REMV2.1 003 - TPP user guide (internal) V1

How to use the TPP system

UPDATED: June 2018

This user guide covers how to use the functionality in the TPP system, this includes moderating feedback, managing case studies and news, managing taxonomy terms and the referral process.

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Summary of document changes

Version	Date	Summary
First release		

Introduction

The purpose of this document is to detail how the TPP system can be used and configured.

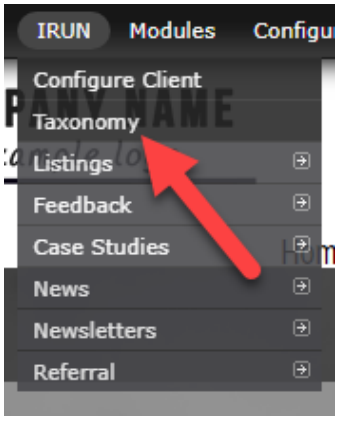
This document covers;

- How to set up and configure taxonomy terms
- How to configure the feedback settings, including the feedback form
- How to enter feedback
- How to edit and moderate feedback
- How to set up and run the referral process, including redeeming vouchers
- How to create and edit case studies
- How to create and edit news items
- How to create and edit taxonomy term pages
- How to manage blocks
- What token codes are available and how to use and configure them

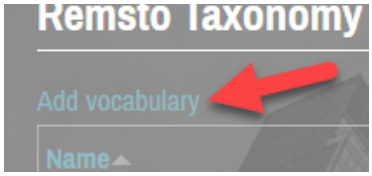
Setting up taxonomy terms

When setting up the site the taxonomy terms need to be set up so that feedback etc. can be tagged to them.

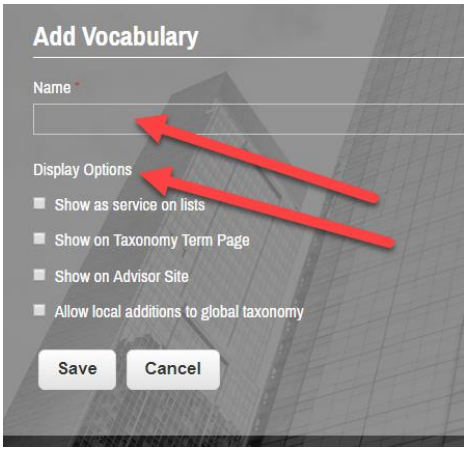
1. Log into the site with the usual details
2. Go to IRUN - > Taxonomy



3. Click 'add vocabulary'

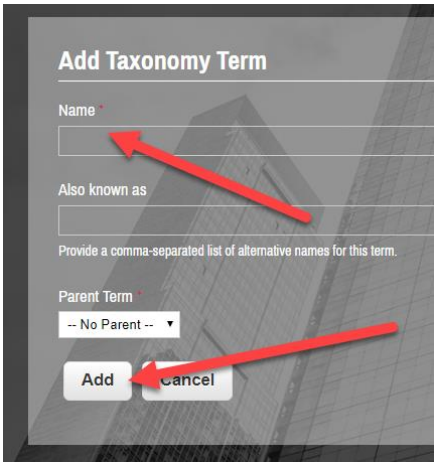


4. Give the Vocabulary a name and choose the display options
   The display options let you decide how you want the terms to be seen by the site, the options are below, you can choose multiple (this means you can create multiple vocabularies and display them differently);
   a. Show as services on lists – this means the taxonomy terms in this vocabulary will display next to the 'Services provided' spanner icon
   b. Show on taxonomy term page – this means the taxonomy terms in this vocabulary can be tagged to a taxonomy term page
   c. Show on advisor site – this means the taxonomy terms in this vocabulary will display on the listing connected to the site and on advisor sites
   d. Allow local additions to global taxonomy – not needed as these will all be local

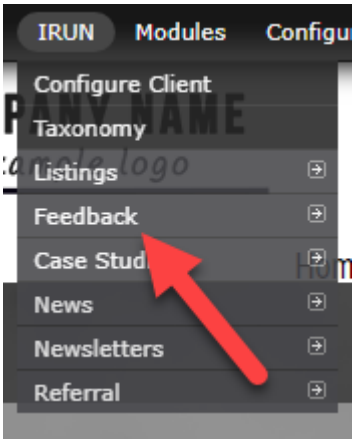


5. Click save once complete

6. Click ‘add term’ for the vocabulary
7. Give the term a name and click add
   Leave parent term blank as it is not needed on TPP sites

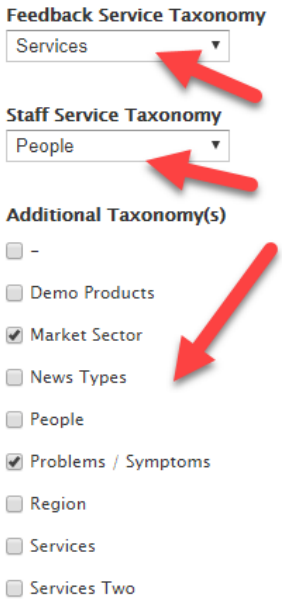


8. Once you have created all the terms you need go to IRUN - > Feedback

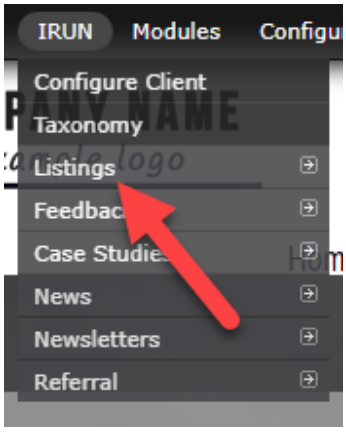


9. This is where you choose which taxonomy terms can be tagged to feedback
   Using the dropdown list under ‘Feedback service taxonomy’ choose the vocabulary you want to use e.g. services or treatments
   There is also the ability to have a dropdown taxonomy term list
   If you want to use more than one vocabulary on the site you can by ticking the box next to the vocabulary you want under ‘additional vocabularies’

