AI WEBSITE MANAGER

Quick Reference Guide

Updated: October 2026

Introduction

The AI Website Manager Quick Reference Guide is designed to instruct staff members how to leave comments for Tebra's design team (when applicable) and how to make common edits after the practice's website goes live.

You will learn how to manage providers, update the practice website, undo a change, how to publish the changes and more.

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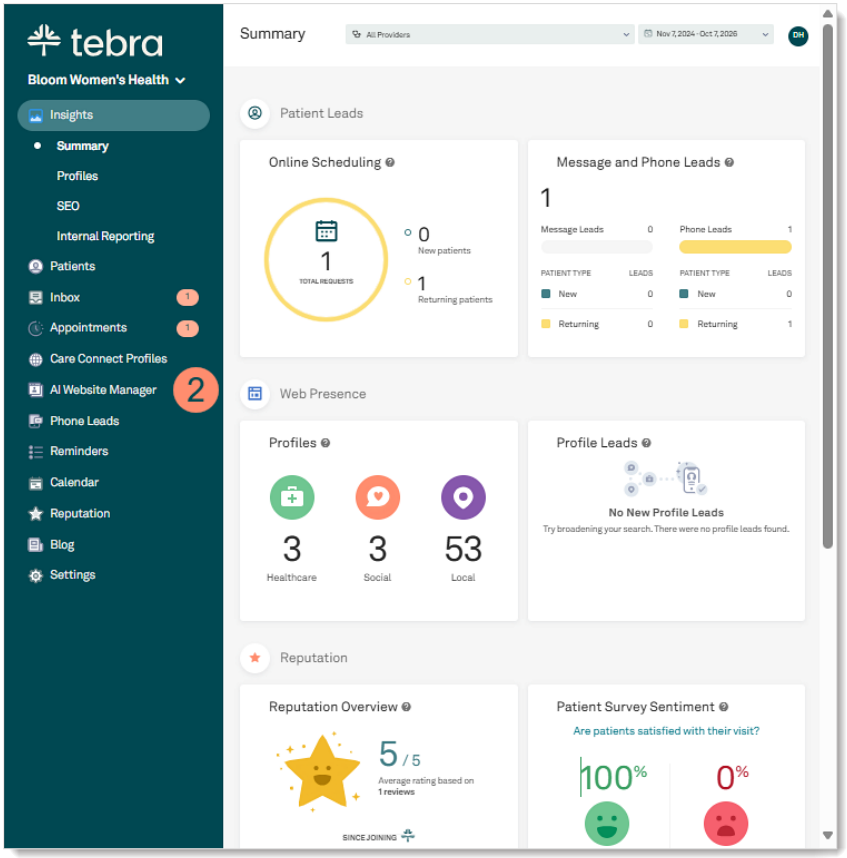
Access AI Website Manager

Log into the applicable web platform (Practice Growth or Practice Operations) to access your AI Website Manager.

Practice Growth

For Practice Growth subscribers, follow the steps below to access AI Website Manager.

1. Log into app.patientpop.com. Review the Log into Tebra help article to learn more.
2. Click **AI Website Manager**. The *AI Website Manager* opens in a new browser tab.



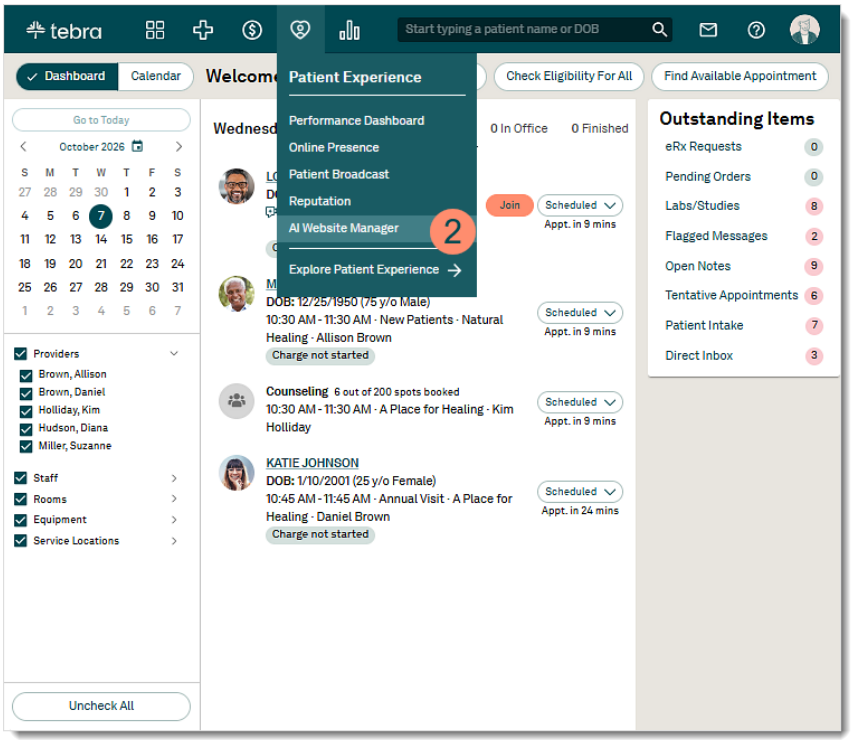
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Practice Operations

For Practice Experience subscribers, follow the steps below to access AI Website Manager.

1. Log into app.kareo.com. Review the Log into Tebra help article to learn more
2. Click **AI Website Manager**. The *AI Website Manager* opens in a new browser tab.

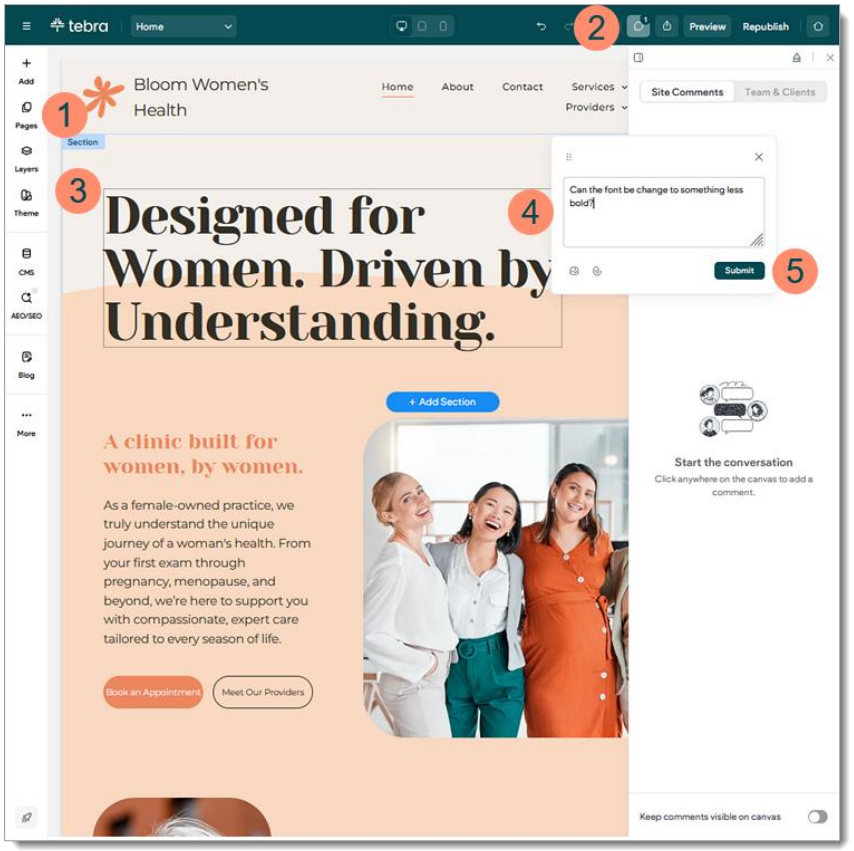


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Leave Site Comments

Site Comments is a collaboration tool that lets you communicate directly with Tebra during onboarding. While your website is under construction, you will have read-only access to preview the design and leave comments on specific elements to share feedback.

1. If applicable, click **Pages** and select the relevant *Page* to leave a comment.
2. Click the **Comment** icon. The *Website Comment* panel opens.
3. Click on an **element**. The *comment* pop-up window opens.
4. Enter the feedback in the field.
    - To add a reference photo, click the **image** icon. Then, upload the photo.
    - To add a reference file, click the **paperclip** icon. Then, upload the file.
5. Click **Submit** when finished.
6. The design team can review the feedback, request additional information, or resolve the issue as applicable.

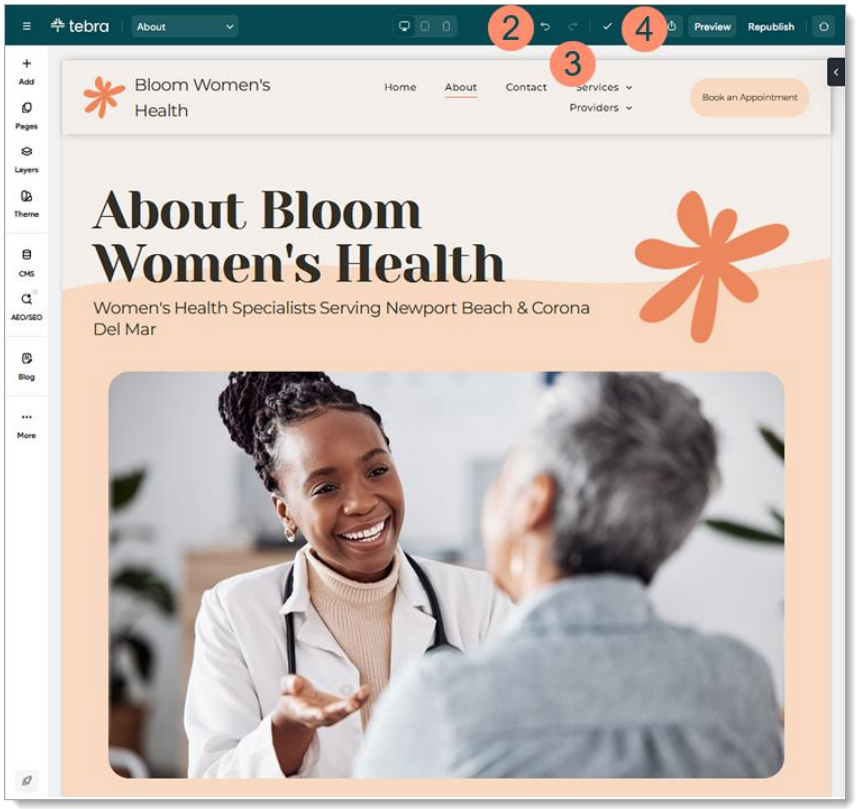


Undo or Redo Change

After the practice website is live, staff members can edit the website. While editing, the backward and forward icons will automatically activate whenever changes occur. Use undo (backward icon) to revert the page or individual elements to a previous state, and redo (forward icon) to reapply reversed edits.

⚠ Important Note: Undo and redo options are only available for the current page during an active editing session. Review all changes before navigating to a different page as switching pages will clear the edit history.

1. Make applicable changes to the website.
2. To revert the page or individual elements to a previous state, click the **Undo** icon.
    - If the icon is disabled, the previous state cannot be reverted.
3. To reapply reversed edits, click the **Redo** icon.
    - If the icon is disabled, the reversed edit cannot be applied.
4. The check mark icon indicates changes have been successfully saved.



