safelocaltrades.com

Recommended & Appro✓ed

Website Guidelines For Members

As a registered member of Safe Local Trades, you have access to a *Members Area* of the website that provides you with a toolbar of options that will appear across the top of the screen once you are logged in. Here you will see any email or text enquiries that have been sent to you, all customer reviews, customers who have set you as a favourite and much more. You can also make amendments to certain areas of your website profile. This document will help you to navigate through all the available features.

Table of Contents

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Appro✓ed Member

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Section 1

Logging into your Members Area

To log into the **Members Area** of **www.safelocaltrades.com**, members will be required to enter their email address and a password. When a member's profile initially went live, a generic password was issued. We would strongly advise all members to change that password to something more meaningful as soon as possible.

Change your password

- Click on the **Log In** link at the top right of any page of the **www.safelocaltrades.com** website
- Enter your email address and either the generic password provided or your current one
- Select the **Edit Profile** option next to **Log Out** link as shown below:-

> **Members Area**
>
> Welcome back, Ben
> Log Out | Edit Profile ⬅
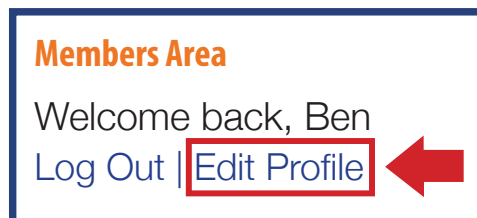
This will take you to your profile page where the password is encrypted. To change:-

- Go to the **Password** field and enter a new password
- Go to the **Password Again** field and enter the same password
- Page down and click on the **Save Changes** button

You can now log in using your email address and your new password.

Forgotten Password

If the password has been changed, and a member is unable to remember what it is, then resetting is simple:

- Click on the **Log In** link at the top right of any page of the website
- Click on the **Forgotten your password?** link in the bottom right-hand side of the window
- Enter your email address and the system will then generate a response with all the necessary steps to reset

Section 2

Main Profile page

When your record was first created on the SLT website, two separate areas would have been populated – a main 'Profile' page and a Trade Category page(s) which are referred to as 'Advert(s)'.

The main 'Profile' page contains the 'Vetting Information', 'Qualifications' and 'Associations' that appear on the right-hand side of any Advert page(s); no changes to these three areas can be carried out by a member and therefore if any additional qualifications or associations are obtained during the course of their membership, we would ask that they please let us know by emailing copies of any relevant documentation to **enquiries@safelocaltrades.com**; we can add them to the Profile page.

Updating Personal Details

Members Area

Welcome back, Ben

Log Out | Edit Profile ⬅
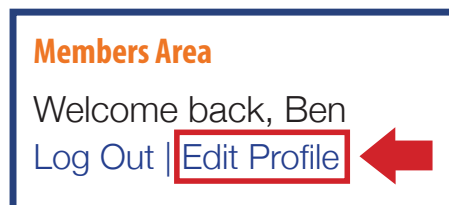
When you log into your account, you can access a restricted view of this Profile page by clicking on the **Edit Profile** in the top right of the page as shown in the image below. We would suggest that this page is **only** used to **change your password** (see Section 1).

The following areas are also attached to the main Profile and will therefore appear by default on any Advert pages:

• Company logo
• Reviews
• Video
• Gallery

Out of the above four, only the **Gallery** can be maintained by members.

Address change of home or business

If a business or home address, telephone number or email address changes, a new website or social media page is obtained, please let us know by emailing us at **enquiries@safelocaltrades.com** and we will carry out these changes on the Profile and Advert(s). This information is very important to us, as we will need to update these details across all our other secure applications such as our accounting and CRM systems and also any related social media.

Overview Menu Option

The Overview menu option provides you with access to areas of your Advert(s), including 'click stats'. *Ad Display* relates to how many users have searched for your trade category in your PE Postcode area; *Profile Display* shows how many times your Advert has been directly viewed; *Favourites* show the number of customers who have added you to their list of favourite members (which they can view when they log into their account area) and other useful information.