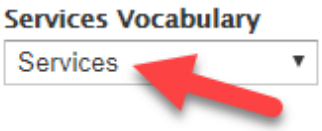
Then ‘save configuration’ at the bottom of the page



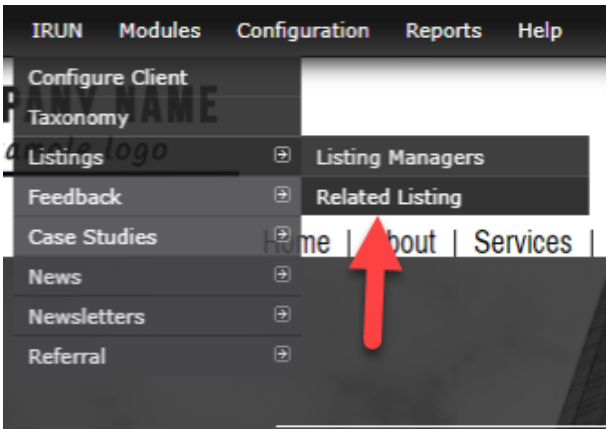
10. Next you need got to IRUN - > Listings



11. This is where you choose the vocabulary that will display on the listing
    Using the dropdown list under ‘Services Vocabulary’ choose the vocabulary you used for the feedback page
    Click ‘submit’



12. Next you will need to select which taxonomy terms you want to display on your TPP site, to do this you need to go to IRUN - > Listing - > related listing

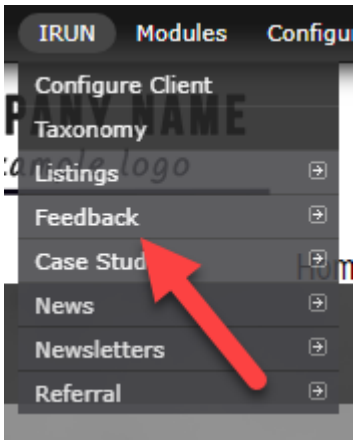


13. Click on edit and scroll down to the services section, tick all the taxonomy terms and submit

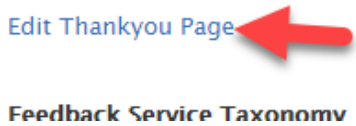
Editing Feedback settings

Before feedback starts to be entered the settings need to be configured, the main reason for this is adding the e-mail addresses of those who should receive feedback notifications

1. Go to IRUN -> Feedback



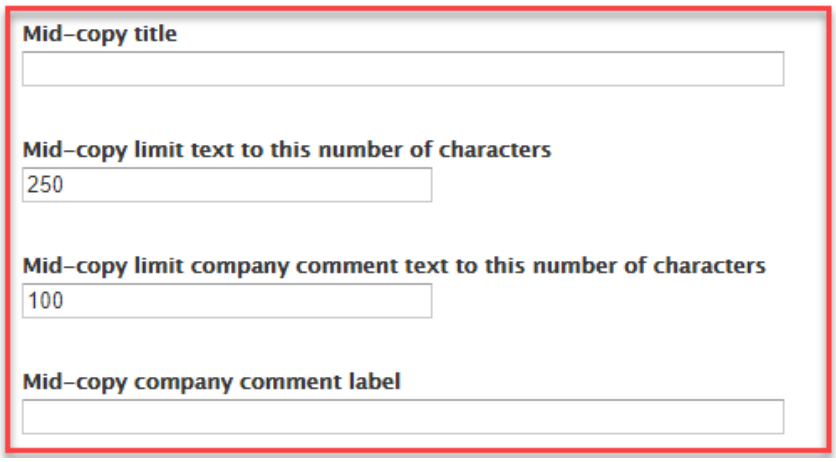
2. This is where you can change the feedback settings, there are several options that can be changed
    a. Edit Thankyou Page – this is a link to allow you to edit the thank you page that displays once someone has provided feedback



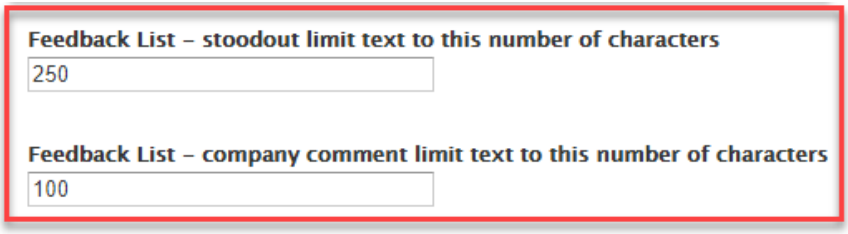
    b. Add button text – The text that displays as a link to the feedback form on the feedback page

    c. Display optional fields – This gives you the ability to display additional fields to name and e-mail address on the feedback form

d. Mid-copy fields – these are for the tokens, when displaying in a page this lets you decide how many characters display for each section

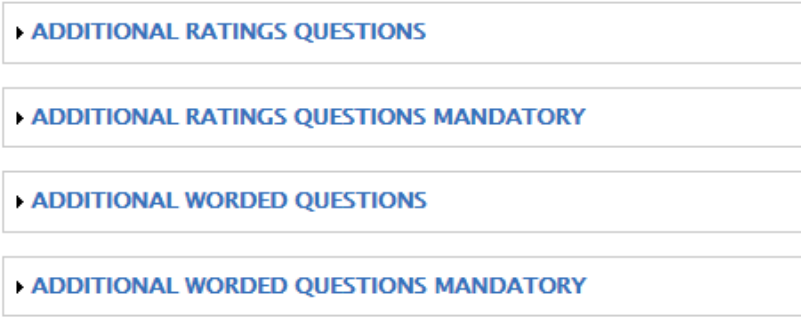


e. Feedback list fields – this lets you decide how many characters are displayed of each section on the feedback page



f. Feedback form labels and text configuration – this allows you to change the wording of the fields on the feedback form

i. Within this section there is also the ability to add additional questions if you want to, choose which type of question you want to add and type into the free text field provided
You also have the option to make the question mandatory



