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Website User Guide:

Aquilo Insurance Solutions

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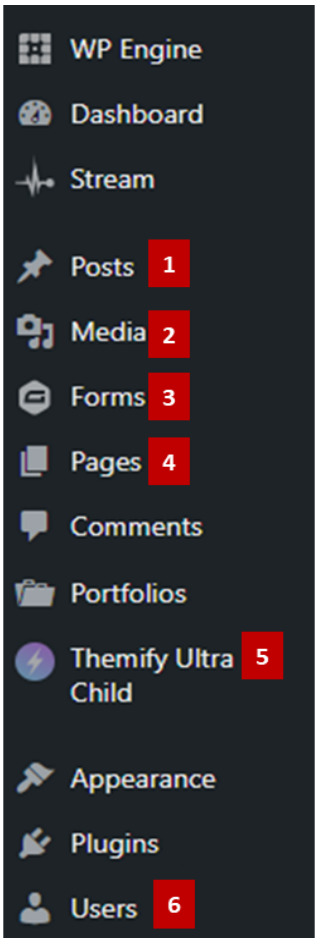

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WordPress Dashboard

To log in to your WordPress Dashboard: https://endeavorinsgroup.com/
Or, on your website home page, type this at the end: **/wp-admin** (you may want to bookmark this).

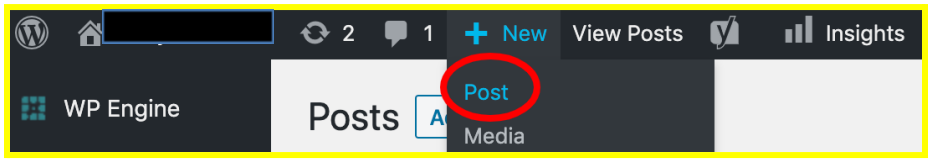
DO NOT UPDATE ANY PLUGINS, OR THE THEME.
These are handled by the host provider - updating without proper protocol could result in loss of data.

★ If you're looking to learn even more about using Wordpress, check out "Video Tutorials" at the bottom of the left-hand sidebar.

1) Posts

"All Posts" will show you the list of posts that exist on your website. Posts may be used for any type of content, such as blogs, webinar lists, case studies, etc where the site is designed to display evolving content automatically. If your site displays content of specific types already, when you create the post for the content you want, it will auto display on the page with similar content, IF you use the same category, see below.

Clicking on a post name will open it for editing, or you can click the "Add New" link to create a new post. You can also add a new post from the WP Admin header bar:



You can organize posts into Categories in order to group them by topic, and even set up different pages on your website to display a different set of posts. You can add and assign categories in the right-hand sidebar when editing a post.

For posts to display accurately on different parts of your website, ensure that new posts use the correct category in the right-hand sidebar of the post editor. Certain parts of your site might be displaying posts only if they belong to a certain category, such as News, or Life Insurance.

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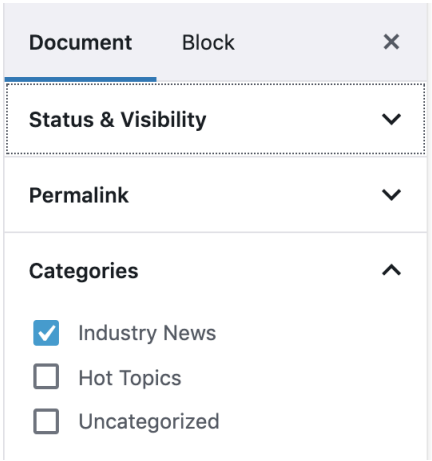


To set the image that displays with a post's summary in your list of blog posts, upload a "Featured Image," also located in this right-hand sidebar. (This is also the image that will display on that post's page.)

When you finish editing a post, remember to save your changes by clicking the blue "Publish" or "Update" button in the upper-right corner.

2) Media

The media library consists of all images and files uploaded to your website. Click on an item to open its details, including copying the URL.

If you want to change an item's file name, you have to change it before uploading to the website. Please note that the URL depends on the filename, so if you change the name of a document, you will have to update the URL wherever it is linked on your website.

Adding & Linking a PDF

1. The name of your file will determine the URL of your uploaded PDF. If desired, change the file name before uploading in order to manipulate the resulting URL.
2. Upload your PDF by clicking "Add New" at the top of the page, or dragging and dropping your file onto the page.
3. Refresh the page if the thumbnail of your new document does not automatically appear. Click on the thumbnail to bring up file details. Copy the URL on the bottom right side of the window.
4. On your page editor, select your text or button, and add a link to the URL you have copied.
5. If you would like to display a thumbnail of the pdf and link to the pdf from the thumbnail.

a. Upload both the pdf and a jpg or png thumbnail of the pdf.
b. On the page, add an image or copy an existing image to edit.
c. In the edit image screen
    i. Click the Image URL , choose the jpg or png to display and click insert.
    ii. Click the Image Link and enter the url of the pdf from the media list.
d. NOTE that the pdf will only display in the Media list selected from the left menu - not on the Add Image media pop up listing because it is not an image.

Replacing/Updating PDFs

1. Locate your current PDF in the media library. Copy down its file name for step 3.
2. Delete your old PDF.
3. Ensure the file name of your new PDF is the same as the old one copied in step 1. Then, upload your new PDF.
4. Make sure that your PDF has updated correctly on your website by viewing a page where that PDF is linked. You may need to refresh the page - not just your website page, but the PDF itself if it opens in your browser window.

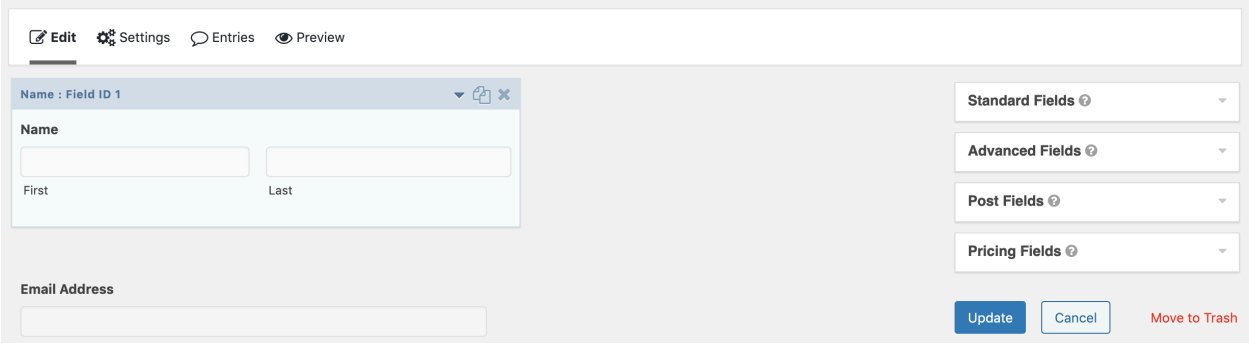
Adding an Image

1. Upload your image just like you would upload a PDF.
2. This image will now be available to you when editing or creating a page or post.

3) Forms

Making Changes to a Form

On the “All Forms” page, click on a form name to open the “Edit” screen. Your current form will display on the left-hand side, and new fields you can add are listed on the right:



Adding Fields:

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- In the right-hand list, click once on a field type to add it to the bottom of your form.
    - STANDARD fields include single text (where the answer should be one word or a short statement), checkboxes, etc.
    - ADVANCED fields include name, address, phone number, etc.

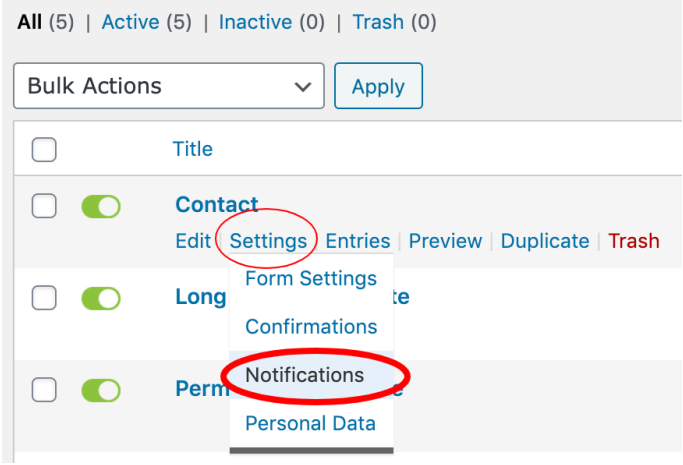
Rearranging Fields:

- Hover over a field to see the blue box around it, with a darker blue bar at the top.
    - Click and drag the dark blue bar to rearrange this field within the form.
    - Click the down arrow in the dark blue bar to edit field details.