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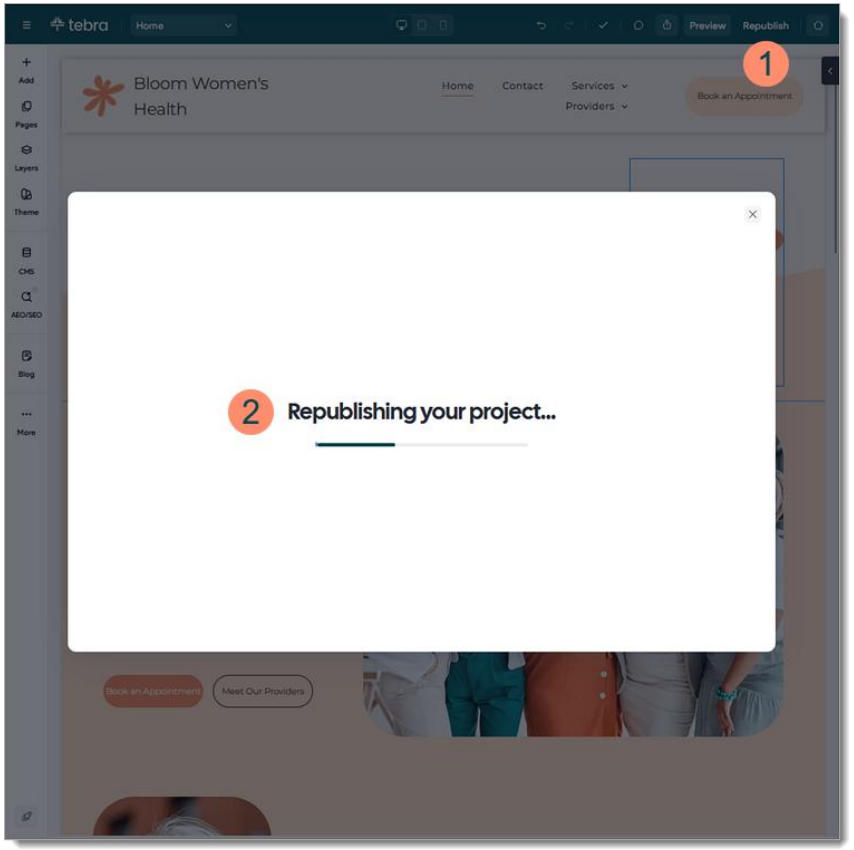
Publish Changes

Changes made within AI Website Manager will not be displayed on the live website until the changes are published. Publishing can be applied website-wide or restricted to specific pages, keeping unapproved edits or ongoing drafts hidden from public view.

Publish Website

Publishing the full website pushes all pending updates, new pages, and layout changes live at once.

1. Click **Republish** in the navigation bar.
2. The progress pop-up window opens.
3. A confirmation pop-up window opens when the site has been successfully published.

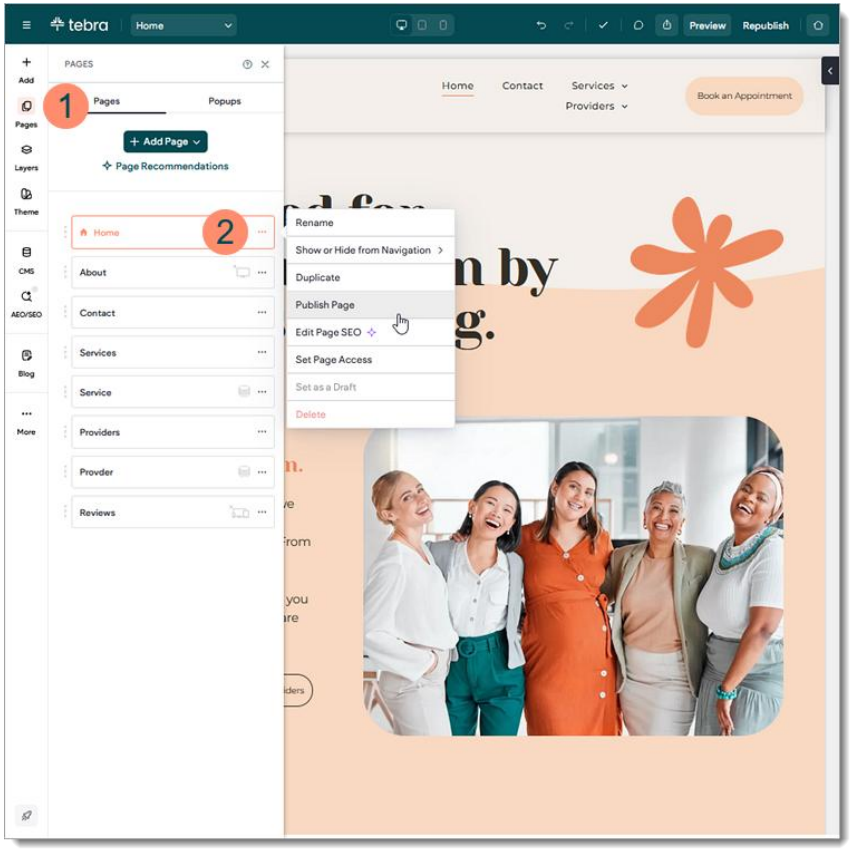


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Publish Individual Page

Publishing individual pages pushes selected updates live without republishing the entire website. This allows finished pages to go live while incomplete edits on other pages stay hidden as drafts.

1. Click **Pages**. The *Pages* panel opens.
2. Click the **more option** icon and select *Publish page* next to the applicable page. The *Publish Page* pop-up window opens.
3. Click **Yes** to confirm publishing the page. A progress bar display.
4. A confirmation message displays when the page has successfully published.



Providers

Managing provider pages helps maintain accurate staff information on the practice's website. Staff members have the option to add, hide, or delete a provider. It is recommended that a provider is hidden when they are no longer at the practice to save historical data. Deleting the provider will permanently remove the provider page and all data populated in the row.

⚠ Important Note: Changes made to providers in the AI Website Manager will not be reflected in the applicable web platform (Practice Growth or Practice Operations).

Add Provider

Before adding a provider to the website, add the provider in the applicable web platform.

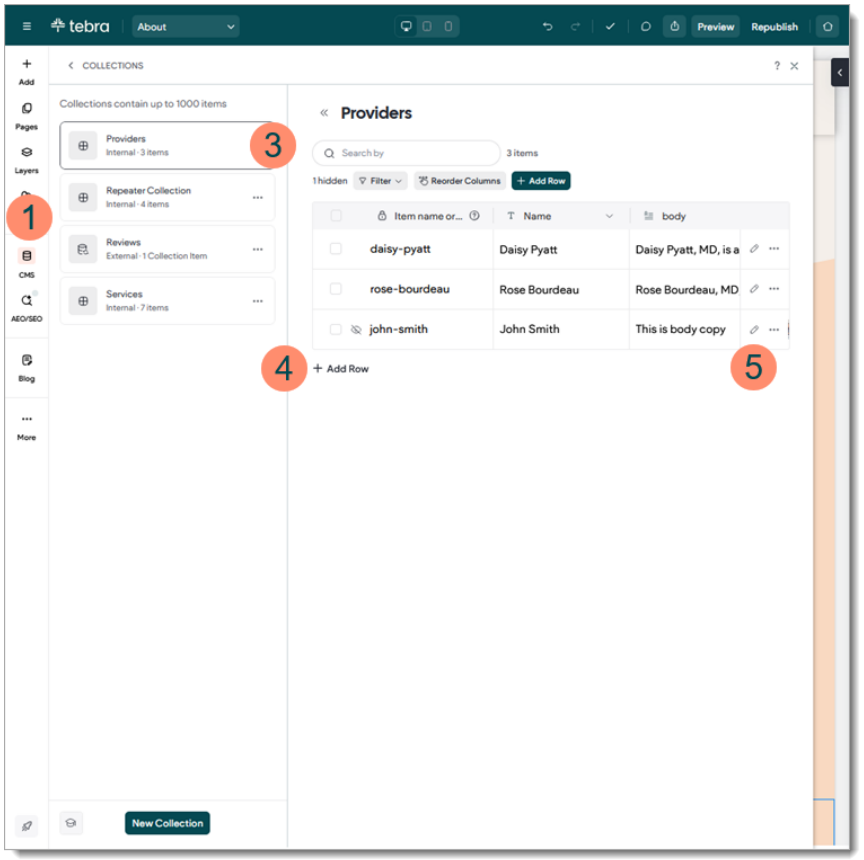
- *Practice Growth:* Contact Customer Care for assistance.
- *Practice Operation:* System administrators can add a new provider when they join the practice. Then, configure their office hours and provider profile. Review the following help articles:
  - Add New Provider – Learn how to create a provider account.
  - Manage Office Hours – Learn how to configure the provider's office hours.
  - Provider Profile – Learn how to configure the provider profile and to enable online scheduling

Once a provider is added to the AI Website Manager, a dynamic provider page is automatically created and the information entered will be populated throughout the website as applicable.

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Add Provider, cont.

1. Click **CMS**. The *Content Management* panel opens.
2. Click **Collections**. The *Collections* panel opens.
3. Click **Providers**. The *Provider* panel opens.
4. Click **+ Add Row**. The new provider row populates.
5. Click the **pencil** icon to edit the provider. The provider pop-up window opens.

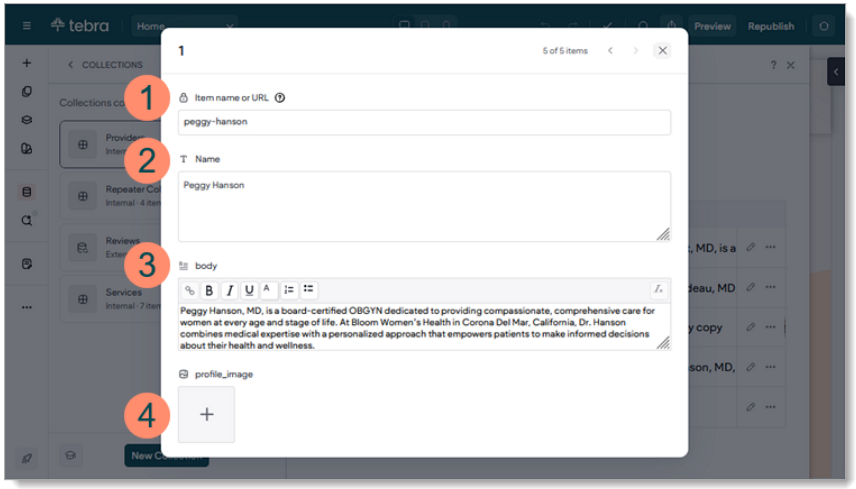


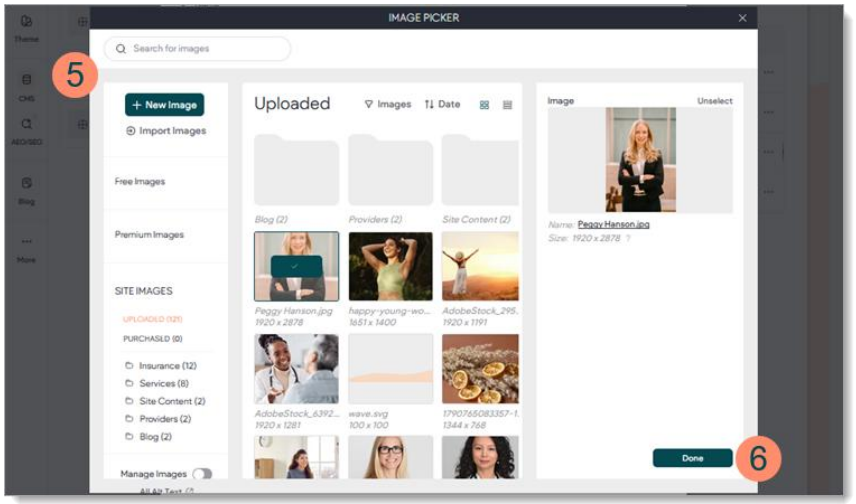
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Add Provider, cont.

