Toolbox

USER GUIDE

FOR BUSINESSES AND COMMUNITY GROUPS

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Basics

Main Tools

Extra Business Tools

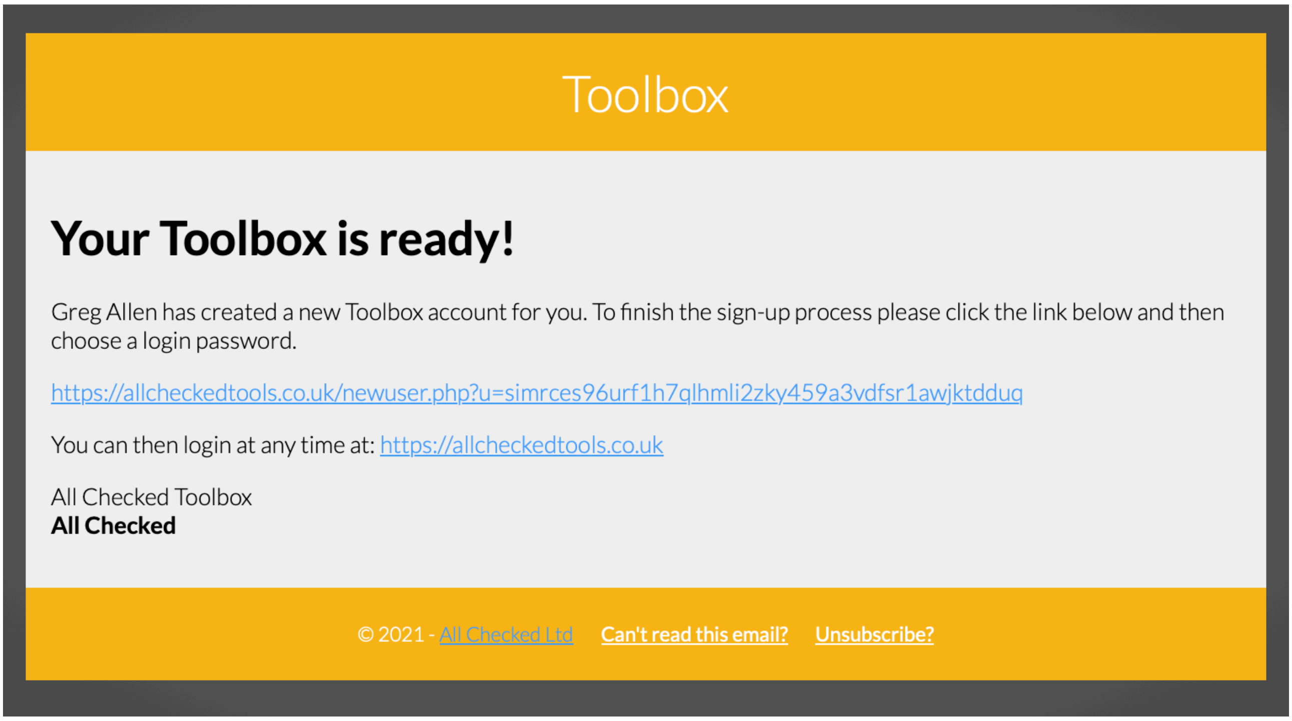
1. Setting a Password

To log in to your Toolbox for the first time, click on the link in the activation email (Fig 1). If you haven't received this, please check your spam/junk folder in your email program.
Otherwise, please contact support@allchecked.co.uk

You will be asked to set your password (Fig 2). The password should have a mix of upper and lower case letters, at least 1 number and be at least 8 characters long.

You can then access your Toolbox.

FIG 1. EXAMPLE ACTIVATION EMAIL.


Toolbox

Your Toolbox is ready!

Greg Allen has created a new Toolbox account for you. To finish the sign-up process please click the link below and then choose a login password.

https://allcheckedtools.co.uk/newuser.php?u=simrces96urf1h7qlhmli2zky459a3vdfsr1awjktdduq

You can then login at any time at: https://allcheckedtools.co.uk

All Checked Toolbox
All Checked

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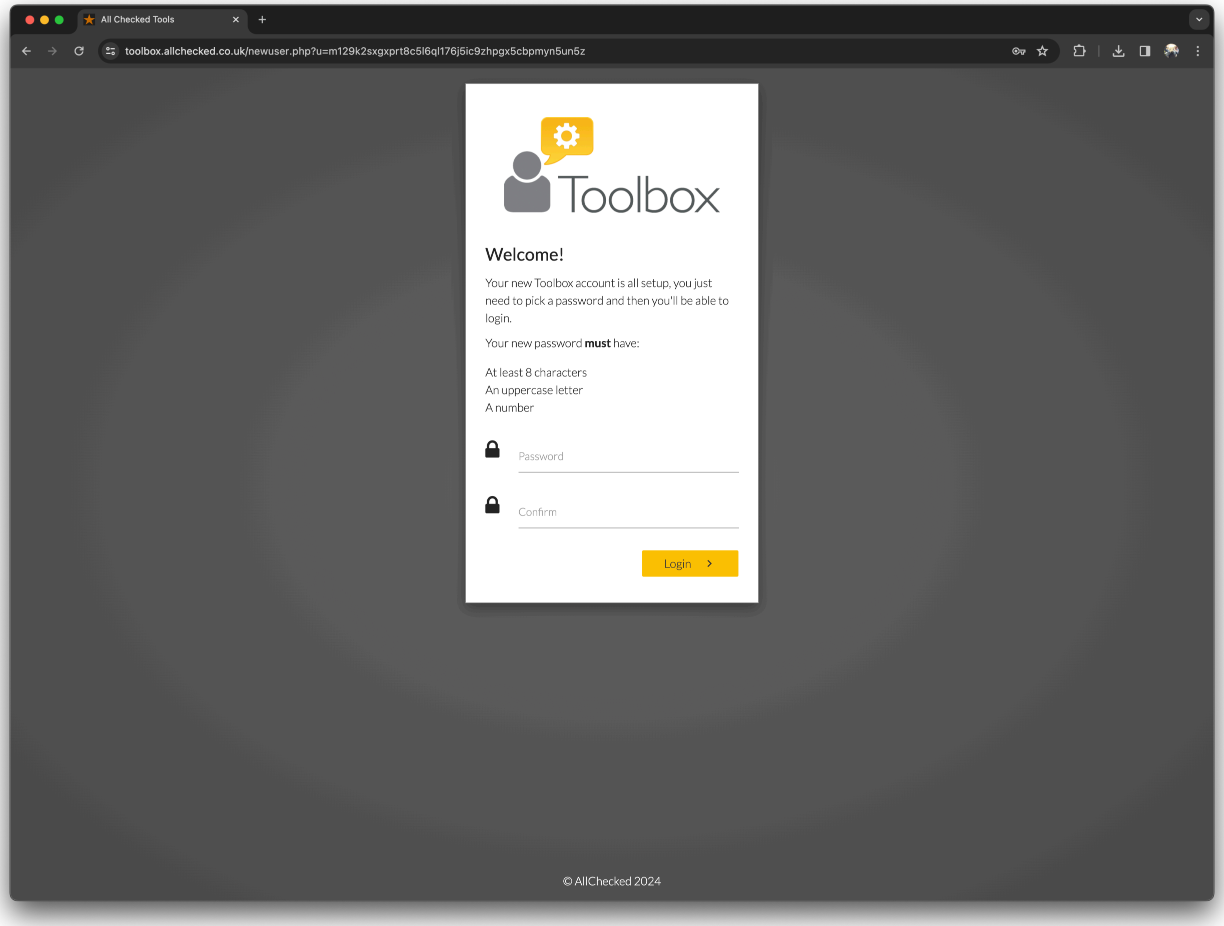
FIG 2. SET PASSWORD

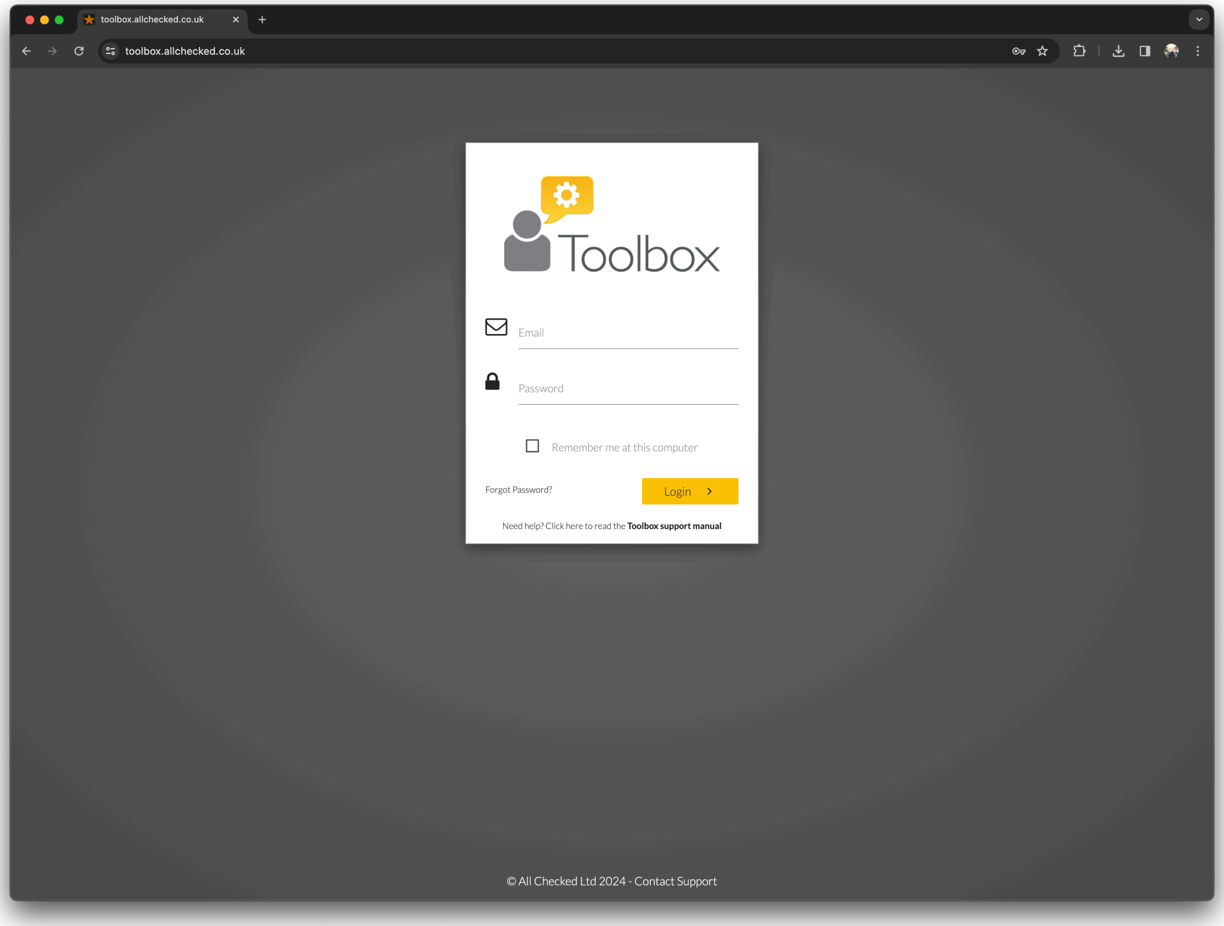


2. Logging in

To log in to your Toolbox, visit https://toolbox.allchecked.co.uk (or select the 'Toolbox' link from https://allchecked.co.uk).