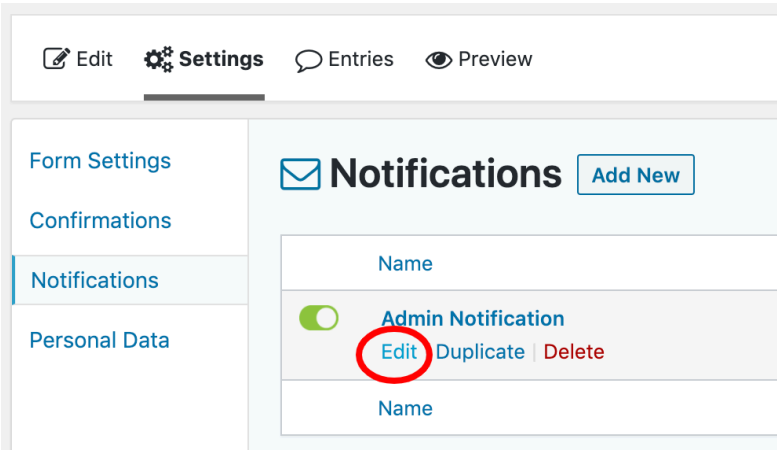
When you are finished, remember to save your changes by clicking the blue "Update" button on the right-hand side, under the new fields to add.

Editing Email Notifications

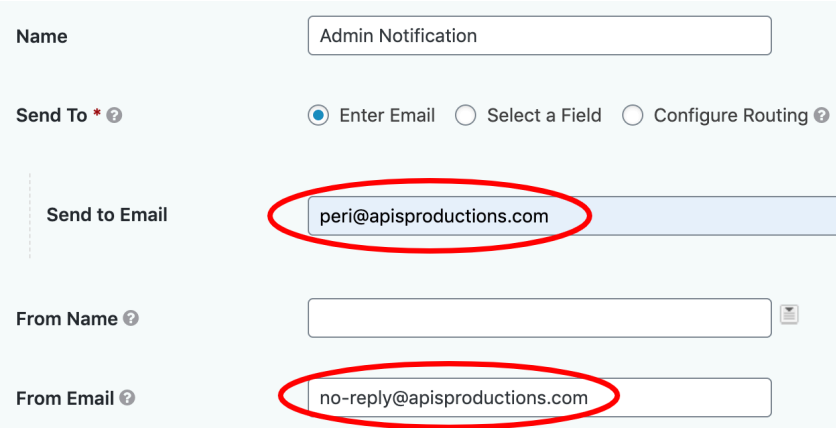
To change the email address that receives notifications of new form submissions, first, on the "All Forms" page, hover over a form name, then hover over "Settings," then click the "Notifications" link:



On the resulting page, click "Edit" under "Admin Notification:"



The “To Email” should be the email address that will be receiving notifications. The “From Email” is the address that the notification will be coming from. (We usually suggest you use “no-reply@YOUR-URL.com.”)



When finished, remember to scroll down to the bottom of the page and click the blue “Update Notification” button to save your changes.

Adding a New Form

Click “Add New” either from the top of the All Forms page, or on the sidebar flyout.

1. Give the new form a title. Description is optional. Then, click “Create Form.”
    - Instructions will display on the screen, but as soon as you add your first field, they will disappear.

2. Select and edit your fields.
3. When you are finished, click the blue “Update” button on the right-hand side to save your changes.

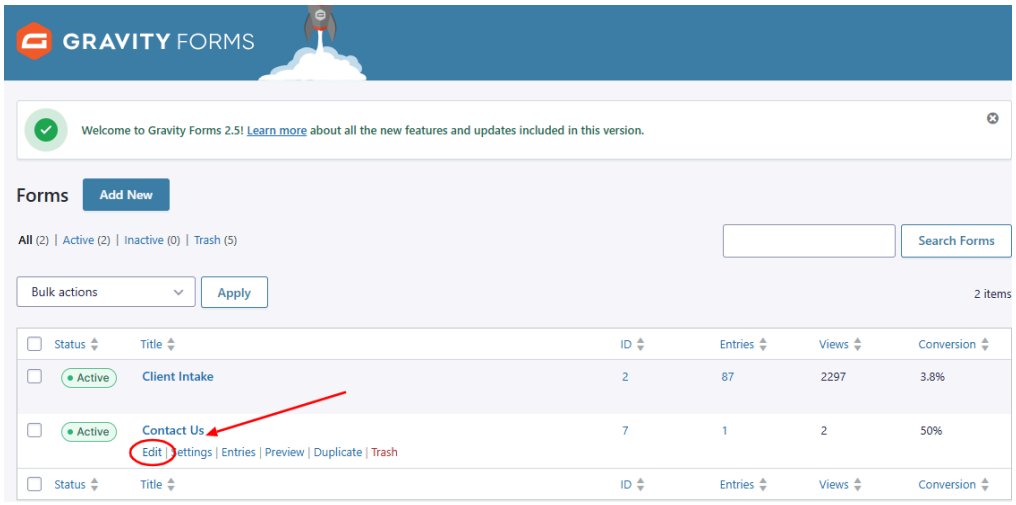
Once your form has been built, you must indicate who will be emailed when a user submits to this form.

1. With your form open, hover over “Settings” and click on “Notifications.”
    - Or, on the “All Forms” page, hover over the name of your new form, hover over “Settings,” and click on “Notifications.”
2. Hover over “Admin Notification” and click “Edit.”
3. In the “Send Email” field, input the email address of the person or people (separated by commas) who will be notified upon form submission.
4. Click “Update Notification” at the bottom to save your changes.

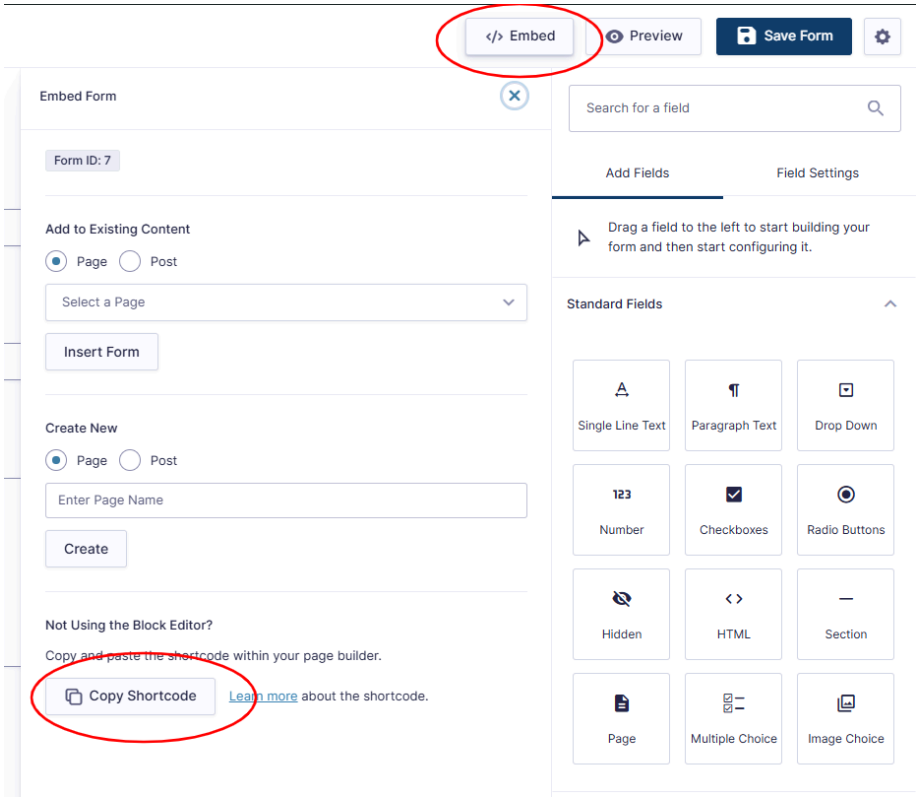
Adding forms to a Page

To add a Gravity form to a page:

1. From the Gravity Forms Dashboard, Click to Edit the desired form.



2. Click the </> Embed button in the top right corner of the screen.
3. Click the "Copy Shortcode" button to copy the necessary shortcode for this form.



