

# 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**.

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## About this guide

This guide will cover the following processes:

- How to add your Broadridge Website as an option in **AdvisorStream**
- How to add an **AdvisorStream** section 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.

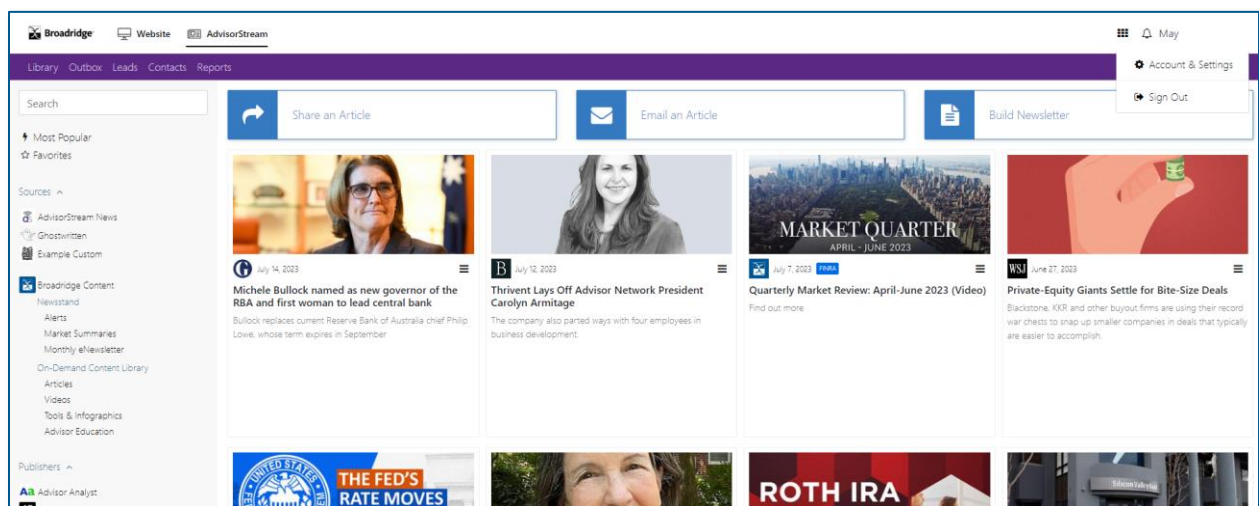
You now have everything you need to continue to the first step on the next page: **Connect Broadridge website**.

# Broadridge Learning: AdvisorStream + Website Manager

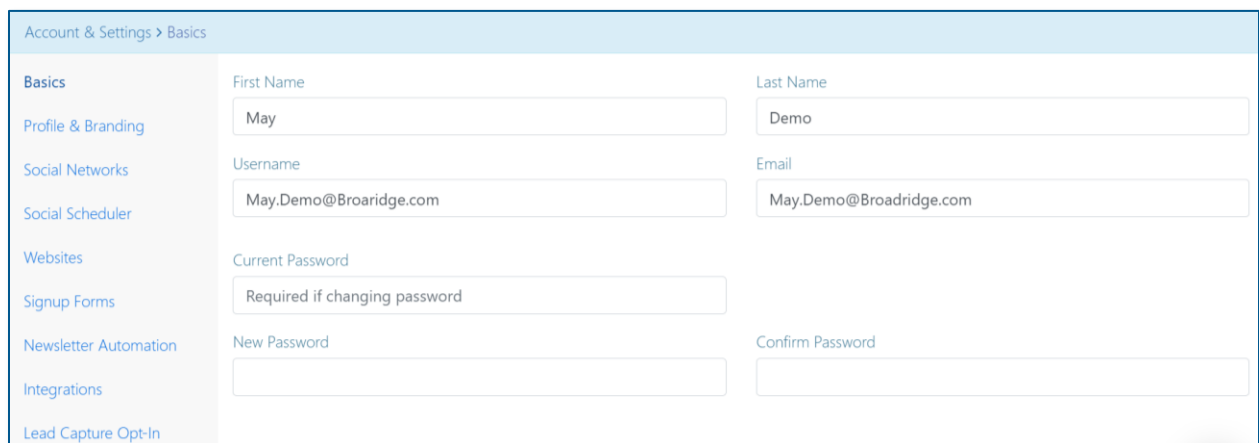
## AdvisorStream: Connect Broadridge website

Getting different web platforms to talk to each other can be difficult. **Broadridge** and **AdvisorStream** have created a seamless, integrated solution to accommodate platform communication. Once sharing is set-up, it takes only a few clicks to push **AdvisorStream** content onto your live website.

First, we will start in **AdvisorStream**, where we will connect your **Broadridge** website to your account. Starting from the **AdvisorStream** home page, click your *Account* name in the upper-right corner of the screen. From here, select **Account & Settings**.

