



TOOLBOX USER GUIDE

You'll find all the tools you need to grow your business in the All Checked Toolbox

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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. Other wise 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.

Once this information has been entered you will be taken to your Toolbox.

FIG 1. EXAMPLE ACTIVATION EMAIL.

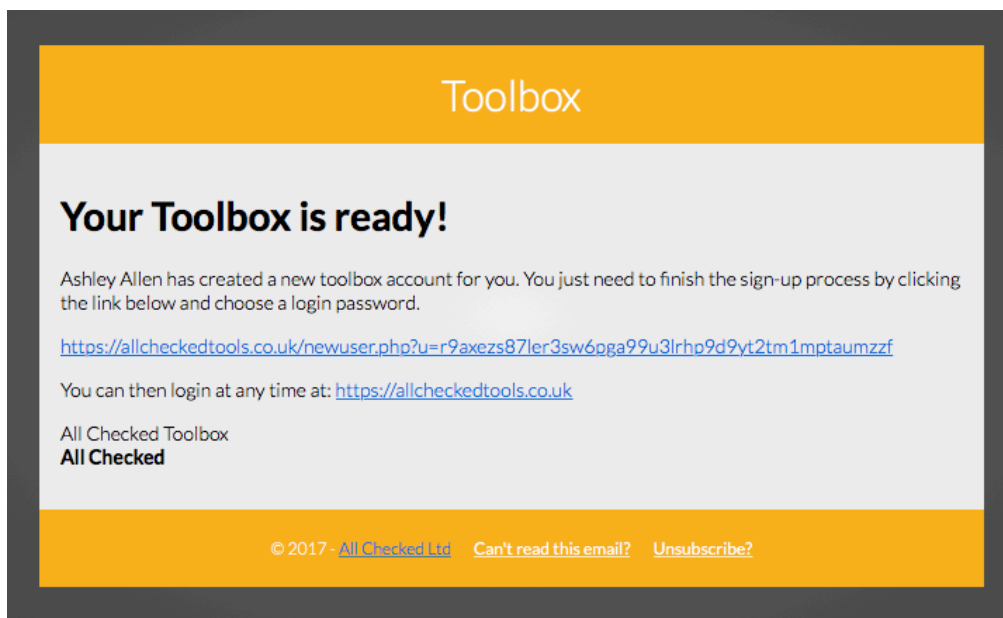
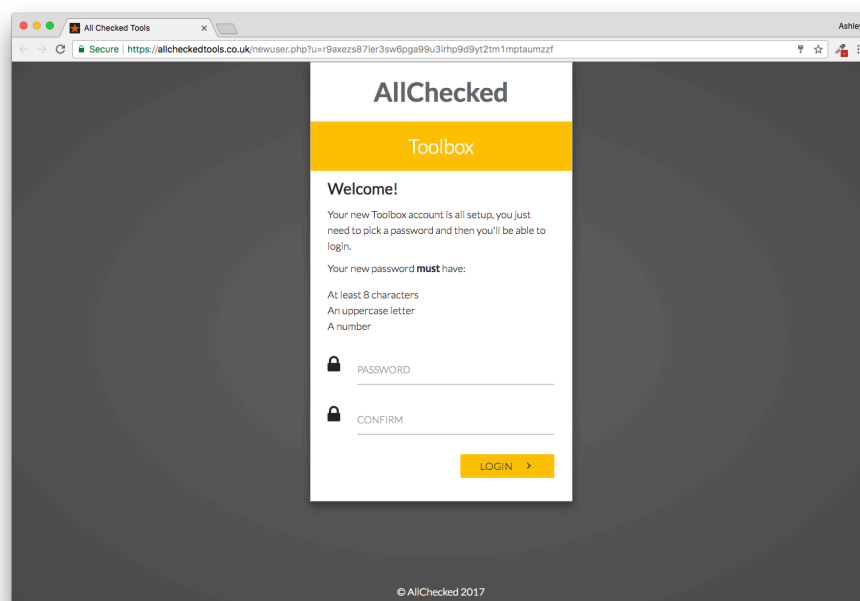


FIG 2. SET PASSWORD



Logging in

To log in to your Toolbox visit <http://allcheckedtools.co.uk> (or select the 'Toolbox' link from <http://allchecked.co.uk>)

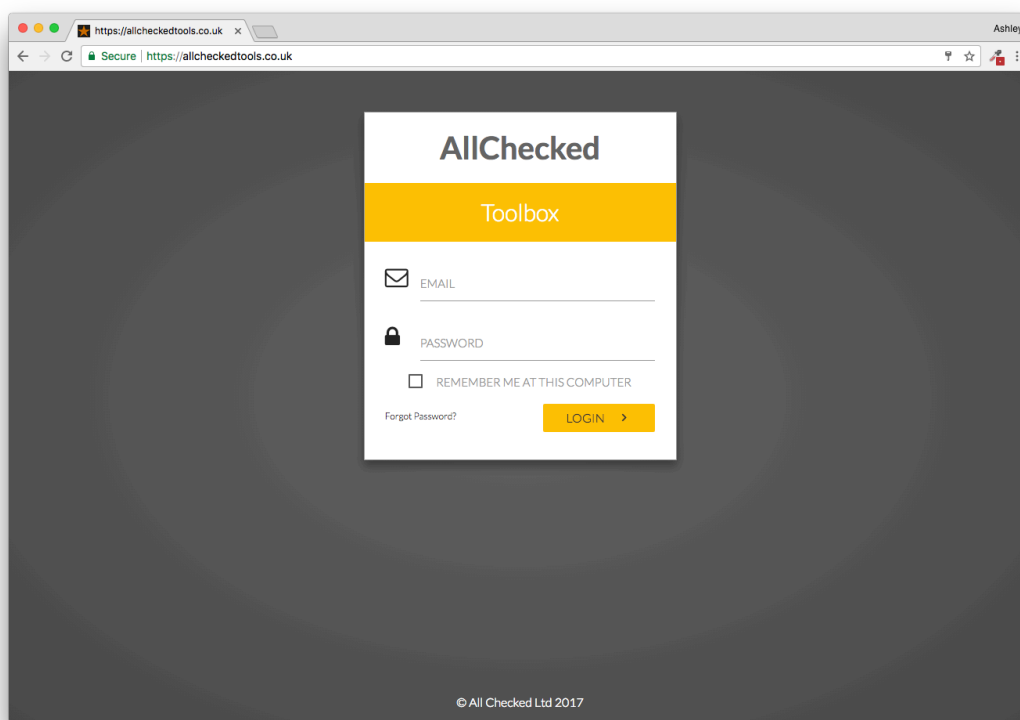
Enter your email address and password that you set (Fig 3). If you have forgotten your password, please click the "Forgot Password" link and follow the on screen instructions.

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 entering the information again.

Once successfully logged in, you will see your home screen (Fig 4).

FIG 3. LOGIN SCREEN



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. Your name and company are displayed at the top of the central column and you'll also find 4 useful toolbox alerts in the right hand column.

