



PlanSponsorLink Branding

How-To Guide: Establish PlanSponsorLink Branding Guidelines

Overview

The purpose of this how-to guide is to provide an understanding of the PlanSponsorLink preferences that can be used to reflect your specific branding guidelines – making your online portal completely customized to your firm.

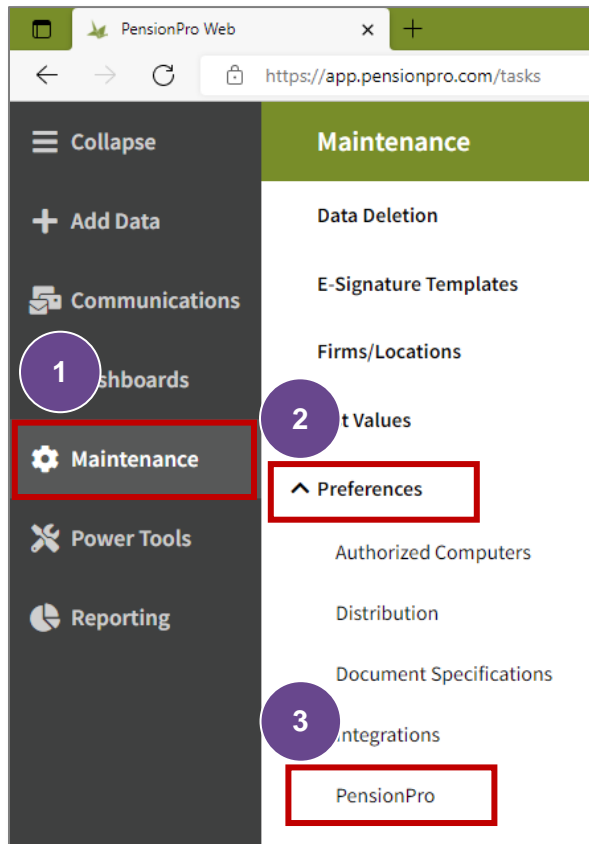
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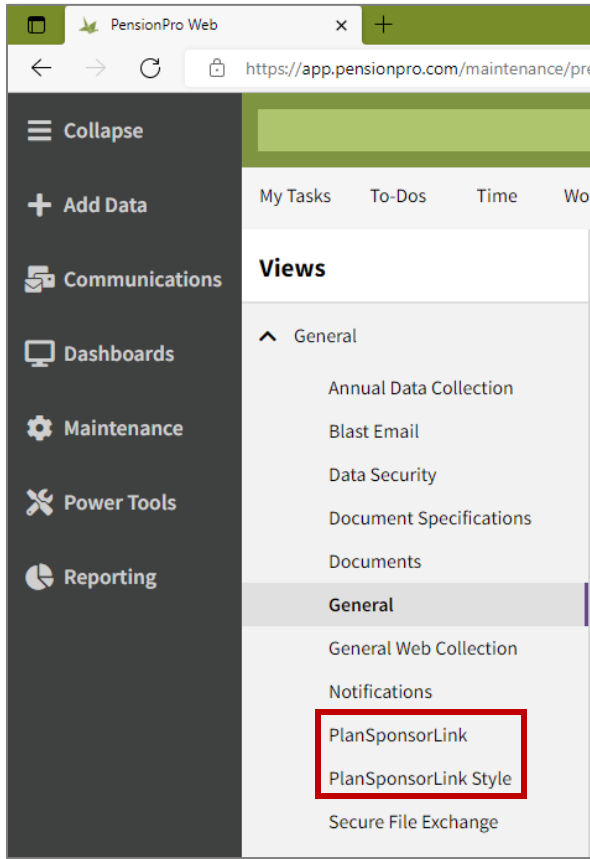
Access PlanSponsorLink Preferences

As a PensionPro user, you have full capabilities to customize your PlanSponsorLink site to reflect your specific branding guidelines. From the logo shown on the login page, to the colors displayed, you have full control to customize as you'd like.