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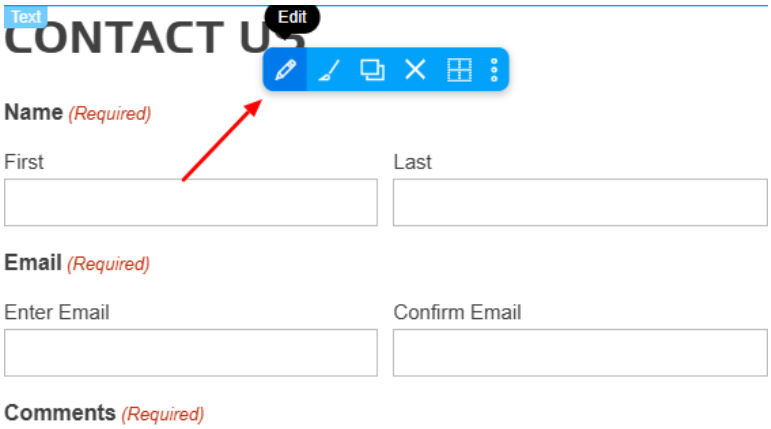
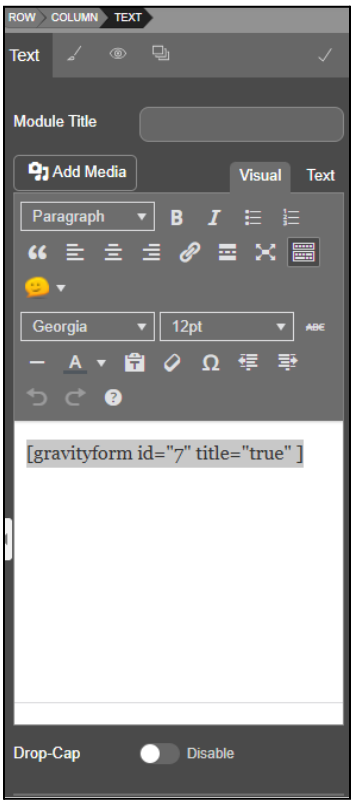
4. Create or determine the page where the form will be added.
5. While on the page, click "Turn on Builder" in the black bar at the top of the screen.
6. In the location where the form will be placed, add a Text block.
7. Hover over the new Text Block and click to the pencil icon to edit.



8. Paste the Gravity Form Shortcode into the Visual Editor of the Text Block

Note: The gravity form will automatically display in the new Text Block.

To remove the Form title, update the shortcode from title="true" to title="false".



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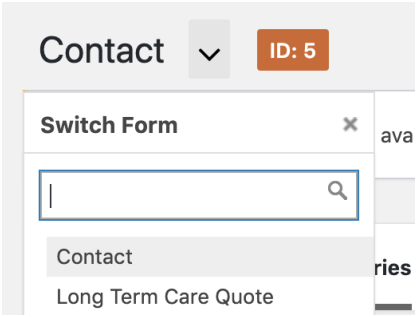
Accessing Form Submissions

On the “All Forms” page, hover over the name of your form and click “Entries.” Or, with your form open, click on “Entries.”

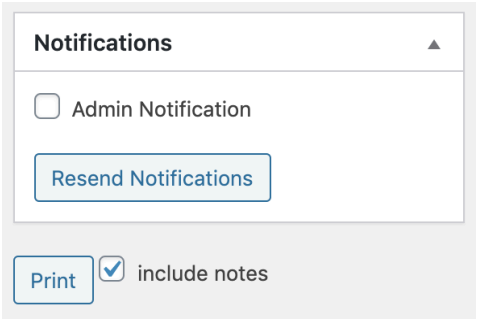
★ If you cannot access the “All Forms” page (i.e. if you are a user without editor permissions who manages the form entries), with the “Entries” page active for a given form, click on the down arrow next to the form name at the top of the page to switch between forms:



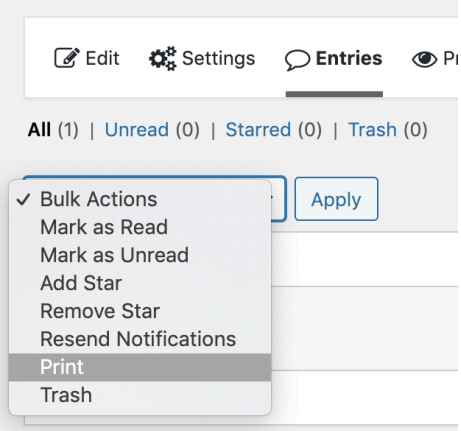
Exporting Form Submissions

(1) As a PDF:

When viewing a particular form entry, on the bottom of the right-hand side, you will see a “Print” button which allows you to save the form submission as a PDF on your local computer:

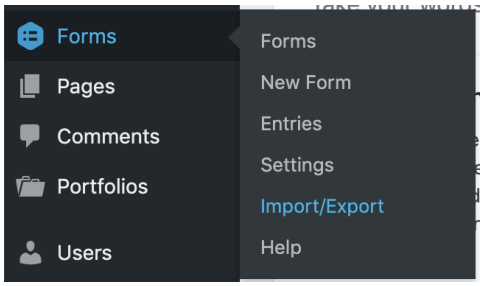


You can also print multiple entries into a single PDF. In a form’s list of all entries, check off the entries you want to export, then select “Print” in the “Bulk Actions” dropdown, and then click “Apply:”



(2) As a CSV:

On the left-hand sidebar, click on “Import/Export” under “Forms” (or on the flyout that appears on hover):



Under “Export Entries,” select your form on the drop-down menu, then check off the fields you want to export to a CSV (“comma separated values” - a text file that can be read as a spreadsheet). Scroll down, add advanced criteria if desired, then click the blue “Download Export File” button.

4) Pages

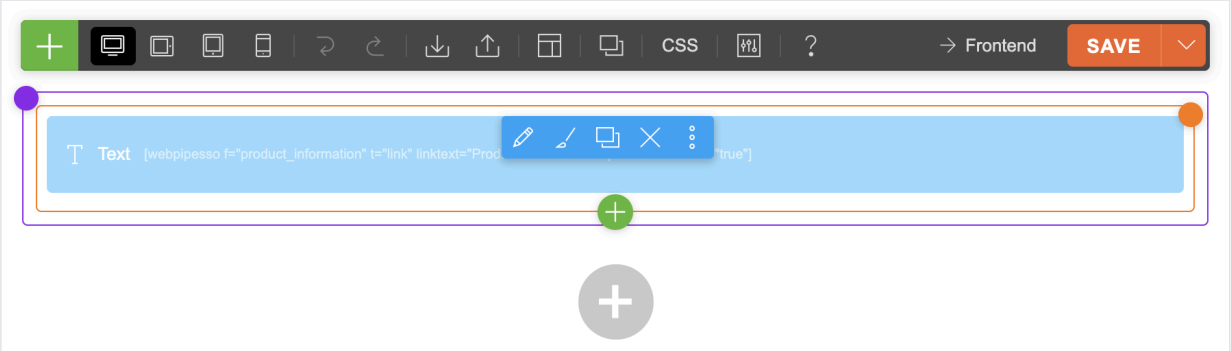
On the “All Pages” page, click on a page title to edit that page.

IMPORTANT!! DO NOT EDIT SSO CODES OR REPLACE SSO CODES WITH LINKS OR TEXT. Shortcodes look like this [webpipesso f="product_information" t="link" linktext="Product Search"] or [sso-vive].

Backend Editor

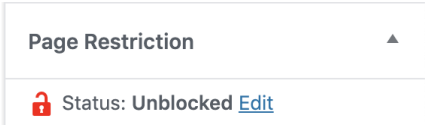
Access the backend editor by clicking on a page name in the “All Pages” section of your Wordpress dashboard, or by clicking on “Edit Page” in the admin header while viewing your website.

Here you will see your page broken down into blocks. The easiest way to edit your site will be to click on the "-> Frontend" button, so that you can easily identify what block corresponds to what content.



(Please see the Frontend Editor section to read about how these colored outlines, dots, and boxes work.)

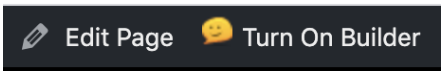
To restrict access to a page to only users who are logged in, or conversely, to unsecure a page to the general public, toggle the "Page Restriction Status" on bottom of the right-hand menu. (Blocked = user must be logged in to view.)