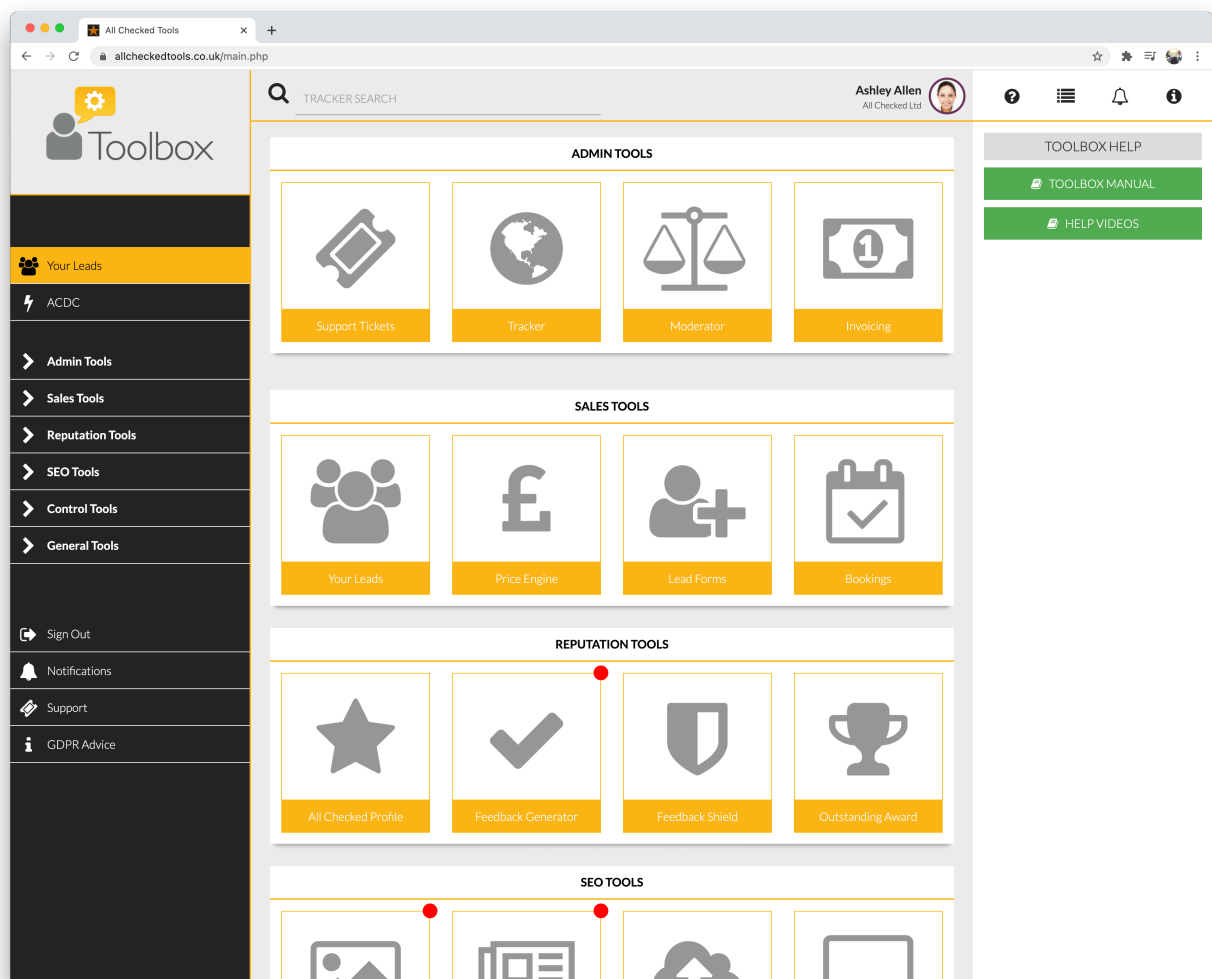
Help - Select help for information about how to use the tool you're currently using.

Tasks - Set a task for a colleague or view tasks colleagues have set for you.

Notifications - Notifications (such as new leads) can be found here.

Information - Where applicable you'll find extra data here.

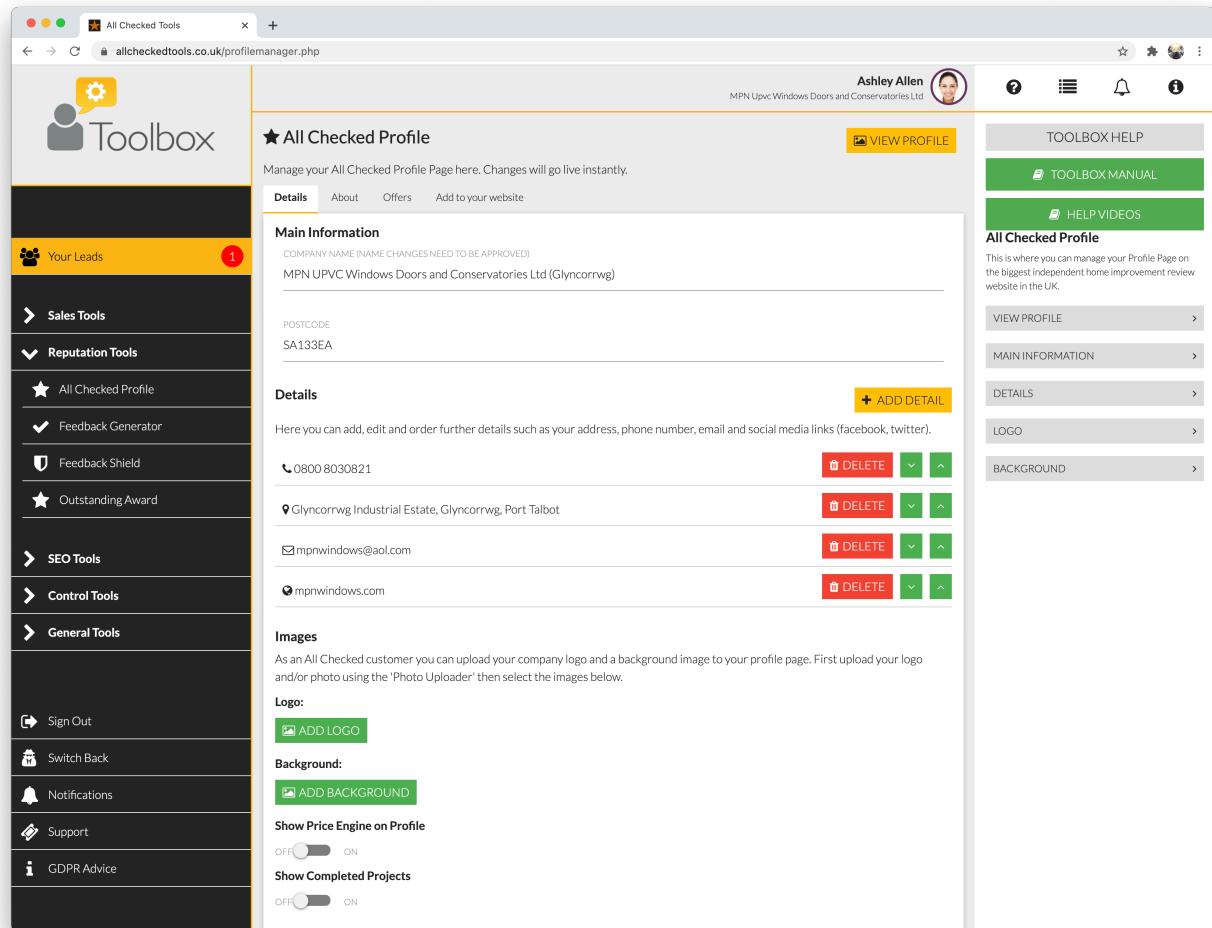
FIG 4. HOME SCREEN



All Checked Profile

This is where you can manage your Profile Page on the biggest independent home improvement review website in the UK. <http://allchecked.co.uk>

FIG 17. 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 company 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.

About Tab

Use this section to add text to the 'about' tab on your All Checked profile. You may want to outline the history of your business and/or describe your unique selling points.

Simply type into the Text Box below and click SAVE when you're done.

The screenshot displays the 'All Checked Profile Manager' web application. The interface is divided into three main sections: a left sidebar, a central content area, and a right sidebar.

- Left Sidebar:** Contains a 'Toolbox' logo at the top. Below it is a 'Your Leads' section with a plus icon. A list of tool categories follows: 'ACDC', 'Sales Tools', 'Reputation Tools', 'SEO Tools', 'Control Tools', and 'General Tools'. At the bottom are links for 'Sign Out', 'Switch Back', 'Notifications', 'Support', and 'GDPR Advice'.
- Central Content Area:**
 - At the top, it shows the user's name 'Ashley Allen' and 'Demo Company' next to a profile picture, with a 'VIEW PROFILE' button.
 - Below this is the '★ All Checked Profile' header and a sub-header 'Manage your All Checked Profile Page here. Changes will go live instantly.'
 - A tabbed interface shows 'Details', 'About' (selected), 'Offers', and 'Add to your website'.
 - The 'About' tab contains a text box with placeholder text: 'Phasellus bibendum eros id iaculis lacinia. Nulla eget vehicula diam. Curabitur ipsum magna, tempor at mattis quis, aliquet at tellus. Nulla lectus magna, vehicula vel tincidunt vel, aliquam vel lorem. Mauris eu euismod nisl. Sed nulla nisi, consequat ac nisl non, feugiat fringilla neque. Vestibulum tincidunt mi risus, vitae commodo quam viverra euismod. Sed accumsan velit at sollicitudin pharetra. Quisque non enim ultrices, iaculis odio a, efficitur risus. Duis tortor quam, euismod nec cursus sed, fermentum ut quam. Duis commodo commodo fringilla.'
 - A 'SAVE' button is located at the bottom right of the text box.
- Right Sidebar:**
 - Contains 'TOOLBOX HELP' with links to 'TOOLBOX MANUAL' and 'HELP VIDEOS'.
 - A section titled 'All Checked Profile' with a description: 'This is where you can manage your Profile Page on the biggest independent home improvement review website in the UK.'
 - A list of profile management options: 'VIEW PROFILE', 'MAIN INFORMATION', 'DETAILS', 'LOGO', and 'BACKGROUND', each with a right-pointing arrow.

