
REMV2.1 008 - Advisor site listing owner user guide V1

How to edit the data
sharing settings when
a site goes live

UPDATED: June 2018

This user guide covers how to use the functionality in the Advisor sites, this includes moderating feedback, editing a listing and creating subusers.

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Summary of document changes

Version	Date	Summary
First release		

Introduction

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

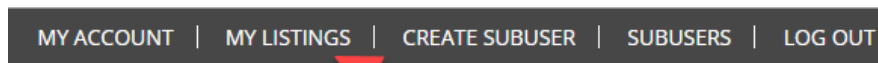
This document covers;

- How to enter feedback
- How to edit and moderate feedback
- How to edit a listing
- Creating subusers

Entering New Feedback

There are two ways to enter feedback on a listing;

1. This is only if you are collecting feedback on one of your listings
 - a. Go to 'my listings' at the top of the page



- b. Click on the listing you want

My Listings

Company Name ▲ Com

IRUN Ltd com

- c. Click on the 'Leave feedback' tab and fill in the form as required

Feedback | More Feedback | **Leave Feedback** | News | Services | Case Studies | About Us

What stood out about the service you received? *

2048 characters left.

Would you recommend our services? *

Yes No N/A

Staff member served by or service(s) provided

Was the service delivered as promised? * 1 2 3 4 5 N/A

Did they offer good value for money? * 1 2 3 4 5 N/A

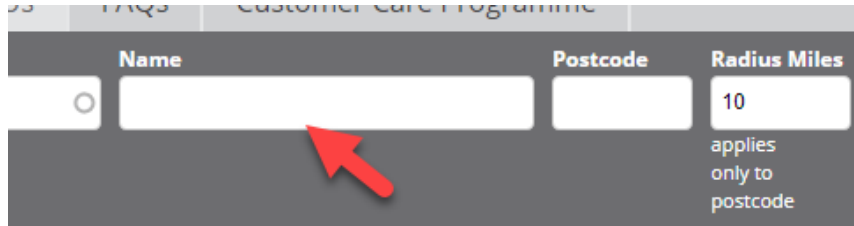
Were they considerate and helpful? * 1 2 3 4 5 N/A

Please rate the quality of communication * 1 2 3 4 5 N/A

If anything, what could we do better?

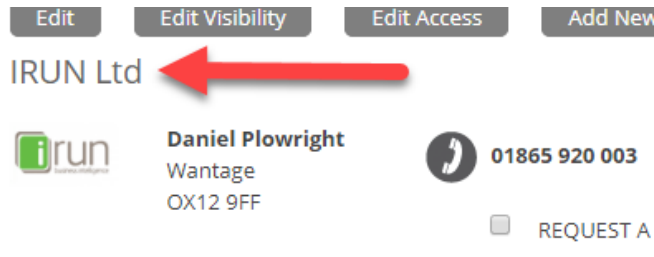
2. The other way is leaving feedback on someone else's listing listing

- a. Search for the company in the 'Name' field in the search bar



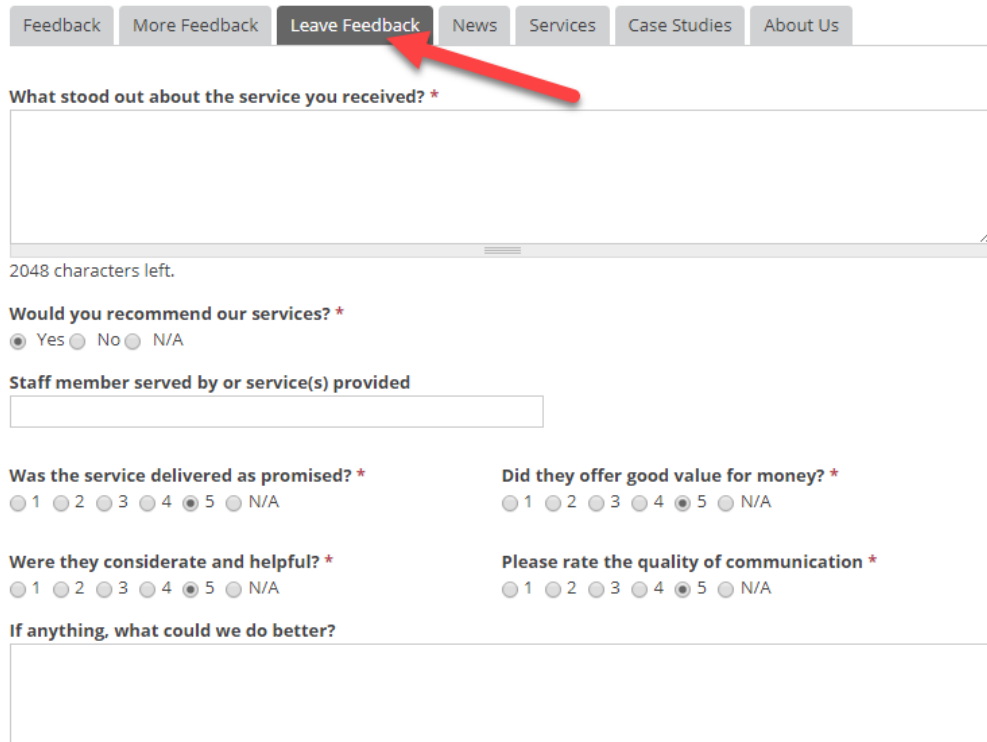
The screenshot shows a search interface with three input fields: 'Name', 'Postcode', and 'Radius Miles'. The 'Name' field is highlighted with a red arrow. Below the 'Radius Miles' field, there is a note: 'applies only to postcode'.

