Listing your company on the RTPI Directory of Planning Consultants

A step-by-step guide

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Introduction

The RTPI (Royal Town Planning Institute) Directory of Planning Consultants is an online directory of companies which employ at least one Chartered Member of the RTPI.

Companies can register to be listed on the Directory for a calendar year, signing up to one of four packages. The user search feature allows customers to find a consultant by using a name or location. The results of the search are displayed to the customer in a list which can be sorted and filtered, or on a map which shows the contact details and information of the companies found.

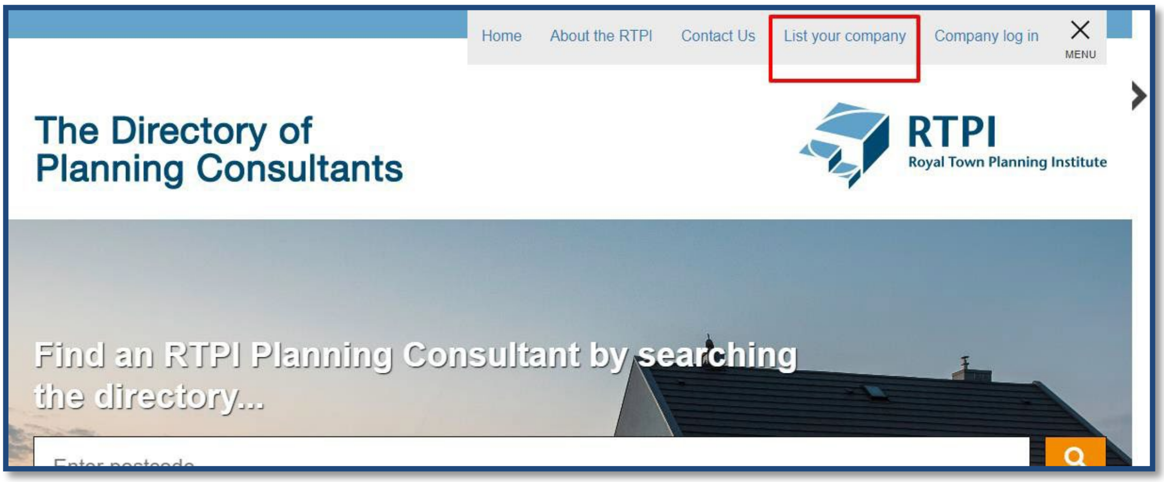
Listing your Company

To list your company on the RTPI Directory please visit the directory website at https://www.rtpiconsultants.co.uk/.

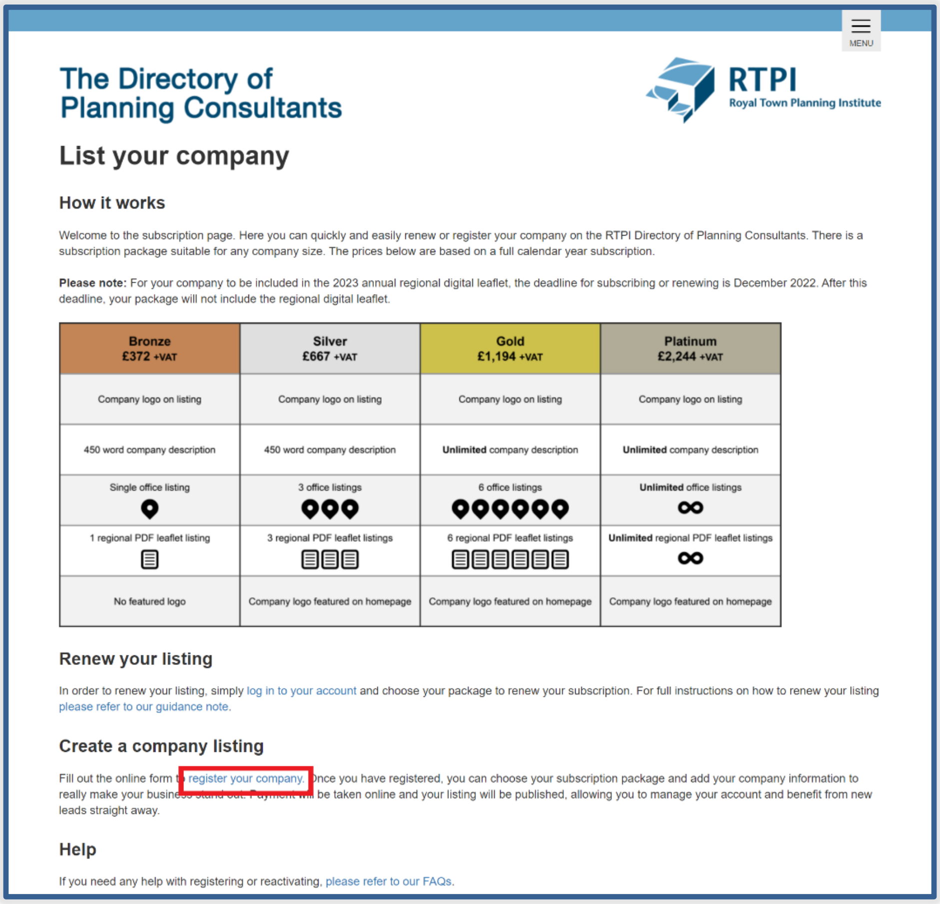
Create your listing

From the website home page please click the Menu icon in the top right corner of the screen.

From the Menu select **List your company**.



You will be presented with a page explaining how the Directory works, the different packages you can subscribe to, what they offer and how much they will cost. After reviewing this page, please click the **register your company** link.



The Directory of Planning Consultants

RTPI
Royal Town Planning Institute

MENU

List your company

How it works

Welcome to the subscription page. Here you can quickly and easily renew or register your company on the RTPI Directory of Planning Consultants. There is a subscription package suitable for any company size. The prices below are based on a full calendar year subscription.

Please note: For your company to be included in the 2023 annual regional digital leaflet, the deadline for subscribing or renewing is December 2022. After this deadline, your package will not include the regional digital leaflet.

Bronze £372 +VAT	Silver £667 +VAT	Gold £1,194 +VAT	Platinum £2,244 +VAT
Company logo on listing	Company logo on listing	Company logo on listing	Company logo on listing
450 word company description	450 word company description	**Unlimited** company description	**Unlimited** company description
Single office listing	3 office listings	6 office listings	**Unlimited** office listings
1 regional PDF leaflet listing	3 regional PDF leaflet listings	6 regional PDF leaflet listings	**Unlimited** regional PDF leaflet listings
No featured logo	Company logo featured on homepage	Company logo featured on homepage	Company logo featured on homepage

Renew your listing

In order to renew your listing, simply log in to your account and choose your package to renew your subscription. For full instructions on how to renew your listing please refer to our guidance note.

Create a company listing

Fill out the online form to register your company. Once you have registered, you can choose your subscription package and add your company information to really make your business stand out. Payment will be taken online and your listing will be published, allowing you to manage your account and benefit from new leads straight away.

Help

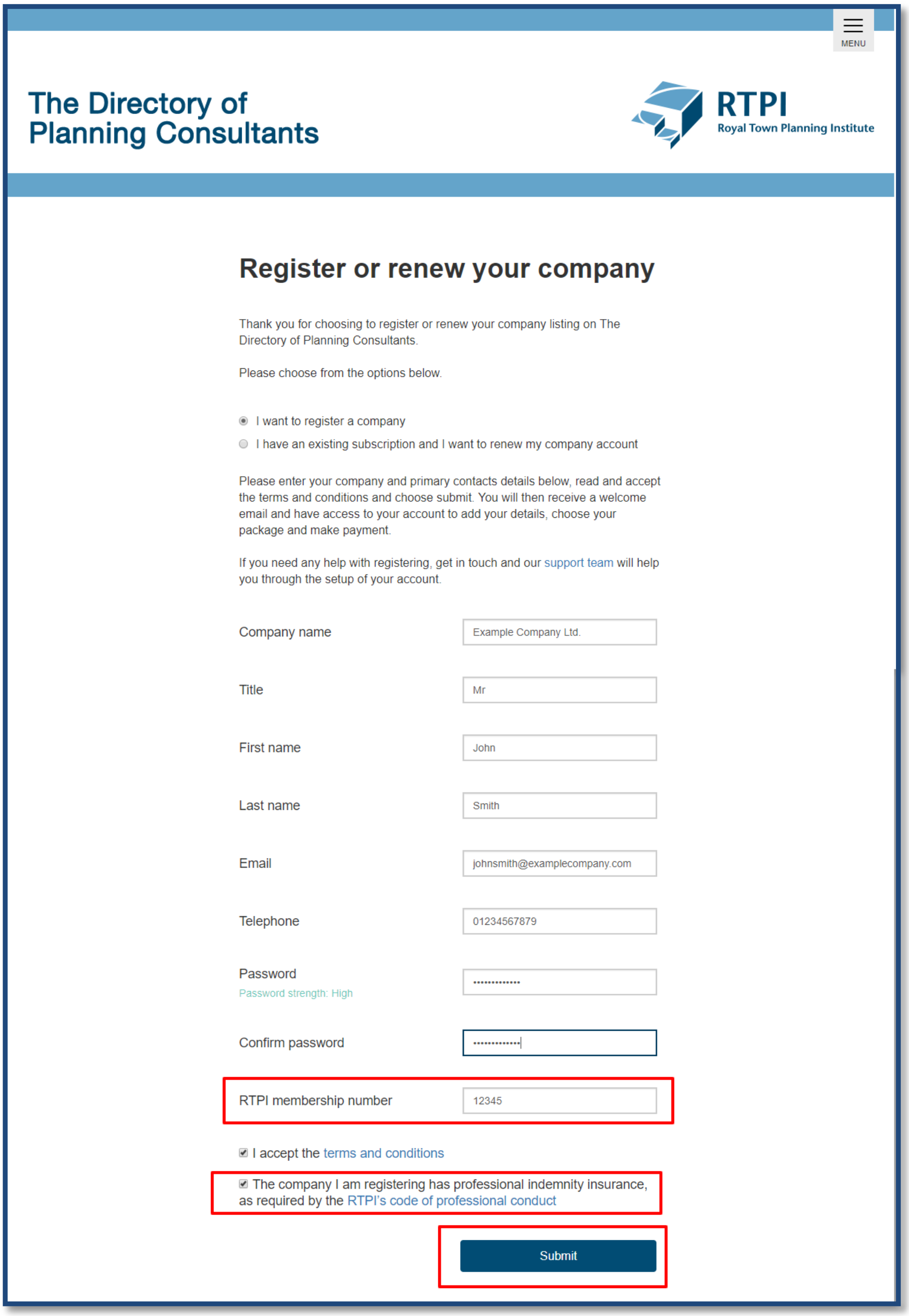
If you need any help with registering or reactivating, please refer to our FAQs.

On the **Register or renew your company** screen please complete the required information, ensuring you add your RTPI membership number and confirming that you have indemnity insurance.

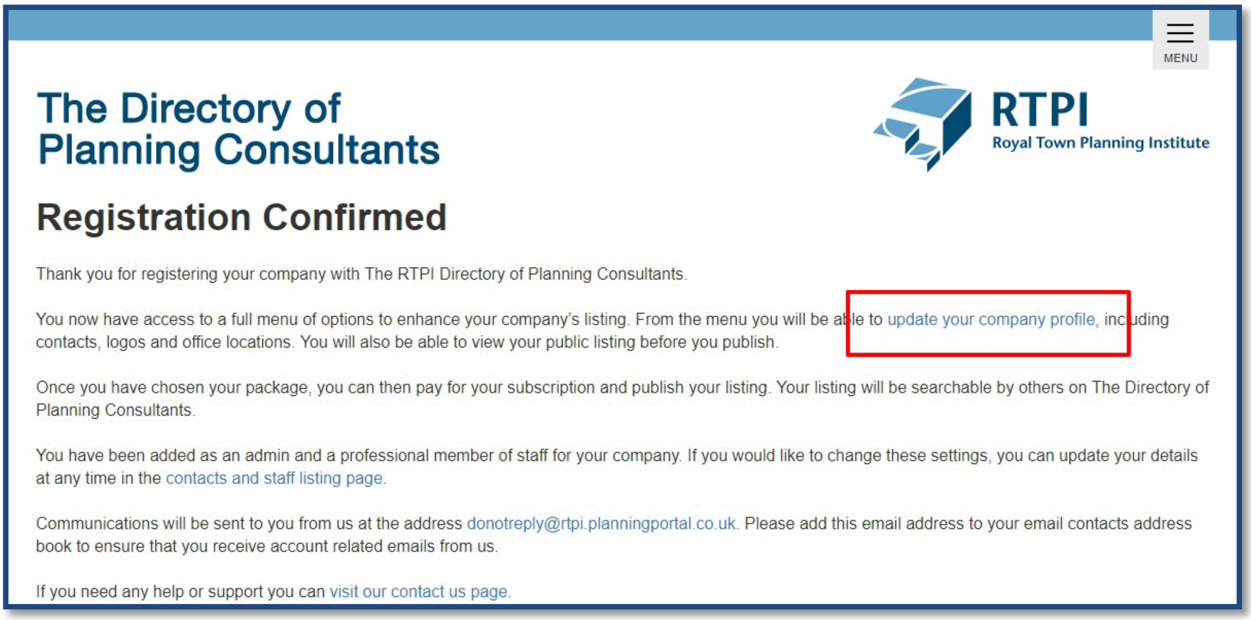
To register a new company you need to provide the following information:

- Company name
- First name
- Last name
- Email
- Telephone
- Password (this needs to be at least 8 characters long, with at least one uppercase letter, one lowercase letter and one number)
- Confirm your password (needs to match previously entered password)
- Add your RTPI Membership number (this needs to be 5 digits long)
- Tick terms and conditions
- Tick that you have professional indemnity insurance.

Once these details have been entered, please click **Submit** as shown below.