Offers Tab

Adding offers to your All Checked profile page will boost your profile and attract more customers.

Select ADD OFFER and then enter a Headline (eg. 10% OFF all products), followed by an explanation (BODY field).

Then enter the terms of the offer, followed by an Offer Code (if required) and an expiry date.

You can also select a background image from your PHOTO UPLOADER Tool.

Finally, select the categories that apply to your offer so that when customers are looking for these services your offer will appear.

Offers will automatically be taken off the offers tab when they reach their expiry date.

Click the icon on any offer to edit it, or the icon to delete it.

The screenshot displays the 'All Checked Profile' management interface, specifically the 'Offers' tab. The left sidebar contains a 'Toolbox' menu with options like 'Your Leads', 'ACDC', 'Sales Tools', 'Reputation Tools', 'SEO Tools', 'Control Tools', 'General Tools', 'Sign Out', 'Switch Back', 'Notifications', 'Support', and 'GDPR Advice'. The main content area is titled '★ All Checked Profile' and includes a 'VIEW PROFILE' button. Below this, the 'Offers' section explains that adding offers boosts the profile and attracts customers. It provides instructions on how to create an offer: select 'ADD OFFER', enter a headline (e.g., '10% OFF all products'), an explanation (BODY field), terms, an offer code (if required), and an expiry date. A list of 'Your offers (3)' is shown, each with a background image, headline, description, and a 'Quote code'. The offers are: 'SUMMER OFFER' with code 'TEST123', 'BIFOLD DOOR SALE' with code 'BIFOLD2021', and 'EASTER OFFER'. Each offer has a 'Terms and Conditions' field and icons for editing or deleting. The right sidebar contains 'TOOLBOX HELP' links (TOOLBOX MANUAL, HELP VIDEOS) and a list of profile management options (VIEW PROFILE, MAIN INFORMATION, DETAILS, LOGO, BACKGROUND).

★ All Checked Profile [VIEW PROFILE](#)

Manage your All Checked Profile Page here. Changes will go live instantly.

Details About **Offers** Add to your website

Offers

Adding offers to your All Checked profile page will boost your profile and attract more customers.

Select ADD OFFER and then enter a Headline (eg. 10% OFF all products), followed by an explanation (BODY field). Then enter the terms of the offer, followed by an Offer Code (if required) and an expiry date. You can also select a background image from your PHOTO UPLOADER Tool. Finally, select the categories that apply to your offer so that when customers are looking for these services your offer will appear. Offers will automatically be taken off the offers tab when they reach their expiry date. Click the icon on any offer to edit it, or the icon to delete it.

Your offers (3) [+ ADD OFFER](#)

SUMMER OFFER

Pellentesque quis libero mollis, facilisis lacus ut, finibus tortor. Sed consequat sem quis vehicula dapibus. Aenean iaculis erat vel dui tempor pharetra. Quisque lobortis interdum iaculis. Sed et volutpat mi. Pellentesque cursus nunc non risus sagittis, quis porta erat lobortis.

Quote code: **TEST123**

BIFOLD DOOR SALE

Phasellus eget varius ipsum, ut ullamcorper velit. Cras mollis sit amet nibh eu aliquam. Proin ut nisl eu erat efficitur vestibulum. Fusce lacus mauris, mollis vel ligula nec, accumsan pulvinar ex. Integer ultrices, neque sit amet sodales tempor, elit dui accumsan justo, ac fermentum nisl nulla quis nisl.

Quote code: **BIFOLD2021**

EASTER OFFER

Pellentesque quis libero mollis, facilisis lacus ut, finibus tortor. Sed consequat sem quis vehicula dapibus. Aenean iaculis erat vel dui tempor pharetra. Quisque lobortis interdum iaculis. Sed et volutpat mi. Pellentesque cursus nunc non risus sagittis, quis porta erat lobortis.

Quote code: **EASTER2021**

TOOLBOX HELP

- TOOLBOX MANUAL
- HELP VIDEOS

All Checked Profile

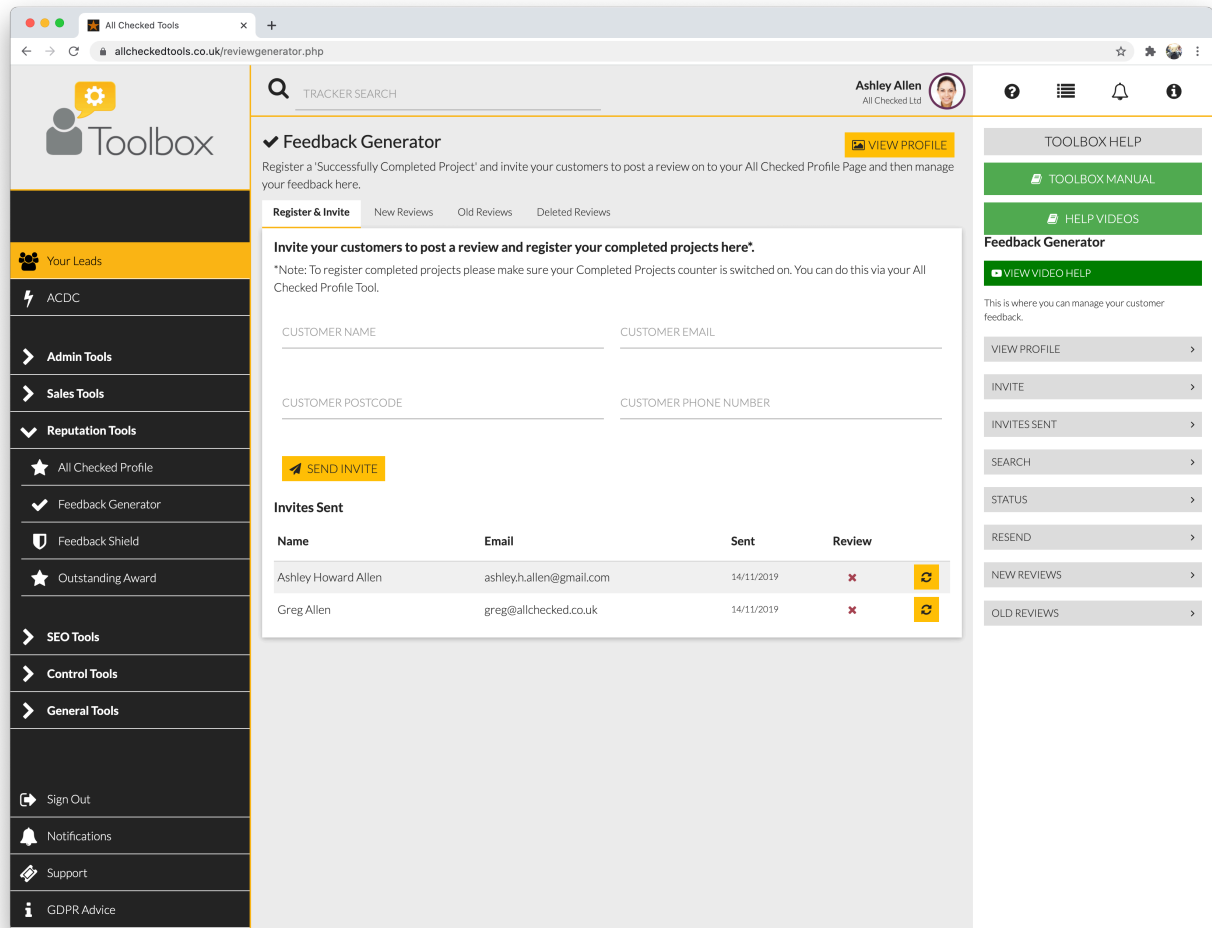
This is where you can manage your Profile Page on the biggest independent home improvement review website in the UK.

