

### WELCOME TO THE MEMBERS SERVICE GUIDE.

This guide will tell you more about the services currently available to members, how they work, how you enter information and administer your site entry. This section deals with entering, amending and deleting articles.

This help section is relevant for Members, Finance Members and Special Services Members.

### CONTENTS

#### [Introduction](#)

#### [Article example](#)

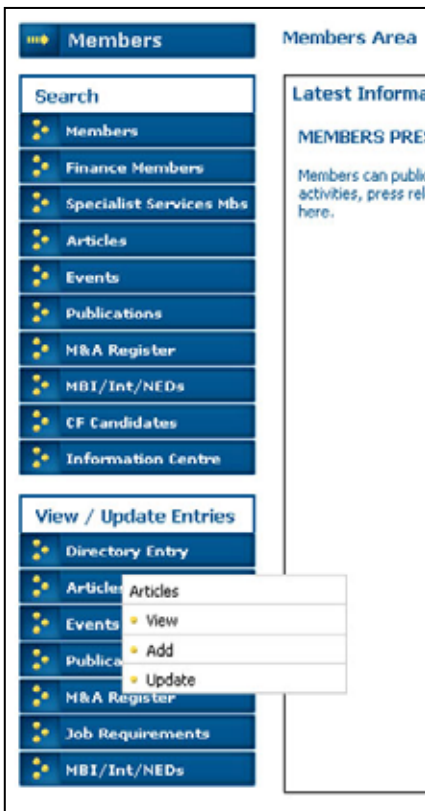
#### [Adding an Article](#)

#### [Article contents](#)

#### [Editing Articles](#)

### INTRODUCTION

#### *Why are articles important?*



Articles are important as they are a key part of attracting potential users of advisers' services and those looking for finance to the website. They are important for you in getting visitors to contact you whether by using the email link on the article, the website link, by drawing them to your directory entry or through a reference to a publication. They are an opportunity to demonstrate your expertise and experience and to differentiate your operations from those of your competitors.

#### *Where on the web site do I add an article?*

Articles are entered from the Members Area using an administrator log in.

On the Members home page, select articles from the view / update entries menu. This will bring up three choices, view your existing articles, update an article or add a new article. Select Add.

#### *How are articles created?*

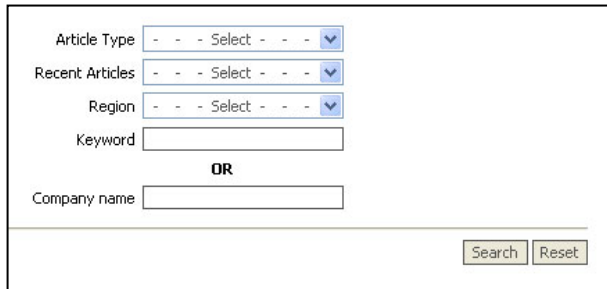
Articles are created through an online input fore select article. This is discussed further below.

#### *Should I prepare my article first or type it online?*

You can type it on line but we recommend you prepare it first in a programme such as word. You will find it easier to use, it has functions such as spell check which are not available within the online input and you will retain a copy which will make future changes easier.

**ARTICLE EXAMPLE**

**How do visitors to the website find my articles?**

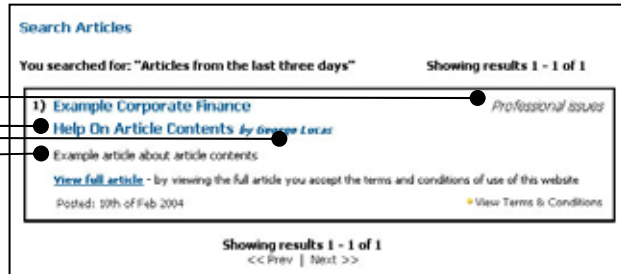


The articles search page enables selection of articles by a range of criteria including Keyword.