1. **Item name or URL:** Enter the provider's name with a hyphen (-) as separators between the first and last name to create a unique URL. For example, entered as peggy-hanson for provider Peggy Hanson.
2. **Name:** Enter the provider's name.
3. **Body:** Optionally, enter the provider's biography or additional information about the provider.
4. **Profile Image:** Optionally, click the **+** icon to add a profile image. The *Image Picker* pop-up window opens.
5. **Image Picker:** Select an existing provider image or click **+ New Image** to upload a new image up to 200MB in size and in the format of GIF, JPG, JPEG, PNG, or WEBP.
6. Click **Done** when finished to return to the previous window.

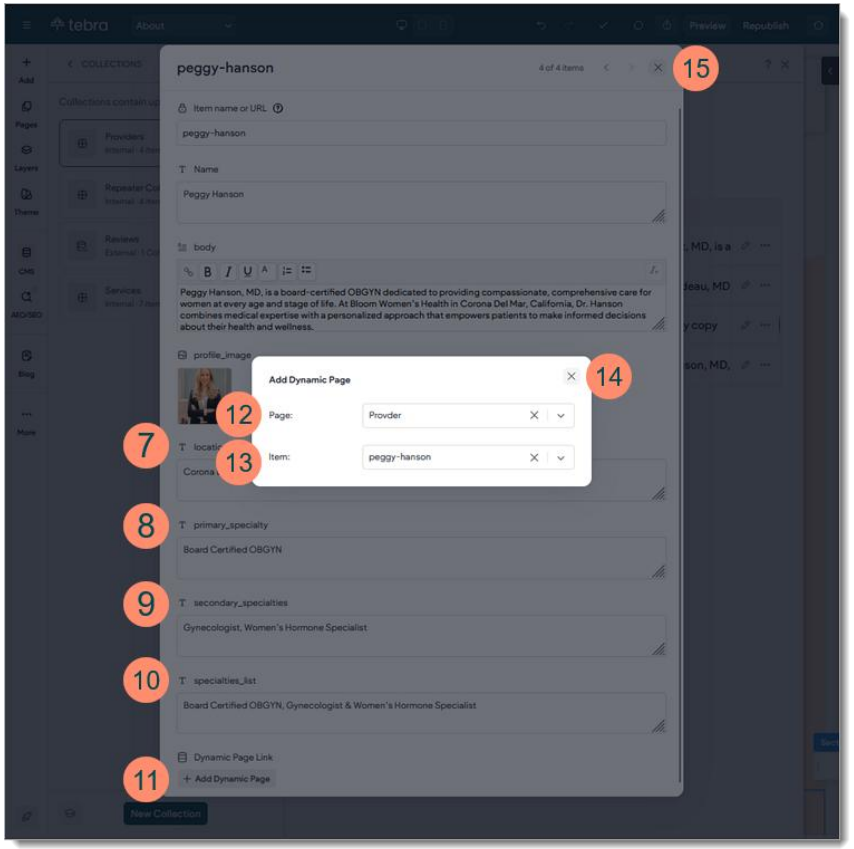




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Add Provider, cont.

7. **Location List:** Enter the where (city and state) where the provider practices.
8. **Primary Specialty:** Enter the provider's primary specialty.
9. **Secondary Specialties:** Optionally, enter the provider's secondary specialties.
10. **Specialists List:** Optionally, enter the provider's list of specialties.
11. **Add Dynamic Page:** Click **+ Add Dynamic Page** to link the provider to a dynamic page for the entered information to populate throughout the website as applicable. The *Add Dynamic Page* pop-up window opens.
12. **Page:** Click the **drop-down** and select *Provider*.
13. **Item:** Click the **drop-down** and select the provider's name.
14. Click **X** to close and save the dynamic page.
15. Click **X** to close the save the new provider. The provider and provider page is created.
16. Publish changes as applicable.



Hide Provider

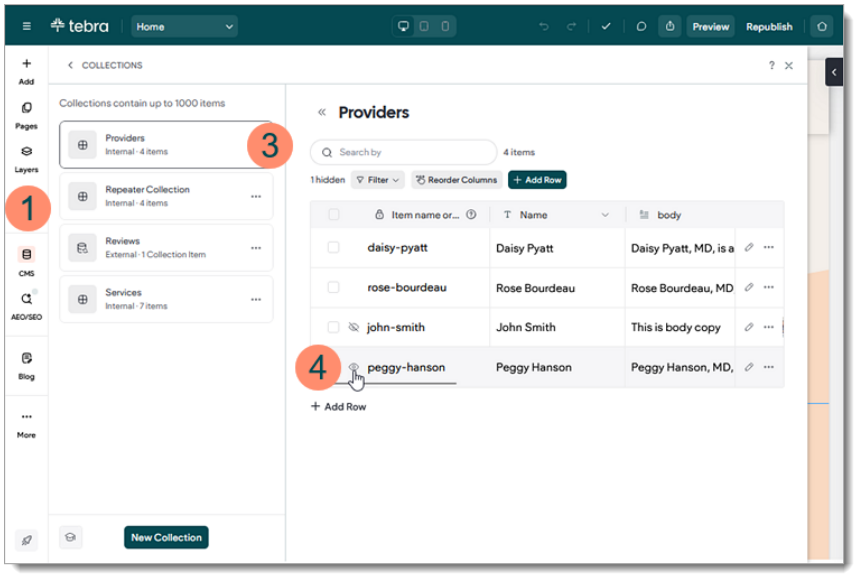
Hiding a provider who is inactive or no longer with the practice preserves stored historical data while removing the profile from public view. Hidden providers can be unhidden at any time.

If applicable, deactivate the provider in the applicable web platform.

- *Practice Growth:* Contact Customer Care for assistance.
- *Practice Operation:* Review the Deactivate Provider Account help article to learn more.

1. Click **CMS**. The *Content Management* panel opens.
2. Click **Collections**. The *Collections* panel opens.
3. Click **Providers**. The *Provider* panel opens.
4. Click the **visibility** icon next to the applicable provider.

   The visibility off icon now displays and the provider is hidden in all applicable areas of the website.
5. Publish changes as applicable.



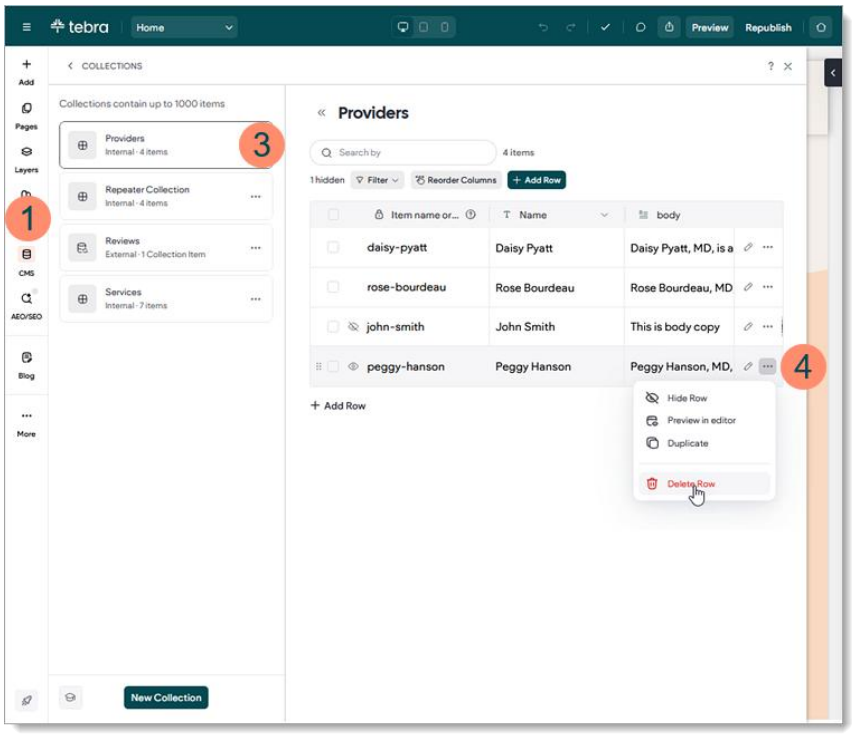
Delete Provider

Deleting the provider will permanently remove the provider page and all data populated in the row. It is recommended that providers are hidden to save historical data instead of deleting.

If applicable, deactivate the provider in the applicable web platform.

- *Practice Growth:* Contact Customer Care for assistance.
- *Practice Operation:* Review the Deactivate Provider Account help article to learn more.

1. Click **CMS**. The *Content Management* panel opens.
2. Click **Collections**. The *Collections* panel opens.
3. Click **Providers**. The *Provider* panel opens.
4. Click the **more option** icon and select *Delete Row*. The *Delete Row* pop-up opens.
5. Click **Yes** to confirm. The provider is deleted and the provider page is removed from the website.
6. Publish changes as applicable.



Locations

Managing locations keeps practice addresses accurate on the practice's website. Displaying location details the website helps patients choose the right clinic for them to book appointments.

⚠ Important Note: Changes made to locations in the AI Website Manager will not be reflected in the applicable web platform (Practice Growth or Practice Operations).

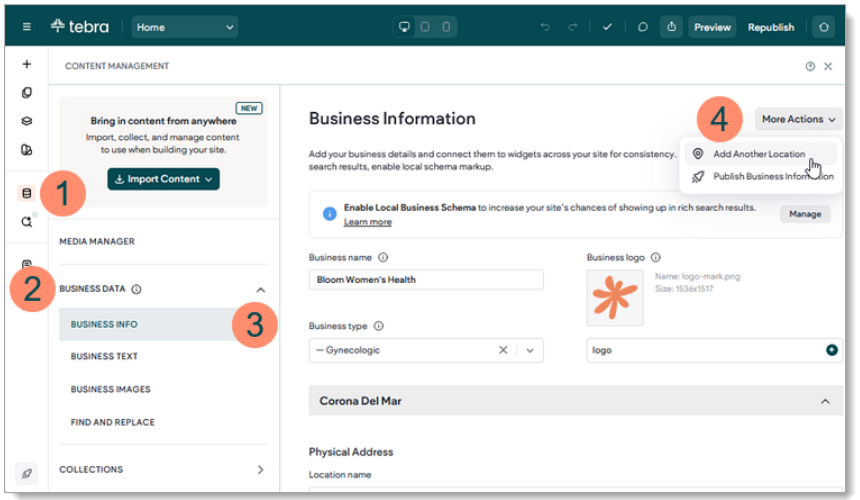
Add Location

Add a new location where providers render medical services to patients.

Before adding a location to the website, add the provider in the applicable web platform.

