisorStream** for now. As we will be returning to **AdvisorStream** later in this document, we recommend you keep this window/tab open.

Website Manager: Add AdvisorStream Section

Now that we have the RSS code copied to our clipboard, we are ready to head on over to **Website Manager** to create the area where **AdvisorStream** content will appear. If you have not already, log in to **Website Manager**.
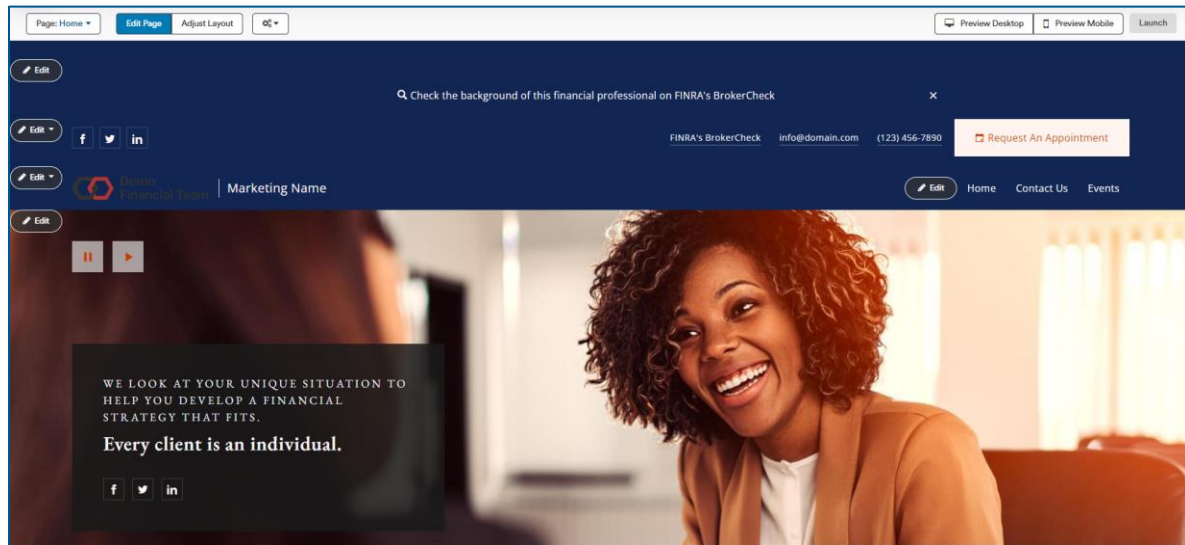
Above: An example of the editor within Website Manager. You need to be within the editor module of Website Manager to complete the next steps. This can be reached by clicking Edit my website in the left menu.

Our first step will be to add a new section to your homepage specifically for **AdvisorStream**. In the gray bar running across the top of your screen, click **Adjust Layout**.
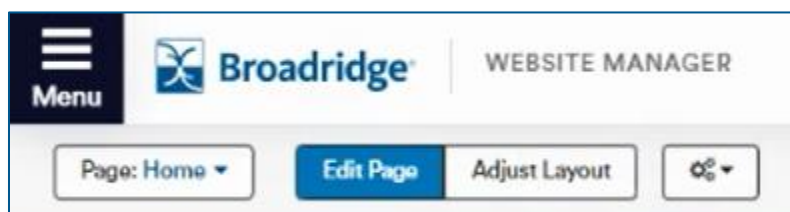

Above: Adjust Layout is located on the left-side of gray bar mentioned previously.

A new window will pop-up, displaying available website sections on the left, and currently selected websites sections on the right.

