How to Personalise the Hub

The Hub is the main landing page for your customers when they log in to your Durell Portal. This guide will show you how to personalise the Hub with a number of custom amendments.

> We strongly **recommend using Chrome** instead of Firefox, Safari or any other browser to use all the features listed below.
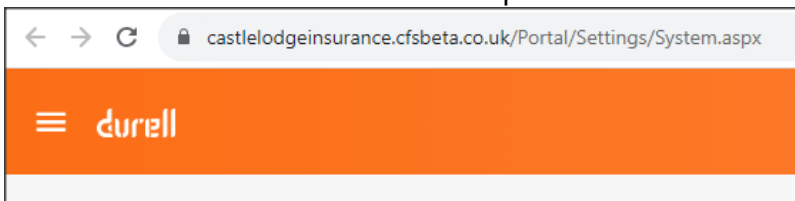
Follow the provided link for access

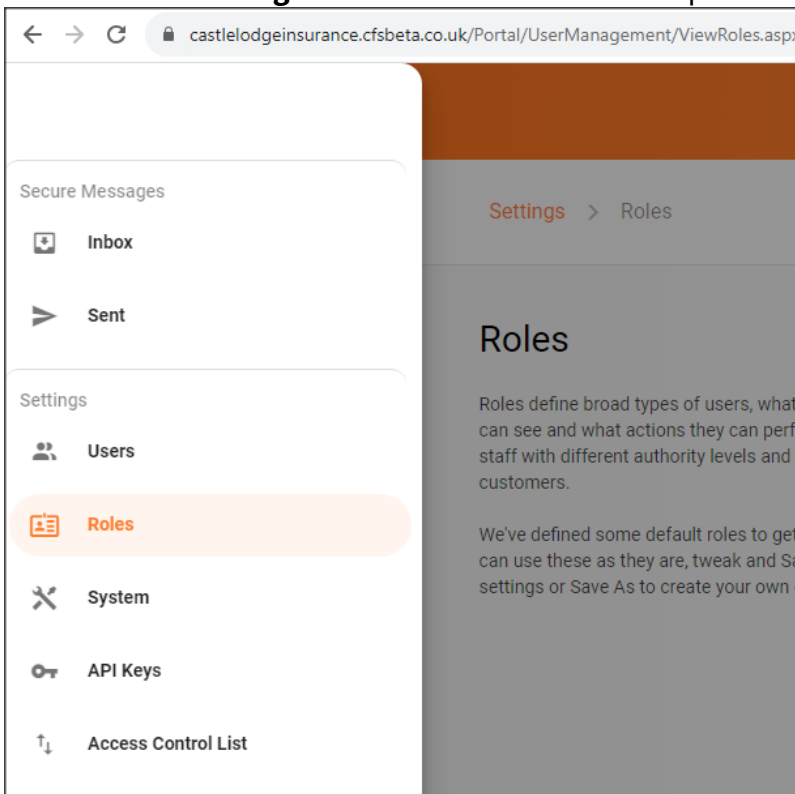Let's begin by logging into your Durell Portal.

Where to setup roles

Once you're logged into the Durell Portal.
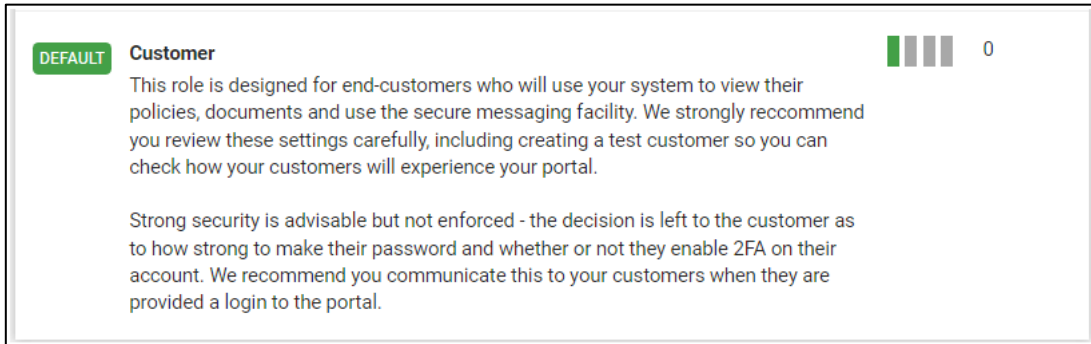
- Click on the ☰ **Menu** button in the top left

- Under the ⚒ **Settings** section click the 🪪 **Roles** option

Roles section

The default Role in the system for customers is the **Customer** Role. Click on this, or the appropriate custom role if you've one up (see guide **How to Use 'Roles' in the Durell Portal**), as this is where the options for Personalising the Hub are located

Below the Customer Portal header you will see the section for the Hub. Whether the Role can access the Hub or not is determined by the toggle alongside the section heading
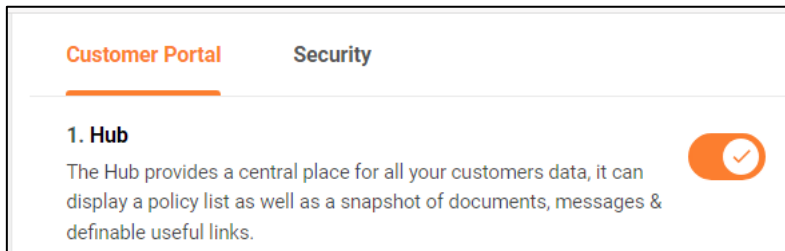

As described in guide **How to Use 'Roles' in the Durell Portal** you can review the access rights applicable to the Hub and set each one as you require. If any of the access rights are unclear please try them out with a test custom Role and user, or if stuck, please contact our Support team for help.

