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Dashboard User Manual

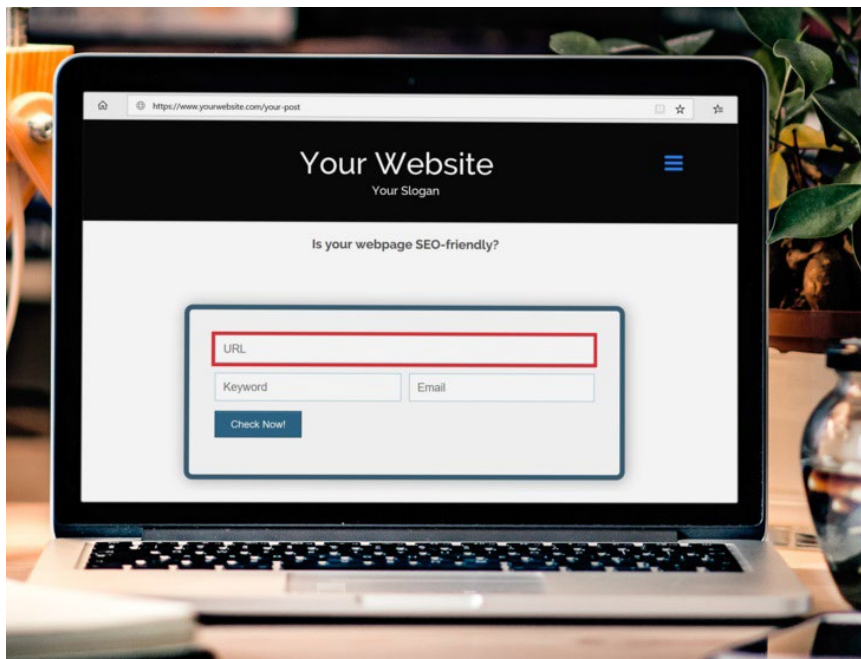| Version	Revision Date	Summary of changes	Updated by
1.0	22 Nov 2022	Manual creation	Billy
2.0	4 Dec 2022	Section 3 – update "embed-code" section to reflect the change in dashboard when generating embed code Section 11 – nearly re-written the whole section and added sub-section 11.1, 11.2 and 11.3 Updated table of content	Billy
3.0	6 Dec 2022	Section 7 – spelling correction and the logic about email notification	Billy

Scan the QR code for up-to-date user manual

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Table of Contents

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1. Purpose

Thank you for using SEOembedder. You have made a good choice as our tools can definitely help you turn your website visitors into leads.

Putting up a SEO auditing tool on your website and letting your website visitors use the tool are what SEOembedder is all about. What you need to do now is to copy a small piece of HTML code from the dashboard and paste it on everywhere you like on your website. The tool will then be displayed on your website as something like what is shown in the picture 1.1 below.

Picture 1.1 – SEOembedder audit tool sample

Users, like your goodself, are required to login to our dashboard to manage their account and to configure the SEOembedder tools. The purpose of this user manual is to help users navigate and use the dashboard easily and correctly. Although it is not necessary for users to read this user manual thoroughly before they start using the tools, users are expected to refer to this document to better understand how to do the configuration more efficiently.

Dashboard Link: https://www.seoembedder.com/portal/dashboard.php

2. Assumption

1. Users must be able to login to dashboard.
2. Users should visit our website (www.seoembedder.com) for the up-to-date version of this document.
3. "SEO Audit tool" (case insensitive) in this document may also be expressed as "SEOembedder tools", "SEO auditing tool", "SEO audit form", "audit tool", "audit form".

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3. Dashboard Home

On Dashboard Home page, users will see a summary table of the plan(s) they have, example shown in picture 3.1 below and options for users to purchase as shown in picture 3.2.

	License Key	Plan Name	Status	Credit Balance	Action
(1)		Free	under review	79	⚙ Setting 🔲 Upgrade ~~Recharge~~ Usage Embed-code Audit
(2)	demo1234	Pro	active	99689	⚙ Setting 🔲 ~~Upgrade~~ Recharge Usage Embed-code Audit
(3)		Pro	active	1998	⚙ Setting 🔲 ~~Upgrade~~ Recharge Usage Embed-code Audit
(4)		Pro	active	11997	⚙ Setting 🔲 ~~Upgrade~~ Recharge Usage Embed-code Audit
(5)		Pro	active	4045	⚙ Setting 🔲 ~~Upgrade~~ Recharge Usage Embed-code Audit
(6)		Growth	active	397	⚙ Setting 🔲 Upgrade Recharge Usage Embed-code Audit
(7)		Growth	active	600	⚙ Setting 🔲 Upgrade Recharge Usage Embed-code Audit
(8)		Basic	active	100	⚙ Setting 🔲 Upgrade Recharge Usage Embed-code Audit
(9)		Basic	active	11	⚙ Setting 🔲 Upgrade Recharge Usage Embed-code Audit
(10)		Pro	active	2000	⚙ Setting 🔲 ~~Upgrade~~ Recharge Usage Embed-code Audit