To access PlanSponsorLink preferences:



1. From the Navigation Panel, select **Maintenance > Preferences > PensionPro**. *The General menu displays by default.*

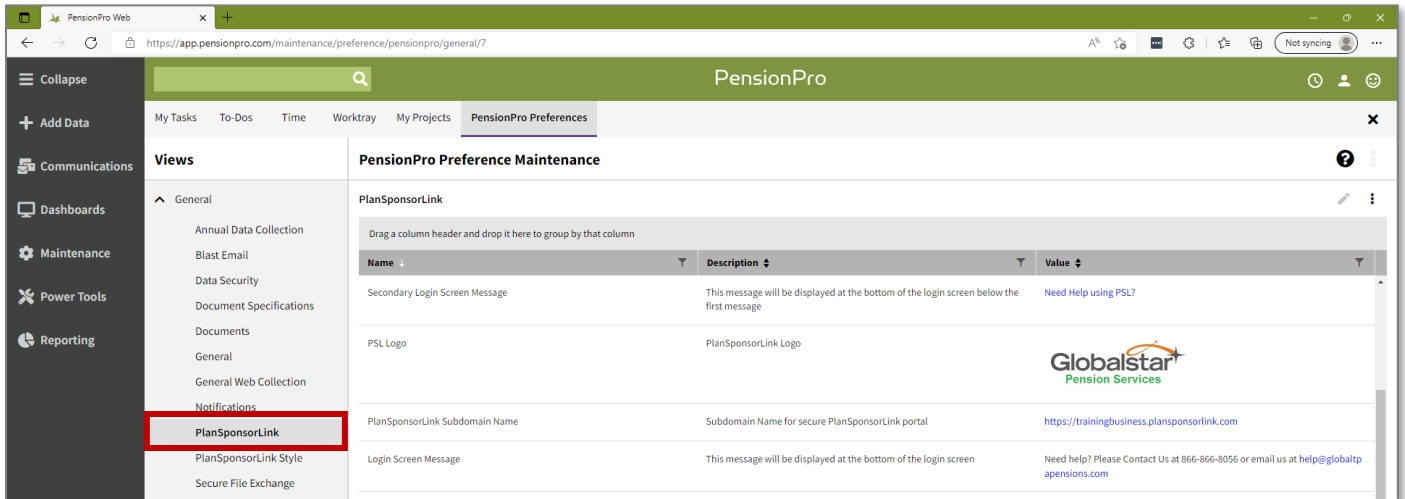


2. Click the desired PlanSponsorLink preference type from the menu. *The PlanSponsorLink or PlanSponsorLink Style preference grid displays.*

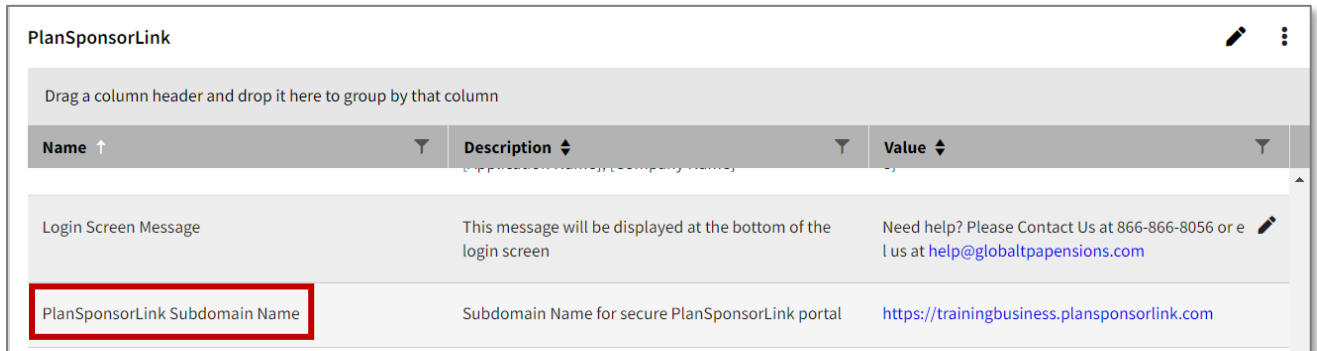
Customize the PlanSponsorLink Login Page

The PlanSponsorLink login page is the first thing your clients will see when accessing the portal. It is important to customize the login page to include your company logo, branding colors, and contact information for clients that may need assistance.