Welcome Message

You can type in your own welcome message, which can include any field from the main Durell CRM screen (aka "Client Screen").

How to edit
- Add the field name with a **%** sign at each end
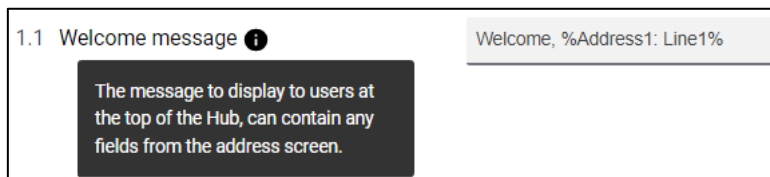
For example, using %Address1: Line1% will bring through the first line of the customer's address, which is typically used for their full name, e.g. "Mr Sami Patel". If you use the Salutation field in Durell for a less formal greeting, you can use %Salutation% in your welcome message to bring through that instead, e.g. "Sami".

This flexibility allows you to make the greeting more personal to your customers.

Secure Messaging, Recent Documents and Policies

You can choose whether or not a customer's Hub displays summaries from other modules in the Durell Portal. Display Messages, Recent Documents and Policies by toggling the relevant access right (see guides **How to Use Secure Messaging Basics in the Durell Portal** and **How to Show Docs and Policies in the Durell Portal** to learn more about these modules).

The option to **Label quotes as 'Enquiries'** makes the Policies summary more understandable to your customers if you use a Scheme or Fact Find in the Durell Portal to capture prospects (contact our Sales team to find out more!)
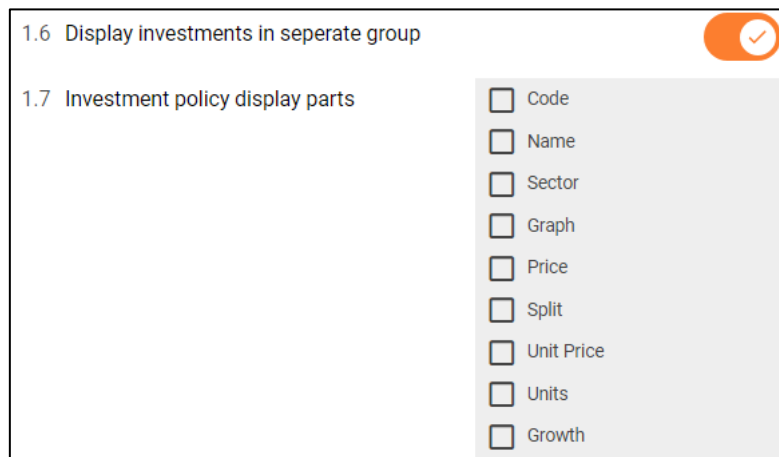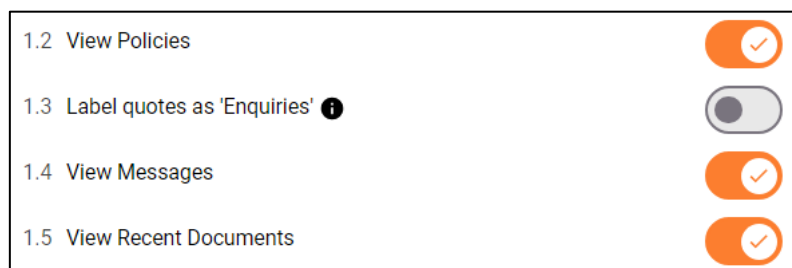
Policy Selection

You can exclude policies based on the Product Type and Policy Stage of the policies in Durell; the drop-down boxes for each option allow the selection of multiple Product Types and Stages

1.8	Exclude policies with types	⌄
1.9	Exclude policies with stages	⌄

You can also choose to show Investment policies in their own section and if so, you can customise the information displayed
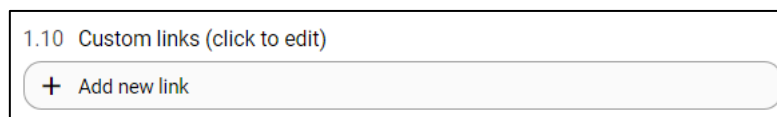
1.6	Display investments in seperate group	✓
1.7	Investment policy display parts	☐ Code
		☐ Name
		☐ Sector
		☐ Graph
		☐ Price
		☐ Split
		☐ Unit Price
		☐ Units
		☐ Growth

Custom Links

The final option is one of the most powerful, click **+ Add new link** to explore this feature.