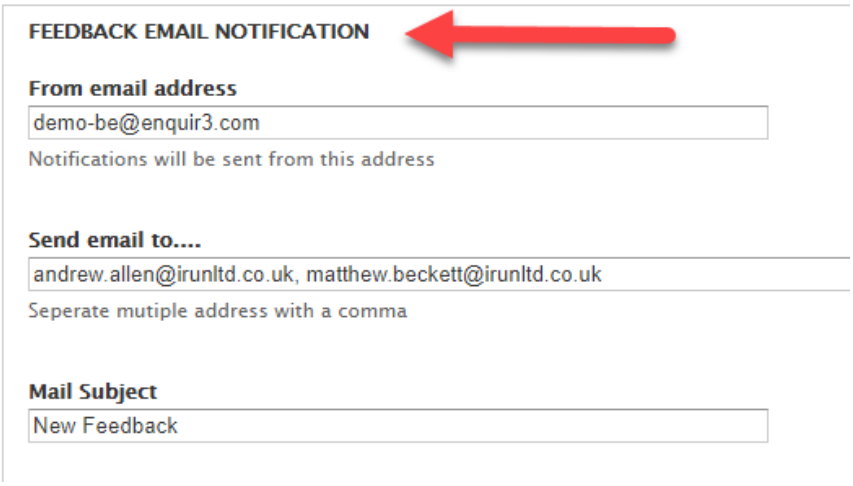
g. Feedback page labels and text configuration – This is where you can change the title of the feedback page

h. Feedback form items ordering – This is where you can change the order that the feedback form displays in

i. Feedback form fields descriptions – This is where you can add a short description to each field on the form, it will display under the field name

j. Hide feedback form fields from anonymous users – This is where you can choose which fields display when logged out

k. Feedback e-mail notification – This is where you choose what e-mail address the notifications are sent from in the 'From email…'field, who receives the feedback e-mail by entering the e-mail addresses in the 'send email to…' field and decide the subject line of the e-mail in the 'mail subject' field



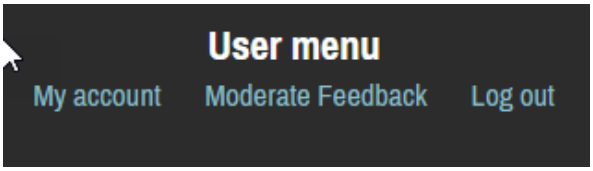
Entering New Feedback

New feedback can be added by simply visiting the feedback form, this can easily be navigated to through the site by going to the feedback page and clicking 'Please leave feedback'. This form can be filled in by customers or on behalf of customers.

Moderating Feedback

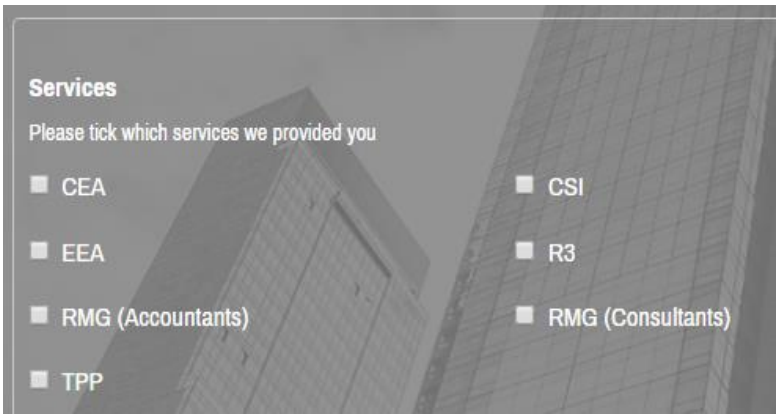
After you have received a new piece of feedback, it will need to be moderated and published on the site.

1. Scroll to the bottom of the page and click on 'moderate feedback'



2. Then click on 'moderate' next to the piece of feedback you want to moderate

3. If the feedback has not already been tagged to taxonomy terms you can do it here by ticking the relevant terms



4. Choose how you want to moderate the feedback and which sites it will be displayed on, if you choose 'published and promoted' it will show up in the 'Our outstanding feedback' tab on the feedback page, if you choose 'published' the it will show up in the 'More great feedback' tab on the feedback page

5. You can change the creation date and time of the feedback if you want it to look more recent / older

6. If you want to reply to the feedback then enter this in the 'company comment' field

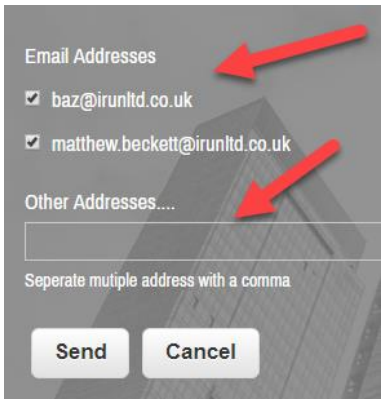
7. There is also the option the add a video testimonial (to do this copy a paste the URL of the video from somewhere like YouTube into the field provided)

8. You can add a title for the feedback

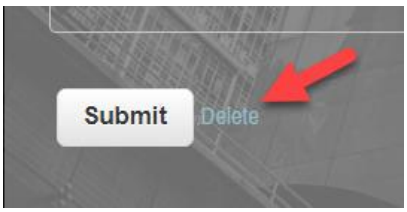
9. You can also add an image to the feedback, which will display in the feedback pop-ups when you click the 'more' button

10. When you have finished click submit

11. You have the ability to re-send the feedback notification e-mail should you need to, simply click on 'resend mail notification' then choose who it needs to go to and click send



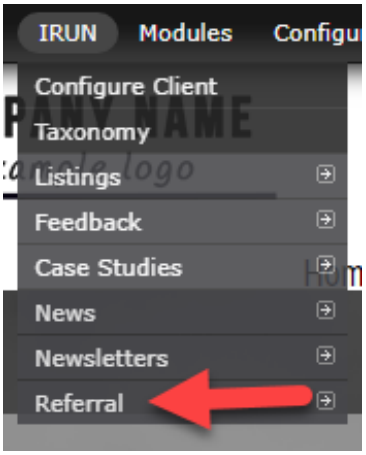
12. If you decide you want to delete the feedback click the delete button next to submit
On the next screen click 'permanently delete' (this will reduce the junk on the system)



Referral process

Once feedback has been received and moderated you have the ability to do a referral process. The referral process is the process of asking the people who give feedback to refer someone who could benefit from your services, in return for a reward of your choice.