Edit the Text of your Services

Each member's Advert on *www.safelocaltrades.com* contains an area called *Services* - the contents of this are critical to engage customer contact, as it outlines what you and your business can provide and the *Services* you can carry out.

To Edit the text contained within your *Services*:-

- Log into your *Members Area* by clicking on **Log In** (top-right of any page of the website

- Once logged in, the following toolbar will appear across the top of the page
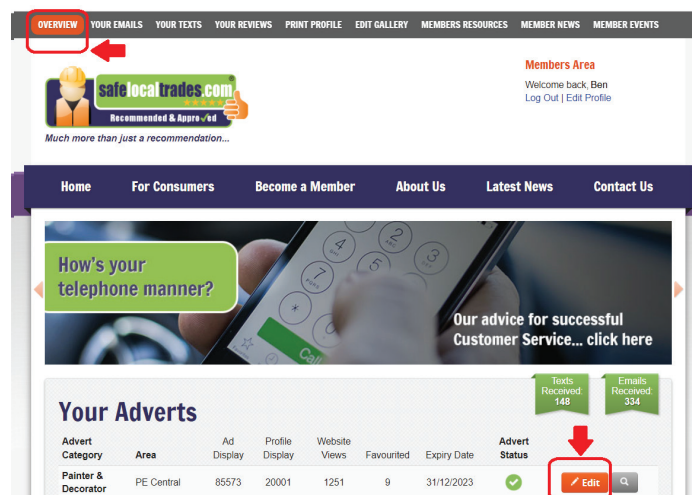
- Select *Overview* - your Advert(s) will now be displayed as per the example shown above

- Click on the *Edit* button as highlighted and this will bring you into your *Advert*

- Page down to the *Services* area and amend your text (do not delete the header text as this is used for Google) and then click on *Save Changes*

- To check how your new profile looks, go to *Check a Member* at the bottom of the page and enter part or all of your contact or company name to access your record quickly.

Section 4

Deactivating your SLT profile temporarily

Members can deactivate their profile at any time from the www.safelocaltrades.com website – this functionality can be useful for when you are experiencing a *busy period*, going on *holiday* or unavailable due to *sickness*. When a profile is deactivated, this means that when a customer searches for your category, your record does not appear in the *Search Results* window; however, your profile is still live on the website under the *Check a Member* area found at the bottom of every page of the **www.safelocaltrades.com** website.

NOTE: Your Google index to your profile on Safe Local Trades will remain unaffected (i.e., when you key in your company name and town into Google, an index link to your record on SLT will still appear) therefore customers can still gain access to your record via this method even when your profile is deactivated.

How to deactivate your SLT profile

Log into your *Members Area* (found at the top right of any page of the SLT website) - if you do not remember your password, click on the *Forgotten Password* link on this page and you will be given the option to reset it.
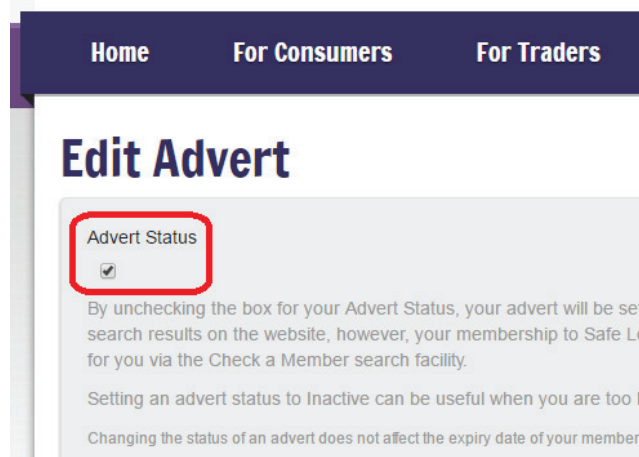
A grey toolbar will appear across the top of the page:-

• Click on the *Overview* menu option as highlighted below

• Select the *Edit* button next to your Advert

- On the next page, uncheck the **Advert Status** box, page down and click on **Save Changes**.