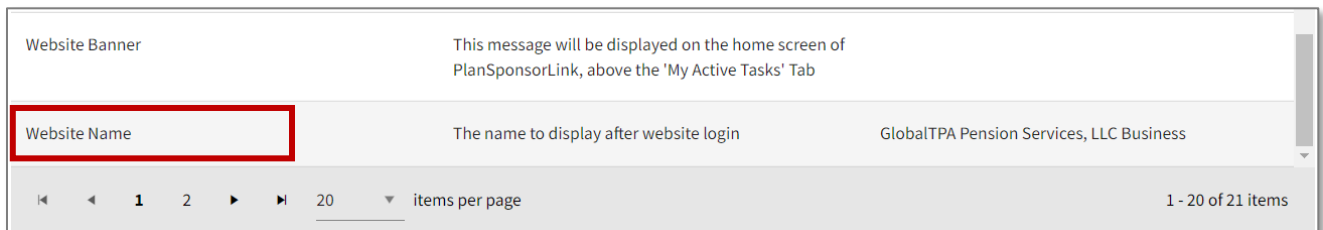
To customize the PlanSponsorLink login page:




1. Click **PlanSponsorLink** from the Views menu. *The PlanSponsorLink preferences grid displays.*



2. First, you will want to customize your URL. To do so, hover over the **PlanSponsorLink Subdomain Name** preference and click the **Edit** icon. Use the Value field to establish your custom URL. This is the URL your clients will use to access the portal.



- Next, hover over the **Website Name** preference and click the **Edit** icon. Use the Value field to establish your website name, which will display after logging into your custom PlanSponsorLink site.

Name ↓	Description ↓	Value ↓
Show Login Screen Message	Select Yes to show the Login Screen Message or No to hide it	Yes
Show Distributions Tab	Show the Distributions Tab on PlanSponsorLink	Yes
Show Bulletins Tab	Show the Bulletins Tab on PlanSponsorLink	Yes
Secure File Exchange Title	Title displayed for the Secure File Exchange Tab on PlanSponsorLink	Secure File Exchange
Secondary Login Screen Message	This message will be displayed at the bottom of the login screen below the first message	Need Help using PSL?
PSL Logo	PlanSponsorLink Logo	
PlanSponsorLink Subdomain Name	Subdomain Name for secure PlanSponsorLink portal	https://trainingbusiness.plansponsorlink.com
Login Screen Message	This message will be displayed at the bottom of the login screen	Need help? Please Contact Us at 866-866-8056 or email us at help@globalpensions.com

- Hover over the **PSL Logo** preference and click the **Edit** icon. A *pop-up displays, where you can upload your company logo.*
- Hover over the **Show Login Screen Message** preference and click the **Edit** icon. Use the Value dropdown to indicate if you would like to show the login screen message. Click **Save** when complete.
- Hover over the **Login Screen Message** preference and click the **Edit** icon. Use the Value field to customize the message displayed on the login screen. We recommend including contact information for those that may need assistance. Click **Save** when complete.
- Hover over the **Secondary Login Screen Message** preference and click the **Edit** icon. Use the Value field to customize the message displayed directly below the first message on the login screen.