1. To change the referral settings go to IRUN -> Referral



2. Change the information in the fields to what you want and save

Company name

Wines 4 U

Enter the name company as you wish it to display for emails sent as part of the referral process.

Company telephone number

01865 920003

Enter the telephone number for the company as you wish it to display for emails sent as part of the referral process.

Company email

bazza@irunltd.co.uk

Enter the email for the company as you wish it to display for emails sent as part of the referral process.

Referrer reward

A tour of a vineyard in Greece

Enter the reward you would like to give to people who have referred others.

Referred reward

A bottle of wine

Enter the reward you would like to give to people who have been referred.

Number of Repeat Requests

1

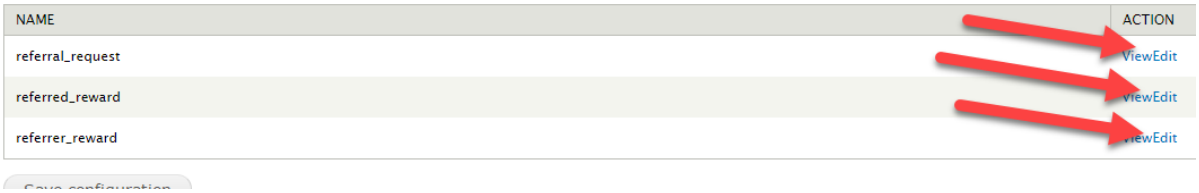
The total number of times a referral request will be sent.

Delay between sending referral emails (hours)

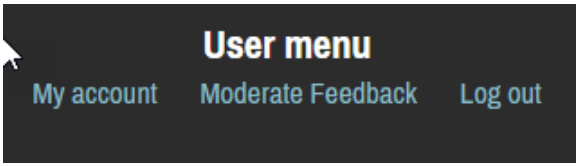
1

Enter the minimum number of hours to elapse before sending the referral request email, or repeat referral request emails.

3. If the text in the e-mails needs to be changed click on edit next to the e-mail you want to change, be careful not to delete the tokens within the text as this may stop the functionality from working

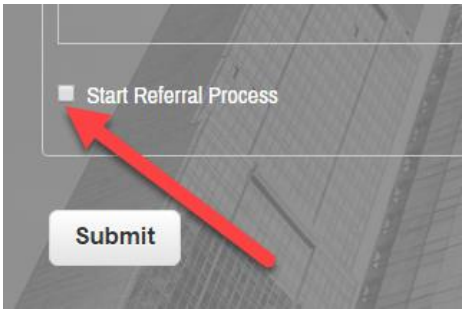


4. Once this is configured the process can start, to do this scroll to the bottom of the page and click on 'moderate feedback'

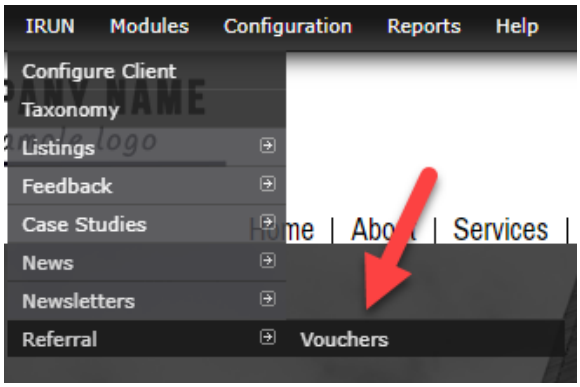


5. Then click on 'moderate' next to the piece of feedback you want to put through the referral process

6. Scroll to the bottom and tick the box next to 'Start Referral Process'(this process cannot be restarted once it has begun), then submit



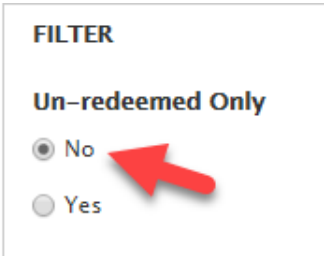
7. Once the process has been started and referrals have been made you can redeem vouchers, to do this go to IRUN - > Referral - > Vouchers



8. Click on the tick in the 'redeem' column for the voucher that has been claimed, this will then cause the voucher to disappear from the list

VOUCHER CODE	ISSUED TO	REWARD	REDEEMED	EXPIRES	REDEEM
58dcc4c403bf6	baz@irunltd.co.uk	1 day consultation with Steve	No	27/04/17	✓
58ecf73b4bcc3	b@irunltd.co.uk	A bottle of wine	No	09/05/17	✓

9. To see the redeemed vouchers if needed, change the filter at the top to 'no' (it defaults to 'Yes') this will then show a list of all the vouchers that have been issued, the ones without a tick have been redeemed

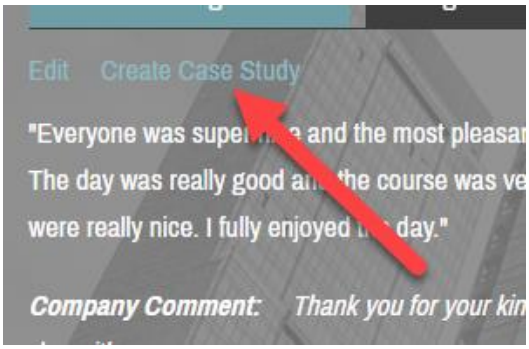


VOUCHER CODE	ISSUED TO	REWARD	REDEEMED	EXPIRES	REDEEM
58dcc46771955	andrew.websiteowner@irunltd.co.uk	A Soap on a Rope	Yes	27/04/17	
58dcc4c403bf6	baz@irunltd.co.uk	1 day consultation with Steve	No	27/04/17	✓
58dcc725022cc	matthew.beckett@enquir3.com	A Soap on a Rope	Yes	27/04/17	

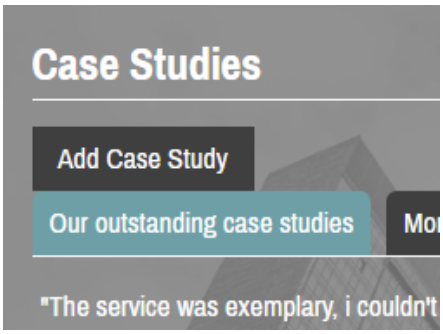
Creating a case study

In addition to having feedback on your site there is also the ability to have case studies, giving you the chance to show more in depth customer stories.