Picture 3.1 – summary table of plans in dashboard

BASIC $9.9

Usage: 100 audits

Email Alert: No

Lead Generation: No

Customized form: No

Customized report: No

1-Month Unlimited Audits Guarantee: No

Mailchimp Integration: No

BUY NOW

GROWTH $14.9

Usage: 300 audits

Email Alert: No

Lead Generation: No

Customized form: No

Customized report: No

1-Month Unlimited Audits Guarantee: No

Mailchimp Integration: No

BUY NOW

🏆 PRO $19.9

Usage: 2000 audits

Email Alert: Yes

Lead Generation: Yes

Customized form: Yes

Customized report: Yes

1-Month Unlimited Audits Guarantee: Yes

Mailchimp Integration: Yes

BUY NOW

Picture 3.2 – Purchase options

As shown in the picture 3.1, there are different buttons/links in the table which are explained below.

Column Name	Description
License Key	Each plan in the dashboard has a unique license key. A user can have multiple plans, meaning they can have multiple license keys. For example, a new user has a license key for a Free plan and later the user purchases a Basic plan, the dashboard will show two license keys, one for the Free plan, and another one for the Basic plan. However, the user can opt to upgrade an existing plan instead of buying a new plan (i.e. when the user use "Upgrade" button inside the Action column instead of using "BUY NOW" button on the same page). In this case, the license key will remain unchanged after the plan is upgraded.
Plan Name	The column shows which plan a license key belongs to. There are four different plans as shown below.

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	1. **Free plan**: Free service provided right after a new account is created 2. **Basic plan**: Paid service 3. **Growth plan**: Paid service 4. **Pro plan**: Paid service Please refer to the Pricing table (https://www.seoembedder.com/pricing/) for the details of each plan.
Status	It is "active" by default. If a plan does not show an "active" status, the license key may be temporarily disabled.
Credit Balance	This column shows how many audits can be carried out for a license key. A notification regarding low credit balance will be sent by our system to the user if there is 10 credits left. If the credit is used up (i.e. zero credit balance), an error message: "Credits have been used up." will be shown if someone tries to use the audit tool unless the plan is covered by 1-Month Unlimited Audits Guarantee*. *Currently, if a user purchases or recharges a Pro plan, the plan will come with a 1-Month Unlimited Audits Guarantee. It means that if the credit balance is used up within 30 days after purchase or recharge, SEOembedder will ensure the SEO audit tool under this purchased or recharged plan will continue to serve its purpose for the remainder of the 30 days.
Action	⚙️ Setting This will go to the details of a license key where the user can see the information or make some changes to the setting of the license key. Please refer to section 7 below for more information. Upgrade This button will bring the user to a page showing what upgrade options are available. For example, a Free plan can be upgraded to a Basic plan, Growth Plan or Pro plan; A Basic plan can be upgraded to Growth or Pro plan; A Growth plan can be upgraded to a Pro plan. For Pro plan, this button will be ruled a line as upgrade option is not available for a Pro plan. After a successful upgrade, the license key will remain unchanged while the Plan Name will be updated accordingly. Please refer to section 8 below for more details. Recharge This button will bring a user to a page where the user can recharge the service. After a successful recharge, the credit balance will be topped up by the number of credit corresponding to the plan and a new credit balance will be reflected in the dashboard.

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| | For Free plan, this button will be ruled a line as recharge function is not available for a Free plan.

Please refer to section 9 below for more details.

Usage
The usage page shows the details of what SEO audits have been performed such as what website, keyword are used in the SEO audit tool. Users can also download a CSV file containing the usage details.

Please refer to section 10 below for more details.

Embed-Code
Users can generate a new embed code in this page in order to embed the tool on the website. Users need to copy the code and paste it on the website in order to display the SEO audit tool for visitors to use.