Enter your email address and password (Fig 3).

FIG 3. LOGIN SCREEN



If you've forgotten your password, please click the "Forgot Password" link and follow the on-screen instructions.

If you tick the "Remember me at this computer" box, you'll remain logged in at your computer.

If the login box shakes, this is because you've incorrectly entered your email and/or password. Please try re-entering the information.

3. Home Screen

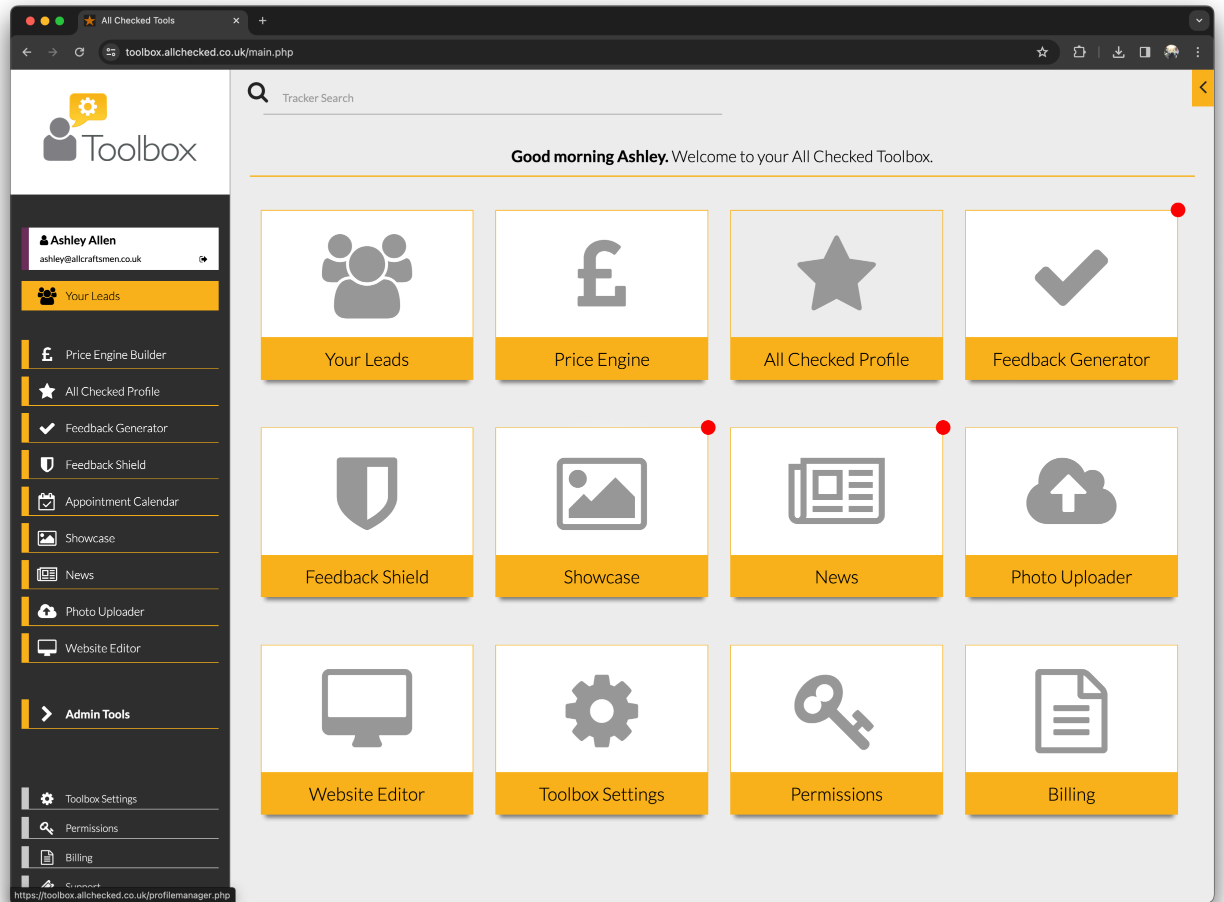
When you've logged in, you'll see the Toolbox home screen (Fig 4).

From here, you can access tools either from the menu on the left column or by selecting the appropriate label from the main screen.

You can view your Toolbox alerts by clicking the arrow in the yellow box at the top right corner of the main screen. The following four Toolbox alerts will appear in the right-hand column:
Help - Select help for information about how to use the tool you're currently working with.
Tasks - Set a task for a colleague or view tasks colleagues have set for you.
Notifications - Notifications (such as new enquiries) can be found here.
Information - Where applicable, you'll find extra data here.

Click the arrow in the yellow box at the top right corner of the screen to hide the alerts.

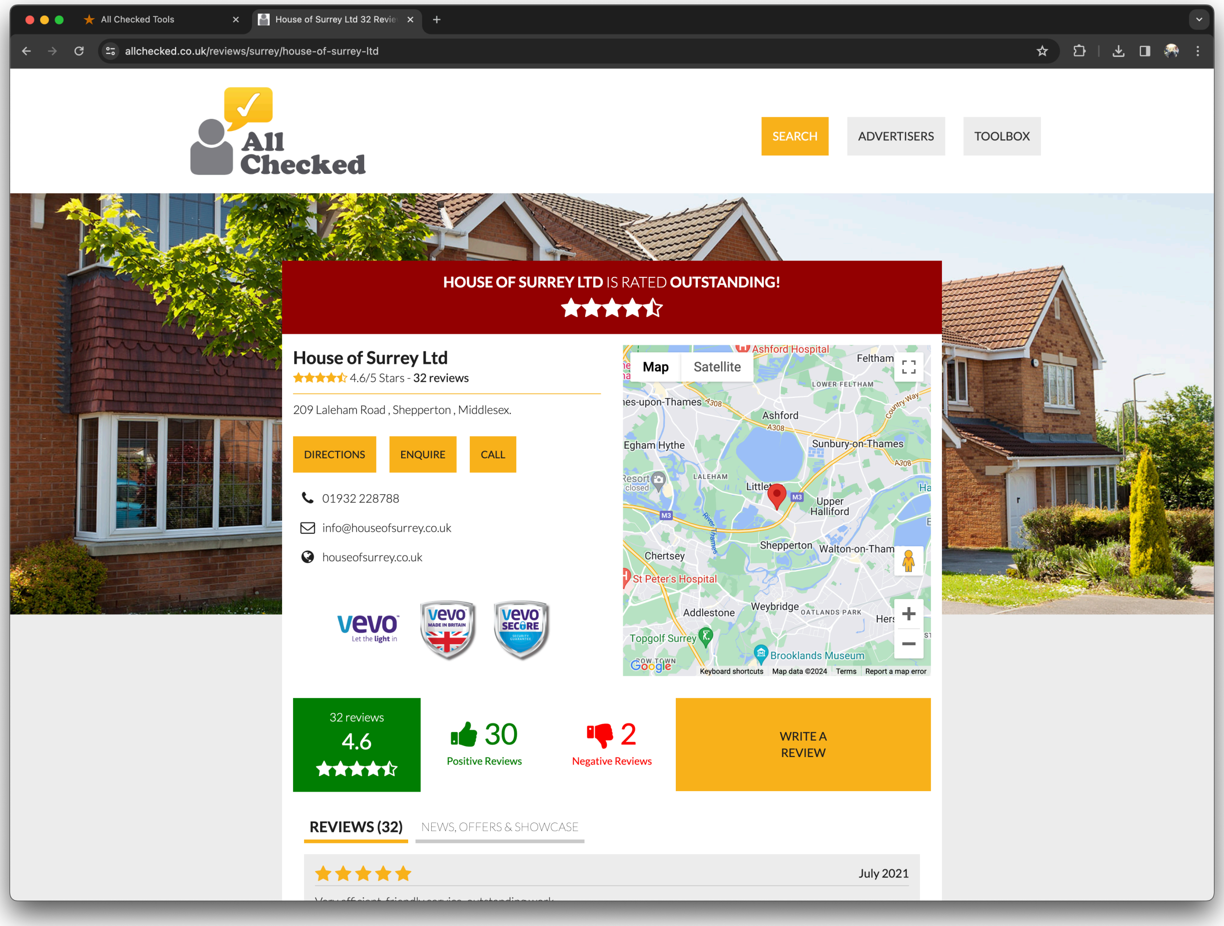
FIG 4. HOME SCREEN



4. All Checked Profile Tool

This is where you can manage your Profile Page on https://allchecked.co.uk

FIG 5. ALL CHECKED PROFILE



View Profile

Select VIEW PROFILE in the top right-hand corner to view your All Checked Profile Page in a new tab.

Main Information

Click on each field to change your organisation name or postcode.

Details

Click on +ADD DETAIL to select a field to add to your Profile Page.
Each field can be deleted using the DELETE button, and you can change the order in which they appear by using the green arrows.

