


Client Help Administration



The Client Help Administration allows users to manage online help and user documentation specific to an organization. The program-specific online documentation is available to users with the appropriate role from the Help icon.

Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to Client Help Administration via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the My Preferences gear icon  at the top right of the header menu.
3. Hover to display the **VMS Settings**, and click **Client Communications**.
4. Click **Client Help Administration** in the list of available Client Communications Self-Service features to display selection options.

How to Add New Menu items:

Complete steps 1-4 above.

5. Click **Add New** from the Client Help Menu Administration screen.
6. Fill out the **Name** field, which specifies what will display in the menu.
7. You have the option of adding a **Description** to better identify the menu item with.
8. Select a **Display Order**, which will specify the order the added menu item will appear in the menu.
The "Display Order" will not be displayed if the parent menu is configured to sort items by name.
9. The Active checkbox will be checked by default. If you do not want the menu item to be active, simply uncheck the box.
10. Select the **Type** (Menu or Attachment)
 - **Menu:** specifies if the item is a parent menu
 - If you select Menu, the **Menu Options** section will appear where you can select whether you want to sort items by name or not. If you do not want it to sort by name, simply uncheck the box.
 - **Attachment:** means it will be a link to an attachment
11. Update the Visibility (which defaults to *everyone*); to make it only visible to selected roles or business Organization Types. If you choose **Selected Roles** or **Business Organization Types**, the appropriate fields will appear in order, to select which specific roles or Business Organization Types should have visibility.

Main Benefits:

- 100% Self-Service
- Allows you to update at the speed of business.
- Provides the ability to keep your users up to date on your latest program content changes.

Things to Note:

- Menu items are only visible if visibility is granted to that user.
- If you create a menu item with **Menu** selected as the menu type, it will not show until a child menu attachment is created under it. New **Menus** are added as **Folders** to the **Parent Folder** or **Menu**. To add something to a **Menu/Folder**, click on the desired folder first and then select **Add New**.
- If you create a menu as an attachment type, it will show immediately.
- Client Help Menu Items can be nested up to 3 levels deep.