

Content Management

CMS Admin Panel Tutorial

How to Manage Your Website Content Like a Pro

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Date: January 27, 2026

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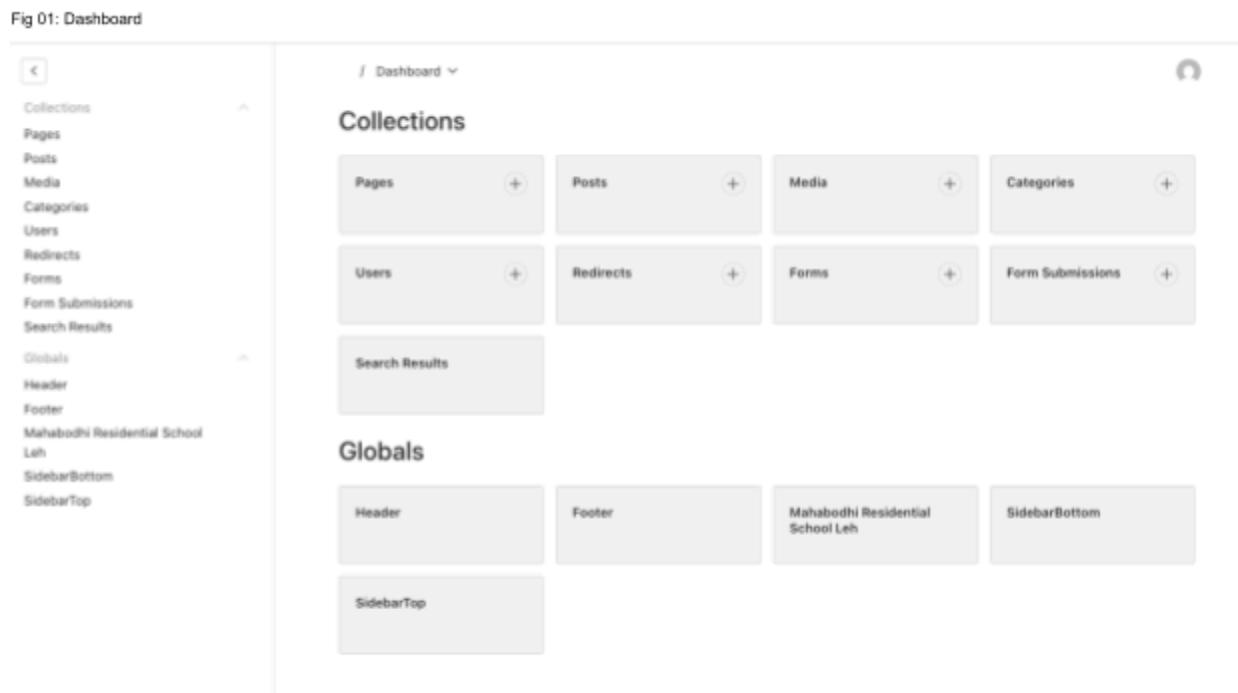
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Logging In to the Admin Panel

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**.
 - o If it's your first time or password reset needed: Click "**Forgot password?**" → follow the email link your developer sends.
 - o 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:**
 - o Never share credentials.
 - o Use a password manager.
 - o 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.