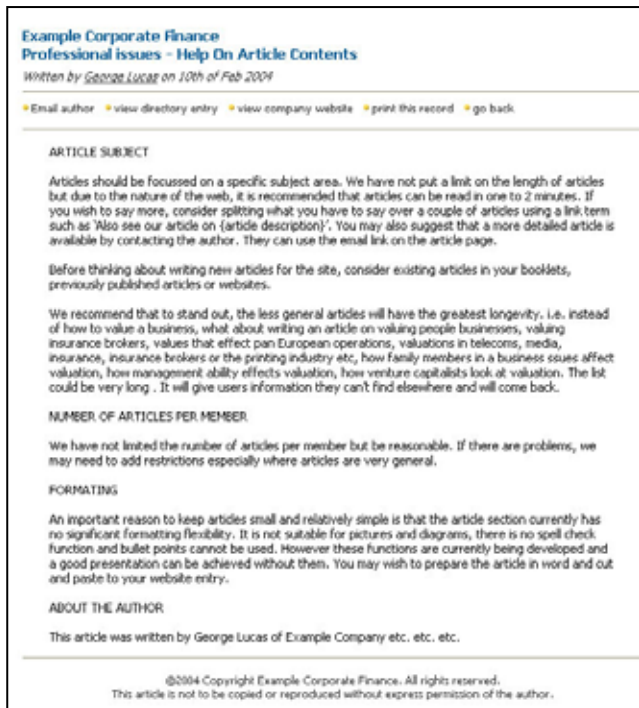
If you have chosen to make your article member only, your article will only come up on a search carried out by a logged in member.

When visitors to the site complete a search, they are shown a list of matching articles with information such as in this example

The input fields shown on the summary are:  
 Type of Article \_\_\_\_\_  
 Article subject \_\_\_\_\_  
 Author of article \_\_\_\_\_  
 Article description \_\_\_\_\_



**What will the full article look like?**



Viewing full article will display a page similar to this example:-

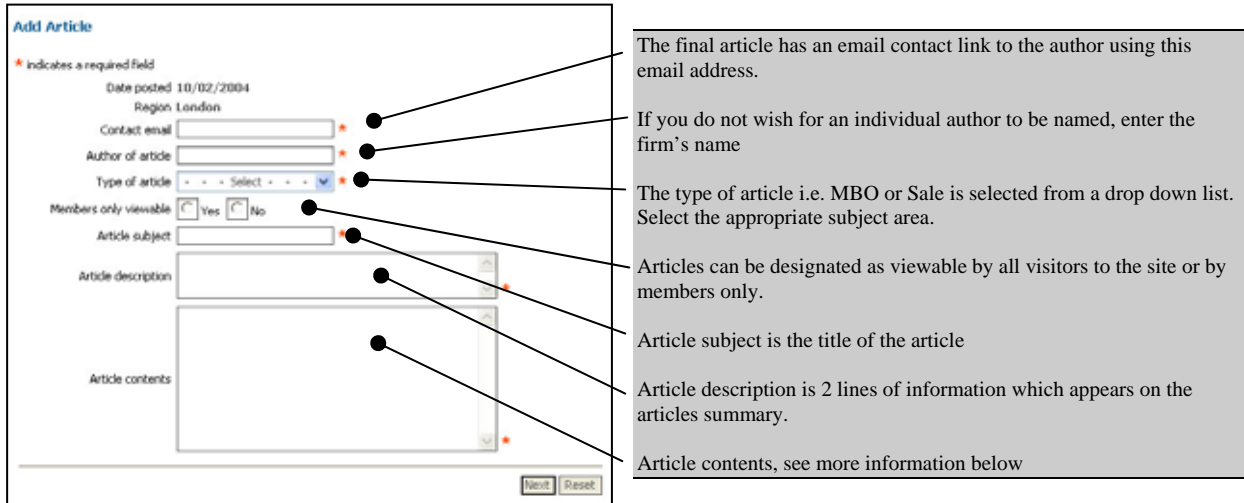
The full article includes an email link to the author as well as the author of article, type of article, article subject and article contents.

Where articles are produced by special services members, only signed in members can access the directory entry.