- [VIEW PROFILE](#)
- [MAIN INFORMATION](#)
- [DETAILS](#)
- [LOGO](#)
- [BACKGROUND](#)

Feedback Generator

This is where you can manage your feedback. (Fig 18)

FIG 18. FEEDBACK GENERATOR



View Profile

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

Invite Customers to leave a Review

Enter a customers email address and click “SEND INVITE” and we’ll send them an email asking for a review.

Invites Sent

This is a list of the invitations that you have sent in date order.

You can change the order for most recent first to oldest 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 in to the Search field at the bottom of the list.

Status

The Review column will display a red cross to indicate that we're awaiting feedback. This will change to a green tick when feedback has been received.

Resend

Select the yellow resend link to resend the invitation.

New Reviews

This is where you can view your feedback pending moderation.

- Select REPORT to report the review if you're unhappy with it.
- Select RESPOND to add your comments to the review
- Select ACCEPT if you're happy with the review. It will be published and removed from the New Reviews section.

Old reviews

This is where you can view your published feedback.

- Select REPORT to report the review if you're unhappy with it.
- Select RESPOND to add your comments to the review

Feedback Shield

Blocked Reviews

Any obvious hoax, malicious or unfair reviews will automatically be blocked by the Feedback Shield and you won't be required to take any action.

Reviews under investigation

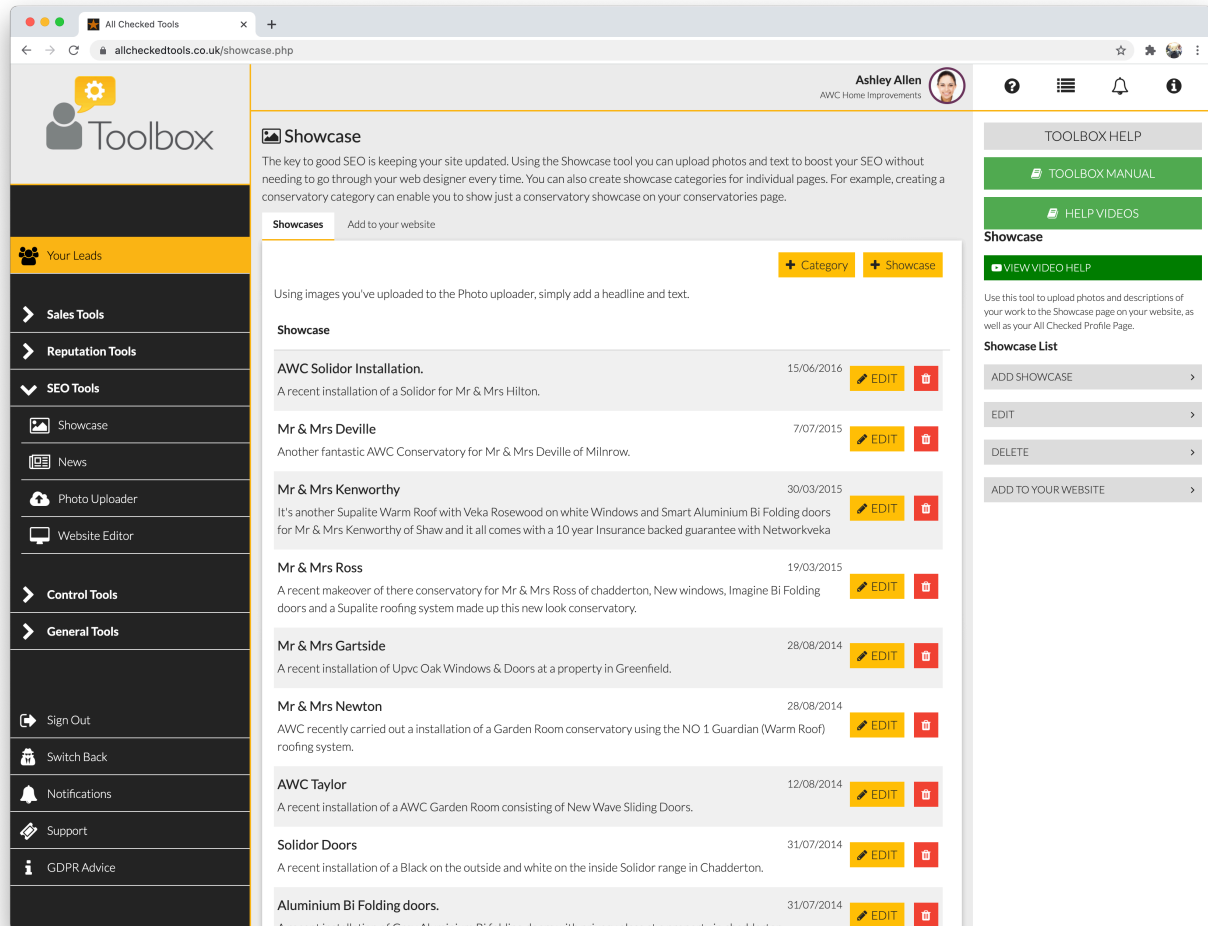
If a negative review is genuine you should contact the customer to resolve any issues privately to avoid later publication. If the customer can prove their claim and you refuse to act, the review will be published.

Remember: you can also use the Feedback Generator tool to add your comments to any review. If the review has already been moderated in the past, select the Old Reviews tab in the Feedback Generator to find it and then select RESPOND to add your comments.

Showcase

Use this tool to upload photos and descriptions of your work to the Showcase page on your website, as well as your All Checked Profile Page. (Fig 20)

FIG 20. SHOWCASE



To add a showcase

- Select + ADD SHOWCASE to add a new Showcase Project
- Click on the TITLE field to add a title to your Showcase Project
- Click on the PROJECT DESCRIPTION field to enter a description of the work. Try to use Products and location keywords to boost your SEO
- Select the photo(s) from your library to display in your Showcase Project
- Select ADD SHOWCASE to finish

To edit or delete a showcase, click the “EDIT” or “DELETE” buttons on next to the showcase you’d like to edit or delete.

