DESTINATION CORE

THE DC BUSINESS LOGIN

USER GUIDE FOR WEBSITE ADMINS

BROUGHT TO YOU BY

JACOB BAILEY GROUP™

WWW.DESTINATIONCORE.COM

DESTINATION CORE

WHAT IS THE DC BUSINESS LOGIN?

The DC Business Login functionality provides a password protected area where businesses listed on a DestinationCore website can:

- Submit an update to their **business profile page** (or pages if they have multiple businesses profiles listed on the website)
- Submit, or update other entry types that are related to their business – for example an event or an offer.

All submissions made via the DC Business Login are held in moderation for approval by a Website Admin before being published on the website.

TYPES OF USER OF THE DC BUSINESS LOGIN

Business Admin = a user who is associated with a business, or multiple businesses listed on a DestinationCore website.

Website Admin = a user who is responsible for approving submissions made by a Business Admin.

KEYS TERMS

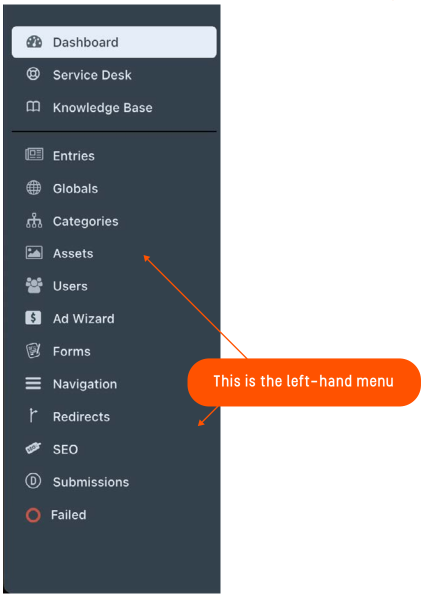
Entry Type = a type of content that appears on the website. For example Events, Offers and Blogs are different entry types.

CMS = Content Management System (NB: a Business Admin will be interacting with the CMS to make submissions).

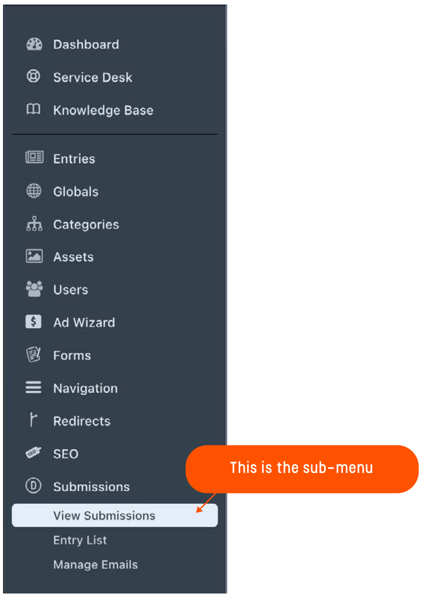
Auto-approve = a status created by a Website Admin against a Business whereby any submissions made by Business Admin associated to that Business will be published to the website without the need for moderation.