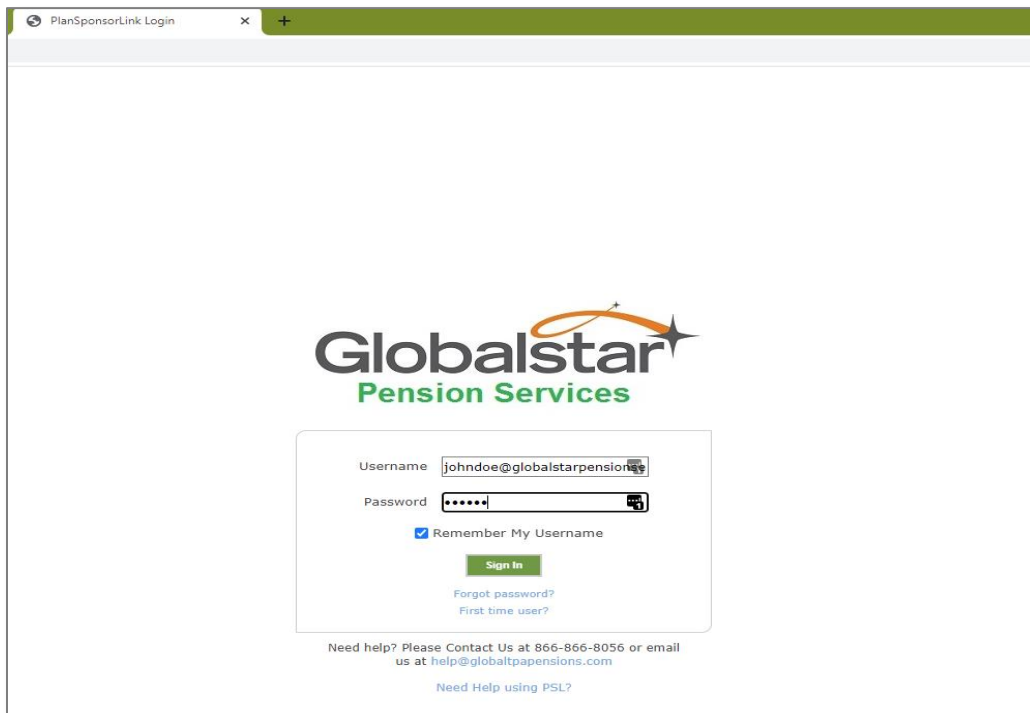
Views	PensionPro Preference Maintenance																					
<ul style="list-style-type: none"> Annual Data Collection Blast Email Data Security Document Specifications Documents General General Web Collection Notifications PlanSponsorLink PlanSponsorLink Style Secure File Exchange 	<p>PlanSponsorLink Style</p> <p>Drag a column header and drop it here to group by that column</p> <table border="1"> <thead> <tr> <th>Name ↓</th> <th>Description ↓</th> <th>Value ↓</th> </tr> </thead> <tbody> <tr> <td>Login Background</td> <td>The background color of the login screen, excluding the login box itself.</td> <td><input type="text"/></td> </tr> <tr> <td>Login Secondary Content Area Width</td> <td>The width of the content area below the contact content area.</td> <td>350</td> </tr> <tr> <td>Login Secondary Content Area Text Size</td> <td>The text size of the content area below the contact content area.</td> <td>12</td> </tr> <tr> <td>Login Secondary Content Area Text</td> <td>The text color of the content area below the contact content area.</td> <td><input type="text"/></td> </tr> <tr> <td>Button Background</td> <td>All buttons excluding download buttons. These buttons background color default is green.</td> <td><input type="text" value="#008000"/></td> </tr> <tr> <td>Button Text</td> <td>All buttons excluding download buttons. These buttons background color default is green.</td> <td><input type="text"/></td> </tr> </tbody> </table>	Name ↓	Description ↓	Value ↓	Login Background	The background color of the login screen, excluding the login box itself.	<input type="text"/>	Login Secondary Content Area Width	The width of the content area below the contact content area.	350	Login Secondary Content Area Text Size	The text size of the content area below the contact content area.	12	Login Secondary Content Area Text	The text color of the content area below the contact content area.	<input type="text"/>	Button Background	All buttons excluding download buttons. These buttons background color default is green.	<input type="text" value="#008000"/>	Button Text	All buttons excluding download buttons. These buttons background color default is green.	<input type="text"/>
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8. Click **PlanSponsorLink Style** from the Views menu. *The PlanSponsorLink Style preferences grid displays.*
9. Hover over the appropriate login screen preference and click the **Edit** icon. *An Edit Preference pop-up displays.*

Note: The following preferences are specific to the login screen: Login Background (color), Login Secondary Content Area Width, Login Secondary Content Area Text Size, Login Secondary Content Area Text (color).