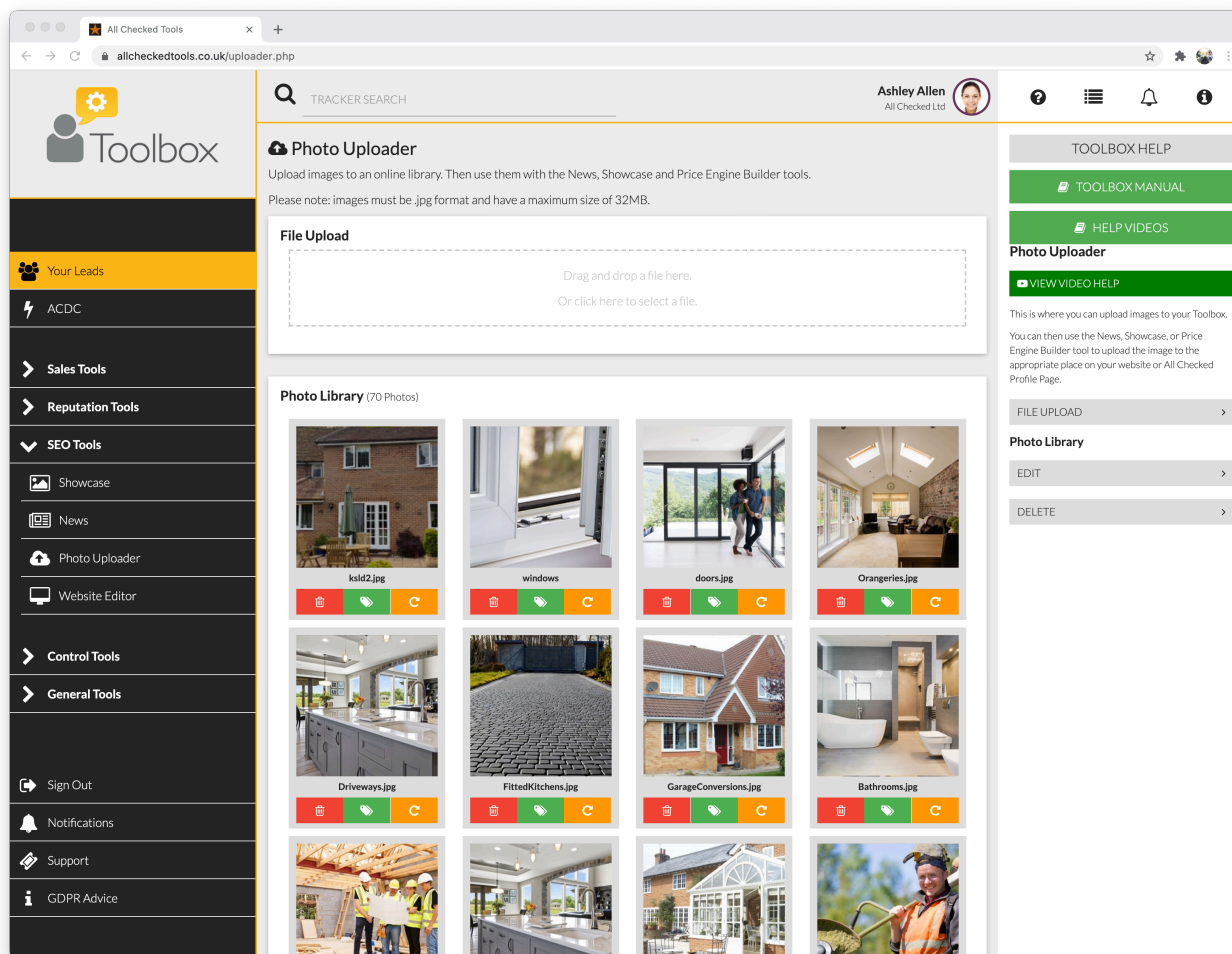
Add to your website

- 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

Photo Uploader

This is where you can upload images to your Toolbox. (Fig 19)

FIG 19. PHOTO UPLOADER



You can then use the News, Showcase, or Price Engine Builder tool to upload the image to the appropriate place on your website or All Checked Profile Page

File Upload

Either drag and drop a file from your computer in to 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 orange rotate symbol to rotate the image to the correct orientation.
- Select the red dustbin symbol to delete an image.

Your Leads

This is your lead management area (Fig 9). All the leads generated via a Toolbox mechanism (e.g. Price Engine), or a Facebook Group will be delivered here automatically.

Use this area to:

- Manage Your Leads
- Manually Add Leads to your database
- Monitor the performance of your sales people

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 9. YOUR LEADS, LEAD LISTING

The screenshot displays the 'Your Leads' section of the All Checked Tools dashboard. The interface includes a sidebar with navigation options like 'Sales Tools', 'Reputation Tools', 'SEO Tools', 'Control Tools', and 'General Tools'. The main area features a table of leads with columns for Status, Name, Date, and Source. A search bar is located at the top right. On the right side, there are summary statistics for Status, Sources, Delivery Sources, and Users, each showing counts for the last 30 days.

Status	Name	Date	Source
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/19 28 minutes ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/19 31 minutes ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/19 1 hour ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/19 2 hours ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/19 2 hours ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/18 13 hours ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/18 13 hours ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/18 17 hours ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/18 18 hours ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/18 20 hours ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/18 1 day ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/18 1 day ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/17 1 day ago	Price Engine V3.0
✓	Mr. David Williams 27 Trenchard Road, Broomfield, Essex, SSO10 7JF	2021/03/17 1 day ago	Price Engine V3.0

Status	Last 30 days
Fresh	9
Call Back	6
Emailed	9
Text	40
Appointed	232
Quoted	53
To Quote	12
Sold	85
Pending	7
Diary	2
Moving House	3
Calling Back	5
Door designer	5
Dead	11
Out of Area Emailed	23
Bought Elsewhere	5
Supply only	9
Quote too high	18
Bad Data	26
Time scale	4
Total	564

Your Sources	Last 30 days
Total	0

Delivery Sources	Last 30 days
Price Engine V3.0	325
Manual	239
Total	564

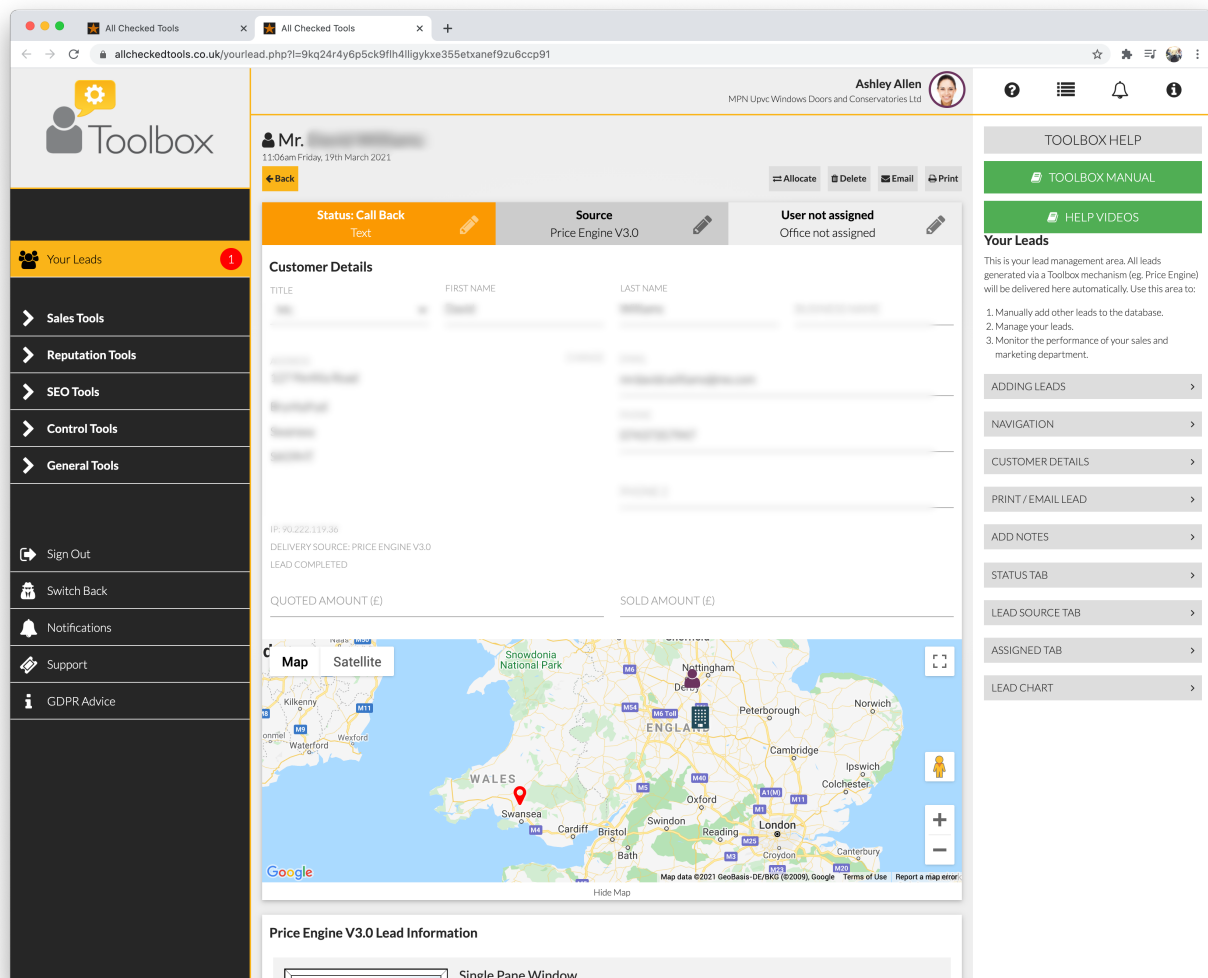
Users	Last 30 days
Danny O'Donovan	82
Paul Webster	3
Matthew Emanuel	0
Total	85

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 10. 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 buttons 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.

When you the assign ta lead to another user/office they will get a notification email to tell them they have a new lead.

Below the header are the lead details, where users can enter/correct information, view any addition 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 11).

FIG 11. LEAD SETTINGS (STATUS CHART)

Your Leads settings
Here you can change the Lead Status and Lead Source settings to improve the management of your leads.

Status Chart | Source Chart | Import Leads

As well as being a label for seeing what stage a lead is at, you can also assign a status to have a default user or office. For example, when the status is changed to 'Sold', it can be automatically then assigned to a user in charge of order fulfilment and alert them so they can progress it themselves.

