

Content Management

CMS Admin Panel Tutorial

How to Manage Your Website Content Like a Pro

Prepared for: Mahabodhi Residential School

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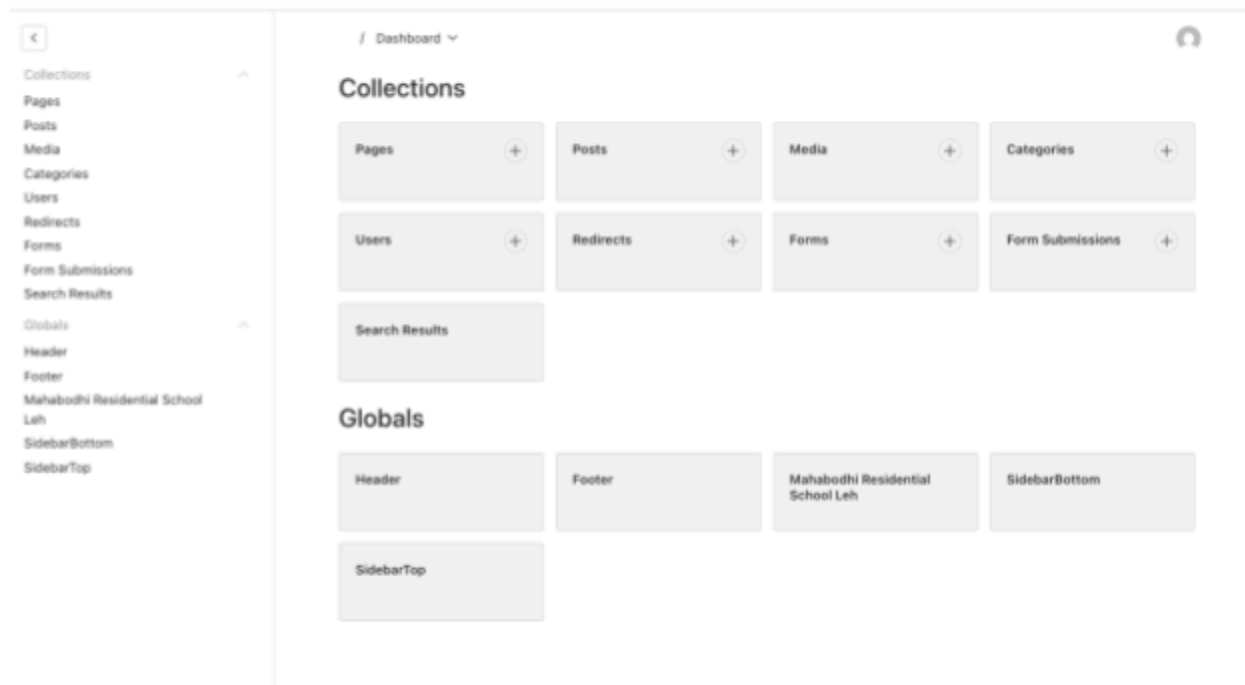
Logging In to the Admin Panel

1. Logging In to the Admin Panel

1. Open your preferred browser (Chrome or Firefox recommended for best experience).
2. Go to: <https://yourdomain.com/admin> (your developer provided the exact URL—bookmark it!).
3. Enter your **email address** and **password**.
 - If it's your first time or password reset needed: Click "**Forgot password?**" → follow the email link your developer sends.
 - First-time users: Developer may have emailed a magic link or temporary credentials—change password immediately after first login.
4. Click **Log In**. You'll land on the **Dashboard** page.
5. **Security reminders:**
 - Never share credentials.
 - Use a password manager.
 - If suspicious activity occurs or someone leaves the team, notify your developer immediately to revoke access.

Tip: Enable browser "Remember this device" only on trusted computers.