If you make edits on the backend, when you are finished, be sure to click the orange "SAVE" button in the top right corner of the section, and then the blue "UPDATE" button in the top right corner of the screen.

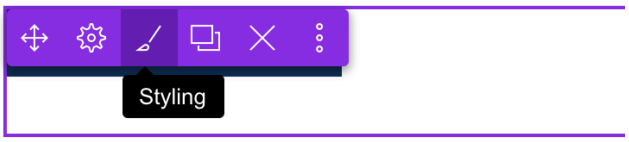
Frontend Editor

Access the frontend editor by clicking the "-> Frontend" button (next to the orange "SAVE" button) at the top of the backend editor, or by clicking on "Turn On Builder" in the admin header while viewing your website:

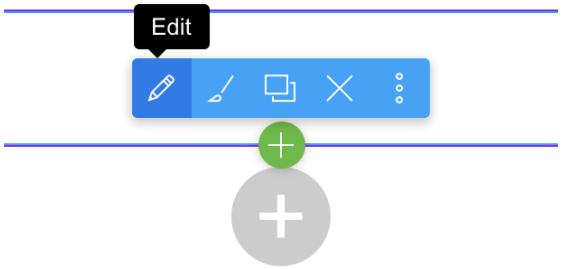


(Clicking on "Edit Page" will take you to the backend editor.)

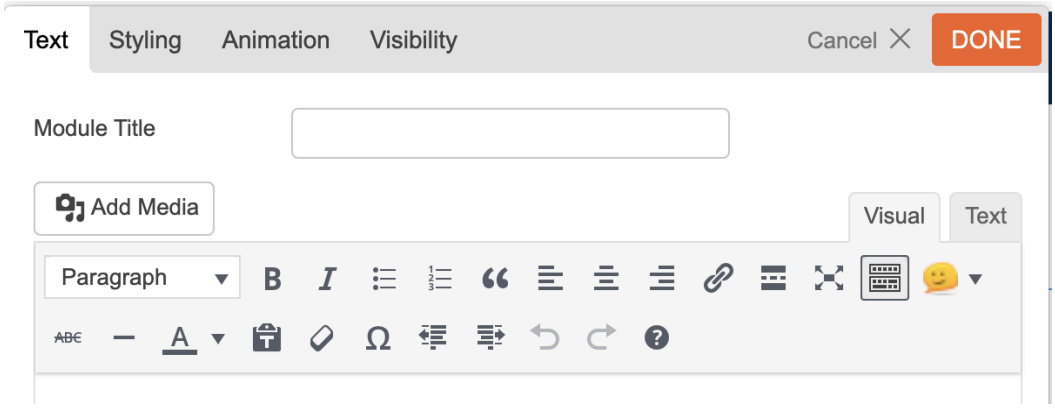
With the builder turned on, when you hover over elements of your page, you will see colored outlines and dots appear. Hover over a dot, and a box appears. The purple and orange boxes correspond to sections where you can edit styling:



The blue box indicates an actual piece of content to edit:



If you click on “Edit,” you have access to panels to edit content, styling, and more:

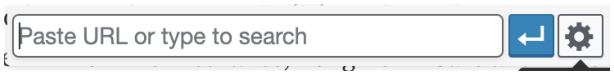


When you are finished, make sure that you click the orange “SAVE” button in the top right corner of the page to save your changes.

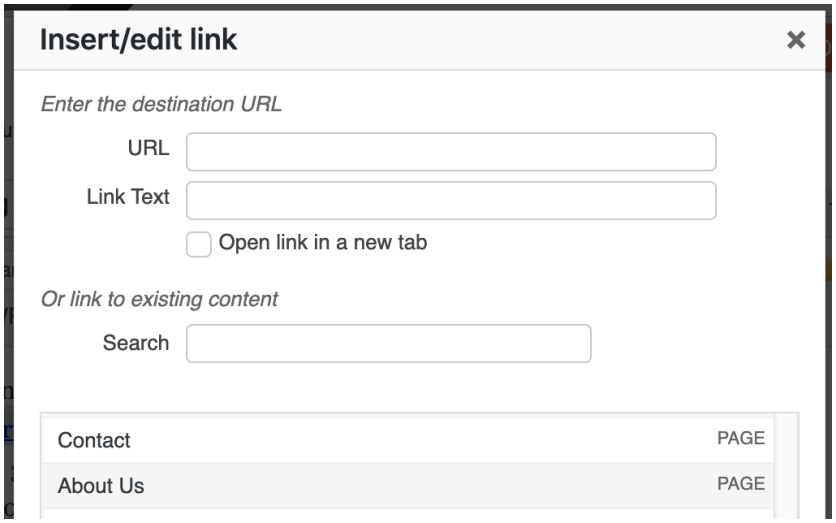
★ **When editing styling, please note:** If you want to edit the styling of large portions of the site (including fonts and colors), please submit a support ticket using the instructions at the end of this document, instead of editing the styling of many individual blocks. We can edit the underlying style sheet and save you a lot of time and effort!

Creating a Link

1. Within the text editor, select your text or image and click on the link icon. A small bar will appear over your content:



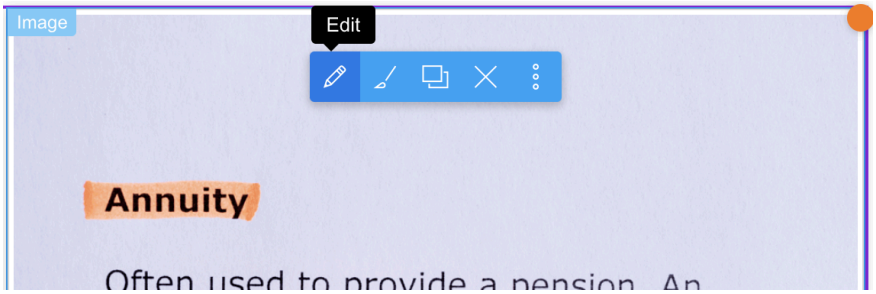
2. Click on the gear to access a full menu:



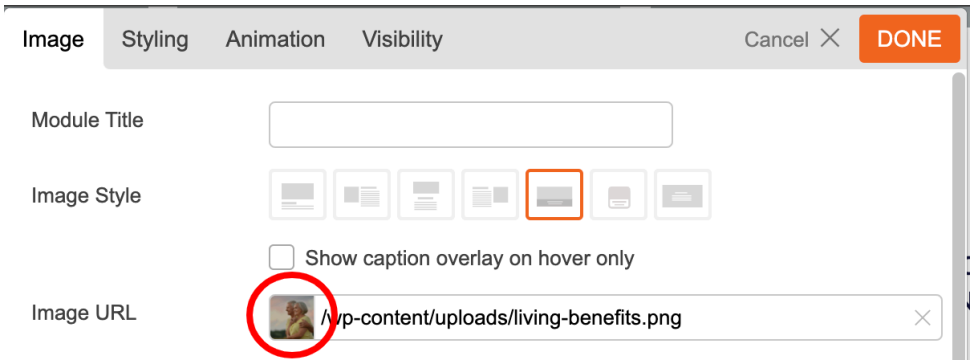
3. "Link text" will be pre-populated with the text you highlighted in the editor. Enter the URL for your link (this can be the URL of a PDF, too), or select a page on your site from the list at the bottom.
4. Click the blue "Add Link" button at the bottom of the window when you're finished. Remember to save your changes on your page or post.

Changing an Image

In the Builder, go to Edit an Image block:

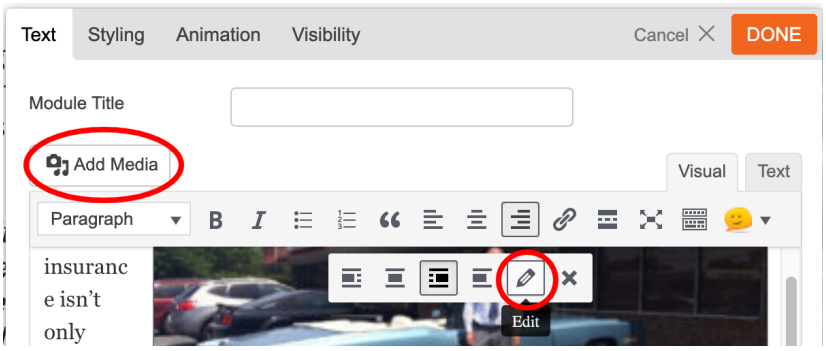


In the edit window, click on the icon next to your image's URL:



This will open your Media Library, where you can select an image you have previously uploaded, or you can upload a new image.

