infoengine.cymru infoengine.wales

voluntary services at your fingertips

gwasanaethau Gwirfoddol ar flaenau eich bysedd
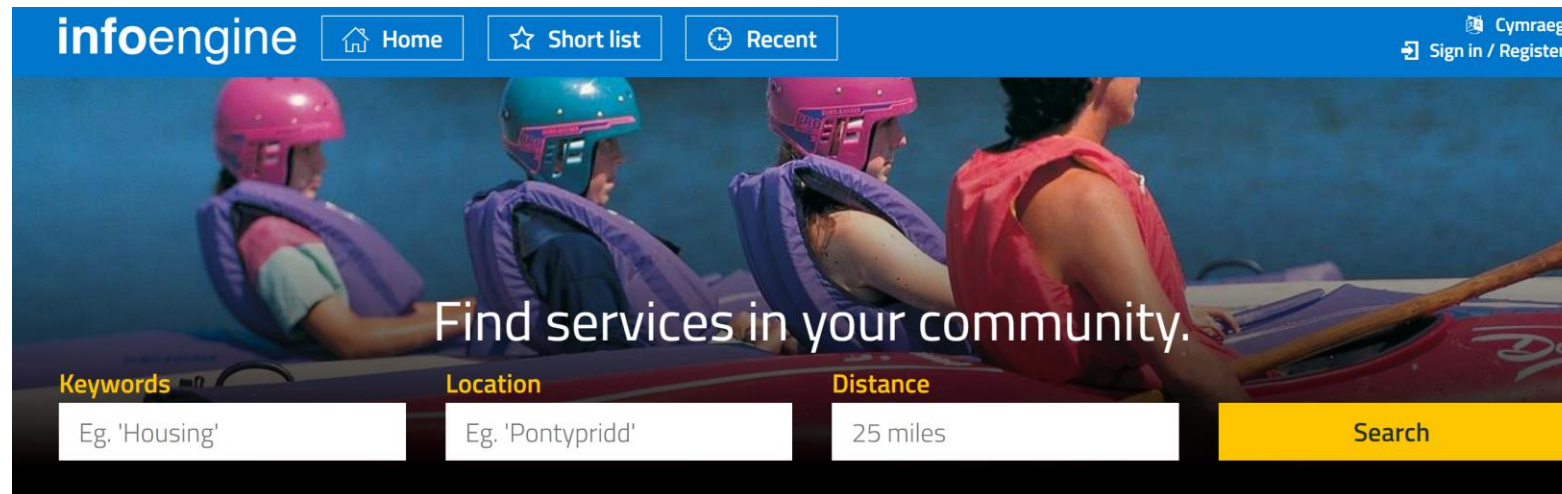
How to register on infoengine.wales

This guide shows you how to:

*Create an account

*Create an Organisation profile

TO REGISTER FOR AN ACCOUNT
On the Infoengine front page click **Register now**

Create an account

Create an account

Select the correct account

Complete mandatory fields

Create an account

Do you want to register an organisation or create a shortlist account?

Organisation Account ⓘ Create organisations or services	Shortlist Account ⓘ Create shortlists

Your login details

Fields marked ⚠ are required.

Email address ⚠

Password ⚠

Confirm password

A Shortlist account does not allow you to create an organisation or service. This is for creating, saving and sharing shortlists only.

About your organisation

The ability to complete in Welsh will follow after initial info is saved

If you complete long description it will auto fill the short description

Where there is a red warning triangle this denotes a mandatory field.

About your organisation

Name of your organisation (in English) ⚠

The organisation field is required.

Long description of your organisation ⚠

The long description of your organisation will appear on your organisation's profile page on infoengine

The long description field is required.

Address ⚠️

The address one field is required.

Address line 2

Town

County (organisation headquarters) ⚠️

▼

The county field is required.

Postcode ⚠️

The postcode field is required.

I'm not a robot
reCAPTCHA
Privacy - Terms

Make sure you select the County

Complete the Captcha box

Click to agree the terms and conditions.