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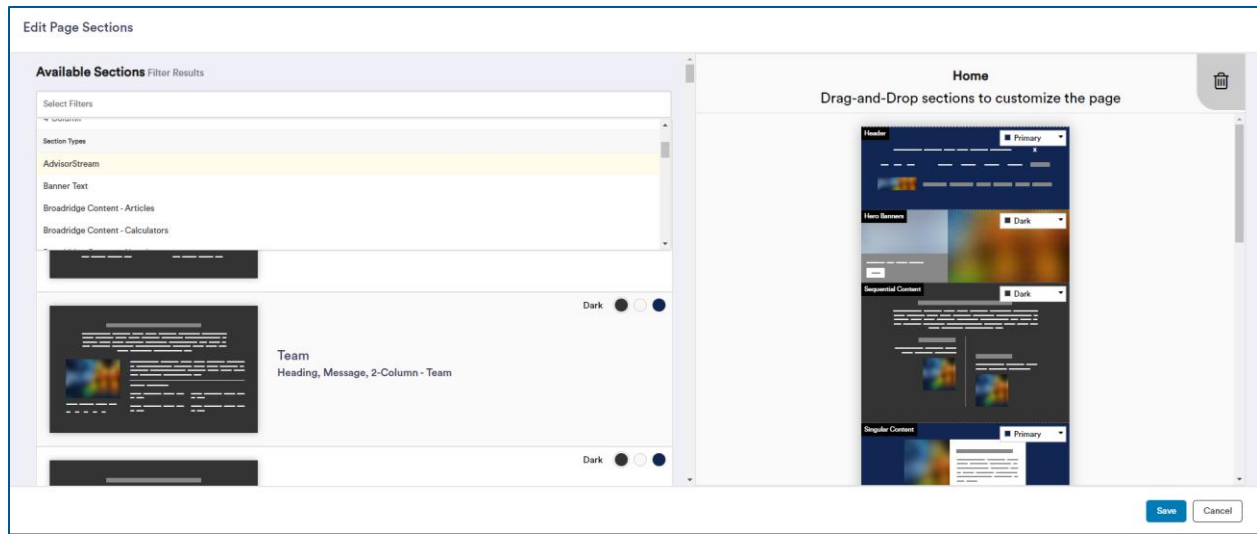
It's easiest to use the search bar, which will auto-complete as you type *AdvisorStream*. You can also click on the search bar for a drop-down menu, and find the section that way. There are two unique **AdvisorStream** layouts for you to choose from, as well as three colors. These layout/color choices do not affect what content will display.
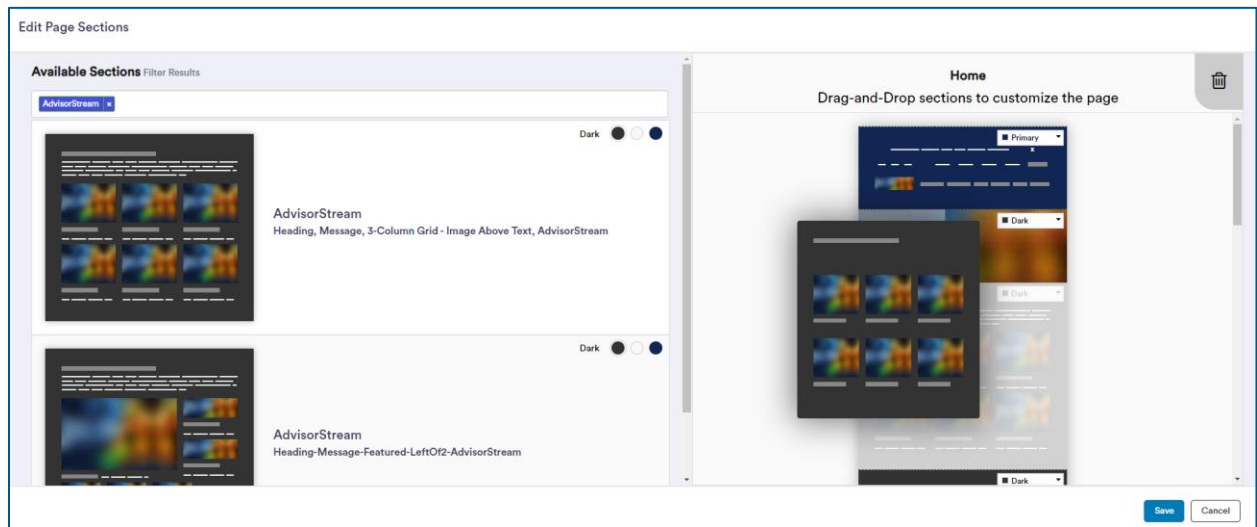
To add a section, simply click and drag it from the left column to the right column. Toggle the background color of the section by using the little drop-down menu, available in the upper-right corner of each section in the right column. You can rearrange sections by dragging them up or down.