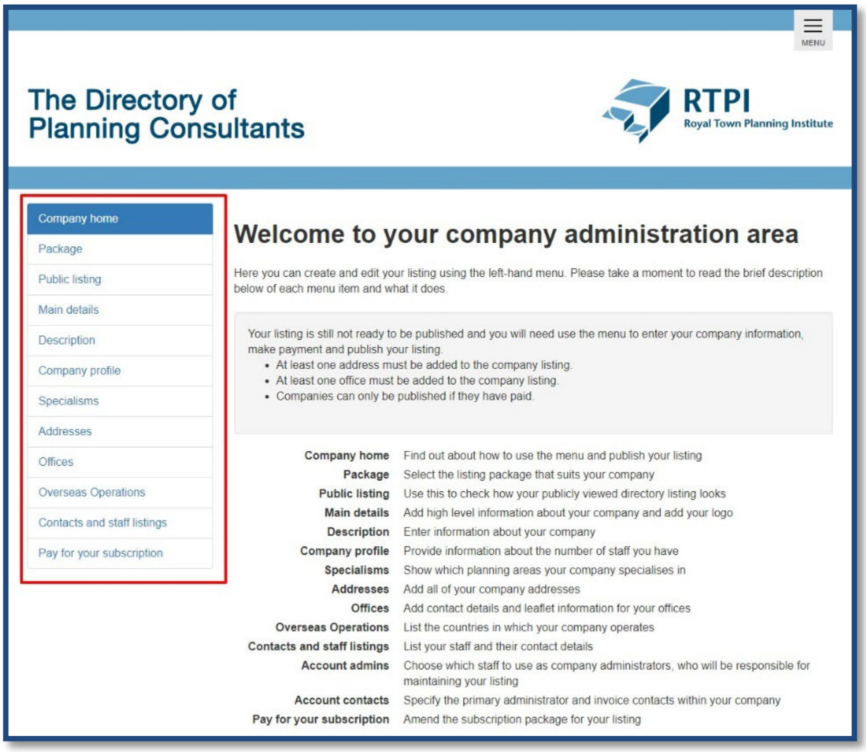
When the account is created, you will be logged into your account and see the following screen. Please **click update your company profile** to continue to create your listing.



Create your company profile

Company home

Your **Company Home** screen is where you can access and edit your company information. A menu on the left-hand side will allow you to navigate between the various elements of your listing. We suggest that the first time you create your profile you work through completing your profile from top-to-bottom, although once created you can edit any section in any order.



On this page you can access any of your company details using the menu links along the left-hand side.

There is a status box on this page which will show one of three types of status:

> Your listing has been published and can be searched by others.

This indicates that all the mandatory details have been completed, the company have paid, and the listing is LIVE on the directory.

> Your listing is still not ready to be published and you will need use the menu to enter your company information, make payment and publish your listing.
> - Companies can only be published if they have paid.

This indicates that there is still some mandatory action or information that needs to be addressed. In the above example payment has not been made but this status will also show if no *offices* or *staff* details have been supplied.

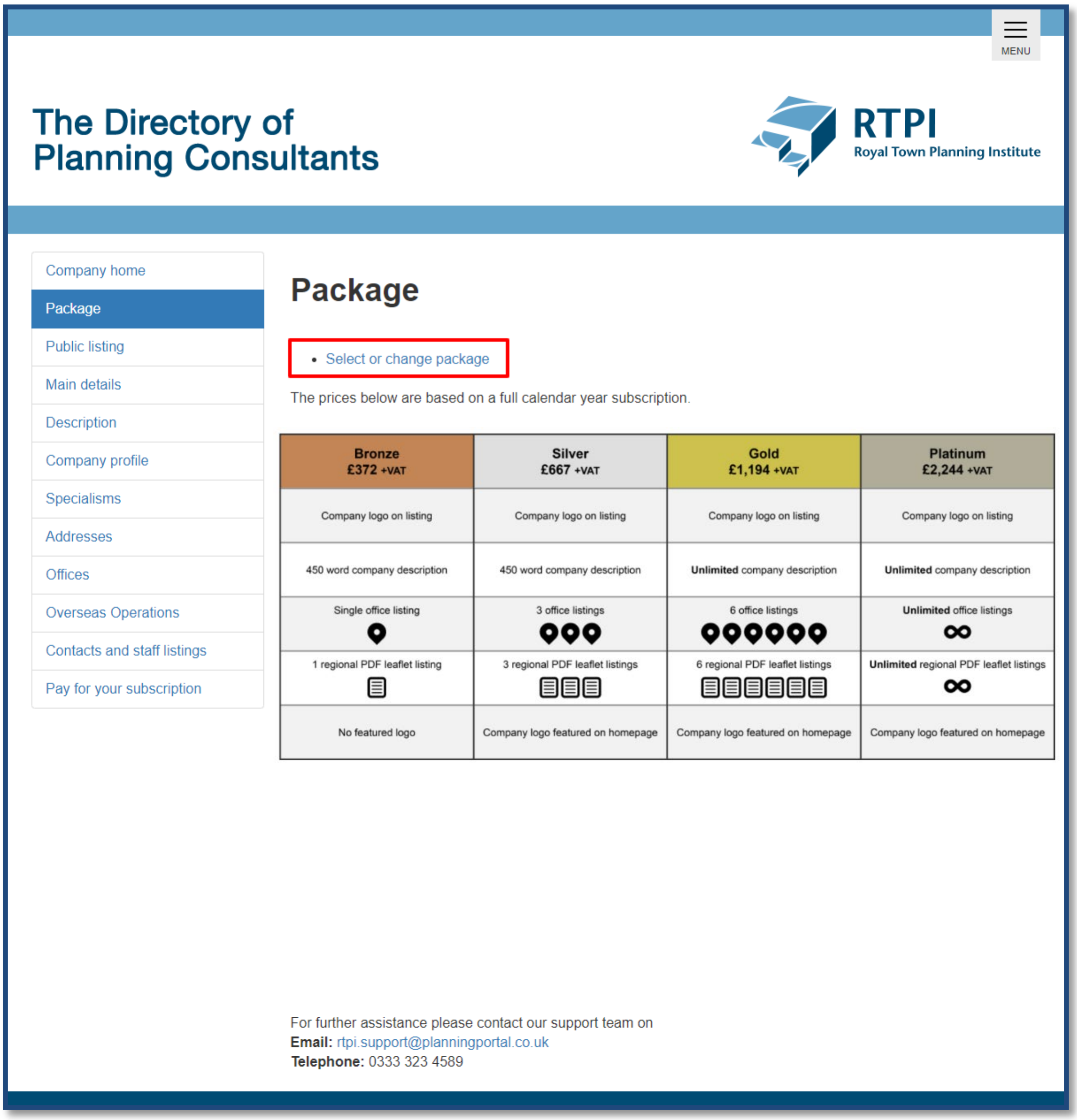
> Your organisation is ready to be published, please press the button below to make the entry available to the public.
> Publish

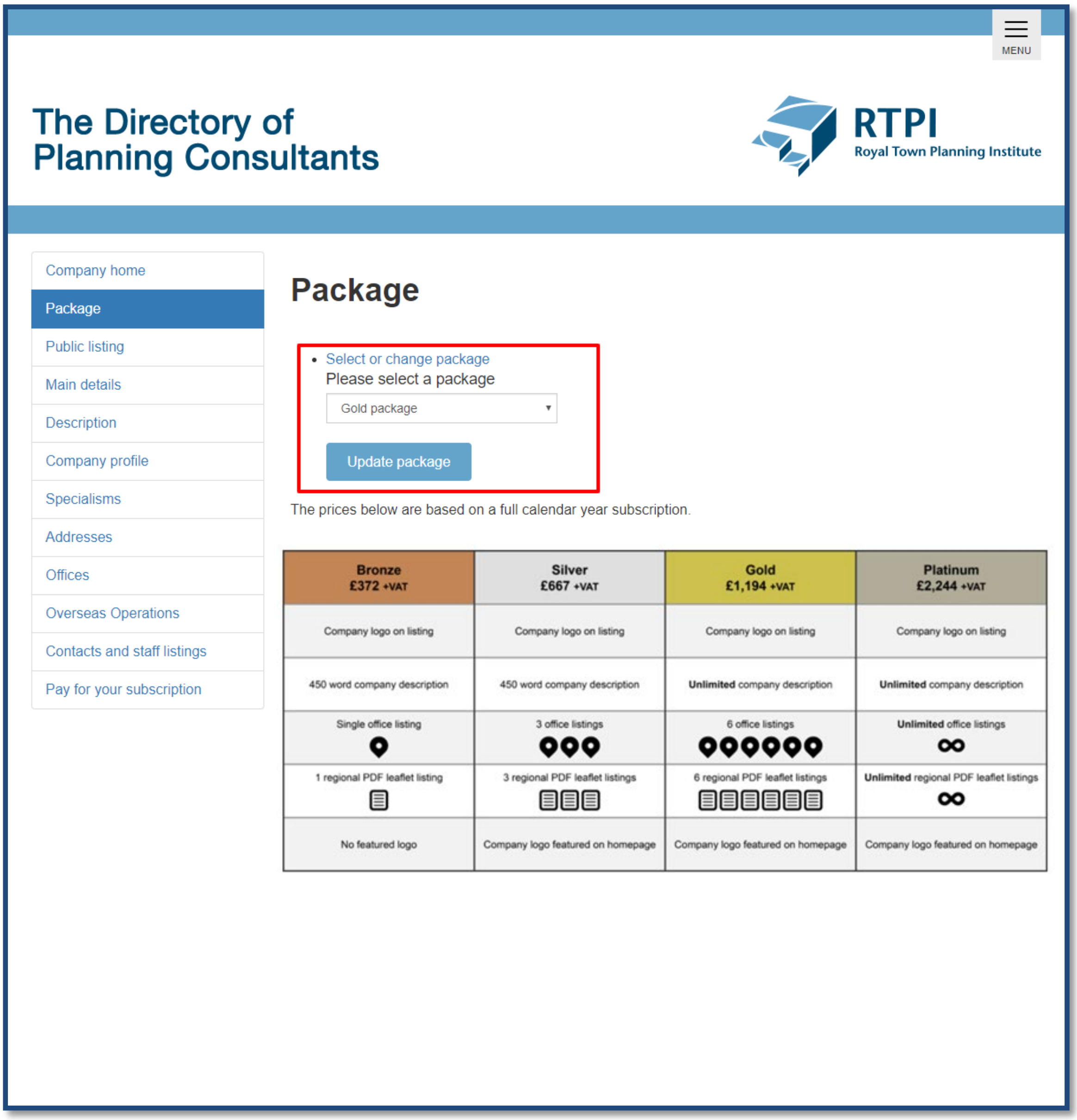
This indicates that everything has been supplied and that the administrator can publish the company listing by clicking the **Publish** button.

Package

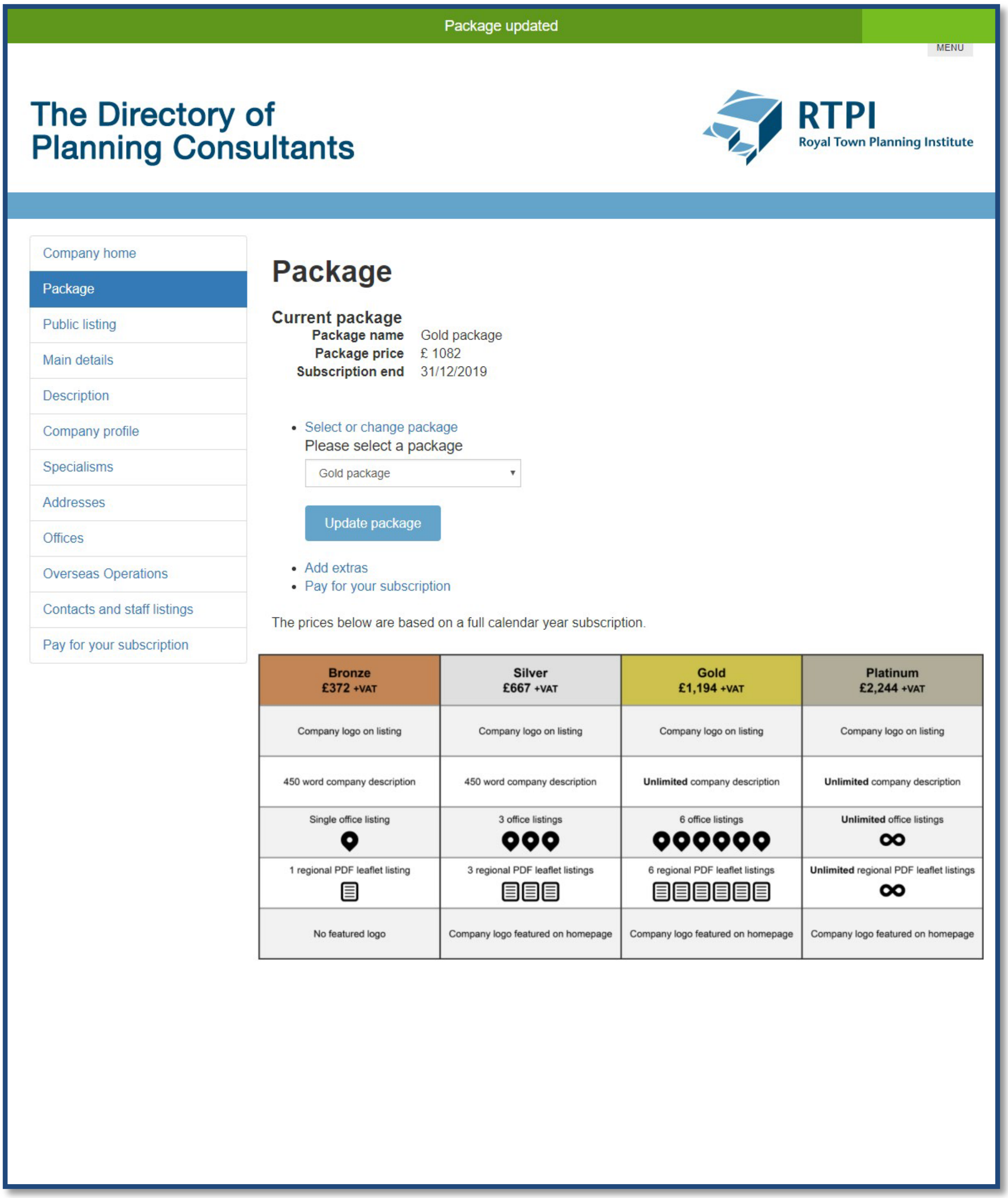
On this page the company administrator can select which package they wish their company to be on. The table featured on this screen shows the benefits of each of the four packages.