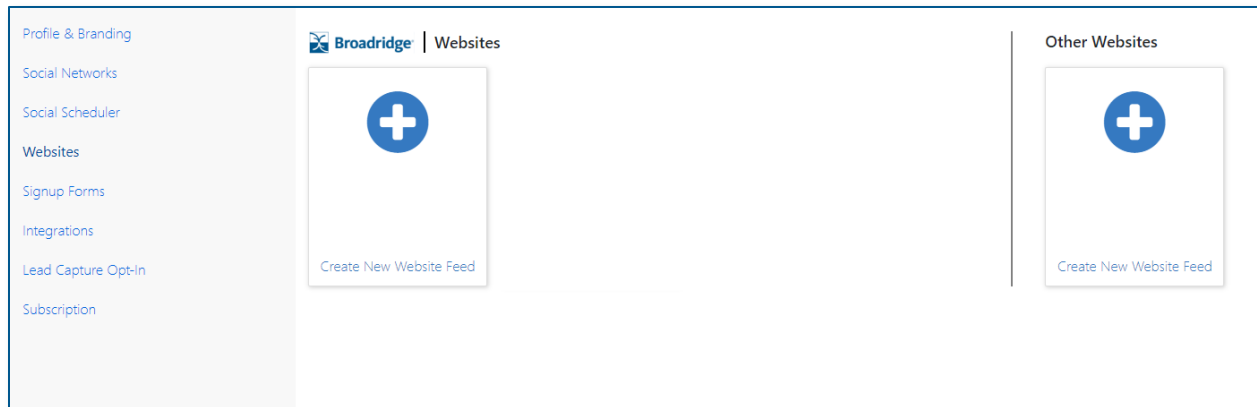


Depending on your settings, the first page you will see is likely the *Basics* area of **Account & Settings**. This is where you can view and change your username, password, and other, more administrative fields. Your default view may also be different from this.

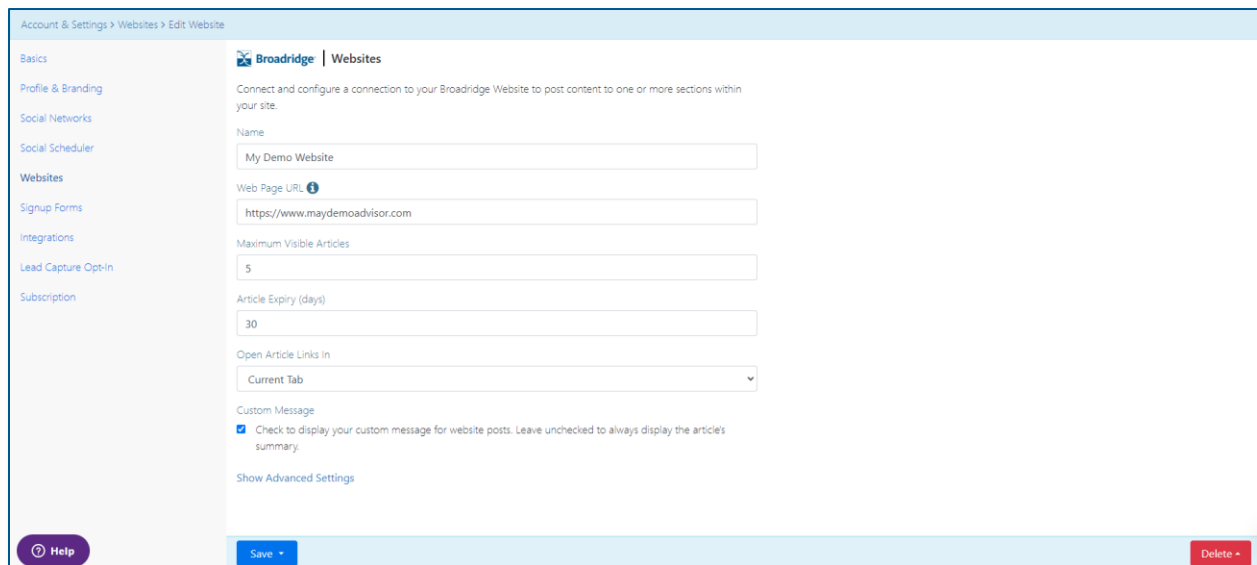


Regardless of your view, we are interested in one specific area. Click **Websites** in the left menu.

# Broadridge Learning: AdvisorStream + Website Manager



If you have previously used this section to connect a website, 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) under the **Broadridge | Websites** header.

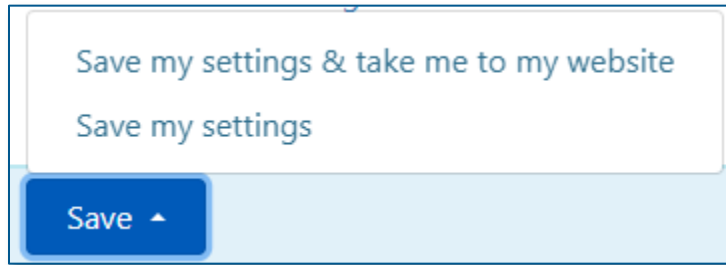


- Enter a simple, identifiable name into the **Name** field.
- Enter your website address into the **Web Page URL** field.
- Enter the number of **Maximum Visible Articles** you want to display on your **Website Manager** website. By default, five articles will be shown.
- Enter how many days you want 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.