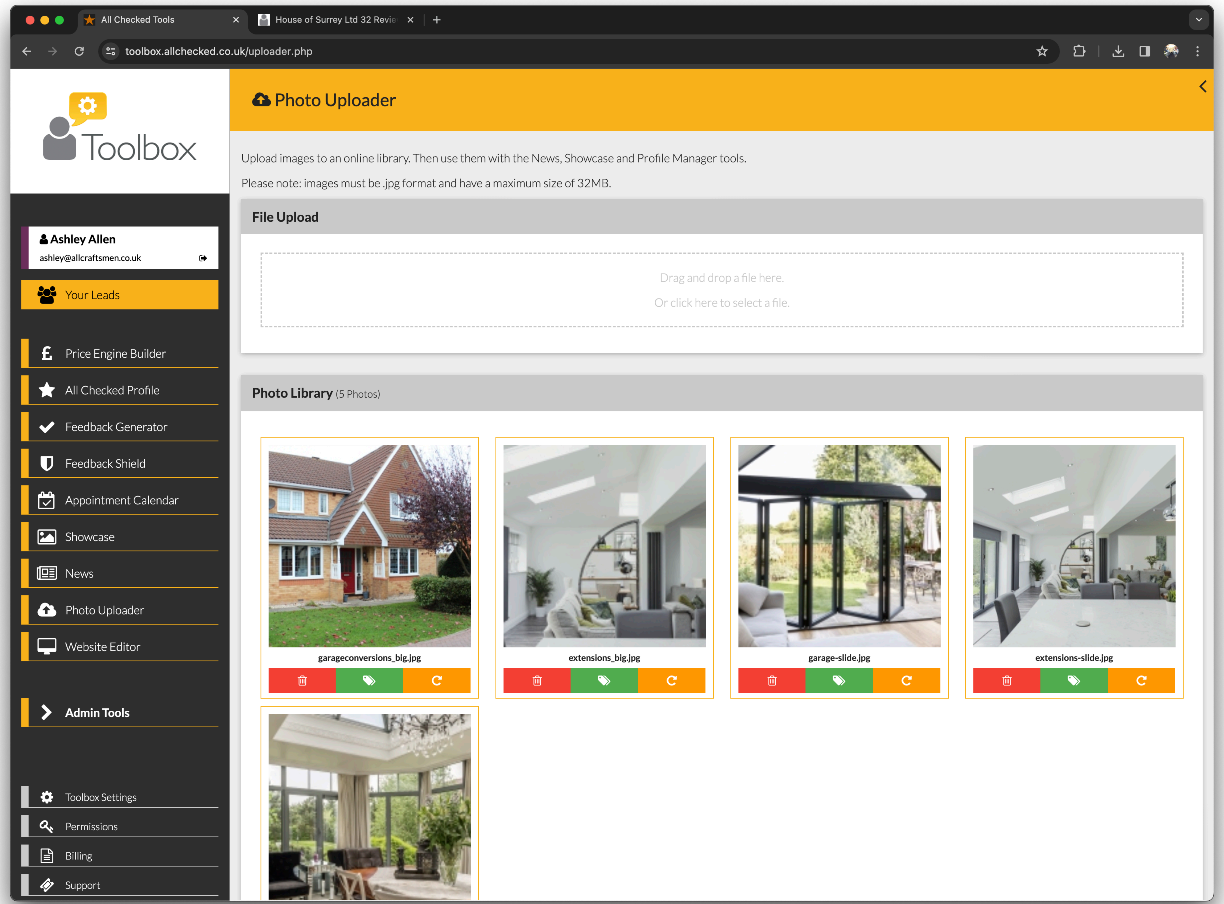
Logo
Click on ADD LOGO to select a logo from your Photo Uploader.

Background
Click on ADD BACKGROUND to select a background image from your Photo Uploader.

5. Photo Uploader

This is where you can upload images to your Toolbox.

FIG 6. PHOTO UPLOADER



You can then use the All Checked Profile Tool or Showcase Tool to upload the image to the appropriate place on your All Checked Profile Page.

File Upload

Either drag and drop a file from your computer into the File Upload area or click on the File Upload area to select a file from your computer.
All images must be .jpg format and have a maximum file size of 18MB

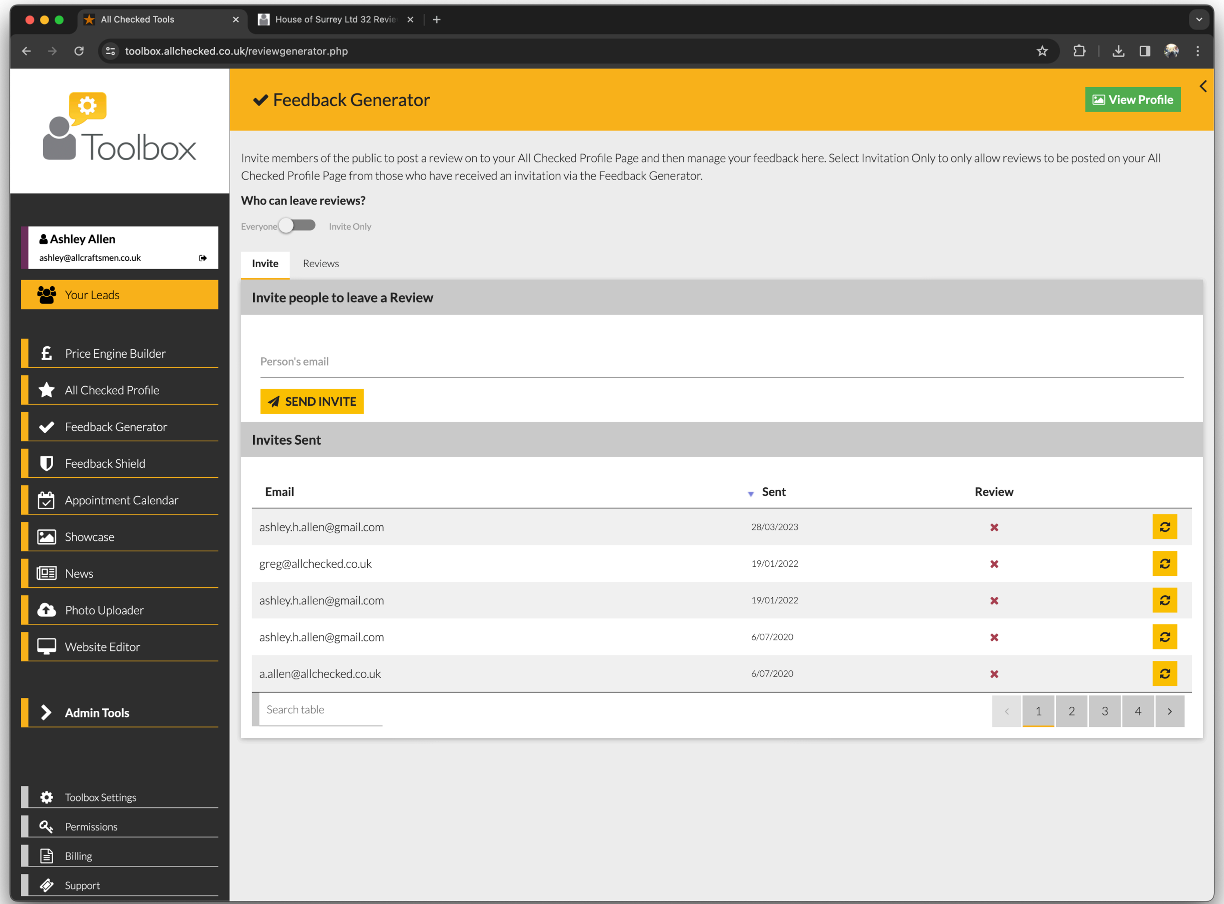
Photo Library

- Select the green symbol to tag an image to make it easier to find later.
- Select the red symbol to delete an image.
- Select the orange symbol to rotate the image to the correct orientation.

6. Feedback Generator

This is where you can manage your feedback.

FIG 7. FEEDBACK GENERATOR



View Profile

Select VIEW PROFILE in the top right-hand corner to view your All Checked Profile Page in a new tab.

Who can leave reviews?

It's standard practice to allow anyone to leave a review on your Profile Page, but you can use the 'Invite Only' switch to restrict the facility to invitation only, thereby prohibiting unsolicited feedback.

Invite members of the public to leave a Review
You can send an invitation to any member of the public to post feedback simply by entering their email address in the field provided. There's no limit to the number of invitations you can send.

Invites Sent
This is a list of the invitations sent, in date order.
You can change the order from most recent first to oldest first by clicking the heading at the top of the Sent column.

Search
You can search for an invitation by entering all or part of the email address into the Search field at the bottom of the list.

Status
The Review column will display a green tick when feedback has been provided by the reviewer.

Resend
Select the yellow resend link to resend the invitation.

Reviews
This is where you can view published feedback.

- Select DELETE to remove the review.
- Select ADD PHOTO to add a photo to the review.
- Select REPORT to report the review if you're unhappy with it.
- Select RESPOND to add your comments to the review

7. Feedback Shield

Blocked Reviews

Any obvious hoax, malicious or unfair reviews will be automatically blocked by the Feedback Shield.

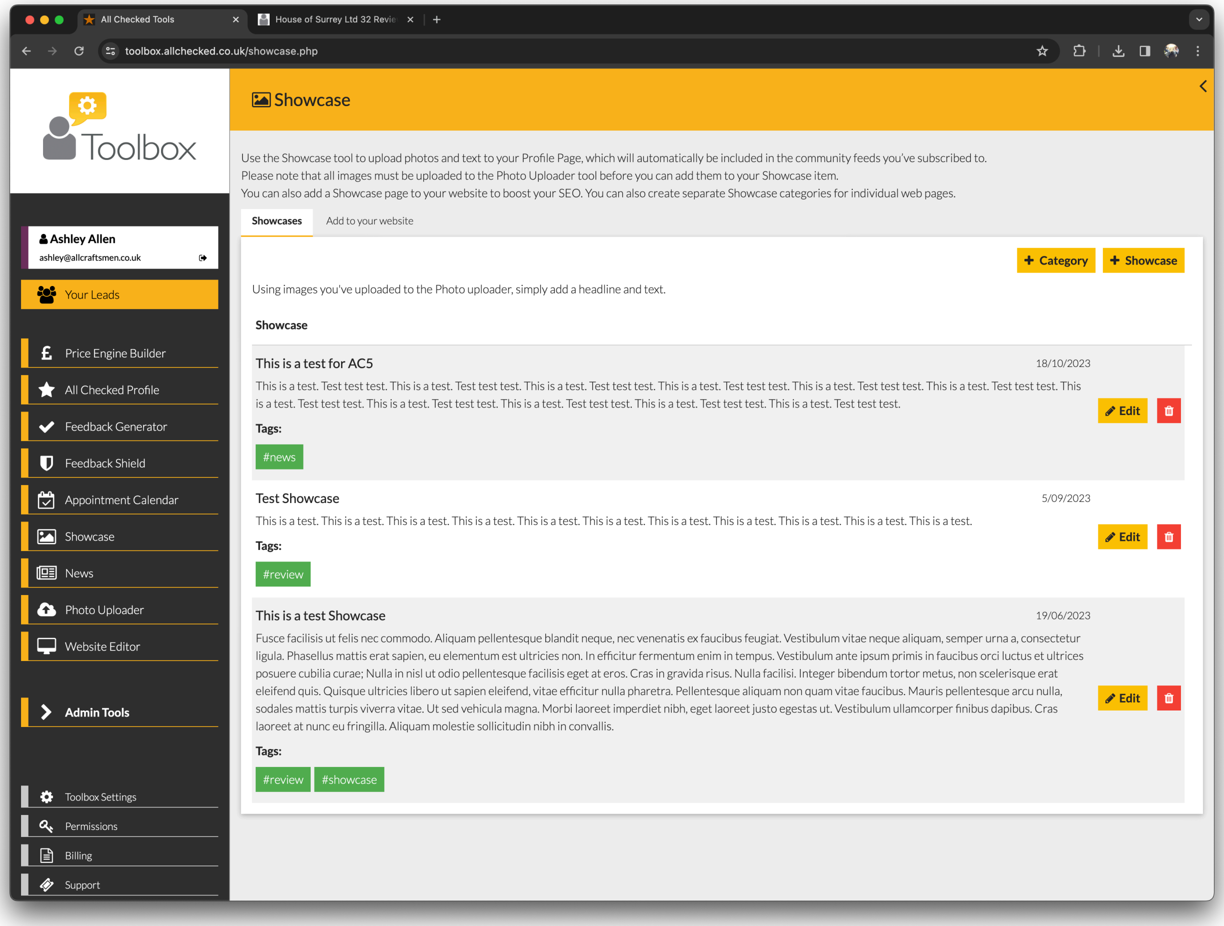
Reviews under investigation

If we've automatically blocked a negative review for investigation, and you know it's genuine, you should contact the reviewer to resolve any issues privately to avoid later publication. If the reviewer can prove their claim and you refuse to act, we're legally obliged to publish the review.
Remember: you can also use the Feedback Generator tool to add your comments to any review.