10. Hover over the **Button Background** or **Button Text** preferences and click the **Edit** icon. Select the colors you wish to use or enter the custom Hex color code. When complete, click **Save**. *The Sign In button colors update immediately upon refresh on PSL.*

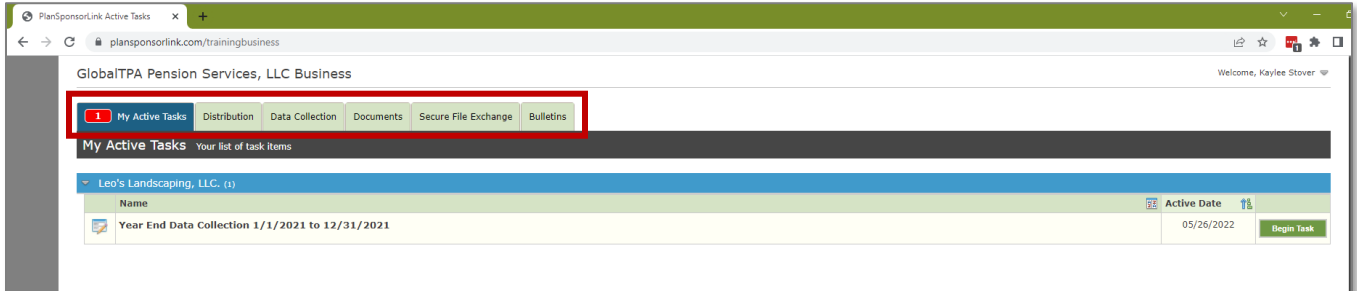
Note: Please note the button background and text colors set here apply throughout the portal, with the exception of download buttons.



11. Navigate to your firm's PlanSponsorLink URL to view the changes made to the login page. *The changes made via PlanSponsorLink preferences display immediately.*

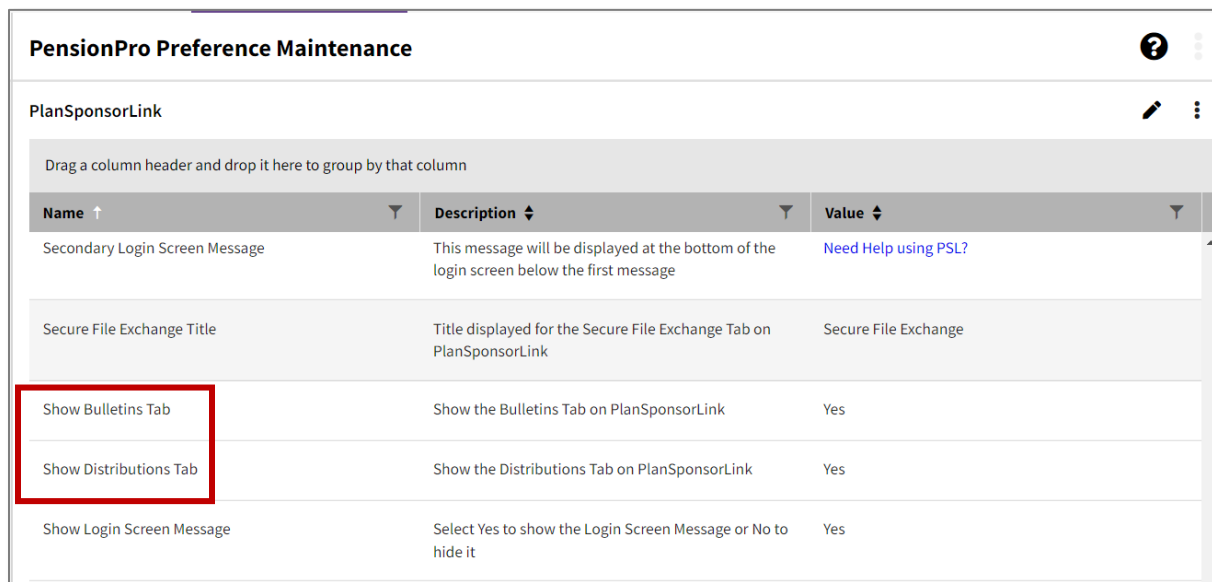
Customize the Tabs Shown on PlanSponsorLink

Upon logging into PlanSponsorLink, your client will be brought to the My Active Tasks tab shown below. The tabs along the top of the grid can be customized to fit your firm's specific needs. Let's take a look.