Users can fully design their own audit forms. Please refer to the question: "THE DESIGN OF YOUR AUDIT FORM DOES NOT FIT THE LAYOUT OF MY SITE. CAN I FULLY DESIGN MY OWN AUDIT FORM?" under our FAQ page for more details. FAQ page: https://www.seoembedder.com/faq/

For Pro plan, you are strongly encouraged use an up-to-date embed code every time after you have made change to the setting.

We endeavour to make our SEO audit form as responsive to different devices as possible, however, different users may still use various platforms (or even same platform like Wordpress but different themes) to run their websites, therefore, after embedding the code on the website, there maybe still some small issues displaying the tools on their websites. Most common issues are that 1) the audit form is "too big" that block original content or 2) the audit form is "too small" that have too much "white space" below the form. Our section 11 below will guide you through how to easily fix these issues.

Please refer to section 11 below for more details.

Audit
This button will bring you to an actual SEO audit tool. |

4. Blacklist Domain

You can blacklist any website so that your SEO audit tool will not perform an audit for these blacklisted websites. For example, you may not want a visitor to check www.google.com as it will simply waste your credit. If a URL is in your blacklist and a visitor tries to perform an audit for this URL, an error message: "The domain is blacklist, we will not generate report for this domain" will be shown to the visitor.

The blacklist applies to all license keys that you own. In other words, if you have more than one plan, you are unable to blacklist a URL for just one license key, but not for the others.

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5. Profile

This page allows a user to update their profile details as follows:

Fields	Description
Name	Please enter a name that you would like us to address you.
New email	Please enter an email address that you would like us to communicate with you.
Confirm email	This email address must be same as the one you enter in "New Email" field to ensure you have the correct email address in our record.
Your website	A website that you use the SEO audit tool.
Your phone number	Your phone contact number that we can reach you. The phone number should include a country code and area code.
4-digit PIN	During the communication, we may need to verify you. Having this 4-digit PIN will make the verification process easier.
Alternative email	It is a backup email that we need to communicate with you in case your primarily email has any issue.

6. Reset Password

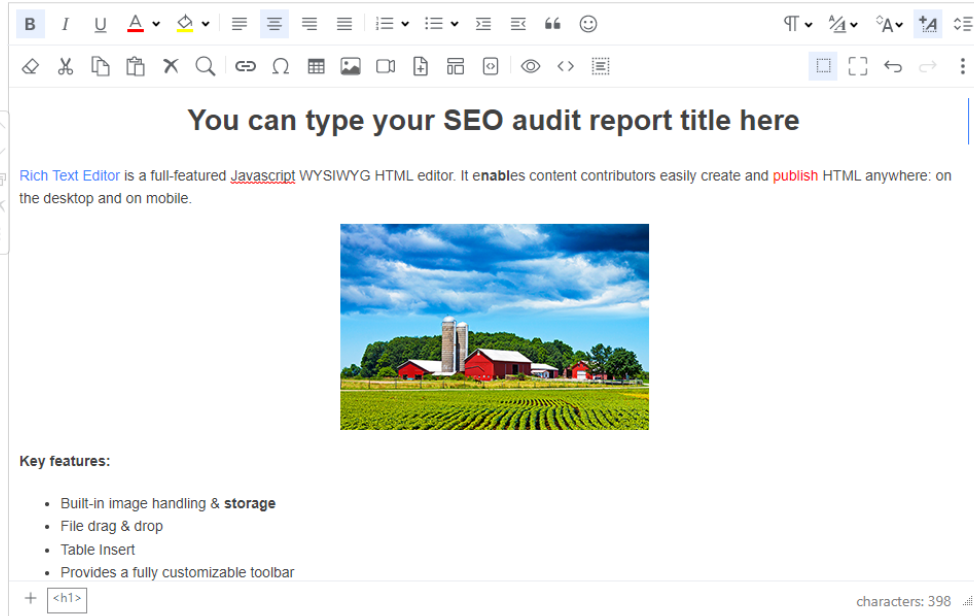If you would like to change your login password, you need to do this via this page.