- *Practice Growth:* Contact Customer Care for assistance.
- *Practice Operation:* Review the Add or Edit Service Locations help article to learn more.

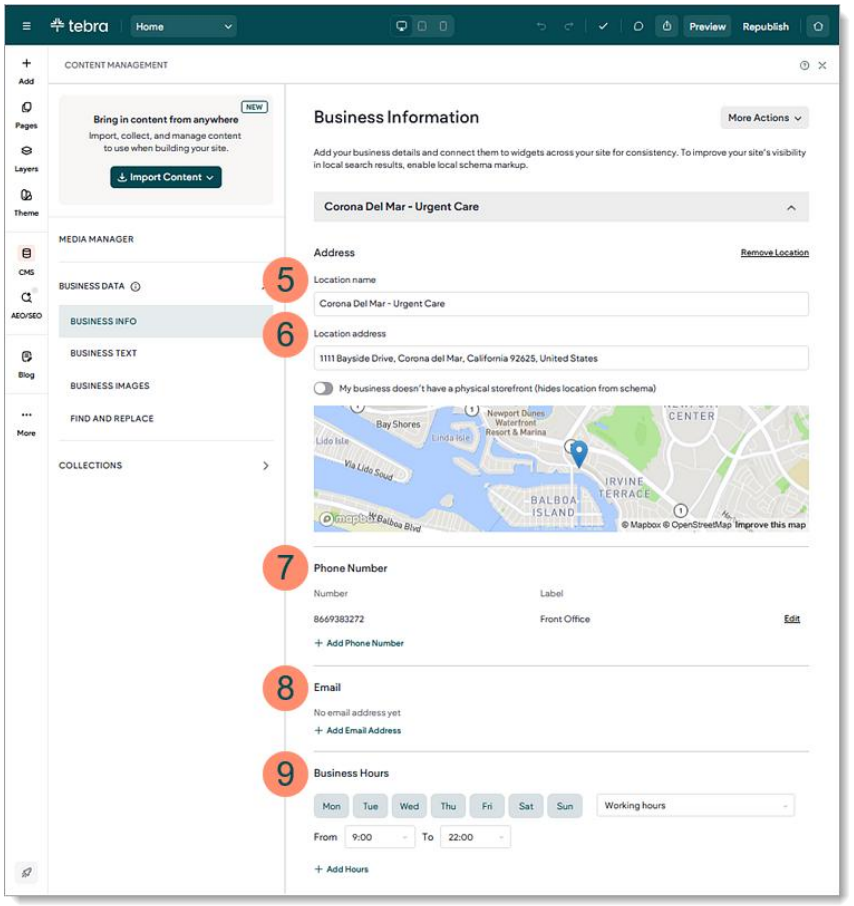
1. Click **CMS**. The *Content Management* panel opens.
2. Click **Business Data**. Additional options displays.
3. Click **Business Info**. The *Business Information* page opens.
4. Click the **More Options** drop-down and select *Add Another Location*. A new location displays under the existing location. Scroll down to the new location to make edits.



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Add Location, cont.

5. **Location Name:** By default, the new location name is set to New York, NY. Update the name of the practice's location.
6. **Location Address:** By default, the new location name is set to New York, NY. Update the practice's location.
7. **Phone Number:** Click **+ Add Phone Number**. The editor opens to add a *Number* and *Label*. Then, click **Save**.
    - To remove a phone number, click **Edit**. Then, click the **X** icon.
8. **Email:** Click **+ Add Email Address**. The editor opens to add an *Email* and *Label*. Then, click **Save**.
    - To remove an email, click **Edit**. Then, click the **X** icon.
9. **Business Hours:** Click **+ Add Hours**. By default, working hours Monday – Friday from 9AM – 5PM is added. Edit the day and hours, as applicable.
    - To remove an office hour, hover over the hours and click the **X** icon.
10. Publish changes as applicable.



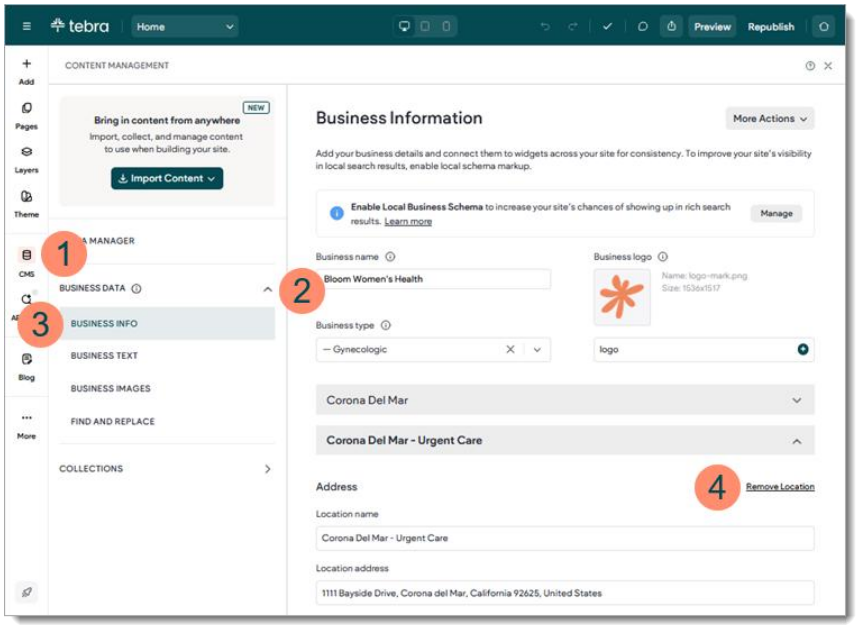
Remove Location

Remove a location when it is no longer applicable.

If applicable, update the location in the applicable web platform.

- *Practice Growth:* Contact Customer Care for assistance.
- *Practice Operation:* Remove the location from the provider's office hours and online provider profiles as necessary. Review the following help articles:
  - Manage Office Hours – Learn how to configure the provider's office hours.
  - Provider Profile – Learn how to configure the provider profile and to enable online scheduling

1. Click **CMS**. The *Content Management* panel opens.
2. Click **Business Data**. Additional options displays.
3. Click **Business Info**. The *Business Information* page opens.
4. Scroll down to the applicable location and click **Remove Location**. The *Remove Location* pop-up window opens.
5. Click **Remove Location** to confirm.
6. Publish changes as applicable.



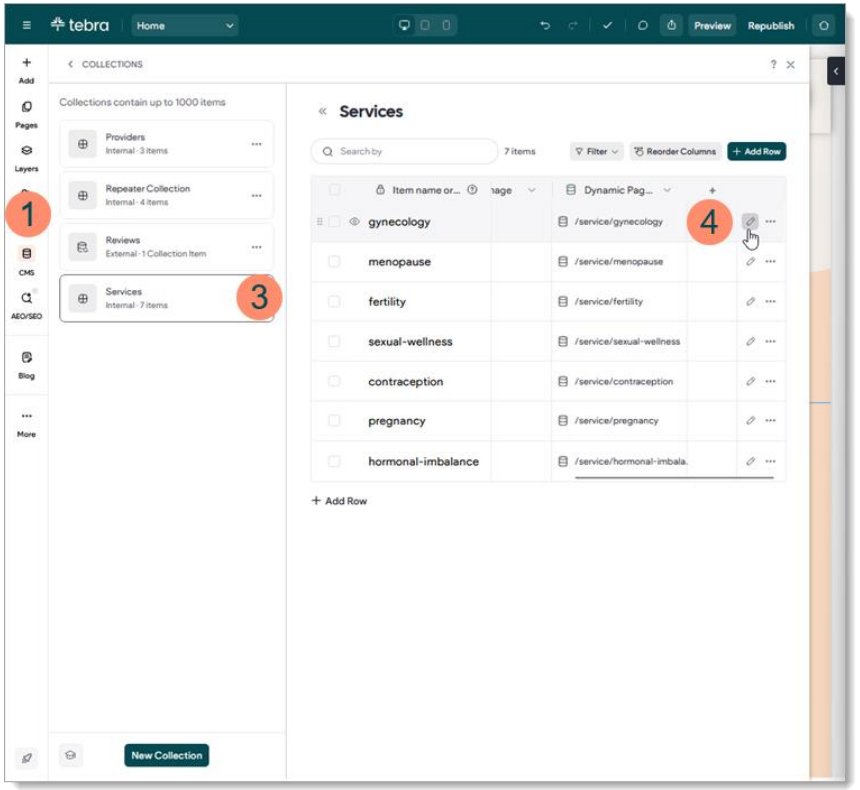
Collections

Collections (e.g., Provider and Services) can be managed from the CMS tab or directly on individual pages. Both editing methods instantly update the content across all corresponding website locations to maintain accuracy and visual consistency.

Edit Collection Item: CMS

Manage items from the CMS tab to simultaneously review, edit, and update items across the entire collection.

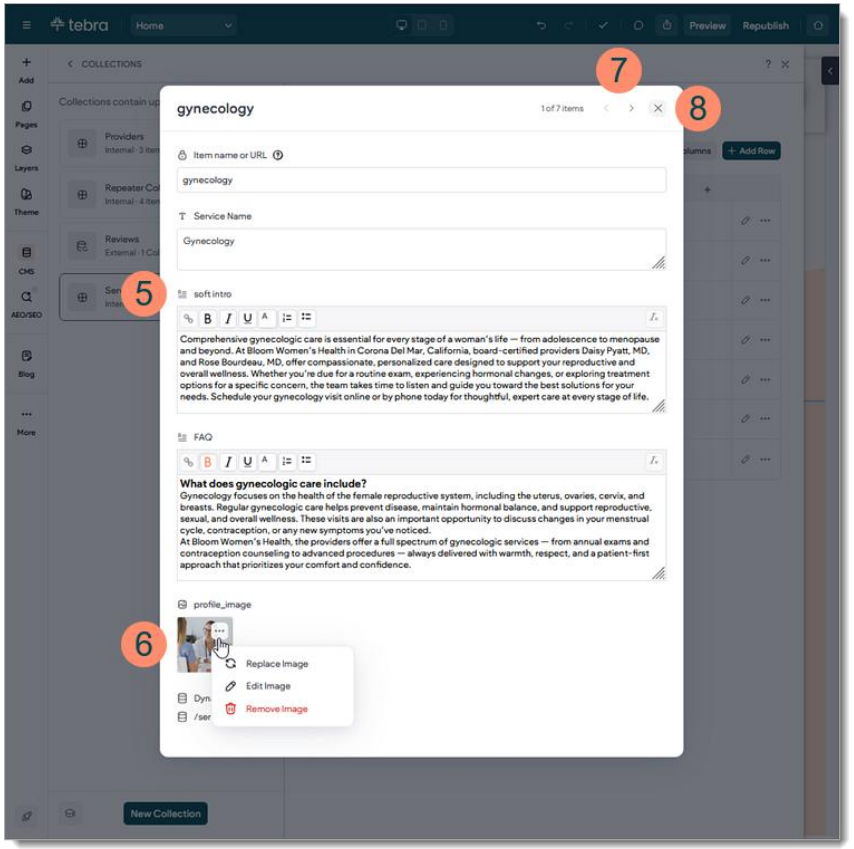
1. Click **CMS**. The *Content Management* panel opens.
2. Click **Collections**. The *Collections* panel opens.
3. Click on a **collection** (e.g., Services). The collection panel opens.
4. Click the **pencil** icon to edit an item. The edit item pop-up window opens.