1.10	Custom links (click to edit)
	+ Add new link

There are three types of **Custom links** that you can add:
1. the **Link** option allows you to include links to other web sites
2. **FAQ** allows you to answer your customers' common questions in the Hub
3. **Image** allows you to display images, e.g. your logo or accreditations, and optionally have those images link to other web sites as well.

You can edit an existing link by clicking it, which displays the same settings as when you first added it – these are discussed in detail below. You can also click the **X** on the right-hand-side of an existing link to delete it


Links combine the visual queue of an icon and a text label to launch a link to other pages of your website or to other internet sites of interest to your customers.

For example 'get-a-quote' links or links to your product information pages; links to your network, product providers, claims handlers, etc.

How to add a new link
- When adding a new link, select the **Link** option
- Type the text to be displayed in the **Text** field
- Enter the website address in the **URL** field.
  You can choose if clicking the link opens the web site in a new tab – if this option is not ticked, the link will take the customer away from the Hub.
- Finally pick an icon to appear alongside the link to give it more visual impact.
- Once done, click **OK** or **Cancel** to exit without adding the link.
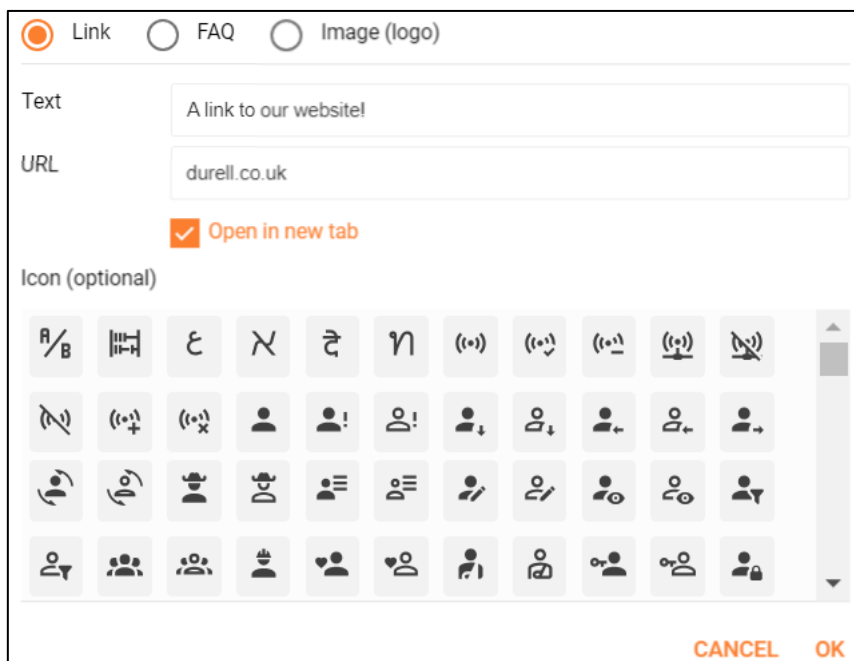
FAQs are a text label with associated pop-up of text. These are a nice way to answer common questions your clients may have.

How to add a new link
- When adding a new link, select the **FAQ** option

- Type the text label for your FAQ, typically a question
- In the **Text** field and enter the details to display in the pop-up, typically the answer to the question in the **Body** field below.
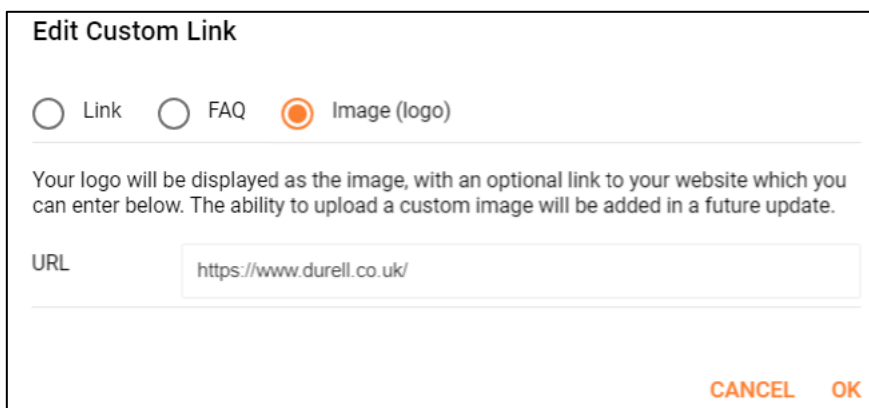- Once done, click **OK** or **Cancel** to exit without adding the FAQ.

Image links are an image with a website link behind it, for example the full version of your logo with link to open your website homepage. In the launch version you can only use the main logo you set in System (see guide **How to Use Edit Branding in the Durell Portal**) as an image but we are working on allowing you to upload other images.

How to add a new link
- When adding a new link, select the **Image (logo)** option
- Enter the website address in the **URL** field.
- Once done, click **OK** or **Cancel** to exit without adding the FAQ.

To apply any changes to the Role, or revert to the default settings use the buttons at the top of the screen (see guide **How to Use 'Roles' in the Durell Portal**).