Fig 01: Dashboard



2

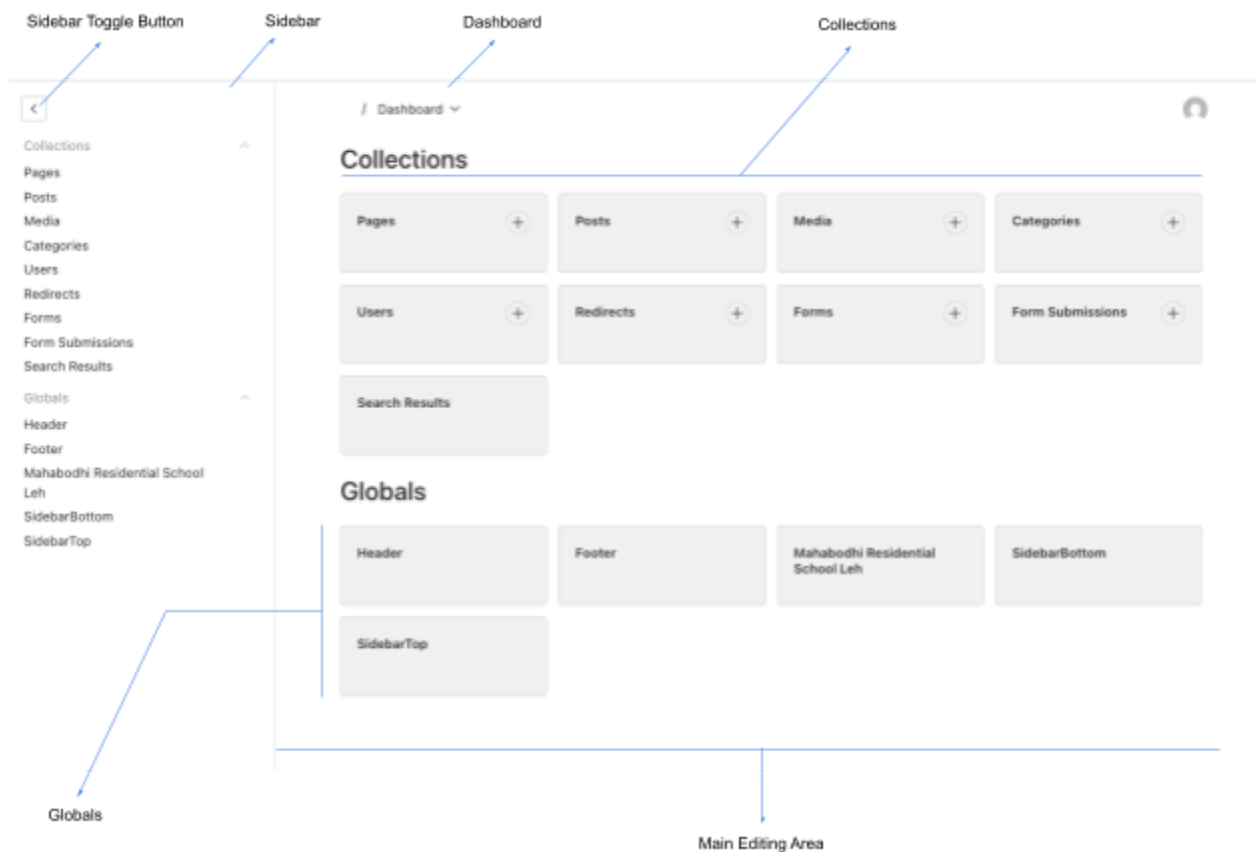
Understanding the Dashboard & Navigation

2. Understanding the Dashboard & Navigation

- **Left Sidebar** (main menu—can collapse/expand with ☰ hamburger icon top-left):
 - **Dashboard** — home screen with overview widgets.
 - **Collections** — grouped content types (e.g. Pages, Blog, Users, Testimonials).
 - **Globals** — single-instance settings (e.g. Header, Footer, General Settings).
 - **Media** — all uploaded images/files.
 - Bottom: Your name/avatar → Account settings & Logout.
- **Top bar** (always visible):
 - Notifications bell (if any alerts or mentions).
 - Theme switcher (light/dark/system mode—pick your preference).
 - Logout button.
- **Main content area:** Where all editing happens—changes dynamically based on what you click.