# Broadridge Learning: AdvisorStream + Website Manager

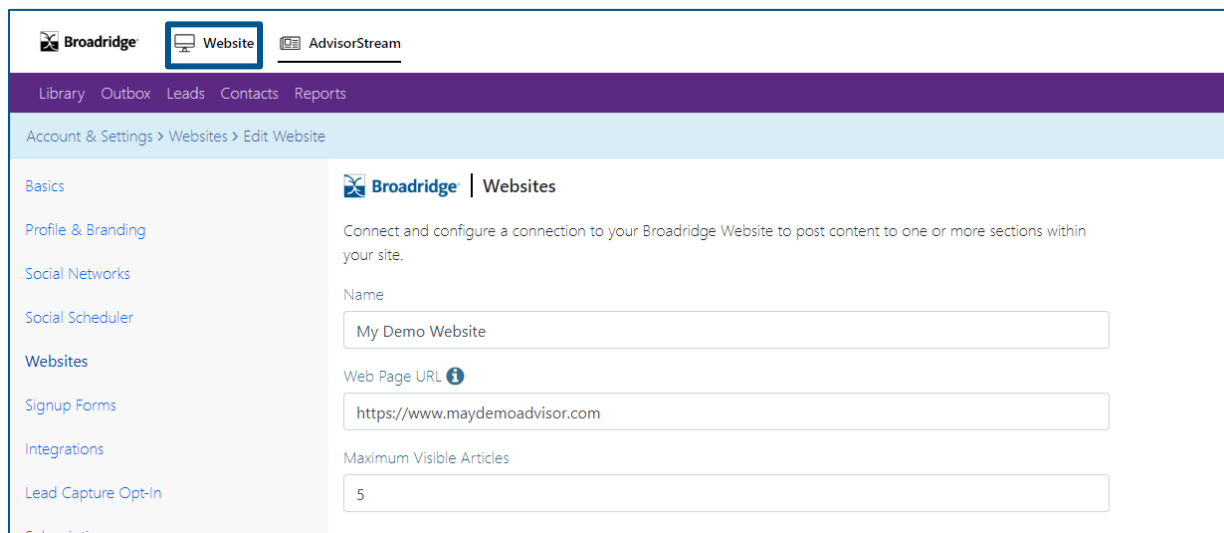
You may notice the *Advanced Settings* button. As this tutorial is meant to go over the basics, we won't go into these settings. Just know that these are for very advanced users with a good handle of cascading style sheets and other internet coding technologies.

After entering your information into the fields as described above, click the blue **Save** button in the lower-left corner of the screen.



Notice how when you click **Save**, you now have the option to be taken directly to your **Broadridge** website. We recommend clicking this option so you can complete the entire set-up process in a single session.

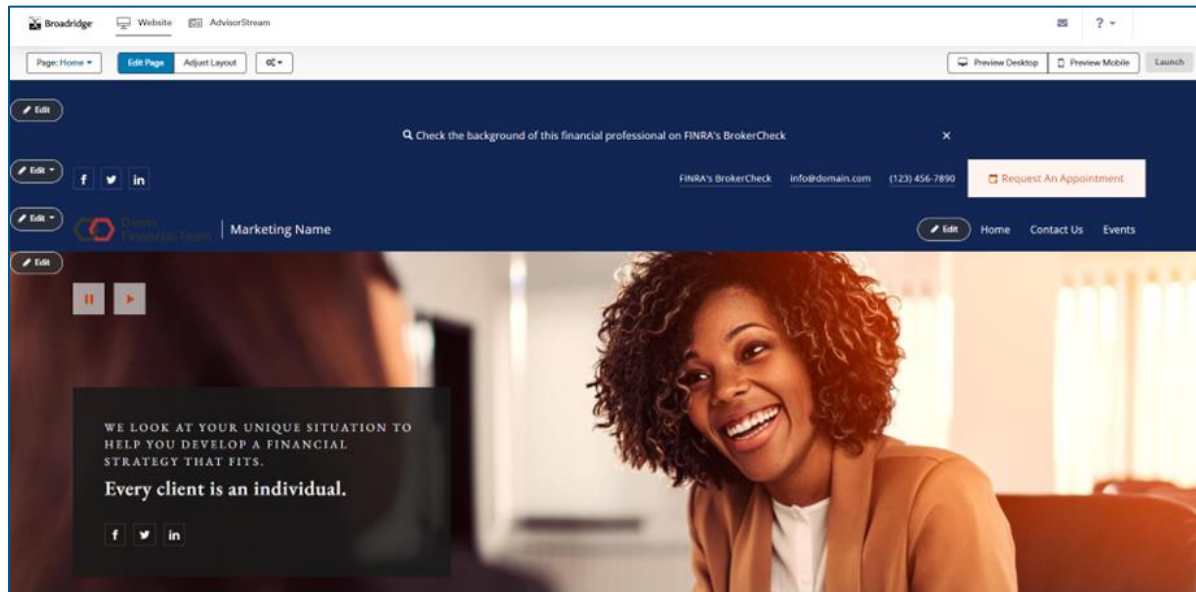
But don't panic if you choose the typical **Save my settings!** You may have already noticed, but there is now a permanent floating link at the top of your screen that will take you directly to your **Broadridge** website editor. Click on the **Website** link in the upper-left.



# Broadridge Learning: AdvisorStream + Website Manager

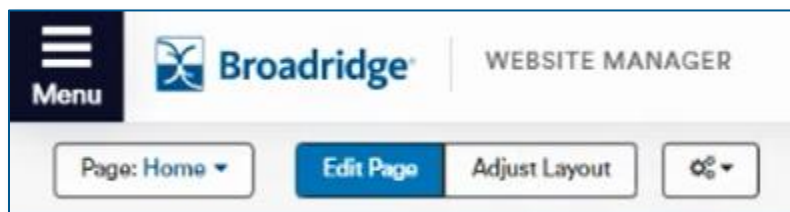
## Website Manager: Add AdvisorStream section

Now that we have set-up everything in **AdvisorStream**, we are ready to create the area where **AdvisorStream** content will appear on your website. As you can see, the navigation bar remains at the top of screen, allowing you to navigate back to **AdvisorStream** if need be.