Putting status in order (e.g. Fresh > Appointed > Sold > Installed), let's user see who leads should progress. A status can also be a sub-status of another status (e.g. Sold: Subject to Contract, Sold: Contract Signed, Sold: Installation Started) this allows you to have several levels of status if you require.

Your Statuses [+ ADD STATUS](#)

Status	Description	User	Office
Fresh	Fresh	-	-
Call Back	Pending	-	-
Emailed	No Contact	-	-
Text	Text from call back	-	-
Appointed	Appointed	-	-
Re Appoint	Re Appoint	-	-
Corona	Corona	-	-
Re Appoint	Re Appoint	-	-
Quoted	Quoted	-	-
To Quote	Arrange quote	-	-
Sold	Sold	-	-
Installed	Installed	-	-
Pending	Wrong number etc.	-	-
Diary	Forward Date	-	-
Moving House	Moving House	-	-
Calling Back	Calling back	-	-
Door designer	Door designer	-	-
Dead	Dead	-	-
Out of Area Emailed	Out of Area	-	-
Bought Elsewhere	Bought Elsewhere	-	-
Supply only	Supply only	-	-
Quote too high	Cant afford	-	-
Bad Data	Bad Data	-	-
Time scale	Time	-	-

System Statuses
These are statuses that are used by toolbox and cannot be deleted or modified.

TOOLBOX HELP
[TOOLBOX MANUAL](#)
[HELP VIDEOS](#)

Lead Settings
[VIEW VIDEO HELP](#)

Use Lead Settings to manage how you monitor the performance of your sales and marketing department.

- STATUS SETTINGS
- ADD STATUS
- STATUS CHART
- SETTINGS
- SOURCE SETTINGS
- ADD SOURCE
- SOURCE SETTINGS
- DELIVERY SOURCES

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 the performance of your marketing spend.

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 (e.g. when the status is changed to 'Sold' it can automatically be assigned to the user in charge of order fulfilment and your Toolbox will automatically raise a Notification for them to progress it).
- Add a DEFAULT OFFICE if you want to always assign a status to one office (e.g. when the status is changed to 'To Be Appointed' it can automatically be assigned to all users in the Sales Office and your Toolbox will automatically raise a Notification for them to arrange an appointment).
- 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 (e.g. you might assign The Express to your Newspaper 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.

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.

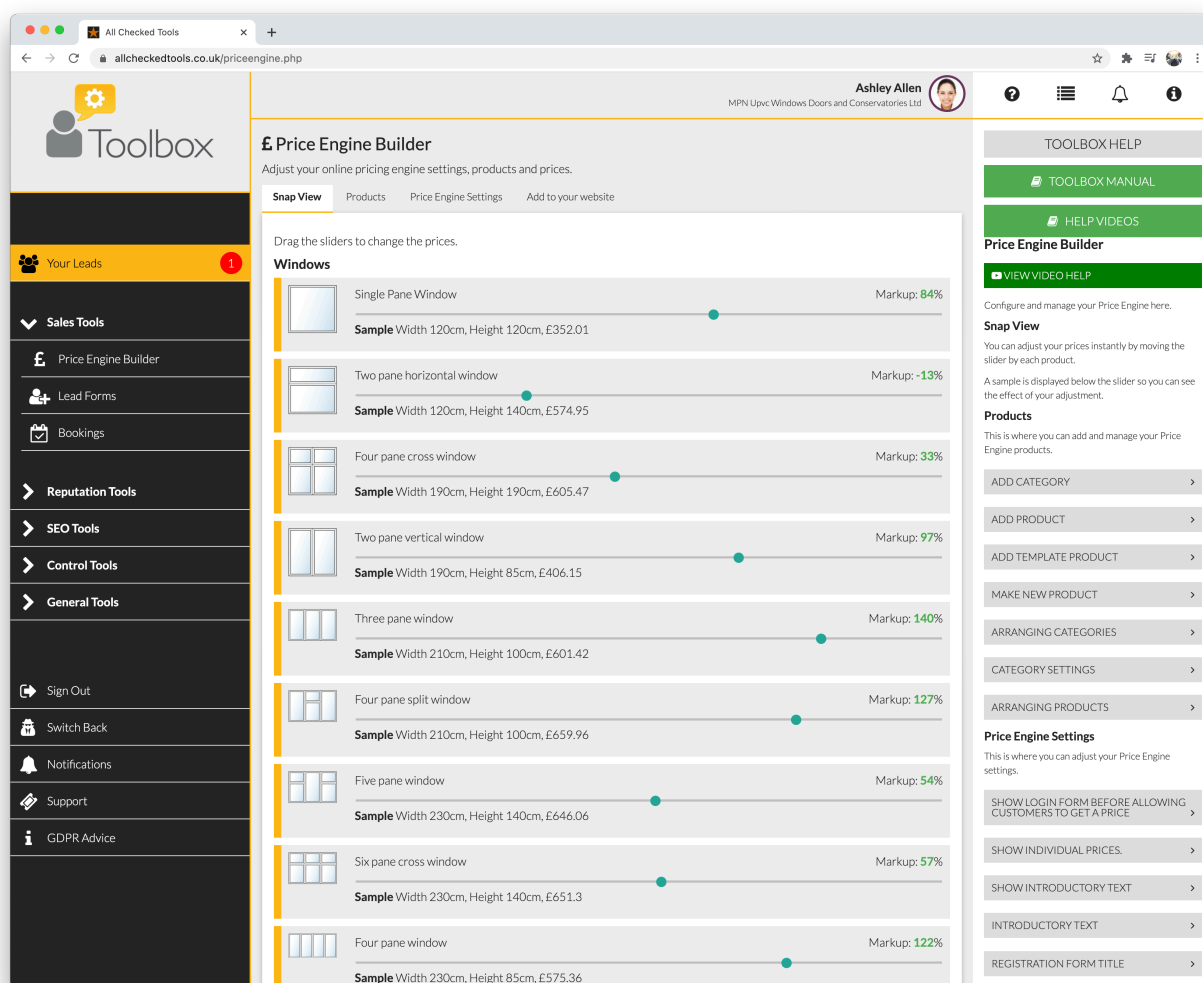
Price Engine Settings - Where you can alter settings such as currency.

Add to your website - Use this tab to send the code to your website designer.

Snap View (Fig 12)

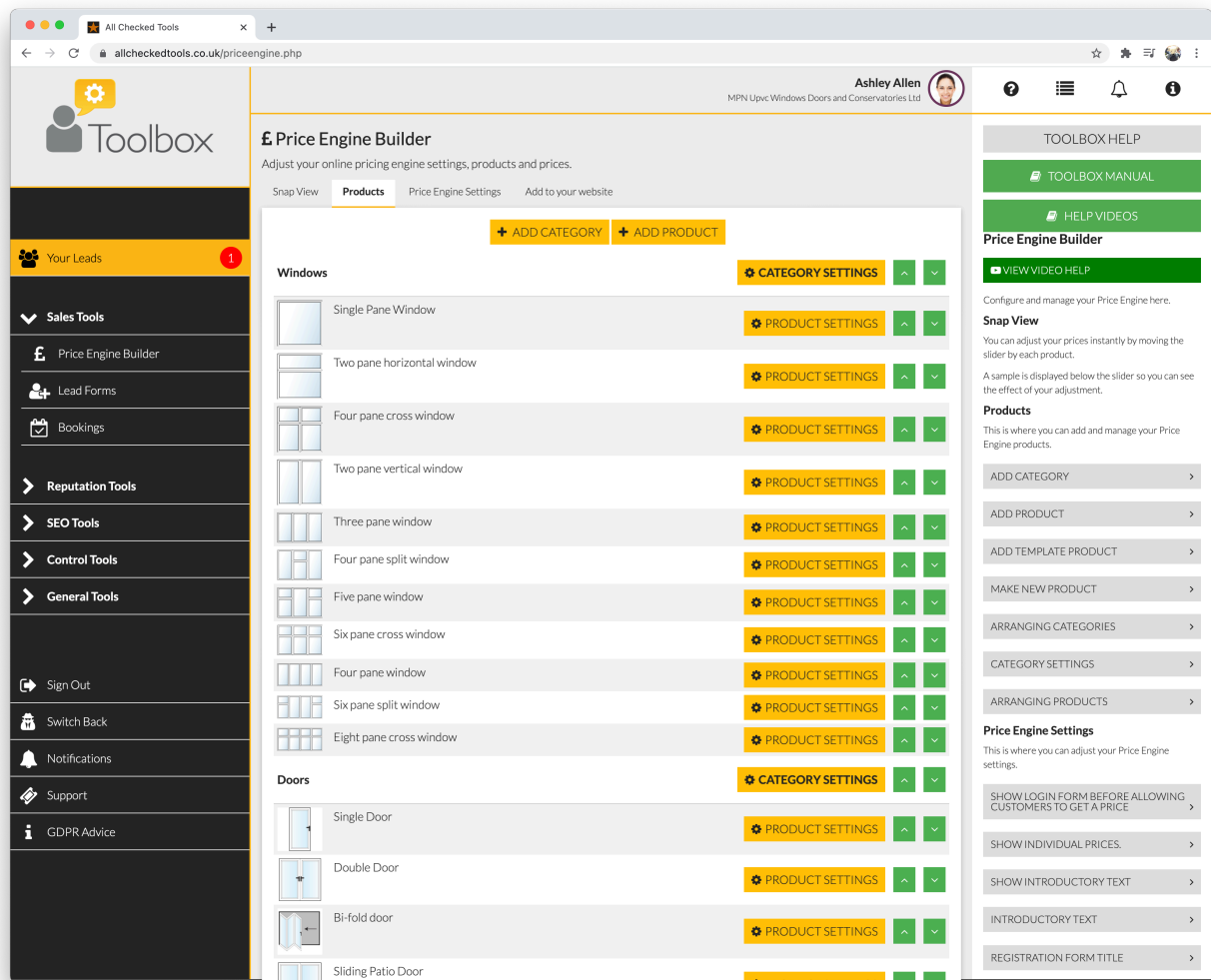
You can adjust your prices instantly by moving the slider by each product. A sample is displayed below the slider so you can see the effect of your adjustments.