## ADDING AN ARTICLE

### *What does the input page look like?*

The article is entered using the following input form:



The screenshot shows the 'Add Article' form with the following fields and callouts:

- Date posted:** 10/02/2004
- Region:** London
- Contact email:** [Text input field] \* (Callout: The final article has an email contact link to the author using this email address.)
- Author of article:** [Text input field] \* (Callout: If you do not wish for an individual author to be named, enter the firm's name)
- Type of article:** [Dropdown menu: Select] \* (Callout: The type of article i.e. MBO or Sale is selected from a drop down list. Select the appropriate subject area.)
- Members only viewable:**  Yes  No (Callout: Articles can be designated as viewable by all visitors to the site or by members only.)
- Article subject:** [Text input field] \* (Callout: Article subject is the title of the article)
- Article description:** [Two-line text area] \* (Callout: Article description is 2 lines of information which appears on the articles summary.)
- Article contents:** [Large text area] \* (Callout: Article contents, see more information below)

Buttons: Next, Reset

## ARTICLE CONTENTS

### *What type of subject is recommended?*

Articles should be focussed on a specific subject area.

Before thinking about writing new articles for the site, consider existing articles in your booklets, previously published articles or website information.

We recommend that to stand out, the less general articles will have the greatest longevity. i.e. instead of how to value a business, what about writing an article on valuing people businesses, valuing insurance brokers, values that effect pan European operations, valuations in telecoms, media, insurance, insurance brokers or the printing industry etc, how family issues in a business can effect valuation, how management ability effects valuation, how venture capitalists look at valuation.

### *How long should articles be?*

We have not put a limit on the length of articles but it is recommended that articles can be read in one to 2 minutes.

If you wish to say more, consider splitting what you have to say over a couple of articles using a link term such as 'Also see our article on {article subject}'.

You may also suggest that a more detailed article is available by contacting the author or the full article can be found in our publications section or by emailing the author. Readers can use the email link on the article page.

***How many articles are permitted per Member?***

We have not currently limited the number of articles per member. If there is an imbalance, we may need to add restrictions.

***What formatting is available?***

An important reason to keep articles small and relatively simple is that the article section has limited formatting flexibility. It is not suitable for pictures and diagrams, there is no spell check function, bold and bullet points cannot be used. However, a good presentation can be achieved without them.

If you have an article that needs formatting or diagrams, consider adding this to the publications section.

***What disclaimers are there?***

To view the full article; the reader has to accept the terms and conditions of use of the website. You need to be happy on your own account as to the strength of the disclaimer included re the use of the information on the site.

If in any doubt you should add your own disclaimer to your article.

***What Copyright protection is there?***

Your article will automatically include in its footer a note saying Copyright {Company Name} {Year of article submitted} along with the text 'This article is to be copied or reproduced without the express permission of the author

***Do CF connect check all articles?***

CF Connect will not necessarily edit or check the content or format of the articles submitted and that will remain the responsibility of the author.

***Can I add information about the author?***

Certainly, add a few lines about the author and give the reader a suggestion as to what to do next to find out more. Remember, the reader of members' and finance members' articles have access to your directory entry. All member groups have a link to your website and potential customers can email the author from the article page.

***Can I use an article to advertise my activities?***

No. The article must contain useful information for a reader and cannot merely be an advert. Articles should demonstrate knowledge, experience and expertise, not just wave a flag. It is perfectly acceptable and encouraged to do a case study of a deal provided it covers issues such as how a deal works the problems that occur and how they were solved.

**Will you remove any articles?**

CFconnect will need to remove articles from time to time to maintain the balance, quality and dynamics of the information on the website. We may remove articles at our discretion. The reasons may include but are not limited to:

- They are adverts and provide no useful advice for the reader
- They contain negative comments against other professionals
- We have been informed that there are errors on the article or that it is misleading
- there are an excessive number of articles on a specific subject
- An article has dated, (we have not set an automatic removal date)
- We need to maintain the overall balance of articles on the site

We will notify you of the removal of an article so you can plan to add an alternative article.

**EDITING ARTICLES**

**How do I amend existing articles?**

On the Members home page from the view / update entries menu. This will bring up three choices, view your existing articles, update an article or add a new article. Select Update.



Selecting update will bring up a screen listing all your articles with the title underlined. Select the article to update by clicking on the title.



To select the article you wish to edit, click on the title. This will bring up the Update Article Screen.

Each of the fields can be updated and the changes saved. Please note, the reset button only resets the fields with "Currently set as". It will not reset contents. If you wish to abandon use the back button.

If you wish to delete the article, you must both tick the box and hit the delete button.