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.

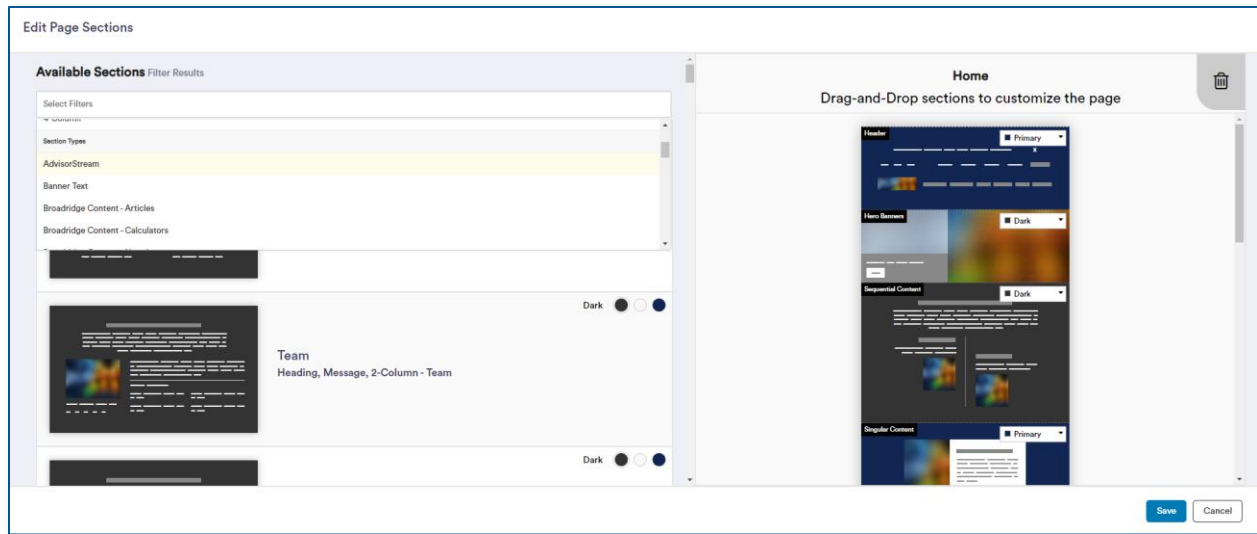
Our first step will be to add a new section to your homepage specifically for **AdvisorStream**. In the gray bar running across the top of your screen, click **Adjust Layout**.



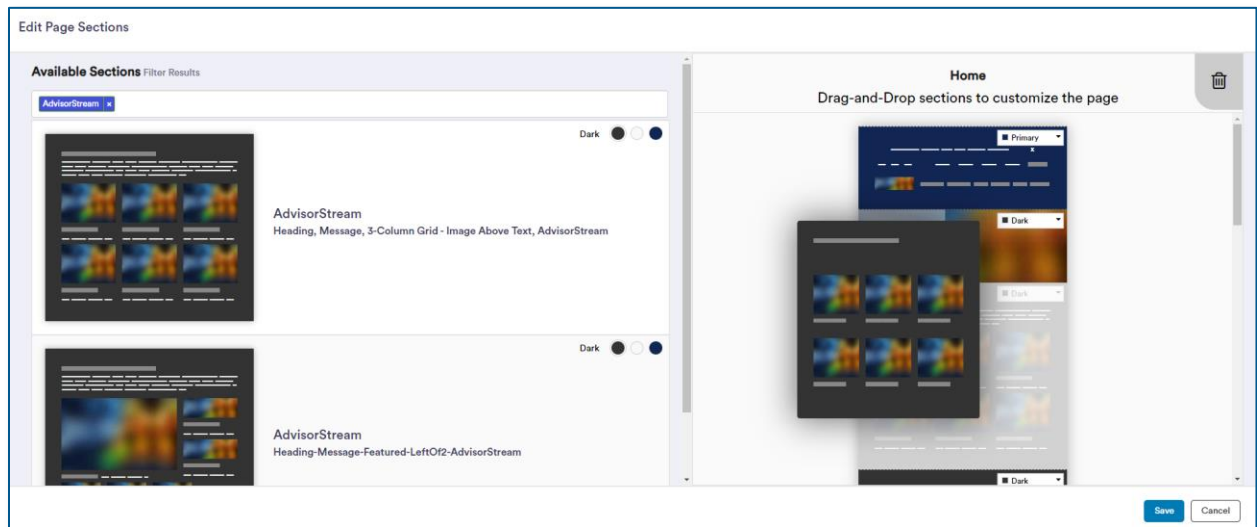
Above: **Adjust Layout** is located on the left-side of gray bar mentioned previously.

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 several unique **AdvisorStream** layouts for you to choose from, as well as multiple colors. *These layout/color choices do not affect what content will display, only how it is displayed.*



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.