☐ I agree to the terms and conditions
You must accept the terms and conditions.

Then click **CREATE ACCOUNT**

Create account

Please note: The terms and conditions are available on the front page of the website, bottom right hand corner (see below)

About infoengine ⚠️

About us
Contact us
Help
Terms and Conditions
Register your service
The infoengine widget

CREATING AN ORGANISATION PROFILE

infoengine

Home | Short list | Recent | Cymraeg

Organisations

Services

Locations

Short list

My account

Sign out

Warning This organisation cannot be published until it has a complete profile. Please update the organisation profile.

Organisations

+ Create new organisation

Type to search...

Organisation name	Published?	Last Updated	Dewis Imported?		
Clair test Gofod	No	1 second ago	No	Edit	Delete

From this screen please click **EDIT** to continue entering your organisational details. Info will **NOT** be published until the next sections are complete.

Information will **NOT** be shared with Dewis until your profile is completed. You will then be asked about sharing your info with Dewis.Cymru
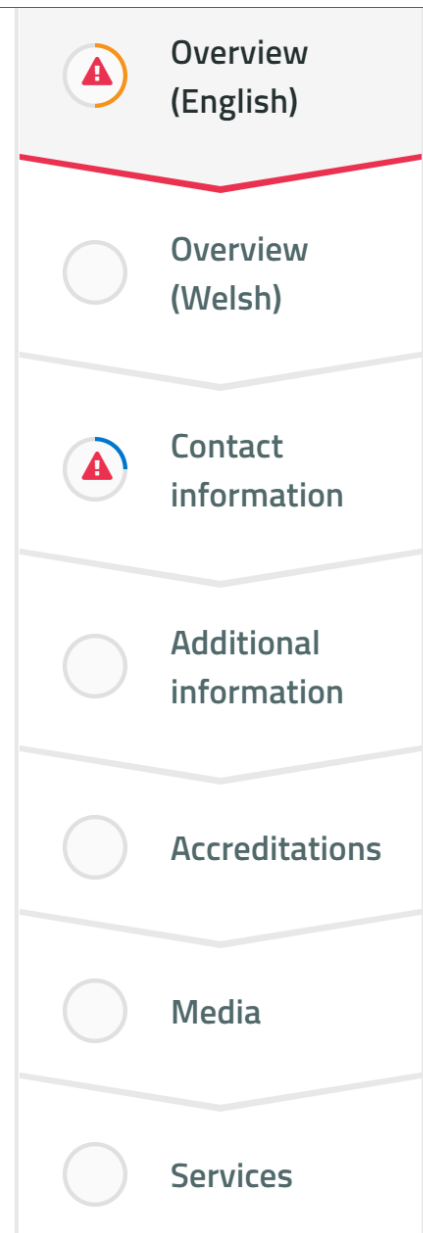
Overview (English)

This information is for the user to understand your offering. It will also help Infoengine determine when to show your organisation in the search results.

Ensure you provide Welsh translations of this information in the next step as your organisation will be viewable in both Welsh and English.

Fields marked ⚠ are required.

Organisation name ✔

Clair test Gofod

This is how your organisation's name will appear on infoengine

Tabs (left navigation)

- ⚠ Overview (English)
- Overview (Welsh)
- ⚠ Contact information
- Additional information
- Accreditations
- Media
- Services

Now complete the description section.

If you put information in the long description it will copy first few lines into the short description.

Then **add** your Keywords.

Short description of your organisation

The short description of your organisation will appear in search results and other listings on infoengine. If you do not supply a short description, it will be generated automatically from the opening words of your long description. Please note that you can only use a maximum of 225 characters.

Long description of your organisation ✔

test test test

The long description of your organisation will appear on your organisation's profile page on infoengine

Keywords

These Keywords will be private and used for infoengine only. When a user searches in infoengine, the system will check for relevancy with Keywords. Tag your organisation with Keywords that are relevant to your organisation and you will appear in the search results for the right search terms.