FIG 12. SNAP VIEW



Products (Fig 13)

FIG 13. 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 in to your Toolbox and you can select and edit any of them, or you can create your own.

- To add a product 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.
- Then 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.

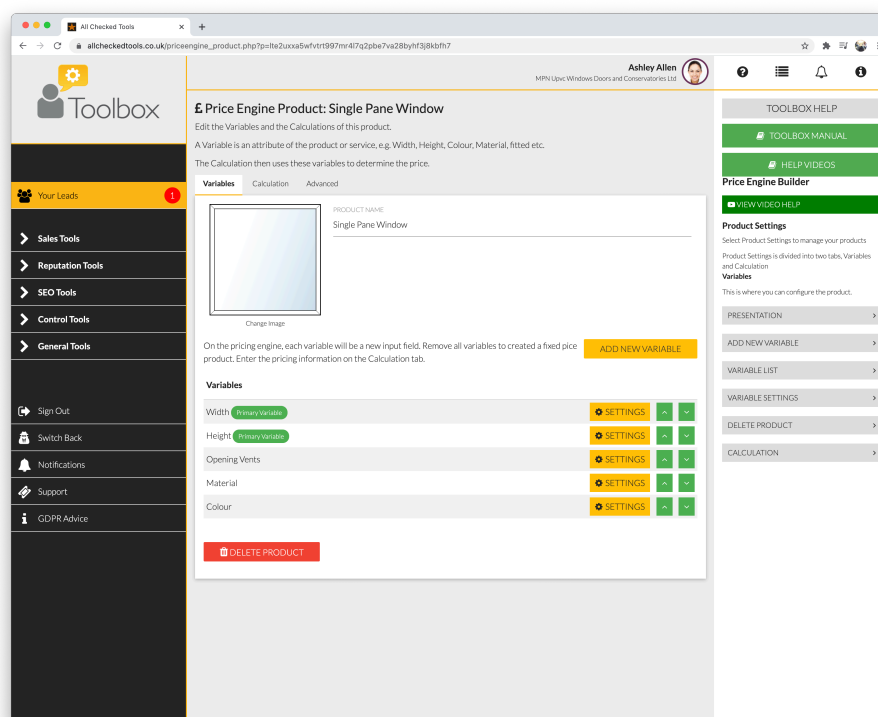
Arranging Products:

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 (Fig 14), where you can edit all the various element of the product and set individual pricing controls.

FIG 14. PRODUCTS



Price Engine Settings (Fig 15)

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

FIG 15. PRICE ENGINE SETTINGS

The screenshot shows the 'Price Engine Builder' settings page within the 'Toolbox' application. The page is titled 'Price Engine Builder' and includes a subtitle 'Adjust your online pricing engine settings, products and prices.' The main content area is divided into several sections: 'Currency' (with a dropdown menu set to '£ - Pounds'), 'Data Protection Opt-in' (with a toggle switch set to 'ON'), 'Data Protection Opt-in Text' (with a text input field containing 'Opt-in to future emails from us containing offers and new products.'), 'Finish Button Text' (with a text input field containing 'Finish >>'), and 'Finish Button URL' (with a text input field containing '/thanks.php'). At the bottom, there is a section for 'Show login form before allowing customers to get a price.' with a toggle switch set to 'ON'. The left sidebar contains various tool categories like 'Sales Tools', 'Reputation Tools', 'SEO Tools', 'Control Tools', and 'General Tools'. The right sidebar contains 'TOOLBOX HELP' links and 'Price Engine Builder' 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 LOGIN FORM

You can choose whether or not to display this information.

SHOW 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 % shift 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 instruction 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.

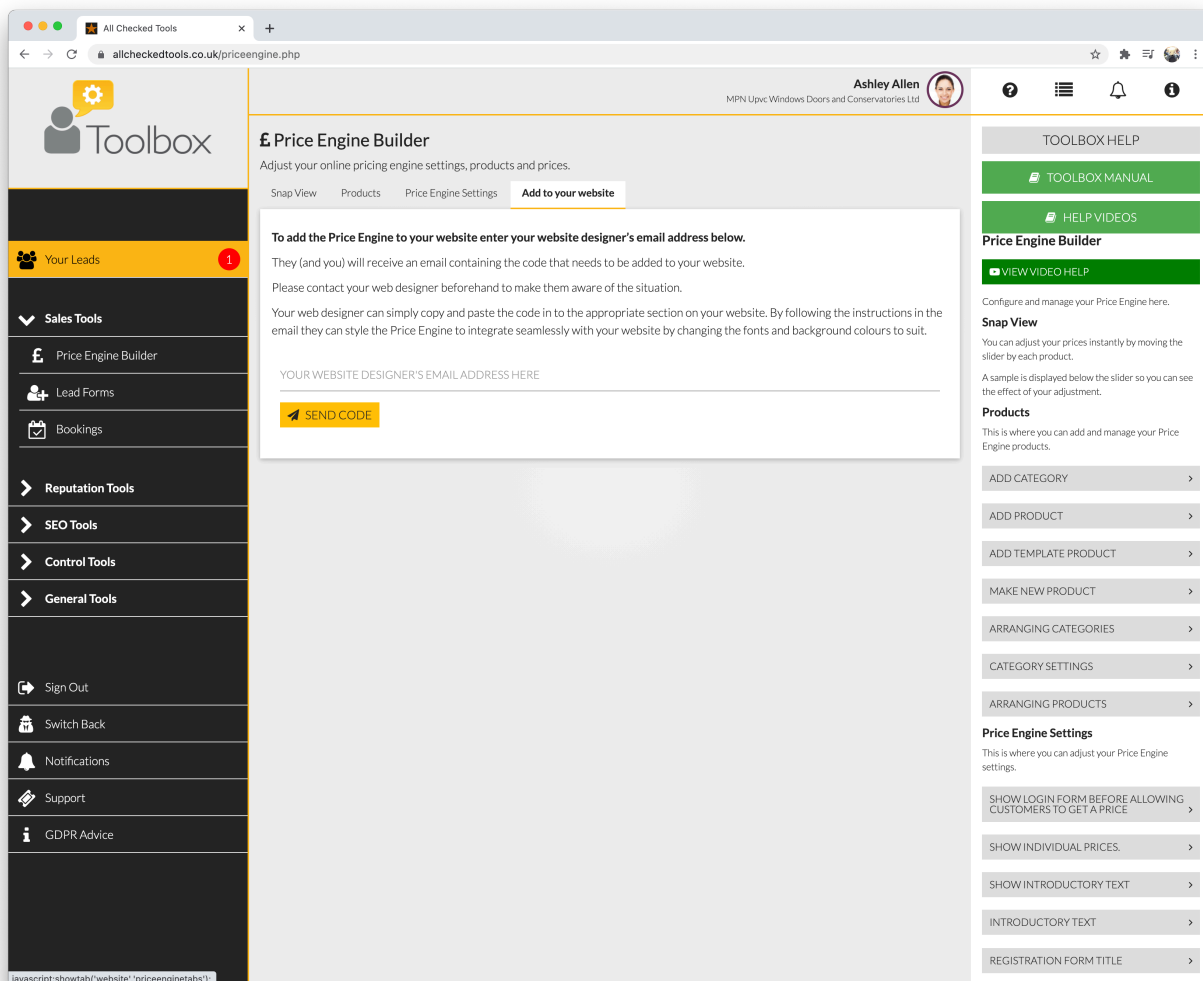
FINISH BUTTON URL

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

Add to your website (Fig 16)

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 16. ADD TO YOUR WEBSITE



Lead Forms

Use this tool to add forms to your website to encourage customers to make an enquiry. Any leads generated via Forms will be delivered to “Your Leads” in your Toolbox.