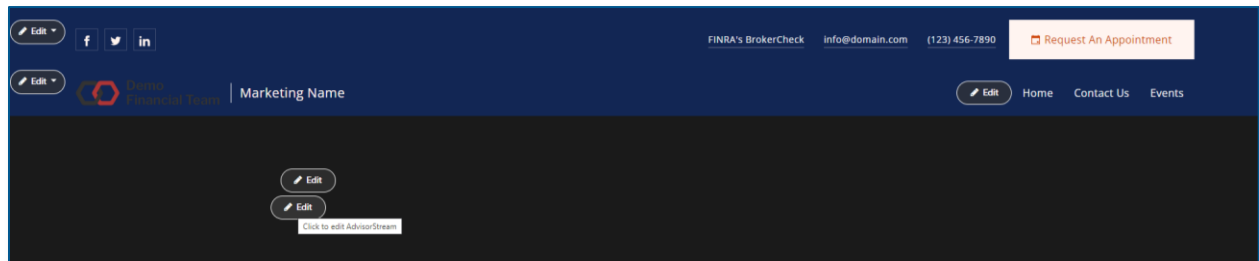
Once you have the **AdvisorStream** section added, click the blue **Save** button in the lower-right corner.

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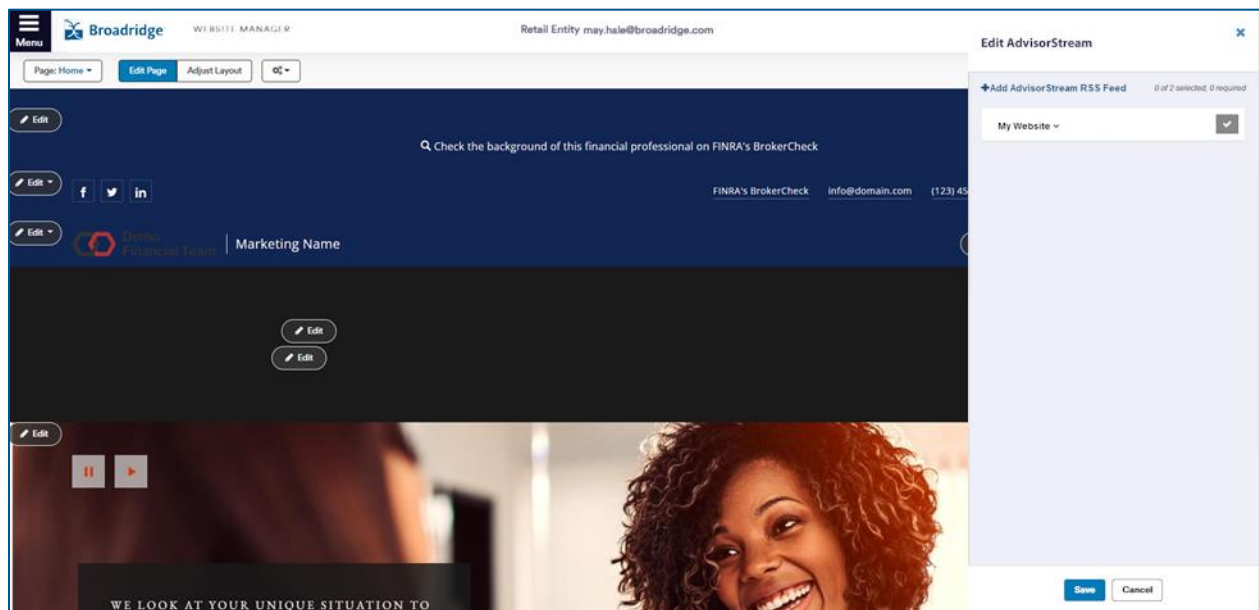
## Website Manager: Make AdvisorStream content visible

With the **AdvisorStream** section added, we now have to make the content visible. 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, hover your mouse over any **Edit** button and a helpful identification flag will pop-up.