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Edit Collection Item: CMS, cont.

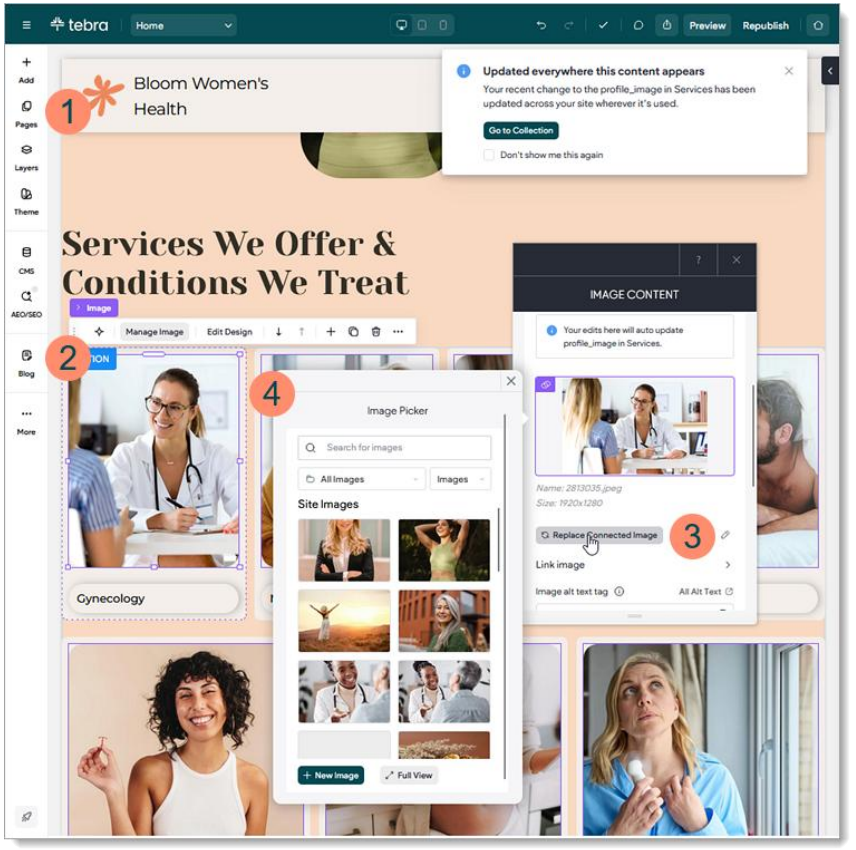
5. **Text Fields:** Make edits to the applicable text fields.
6. **Profile Image:** Hover over the image to click the **more option** icon and select *Replace Image*, *Edit Image*, or *Remove Image*.
    - *Replace Image:* Click to open the *Image Picker* pop-up window. Select an existing image or click **+ New Image** to upload a new image up to 200MB in size and in the format of GIF, JPG, JPEG, PNG, or WEBP. Click **Done** when finished.
    - *Edit Image:* Click to open the *Image Editor* pop-up window. Use the settings to edit the existing image. Click **Save** when finished.
    - *Remove Image:* Click to remove the image.
7. Click the **backward** or **forward** icon to edit the next item in the collection.
8. Click the **X** icon when finished.
9. Publish changes as applicable.



Edit Collection Item: Directly

Collection items can be edited directly on the page instead of through the CMS tab. Collection-connected images and text display a purple outline when hovered over in the editor.

1. If applicable, click **Pages** and select the relevant *Page.*
2. Double-click on the **image** on a page. The *Image Content* pop-up window opens.
3. Click **Replace Connected Image**. The *Image Picker* pop-up window opens.
4. Select an existing image or click **+ New Image** to upload a new image up to 200MB in size and in the format of GIF, JPG, JPEG, PNG, or WEBP. A message displays when the image is updated.
5. For text fields, double-click on the **text** to update the existing text on the page. The text on the page and collection is updated.
6. Publish changes as applicable.



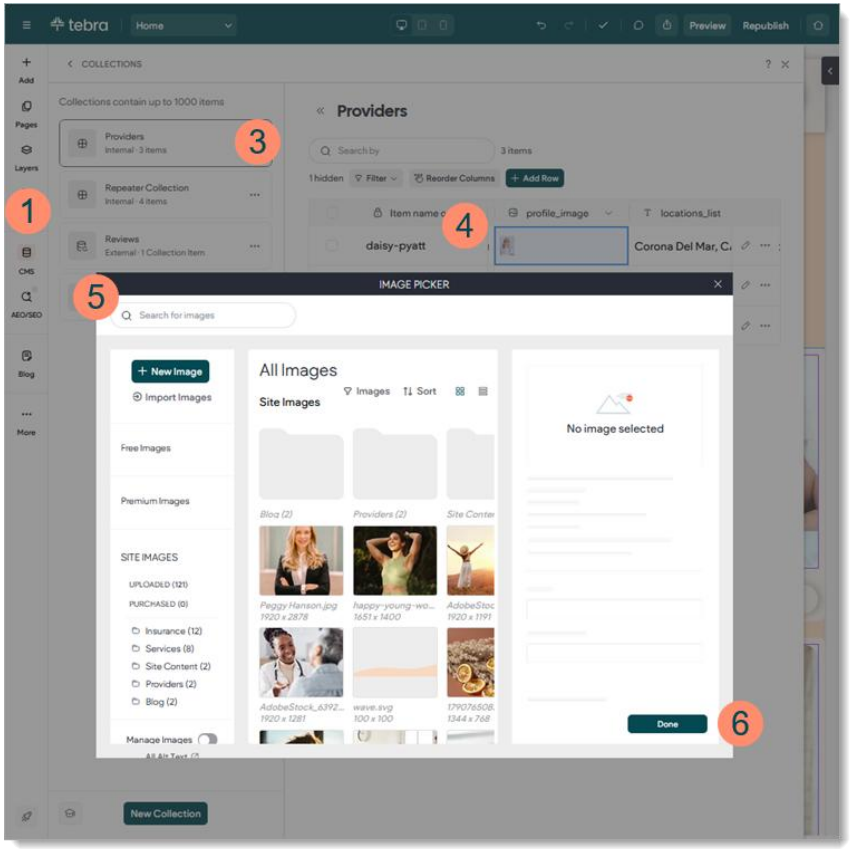
Update Images

Replace existing images connected to a collection or page specific images that are not a part of a collection.

Replace Image: Collection

Change an existing image connected to a collection to instantly update the image across all corresponding website locations.

1. Click **CMS**. The *Content Management* panel opens.
2. Click **Collections**. The *Collections* panel opens.
3. Click on a **collection** (e.g., Provider). The collection panel opens.
4. Scroll to the *Profile Image* column and double-click on the image. The *Image Picker* pop-up window opens.
5. Select an existing image or click **+ New Image** to upload a new image up to 200MB in size and in the format of GIF, JPG, JPEG, PNG, or WEBP.
6. Click **Done** when finished. The image is updated in all corresponding website locations.
7. Publish changes as applicable.

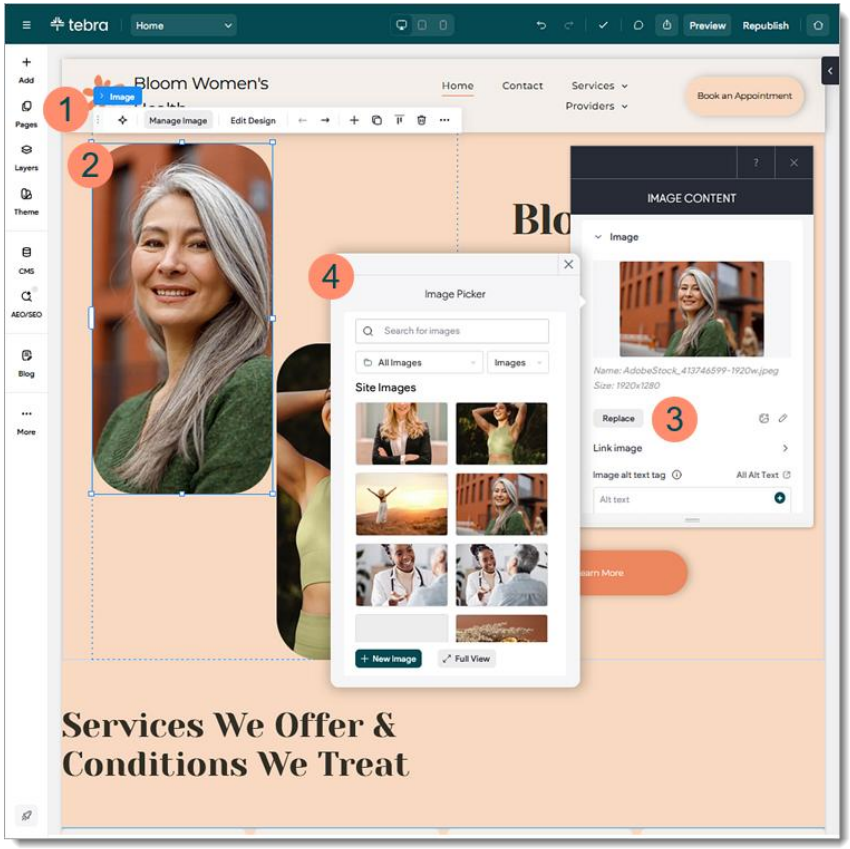


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Replace Image: Page Specific

Replace a standalone hero or section image on a specific page. Since these images are not connected to a collection, changing an image on one page will not update matching images used elsewhere on the website.

1. If applicable, click **Pages** and select the relevant *Page.*
2. Double-click on the **image** on a page. The *Image Content* pop-up window opens.
3. Click **Replace**. The *Image Picker* pop-up window opens.
4. Select an existing image or click **+ New Image** to upload a new image up to 200MB in size and in the format of GIF, JPG, JPEG, PNG, or WEBP. The image is replaced on the page.
5. Publish changes as applicable.



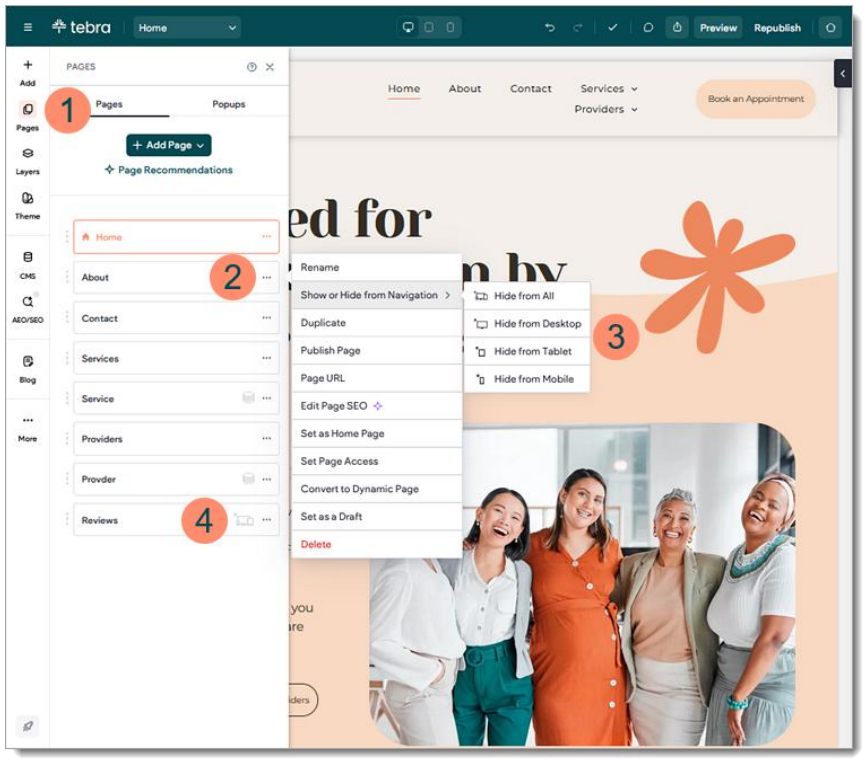
Page Visibility

Managing page visibility controls public access to website content without losing saved work. When a page is no longer needed, hiding is recommended over deletion to preserve historical data, analytics, and page design for future reference. If the page content becomes relevant again later, the page can be restored to public view at any time.