Pro navigation tips:

- Collapse sidebar when editing full-screen → more room for content.
- Refresh page (F5 or Cmd+R) if something looks stuck.



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Managing Collections

3. Managing Collections (e.g. Pages, Blog Posts, Users, Bulletin Board)

Collections hold repeatable items (like blog articles or users, pages).

List View (overview screen):

1. Click the collection name in the sidebar (e.g. "Pages").
2. See table of all items:
 - Columns: Title, Status (Draft/Published), Author, Date, etc.
 - **Search** bar top — type keywords to filter instantly.
 - **Filters** (if enabled): Click filter icon → narrow by category, status, date.
 - **Sort**: Click column headers (e.g. click "Title" to A–Z).
 - Pagination at bottom if more than one item.
3. **Create new**: Click green **+ Add New** button (top-right).
4. **Bulk actions** (if enabled): Select rows with checkboxes → delete/archive/publish multiple.

The screenshot shows the 'Pages' collection overview. The sidebar on the left contains a menu with items like 'Collections', 'Pages', 'Bulletin Board', 'Media', 'Categories', 'Users', 'Redirects', 'Forms', 'Form Submissions', 'Search Results', 'Globals', 'Header', 'Footer', 'Mahabodhi Residential School', 'Leh', 'SidebarBottom', and 'SidebarTop'. The 'Pages' item is selected. The main content area is titled 'Pages' and includes a 'Create New' button. Below the title is a search bar labeled 'Search by Title' and two dropdown menus for 'Columns' and 'Filters'. The table below has three columns: 'Title', 'Slug', and 'Updated At'. Each row represents a page and includes a checkbox for selection. The pages listed are: 'Contact Us', 'Photo Gallery', 'Quick tour of the School', 'Self Certification By The School', 'Mandatory Disclosure', 'Withdrawal Policy', 'Admission Form', 'Fee Structure', 'Admission Procedure', and 'Admissions'. All pages show an 'Updated At' date of 'January 25th 2026, 12:15 PM'. At the bottom, there is a pagination bar showing '1' of 10 pages and a 'Per Page: 10' dropdown.

<input type="checkbox"/>	Title	Slug	Updated At
<input type="checkbox"/>	Contact Us	contact-us	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Photo Gallery	photo-gallery	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Quick tour of the School	quick-tour-school	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Self Certification By The School	academics	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Mandatory Disclosure	mandatory-disclosure	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Withdrawal Policy	withdrawal-policy	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Admission Form	admission-form	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Fee Structure	fee-structure	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Admission Procedure	admission-procedure	January 25th 2026, 12:15 PM
<input type="checkbox"/>	Admissions	admissions	January 25th 2026, 12:15 PM

Edit / Create View (single item screen):

1. Fields appear in logical order (your developer organized them).
 - Required fields marked with * (red asterisk).
 - Text, number, date pickers, dropdowns, checkboxes.
 - **Rich text** fields → see dedicated section later.
 - **Upload/relationship** fields → pick from Media or link to other collections.
2. **Auto-save**: Most changes are saved as draft automatically every few seconds.
3. **Save controls** (usually bottom sticky bar or top-right):
 - **Save Draft** — keep private/unpublished.
 - **Publish / Save & Publish** — make live on the website.
 - **Status toggle** — Draft ↔ Published.
 - **Delete** — red button, requires confirmation (irreversible).
4. **Sidebar tabs** (right side or below):
 - Main fields
 - Versions/History (see section 6)
 - Relationships (if linked items)
 - API / JSON preview (for developers—ignore unless asked)

Common actions:

- Duplicate item → save as new → edit title/slug.
- Change slug (URL part) → careful: may break old links—coordinate with developer.