Once you have the **AdvisorStream** section added, click the blue **Save** button in the lower-right corner.

Website Manager: Add RSS Code

With the **AdvisorStream** section added, we can now add the RSS code. This is the final step before your era of easy content sharing begins!

Scroll until you find your **AdvisorStream** section, and click the corresponding blue **Edit** button. As your homepage may have many such buttons, if you are having trouble, just hover your mouse over any Edit button and a helpful identification flag will pop-up.
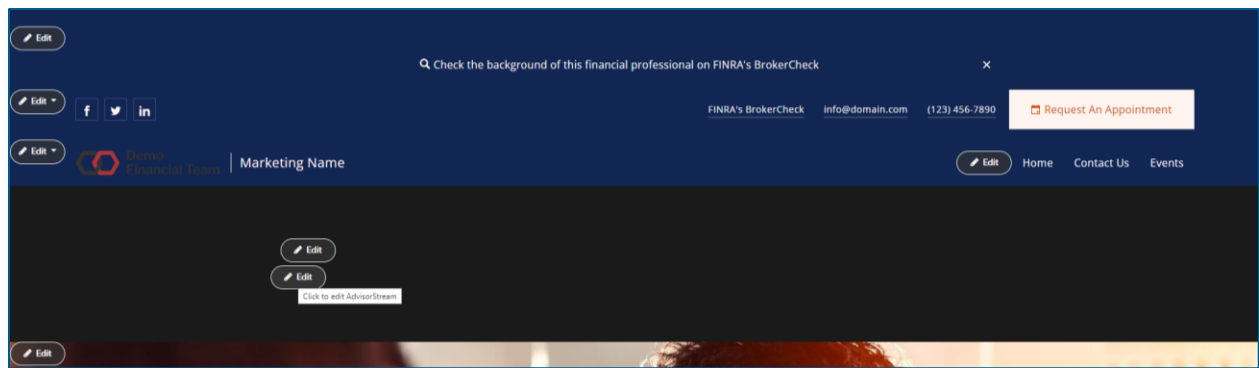
After clicking the **Edit** button, a panel will open from the right-side. If you've added this section previously, there will be entries in this library. Again, for the sake of this document, we will assume you are a new user.