NAVIGATING THE BUSINESS LOGIN – REFERENCE TERMS

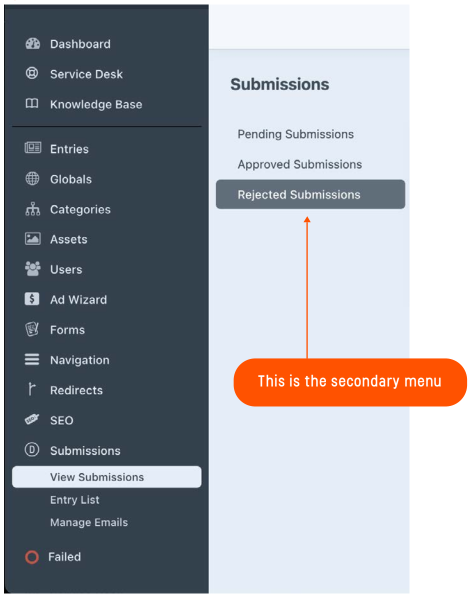
Left-hand menu



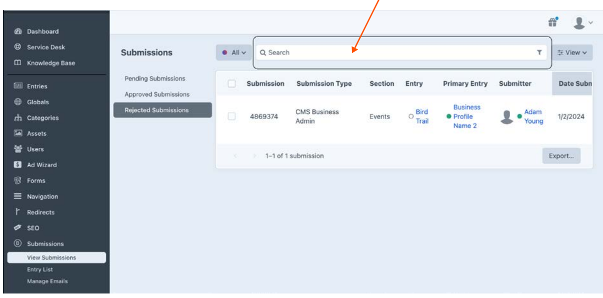
Sub-menu within the left-hand menu



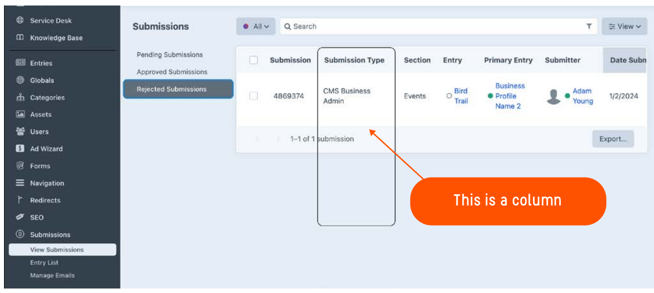
Secondary menu



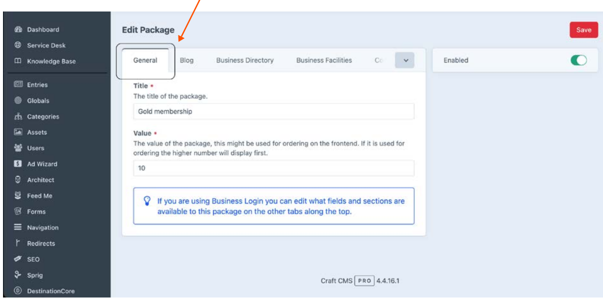
Search bar



Column



Tab



ACTIONS A WEBSITE ADMIN CAN PERFORM USING THE DC BUSINESS LOGIN?

The DC Business Login functionality provides a password protected area where businesses listed on a DestinationCore website can:

- **Create Business Admin Accounts –** create an unlimited amount of Business Admins and assign them to a business or multiple businesses. You can also assign auto-approve on a case-by-case basis.
- **Create Membership Packages –** create an unlimited amount of membership packages, and then select which content fields are available to edit for each package. You can also assign a priority hierarchy to each package – this sets the order the memberships packages are displayed in on the frontend of the website.
- **Review, Approve, Amend or Reject Submissions made by a Business Admin –** see all submissions which have not yet been reviewed from a summary page which includes quick approve and reject buttons.
- **View Previously Approved & Rejected Submissions –** you can view all the previously approved entries including the status, when the entry was last updated, the business it is associated to and the type of submission.
- **Customise the System Email Notifications –** craft customised content for the email notifications which get sent to Business Admins.
- **View a Summary of the Businesses and their Associated Business Login Package –** including the membership package they are assigned, if auto-approve is set up, and the Business Admins assigned to each business.

HOW TO CREATE A NEW BUSINESS ADMIN ACCOUNT

Step 1 – Create Account

You first need to create an account.

- Click 'Users' in the left-hand menu – you'll be presented with a screen of 'All users'.
- Click the red '+ New user' button in the top right corner.
- Fill in the 'Full Name' and 'Email' in the Account tab. Then click the 'Permissions' tab.
- Tick the 'Business Admin' box in the Permissions tab.

Step 2 – Assign Account to Business

After you have created an account, you need to assign the account to a business.

- Click 'Entries' in the left-hand menu – you'll be presented with an 'All entries' screen.
- Click on 'Business Directory' in the secondary menu – a list of all the business profiles will appear.
- Using the 'Search' bar at the top of the page search for the business or scroll the list until you find the business that you want to assign the newly created Business Admin account to.
- Once you have located the appropriate business click on the link under the 'Entry' column.
- Locate and click the 'Submissions' tab.
- Under the 'Business Admins' heading click the '+ Add a user' button – you will then be presented with a pop-up with a list of all the business admin users.
- Using the 'Search' bar at the top of the pop-up search for the business admin or scroll the list until you find the business admin that you want to assign to the business.
- Click on the appropriate Business Admin and the 'Select' button will be highlighted in red.
- Click the 'Select' button – this will then assign the Business Admin to the business.

TOP TIP

A Business Admin must be assigned to a business to be able to make submissions. If they are not, they will be unable to make content submissions. It is important to note that a business admin cannot log into the CMS without having a business assigned to them.

TOP TIP

You can assign multiple Business Admins to a business.

AND

Business Admins can be assigned to multiple businesses if required.

ACTIVATING AUTO-APPROVE

If you want to activate auto-approve for a business, you can do this by activating the 'Auto Approve' toggle at the bottom of the 'Submissions' tab.

Setting auto-approve will mean that submissions made by Business Admin associated to that business will be published to the website without the need for moderation.