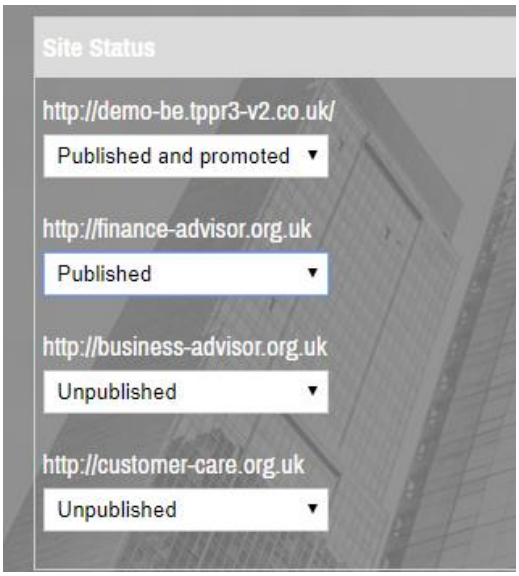
1. To create a case study you have an option of two places to do this:
    a. Under the feedback tab there is a link above each piece of feedback, this would be creating a case study connected to the feedback



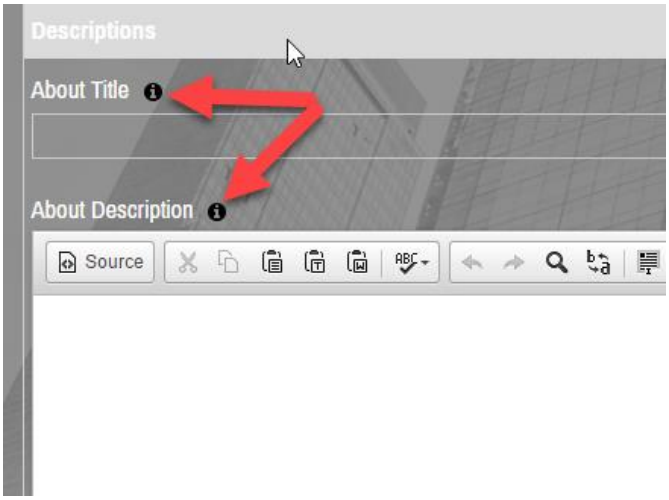
b. Under the case study tab there is an ‘add case study’ button at the top of the page, this would be adding a case study that is not connected to a piece of feedback



2. Choose how you want the case study to display and which sites it will be displayed on using the dropdown lists, if you choose ‘published and promoted’ it will show up in the ‘Our outstanding case studies’ tab on the case studies page, if you choose ‘published’ then it will show up in the ‘More great case studies’ tab on the case studies page

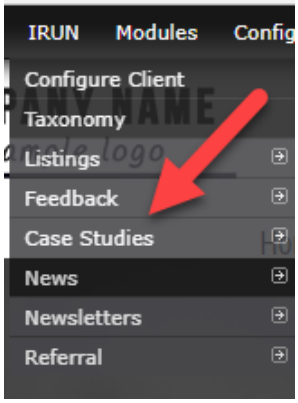


3. Fill in the relevant fields as required, then save
There are information buttons if you need an explanation of what goes in the field (the image below is just to display the information buttons, there are several other fields that can be filled in to create the case study)

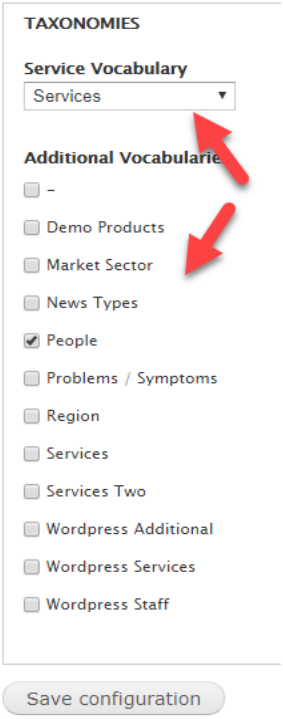


a. Case studies can be tagged to taxonomy terms in the same way as feedback, simply tick the ones that apply (the first list appears in the middle of the form and the second set of lists appears at the bottom)

i. You can change the taxonomy terms that appear here by going to IRUN -> Case Studies



ii. Choose the first list in the dropdown then tick or untick the box next to the relevant taxonomy vocabularies for the second set of lists and then save



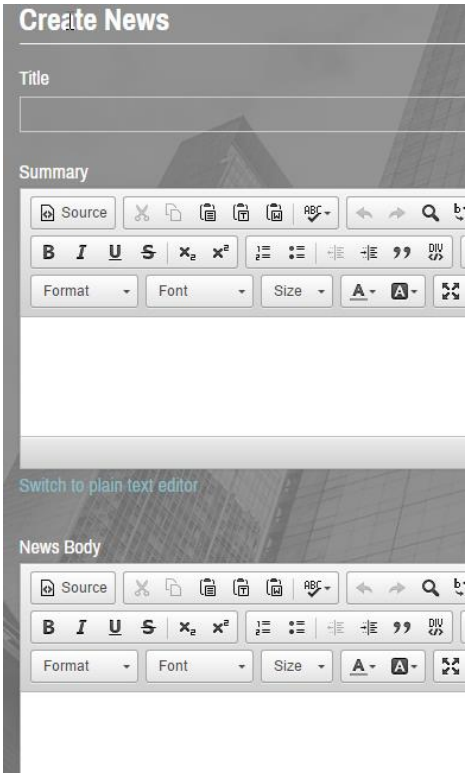
4. If you need to make any changes to the case study once created there is an ‘edit’ button

Creating news

In addition to feedback and case studies you have the ability to create news, this can be any type of news that you want on your site.