Click **+Add New** near the top of the panel.
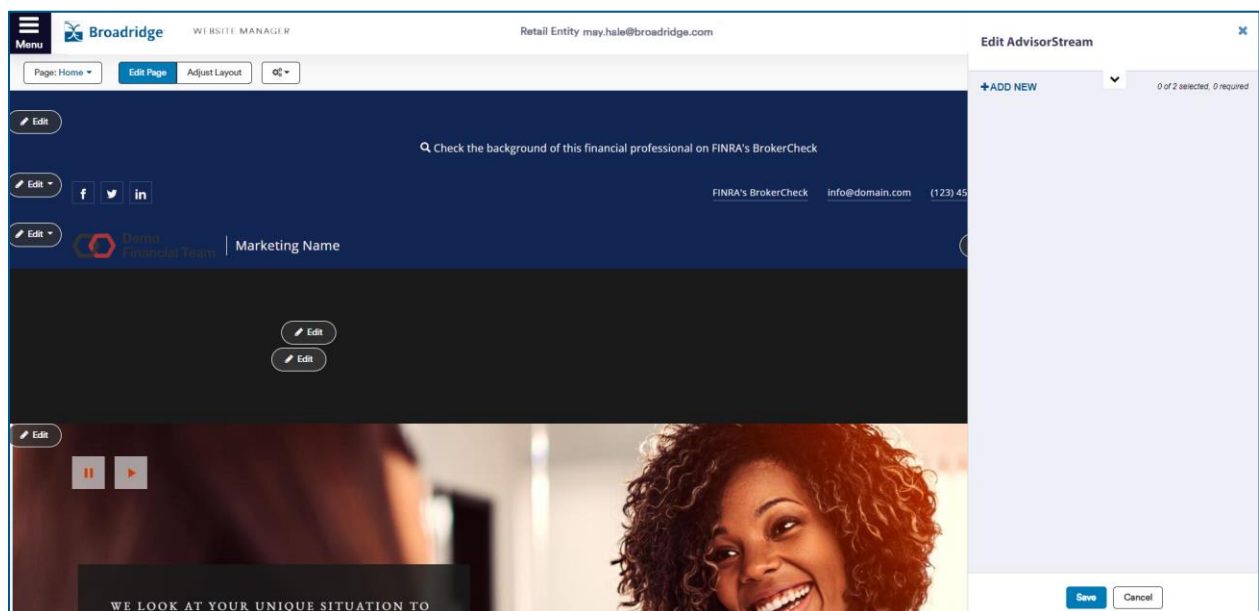
There are only two fields on this page: **Nickname** and **RSS Feed Link.** Both are pretty self-explanatory, but just so we are all on the same page:
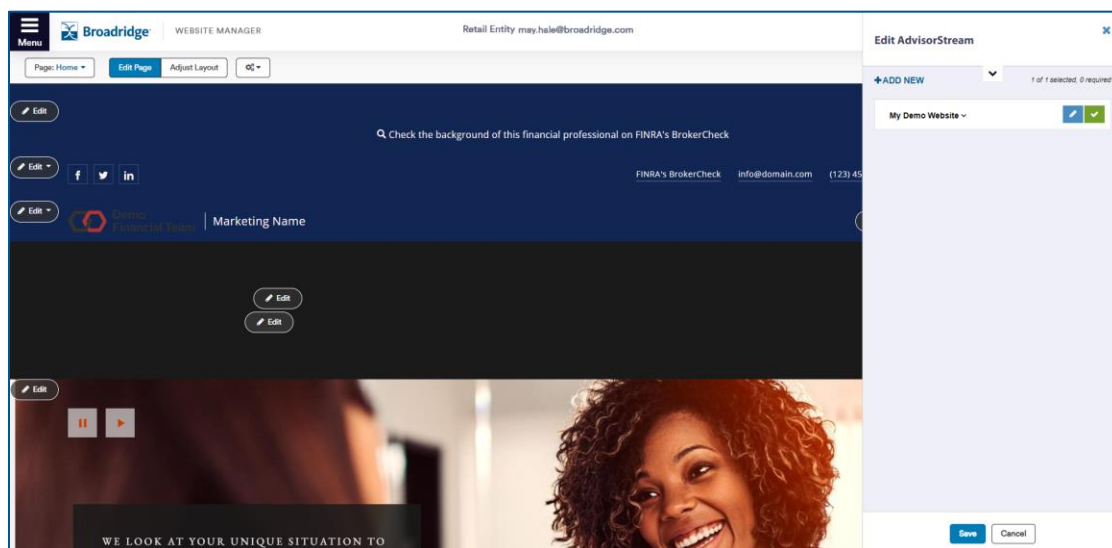

- **Nickname**: enter an identifying name for this entry. This doesn't appear anywhere on your site and is purely for assisting you in the future. We recommend using the same nickname you gave your website when we were generating the RSS Code in **AdvisorStream**.

- **RSS Feed Link**: paste your copied RSS code here. That's all you have to do. Don't alter the code in any way or the feed won't work properly.

Click the blue **Add to Library** button at the bottom once you are finished.

Back out in the library panel, turn your new entry on by clicking the checkmark, turning it green. Then click **Save** at the bottom of the panel.


You are now ready to share content to your website. Let's go back to **AdvisorStream** and walk through this quick and simple process.