A confirmation message will then appear and a ⚠️ will replace the green tick in the **Advert Status** field. If you have more than one category, you will need to repeat the process above.

How to reactivate your SLT profile

Log into your **Members Area** and the grey toolbar will appear across the top of the page:-

- Click on the **Overview** menu option
- Select the **Edit** button next to your Advert
- On the next page, tick the **Advert Status** box
- Page down and click on **Save Changes**
- Repeat the process if you have more than one trade category

A confirmation message will then appear and, when you click the back button, a ✅ will now appear in the **Advert Status** field. If you have more than one category, you will need to repeat the process above.

Your Advert(s) will now reappear in the customer **Search Results** window.

The **Search Results** window is what appears when a customer selects a trade category, enters their postcode and clicks **Search** on the homepage of **www.safelocaltrades.com**

NOTE: *Changing the status of your profile does not affect the expiry date of your membership period, nor does it make you eligible for a refund*

Section 5

Customer Email & Text Enquiries

Every email or text enquiry that goes through the website is automatically emailed to you and, in addition, appears within the menu options shown below i.e., **Your Emails** and **Your Texts**.


Within these windows, a number of functionality options are available as follows:

Filter Messages:
To find an enquiry from a specific customer, you can search using their **First** or **Last Name** and then click on the **Filter Messages** button. To begin a different search, click on **Reset**.

Enquiry Status:
In order to track an enquiry, a drop-down box is available to allow a status to be assigned, as shown below:
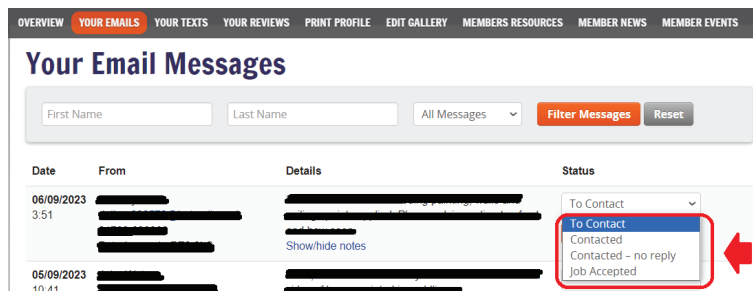

Prompt customer for review

Beneath the Status for each enquiry is an option to prompt that customer for a review for the work that you carried out. Once you have clicked on this box, you will be presented with a window that shows the full name of the customer and their email address. Prior to clicking on the **Send Prompt** button, amend the name box to reflect what you would call this customer, for example, it could be a title and surname like 'Mrs Jones' or, just the christian name of 'Julie'. The email will be sent from our website, not your email address, with the salutation of **Dear Mrs Jones** or **Dear Julie** (as opposed to **Dear Julie Jones**). On that basis, feel free to prompt more than once if no response – but no more than three times as a general rule.

Customer Reviews

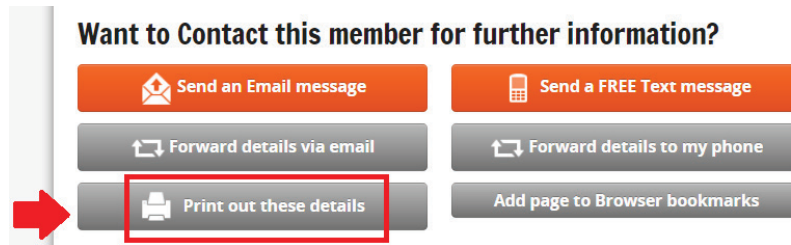When a review is uploaded to your profile, the website automatically emails a copy to you; all these reviews are held under the *Your Reviews* menu option for you to browse at any time.

Each review has a *Marked for Print* underneath. The last five reviews with a green printer icon (not grey), will be included in your *Print Profile* (see below). Double-click on this icon to toggle the *Marked for Print* to green (Printable), or grey (off).
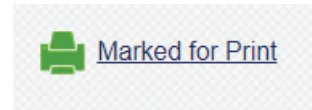
Print Profile

This menu option provides you with the functionality to print a condensed version of your Profile / Advert (e.g., to give to a potential customer, etc) and is also available to website visitors who view your Advert page.