DELETING A BUSINESS ADMIN

To delete a Business Admin account go to 'Users' in the left hand menu, select 'All users' in the secondary menu. Use the 'Search' bar to find the account you'd like to delete. Click on their name. then click on the cog drop down underneath the save button and select Delete. This will delete the account.

You also have the option to suspend and deactivate the account. We recommend you deactivate an account if there is a chance that you might want to reactivate it in the future.

HOW TO CREATE & ASSIGN A MEMBERSHIP PACKAGE

Creating a Membership Package

You first need to create an account.

- Click 'Packages' in the left-hand menu – you'll be presented with a screen which displays all the current packages you have created listed under the 'Package Tier' column (if you haven't created any packages yet the list under the Package Tier column will be empty).
- To create a package, click the red '+ Create' button in the top right-hand corner.

General (Tab)

You first need to create an account.

- Enter the title of the package under in the field under 'Title' heading (this is a required field)
- You can set a 'Value' for the package by entering a number into the field under 'Value'. This should be a number only. Entering a number into this field will create a hierarchy on the frontend of the website. The highest value packages will display above lower values on pages where there are card listings on the website.

You are required to enter a Value.

If you **do not** want your packages to be displayed in an order of hierarchy then enter the same value for all your packages, this could be 0.

All Other Tabs

The number of tabs that appear on this screen will depend on your DestinationCore package, and the entry types that you have enabled within your DC Business Login package.

There are toggles at the top of each tab. The number of toggles that appear will depend on if you have a multi-site CMS.

- Activate any of these toggles if you would like your businesses to be able to make this type of submission on the sites in question. Leave them deactivated if you do not want them to be able to make this type of submission.
- Typically, the tabs will be entry types such as Business Directory, Blog, Event or Offer – only activate the toggles of the types of content that you want businesses assigned to this package to be able to create.

Underneath the 'allow' toggles at the top of the screen you will see a section titled 'Entry Type' and then a series of toggles.

- Activate any content fields that you would like businesses assigned to this package to be able to edit in the CMS (For example: if you'd like businesses in this package to be able to update the Entry Main Image for this entry type then activate the toggle next to Entry Main Image).
- Any toggle that is activated will mean businesses assigned to this package will be able to edit that content when they are logged into the DC Business Login. The opposite is true for deactivated toggles.

TOP TIP

You may want to limit lower tier packages to editing just their business profile page. If that is the case only activate the toggle at the top of the Business Directory tab and leave all the other toggles deactivated.

For mid tier packages you may wish to allow them to make event and offers submissions, in addition to editing their business profile. In which case you'd activate the toggles at the top of the Business Directory, Event and Offer tabs and leave all the other toggles deactivated.

For higher tier packages you may wish to allow them to make all types of content submissions. In which case you'd activate the toggles at the top of all the tabs.

When creating packages make sure you work through all the tabs, and double check that you have assigned the correct benefits to the package you are creating.

Don't forget to click the **'Save'** button in the top right corner when you are ready to finalise the package.

DESTINATION CORE

HOW TO CREATE & ASSIGN A MEMBERSHIP PACKAGE (CONTINUED)

Assigning a Membership Level to a Business

- Click 'Entries' in the left-hand menu – you'll be presented with an 'All entries' screen.
- Click on 'Business Directory' in the secondary menu – a list of all the business profiles will appear.
- Using the 'Search' bar at the top of the page search for the business or scroll the list until you find the business that you want to assign the newly created account to.
- Once you have located the appropriate business click on the link under the 'Entry' column.
- Locate and click the 'Submissions' tab.
- Under the 'Package' heading click the '+ Select package' button – you will then be presented with a pop-up with a list of all packages you have created.
- Using the 'Search' bar at the top of the pop-up search for the package or scroll the list until you find the package that you want to assign to the business.
- Click on the appropriate package and the 'Select' button will be highlighted in red.
- Click the 'Select' button – this will then assign the package to the business.

TOP TIP

You can only assign one package per business. If you want to change the package that is assigned to the business, you need to deselect the current package – you can do this by clicking on the X next to the current package.

Once you have deselected the current package you are then free to assign a new package.

DELETING A PACKAGE

To delete a package, go to 'Packages' in the left-hand menu and click the link to open up the packages screen. Select the tick-boxes of the packages you wish to delete and then using the dark grey cog drop down towards the bottom of the screen select 'Delete' from the drop down. This will delete the packages with the tick boxes selected.