## AdvisorStream: Share Content to Website Manager

Once you have added the RSS code to the **AdvisorStream** section in **Website Manager**, you are good to share content. Let's return to **AdvisorStream** and we'll walk through how simple it is to push content to your website now that you've linked everything with RSS code.

Back on **AdvisorStream**, navigate to the **Library**.
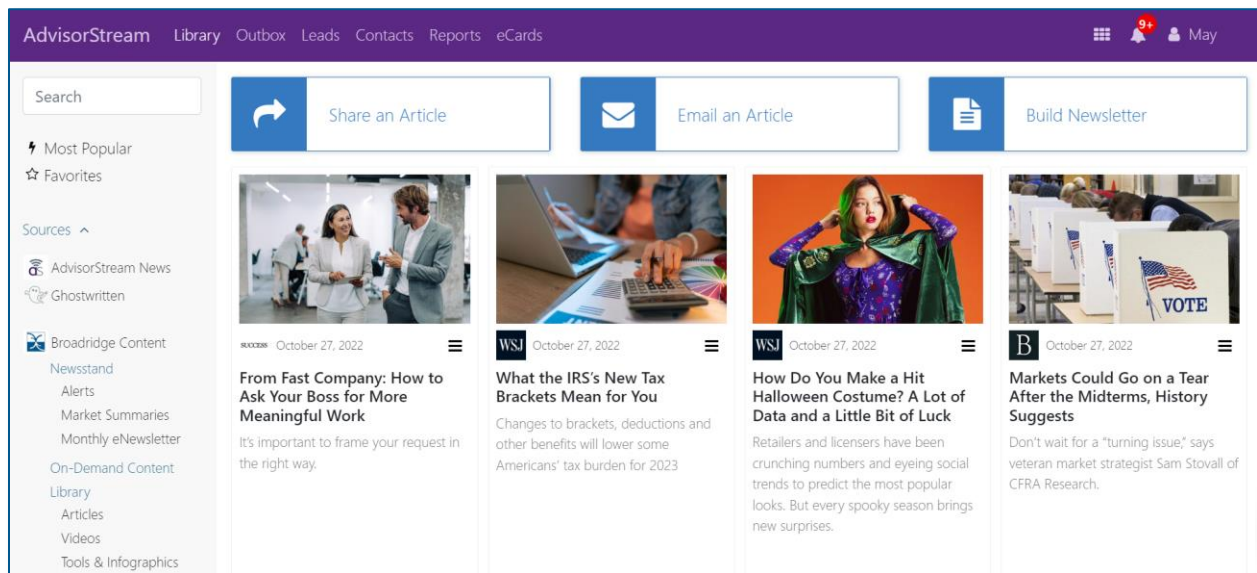
Find the article (or video or infographic, etc) you want to share. There are a variety of search and filter options on the left-side of the screen.