Note that some images on your site may be embedded in Text modules instead. Images can be added from your media library with the “Add Media” button, and can be edited (size, caption, alignment) with the “Edit” button on the image itself:



5) Themify Ultra Child – Layout Parts

Your site uses Layout Parts. This is a special element that can be maintained in one place and then used anywhere on the site.

To edit a Layout Part

1. Go to the Themify Ultra Child/Layout Parts
2. Hover over the part you would like to edit and click Edit
3. Edit the section as you would any page using the Pages section for more details

4. Update the layout part when done
5. Anywhere the part is used on the site will be updated

To add a Layout Part to A New Page

1. Go to the layout parts, and copy the shortcode for the layout part, i.e. [themify_layout_part id="3333"]
2. Go to the page where you would like to add the part
3. Add a text element
4. Add the shortcode for the layout part into the text element
5. Update the page

6) User Management

Adding a User

1. Click on “Add New” in the flyout under “Users” in the left-hand sidebar, or click on the “Add New” button at the top of the “All Users” page.
2. Once the profile information is complete, scroll down to the bottom and click the blue “Update User” button to save your changes.
3. If your site has user roles, set the new user’s role using the **Assign Roles to Users** instructions in this document.

Approving a Newly Registered User When Registration is Moderated

Method 1:
To activate users without using the “new user” notification email, go to the backend of the website, to the Users menu item.

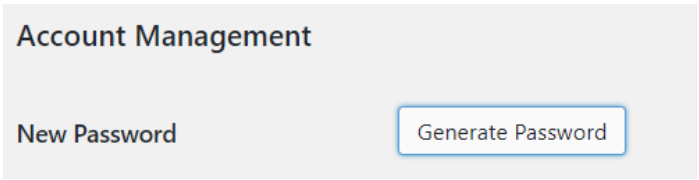
1. Log into the website
2. If not already on the wordpress backend, get there by clicking the website name in the VERY upper left corner of the website page.
3. Click Users
4. In the “All Users” list, click “Pending Activation” in the top list of all user types
5. Scroll to or search for the new user
6. Hover on the username and click Activate, the user will receive and email that they can log in
7. If your site has user roles, set the new user’s role using the **Assign Roles to Users** instructions in this document.

Method 2:
If you receive an email notifying you that a new user wants to register, click the link in the email. If you are logged into the website, it will take you into the “edit user” for that user. If you are not logged in, you will have to log in first.

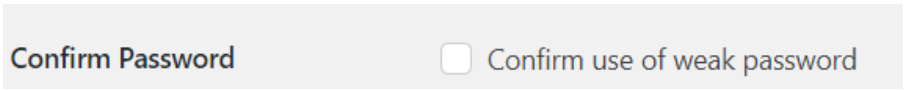
Once you get into the “edit user”, scroll down to the bottom of the user record information and check the little box that says “activate this user”. Then scroll to the bottom and click “update user”. The user will receive an email notifying them that they are activated, and they can then log in. Set roles and other settings as needed.

Resetting a User’s Password

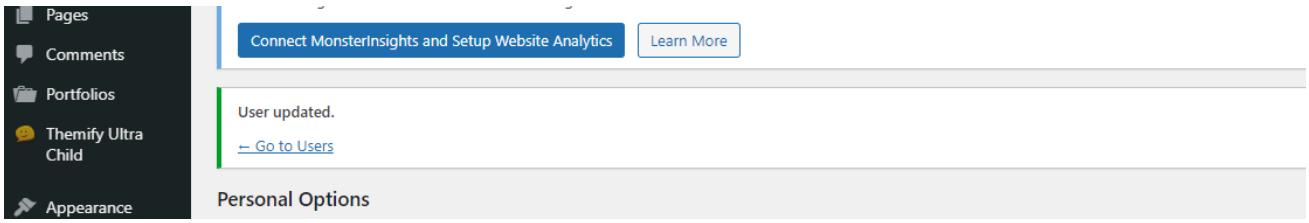
1. Access the user’s profile by clicking on their name in the “All Users” list.
2. In the user’s profile, locate the “Generate Password” button:



3. Once you click the button, you can manually type in a new password. You may need to check off the “Confirm Weak Password” box if the password is not strong:

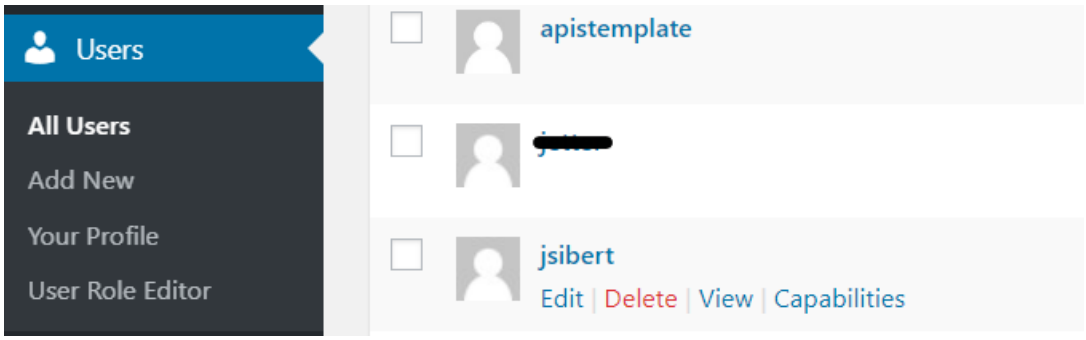


4. When done, scroll to the bottom of the page and click the “Update User” button to save your changes.
5. Make sure you see the wordpress acknowledgement “User updated” that starts with a green vertical bar in the image below.



Deleting Users

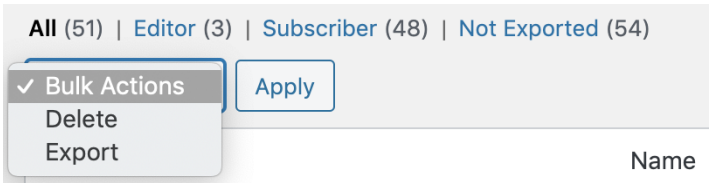
In the “All Users” list, hover over a name to reveal the red “Delete” link:



Be careful - this cannot be undone!

Exporting Users

On the “All Users” page, check off the users you wish to export, then select “Export” under the “Bulk Actions” dropdown menu, and click “Apply”:



Or, at the bottom of the list, you can click the “Export All Users” button.

Troubleshooting email issues

Wordpress sends emails to users for a variety of reasons. New user registrations, password resets, etc. Sometimes users have trouble receiving these emails. If you have this problem, try these options:

1. Have the user check their spam or junk folder first
2. Send the user a password reset email
    a. Go to the Users menu item
    b. Hover over the user and click “Send a password reset” which will send a reset email
3. To reset the user’s password manually
    a. Go to the Users menu item
    b. Use the instruction “Resetting a User’s Password” above to create a new password
    c. Note the username and copy the password before updating the user.

d. Send the user an email from your own email that includes the URL of the site, the username, and the new password that you created.
e. You can also log out of the site and log in with the new user credentials to test.

Switching Users – not available on all sites

On the "All Users" page, hover over a name to reveal the "Switch To" link:



You will now be viewing the Dashboard as that user, with their permission levels. You can view the site by clicking on your site name in the top-left corner of the screen.

To return to your own account, there will be a link in the bottom-left corner of any page.

★ Remember to logout of any tools you opened when using this feature, to ensure you are completely logged out of that account.

7) Single Sign On (SSO)

SSO allows users to connect to, and automatically log into, your external tools, such is iPipeline, without the need to enter login information. SSO communicates with the external tools to send authorization information using the user's website login.

SSO is managed by custom plug-ins and "shortcodes". IMPORTANT: DO NOT CHANGE OR REPLACE THE SHORTCODES WITH LINKS OR OTHER CONNECTIONS TO THE EXTERNAL TOOLS AS THIS COULD RESULT IN UNEXPECTED CONNECTIONS TO USER ACCOUNTS AND CLIENT INFORMATION. Shortcodes look like this [webpipesso f="product_information" t="link" linktext="Product Search"] or [sso-vive].