8. Showcase

Use this tool to post photos, news, offers and events to your All Checked Profile Page.

FIG 8. SHOWCASE



To add an activity, news, offer or event:

- Select + ADD SHOWCASE
- Click on the HEADLINE field to add a title
- Click on the BODY field to enter your text
- Select the photo(s) from your library (PHOTO UPLOADER) to display in your post
- Select ADD SHOWCASE to finish
- You can edit or delete posts using the appropriate buttons.

Add to your website

If you'd like to upload your posts to your website as well, you can add a Showcase page here.

- Click on the ENTER YOUR WEB DESIGNER'S EMAIL ADDRESS HERE to enter your web designer's email address
- Select SEND CODE to send the code

9. Toolbox Settings

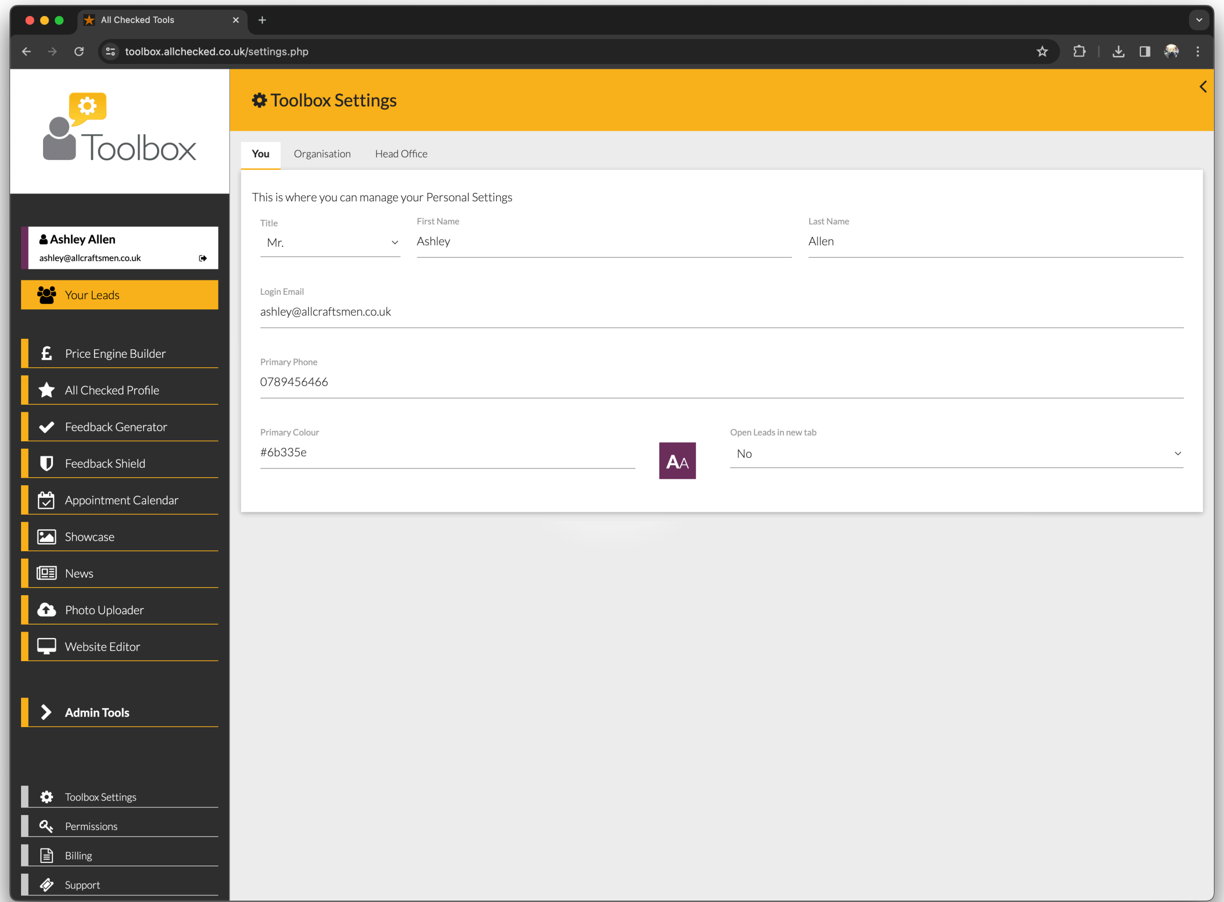
This is where authorised users can manage the Toolbox Settings.

You

This is where you can amend your personal details.

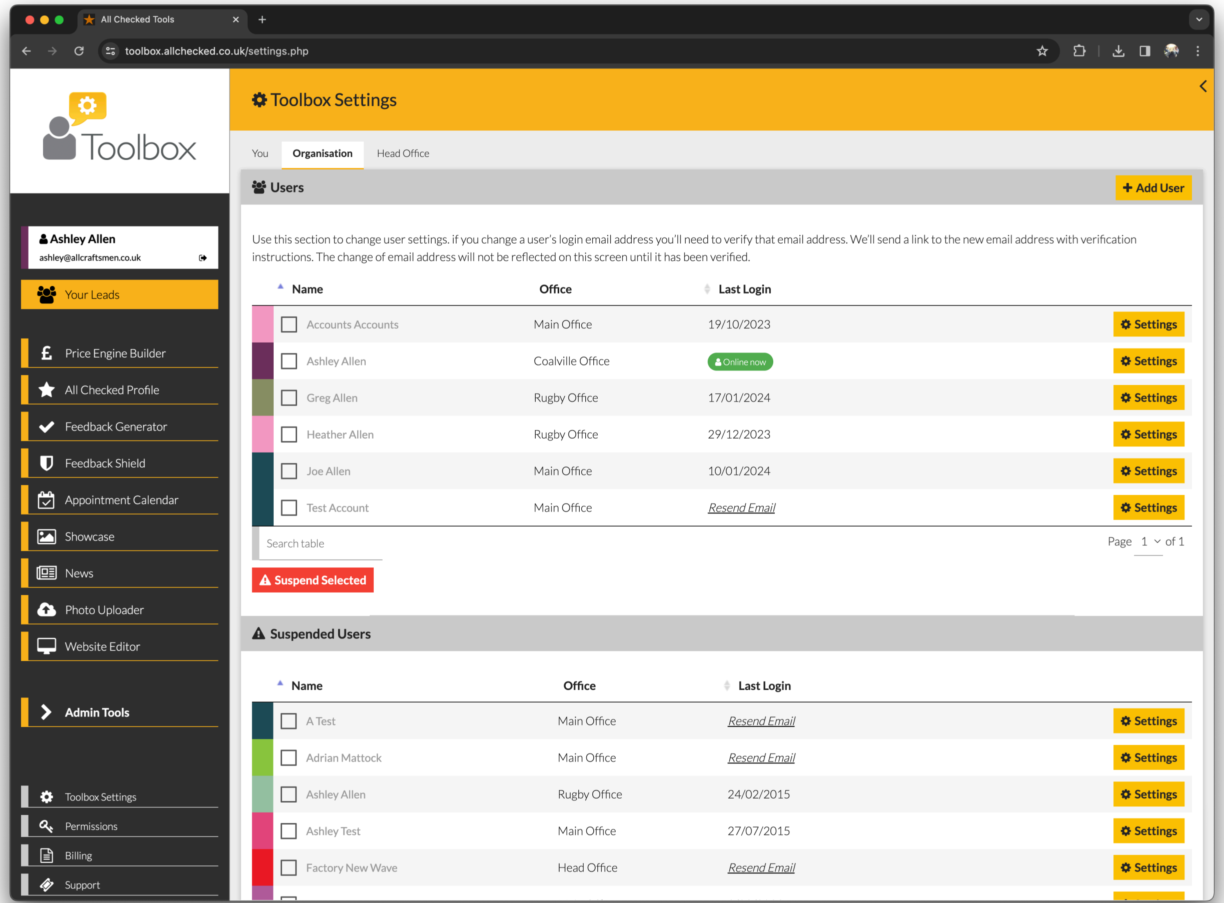
- Select a field to get started.
- Choose a Primary Colour to personalise your experience
- Add a picture to your profile (if you like) by dragging an image into the PICTURE area, or by clicking on the PICTURE area to select a file from your computer.

FIG 9. TOOLBOX SETTINGS, YOU TAB



Organisation
This is where the main contact can set up and manage Toolbox users for your organisation.
Users
You should set up an individual account for each person using your Toolbox.

FIG 10. TOOLBOX SETTINGS, ORGANISATION TAB



To add a new user:

- Select +ADD USER.
- Select the OFFICE where you want to attach the new user.
- Click on each field to add the user's personal details.
- Click POSTCODE to enter the postcode, and then Click FIND ADDRESS to add the address.
- Select ADD NEW USER to finish.
- The new user will receive an email asking them to set their password.

To edit a user's details:

- Select the appropriate USER SETTINGS link on the User Chart to change the details of an existing user.
- Click on the fields you want to change.
- Select SAVE SETTINGS to finish.

You can suspend and reinstate users at any time.