Click the **hamburger menu** (≡ symbol) within the tile you want to share on your website. Then select **Share Article** from the menu that pops-up.
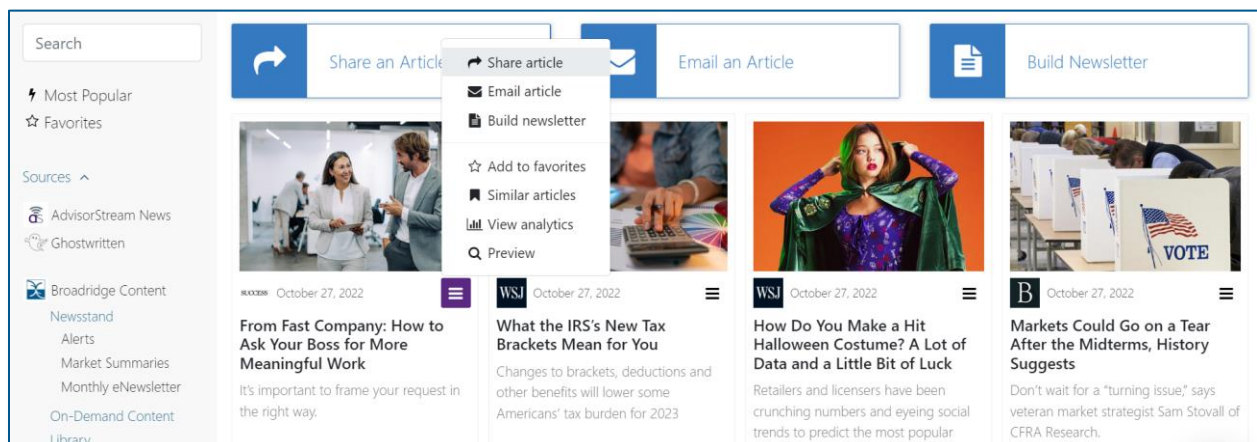
This will open the sharing panel for that specific article. While your *Persona & Branding* are pre-filled, you will need to select the webpage where you are sharing this article.
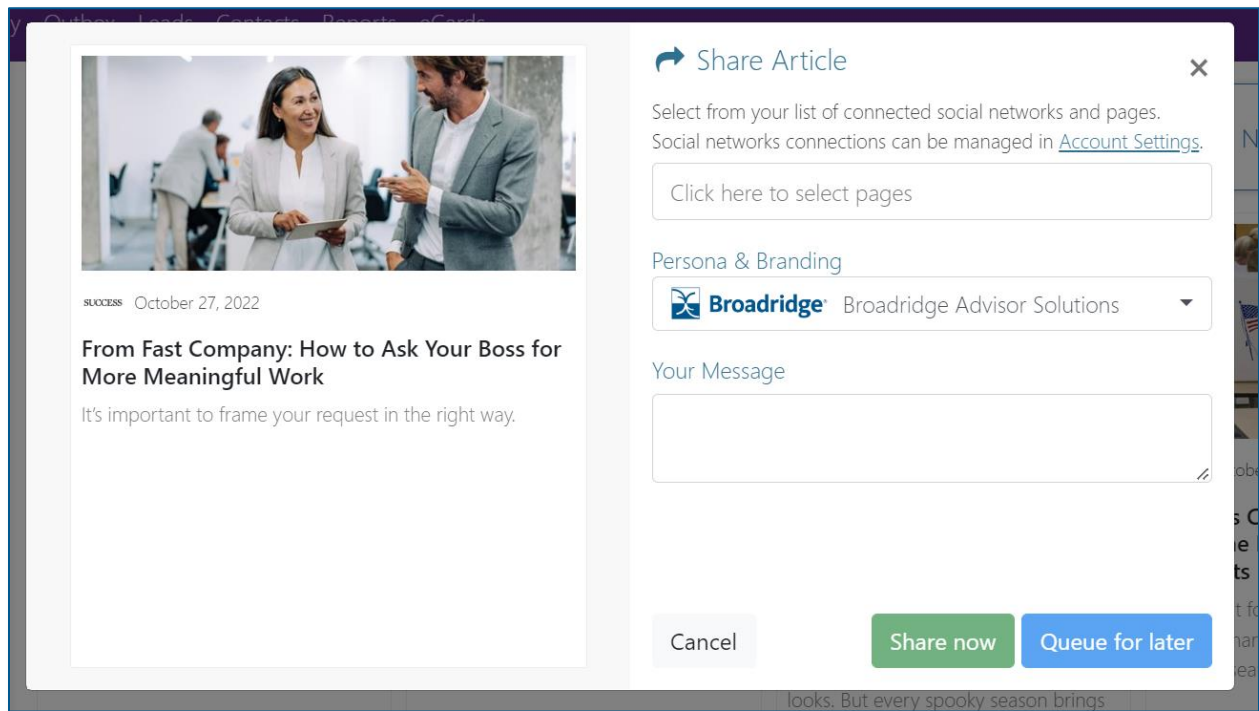
Click the top-field, the one titled *Click here to select pages*, to open a drop-down menu. The tile we added earlier under the **Websites** tab (along with any other webpages you added) will appear under this menu, in alphabetical order according to their identifying *Name*. You will also see a **Select All** option if you'd like to share the content to all of your RSS feeds.