Want to Contact this member for further information?

Send an Email message | Send a FREE Text message
Forward details via email | Forward details to my phone
Print out these details | Add page to Browser bookmarks

You can change the thumbnails by reordering your Gallery (the first five images appear here).

You can also change the reviews shown - we use the latest five reviews which you have marked as Printable (green). To edit these, please visit your Reviews page.

Please note the content may span multiple pages when printing.

Uploading photos to your gallery

The Gallery area provides members with the opportunity to showcase their work and it is strongly recommended that photos are uploaded to this area. For those members who may not have suitable photos e.g., locksmith etc., then perhaps just a photo standing beside their signed work vehicle would suffice.

To begin, log into your **Members Area** from any device (found at the top right of any page at www.safelocaltrades.com) - if you do not remember your password, click on the **Forgotten Password** link on this page and you will be given the option to reset it.

A grey toolbar will appear across the top of the page:-

- Select **Edit Gallery** and go to the **Upload a new image for your profile** area
- Click on **Choose file** (to select the photo from its location)
- Enter a **Caption**, describing the content of the photo so the customer can understand the work you are showcasing.
- Click **Upload this image**

The progress bar underneath will show when the upload is 100% complete. Please note that all photos need to be in a jpg format and must not exceed a 5MB filesize.

Repeat the process to upload an unlimited numbers of photos.

Uploading images from devices

When uploading from a device, such as a mobile phone or tablet, you will be given these three options to select from (please note that 'Video' cannot be used in the Gallery area.

|	
Take Photo or Video	📷
Photo Library	▢
iCloud Drive	☁
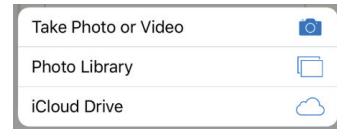
Editing your gallery

In this area, photos can be reordered according to preference.

Moving photos around is simple - just drag and drop to the position in the gallery.

Image Options

By hovering over a photo using the cursor, the following options appear:

• A **pencil** to the left hand side - this is the *Edit* function.

• A **dustbin** to the right hand side - this provides the option to *Delete* the image
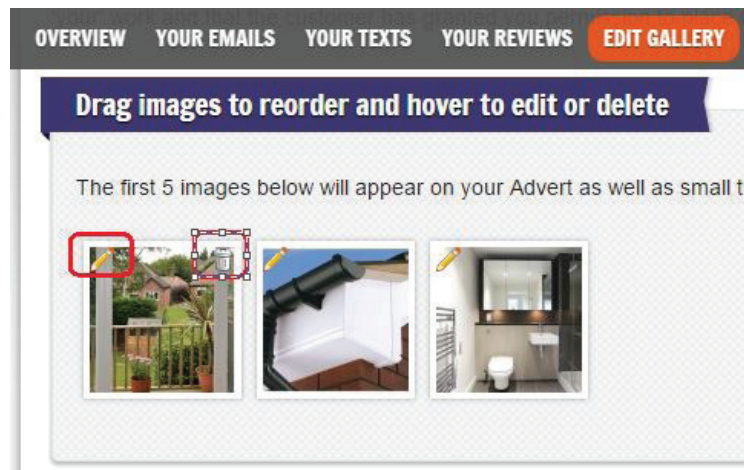
Editing your Image Options

Select the 'Pencil' icon (only available on PC's or laptops).

There are now the following five options available:-

• Rotate image clockwise or anticlockwise

• Zoom in or out on image

• Move the image (completed via the chequered square)

• Crop image

• Change caption

Once completed and saved, click "View your live profile" to view how it appears on the main profile page.

> **Tip:** To increase the professionalism of the Gallery area, it is recommended to use a free photo application such as ***www.photojoiner.net***; this will allow photos to be grouped together so that, for e.g., 'before' and 'after' photos can be displayed in one single image.