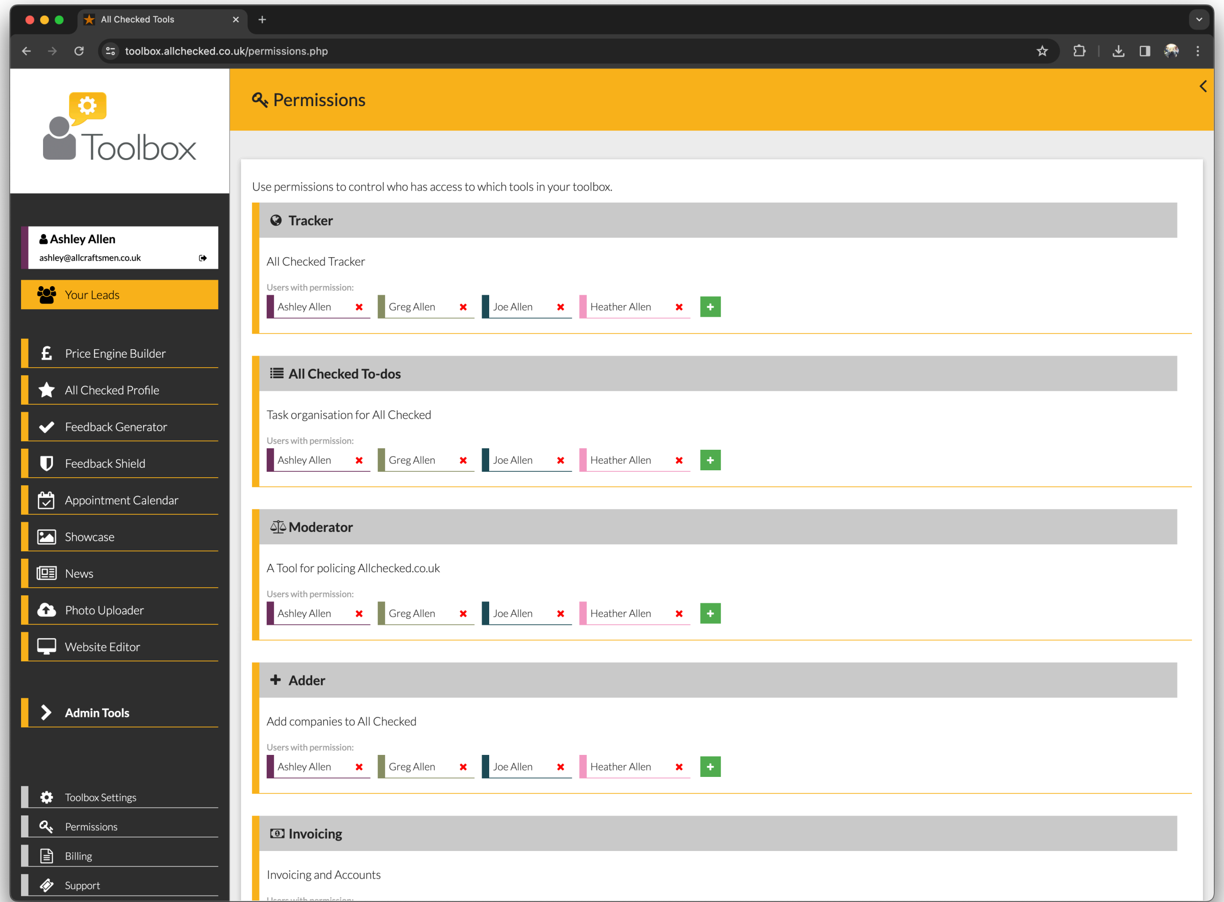
10. Permissions

Use this tool to decide what actions are available to the Users you control.

To give a user a permission:
Use the + button to add a user from the drop-down list of available users

To remove a permission from a user:
Use the x by a user's name to withdraw a permission from a user.

FIG 11. PERMISSIONS



11. Billing

This is where you can view any charges associated with your Toolbox.

12. Your Leads

This is your lead management area where you can deal with any enquiries that you generate.

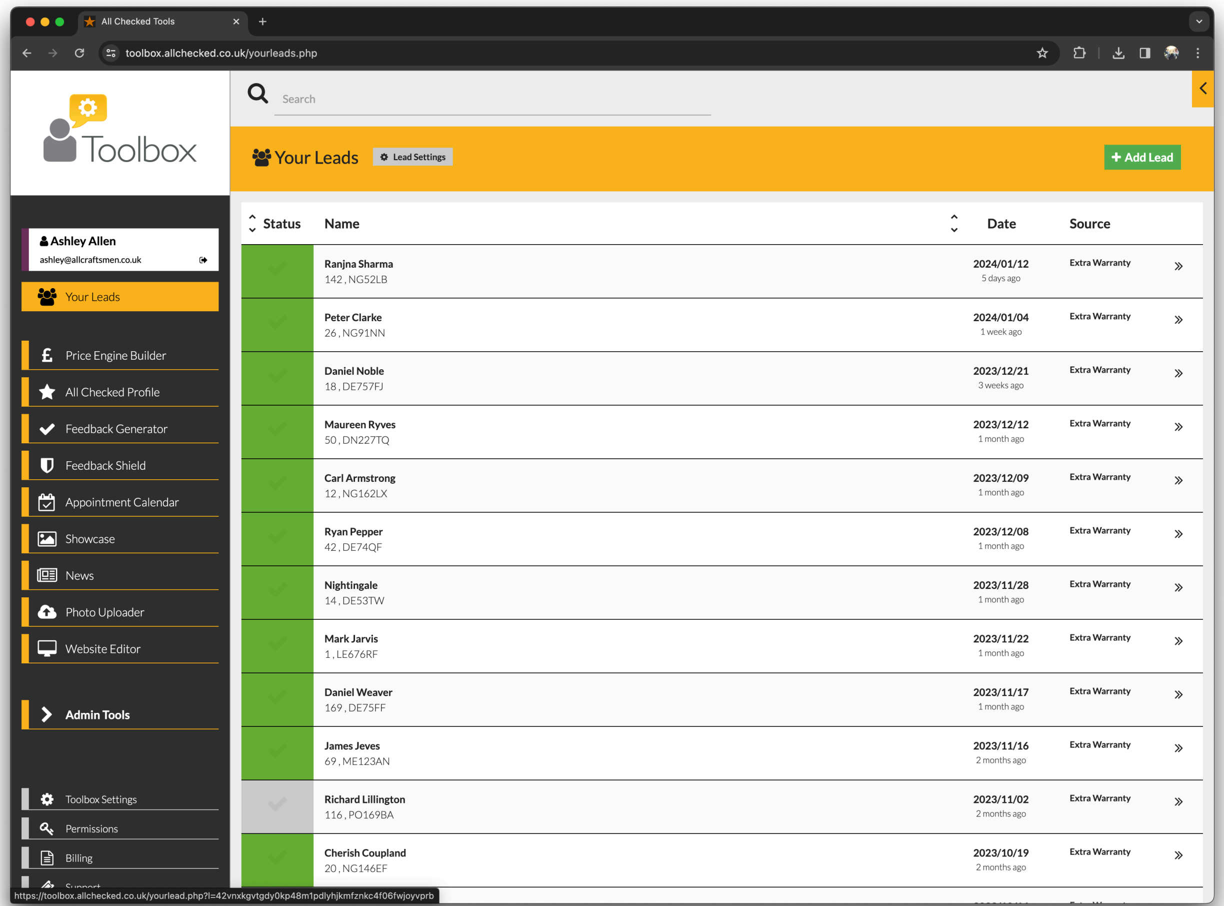
Use this area to:

- Manage Your Leads
- Manually Add Leads to your database
- Monitor performance

On the main screen you will see a list of your recent leads. You can sort your leads by status, name, date or source by clicking the headings at the top of each column.

Click the heading again to reverse the list (e.g. Z to A instead of A to Z). Alternatively, begin typing a customer's name or address in the Search field at the top of the page to locate them.

FIG 12. YOUR LEADS, LEAD LISTING

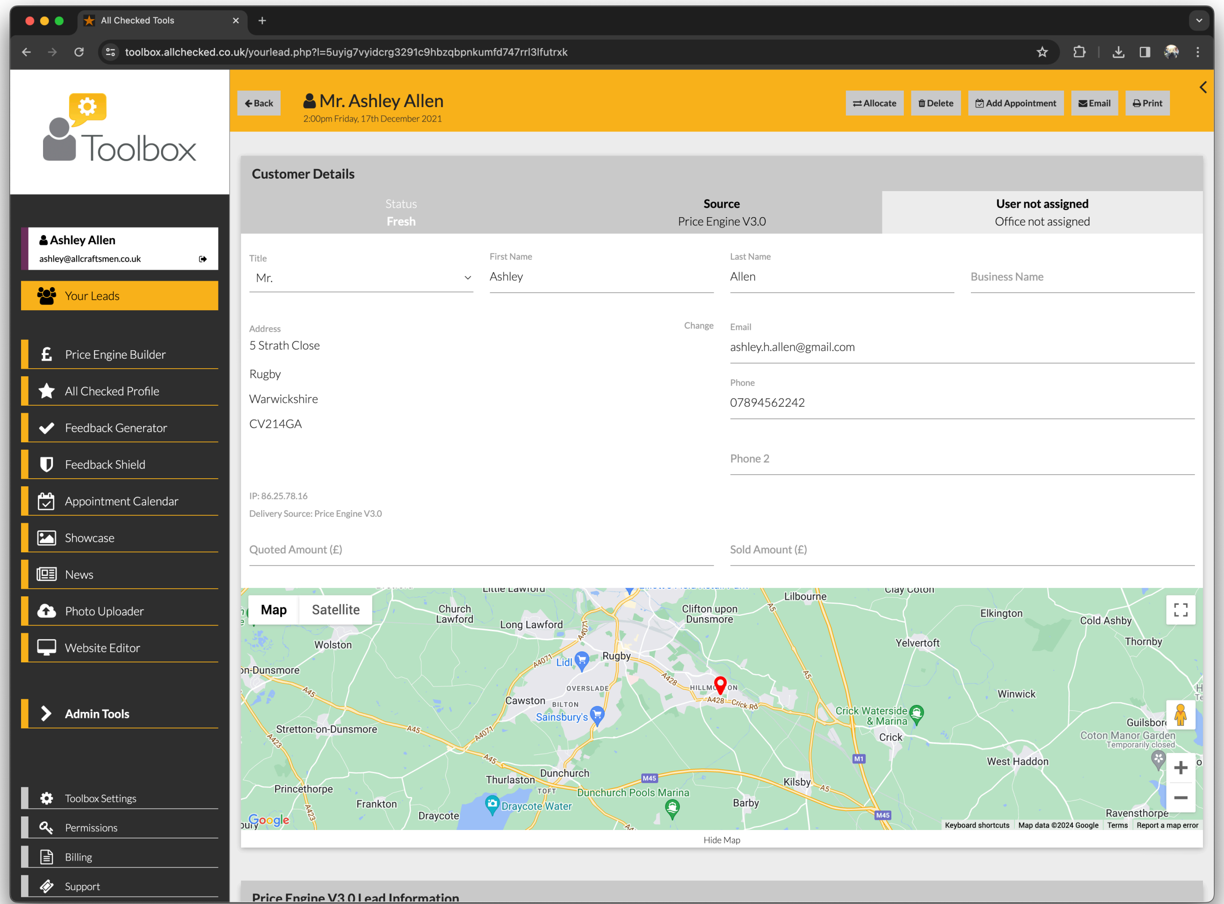


To add a lead manually:

- Select + ADD LEAD to add a new lead
- Click on each field to add the customer details
- Click POSTCODE to enter the postcode and then select FIND ADDRESS to add the address.
- Click SOURCE to select the lead source from the drop-down menu
- Click STATUS to select the enquiry status from the drop-down menu
- Select ADD NEW LEAD to finish

To view a lead in more detail, click on the lead listing. You'll then see the detailed lead view (Fig 10).