To customize the tabs shown on PlanSponsorLink:

1. From the Navigation Panel, select **Maintenance > Preferences > PensionPro > PlanSponsorLink**.
The PlanSponsorLink preferences grid displays.



2. Hover over the **Show Bulletins Tab** and **Show Distributions Tab** preferences and click the **Edit** icon. Use the Value field to indicate if the tabs should show on PlanSponsorLink. If 'No' is selected, the tabs will be omitted from the portal.

PensionPro Preference Maintenance

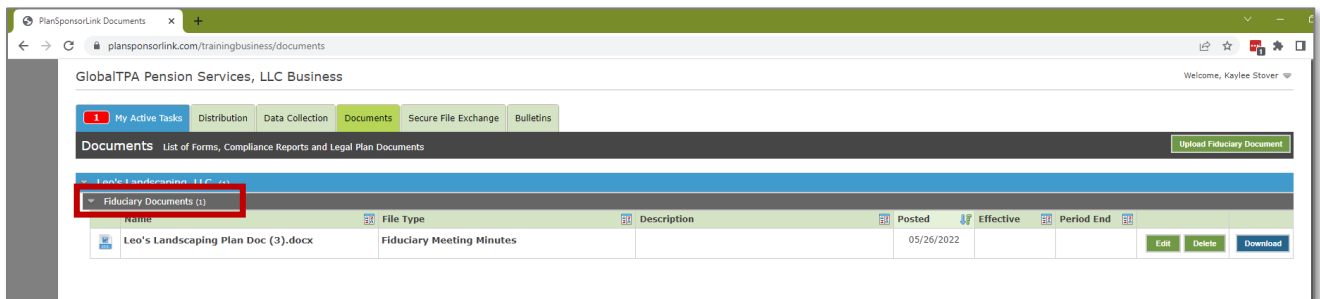
PlanSponsorLink

Drag a column header and drop it here to group by that column

Name	Description	Value
Access Denied Message	The wording that will be displayed on the web site when Website Operation is set to No	
Data Collection Title	Title displayed for the Data Collection Tab on PlanSponsorLink	Data Collection
Distribution Title	Title displayed for the Distribution Tab on PlanSponsorLink	Distribution
Document Title	Title displayed for the Document Tab on PlanSponsorLink	Documents
Enable Login Lockout	Enable temporary lock feature that is used when user attempts login with invalid credentials multiple times on PlanSponsorLink	Yes
Fiduciary Document Heading	Heading used for Fiduciary Documents on the Documents tab	Fiduciary Documents
Help Text	The wording that will be displayed on the Help pop up on PlanSponsorLink	PlanSponsorLink.com was designed to make access to your information quick and easy. If you are having trouble and need additional help or an explanation about a certain item on this site, please contact us for assistance.
Industry Bulletins Title	Title displayed for the Industry Bulletins Tab on PlanSponsorLink	Bulletins

3. Additionally, the names of the tabs displayed at the top of the grid can be customized. To edit the name of a tab, hover over it and click the **Edit** icon. For example, you may wish to change the Document Title preference to read 'Files' rather than 'Documents'. *The updated tab names will display immediately after refresh on PSL.*

Note: The following tab names can be customized: Data Collection, Distribution, Document, Industry Bulletins, and Secure File Exchange.