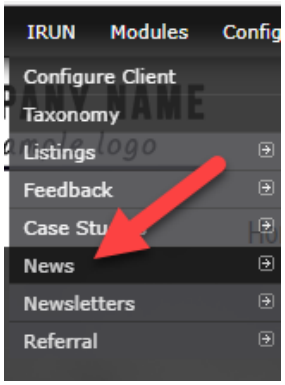
1. Go to the news tab and click ‘add news’

2. Fill in the fields as required, then save
   a. The summary field is for the section on the news page whereas the news body displays as the news article itself when you click on ‘read more’

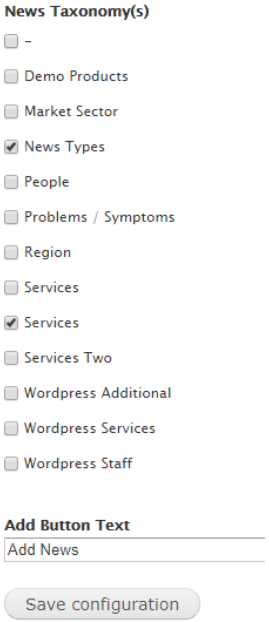


b. News can be tagged to taxonomy terms in the same way as feedback and case studies, simply tick the ones that apply

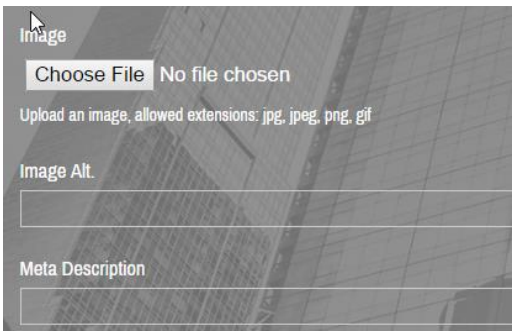
i. You can change the taxonomy terms that appear here by going to IRUN -> News



ii. Tick or untick the box next to the relevant taxonomy vocabularies and then save

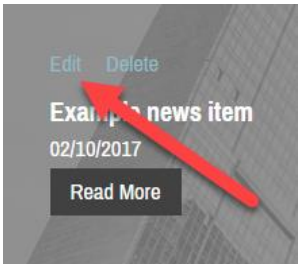


c. For the image upload make sure the image file size is as small as possible, the image does not need to be any specific size as it will get re-sized when in the article



3. Once created you need to decide where the news item will display, the news item gets automatically published on the site, to find it go to 'more great news'

4. Next click edit on the news item you just created

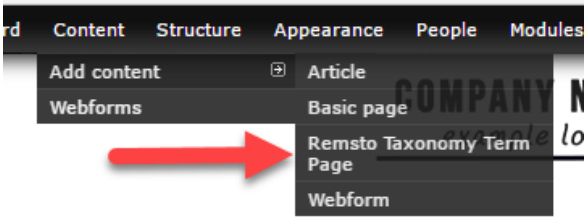


5. Scroll down to the 'display status' section and decide how you want the news to be displayed and which sites it will display on, if you choose 'published and promoted' it will show up in the 'Our outstanding news' tab on the feedback page, if you choose 'published' then it will show up in the 'More great news' tab on the news page, then scroll down and click update

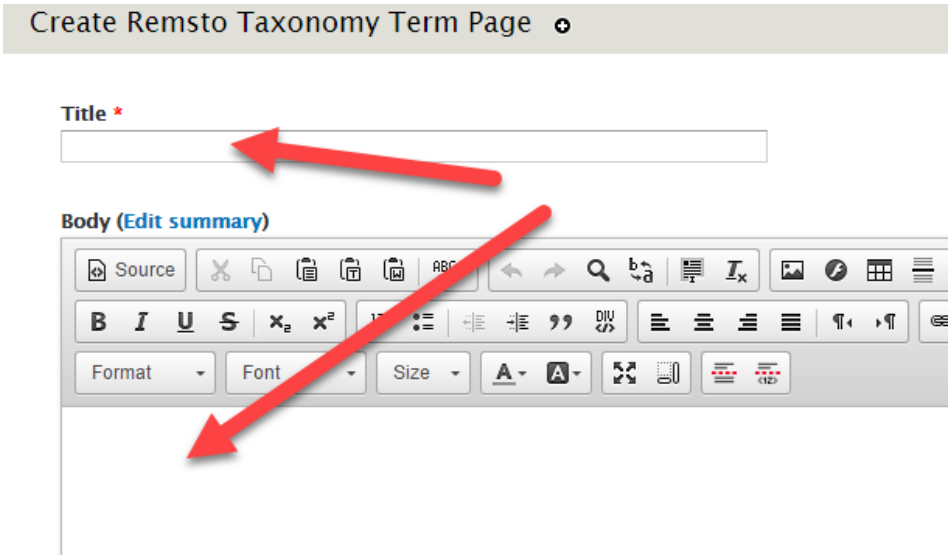
Creating taxonomy term pages

You have the ability to create pages that are about a specific taxonomy term, these pages can be tagged to a specific taxonomy term which will mean the feedback, case studies and news that can display on this page (within blocks and using 'tokens' – these are the next two sections) will relate to the specific taxonomy term.