Collections

Pages

Bulletin Board

Media

Categories

Users

Redirects

Forms

Form Submissions

Search Results

Globals

Header

Footer

Mahabodhi Residential School

Leh

SidebarBottom

SidebarTop

/ Pages / About Us

Edit

API

About Us

Last Modified: January 25th 2026, 12:15 PM Created: January 25th 2026, 12:15 PM

Title *

About Us

Published At

Hero

Content

SEO

Type *

Low Impact

Slug

about-us

Unlock

Slides

Collapse All

Show All

Slide 01

Parent

About 01

Breadcrumbs

Collapse All

Show All

Breadcrumb 01

URL

Label

about

About

Breadcrumb 02

URL

Label

about/about-us

About Us

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Managing Globals

4. Managing Globals (Site-wide Content)

Globals are single records for shared content (no list—just one editor screen).

Examples: Header menu, Footer copyright, Contact details, Homepage hero text.

Workflow:

1. Click a Global in the sidebar (e.g. "Header" or "Footer").
2. Edit fields directly (similar to collection edit view).
3. Most changes live immediately site-wide after **Save / Publish**.
4. Some Globals have tabs or sections—explore them.
5. No "draft" concept usually—edits are live (but versions may exist).

Tip: Small text changes here (e.g. phone number) update everywhere instantly—great for quick fixes.

The screenshot displays the 'Header' global edit interface. On the left, a sidebar lists various site components, with 'Globals' expanded and 'Header' selected. The main area shows the 'Header' title and a list of 'Nav Items'. The first item, 'Nav Item 1: Home', is expanded to show its configuration. The 'Link' section is active, showing 'Internal link' as the type and 'Home' as the document to link to, with the label also set to 'Home'. The 'Open in new tab' option is checked. Below the main link section is a 'Sub Links' section with an 'Add Sub Link' button. At the bottom of the list, there is an 'Add Nav Item' button.

5

Working with Media

Images & Files

5. Working with Media / Images & Files

Dedicated "Media" collection for uploads.

Uploading & Managing:

1. Sidebar → **Media**.
2. **+ Add New** or drag & drop files anywhere on screen.
3. Supported: JPG, PNG, WebP, SVG, PDF, videos (depending on config).
4. Edit item → click thumbnail:
 - **Alt text** — mandatory for accessibility & SEO (describe image clearly).
 - Title / caption.
 - Focal point (click to set crop center for thumbnails).
 - Custom fields (if added: e.g. photo credit, category).

Using in content:

- In collection/global fields: Click upload icon → "Upload New" or "Choose Existing".
- Drag & drop image directly into rich text fields (see section 7).
- Resize/caption often available inline.

Best practices:

- Compress large images before upload (tools: tinyjpg.com, ImageOptim).
- Always fill alt text: "Red sports car driving on coastal road at sunset".
- Reuse existing files when possible—keeps the library clean.

6

**Using Drafts, Versions,
Publishing & History**

6. Using Drafts, Versions, Publishing & History

- **Drafts:** Unfinished/private versions (not live on site).
 1. Auto-created when editing.
 2. Status shows "Draft" until published.
- **Publishing:** Makes content visible on frontend.
 1. Click **Publish** → confirm if prompted.
 2. Some setups have scheduled publish (date/time picker).
- **Versions / History** tab (usually right sidebar or tab):
 1. See full timeline: who changed what, when.
 2. Click version → **Compare** side-by-side (green additions, red removals).
 3. **Restore** → roll back to the old version (great for mistakes).
 4. **Preview** old versions if live preview enabled.

Workflow tip: Work in draft → use preview (if set up) → publish when 100% ready.

7

Working with Rich Text Fields (Detailed Guide)

7. Working with Rich Text Fields (Detailed Guide)

Rich text fields let you write formatted content (like Word/Google Docs) with headings, lists, images, links, etc. Payload uses the modern **Lexical** editor—clean, fast, and powerful.