You will see these tabs to the left of the screen. As you complete each section the tab will move down. You **MUST** complete the tabs with the mandatory fields (warning triangle)

Now select the categories you wish to register your organisation under. You can select up to three categories from the drop down list.

Categories ⚠

Click in the box to select up to three categories

Is your organisation known by any other name?

This will help users find your organisation who may be searching using an acronym or alias

Remember to include any acronyms or alias's your organisation may use:

eg PAVO – Powys Association of Voluntary Organisations

I confirm the organisation or service I am registering is a third sector organisation or service (voluntary, charity, community group, not-for-profit, cooperatives, social enterprise).

☐ **Confirm**

If you are not a 3rd sector organisation, please register with our partner, **Dewis**
Would you like your listing also to be displayed on Dewis, our partner site? ⚠

◯ Yes   ◯ No

Save draft ✔   **Save & continue** ❯

Once you have confirmed that you are a third sector organisation you can then confirm if you wish for your information to be shared with Dewis.

REMEMBER……
When complete CLICK Save & Continue or Save Draft if you wish to leave and return to complete at a later date.
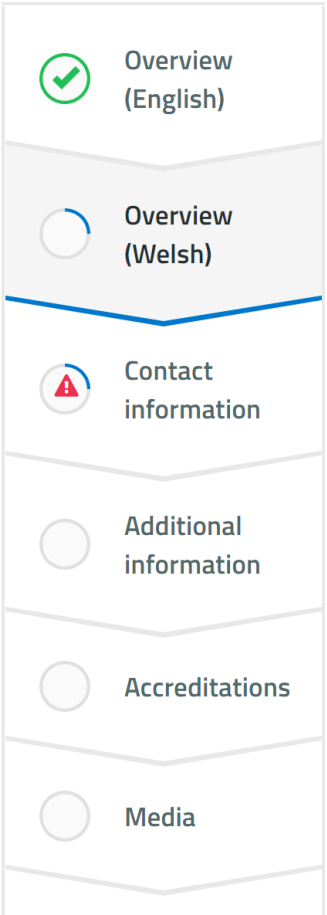
8

Well done – you have saved your Organisation overview.

ADD OVERVIEW INFORMATION IN WELSH

You will now see the Overview information in Welsh – please where possible add the organisation information in Welsh. (this is NOT mandatory so if you do not have this info please continue as below)

When complete CLICK Save & Continue or Save Draft if you wish to leave and return to complete at a later date.

Clair test Gofod

Status: **Draft**

Publish

- ✓ Overview (English)
- ◔ Overview (Welsh)
- ⚠ Contact information
- ○ Additional information
- ○ Accreditations
- ○ Media

Overview (Welsh)

This information is for the user to understand your offering. It will also help Infoengine determine when to show your organisation in the search results.

Organisation name

This is how your organisation's name will appear on infoengine if the user is browsing in Welsh

Short description of your organisation

The short description of your organisation will appear in search results and other listings on infoengine if the user is browsing in Welsh. If you do not supply a short description, it will be generated automatically from the opening words of your long description. Please note that you can only use a maximum of 225 characters.

ADD YOUR CONTACT INFORMATION

Contact information

This information will allow a user to get in touch your organisation if they are interested in a service you offer. If you do not want a particular contact method shared, you can make it private.

Fields marked ⚠ are required.

Contact name ⚠

Email address ⚠

email@example.com

☐ Keep this private?

If private, this will not be displayed on the site.

Telephone number ⚠

☐ Keep this private?

If private, this will not be displayed on the site.

Website address

http://www.example.com

☐ Keep this private?

If private, this will not be displayed on the site.

Facebook address

https://www.facebook.com/yourpage/

Twitter handle

@

Address

☐ Keep this private?

If private, this will not be displayed on the site.

Address ✔

****

Address line 2

****

Town

County ✔

Powys

Postcode ✔

You will now need to enter your contact details.

Click PRIVATE if you DO NOT wish for the details to show on the public side on the site

You MUST enter a contact name, email address and telephone number

Please include as much information as possible as it will make your public page more informative

Save draft ✔   **Save & continue** ❯

REMEMBER......
When complete CLICK Save & Continue or Save Draft if you wish to leave and return to complete at a later date.