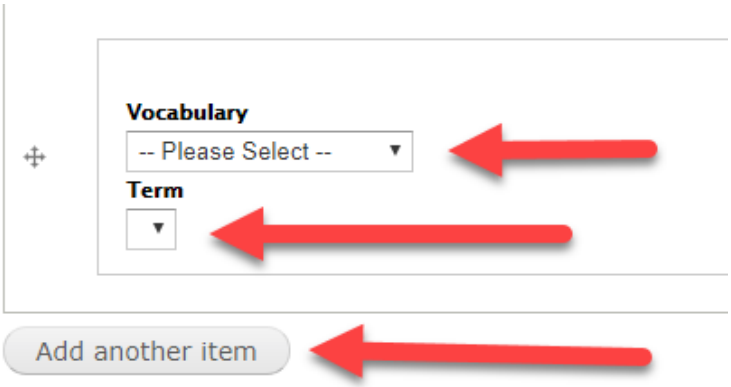
1. Go to Content -> add content -> Remsto Taxonomy Term Page



2. Give the page a title and some content as you would on a normal page, in the content there is the ability to enter 'tokens' that can pull through feedback, case studies and news to show within the page (these tokens are laid out at the end of the guide)



3. Next you need to choose the taxonomy term the page relates to, choose your vocabulary in the 'vocabulary' drop down, then choose the taxonomy term required from the 'term' drop down and if you want to tag more than one taxonomy term to a page click 'add another term' and you will get the same fields to fill in



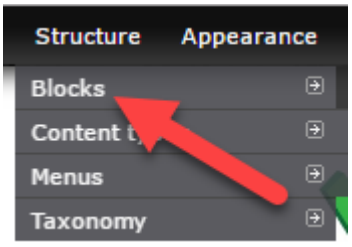
Blocks

There is a selection of blocks that can be used to display feedback, case studies and news throughout your site.

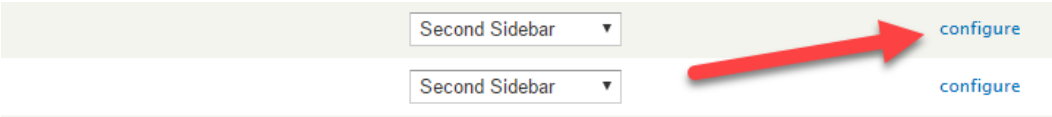
Below is a list of the blocks that can be used;

- Feedback block (Sidebar - Fixed)
- Feedback block (Sidebar - Scrolling)
- Feedback block (Landscape - Fixed)
- Feedback block (Landscape – Scrolling)
- Case Study - Recent (Portrait) - Fixed
- Case Study - Recent (Portrait 2) - Scrolling
- Case Study - Recent (Landscape) - Scrolling
- Case Study - Recent (Landscape 2) - Fixed
- News block (Sidebar - Fixed)
- News block (Sidebar - Scrolling)
- News block (Landscape - Fixed)
- News block (Landscape - Scrolling)

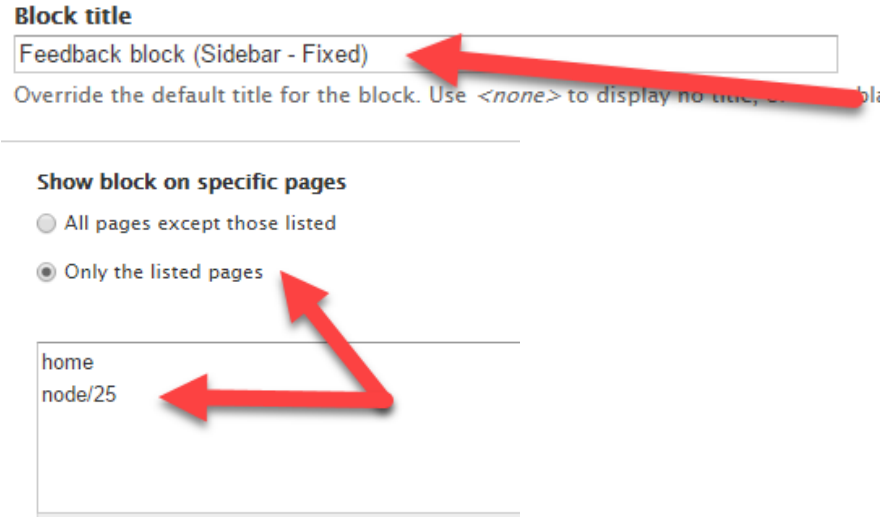
1. Firstly go to structure -> blocks



2. Scroll down until you find the block you are looking for and click 'configure' next to it



3. Leave most of the settings as they are to keep default, change the title to what you want and decide which pages you want the block to show on (this can be with the node reference or the URL path (only if the page has no node))



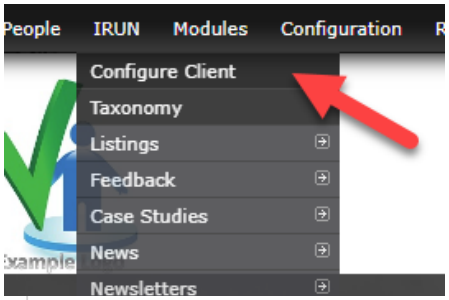
Changing settings on blocks **(anything not mentioned below leave as default)**

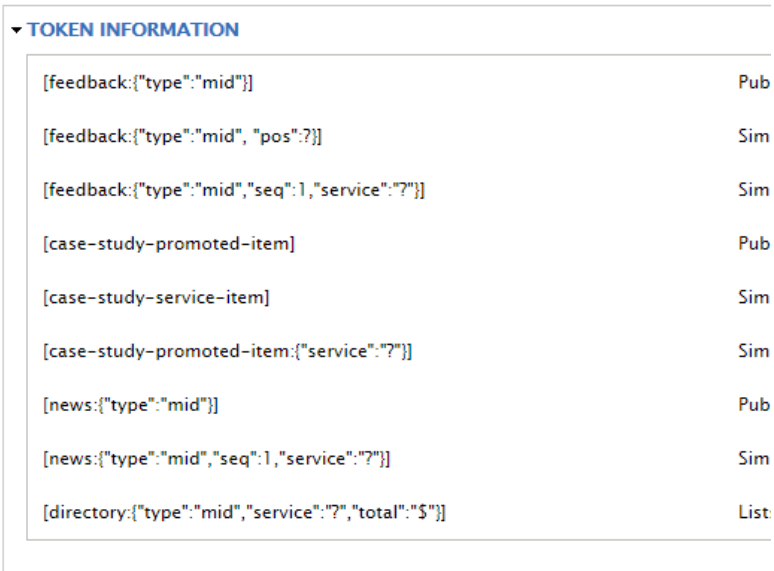
- Number of recent feedback/case study/news items – This is where you decide how many items there are to scroll through in a scrolling block, drop down choice of 1 - 10
- Summary description character limit – Leave at 150 or lower so that it fits in the block properly
- Jcarousel settings
    - Enable the Jcarousel – tick if you want the block to scroll
    - Wrap content – Disabled for fixed blocks or circular for scrolling blocks
    - Number of visible items – maximum of 3 for sidebar and 4 for landscape, you can have less if you want, drop down choice
    - Scroll – this is how many items scroll at a time, drop down choice of 1 – 10
    - Auto-scroll after – this is where you decide how regularly the block scrolls, free text so you can put whatever number you want in seconds
    - Advanced
        - Animation speed – this is how fast the block scrolls, free text as above, in milliseconds so 7000 is 7 seconds
        - Vertical – This decides which direction the items in the block with scroll
    - Region settings – always set this in the default theme, for a sidebar block set to 'second sidebar' and for a landscape block set to 'content bottom top' (if this content area is not available it will need to be added)

