

PolicyPal Policies User Guide

This guide covers the **Policies** area of the Policy Pal WordPress plugin. It explains how to add new policies, replace existing files, and manage the main policy fields.

Open The Policies Page

1. Log in to WordPress.
2. In the left-hand admin menu, select **PolicyPal**.
3. Open the **Policies** page.

This page shows all existing policies and the upload area for new ones.

What You Can Manage

Each policy row includes the following fields:

- **Label:** the text shown to website visitors.
- **Slug:** the last part of the policy web address.
- **Category:** used to group policies on the website. Read more about categories [here](#)
- **Expiry:** an internal review date used for reminders.
- **Version:** an optional document version.
- The action buttons on each row let you replace the file, copy the link, delete the policy, and lock or unlock it.

Add a New Policy

If you are looking to update an existing policy, please see follow the "Replace/Update an Existing Policy Document" instructions

1. Open **Policy Pal > Policies**.
2. In the **Upload New Policies** section, select **Select PDF files**.
3. Choose one or more PDF files from your computer.
4. If needed, select a **Category**.
5. If you want the system to try to fill in the expiry date and version automatically, tick **Use AI to populate expiry and version**.
6. Select **Upload Policies**.

Each uploaded PDF creates a published policy entry automatically.

Notes

- Only PDF files are accepted.
- If you upload multiple files together, the selected category is applied to all of them.
- If AI is enabled and available on the site, the plugin may populate the expiry date and version for you.

Replace or Update an Existing Policy Document

1. Open **Policy Pal > Policies**.
2. Find the policy you want to update.
3. Select the **Replace file** button on that policy row.
4. Choose the new PDF file from your computer.
5. Wait for the upload to complete.

The existing policy entry stays in place, but the attached PDF is replaced with the new file.

When To Replace Instead Of Add

- Use **Replace file** when the policy is the same policy but has a newer version.
- Use **Upload New Policies** when you are adding a completely new policy that does not already exist in the list.

Edit Policy Details

You can update the policy information directly from the policy row.

- **Label:** change the displayed name of the policy.
- **Slug:** change the public URL ending for the policy. If you edit the slug, you will get a pop-up which asks if you would like to create a redirect from the old slug to the new one. We recommend you select yes to this.
- **Category:** move the policy into a different category.
- **Expiry:** select the month the policy expires.
- **Version:** enter or update the version number.

If a policy is locked, some fields cannot be changed until it is unlocked.

Copy A Policy Link

1. Find the policy in the list.
2. Select the **Copy link** button.

3. Paste the copied link wherever you need it.

This copies the live public URL for that policy.

Delete a Policy

1. Find the policy in the list.
2. Select the **Delete** button.
3. Confirm the action if prompted.

Use this only when the policy should be removed completely from the site. This action is irreversible

Lock or Unlock a Policy

A locked policy has restricted editing for non-admin users. An unlocked policy can be edited normally. Select the padlock button on the policy row to change its lock status.

Troubleshooting

The file will not upload

- Check that the file is a PDF.
- Try uploading the file again.
- If AI was enabled, try again without AI to rule out an AI extraction issue.

I cannot edit a policy

- Check whether the policy is locked.
- If the policy is managed from the portal, some fields may be read-only on the WordPress site.

The wrong policy was updated

- Use **Replace file** only when updating an existing policy.
- If you accidentally replaced the wrong policy, replace it again with the correct PDF.

Summary

For most day-to-day work:

- Use **Upload New Policies** to add new policy documents.
 - Use **Replace file** to upload a newer version of an existing policy.
 - Use the policy row fields to keep labels, categories, expiry dates, and versions up to date.
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