7. License Key Setting

Fields	Description
License Key	It is a unique 16-digit license key of a plan.
Your email	Your email address in our record that we use to communicate with you. If you have more than one plan, all plans will refer to the same email address.
Plan	It indicates the plan that is associated with the above-mentioned license key.
For public?	It must be set as "Yes" for public to use your tool. If you do not want your website visitors to use your tool for any reason, you can set it as "No" and the audit tool will show an error message in red: "This license key: XXXXXXXXXXXXXXXX is not for public to use." if someone tries to use it.
License Key Creation Date	The date this license key was created.
1-Month Unlimited Audits Guarantee Expiry Date	If the plan is entitled for 1-Month Unlimited Audits Guarantee, an expiry date of this guarantee is shown here.
License Status	It is "active" by default. If a plan does not show an "active" status, the license key may be temporarily disabled.
Credit Left	This field shows how many audits can be used for this license key. A notification will be sent to the licensee if there is 10 credits left. If the credit is used up (i.e. zero credit balance), an error message: "Credits have been used up." will be shown if someone tries to use the audit tool unless the plan is covered by 1-Month Unlimited Audits Guarantee
Email address for lead notification or shown to your visitors	For Pro plan, if the "Notify You?" field below is Yes, this email address will be used by the system to send notification when some has perform an audit on the website. If this field is blank, the default contact email (i.e. the login email) will be used to send notification.

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	For other plans, this is the email address you would like to display on your SEO audit report. This email address can be different to your contact email as shown in "Your email" field above.
Form Title~	The title of the SEO Audit tool embedded on your website. It is visible to your website visitors.
Form description~	The description of the SEO Audit tool embedded on your website. It is visible to your website visitors.
Form Button Text~	The button text you would like your tool to display.
Report Title~	The title of the SEO audit report after your website visitors submit a SEO audit request. It is shown on the top of the report.
Report Introduction~	An introduction of the SEO audit report after your website visitors submit a SEO audit request. This will be shown above the result in the report.
Report Summary~	A summary of the SEO audit report after your website visitors submit a SEO audit request. This will be shown below the result in the report.
Notify you?~	**Yes**: An email notification will be sent to your contact email as shown in "Your email" field above every time after a visitor submit an audit request. It is good if you want to take a speedy action. **No**: Our system will not send you an email notification after a visitor submit an audit request.
Form Options~	You can choose what information (Email, Name, Phone) you require your visitors to provide in order to use your SEO audit tool.
Mailchimp API~	If you need to use Mailchimp to handle the response after your website visitors generate a SEO audit report, you need to provide Mailchimp APIkey here. Leave this field blank if you do not use Mailchimp. How to find or generate Mailchimp APIkey? Please refer to this link: https://mailchimp.com/en-au/help/about-api-keys/
Mailchimp Audience ID~	If you need to use Mailchimp to handle the response after your website visitors generate a SEO audit report, you need to provide Mailchimp Audience ID here. Leave this field blank if you do not use Mailchimp. How to find your Mailchimp Audience ID? Please refer to this link: https://mailchimp.com/en-au/help/find-audience-id/

~ Only applicable to Pro plan.

Our form accepts html code. If you would like to format the text shown in the report, you can use html code. For example, if you would like to type the text as header, you can <H1> html tag; if you would like to bold a text, you can use <b> html tag.