- b. Click on the listing for the company



The screenshot shows a company listing for 'IRUN Ltd'. Above the name are buttons for 'Edit', 'Edit Visibility', 'Edit Access', and 'Add New'. Below the name is the company logo, the name 'Daniel Plowright', the address 'Wantage OX12 9FF', a phone icon with the number '01865 920 003', and a 'REQUEST A' button.

- c. Click on the 'Leave feedback' tab and fill in the form as required



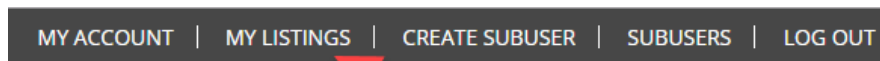
The screenshot shows a feedback form with several sections:

- A navigation bar with tabs: 'Feedback', 'More Feedback', 'Leave Feedback' (highlighted with a red arrow), 'News', 'Services', 'Case Studies', and 'About Us'.
- A text area for feedback with the prompt: 'What stood out about the service you received? *'. Below the text area is a character count: '2048 characters left.'.
- A radio button question: 'Would you recommend our services? *' with options: 'Yes', 'No', and 'N/A'.
- A text input field for 'Staff member served by or service(s) provided'.
- Two radio button questions with 5-point scales:
 - 'Was the service delivered as promised? *' with options: 1, 2, 3, 4, 5 (selected), N/A.
 - 'Did they offer good value for money? *' with options: 1, 2, 3, 4, 5 (selected), N/A.
- Two more radio button questions with 5-point scales:
 - 'Were they considerate and helpful? *' with options: 1, 2, 3, 4, 5 (selected), N/A.
 - 'Please rate the quality of communication *' with options: 1, 2, 3, 4, 5 (selected), N/A.
- A final text input field with the prompt: 'If anything, what could we do better?'.

Moderating Feedback

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

1. Go to 'my listings' at the top of the page



2. Click on 'Comments' for the listing you want



3. Once you are in moderate find the piece of feedback you want to moderate and click 'moderate' next to it

Moderate Feedback

▶ CAPTCHA: challenge "reCAPTCHA" enabled

Date/Time/Moderate	Status	Stood Out
15-06-2017 04:46 Moderate	Unpublished	I was really c and this ans my quionest
16-05-2017 10:49 Moderate	Unpublished	We don't hav contact with we just tick a did have son recently whe

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

Global Services

- | | |
|--|--|
| <input type="checkbox"/> Content Creation | <input type="checkbox"/> Content Marketing |
| <input type="checkbox"/> Copywriting | <input type="checkbox"/> Customer Care Programme (CCP) |
| <input type="checkbox"/> Customer Satisfaction | <input type="checkbox"/> Design & Branding |
| <input type="checkbox"/> E-mail Marketing | <input type="checkbox"/> Feedback & Referrals |
| <input type="checkbox"/> Hosting Services | <input type="checkbox"/> Mobile App Development |
| <input type="checkbox"/> Pay Per Click (PPC) | <input type="checkbox"/> Search Engine Marketing |
| <input type="checkbox"/> Training | <input type="checkbox"/> Website Development |