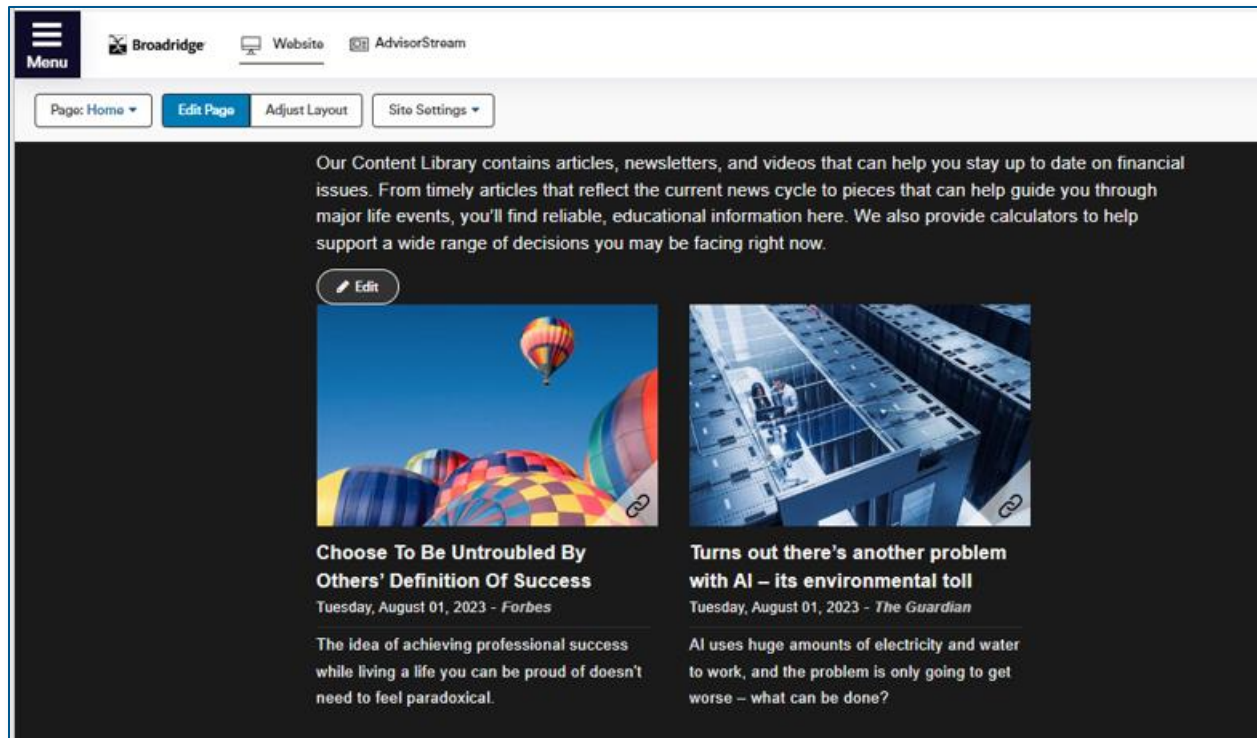
After clicking the **Edit** button, a panel will open from the right-side. As you've added your website to **AdvisorStream** earlier in the document, you should have an option in this library. *If you do not see an item in the library, click the blue **+Add AdvisorStream RSS Feed** link at the top of the library. This will take you to **AdvisorStream**. Refer back to the [AdvisorStream: Connect Broadridge website](#) section for information on how to do this.*



Click the gray checkmark to turn it green, indicating the connection is active. Then click the blue **Save** button.



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Above: *AdvisorStream* content within *Website Manager*. Your content/view may differ.

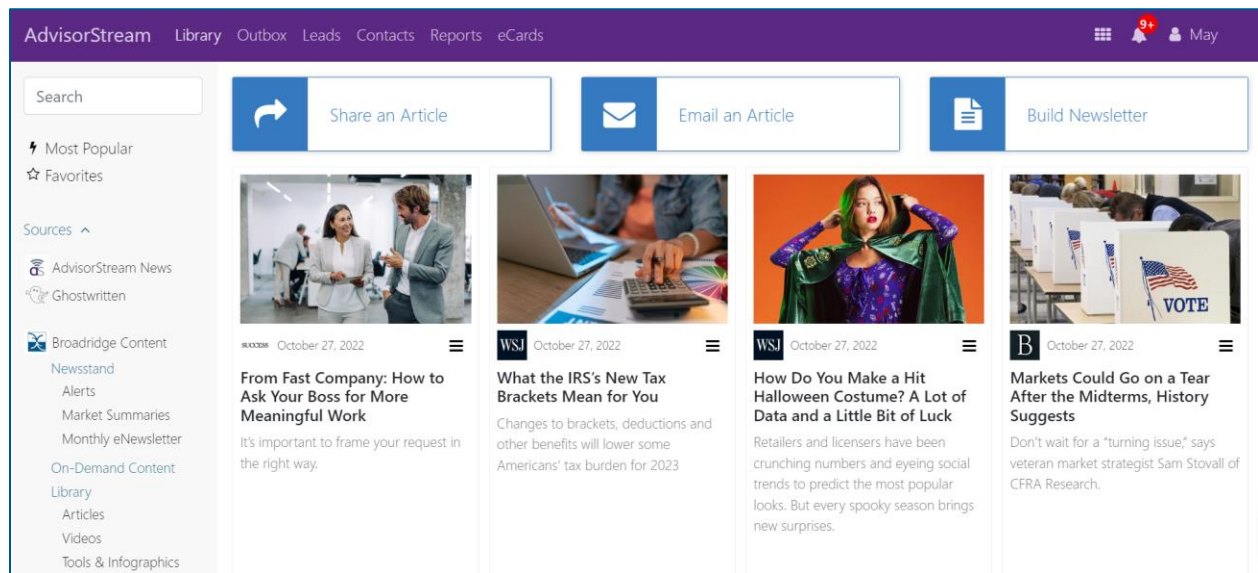
You are now ready to share content to your website. Let's go back to **AdvisorStream** and walk through this quick and simple process.