Alternatively, if you are not familiar with html code, you are suggested to use some online rich-text editor (such as https://richtexteditor.com/ and it is free) so that you do not have to do the coding by yourself. Steps as follows:
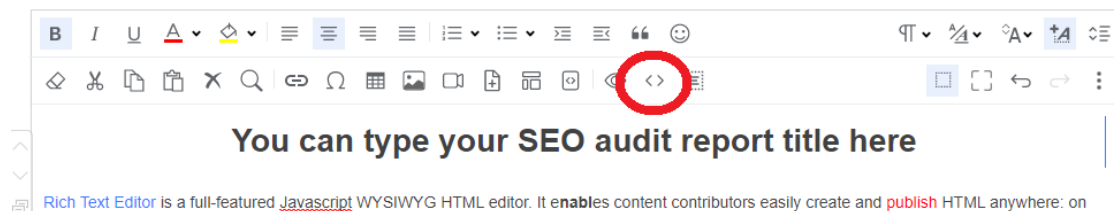
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Step 1: go to the website mentioned above to use the rich-text editor tool and you will find the editor as shown in Picture 7.1. You can then create your content for your SEO report that is shown to your visitors.
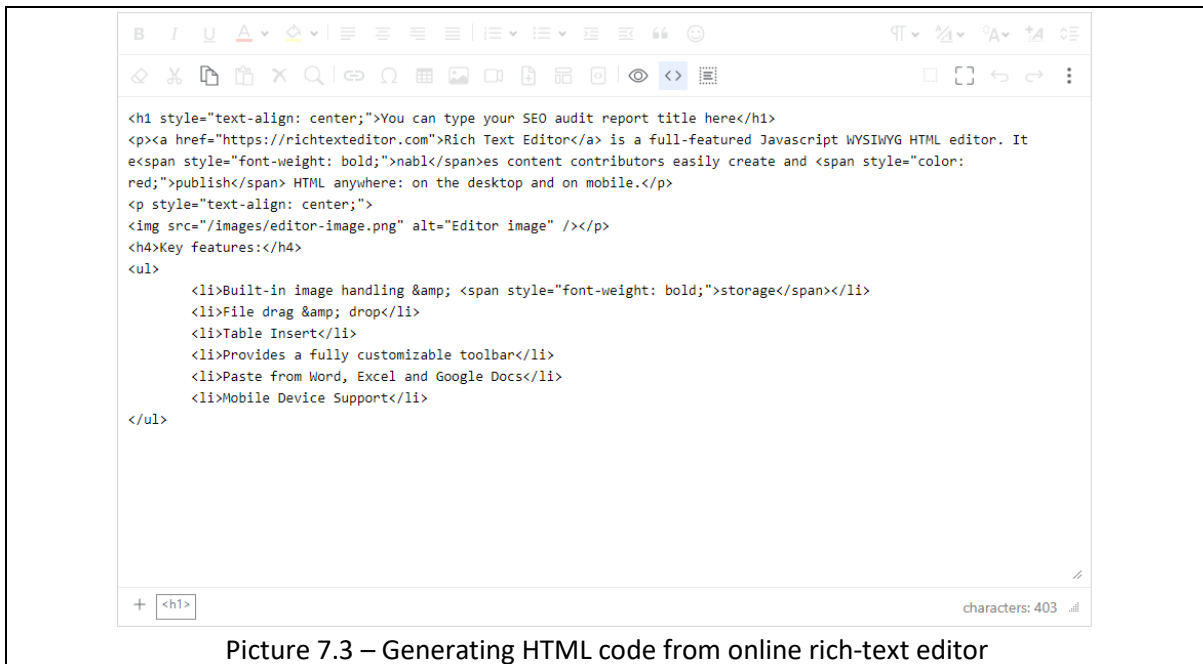

Picture 7.1 – online rich-text editor sample

Step 2: Once you have finished creating your content, click the HTML code button as shown in Picture 7.2 below.

Step 3: You will find html code that you can use in your License Key setting. Example shown in picture 7.3 below

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Picture 7.3 – Generating HTML code from online rich-text editor

8. Upgrade

For a Free plan, users can upgrade it to Basic/Growth/Pro plan.

For a Basic plan, users can upgrade it to Growth/Pro plan.

For a Growth plan, users can upgrade it to a Pro plan only.

For a Pro plan, users cannot upgrade.

Once a user has clicked the "UPGRADE" button, the user will be redirected to a checkout page. After a successful payment, the user will be brought back to Dashboard home where they can see the new plan on the "Plan Name" column. The new credit balance will be the sum of the remaining credit balance of your previous plan and the additional credit of the new plan. For example, if you have a basic plan with remaining credit balance of 17 credits before the upgrade and you upgrade it to a Pro plan, the new credit balance will be 2,017 credits (i.e. 17 + 2,000 credits).

9. Recharge

Once a user clicks on Recharge button, the user will be redirected to a checkout page. After a successful payment, they will be brought back to Dashboard home. The top up amount corresponds to the plan of the license key being recharged.

- For Basic plan, the top up amount is 100 audits for each recharge.
- For Growth plan, the top up amount is 300 audits for each recharge.
- For Pro plan, the top up amount is 2,000 audits for each recharge.

10. Usage

Column	Description
Index	This is the unique identifier of each audit
URL	The URL of a landing page that a visitor enter for audit
Keyword	The keyword used by a visitor to see how optimized for the above URL
Date of Enquiry	The date that an audit is performed

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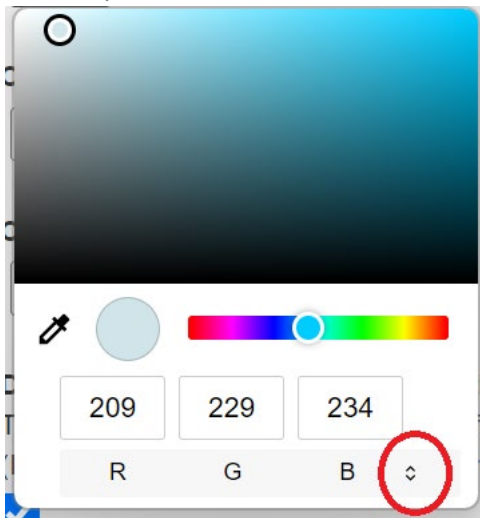| Email	For Pro plan only. Email address of the visitor who performed the audit
Name	For Pro plan only. Name of the visitor who performed the audit
Phone	For Pro plan only. Phone number of the visitor who performed the audit
IP Address	IP address of the visitor who performed the audit