10

ENTER ADDITIONAL INFORMATION

Tendering opportunities

We have contacts that seek applicants for tender and ask for potential organisations from the infoengine network. We put forward appropriate organisations using the information below to determine best fit.

Would your organisation be interested in bidding for future tendering opportunities?

○ Yes ● No

How ready is your organisation for tendering opportunities?

| Please select ▾ |

How much tendering experience does your organisation have?

| Please select ▾ |

How ready is your organisation to tender jointly with partners?

| Please select ▾ |

Additional information about your organisation

As part of our work with the WCVA the following information is required

Your organisation's income band

| Please select ▾ |

Is your organisation incorporated?

○ Yes ● No

Please indicate the legal status of your organisation

Please select all that apply

☐ Charitable incorporated organisation

☐ Community interest company

☐ Company limited by guarantee cooperative

☐ Friendly society

☐ Industrial and provident association

Company number

[ ]

Is your organisation a registered charity?

○ Yes ● No

Registered charity number

[ ]

[Save draft ✔] [Save & continue ❯]

You can now enter information on your interest in tendering opportunities and additional information about your organisation. Please note – this WILL NOT be shared on the public side of the website.

The ONLY information from this section that will be shared on the public side of the site will be your Company Number and Registered Charity Number (if you have one and record it)

REMEMBER......
When complete CLICK Save & Continue or Save Draft if you wish to leave and return to complete at a later date.

ADD YOUR ACCREDITATIONS

Accreditations

Accreditations appear on your organisations page to allow users to see how established or qualified you are at a glance.

Please select the accreditations that you wish to display on your organisation's profile page. If you cannot find a particular accreditation please get in touch with

infoengine@pavo.org.uk

Add accreditation ✚

Save draft ✔   **Save & continue** ❯

Accreditations – if your organisation has an accreditation eg Investors in People you can now enter it at this section.

Click on **ADD ACCREDITATION** and a drop down list will appear. If your accreditation is not listed please contact PAVO and they will be able to add this for you.

REMEMBER......
When complete CLICK Save & Continue or Save Draft if you wish to leave and return to complete at a later date.

ALMOST THERE...... **UPLOADING A LOGO**

You can now upload your Organisations logo and an image for the header – these will show on the public page. While not required, it is strongly advised you provide a logo, as doing so raises the chances of your organisation being recognised quickly.

Media

Personalise your organisation listing and its page by uploading your logo and a cover image. You can also provide a leaflet for users to download.