To get started, select a form type (or create your own call to action) and enter your web designer’s email address to automatically send them the correct source code. (Fig 22)

FIG 22. LEAD FORMS

The screenshot shows a web browser window with the URL `allcheckedtools.co.uk/leadform.php`. The page is titled "Lead Forms" and features a sidebar on the left with the "Toolbox" logo and a list of navigation items: "Your Leads", "Sales Tools" (expanded), "Price Engine Builder", "Lead Forms", "Bookings", "Reputation Tools", "SEO Tools", "Control Tools", "General Tools", "Sign Out", "Switch Back", "Notifications", "Support", and "GDPR Advice". The main content area contains instructions: "Use this tool to add Lead Forms to your website to encourage customers to make an enquiry. Any leads generated via Lead Forms will be delivered to 'Your Leads' in your Toolbox." and "To get started select a form type (or create your own call to action) and enter your web designer's email address to automatically send him/her the correct source code. It's a good idea to call your web designer to confirm your intentions before sending the code." Below this is a form with a "SELECT TYPE" dropdown menu (placeholder: "Please select type"), a text input field for "YOUR WEB DESIGNERS EMAIL ADDRESS", and a yellow "SEND CODE" button. The top right of the page shows the user profile "Ashley Allen" with the role "AWC Home Improvements" and icons for help, menu, notifications, and user settings. On the right side, there is a "TOOLBOX HELP" section with links to "TOOLBOX MANUAL" and "HELP VIDEOS".

Toolbox Settings

This is where authorised users can manage the Toolbox Settings.

You (Fig 5)

This is where you can amend your personal details.

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

FIG 5. TOOLBOX SETTINGS, YOU TAB

The screenshot displays the 'Toolbox Settings' interface for the 'You' tab. The left sidebar lists various tool categories and settings. The main content area is titled 'Settings' and 'You' tab is selected. It contains fields for personal details: Title (Mr.), First Name (Ashley), Last Name (Allen), Login Email (ashley@allcraftsmen.co.uk), Primary Phone (0789456466), Primary Colour (#6b335e), and Open Leads in New Tab (Yes). There is a section for 'PICTURE' with a dashed box for dragging a file and a circular profile picture of a woman. The right sidebar contains 'Toolbox Help' links, 'Toolbox Settings' section with 'View Video Help', and sections for 'Offices', 'Users', and 'Organisation' with various management buttons.

Company (Fig 6)

This is where the main contact can set-up and manage Toolbox users for your Company.

This section is divided into two groups: Offices and Users.

FIG 6. TOOLBOX SETTINGS, COMPANY TAB (OFFICES)

The screenshot displays the 'Toolbox Settings' interface for the 'Company' tab. The main content area is divided into two sections: 'Offices' and 'Users'.

Offices Section:

- Header: 'Offices' with a '+ ADD OFFICE' button.
- Text: 'Use this section to change office settings.'
- Table:

Office	Users	Primary User	
Birmingham	0	Sarah Allen	SETTINGS
Coalville Office	2	Heather Allen	SETTINGS
Leicester	0	Greg Allen	SETTINGS
London Office	0	Ruth Bradley	SETTINGS
Main Office	9	Ashley Allen	SETTINGS (★ Head Office)
Rugby Office	4	Ashley Allen	SETTINGS

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Users Section:

- Header: 'Users' with a '+ ADD USER' button.
- Text: 'Use this section to change user settings. if you change a user's login email address you'll need to verify that email address. We'll send a link to the new email address with verification instructions. The change of email address will not be reflected on this screen until it has been verified.'
- Table:

Name	Office	Last Login	
<input type="checkbox"/> A TEST	Main Office	Resend Email	SETTINGS
<input type="checkbox"/> ACCOUNTS ACCOUNTS	Main Office	12/03/2021	SETTINGS
<input type="checkbox"/> ADRIAN MATTOCK	Main Office	Resend Email	SETTINGS
<input type="checkbox"/> ASHLEY ALLEN	Coalville Office	Online now	SETTINGS
<input type="checkbox"/> GREG ALLEN	Rugby Office	19/03/2021	SETTINGS
<input type="checkbox"/> HEATHER ALLEN	Rugby Office	20/08/2020	SETTINGS

Right-hand Sidebar:

- TOOLBOX HELP
- TOOLBOX MANUAL
- HELP VIDEOS
- Toolbox Settings
- VIEW VIDEO HELP
- You
- Company
- Offices
- Users
- Organisation

Offices: Your Main office is already set-up on the Toolbox but you can set up extra offices to group users together.

This is especially useful if you have multiple branches within your organisation.

To add an office:

- Select + ADD OFFICE to set-up a new office.
- Click OFFICE NAME to add a name.
- Select THIS IS THE HEAD OFFICE to change your Head Office to this one.

- Click POSTCODE to enter the postcode and then click FIND ADDRESS to add the address.
- Select ADD OFFICE to finish.

To edit an office:

- Select the appropriate OFFICE SETTING link on the Office Chart to alter an existing office. Click OFFICE NAME to change the name.
- Select THIS IS THE HEAD OFFICE to change your Head Office to this one.
- Click PRIMARY USER to change the primary user
- Click PRIMARY COLOUR to change the primary colour
- Click PRIMARY ADDRESS CHANGE to change the address
- Click POSTCODE to enter the postcode and then Click FIND ADDRESS to add the address
- Select SAVE SETTINGS to finish

Users: (Fig 7) Setting up accounts for each person in your company who uses the Toolbox keeps your Toolbox secure and help you organise and keep track of actions within your Toolbox.

FIG 7. TOOLBOX SETTINGS, COMPANY TAB (USERS)

The screenshot displays the 'All Checked Tools' Toolbox settings interface. The main content area is titled 'Users' and includes a table of active users. Below the table is a 'Suspended Users' section. The left sidebar provides navigation for various toolbox features, while the right sidebar offers help and additional settings options.

Name	Office	Last Login	Settings
A TEST	Main Office	Resend Email	SETTINGS
ACCOUNTS ACCOUNTS	Main Office	12/03/2021	SETTINGS
ADRIAN MATTOCK	Main Office	Resend Email	SETTINGS
ASHLEY ALLEN	Coalville Office	Online Now	SETTINGS
GREG ALLEN	Rugby Office	19/03/2021	SETTINGS
HEATHER ALLEN	Rugby Office	20/08/2020	SETTINGS
JOE ALLEN	Main Office	10/03/2021	SETTINGS
SARAH ALLEN	Main Office	15/02/2019	SETTINGS

Suspended Users

Name	Office	Last Login
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To add a new user:

- Select +ADD USER to add a new 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 users to log them out of the Toolbox and prevent them from logging back in. To do this tick a user on the User Chart and select SUSPEND SELECTED.

To reinstate a user:

Tick a user on the Suspended Users Chart and select REINSTATE SELECTED to reinstate them.

Permissions

Here you can set which tools and actions are available to which users. For example, a sales person will require access to fresh leads whereas an accountant may only require access to the billing tool. (Fig 8)

Some tools have sub-permissions. For example, you may want someone to be able to see your leads, but not update, delete or transfer them.

You can only set permissions for tools you have permission to access.

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 8. PERMISSIONS