Hide Page

Hiding a web page removes it from website navigation and search engines without permanently deleting its content.

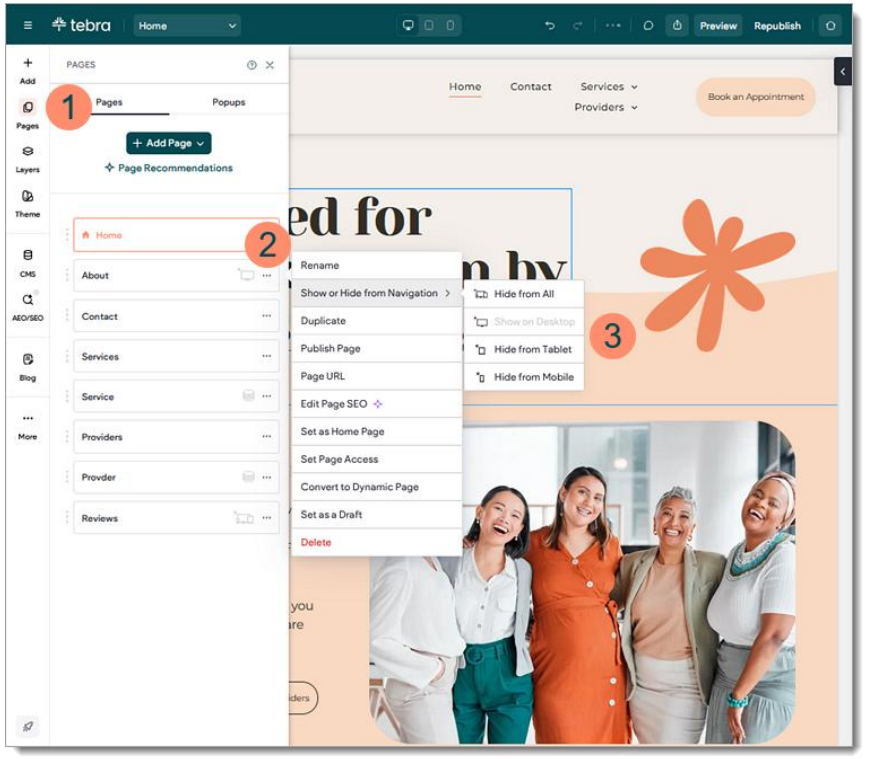
1. Click **Pages**. The *Pages* panel opens.
2. Click the **more option** icon and select *Show or Hide from Navigation* next to the page. Additional options display.
3. Select when the page is hidden:
    - *Hide from All:* Click to hide the page for everyone.
    - *Hide from Desktop:* Click to hide the page from users viewing the page on a desktop.
    - *Hide from Tablet:* Click to hide the page from users viewing the page on a tablet (e.g., iPad).
    - *Hide from Mobile:* Click to hide the page from users viewing the page on a mobile device (e.g., iPhone).
4. An icon displays to show which screen size is hidden.
5. Publish changes as applicable.



Show Page

When applicable, restore the hidden page to show on the website navigation again.

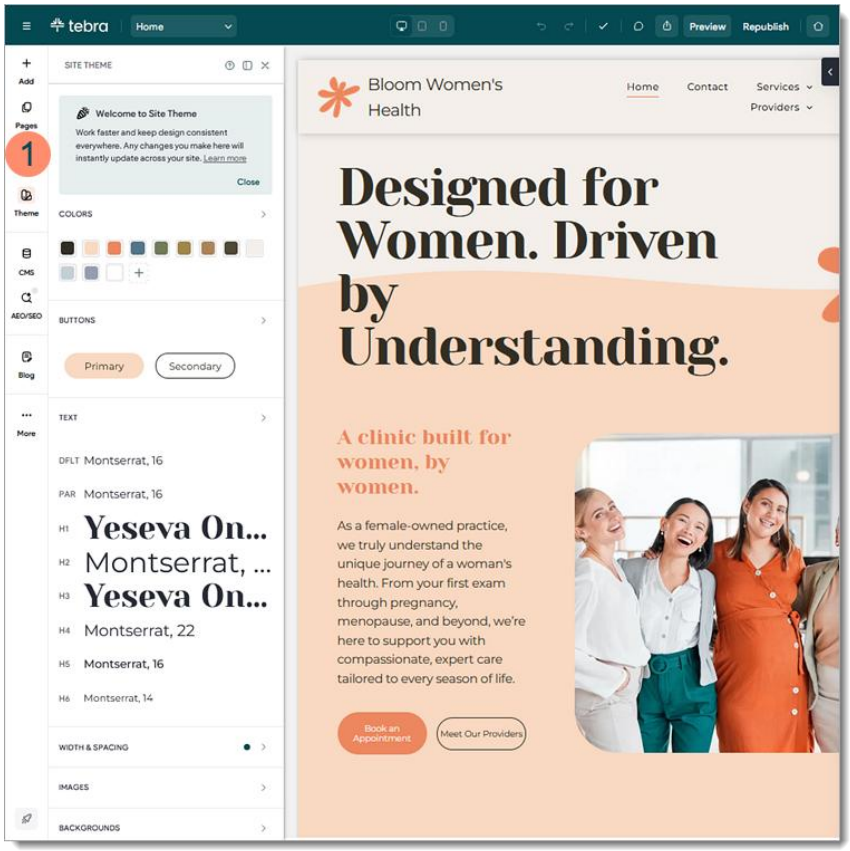
1. Click **Pages**. The *Pages* panel opens.
2. Click the **more option** icon and select *Show or Hide from Navigation* next to the applicable page. Additional options display.
3. Select the applicable option:
   - *Show on All:* Click to show the page to everyone.
   - *Show on Desktop:* Click to show the page to users viewing the page on a desktop.
   - *Show on Tablet:* Click to show the page to users viewing the page on a tablet (e.g., iPad).
   - *Show on Mobile:* Click to show the page to users viewing the page on a mobile device (e.g., iPhone).
4. Publish changes as applicable.



Update Website Theme

Managing theme settings controls the global appearance of a website, including color palettes, button styles, and font. Updating these settings instantly changes all corresponding elements using the original colors, fonts, or button styles across the entire site for consistency.

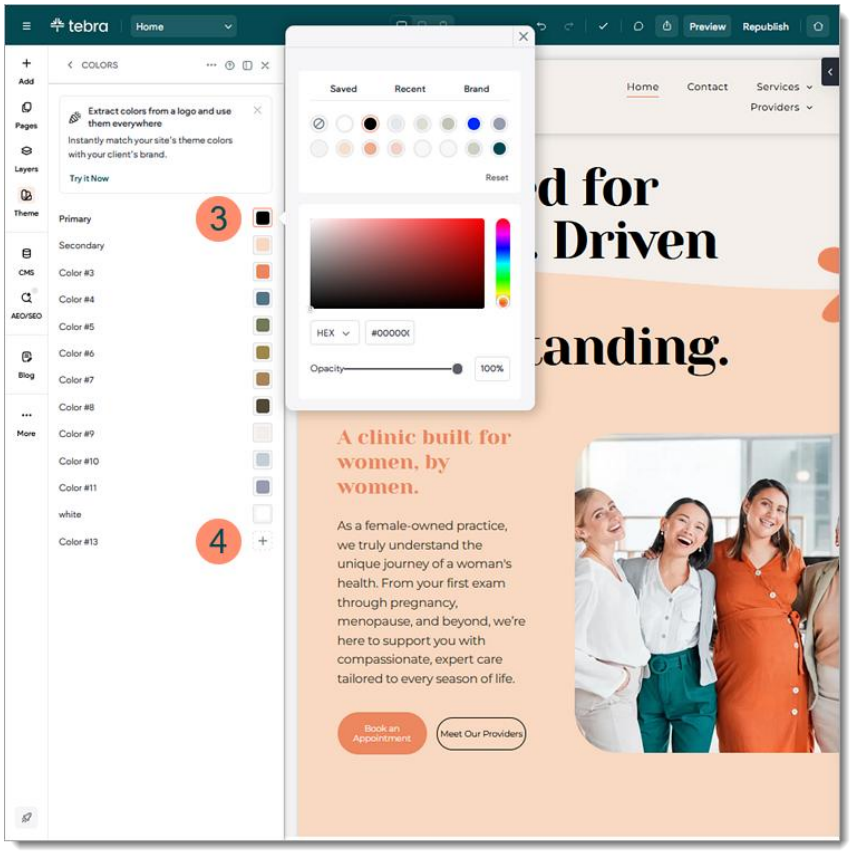
1. Click **Theme**. The *Site Theme* panel opens.



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Update Website Theme, cont.

2. To update colors, click the **right arrow** icon of the *Colors* section. The *Colors* panel opens.
3. To update an existing color, click the **color**. The color picker opens.
    a. Select an existing color or specify a color using HEX (e.g., #004952) or RGB (e.g., 0, 73, 82). The corresponding elements update to the selected color.
4. To add a new color, click the **+** icon. The color picker opens.
    a. Select an existing color or specify a color using HEX (e.g., #004952) or RGB (e.g., 0, 73, 82). The new color is added and is now available for selection in the editor.
    b. To change the name of the new color, hover over the name and click the **edit** icon. Enter the new name in the editor.