10.1 Download CSV file

Users can see an icon [CSV] for them to download a CSV file for their own records. It is highly recommended for users to download CSV file on a regular basis and keep the file in a safe place.

11.   Embed-Code

On this page, users can slightly customise the form such as changing background colour/text colour or choosing not to show default form description, etc. The options are pretty straight forward and thus this document is not going to explain everything in detail. Basically, users just need to click on "Generate embed code" to have the code generated that is for users to copy it and paste it on the website.

11.1 How to choose colour?

Once the user clicks on the colour box, the user can choose any colour. If the user would like to enter the own colour code such as HEX code, the user can click on the small button as shown in small red circle in picture 11.1 which will be shown in HEX format as shown in picture 11.2 below.

Picture 11.1

Picture 11.2

11.2   What if the audit form does not display correctly?

As shown in Picture 11.3, the form has been embedded on the website, but cannot display correctly because it is "bigger than the frame". In this case, user can make a small change to the embed code to make the "frame" bigger. Approximately in line 5 of the embed code, users can find the percentage of "padding-top", change the number bigger will solve the issue. See picture 11.5.

After users to copy an embed code and paste the code on their websites, the audit for should be displayed on the website.

Picture 11.3 – the embedded form cannot display in full.

```
<!-- SEOembedder embed code start -->
<div class="container" style="position: relative;
  width: 100%;
  overflow: hidden;
  padding-top: 45%;"> |
  <iframe class="responsive-iframe"
src="https://www.seoembedder.com/portal/form-pro.php?key=demo1234
&bgcolour=d1e5ea&btncolour=008b47&ctacolour=ffffff&formtitle=1&formtext=1
&formborder=1&formsize=2" style="position: absolute;
  top: 0;
  left: 0;
  bottom: 0;
  right: 0;
  width: 100%;
  height: 100%;
  border: none; "></iframe>
</div>
<!-- SEOembedder embed code end -->
```

Change this number

Picture 11.4 – how to change the embed code to adjust the frame.

Picture 11.5 – solve the issue after changing the "padding-top" percentage

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11.3 How to design your own SEO audit form?

If a user does not like the design of our form, the user can design their own style of forms. Users just need to use the below variables and values via POST method if they wish to use their own design of form to generate audit reports for their visitors.

1) form action = https://www.seoembedder.com/portal/tool.php?key=(put your license key here)&ispopup=1

2) form name="auditform" (you can change it accordingly together with point 8 below)

3) The URL input field uses the name "urlinput"

4) The keyword field uses the name "keywordinput"

5) The email field uses the name "emailinput"

6) The name field uses the name "nameinput"

7) The field for contact uses the name "phoneinput"

8) add this line inside your submit button input: onclick="auditform.target='POPUPW'; POPUPW = window.open('about:blank','POPUPW','width=600,height=400');"

Users can use our demo license key: demo1234 to test form if they do not want to use their credits for testing.

Please see picture 11.6 on how we customise the form on our demo page (https://www.seoembedder.com/free-seo-audit-tool/).

```html
<form action="https://www.seoembedder.com/portal/tool.php?key=demo1234&ispopup=1" method="post" name="auditform">
<fieldset>
<legend><span class="number">1</span> URL & Keyword</legend>
<input type="url" name="urlinput" placeholder="https://www.example.com *">
<input type="text" name="keywordinput" placeholder="keyword phrase *">
</fieldset>
<fieldset>
<legend><span class="number">2</span> Your Details</legend>
<input type="email" name="emailinput" placeholder="Your Email *">
<input type="text" name="nameinput" placeholder="Your name">
<input type="text" name="phoneinput" placeholder="Phone number">
</fieldset>
<input type="submit" value="Generate Instant Report" onclick="auditform.target='POPUPW'; POPUPW = window.open('about:blank','POPUPW','width=600,height=400');">
</form>
</div></p>    </div>
```

Picture 11.6 – Customized form html code example