Clicking **Select or change your package** will allow you to choose a package from the drop-down menu. Once you have chosen, please click **Update package** to save your selection.





This will then show you which package you have selected.



Public listing

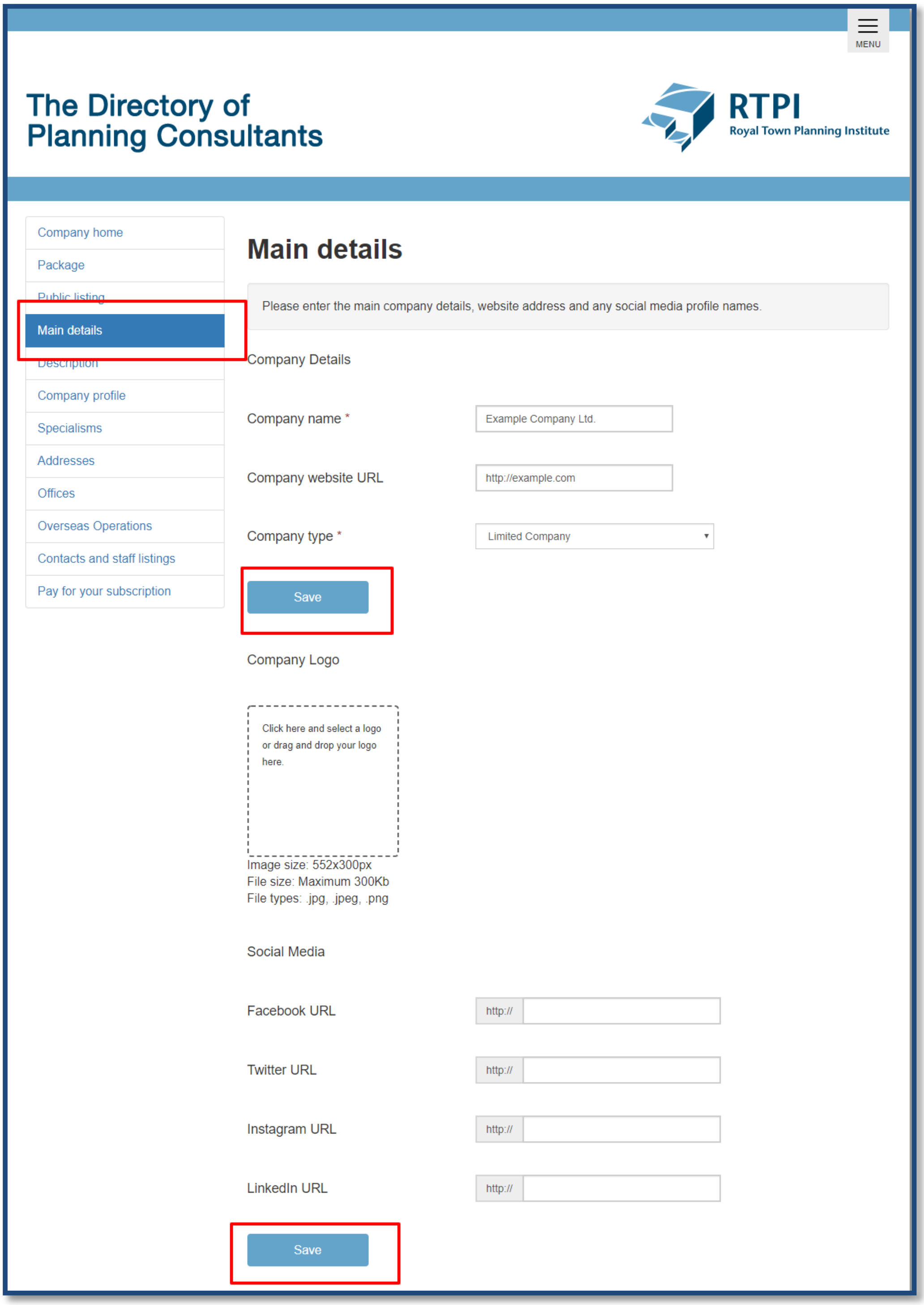
Clicking **Public listing** will open a new tab or window with your company's public facing page. This will display the public listing to the company administrator even before the company has been published to the public. This view can be used by the company administrator as a preview function before they publish their account, after which it will display exactly as the public will see it.

Main details

The **Main Details** page is where you can fill in the company's basic information. Mandatory fields are marked with an asterix.

The **Save** button at the top of the page needs to be clicked once the first three fields have been completed. The bottom **Save** button needs to be clicked when the logo and social media links have been completed.

The company logo can be uploaded by either dragging and dropping a file or by clicking within the box to open the find file dialog box.



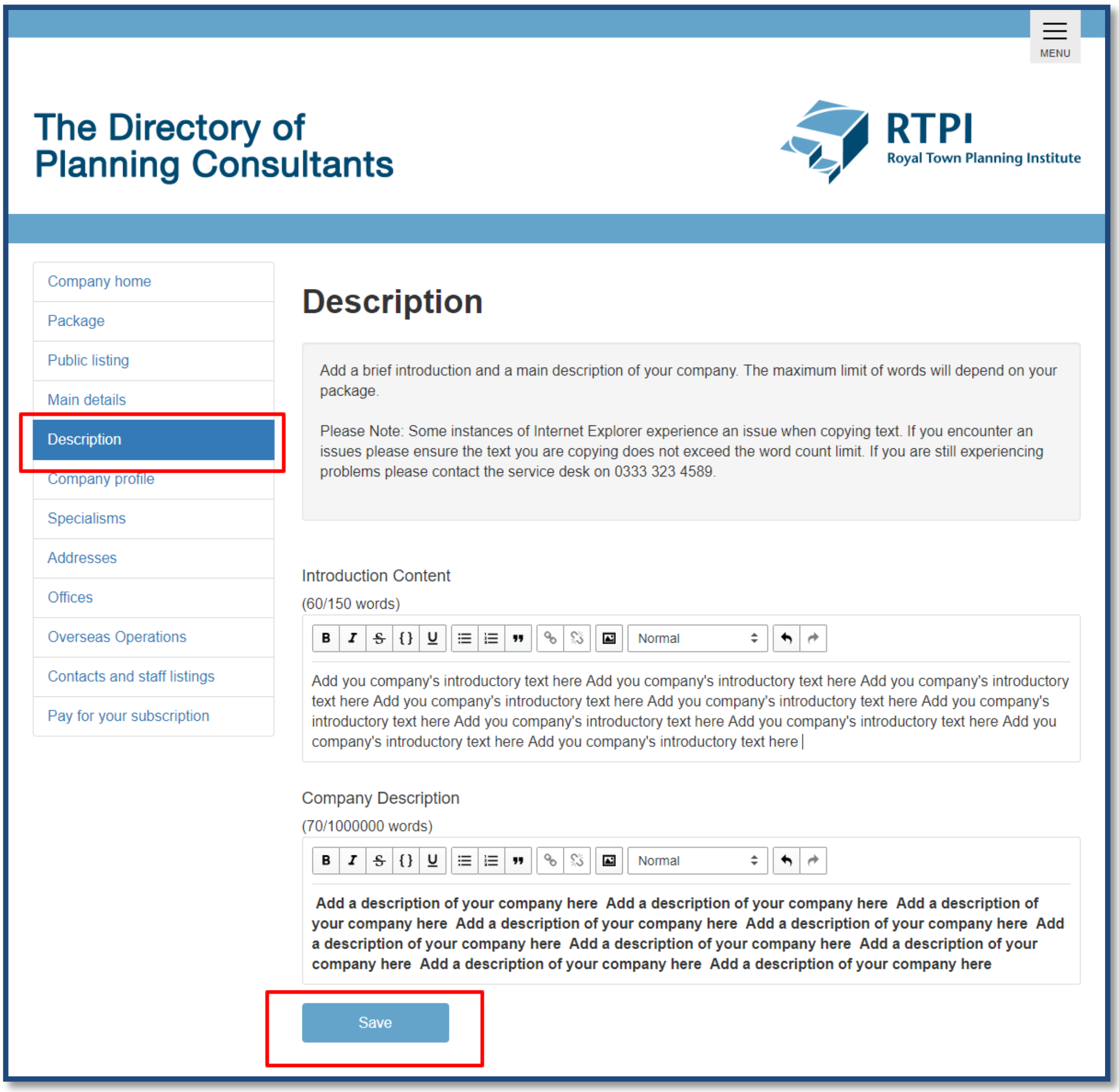
PlanningPortal

Description

In the **Description** section you can enter text for the introduction. This feature is in development and will be is surfaced in the search results, so ensure you check the search result and Company Description (featured in the company's public listing).

You have the ability to add or edit your description and a text editor is available to help with the formatting of the text you include, as displayed in the screen below.

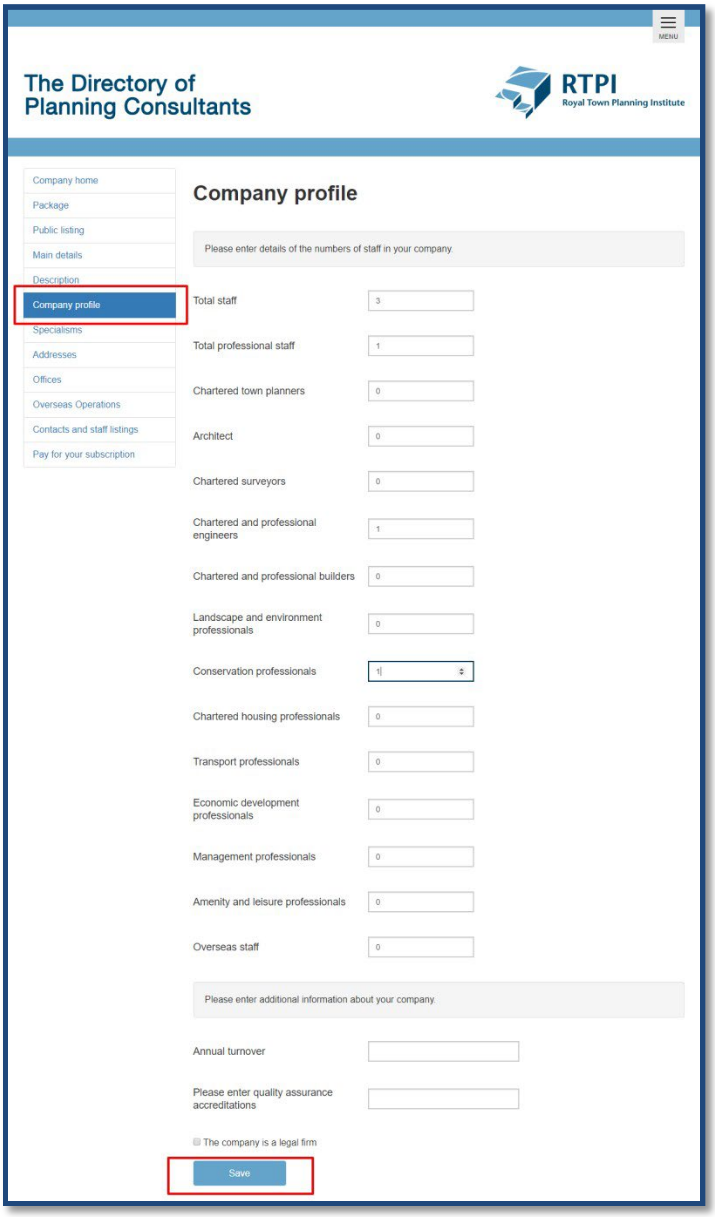
Save must be clicked to retain information.



Company profile

On the **Company Profile** screen you can list your staff details, annual turnover, enter the quality assurance accreditations and select whether the company is a legal firm. These are optional details.

Save must be clicked to retain information.

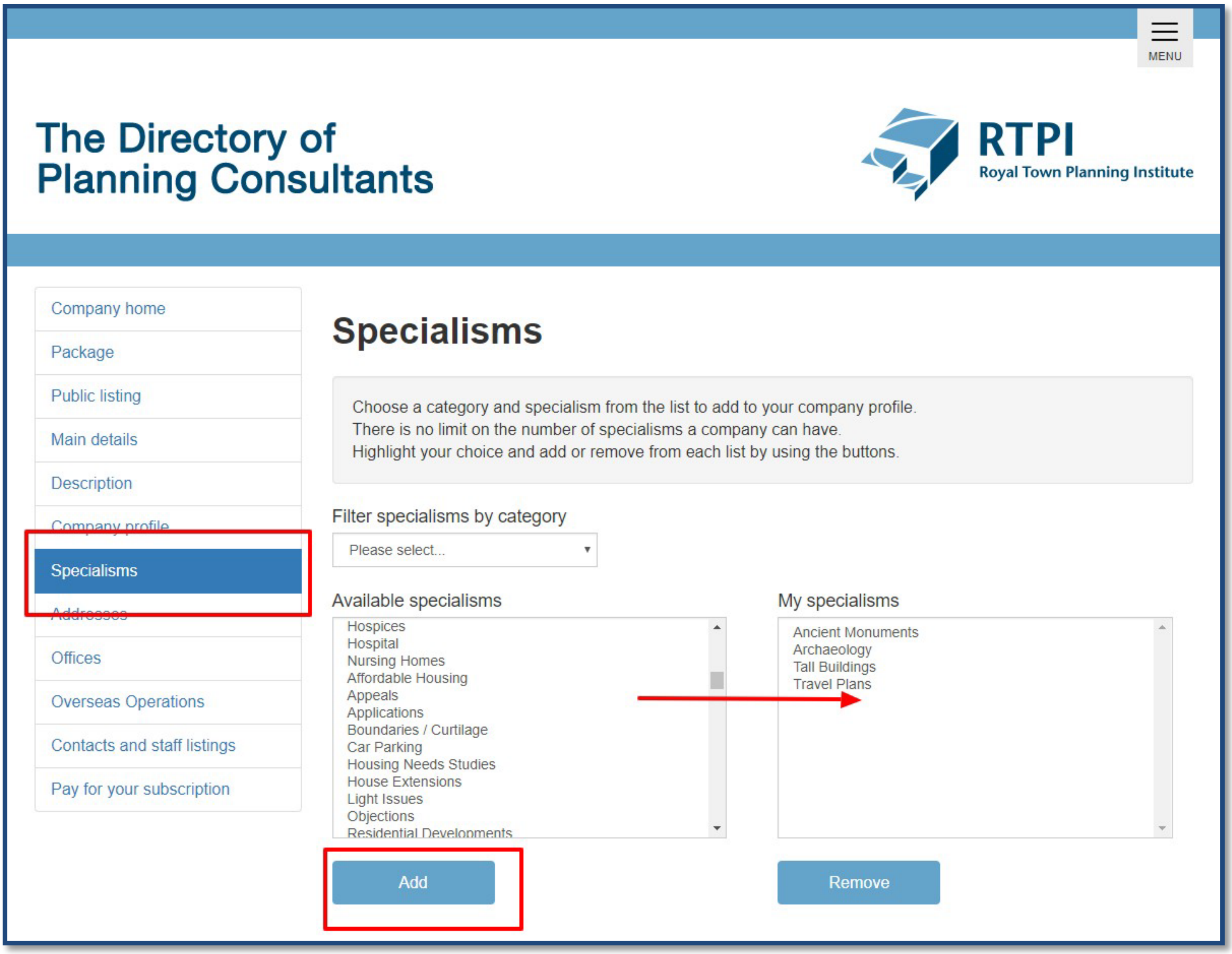


Specialisms

On the **Specialisms** screen you can add or remove specialisms from your public listing.