DATAVIEW – Onboarding new website users into DATAVIEW

Each user on the site will have a dataview account and for each, you must set the dataview account with a special code, called the PipePassID, so the site SSO can find the corresponding dataview account. To do this, follow these instructions:

Your Pipepass ID format is *put pipepassid format here*

1. Obtain their website username (note - remove any special characters, for example the @ and the . in the email address)
2. Add a prefix (4 digit Prefix = GAID)
3. Add a suffix (Suffix = CompanyCodeGAID)
4. For example: Website username is **rrandy** so PipePassID will be 1234**rrandy**ABC1234, where 1234 is the GAID, rrandy is the username, and ABC1234 is the CompanyCodeGAID.
5. Enter that combined code into the PipePassID field in Agency Integrator
6. NOTE: You will need to do this for every new website user as you onboard them.

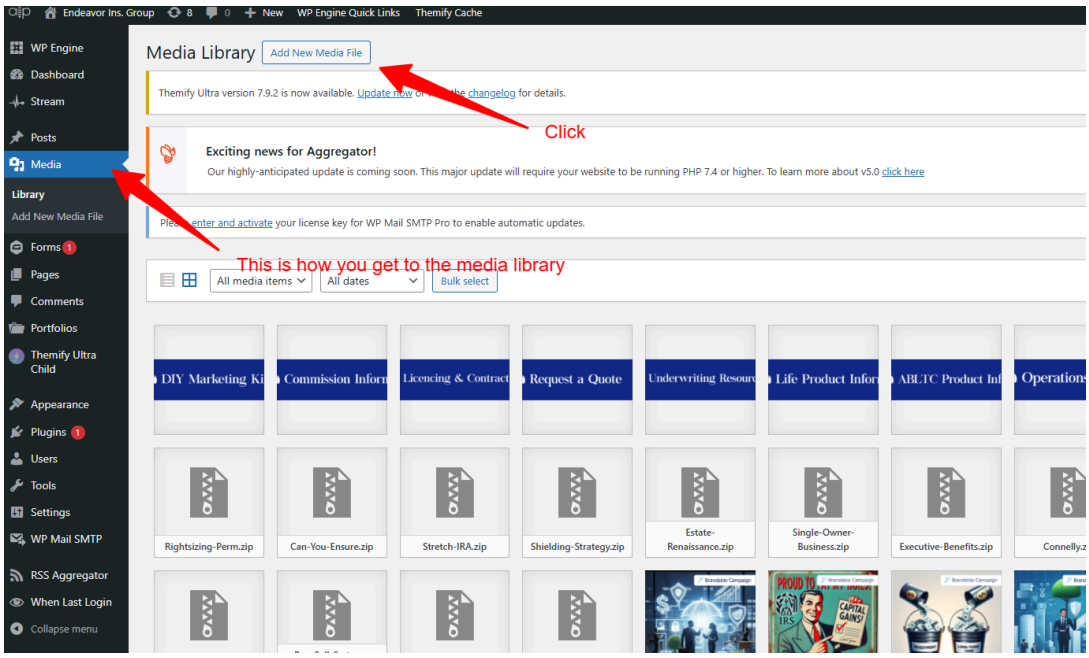
Header & Footer

Editing these sections will require submitting a support ticket to our support system, instructions are at the end of this document.

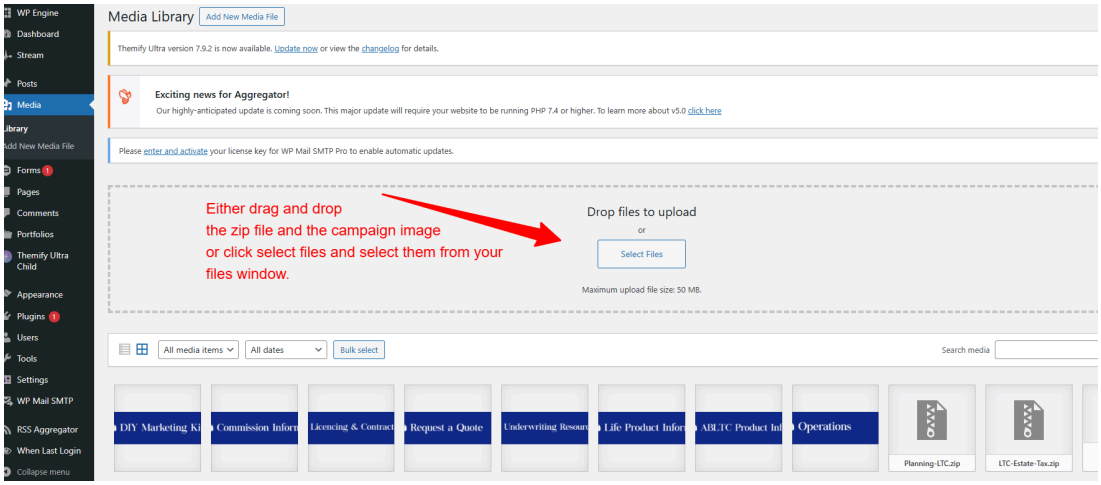
8) How to add Campaigns from AIN to Aquilo

1. Go to https://www.ainessentials.com/diy-brandable-campaigns/
2. Select a campaign
3. Choose which version you want and download the campaign image
4. Copy the text of the title and summary (paste it somewhere for you to be able to copy and paste it again later)
5. Then also download the Complete Assets (this will be a zip file. Their zipfiles may have names that are too long. When you download it, I advise shortening the name as much as possible)
6. Now go to the backend of your website (i.e. login)