# Broadridge Learning: AdvisorStream + Website Manager

## AdvisorStream: Share content to Website Manager

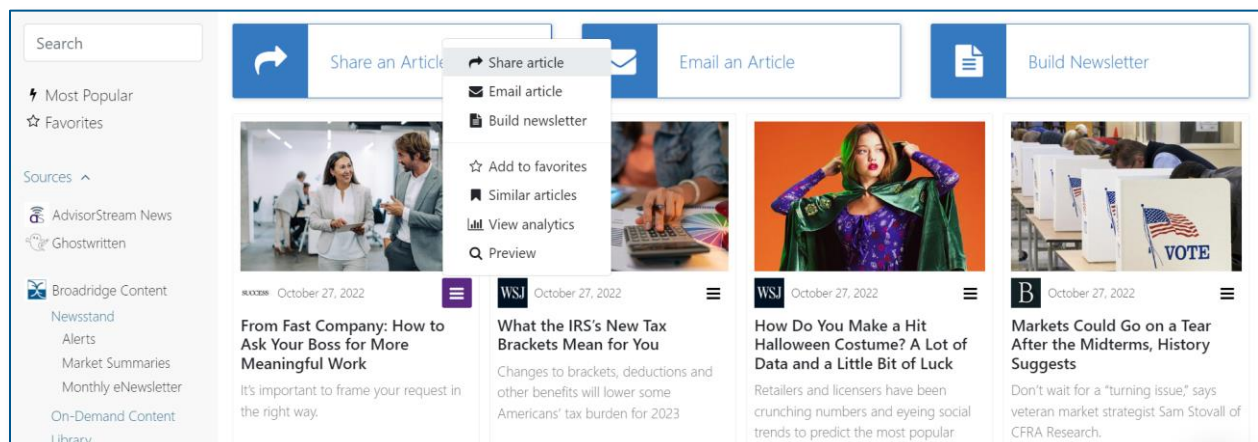
Once you have added a section for **AdvisorStream** content within **Website Manager**, you are ready to share content. Let's return to **AdvisorStream** and we'll walk through how simple it is to push content to your website now that you've linked everything with RSS code.

Back on **AdvisorStream**, navigate to the **Library**.



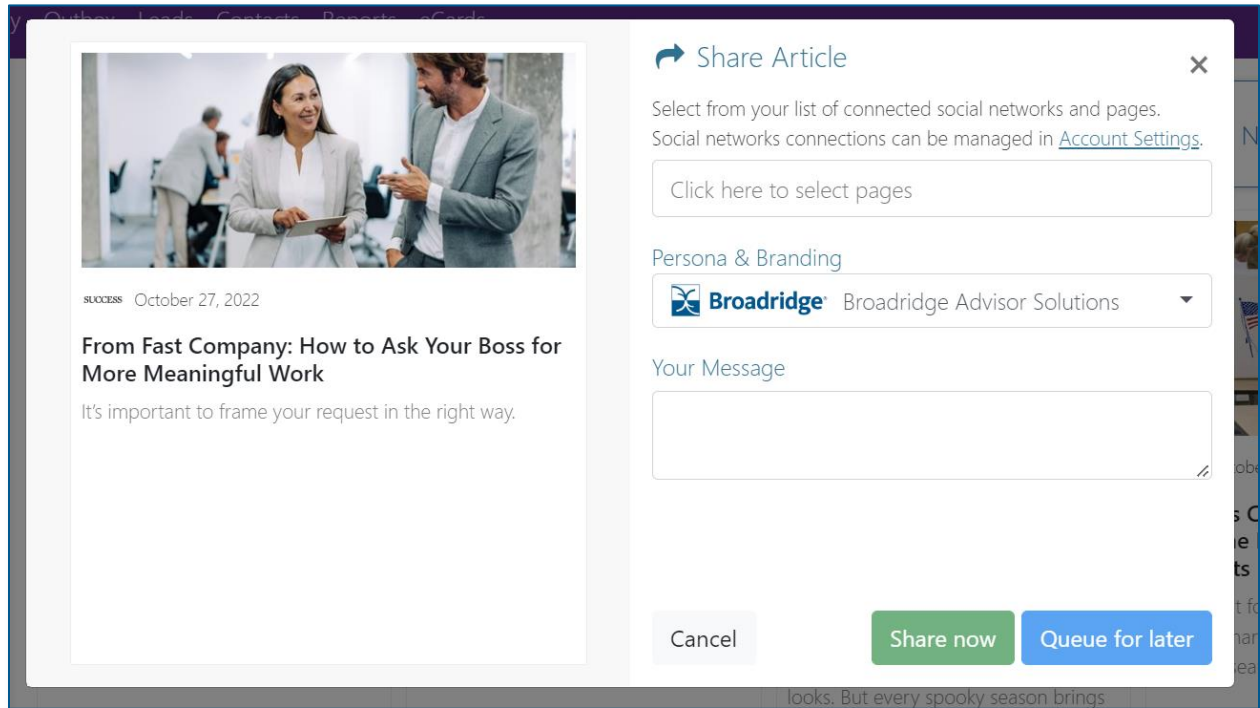
Find the article (or video or infographic, etc) you want to share. There are a variety of search and filter options on the left-side of the screen.

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.