On the left is a list of all avaialble specialisms and on the right is a list of the specialisms the admin has selected. Highligting a specialism from the left hand list and clicking **Add** will add that to the company's list. Highlighting a specialism in the company's list and clicking **Remove** will delete it from their public facing list.

You can filter the available specialisms by category using the drop down list above the available specialisms.

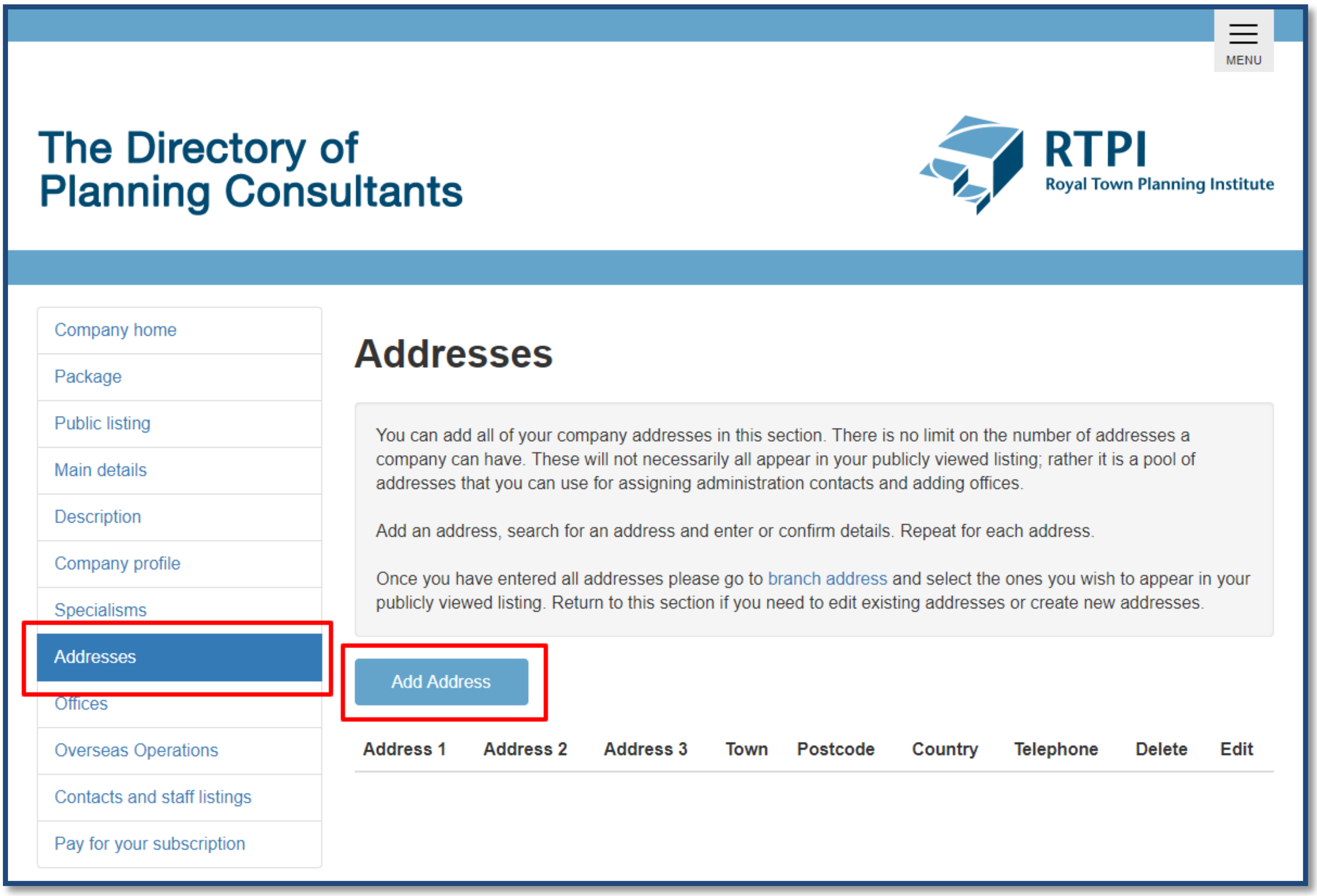


Addresses

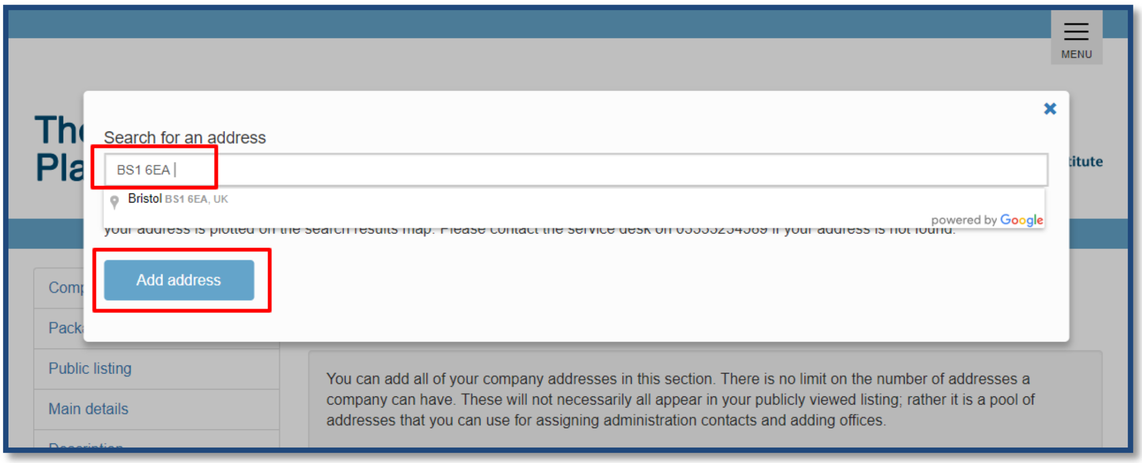
In this section you can add to your ‘pool’ or group of addresses (like an address book). These addresses are not public facing but can be used to manage staff profiles and offices.

Use **Delete** or **Edit** in the address table to remove or edit an address (although you cannot remove them all, there must be at least one).

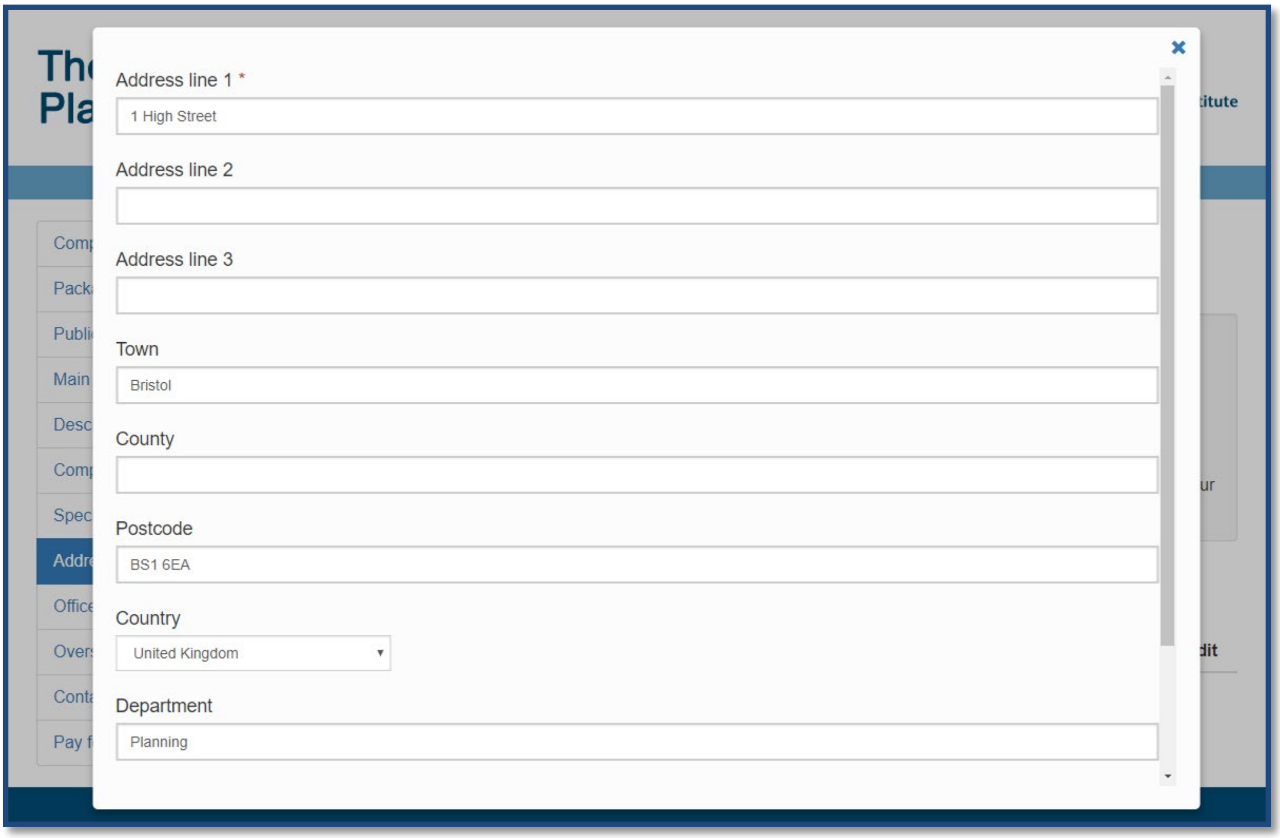
Addresses are added using the **Add Address** button which will open the pop-up editor.

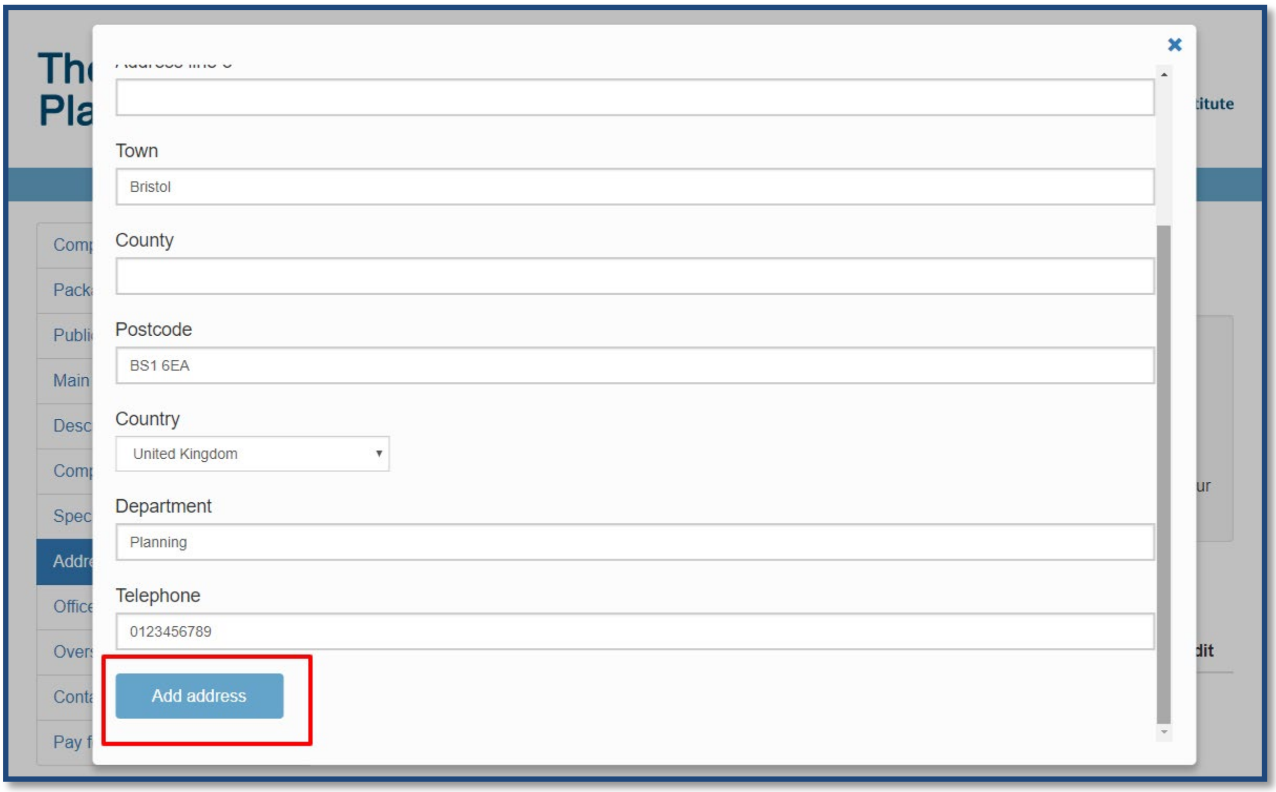


When adding an address please initially search for the location and click **Add address**.