7. On the left hand side, click Media to open the media library. Click Add New Media File

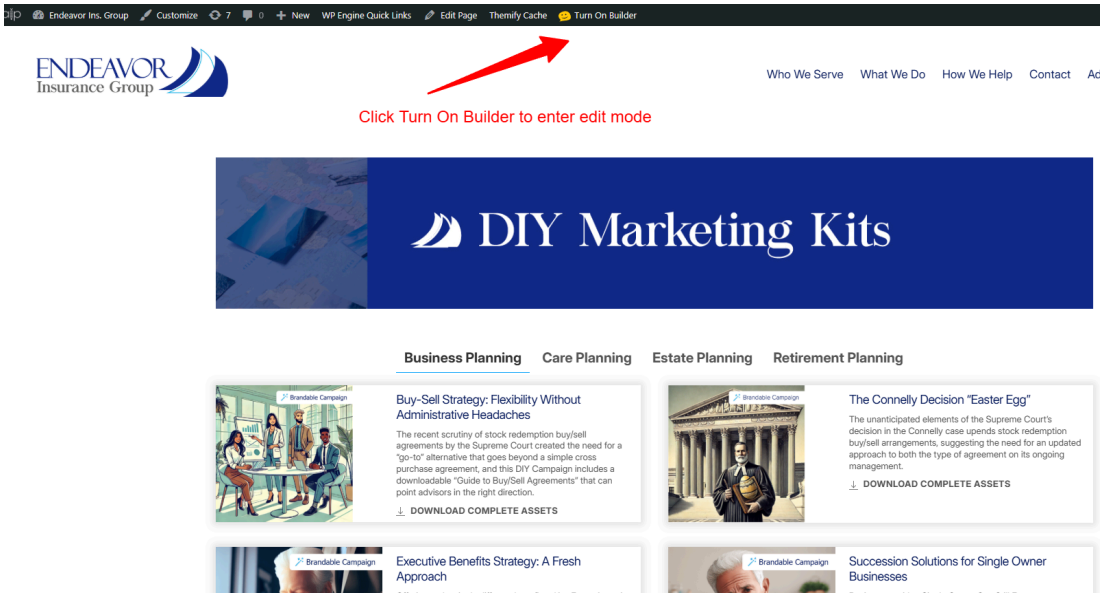


8. Drag and drop the Campaign Image and the Complete Assets zip folder to upload into the Media Library

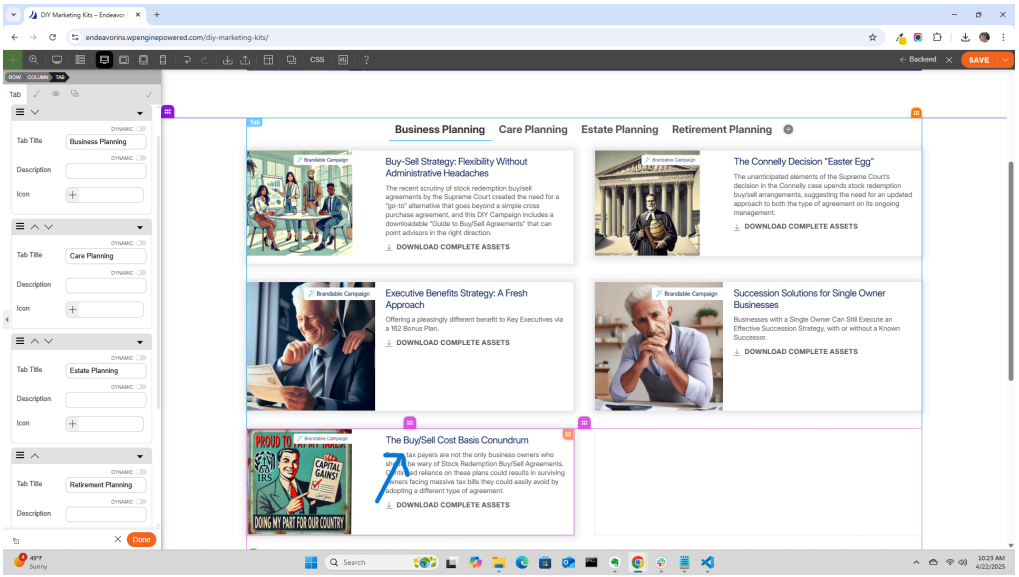


9. Open a new tab in your browser. Go to this URL: https://endeavorins.wpenginepowered.com/diy-marketing-kits/ (obviously, when you have your official url, it will be offiicalURL/diy-marketing-kits)

10. Click Turn On Builder at the top of the screen

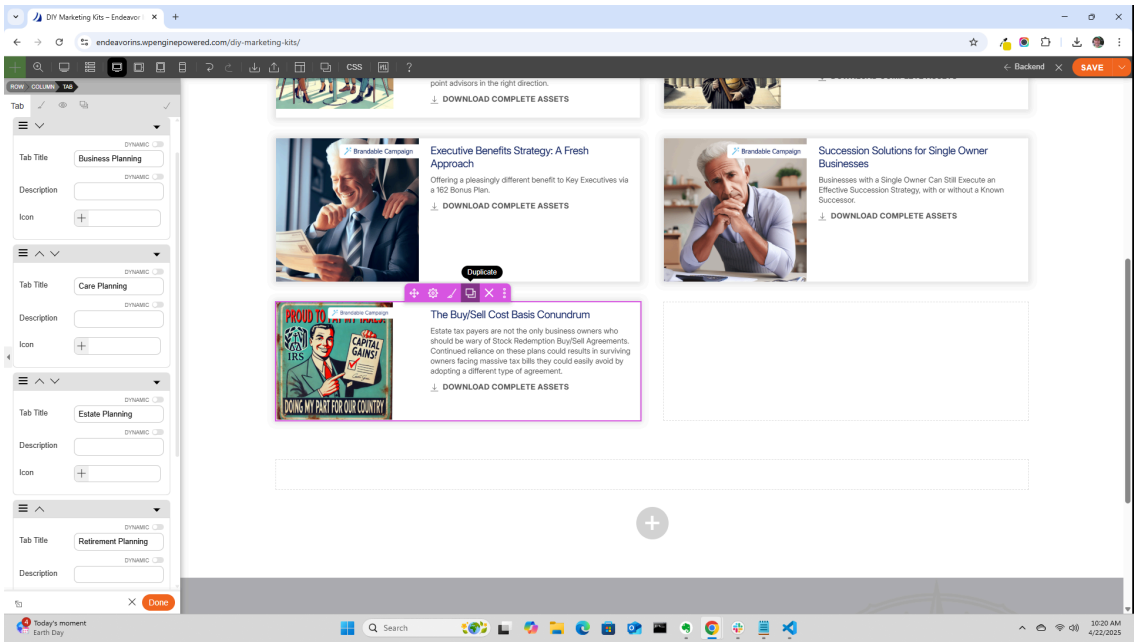


11. Choose your category (business planning etc)
    1. You'll want to duplicate an existing campaign (look for the purple thing with the dots in Step 11 image)

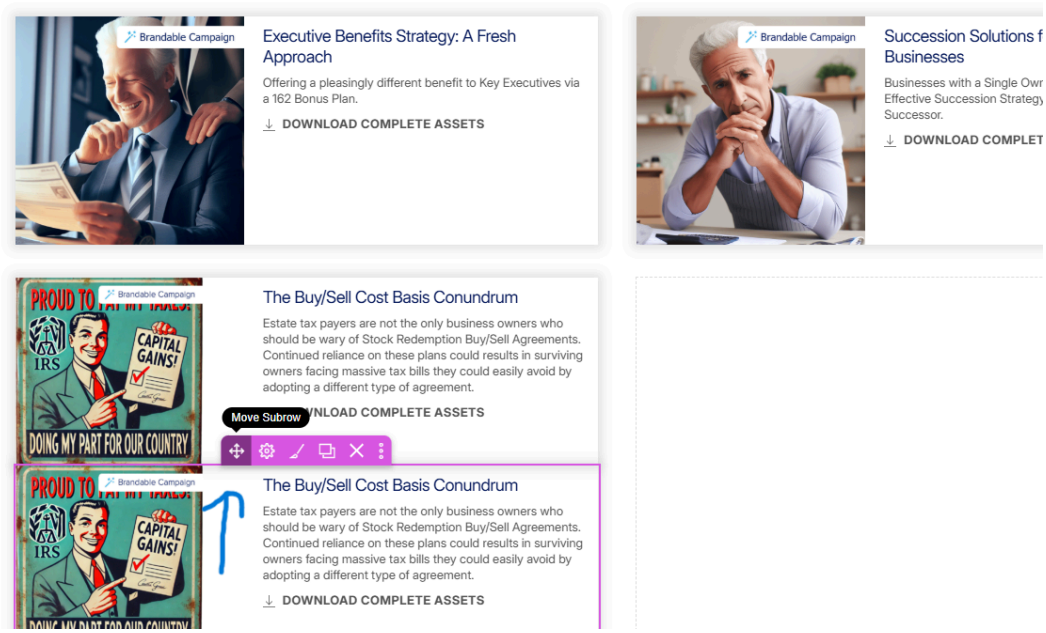


Web: www.apisproductions.com
Phone: 410.267.6777

12. Select Duplicate (see Step 12 image) once you do this, the existing campaign will duplicate (usually below)



13. On the copied campaign, click and hold on Move Subrow (Step 13 image)



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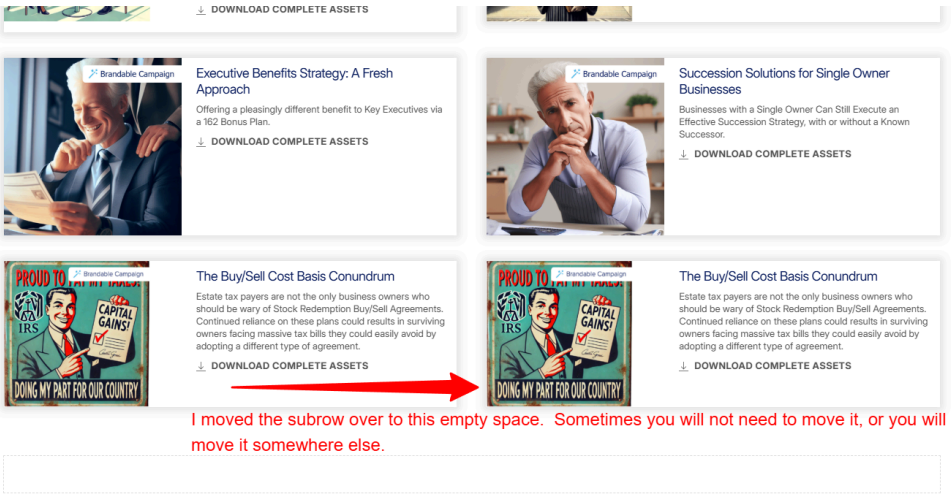
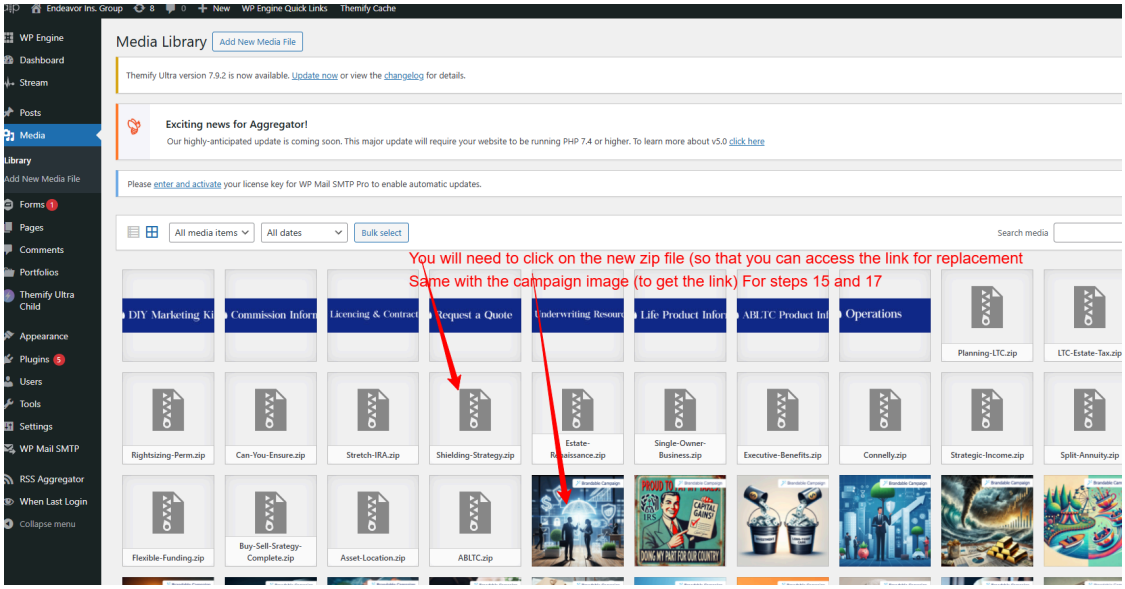
14. Move the subrow to an empty slot that makes sense.