FIG 13. YOUR LEADS



Lead Details

At the top of the page, you will find the enquirer's name and the date the lead was generated, along with options to print or delete the lead.

Deleted leads can still be recovered by selecting the "VIEW DELETED LEAD" button in the right-hand column on the Your Leads listing screen.

The header of the lead contains the lead status, source and which user/office it is assigned to. Authorised users may select the edit pencil icon to change the status, source or assignment of the lead.

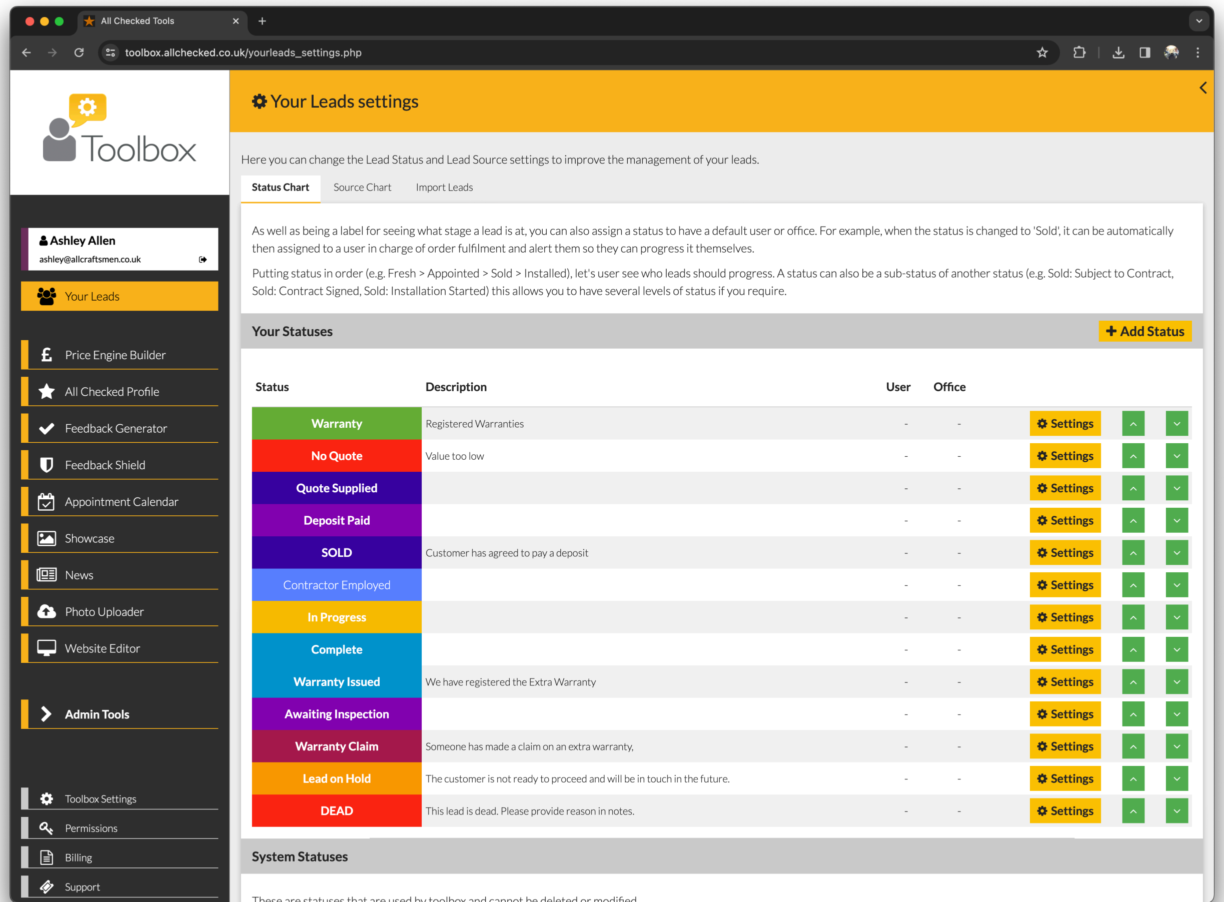
Below the header are the lead details, where users can enter/correct information, view any additional information supplied with the lead and add notes if needed.

To add a note, simply click the ADD NOTE button.

Lead Settings

You can change or add new lead statuses and/or sources by clicking the 'LEAD SETTINGS' button

FIG 14. LEAD SETTINGS (STATUS CHART)



Statuses can be used to update and track the progress of each lead. Sources help you keep track of how you generated a lead and can help you measure performance.

To add a new status:

- SELECT + ADD STATUS to set up a new lead status.
- Click STATUS NAME to label the status (e.g. To Be Appointed)
- Click DESCRIPTION to add more information (if required).
- Click SUB STATUS OF to assign the status to a group (e.g. Fresh).
- Click COLOUR to easily identify the new status. You may want to choose a colour to associate it with another status or to define it as a separate status.
- Add a DEFAULT USER if you want to always assign a status to one person.
- Add a DEFAULT OFFICE if you want to always assign a status to one office
- Click INSERT STATUS to select its position on the Status Chart.
- Select ADD STATUS to finish.

Select the green arrows to move a status up or down the Status Chart, so that you can group statuses together and in the right order.

To edit a status, click the “SETTINGS” button next to the status you want to change.

To add a source:

- Select + ADD SOURCE to set up a new lead source.
- Click SOURCE NAME to label the source.
- Click DESCRIPTION to add more information (if required).
- Click SUB SOURCE OF to assign the source to a group.
- Select ADD SOURCE to finish.

To edit a source, click the “SETTINGS” button next to the source you want to change. Delivery sources are automated and cannot be changed.

Generating Reports

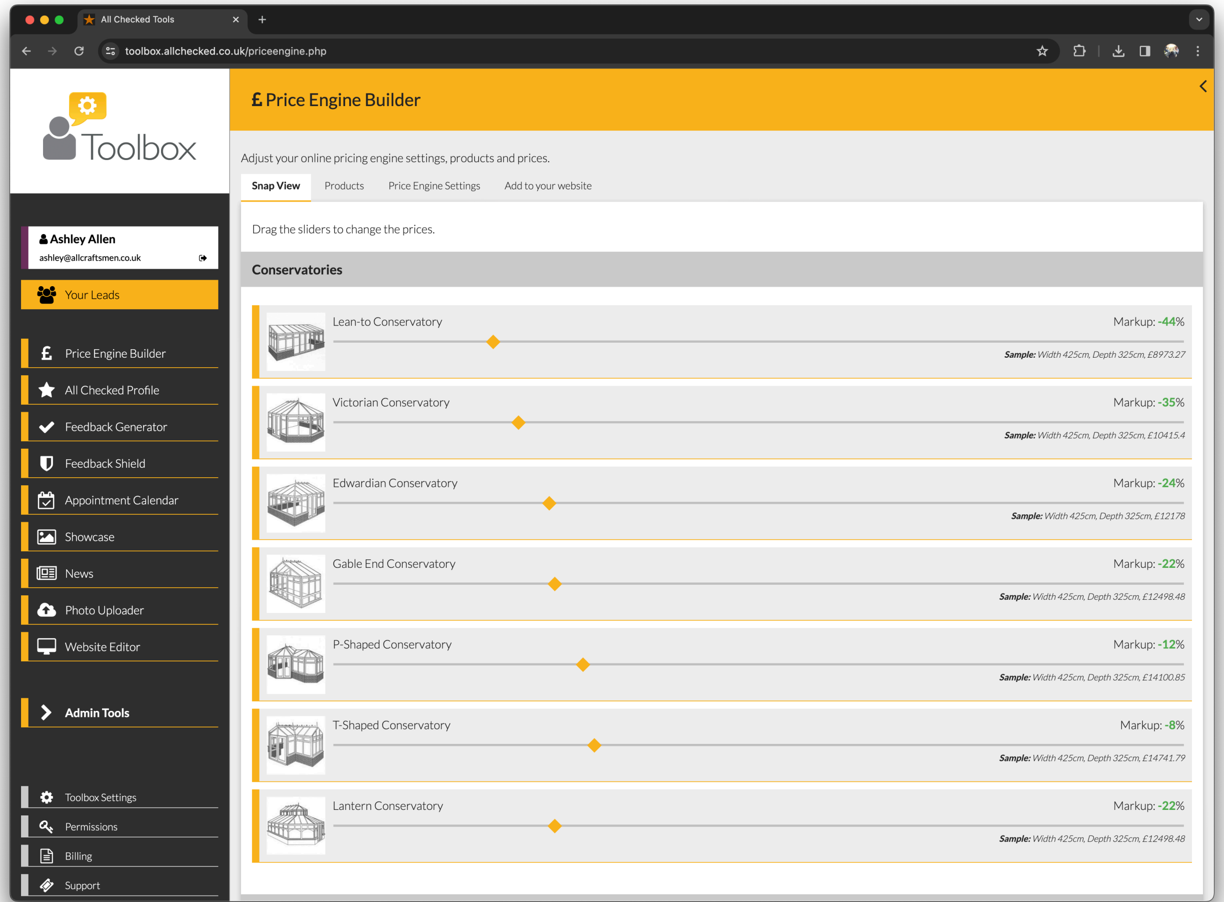
You can use the “YOUR LEADS” tool to generate reports. From the Lead listing screen, click the “GENERATE REPORT” button in the right-hand column. Then select a date range and report type. Click “GENERATE REPORT” to get the report requested.

13. Price Engine Builder

Use the Price Engine Builder tool to configure and manage your Price Engine. There are 4 tabs in this tool.
Snap View - Giving you simple price adjustment for all your products. Products - To manage all the products you have in your Price Engine.
Price Engine Settings - Where you can alter settings such as currency.
Add to your website - Use this tab to send the code to your website designer.