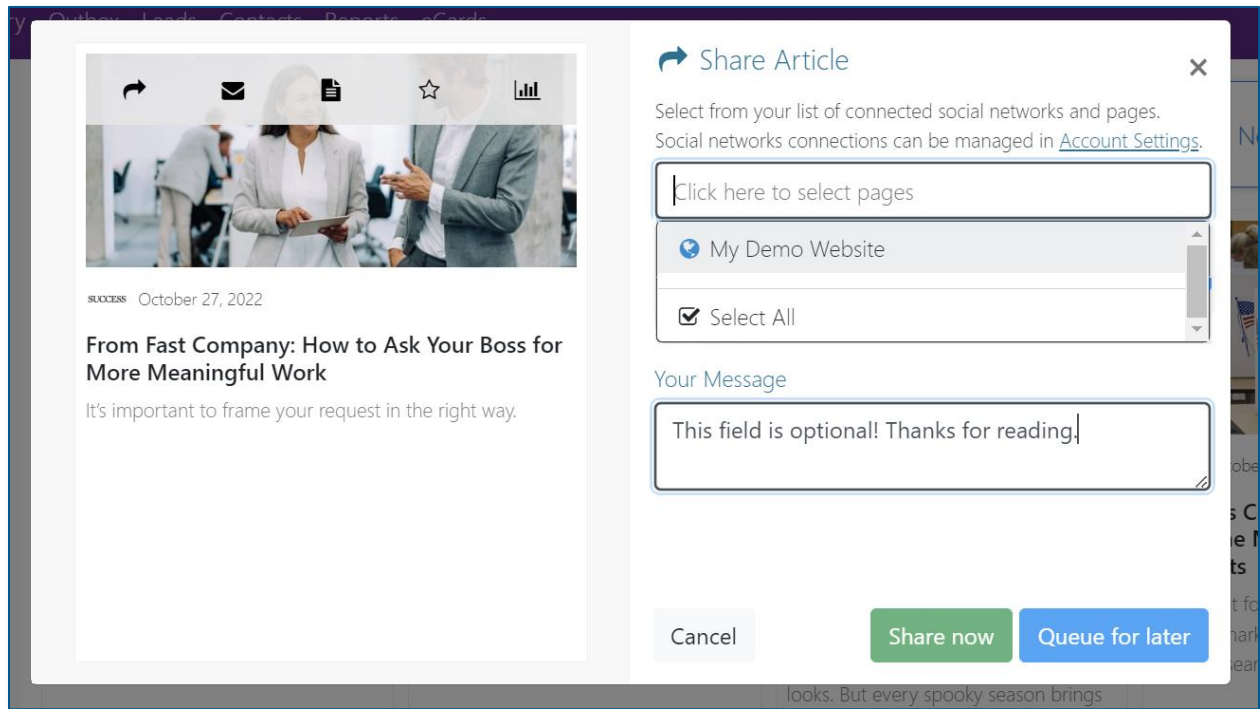
## Broadridge Learning: AdvisorStream + Website Manager

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.

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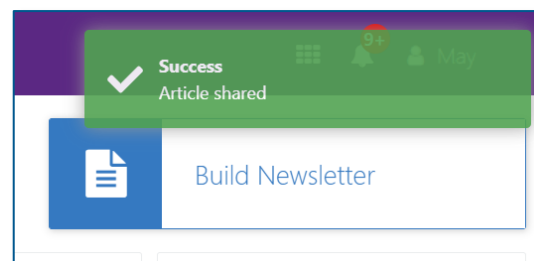


Optionally, enter a short, plain text **Message** to appear with the content on your website. Custom **Messages** may require compliance approval. *Remember, you had to select the custom message option when setting up the **AdvisorStream** side of things for this option to be available to you* (explained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

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.

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**.

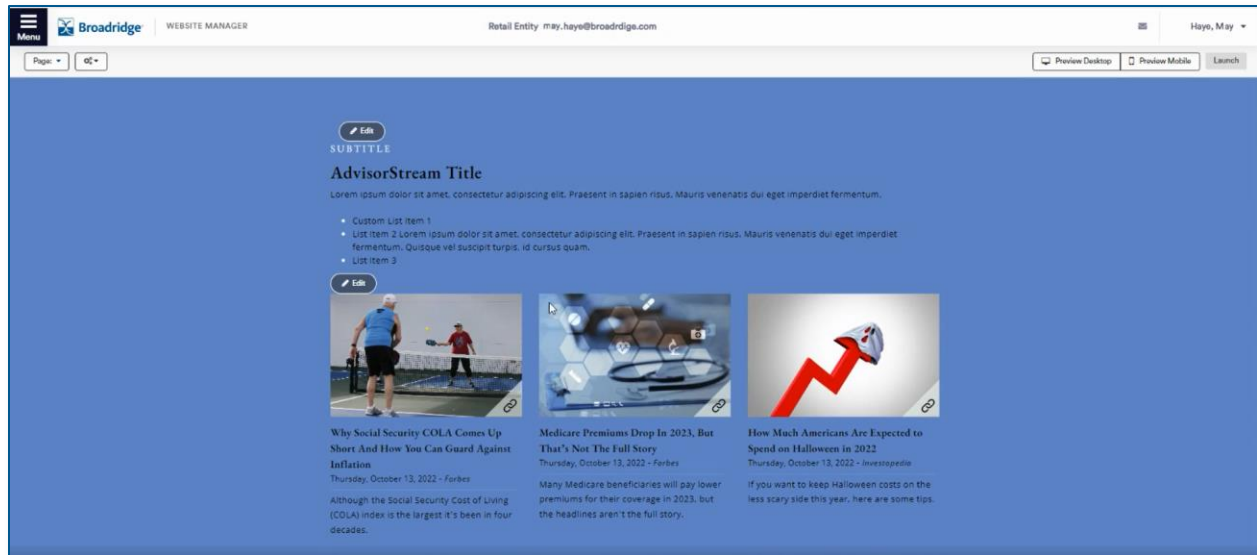


The final step in the process is to verify the content was shared to your website. To do this, we will pop back over to **Website Manager**.

# Broadridge Learning: AdvisorStream + 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.](#)