Logo

Choose file | No file chosen

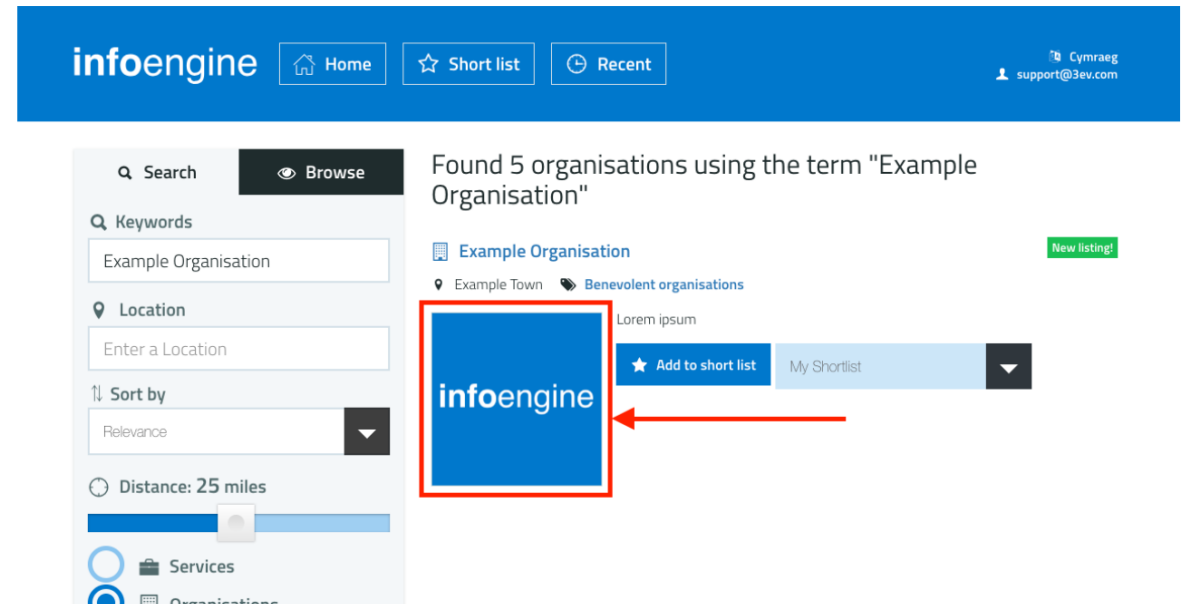Allowed formats: jpeg, png, gif.
Maximum file size: 10MB.
Recommended maximum file size: 2MB
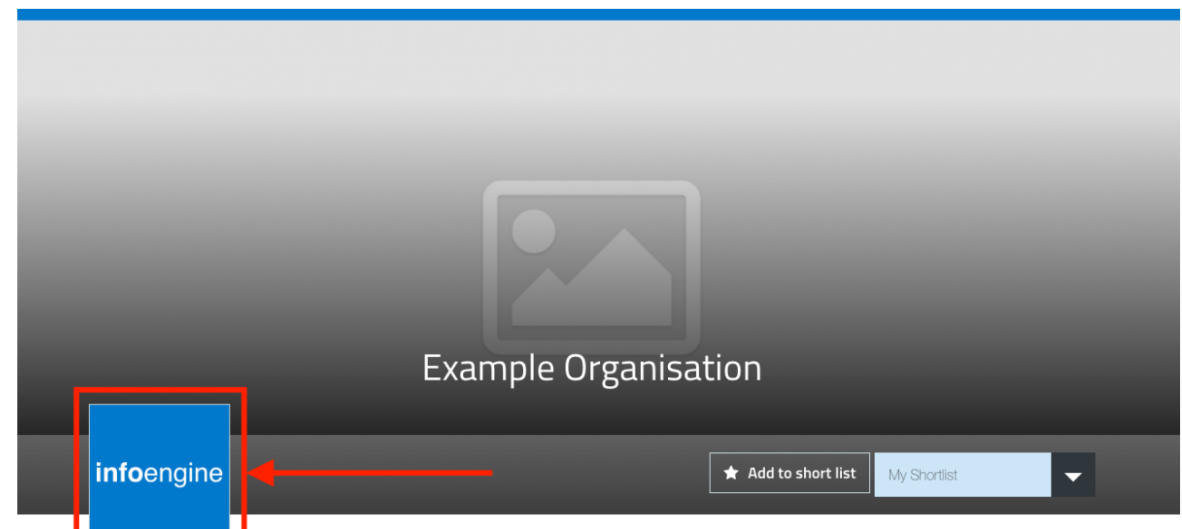Recommended dimensions: 200 x 200

Logos are displayed when your organisation appears in search results...

Check out the formats that are accepted.

Logos are displayed when your organisation appears in search results...

...and on the organisation's page

You can now repeat the process to **ADD A COVER PHOTO**

ADDING/UPLOADING A LEAFLET

You can add a downloadable leaflet to your organisation page via the form below. This will give users access to any additional information about your organisation.