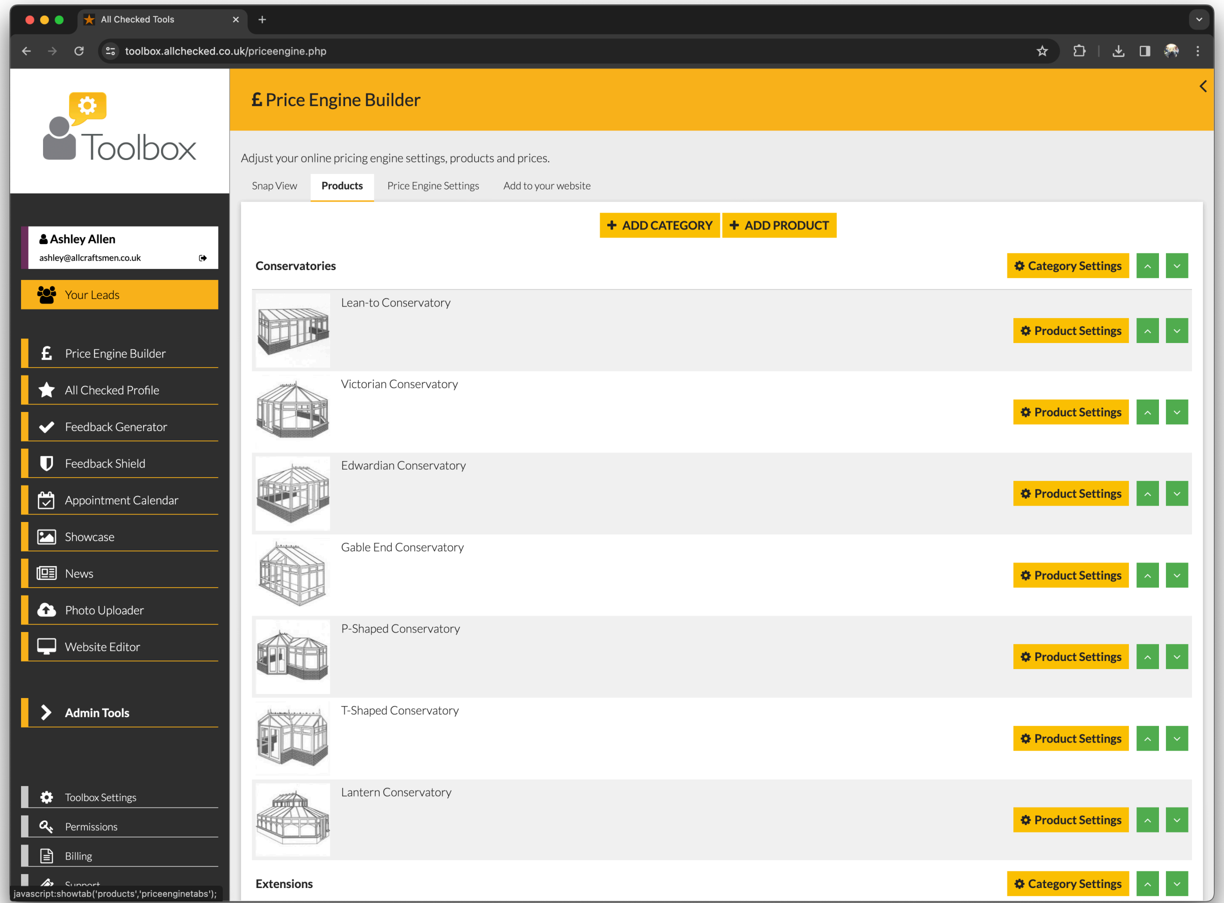
Snap View
You can adjust your prices instantly by moving the slider by each product. A sample is displayed below the slider so you can see the effect of your adjustments.

FIG 15. SNAP VIEW



Products

FIG 16. PRODUCTS VIEW



To add a Category:

- Your PRICE ENGINE can price anything you like. Start by adding a category (e.g. windows, doors, garage conversions). Each new category will appear on your products list. You can add as many categories as you like.
- Select +ADD CATEGORY to add a product category
- Click CATEGORY NAME to enter the name of your product
- Select ADD CATEGORY to finish

To add a product:

This is where you can add products to a category. New products will be displayed in your products list under the relevant category.

There are plenty of template product ranges pre-installed into your Toolbox, and you can select and edit any of them, or you can create your own.

- Select the individual product from the drop-down list and then select the category you want to attach it to.
- Then select ADD NEW PRODUCT to finish.
- To add all template products within a category, select the category name from the drop-down list and then select the category you want to attach it to.
- Select ADD NEW PRODUCT TAB to finish.

Arranging Categories:

You can move categories up and down the Product List using the green arrows on the right of the Category Heading.

Category Settings:

- Select CATEGORY SETTINGS next to the Category Heading to change the category name.
- Click PRODUCT CATEGORY NAMES to enter the new name of the product category.
- Select SAVE to finish.

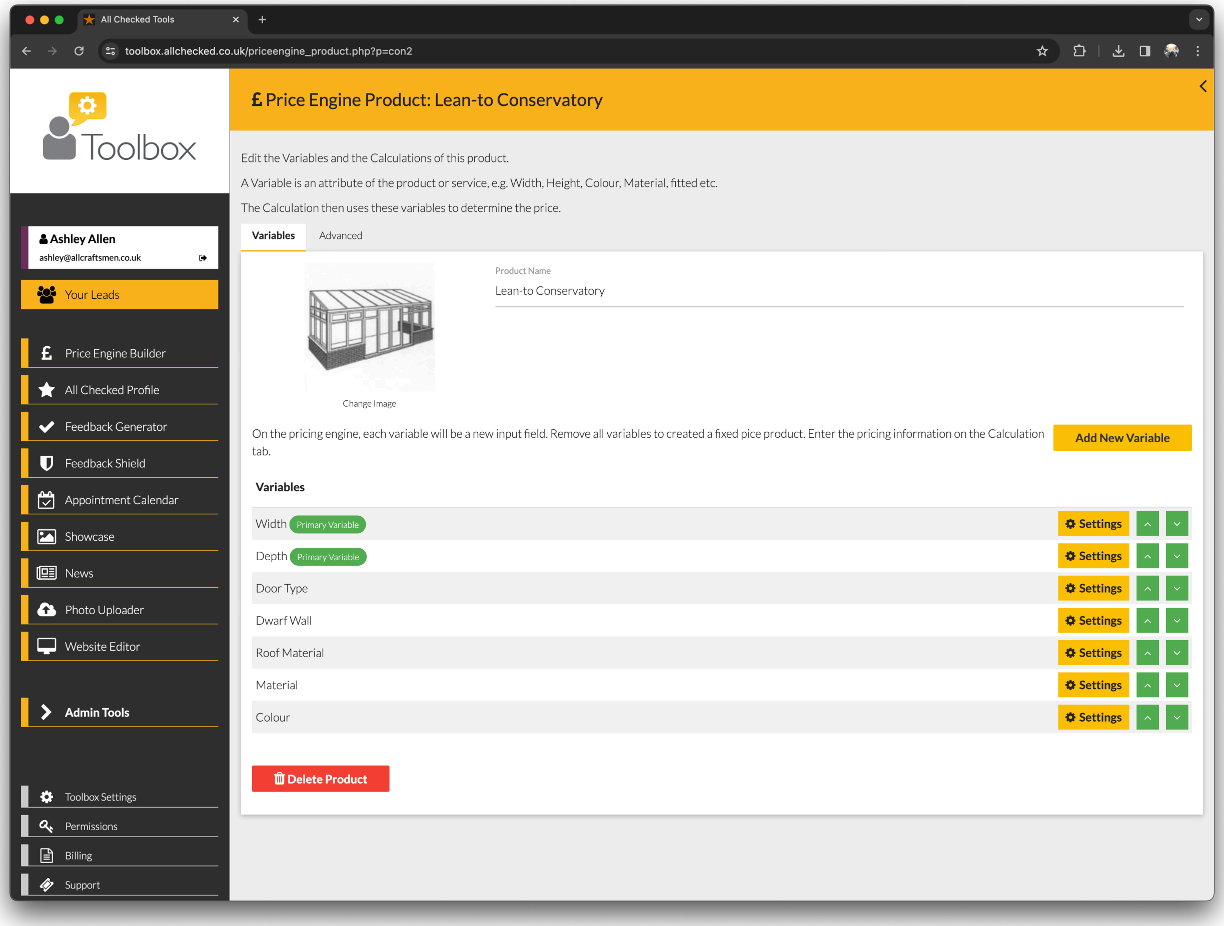
Arranging Products:

You can rearrange the products within a category using the green arrows on the right of each product.

Product Settings:

Select PRODUCT SETTINGS next to the product you'd like to edit. This will take you to the product's setting page where you can edit all the various elements of the product and set individual pricing controls.

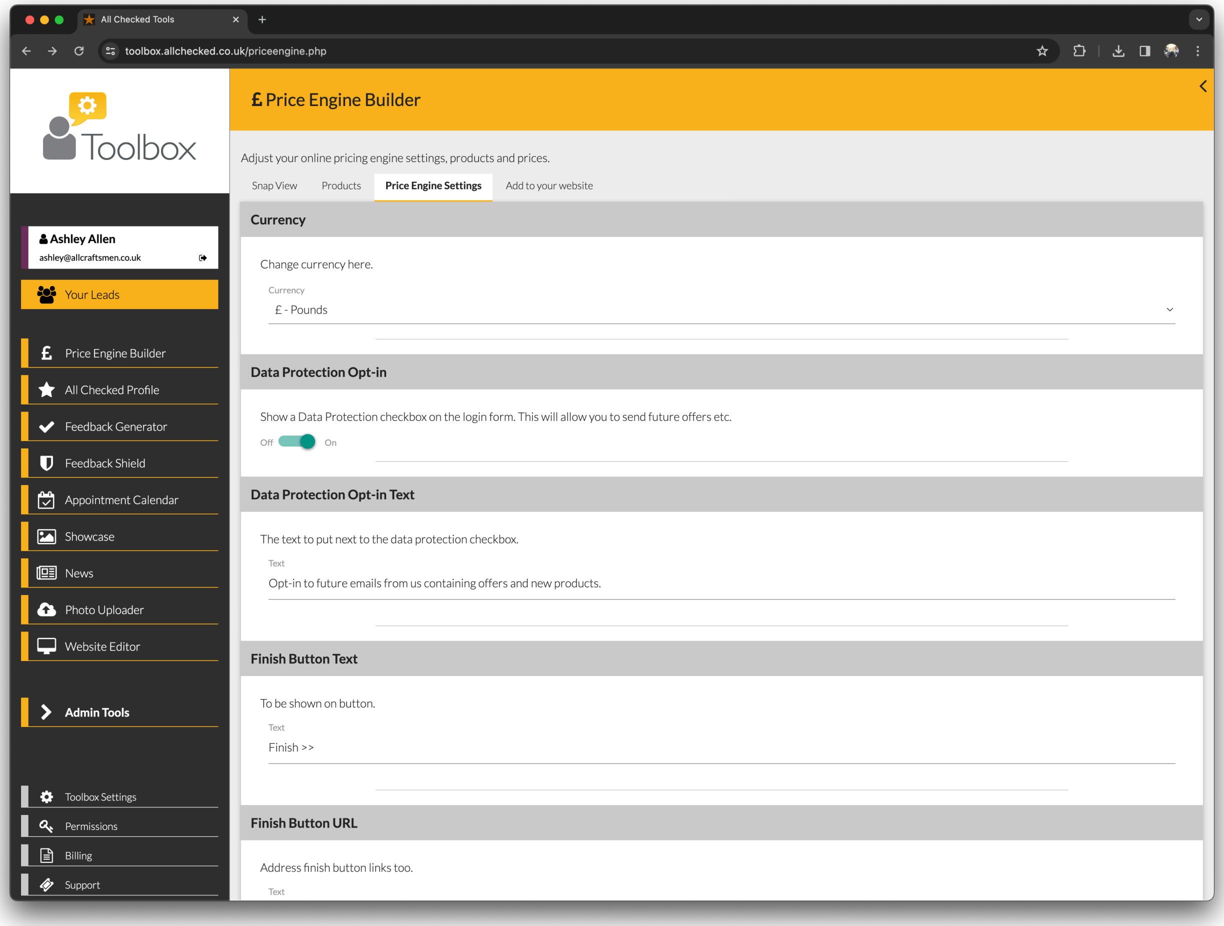
FIG 17. PRODUCTS



Price Engine Settings

This is where you can edit what the customer sees when they use the PRICE ENGINE.