5. 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 of either the site or listing, if you choose 'published' the it will show up in the 'More great feedback' tab on the feedback page on either the site or the listing

Status on site <http://irunltd.co.uk>

Unpublished Published Published and promoted

Status on site <http://risk-directory.gfbr3core1.co.uk/>

Unpublished Published Published and promoted

Status on site <http://bb-bmg.uk>

Unpublished Published Published and promoted

Status on site barringtons.gfbr3core1.co.uk

Unpublished Published Published and promoted

Status on site <http://www.onlineadvisors.org.uk/>

Unpublished Published Published and promoted

Status on site <http://www.design-advisor.com>

Unpublished Published Published and promoted

Status on site <http://legallybetter.co.uk>

Unpublished Published Published and promoted

Status on site <http://business-advisor.org.uk>

Unpublished Published Published and promoted

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

Created

Date

16/05/17

E.g., 28/06/18

Time

10:49

E.g., 13:01

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

Company comment

2048 characters left.

8. 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)


Video testimonial

9. You can add a title for the feedback

Title

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

Image
 No file chosen
Upload an image, allowed extensions: jpg, jpeg, png, gif

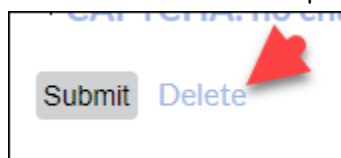


Recent Feedback

enquir³
RESPOND • RETAIN • REFER

Great massage

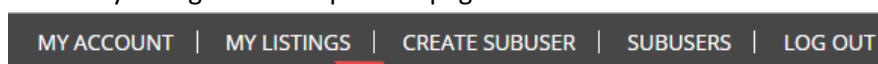
11. When you have finished click submit
12. If you decide you want to delete the feedback click the delete button next to submit
On the next screen click 'permanently delete' (this will reduce the junk on the system)



Editing a listing

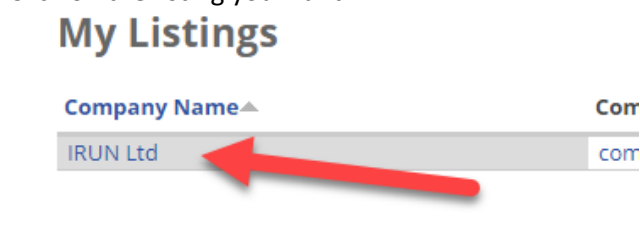
The details of the listing can be changed, you can only change listings that appear in your 'my listings' section

1. Go to 'my listings' at the top of the page



MY ACCOUNT | **MY LISTINGS** | CREATE SUBUSER | SUBUSERS | LOG OUT

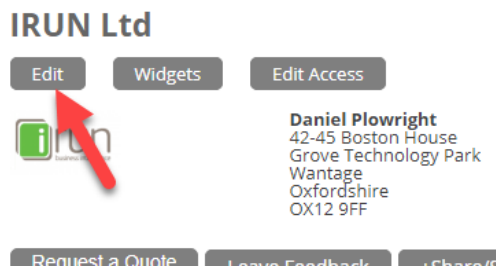
2. Click on the listing you want



My Listings

Company Name ▲	Corr
IRUN Ltd	com

3. Click 'edit' under the title

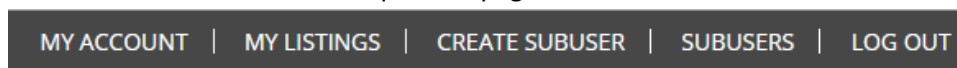


4. Amend the details as you see fit and then click 'submit' at the bottom of the page

Creating subusers

You have the ability to create subusers of your account, this means they will have access to everything you do

1. Go to 'create subuser' at the top of the page



2. Click on 'add user'



3. Fill in all the details as requested
for the roles section tick both 'individual member editor and individual member feedback editor (this means they can do the same as you)

Then click 'create new user'

Add user

Username *

Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is used to notify you of certain news or notifications by e-mail.

Password *

Password strength: _____

Confirm password *

Provide a password for the new account in both fields.

Status

Blocked Active

Roles

- authenticated user
- Individual Member Editor
- Individual Member Feedback Moderator
- Notify user of new account

[Create new account](#)