15. To replace the campaign image, you will need to go to the media library, click the campaign image, and copy its url (see Step 15-pre-a ... also this image works for selecting the zip file for later)



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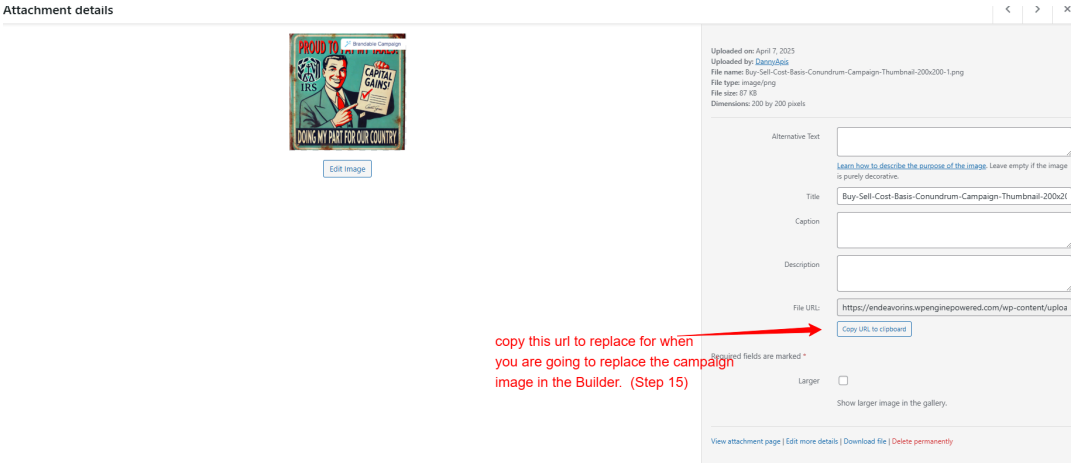
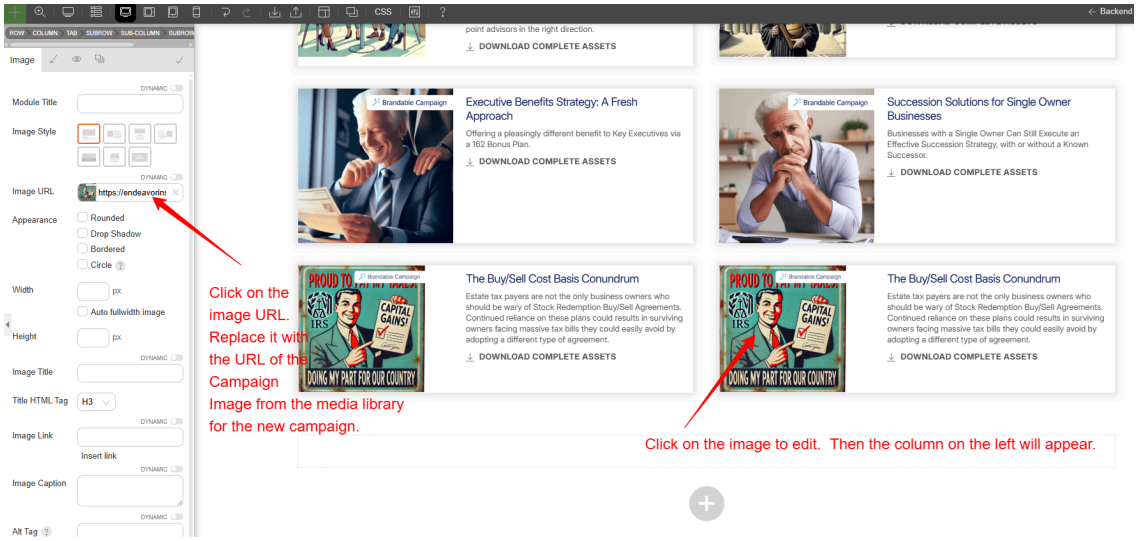
1. Once you've opened the campaign image, copy the url to your clip board



2. Go back to the Builder. Select the old campaign image and then replace the url with the new url in the left column

16. Change the content. Click the campaign title/content area and edit with the new title and summary



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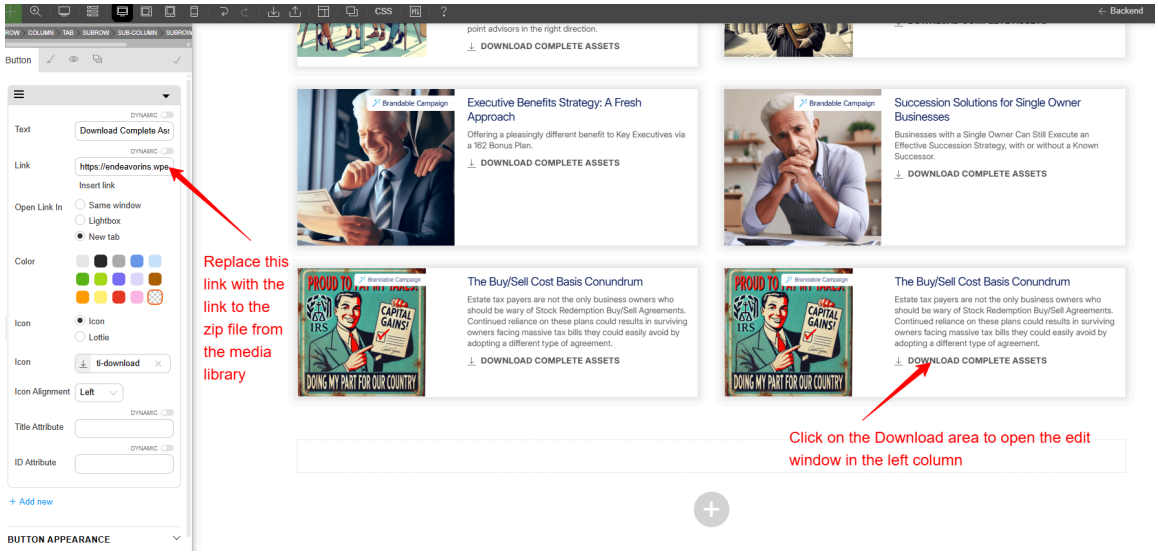
17. Change the zip file url. Grab that url from the media library, by selecting from the media library and copying the url (just like you did for the image) Then go back to the builder, click the Download Complete Assets to open the editor and replace the link on the left with the new zip url.



18. Then his save in the upper right corner (orange button) And you are done.

Support Tickets

If you have a problem or issue that you are not able to take care of yourself, please contact us via our technical support system at apisproductions.com/submit-a-support-request/

Submitting a Ticket

Please fill out this form fully, so that we have enough information to assist you quickly. Please do attach screenshots to illustrate your problem, if simply linking the page URL will not suffice. Thank you.