FIG 18. PRICE ENGINE SETTINGS



CURRENCY:
To change the currency, select from the drop-down list.

DATA PROTECTION OPT-IN
You can choose to show an opt-in checkbox here.

DATA PROTECTION OPT-IN TEXT
You can compose your message here.

SHOW GDPR TEXT ON THE LOGIN FORM
You can choose whether or not to display this information.

SHOW THE LOG-IN FORM BEFORE ALLOWING CUSTOMERS TO GET A PRICE:
If you turn this OFF, website visitors will be able to get an online price without leaving their contact details. THIS MEANS YOU WON’T GET ANY LEADS!

INTRODUCTORY TEXT:
Click HEADLINE to enter a new headline for your introductory text.
Click BODY to enter new introductory text.

REGISTRATION FORM TITLE
You can compose your title here.

REGISTRATION FORM SUBTITLE
You can compose your directions to the customer here

HIDE PRICES
You can choose not to display the prices.
SHOW INDIVIDUAL PRICES
You can choose to display individual prices or just the grand total.

PRICE BLUR:
You can set your Price Engine to show a price range instead of a fixed price. Simply enter the required % range either side of the fixed price. For example: if you enter 10 and the fixed Price is £500, the Price Engine will display £450-£550 instead.

QUOTE PREPEND:
Quote prepend is the introduction to the price (e.g. We can supply and fit for Prices From Maximum price etc.). Click on TEXT to change the Quote Prepend.

PURCHASE TAX:
Click on TEXT to change the purchase tax wording.

BUTTON TEXT
You can decide what instructions to show on the Submit button.

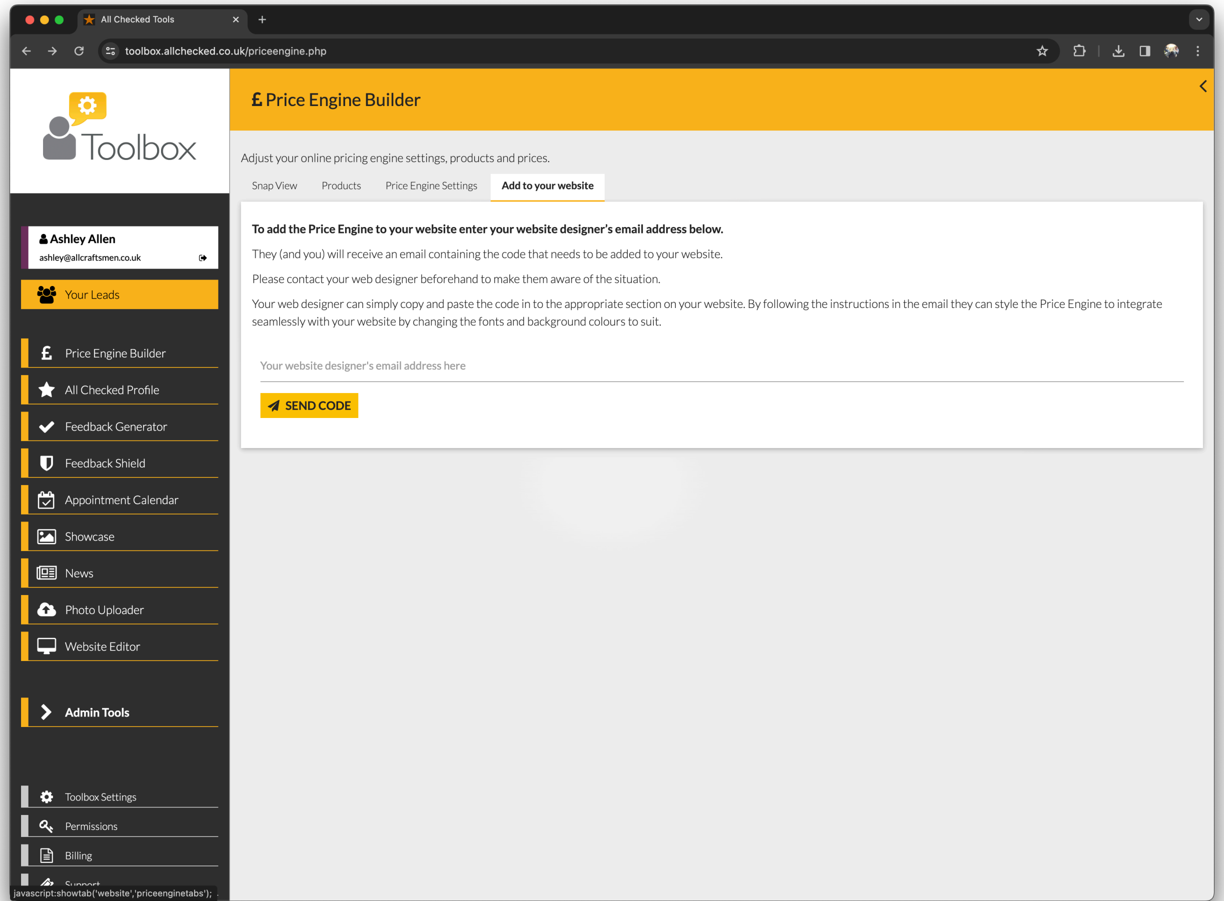
FINISH BUTTON
You can hide the Finish button if you wish

FINISH BUTTON TEXT
You can decide what the Finish button says.

FINISH BUTTON URL
You can choose which part of your website the customer is directed to after clicking Finish.

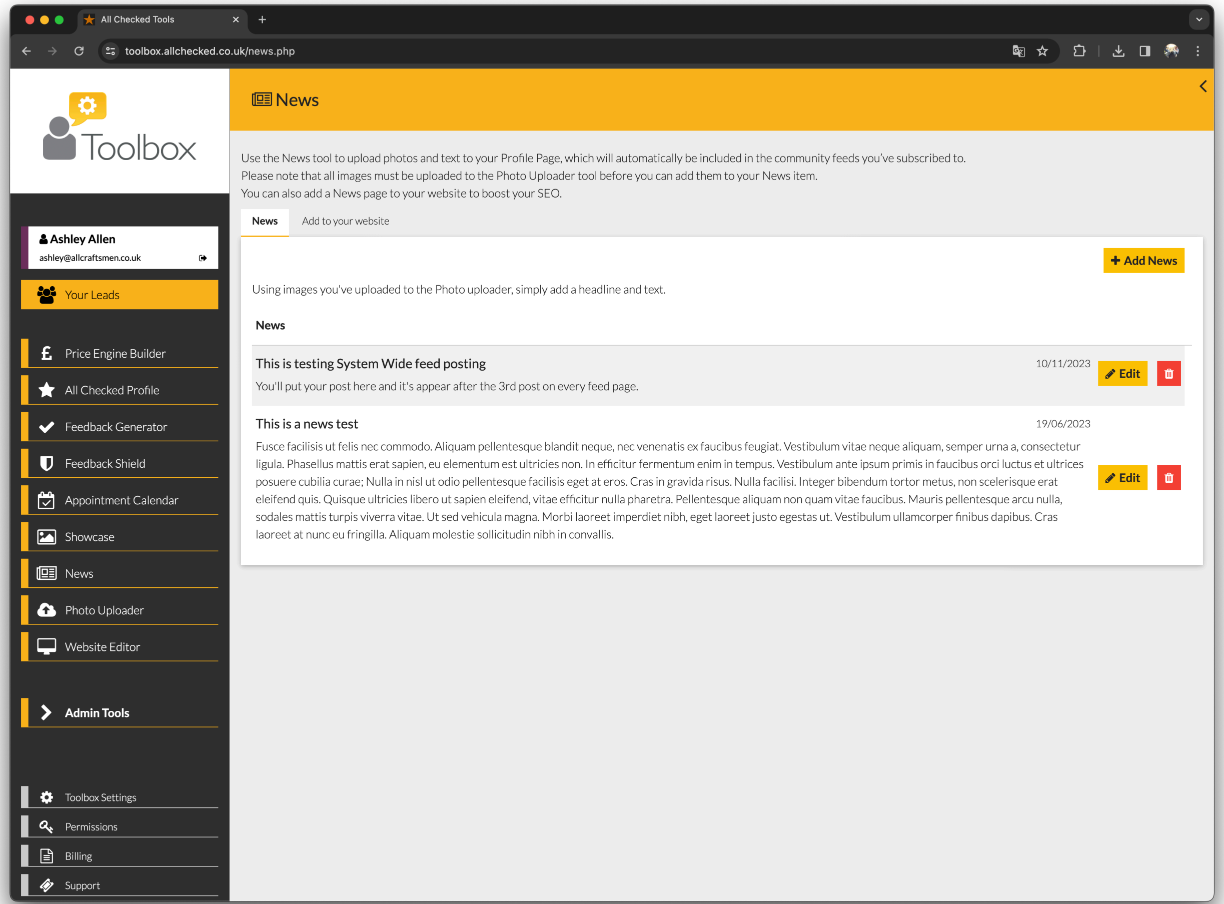
Add to your website
Click on the ENTER YOUR WEB DESIGNER'S EMAIL ADDRESS HERE field to enter your web designer's email address.
Select SEND CODE to send the code. This automated email will include all the instructions your website designer needs to add the price engine to your website.

FIG 19. ADD TO YOUR WEBSITE



14. News Tool

FIG 20. NEWS



To add News

- Select + ADD NEWS
- Click on the HEADLINE field to add a title to your News
- Click on the BODY field to enter your News text
- Select the photo(s) from your library (PHOTO UPLOADER) to display in your News
- Select ADD NEWS to finish

You can edit or delete News using the appropriate buttons.

Add to your website

If you don’t already have an All Checked News Page attached to your website you can add it here.

- Click on the ENTER YOUR WEB DESIGNER’S EMAIL ADDRESS HERE to enter your web designer’s email address
- Select SEND CODE to send the code