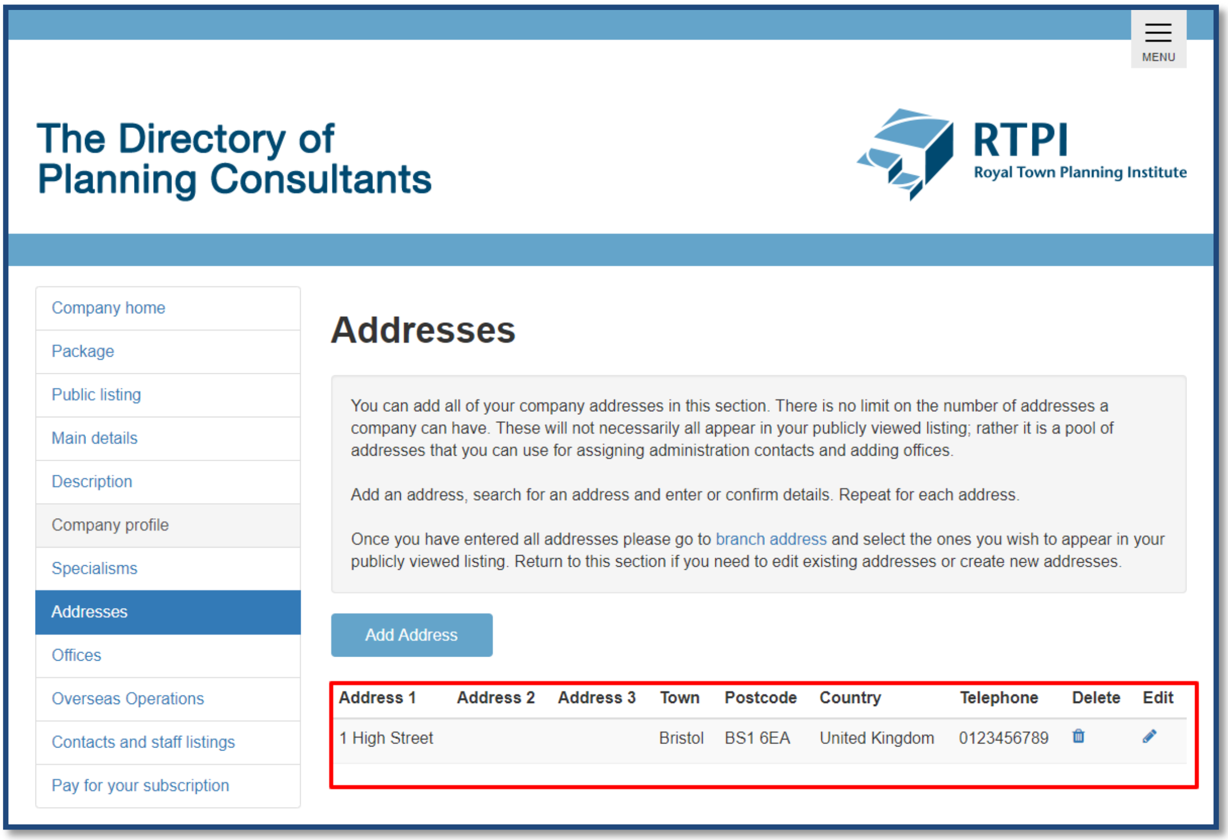


Once selected fill in the relevant details for the address and click **Add address**.





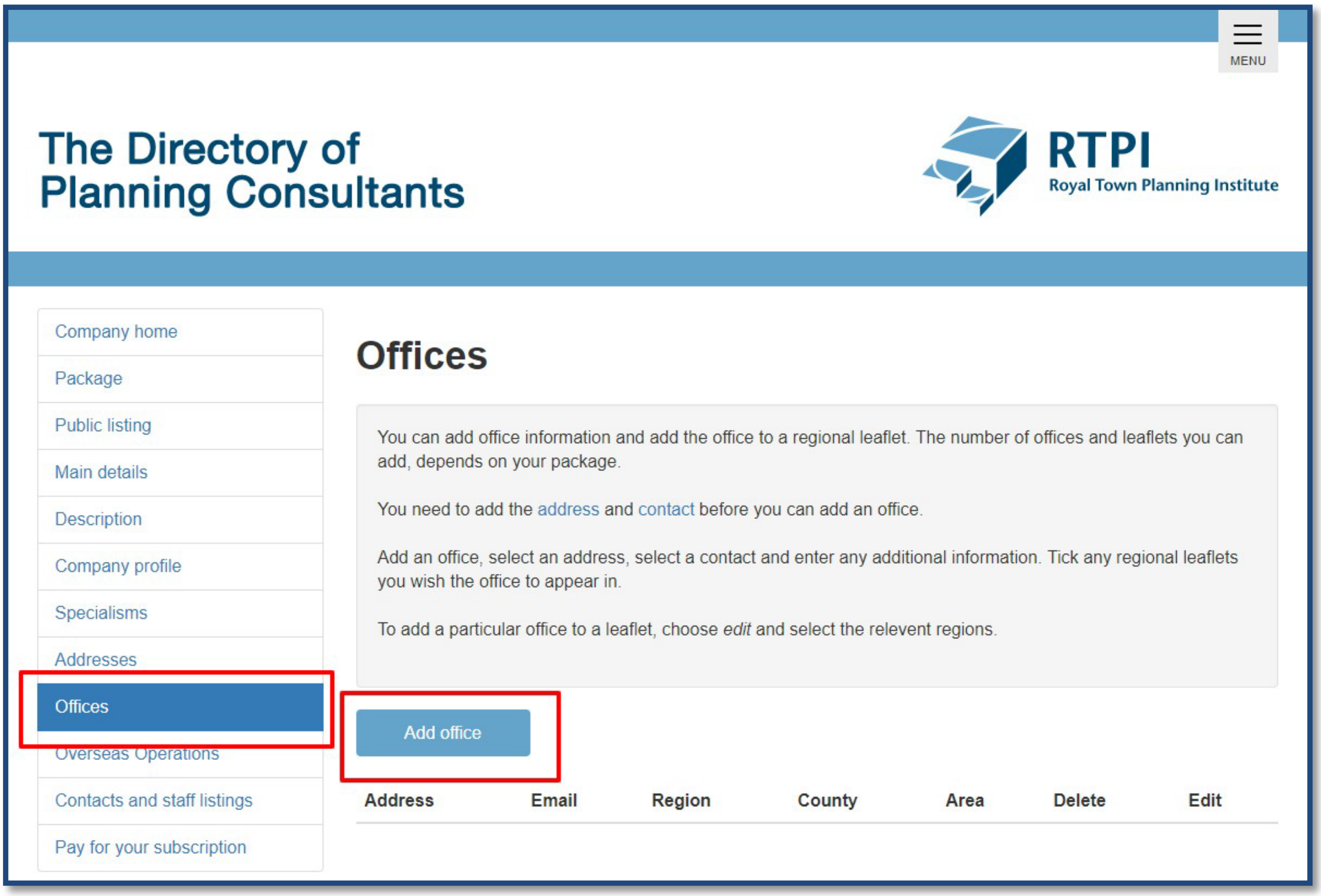
This will add the address to your address pool.



Offices

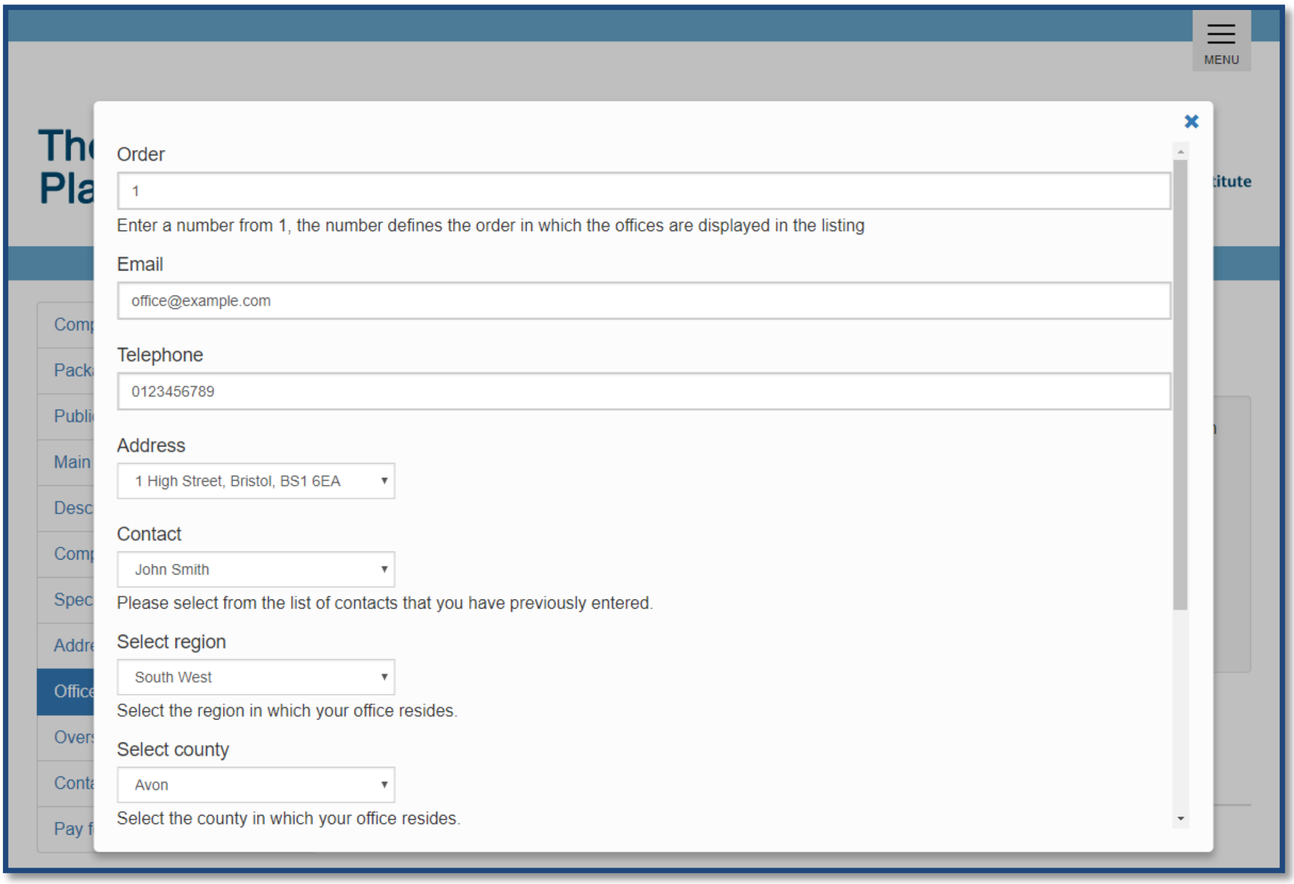
On this screen you can add, remove or edit the office that is listed on your public profile. You can choose from the locations added in the **Addresses** section to be shown as offices to the public.

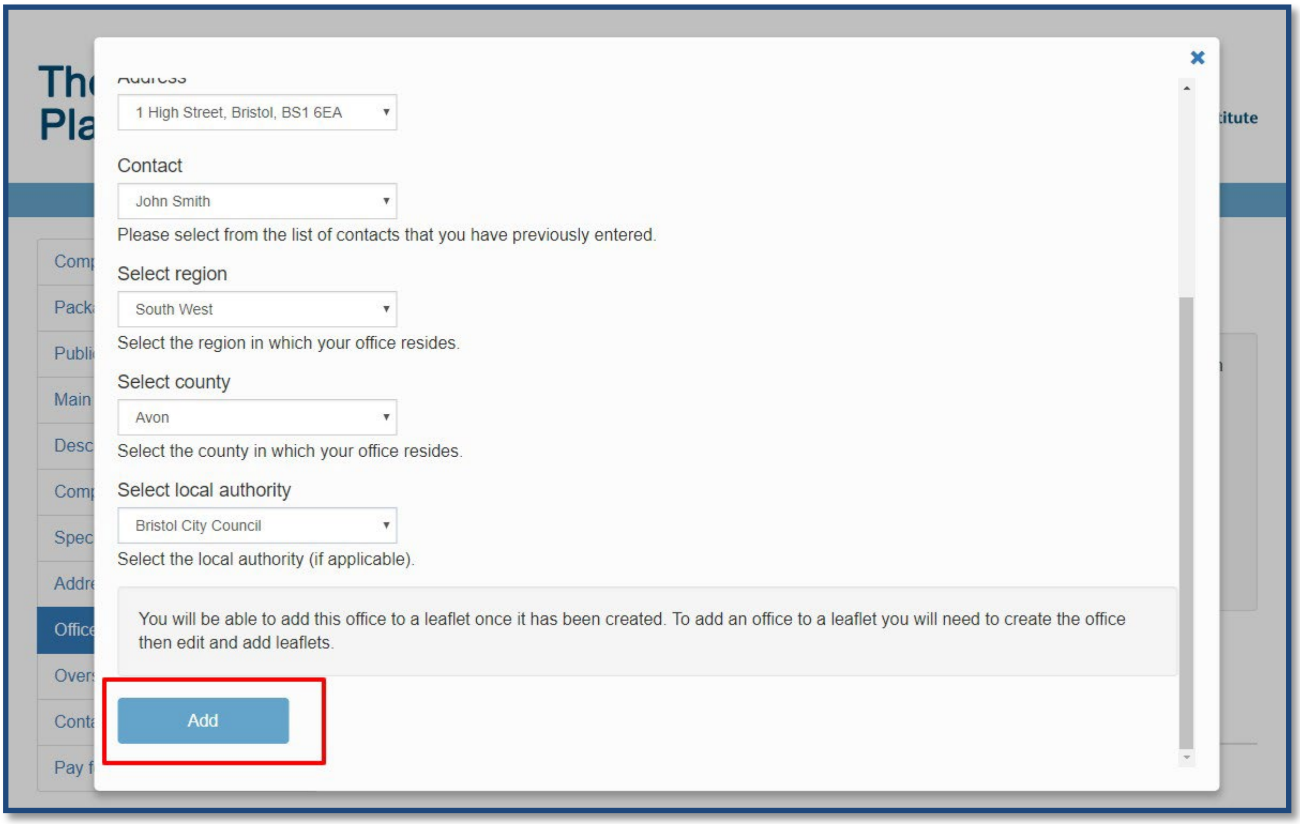
Offices are added using the **Add office** button which will open the pop-up editor.