DESTINATION CORE

HOW TO REVIEW SUBMISSIONS

- Click 'Submissions' in the left-hand menu - this will open a sub-menu within the left-hand menu.
- Click 'View Submissions' in the sub-menu.
- You'll then be presented with the main 'Submissions' screen and you'll see a secondary menu of Pending Submissions, Approved Submissions and Rejected Submissions.

View Pending Submissions

Pending Submissions is a list of all the submissions that have been made by Business Admins that have not yet been reviewed and approved, or rejected.

- Click on 'Pending Submissions' in the secondary menu - you will then be presented with a list of all the Pending Submissions.
- You can review the entry by clicking on the blue link under the entry column - this will open the submission.
- All the sections that have been changed in the submission will have a blue bar to the left of them - these are the areas that you need to review.

TOP TIP

The total number of Pending Submissions will be highlighted in a notification bubble. Try to not let the number of unapproved submissions get too high. This will lead to frustration for Business Admins and make the approval process seem over whelming. Little and often is the key to success for approving Pending Submissions.

View Approved Submissions

You can view all the previously Approved Submissions by clicking on 'Approved Submissions' in the secondary menu. Navigate to each submission in the same way as would for a pending submission.

View Rejected Submissions

You can view all the previously Rejected Submissions by clicking on 'Rejected Submissions' in the secondary menu. Navigate to each submission in the same way as would for a pending or approved submission.

ENTRY LIST - VIEW A SUMMARY OF BUSINESSES & THEIR ASSOCIATED PACKAGE

If you click on 'Entry List' in the sub menu under Submissions in the left-hand menu you will be presented with a list of all the business profiles which exist on your website, from here you can view the business admins that are associated with each business, the membership package that is assigned to them, and if you click on the grey 'Expand' button you will then be presented with details of all the other submissions that are associated to that business.

DESTINATION CORE

HOW TO CUSTOMISE THE SYSTEM EMAIL NOTIFICATIONS

You can customise emails that go out to business admins. This means you are in control of the messages that are sent from the system. This is particularly useful if you wish to set expectation around how long it will take for you to typically review submissions, or what business admins can do to improve the way they use the service.

To customise the system email notifications:

- Click 'Submissions' in the left-hand menu – this will open a sub-menu within the left-hand menu.
- Click 'Manage Emails in the sub-menu – this will open a screen from which you can manage the system emails.

Notification Emails

Which people, within your organisation, would you like to receive email notifications when a business admin makes a submission?

- Enter a list of email addresses to receive notifications when a new submission is created. Separate multiple email addresses with a comma.
- If you **do not** want anyone to receive email notifications leave this section empty.

TOP TIP

It is easy to change who receives notification emails. If you have a member of the team on leave, they can be temporarily removed from receiving emails. New joiners or team members covering annual leave can be added.

HOW TO CUSTOMISE THE SYSTEM EMAIL NOTIFICATIONS (CONTINUED)

Notification Logo (or Image)

Here you can add an image or logo that you'd like to appear in all the system emails which get sent out to business admins. You can only add one image, if you want to remove the current image click the X, and then you're the '+ Choose' button to add a different image.

Logo (or Image) Position

You can set the graphic you have uploaded to be located at the top or the bottom of the system email. Do this using the drop down.

TOP TIP

As the system emails will be going out to your business admin contacts you can use the Notification logo (or Image) to promote things like awards or business support services.

Notification Email Introduction

This is the first line of the system emails. The text you enter this box will be preceded by the business admins name. We recommend including a brief thank you, and information regarding how long you usually take to approve submissions (i.e. 'Thank you for using the Visit Ourcity Business Login. New submissions are checked daily, and we aim to review all submissions within 24 hours.'

Notification Email Outro

This is the final line of the system emails. The text you enter this box will be preceded by some automatically generated content acknowledging receipt of the submission that has been made. We recommend including a brief sign off and using the opportunity to promote further business support opportunities. (i.e. 'While you are waiting for your submission to be reviewed why don't you check out some of the other business support opportunities available to you on our trade site.'

TOP TIP

At the bottom of the page, you will see a preview of how the system emails will appear. View this to check you are happy with the content and context of the emails.

System emails will be sent out to business admins when:

1. A new submission has been made
2. A submission has been rejected (the reason for rejection will be included within the body of the email)
3. A submission has been approved and gone live

After you have made all the changes to system emails don't forget to click the red 'Save' button in the top right-hand corner to save the changes you have made.

DESTINATION CORE

CURRENTLY WORKING WITH

BROUGHT TO YOU BY

JACOB BAILEY GROUP™

WWW.DESTINATIONCORE.COM