Web Site Customization - 3rd Party Developers

VERY IMPORTANT: Please notify us before starting your development work, so that we may switch the template over to a custom template in the system.

How To Get Started

Below it is listed what is needed if you will use a 3Party developer for your website design and development. A member of Broadridge will send you a zip package to use for the delivery of your assets. Your assets will then be uploaded and placed in the respective areas of the CMS by Broadridge developer.

3rd Party Package Contents:

3rdParty-WebsiteCustomization-MUST-READ.docx
This is this documents opened.

Folders

- External CSS
- External JS
- Fonts
- Images
- Examples of Page Templates

HTML Files

- Compliance-Approval-MUST_READ.html
- Custom(HTML).html
- Custom Navigation.html
- JavaScript.html
- HeaderCode.html
- FooterCode.html
- HomepageCode.html

Frequently Asked Questions

1. What is this package, and what am I sending to Broadridge Advisor Solutions?
This package is intended to make the process of sending assets to us more efficient. Because we do not troubleshoot any code or review any of its contents, we need a consistent method to implement client assets. The only folders that are to be sent back to us in this package are: custom-HTML / additional footer, head, hi-res images, navigation/header code. The rest of the folders are for your reference. Please see the page templates for guidance on where the code is placed by us.

2. What type of code do I need to know to work within your system?
HTML and CSS skills are required in order to develop within our system. In most cases you would also need to know JavaScript or Jquery.

3. Do I get FTP access?
No, we do not grant FTP access to any third-party developers. All files can be uploaded through the Client's "Stored files" except for JavaScript files. In Site Admin it's located under "Site Basics." If you need to upload JavaScript or hi-res images, you need to send the files to us to upload.

4. What kind of template am I working with?
For your convenience, we have provided the different types of DOM structures you will be working with. Please see the "Examples of Page Templates" folder.

5. Can I access the server-side code?
No. Because our websites share a master template, we do not grant access to any sections of the master template. All code needs to be added through the Site Admin. In some cases you can send the HTML code (such as navigation code) for us to implement.

6. Can I build the site admin around this custom website?
No, our Site Admin was engineered for the entry of data by clients on a template site.

7. Can I set up a blog through this admin?
No, our system does not support a blog at the moment. You can however, create a blog elsewhere and link it from you site to this page.

6. What is this "Asset Table" folder for?
When doing custom work, you might come across an instance when you have to use JavaScript to add an element, or CSS to apply an image as a background, for example. If the element being added has meaning, it needs to be reviewed by compliance. But because the element isn't being applied in a way for compliance to review on its dashboard, there has to be a way for compliance to do so. This table serves as a method to submit these assets for review. It is a template for you to use. DO NOT send back to us to implement. We will not submit these assets for review on your behalf.

7. How long does it take the team to upload the assets?
Please allow up to four (4) business days for your assets to be uploaded by our team.

Things to know:

- If for some reason you still need assistance, we offer a free 30-minute consultation call. Client also needs to be on this call if you choose to take advantage of it. If you need further assistance after this call, we can do so at a bill rate of $150/hour.

- Client needs to be copied on all correspondence to Broadridge Advisor Solutions.

- Our system has two environments: Preview and Live. You will be developing in the Preview environment. When you submit assets to us, we implement them in the Preview environment. After a site has been submitted to compliance and approved, you need to notify us to push the code you sent to us, from the Preview to the Live site.

- Hit “**Update Site**” only when you have completed development in the Preview environment. This action will submit content added through the Site Admin to compliance for review.