The address (added in the address pool) can be selected from the address drop down list.

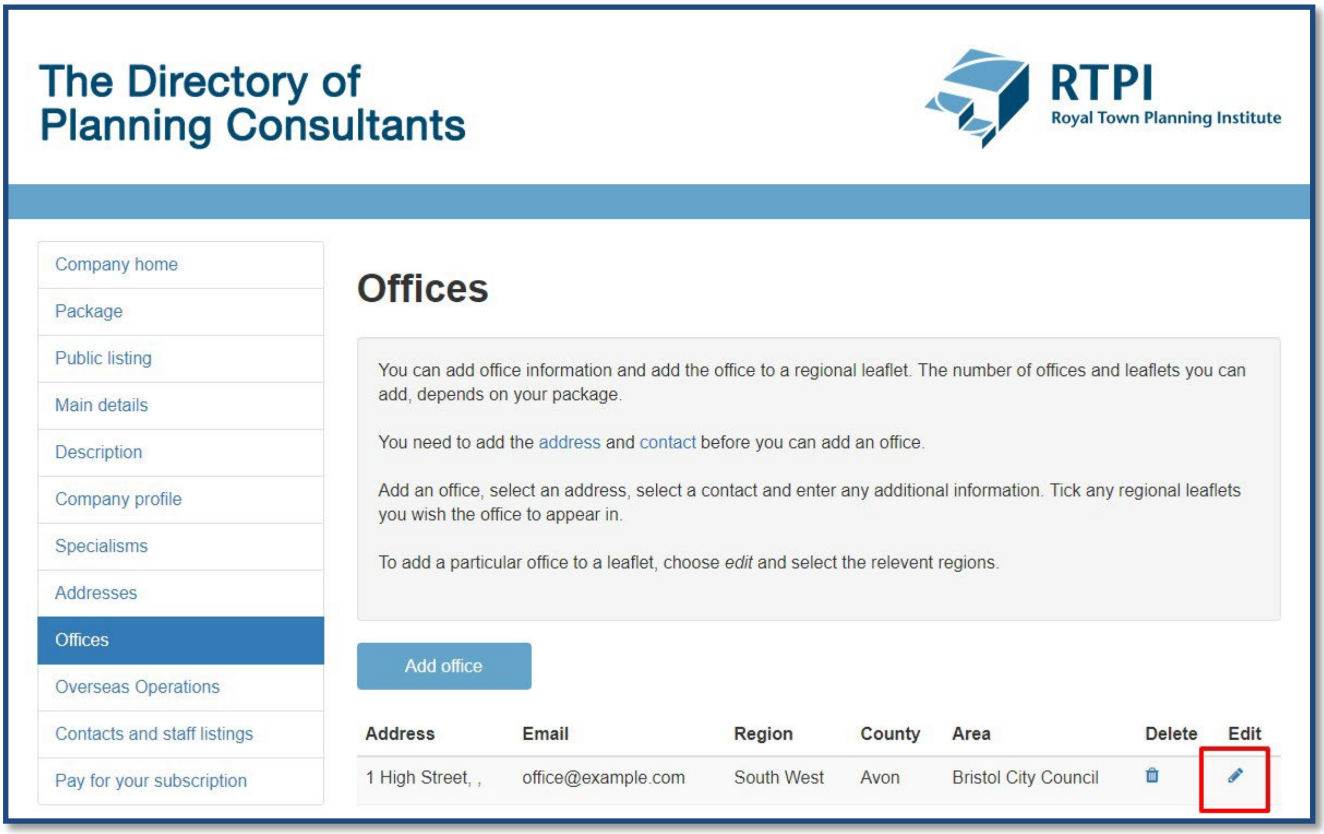
Add must be clicked to retain information.


MENU
Order
1
Enter a number from 1, the number defines the order in which the offices are displayed in the listing
Email
office@example.com
Telephone
0123456789
Address
1 High Street, Bristol, BS1 6EA
Contact
John Smith
Please select from the list of contacts that you have previously entered.
Select region
South West
Select the region in which your office resides.
Select county
Avon
Select the county in which your office resides.


1 High Street, Bristol, BS1 6EA
Contact
John Smith
Please select from the list of contacts that you have previously entered.
Select region
South West
Select the region in which your office resides.
Select county
Avon
Select the county in which your office resides.
Select local authority
Bristol City Council
Select the local authority (if applicable).
You will be able to add this office to a leaflet once it has been created. To add an office to a leaflet you will need to create the office then edit and add leaflets.
Add

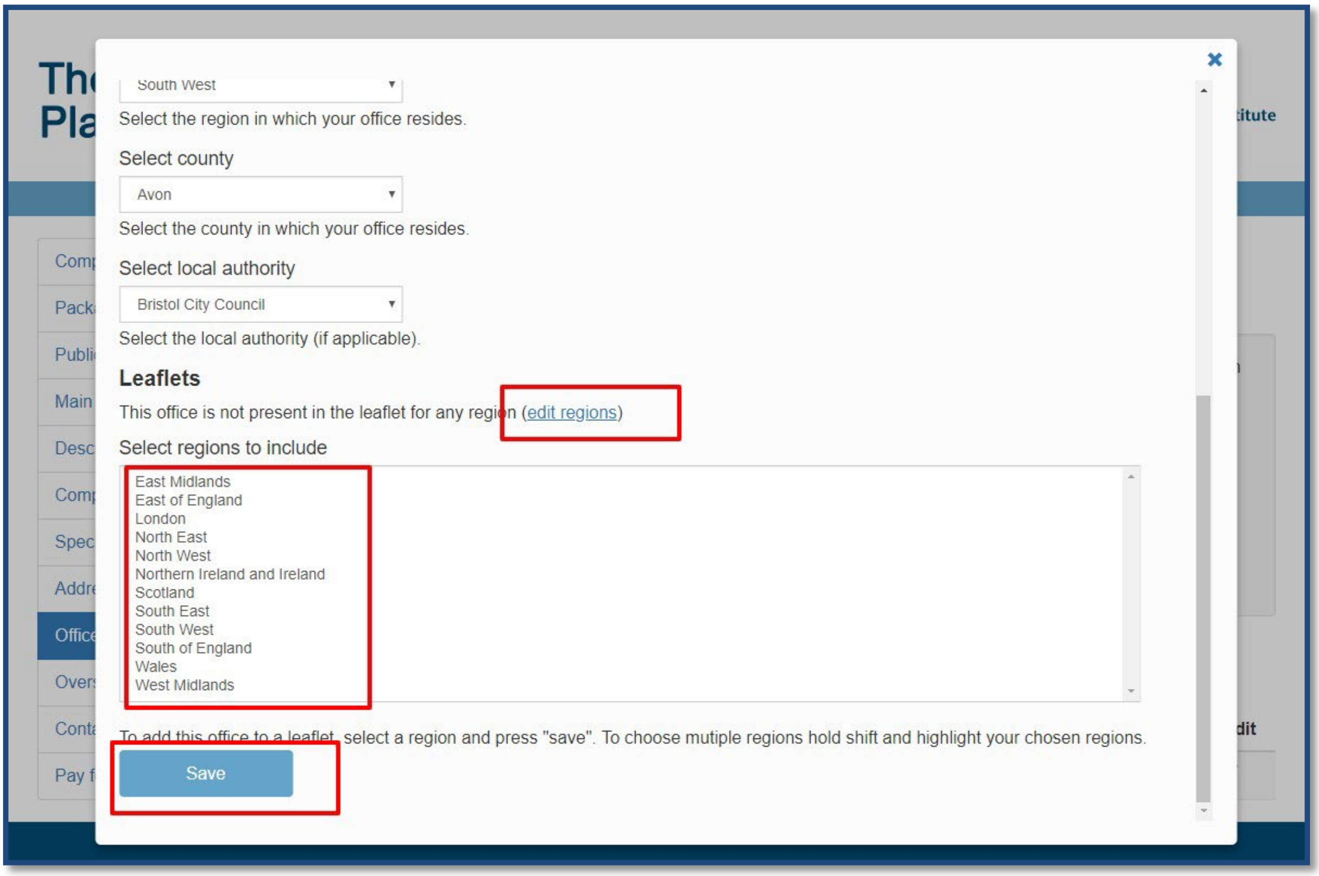
Adding an Office to a leaflet

You can add one of your offices to one of the RTPI’s printed leaflets by clicking the **Edit** button for your required office.



Once an office had been added, the office information screen shows leaflet information at the bottom. Here you can select which regional leaflet you wish the office to appear on.

Click **edit regions**, select your leaflet and then click **Save** to retain your choices.



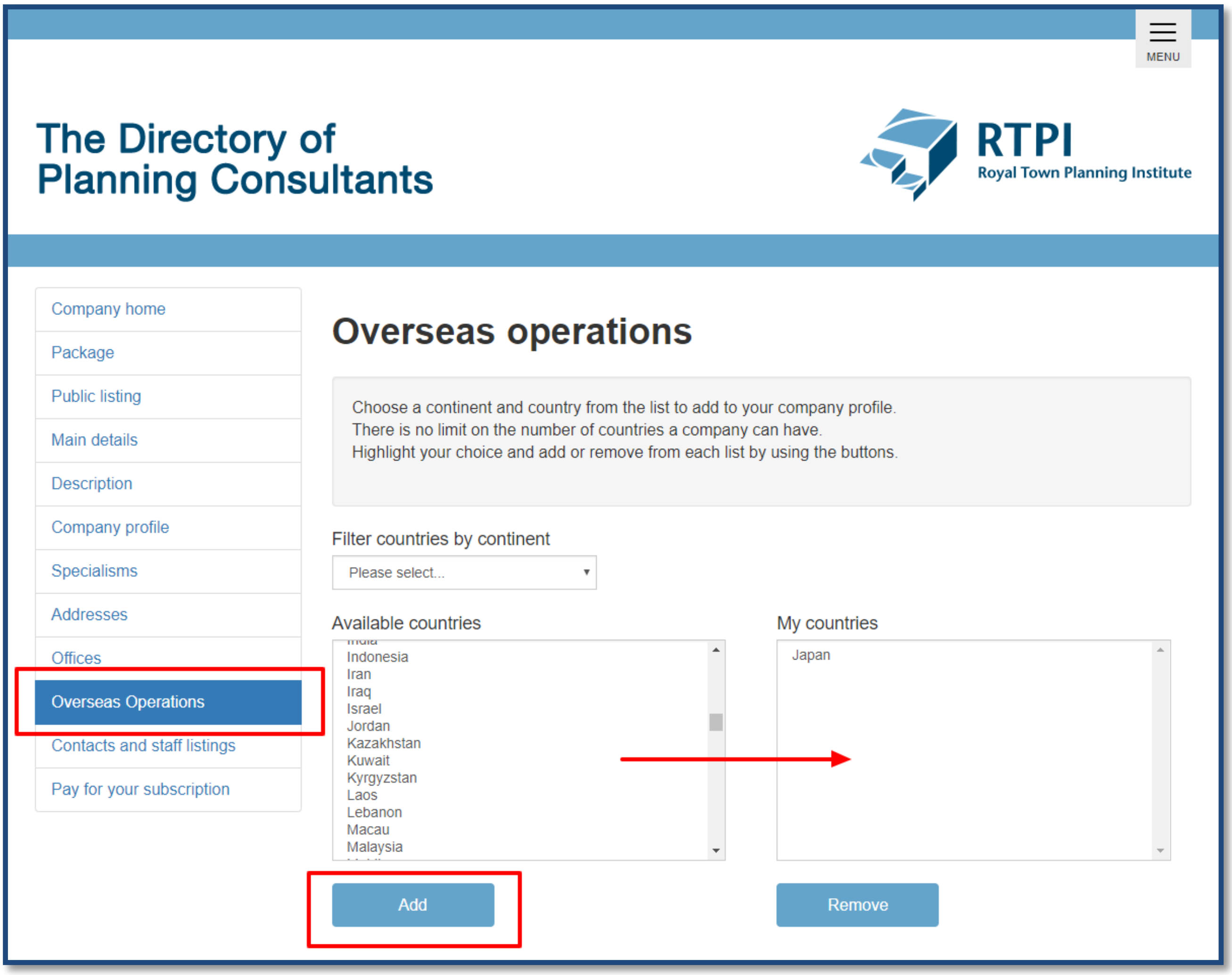
Overseas operations

In the **Overseas Operations** section you can list the countries the the company operates in.