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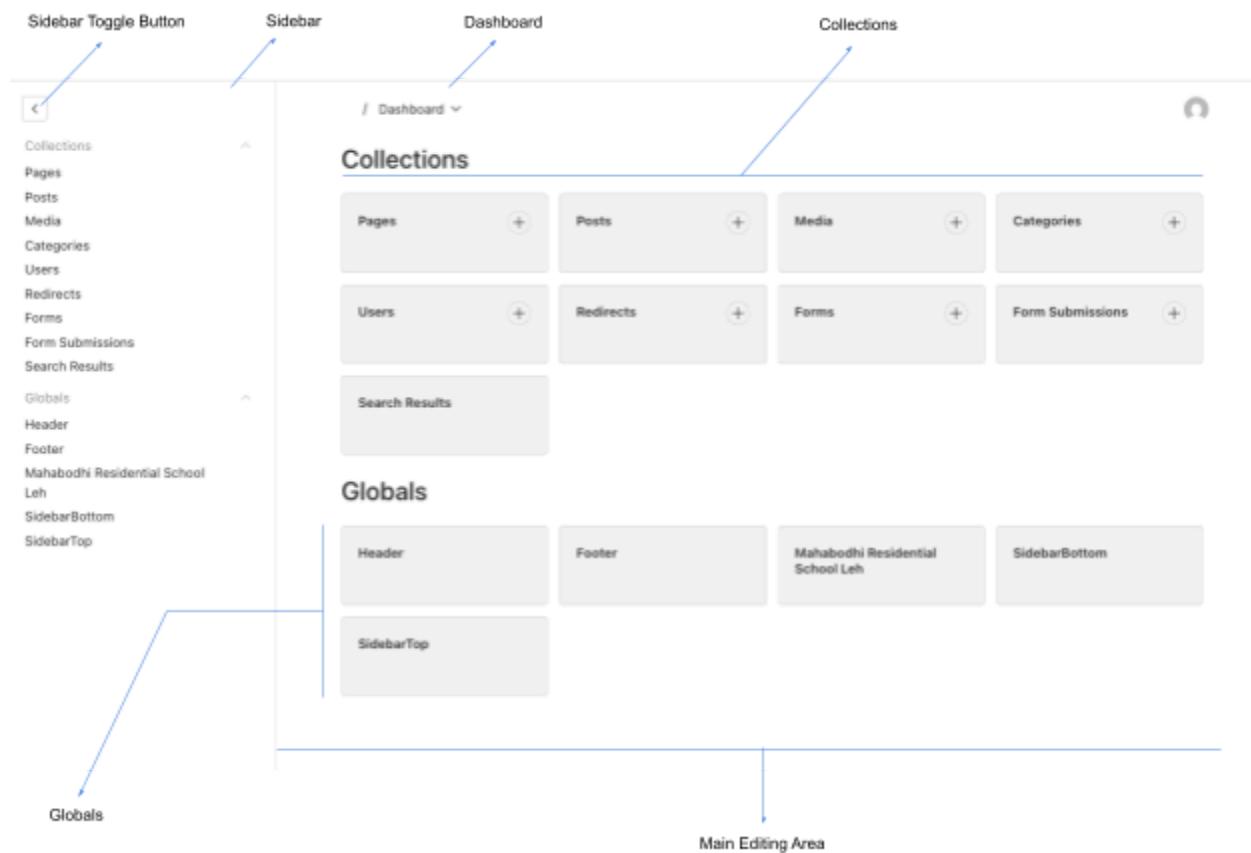
Understanding the Dashboard & Navigation

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 management screen. On the left, a sidebar lists various collections: Collections, Pages, Bulletin Board, Media, Categories, Users, Redirects, Forms, Form Submissions, Search Results, Global, Header, Footer, Mahabodhi Residential School Leh, SidebarBottom, and SidebarTop. The 'Pages' collection is currently selected. The main area is titled 'Pages' with a 'Create New' button. It features a search bar labeled 'Search by Title' and buttons for 'Columns' and 'Filters'. Below the search bar is a table with columns for 'Title', 'Slug', and 'Updated At'. The table contains ten entries, each with a checkbox and a link to the page's details. The entries are: 'Contact Us' (slug: contact-us, updated: January 29th 2026, 12:15 PM), 'Photo Gallery' (slug: photo-gallery, updated: January 29th 2026, 12:15 PM), 'Quick tour of the School' (slug: quick-tour-school, updated: January 29th 2026, 12:15 PM), 'Self Certification By The School' (slug: academics, updated: January 29th 2026, 12:15 PM), 'Mandatory Disclosure' (slug: mandatory-disclosure, updated: January 29th 2026, 12:15 PM), 'Withdrawal Policy' (slug: withdrawal-policy, updated: January 29th 2026, 12:15 PM), 'Admission Form' (slug: admission-form, updated: January 29th 2026, 12:15 PM), 'Fee Structure' (slug: fee-structure, updated: January 29th 2026, 12:15 PM), 'Admission Procedure' (slug: admission-procedure, updated: January 29th 2026, 12:15 PM), and 'Admissions' (slug: admissions, updated: January 29th 2026, 12:15 PM). At the bottom of the table, there are navigation arrows and a page number indicator showing '1-10 of 36'. To the right of the page number, there is a 'Per Page' dropdown set to '10'.

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

Len

SidebarBottom

SidebarTop

/ Pages / About Us

About Us

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

Edit API

Title *

Type *

Published At

Slug Unlock

Parent

Hero Content SEO

Slides

Breadcrumbs

URL	Label
/about	About

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 shows the 'Header' global configuration screen. On the left, a sidebar lists various collections and globals, including 'Header' under 'Globals'. The main area is titled 'Header' and contains a 'Nav Items' section. A 'Link' card is expanded, showing settings for 'Internal link' (selected), 'Custom URL' (unchecked), 'Open in-new tab' (unchecked), 'Document to link to' (set to 'Home'), and 'Label' (set to 'Home'). Below this is a 'Sub Links' section with a button to 'Add Sub Link'. A list of 8 navigation items follows, each with a collapse/expand icon: 'Nav Item 1: Home', 'Nav Item 2: About', 'Nav Item 3: Academics', 'Nav Item 4: Facilities', 'Nav Item 5: Admissions', 'Nav Item 6: Mandatory Disclosure', 'Nav Item 7: Photo Gallery', and 'Nav Item 8: Contact Us'. At the bottom is a button to 'Add Nav Item'. The top right features 'Edit' and 'API' buttons, and the bottom right has 'Save' and other UI elements.

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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.

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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.

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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** (\mathcal{B} /Ctrl + B) — strong emphasis.
- **Italic** (\mathcal{I} /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