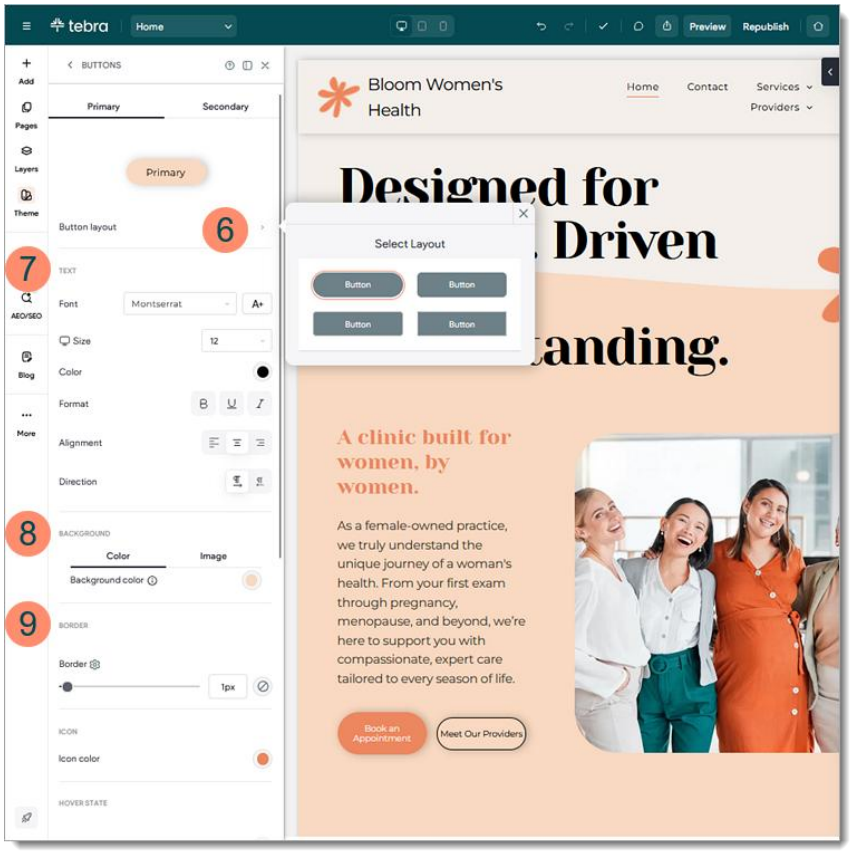


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Update Website Theme, cont.

5. To update buttons, click the **right arrow** icon of the *Buttons* section. The *Primary Buttons* panel opens.
6. To change the shape of the button, click the *Button Layout* **right arrow** icon. Then, select a new button shape.
7. To change the *Text* of the button, select a new *Font*, *Size*, *Format*, *Alignment*, or text *Direction*. Click the **color** to open the color picker to update the color.

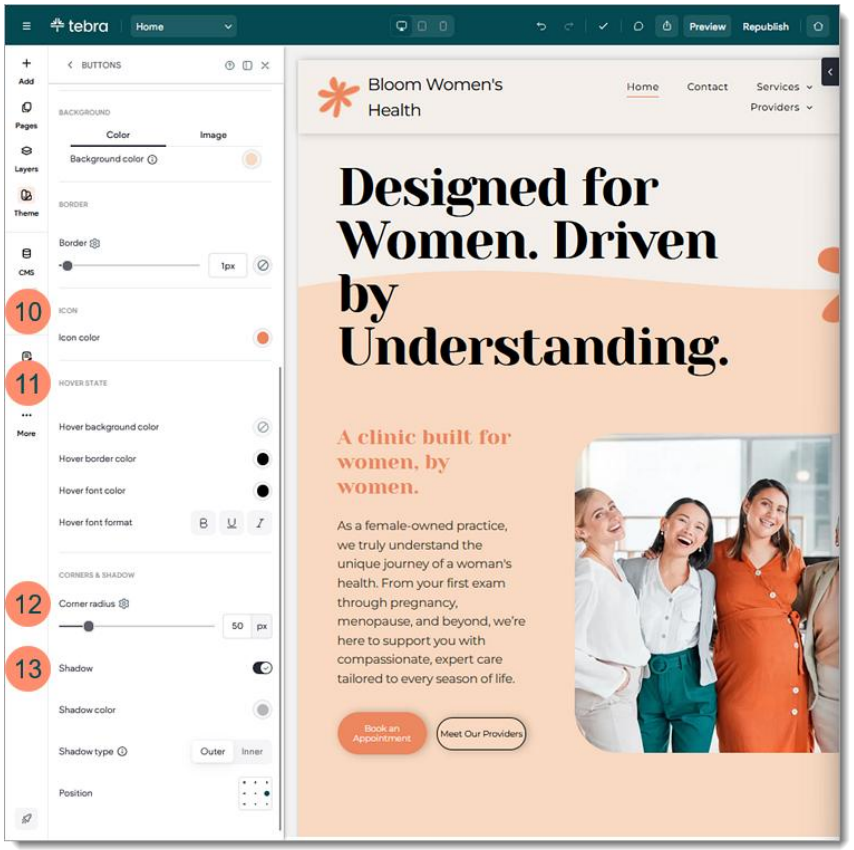
   Tip: Click **A+** to select a *Google Font* or upload a *Custom Font*.
8. To change the *Background*, click the **color** to update the *Background Color* using the color picker or click the *Image* tab to add an existing image or upload a new image up to 200MB in size and in the format of GIF, JPG, JPEG, PNG, or WEBP.
9. To change the *Border,* click the **settings** icon to select the side, click on the slider to change the border thickness, or click the **color** to change the border color.



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Update Website Theme, cont.

10. To change the *Icon* color, click the **color** to open the color picker.
11. To change the button's *Hover State*, select a *Background Color*, *Border Color*, *Font Color*, or *Font Format*.
12. To change the *Corners*, click the **settings** icon to select the corner, click on the slider to change corner radius, or click the **color** to change the border color.
13. To add a shadow, click the *Shadow* **toggle on**. Then, select the *Type* and *Position*. Click the **color** to open the color picker to update the color.
14. To change the secondary button format, click the *Secondary* tab. Then, update the button formatting as applicable.



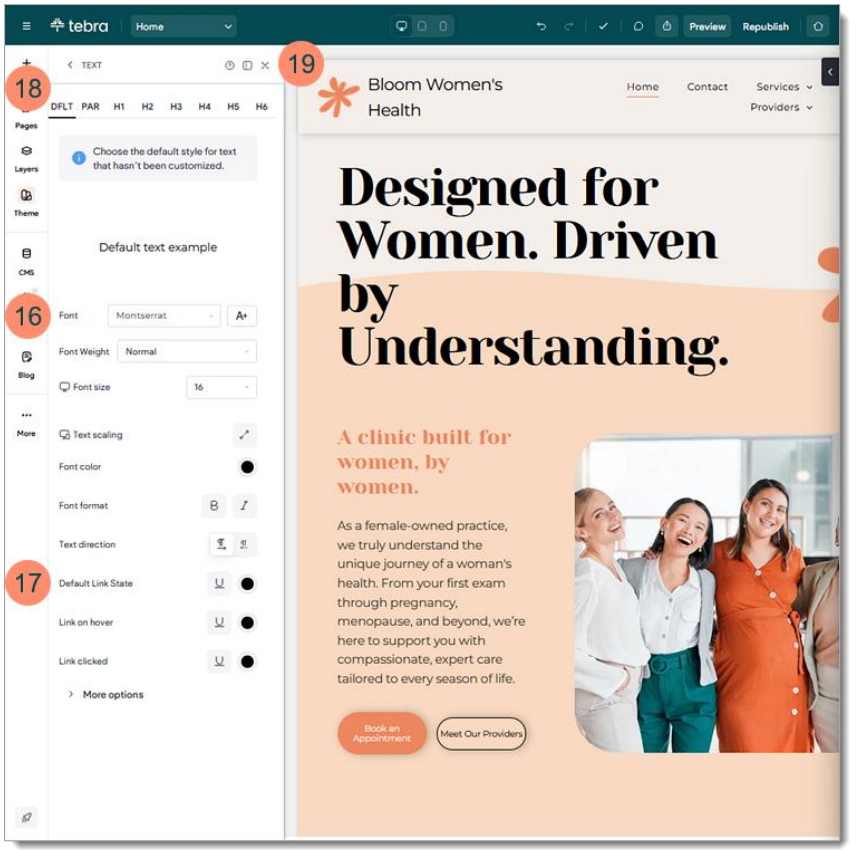
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Update Website Theme, cont.

15. To update the font, click the **right arrow** icon of the *Text* section. The *Default Text* panel opens.
16. To update the font, select the *Font*, *Font Weight*, *Font Size*, *Text Scaling*, *Font Format*, or *Text Direction*. Click the **color** to open the color picker to update the *Font Color*.

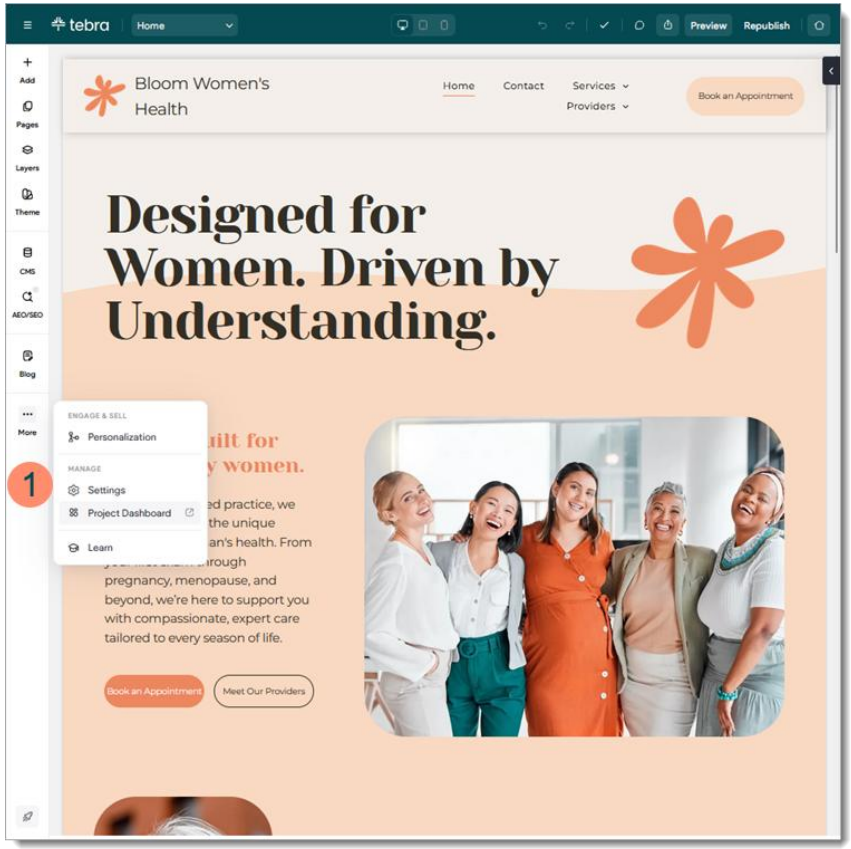
    Tip: Click **A+** to select a *Google Font* or upload a *Custom Font*.
17. To change the link style, select the *Default Link State*, *Link on Hover*, or *Link clicked* format or click the **color** to open the color picker.
18. To change the text format for other text styles (e.g., Paragraph, Header 1, Header 2, etc.), click on the corresponding tab. Then, update the text formatting as applicable.
19. Click the **X** icon to close the *Themes* panel.
20. Publish changes as applicable.



View Website Performance

The website performance dashboard shows detailed analytics about how many visitors your website site gets, where they are coming from, and which pages they have visited. The traffic dashboard also separates human visitor trends from Large Language Model (LLM) bot activity, providing clear visibility into real engagement versus automated AI crawling.