On the left is a list of all available countries and on the right is a list of the countries you have selected. To add to the company list, highlight a country from the left hand list and click **Add.**

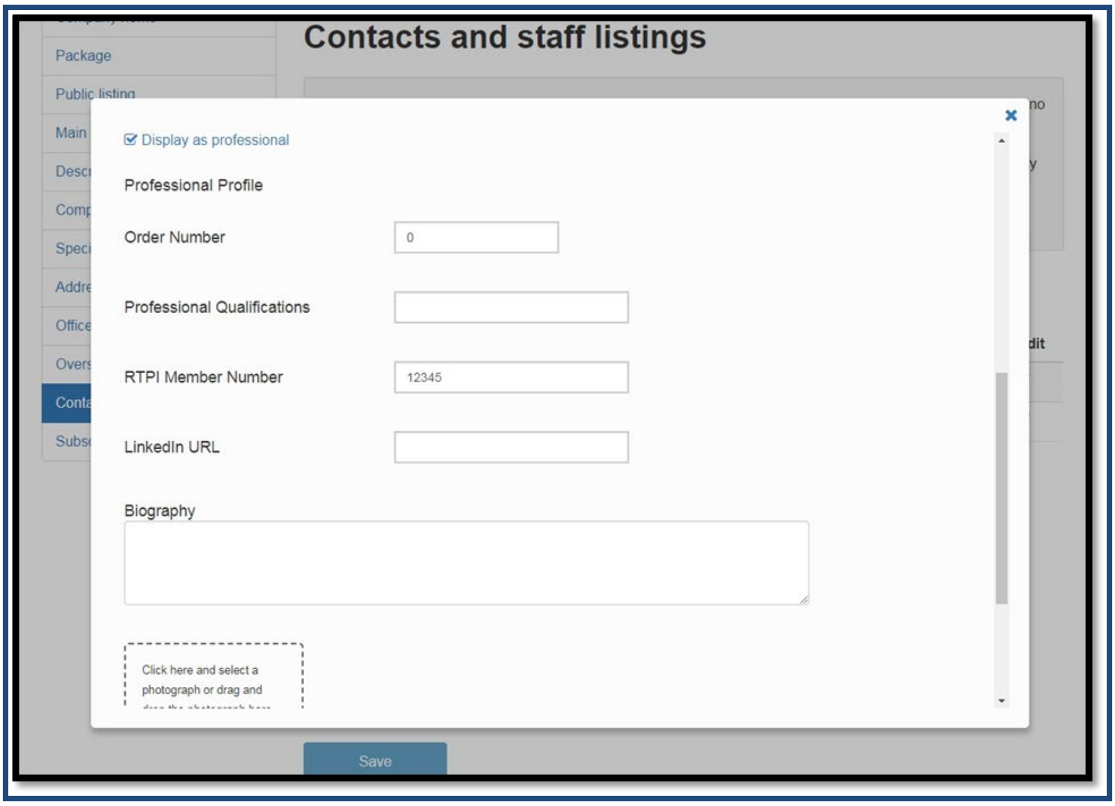
To delete a country from the company's public facing list, highlight a country in the company's list and click **Remove.** You can highlight multiple countries in one go.

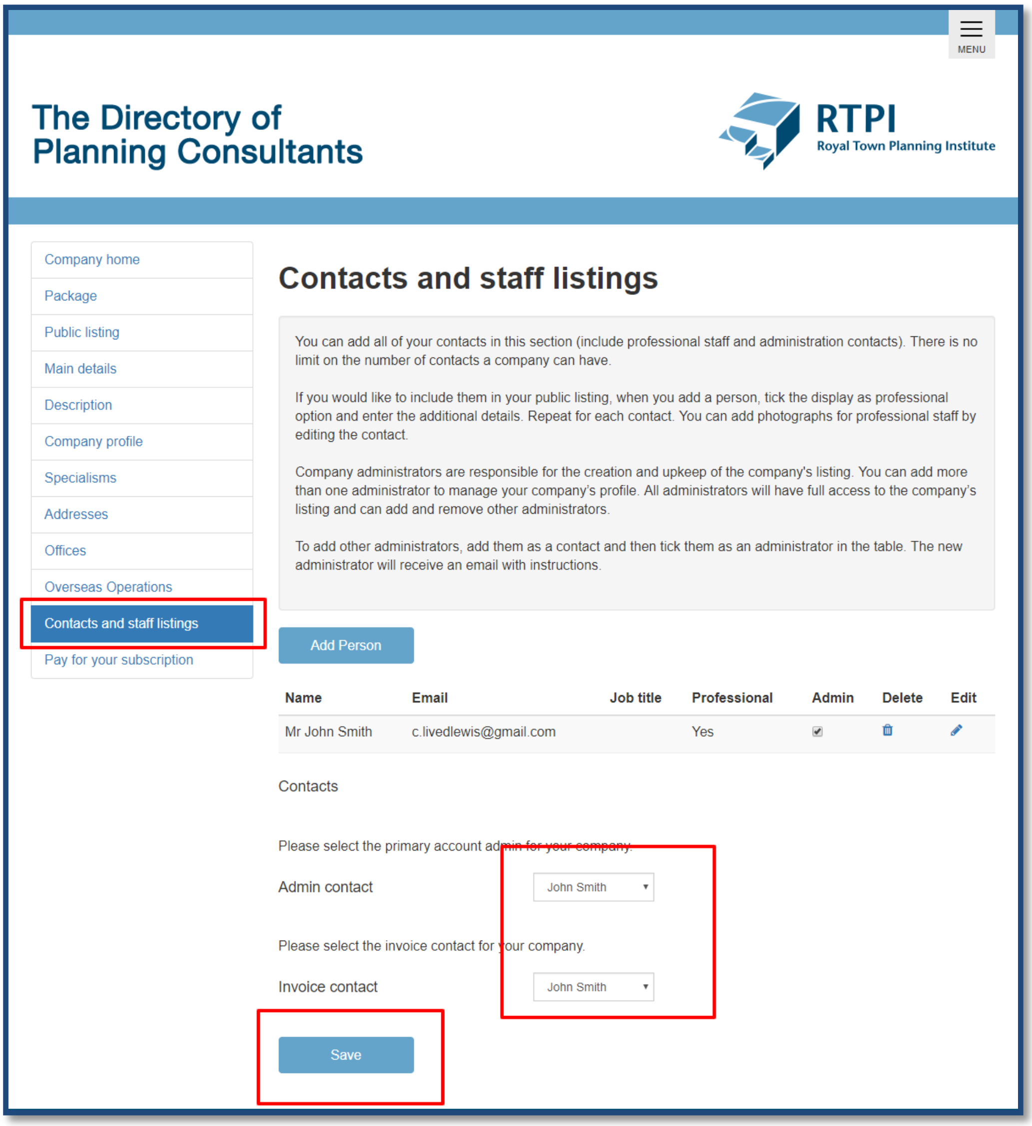
To make finding a country easier you can use the drop-down menu to filter the country list by continent.



Contacts and staff listings

In this section you can add to your contact pool (your non-public facing list of contacts), administer your public professional staff listings and indicate your contact (admin) members of staff (i.e who RTPI would contact if needed).


Contacts and staff listings
Package
Public listing
Main
Display as professional
Professional Profile
Order Number
0
Professional Qualifications
RTPI Member Number
12345
LinkedIn URL
Biography
Click here and select a
photograph or drag and
Save



Contacts and professional staff members are both listed in the same table. Professional staff members (those listed on the company's public profile) are indicated in the **Professional** column.

Those accounts that have the permission to log into these company admin pages are indicated with the **Admin** tick box.

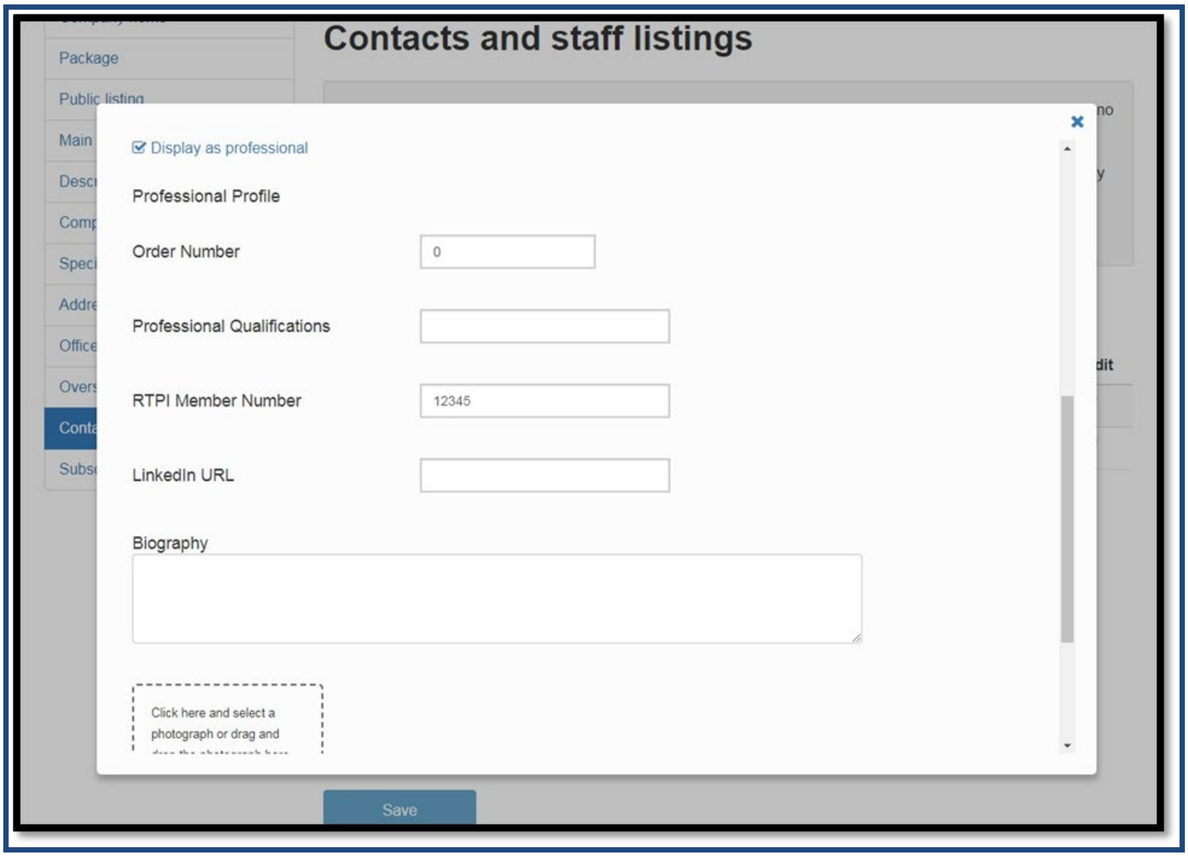
To remove or edit a contact's details, choose **Delete** or **Edit** from the menu options.

Contacts are added using the **Add person** button which will open the pop-up editor.

Here an administrator can enter the contacts details and select if they are to be displayed as a professional on the company profile.

If **Display as professional** is ticked then additional details are required, including an RTPI number and an optional photo file.

To upload an image file, drag and drop or click to open file uploader dialog box as shown on the following screen.



Save must be clicked to retain the updated information.

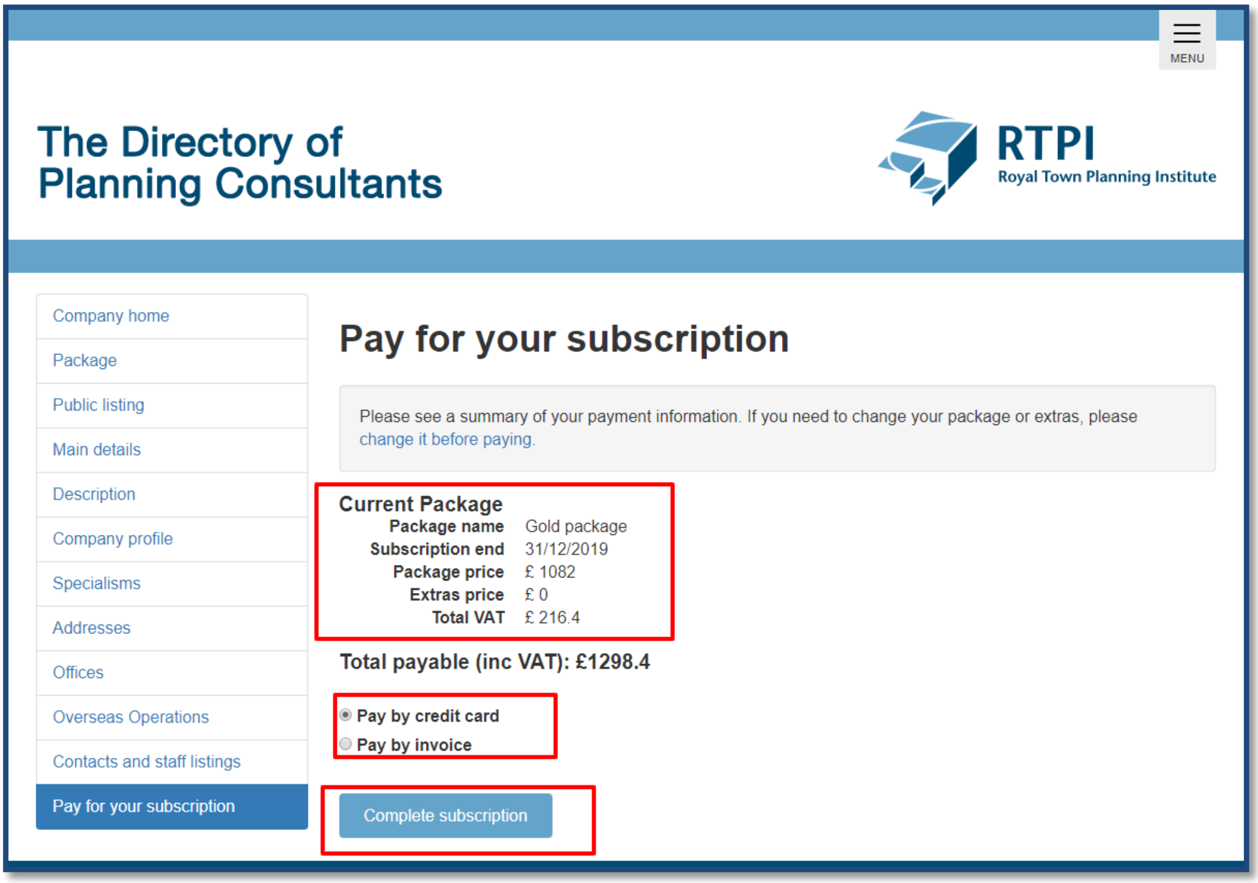
Subscription payment

The final screen in the company admin section is **Subscription payment**. You can choose to change the package before paying (the **change it before paying** link taking you back to the **Package** section).