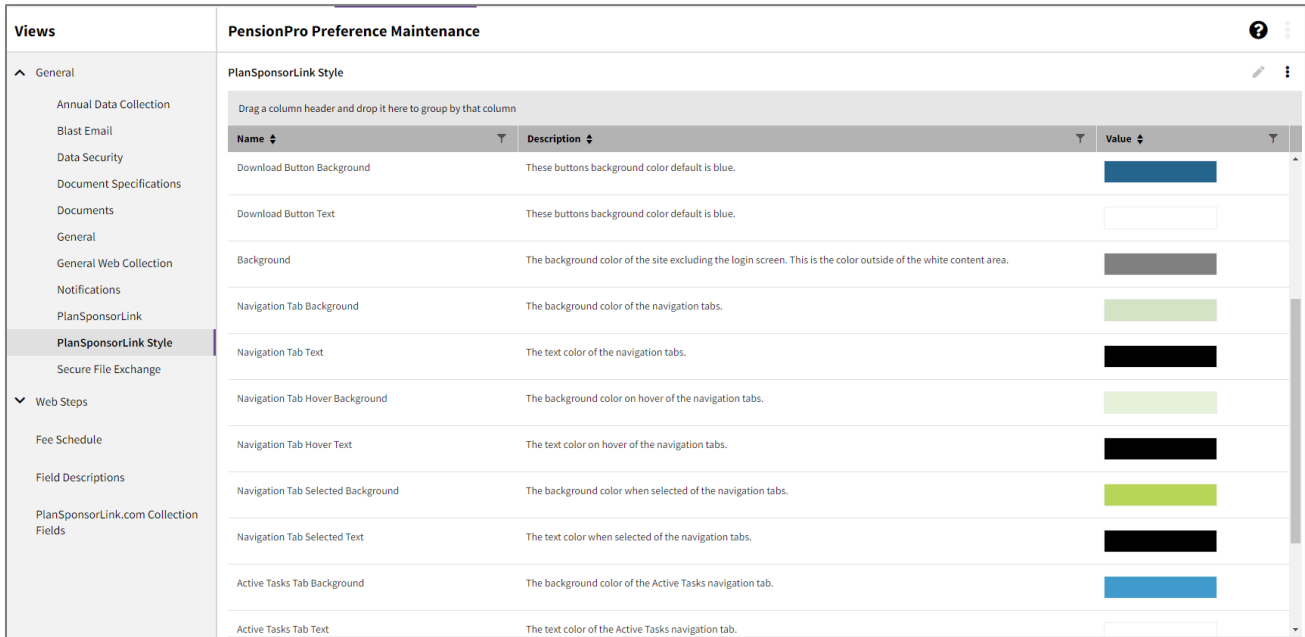


4. To edit the Fiduciary Document heading located on the Documents tab, hover over the **Fiduciary Document Heading** preference and click the **Edit** icon. Make the desired changes and click **Save**. *The updated heading name displays immediately after refresh on PSL.*

Customize the PlanSponsorLink Style

The PlanSponsorLink Style preferences allow you to customize the portal to meet your specific branding guidelines. The colors used throughout the portal can be modified to reflect your brand, making the site your own.

To customize the PlanSponsorLink Style:

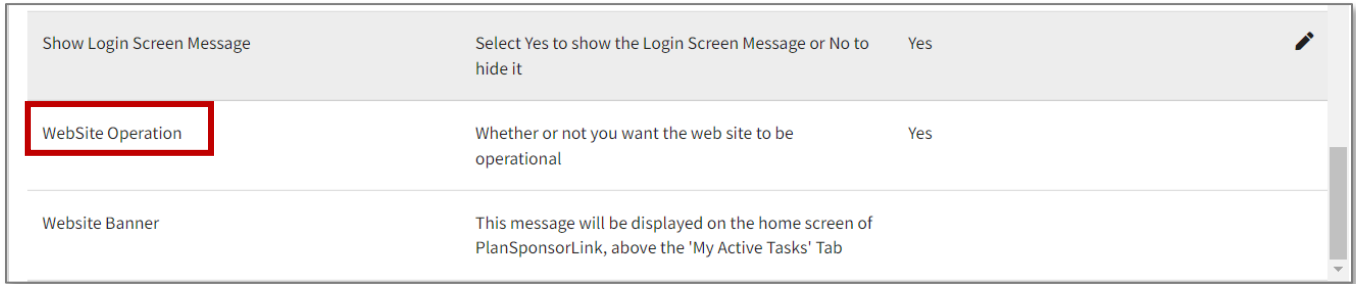



1. From the PlanSponsorLink Style Preferences grid, hover over the desired preference and click the **Edit** icon. Select the color you wish to use or enter the custom Hex color code. When complete, click **Save**. Perform these steps for any of the following preferences below:
 - Button Background and Button Text
 - Download Button Background and Download Button Text
 - Background (site background color, excluding the login screen)
 - Navigation Tab Background and Navigation Tab Text
 - Navigation Tab Hover Background and Navigation Tab Hover Text
 - Navigation Tab Selected Background and Navigation Tab Selected Text
 - Active Tasks Tab Background and Active Tasks Tab Text
 - Active Tasks Tab Hover Background and Active Tasks Tab Hover Text
 - Active Tasks Tab Selected Background
2. After changing a specific color, navigate to your PlanSponsorLink URL and refresh the page. *The changes display immediately after refresh, making it easy to test different colors for different items as you go.*

Disable the PlanSponsorLink Site

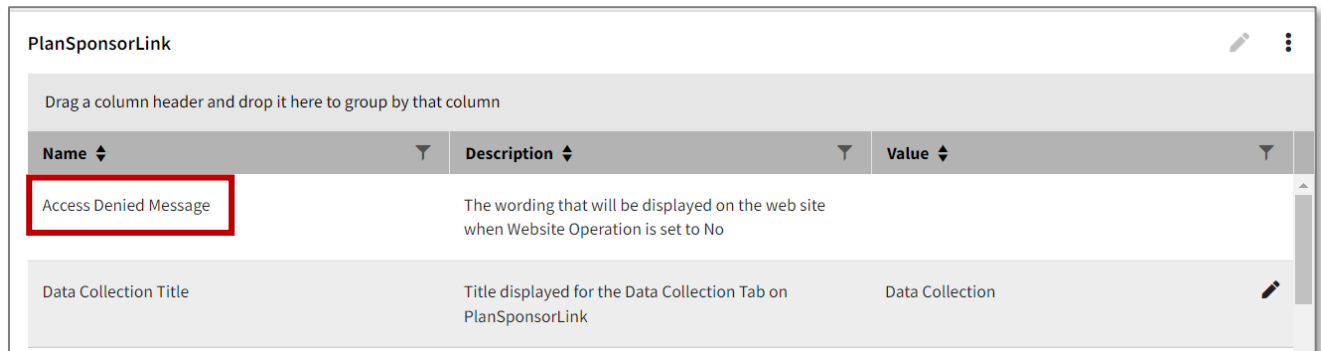
If for any reason you need to temporarily disable your PlanSponsorLink site so that clients are unable to login, this can be done rather quickly and easily. For example, if you accidentally upload the wrong files to the wrong clients, you may choose to temporarily disable the site until the corrections have been made.


To disable the PlanSponsorLink site:



Show Login Screen Message	Select Yes to show the Login Screen Message or No to hide it	Yes	
WebSite Operation	Whether or not you want the web site to be operational	Yes	
Website Banner	This message will be displayed on the home screen of PlanSponsorLink, above the 'My Active Tasks' Tab		

1. From the PlanSponsorLink preferences, hover over the **Website Operation** preference and click the **Edit** icon. Select **No** from the Value field. *Your PlanSponsorLink site is disabled.*



Name	Description	Value	
Access Denied Message	The wording that will be displayed on the web site when Website Operation is set to No		
Data Collection Title	Title displayed for the Data Collection Tab on PlanSponsorLink	Data Collection	

2. Hover over the **Access Denied Message** and click the **Edit** icon. Use the Value field to communicate to your clients why your website is temporarily down, and when they may expect to regain access. Your Access Denied Message may look something like the following: "Our website is currently undergoing routine maintenance and will be available shortly."