Token codes

These are the 'token' codes to put into the middle of text to pull feedback, case studies and news through into a page, all rotate when the page is refreshed and can be added to any type of page;

These are also listed on the TPP sites, got to IRUN - > Configure Client
Then click on Token Information and they are all there





Mid-copy promoted feedback general – This 'token' pulls through every piece of 'published and promoted' feedback in a random order and can be used on any type of page.

[feedback:{"type":"mid"}]

Mid-copy promoted feedback general (multiple on page, replace '?' with 1, 2, 3 or 4) – This 'token' works the same as the one above, however it is used for having multiple on a page. The "pos" stands for position, therefore adding a number instead of the '?' (1 for the first 'token', 2 for the second etc.) means that the 'tokens' will never show the same piece of feedback at the same time.

[feedback:{"type":"mid", "pos":?}]

Mid-copy promoted feedback service specific - This 'token' pulls through every piece of 'published and promoted' feedback relating to a specific service and rotates when the page is refreshed. The process for finding the number to replace the "?" is detailed at the end of the guide.

[feedback:{"type":"mid","seq":1,"service":"?"}]

Mid-copy promoted case study general - This ‘token’ pulls through every ‘published and promoted’ case study in a random order.

[case-study-promoted-item]

Mid-copy promoted case study for service page - This ‘token’ pulls through every ‘published and promoted’ case study in a random order on a service page only and all relate to the service that the page has been tagged to.

[case-study-service-item]

Mid-copy promoted case study service specific - This ‘token’ pulls through every ‘published and promoted’ case study relating to a specific service and rotates when the page is refreshed. The process for finding the number to replace the “?” is detailed at the end of the guide.

[case-study-promoted-item:{"service":"?"}]

Mid-copy news article - This ‘token’ pulls through every piece of ‘published and promoted’ news in a random order and can be used on any type of page.

[news:{"type":"mid"}]

Mid-copy news article service specific - This ‘token’ pulls through every piece of ‘published and promoted’ news relating to a specific service and rotates when the page is refreshed. The process for finding the number to replace the “?” is detailed at the end of the guide.

[news:{"type":"mid","seq":1,"service":"?"}]

Mid-copy block – This is styling that can be added to the ‘token’ codes to make them look like a block within the content.
To enter this code click on the source button when editing a page, choose where in the page you want it to display, put the relevant ‘token’ code where it says “’token’ code” in the section of code below
You can also choose whether it displays on the left or right of the page, simply by changing where it currently says “right”
The last thing that can be changed here is the block title, for this just change the text ‘Recent Feedback’ to whichever type it is - feedback, case studies or news

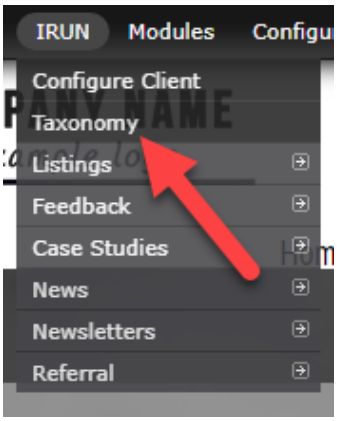
```
<div class="right" id="in-content-block">
<h2>Recent Feedback</h2>
“‘token’ code”</div>
```

This is an example of what the mid-copy block will look like when entered, it can be styled to look different if required.

Finding service specific code for tokens

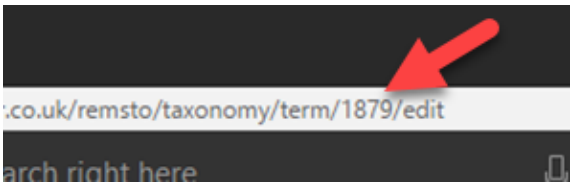
There are 2 ways that you can find the service specific code;

1. Go to IRUN - > Taxonomy



2. Click on 'list terms' next to your vocabulary

3. Then hover over edit with your mouse for the service you want, in the bottom left hand corner there is the URL with some words and a number after it, you just need to know the number



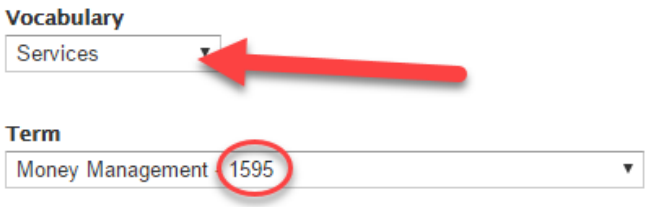
4. Choose the page you want to add the mid copy to, click edit and somewhere in the content (where it will be appropriate) enter [feedback:{"type":"mid","service":"?"}] but replace the

'?' with the number of your service, this is the same for the tokens relating to case studies and news

Or

1. When you go to create a Remsto Taxonomy Term Page

2. The 'term' dropdown, will display the taxonomy term number at the end, this is the 'service' code



3. Then choose the page you want to add the token to, click edit and somewhere in the content (where it will be appropriate) enter [feedback:{"type":"mid","service":"?"}] but replace the '?' with the number of your service, this is the same for the tokens relating to case studies and news