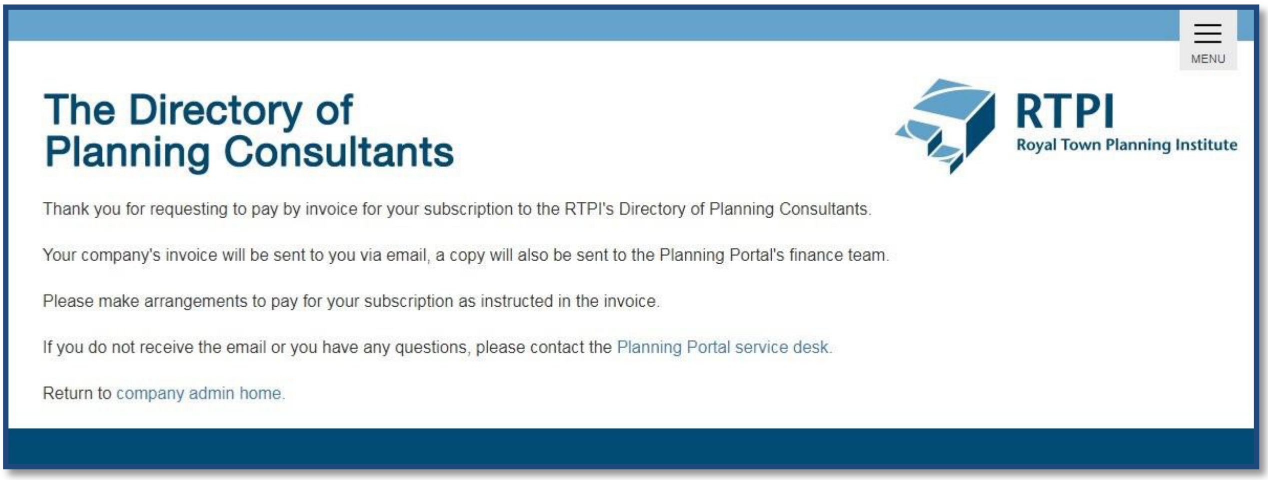
Select from Credit card or Invoice as a payment method (Invoice is only available for payments over £1,000). To make payment, click **Complete subscription.** The credit card option will direct you to the payment page, which will present a confirmation page when payment is sucessful.

You can review your exsisting details in the **Current Package** section. If you are a *new subscriber*, this will show the package and end date you have selected, if you are *renewing a subscription* this will show your exsisting package and end date (before renewal).

Selecting the invoice button will generate an email which is sent to the PPQ finance team at Creditcontrol@planningportal.co.uk and to the company admim. The following on-screen confirmation will also be presented to the company admin.

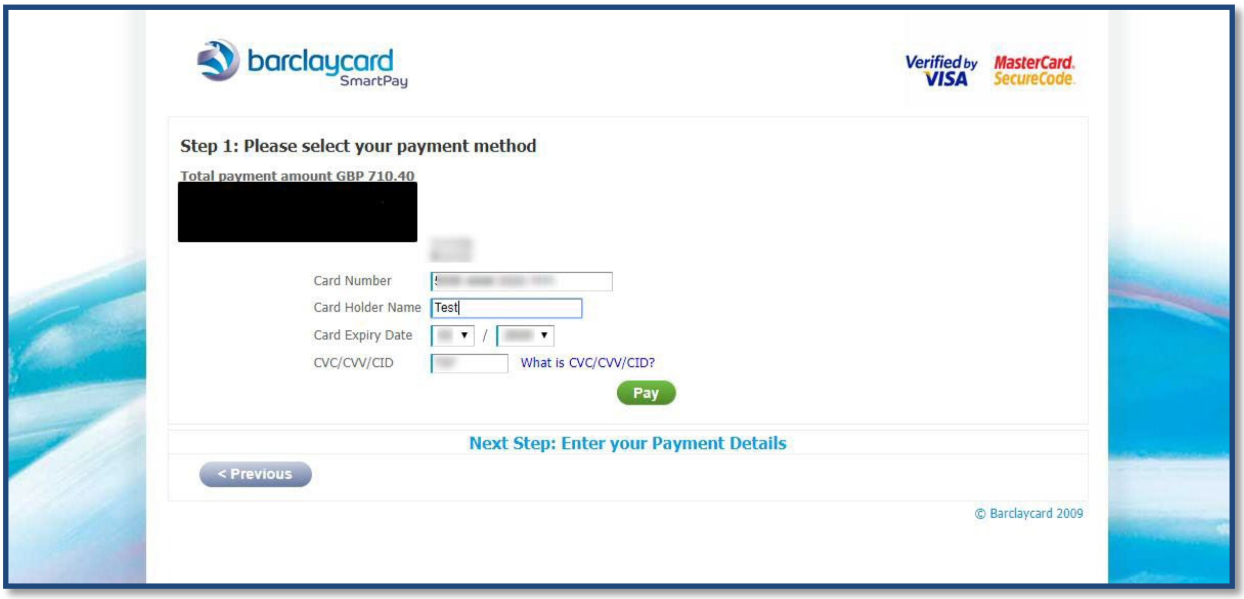


Clicking **Complete subscription** with *Pay by Invoice* selected will email you an invoice and present the following confirmation screen.



Your listing should now be live. Please contact our service desk on 0333 323 4589 or rtpi.support@planningportal.co.uk if your listing is not showing.

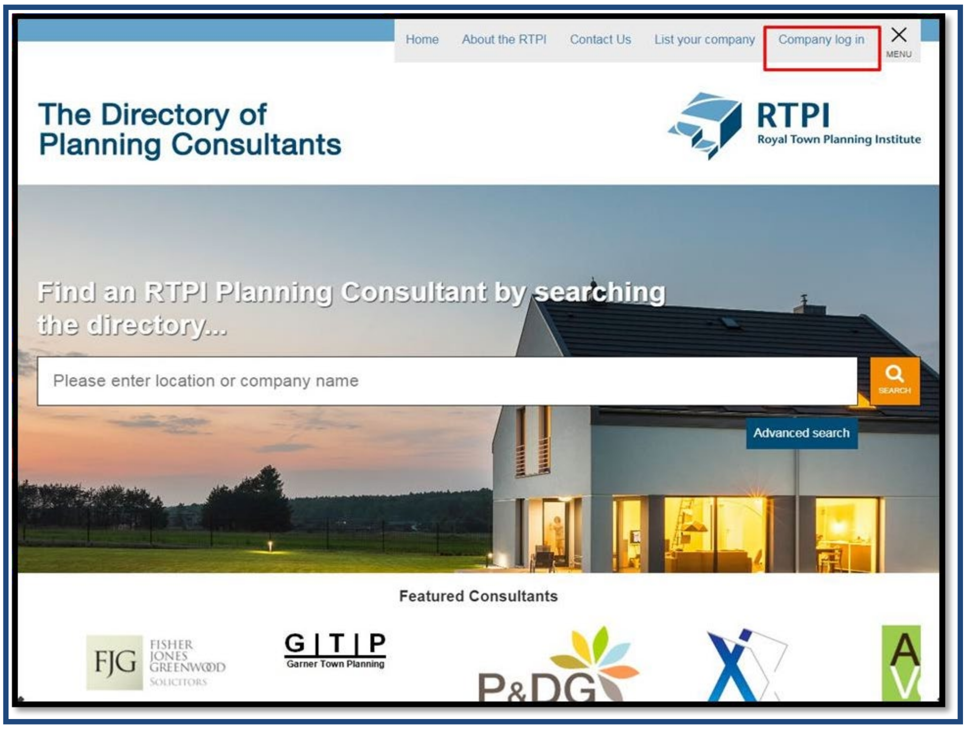
Clicking **Complete subscription** with *Pay by credit card* selected will take you to our Barclaycard payment facilities.



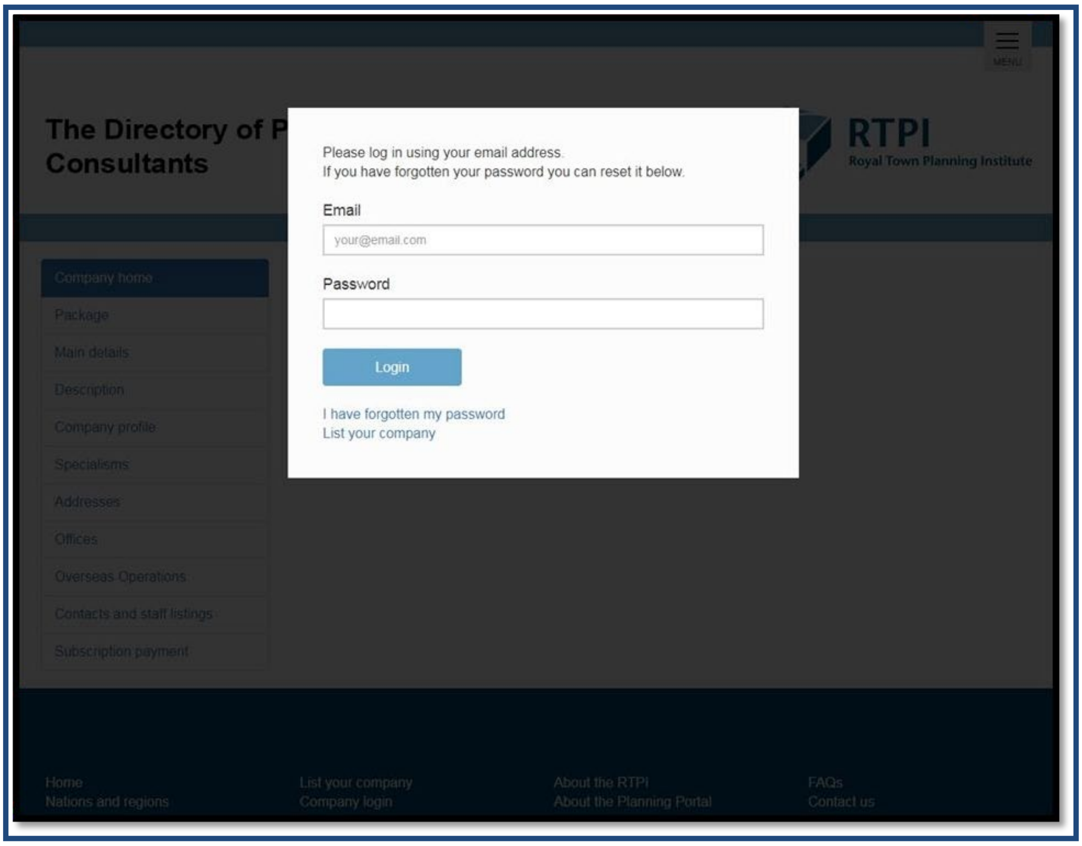
Once payment has been made, you will be returned to your **Company home** page. Your listing should now be live. Please contact our service desk on 0333 323 4589 or rtpi.support@planningportal.co.uk if your listing is not showing.

Logging back into your account

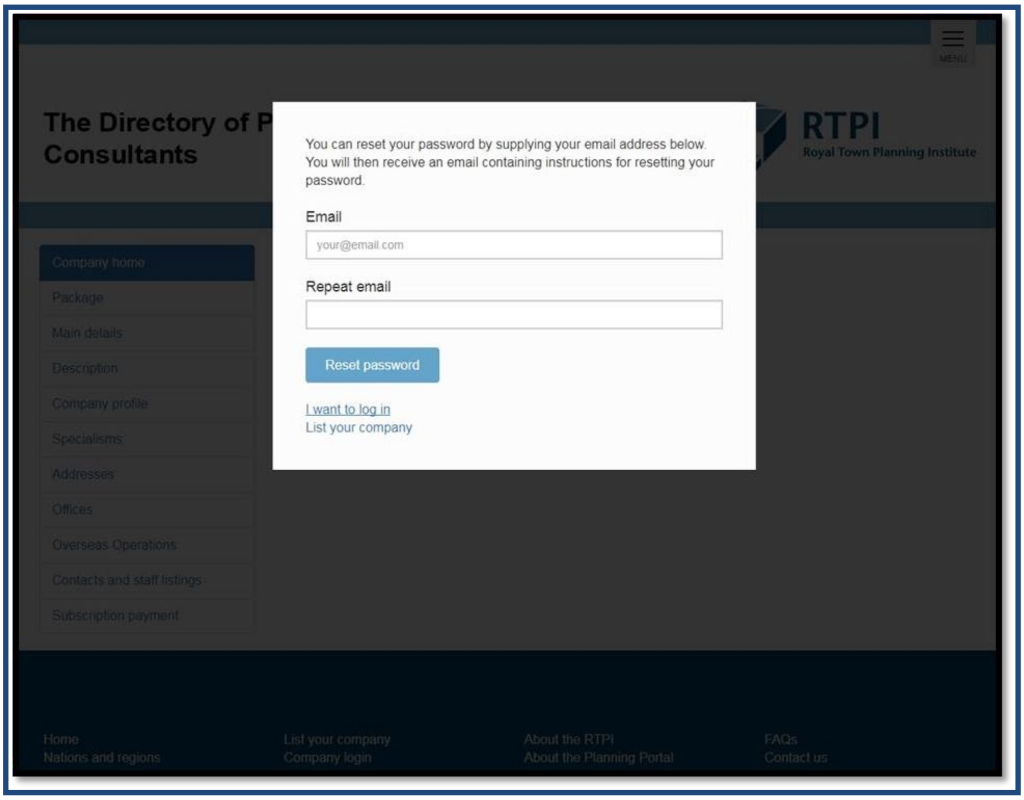
If you want to log into your account to access your **Company home** pages or edit your listing, please visit the home page at https://subscription.rtpiconsultants.co.uk/ and click **Company log in** from the expandable menu at the top of the page.



You can log in with your **email address** and **password.**



You can perform a password reset by using the **I have forgotten my password** hyperlink, below the login button.



Renewing your subscription

If you have an existing RTPI directory listing and subscription and want to renew your listing for another year, please see our **Renewing your RTPI Subscription** here:
https://www.rtpiconsultants.co.uk/media/1793/rtpi_directory_guidance_note.pdf

Help and Support

If you need any assistance, please contact our service desk on 0333 323 4589 or email rtpi.support@planningportal.co.uk.

The telephone help line is open 09:00 - 17:00 weekdays (excluding public holidays).