Using the Business Directory

To pre-load businesses into the directory

This can be done by a site admin level user. You will select this command from the management menu at the top of the window: Content -> Add Content -> Business Listing   and complete the form.

Notes:

- A business can be listed in more than one category so you can check any category that applies.

- A new business listing is, by default, unpublished. You must publish the new entry after you have saved it for it to appear in the directory.

- If you leave a business listing unpublished then you can go back to it at a later time through the management menu: Content. You can filter on Unpublished content or Business Listings if you do not see the business you are looking for in the content list.

To register as a Business Owner using the site's account registration

Business owners will want to register for an account on your website so that they can add new business listings and maintain existing listings. They will apply through the Register link which will usually be found near the Login link. The business owner will be asked to provide a username and email address. They should also check the box labeled "I would like to submit my business listing information." This will notify the town of their intent and will also flag the account as a 'Business Admin' account.

Your site admins will receive email notifying them that a new user account is waiting for approval.   If they need to contact the applicant they can use the email address provided on the registration page. They can activate the account through the People management menu – simply click the Active radio button and then click Save at the bottom of the screen.

Important – If the 'Business Admin' role is not enabled for a user account then that user will not be able to submit new business listings or edit existing listings. If the site admin determines that an account request was entered by a business owner they should make sure the 'Business Admin' role is activated when they approve the account.

When the account is approved the business owner will receive email with a link allowing them to set their password.

Creating a user account and granting access to the business directory

If the business owner did not use the site-provided account request page then a site admin will need to create a user account for them. From the administrative menu at the top of the page, select People – Add User. Enter a username and email address for the new account.   Both of these must be unique – that is, not already in use by any other accounts. You can enter a password if you choose to but the

system will automatically set one if you leave those fields blank. Check the box 'Notify user of new account' if you want the system to send the new user an email notification. Check the box 'I would like to submit my business listing information.' This must be done to allow the user to submit new business listings or to edit existing listings.

To submit a business listing for the website

After they are logged in a business owner can review existing business listings and submit new listings by clicking on the 'My Account' link. They will see a region on the right side of the account screen labeled 'My Business Listings'. To begin, the business owner will click 'Submit a new business listing'.

The business owner will complete the same business listing screen that was referenced above and click Save and Close at the bottom of the screen. A new business listing is, by default, unpublished until it has been reviewed by a site admin.   The business owner can return to the 'My Account' page which will allow them to view and edit their existing listings, including any that are unpublished. They can also submit additional business listings from this screen.

To approve a business listing

Your site admins will receive email notifying them that a new business listing is waiting for their review. This email will contain a link directly to the new listing. The site admin will have the opportunity to edit the listing prior to approving it. To approve the listing they will click the Publish link on the right side of the screen. The business owner will receive email notifying them that their business has been approved on the website.

To maintain an existing business listing

The business owner can easily maintain their own listings on the website by logging into the site and clicking the edit link which can be accessed from their 'My Account' page. They will also see an edit link next to their businesses when logged in and viewing the business directory.

NOTE - when a business listing is updated the site admins will receive email notifying them that an update was made. The email will contain a link to the specific listing that was changed so they can review the update if they choose to.

To transfer ownership of a business listing

 A business listing can be maintained by its owner and the site admins. To transfer ownership of the listing to another user account the site admin will edit the business listing. From the edit screen they will select the 'Authoring Information' tab and removed the existing 'Authored by' value. They should start to type in the new owner's userid and system will display a list of user accounts that match what was entered. Select the correct account and click 'Save and Close' at the bottom of the window. The user will then be able to maintain the listing as described above.