1. Click **More** and select *Project Dashboard*. The *Project Overview* page opens in a new browser tab.

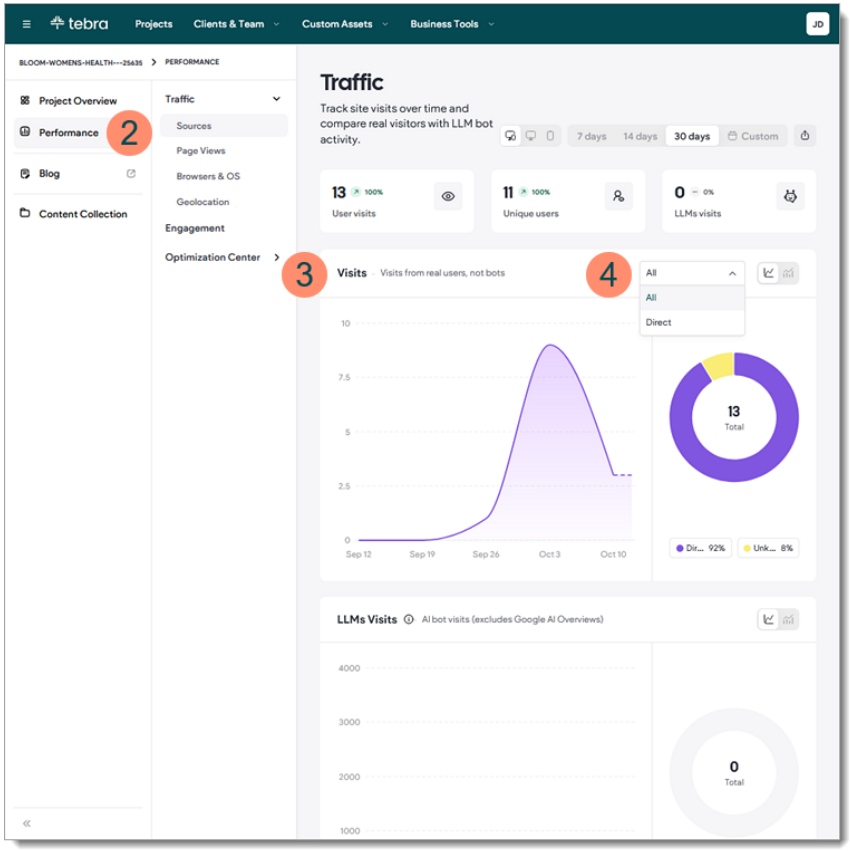


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View Website Performance, cont.

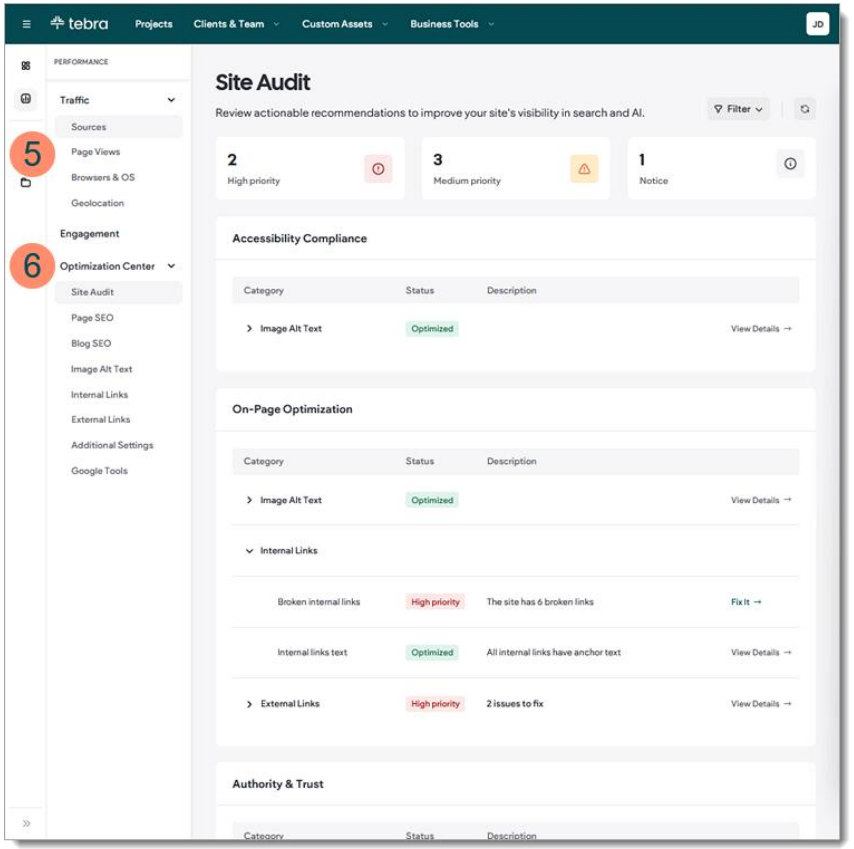
2. Click **Performance**. The *Traffic* dashboard opens.
3. **Visits:** Displays the number of human visitors over a period of time and how the website was accessed.
4. **Traffic Source:** By default, all traffic sources (e.g., direct, search, etc.) are displayed.
    a. To show traffic from visitors who accessed the website from a direct URL, click the **drop-down** and select *Direct*.



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View Website Performance, cont.

5. Additional statistics:
    a. **Page Views:** Click to review which pages attract the most views and engagement.
    b. **Browsers & OS:** Click to review which browsers and operating systems visitors were using.
    c. **Geolocation:** Click to review where visitors were in the world (country, state, and city) when they visited.
6. **Optimization Center:** Click to review the site's Search Engine Optimization (SEO) and Answer Engine Optimization (AEO) settings for improvements.
    a. **Site Audit:** By default, the *Site Audit* tab opens to review and resolve the website's ranking in traditional or AI search results. Click **View Details** to review the issue and click **Fix It** to open the applicable page to resolve the issue. A status display next to each section to indicate the action required. Available Status:
        - **High Priority:** Indicates issues that require immediate attention.

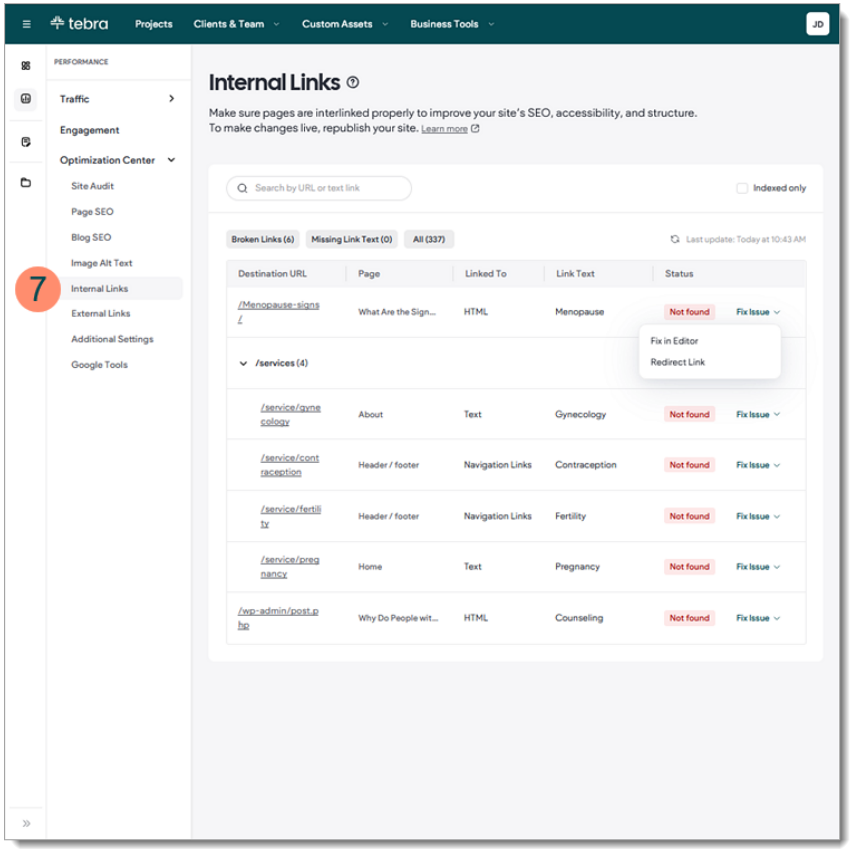


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- **Medium Priority:** Indicates issues of moderate importance that should be addressed when time permits.
- **Optimized:** Indicates that everything is set up correctly with no issues to fix.
- **Notice:** Indicates that there are recommendations to enhance the site's SEO, though not mandatory. For example, if you do not have a local business schema or a blog, they are assigned a 'Notice' status.

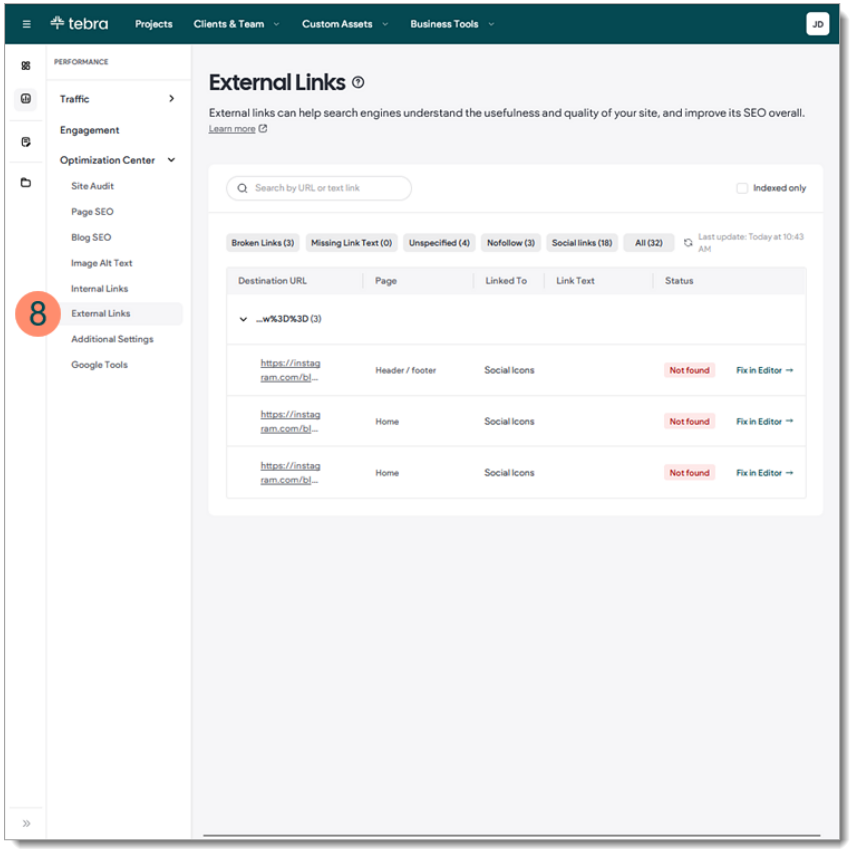
7. **Internal Links:** Click to review all internal links, including pop-up, header, footer, privacy pages, etc. The table displays the *Destination URL*, *Page*, *Link To* destination, *Link Text*, and *Status*.
   a. Filter the internal links by *Broken Links*, *Missing Link Text*, or show *All* internal links.
   b. If applicable, click **Fix Issue** to fix the issue in the editor or to redirect the link.



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View Website Performance, cont.

8. **External Links:** Click to review external links on the website. The table displays the *Destination URL*, *Page*, *Link To* destination, *Link Text*, and *Status*.
   a. Filter the internal links by *Broken Links*, *Missing Link Text*, or show *All* internal links.
   b. If applicable, click **Fix in Editor** to open the editor in a new browser tab to resolve the issue.



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The Digital Backbone for Practice Success

Tebra is the digital backbone built for both patient and provider well-being. From practice growth technology to clinical and financial software, our complete operating system is structured to modernize every step of the patient journey and support the connected practice of the future.

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