Optionally, enter a short, plain text **Message** to appear with the content on your website. Custom **Messages** may require compliance approval. Remember, you had to select the custom message option when setting up the **AdvisorStream** side of things (explained in: Generate RSS code) for this option to be available to you.

After filling out the appropriate fields, you can click the green **Share now** button to send the content to your live website immediately, or select the blue **Queue for later** to save the content to your **Outbox**, for future editing or sharing.

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Clicking **Share now** will close the pop-up and a green confirmation message will appear in the upper-right corner of the screen. The content will be sent to the **AdvisorStream** section of your live website via the RSS code you added to **Website Manager**.	
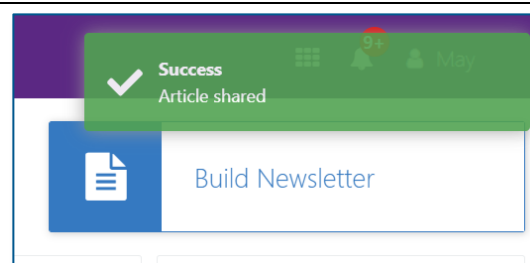
The final step in the process is to verify the content was shared to your website. To do this, we will pop back over to **Website Manager**.

Website Manager: Verify Content was Shared

Finally, let's return to **Website Manager** and navigate to the editor portion, as before.
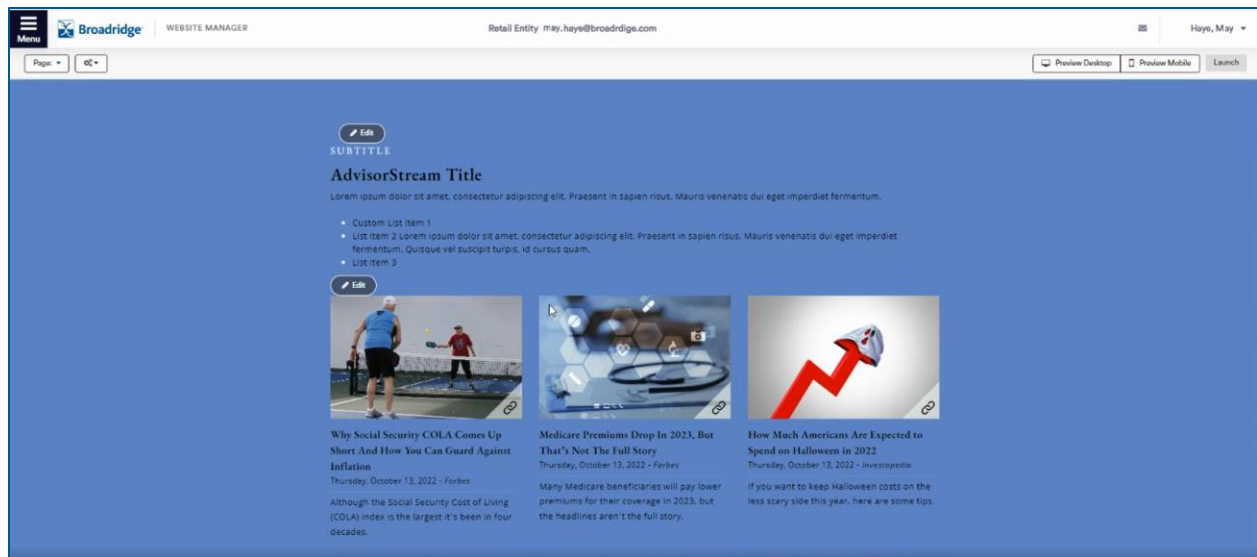
If you don't see your content, you probably just need to refresh. Hit the refresh button in your browser window/tab (or the F5 key on your keyboard) to reload the page.

If you do see your new content, congratulations! Feel free to share as much content as you'd like.

Thank you for reading.

Click this link to return to the Quick Navigation section.