Appearance & Toolbar:

- Large editing area with placeholder text (e.g. "Start typing...").
- **Toolbar** appears when you select text (floating/inline) or stays fixed at top (depending on config).
- **Slash menu** (/): Type / anywhere → quick insert menu (headings, lists, media...).

Core Formatting (most common buttons):

- **Bold** (⌘/Ctrl + B) — strong emphasis.
- **Italic** (⌘/Ctrl + I) — subtle emphasis.
- **Underline** — less common, use sparingly.
- **Strikethrough** — crossed out text.
- **Headings**: H1 (main title—use once per page), H2, H3, H4 (subsections).
- **Paragraph** — normal body text (default).
- **Lists**:
 - Bullet (unordered) — • Item
 - Numbered (ordered) — 1. Item
 - Indent/outdent with Tab/Shift+Tab.
- **Quote / Blockquote** — pull-quote style (indented with border).
- **Code** — monospace for snippets (inline code or block ````code`
- **Align** — left/center/right (use center for images sometimes).

Links:

1. Select text → click link icon (chain).
2. Paste URL or search internal pages (if configured).
3. Options: Open in new tab, add rel="nofollow" (SEO/marketing).
4. Remove link → select linked text → unlink button.

Images & Media Inserts:

1. Type / → "Upload" or "Media" option, or click image icon.
2. Drag & drop image directly into editor.
3. Choose existing from the Media library.
4. After insert:
 - Resize (drag corners).
 - Add caption (type below image).
 - Align left/center/right.
 - Add alt text (critical—edit via media library if missed).

Advanced / Custom Inserts (if enabled by developer):

- **Tables** — insert grid, add rows/columns.
- **Horizontal rule** — divider line.
- **Blocks** — pre-made components (e.g. Call-to-Action banner, testimonial carousel, code block with syntax highlighting).
 - Type / → look for custom names.
 - Edit block fields inline.
- **Relationships** — embed other content (e.g. link to product card).

Saving & Behaviors:

- Auto-saves as draft constantly—no "save" needed mid-edit.
- Empty field → starts as null, becomes empty paragraph JSON after typing/deleting.
- Preview → some setups show live frontend preview button.

Tips for great rich text:

- Use headings for structure (helps SEO & readability).
- Keep paragraphs short (3–5 lines max).
- One H1 per page (main title).
- Add alt text to every image.
- Avoid too many colors/styles—stick to defaults for brand consistency.
- If stuck → select text → look for the "toolbar", or type / for options.

8. Account Settings & Personal Preferences

Click your name/avatar (bottom sidebar) → **Account**:

- Change password.
- Update email (if allowed).
- Language (if multi-language site enabled).
- Theme: Light / Dark / System (syncs with OS).
- Timezone (affects date displays).
- Notification preferences (if set up).

9. Best Practices & Pro Tips

- Descriptive titles & slugs → good for URLs & search.
- Alt text on every image → accessibility + Google Images traffic.
- Work in drafts → preview → publish.
- Use versions before big changes.
- Small global edits (phone, address) → instant site-wide update.
- Clear naming: "Blog Post – Title Here" not "Untitled".
- Avoid delete unless sure—restore from versions instead.
- Refresh browser or log out/in if UI glitches.

10. Troubleshooting Common Issues

- "Unauthorized / Logged out" → session expired—log in again.
- Fields missing → permissions—ask the developer.
- Images broken on site → ensure published & ask dev to clear cache.
- Rich text toolbar not showing → select text or type /.
- Slow editor → large content or many images—normal; save often.
- Changes not appearing live → check publish status + cache (ask dev).

Always: Screenshot + describe steps → send to developer.

Appendix: Quick Glossary

- **Collection** — repeatable items (posts, products...)
- **Global** — one-off site-wide content
- **Draft** — unpublished version
- **Slug** — URL-safe title (e.g. my-blog-post)
- **Rich Text** — formatted content area
- **Lexical** — modern editor engine (fast & customizable)
- **Alt text** — image description for screen readers & SEO