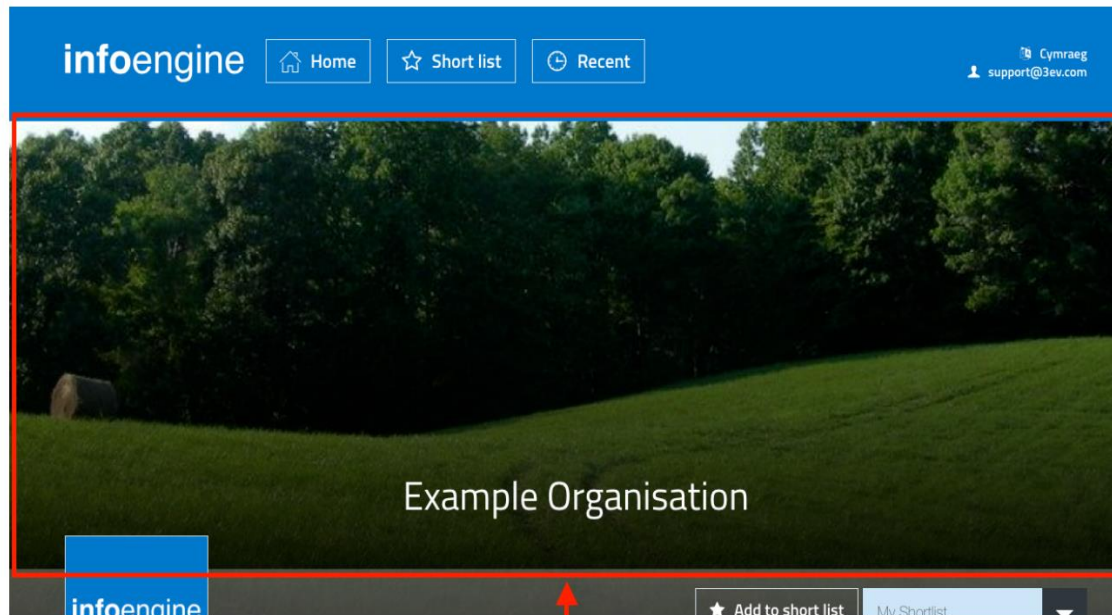**Upload a cover photo**

Choose file No file chosen

Allowed formats: jpeg, png, gif.
Maximum file size: 10MB.
Recommended maximum file size: 2MB
Recommended dimensions: 1300 x 500

Your organisation profile page will have a cover photo at the top which will sit behind your organisation name.

Leaflet (English)

Choose file No file chosen

Allowed formats: pdf, doc, docx, jpeg.
Maximum file size: 10MB.
Recommended maximum file size: 2MB.

Leaflet (Welsh)

Choose file No file chosen

Allowed formats: pdf, doc, docx, jpeg.
Maximum file size: 10MB.
Recommended maximum file size: 2MB.

Save draft ✔

Save & continue ➤

REMEMBER......
When complete CLICK Save & Continue or Save Draft if you wish to leave and return to complete at a later date.

infoengine ⌂ Home ☆ Short list ⊘ Recent ▢ Cymraeg 👤 support@3ev.com

Example Organisation

infoengine ★ Add to short list My Shortlist

PUBLISHING YOUR ORGANISTION

Once you have followed these steps and **SAVED** your information please scroll to the top of the page where you will see this warning if you have not completed the **MANDATORY** fields.

The warning triangle will also draw your attention to the field that need completing.

Warning This organisation cannot be published until it has a complete profile. Please update the organisation profile.

The organisation was updated successfully. ✕

Clair test Gofod

Status: **Draft** Publish ⎘

If all fields are completed correctly you will see this information at the top of your page....

The organisation was updated successfully. ✕

Clair test Gofod

Status: **Draft**   Not Published ⎘

✓ Overview (English)   **Overview (English)**

NOW click on Not Published and this will change to green and state Published – your info will now be live once approved by the Infoengine admin team – Congratulations!

The organisation was published successfully. ✕

You have not yet created any services. Click **"Create new service"** to get started.

Create new service ✚

Clair test Gofod

Status: Pending approval   Published ✔

✓ Overview (English)   **Overview (English)**

infoengine.cymru infoengine.wales

For further information or support please contact us on:

Tel: 01597 822191

Email: Infoengine@pavo.org.uk

Twitter: @infoengine1