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Linku2 Regional Site

Standard Operations Manual

Contents

The Websites and WP Engine

WP Engine is the hosting service we use for our Linku2 WordPress sites. Across the sites we use the same basic theme and anywhere between 15-20 in-built programmes and added plugins (a plugin is a piece of add-on software that helps make the base software (WP Engine) perform additional functions). Many of these are only managed by Support Office.

Our Linku2 Regional sites the Licensee and any Client Manager teams use **fourteen** of these programmes and plugins being –

- Businesses
- Contact CRM
- Sliders
- Forms
- Media
- Posts
- Analytics
- Insights
- Social
- Pages
- Events
- Classifieds
- Spreadsheets
- Comments

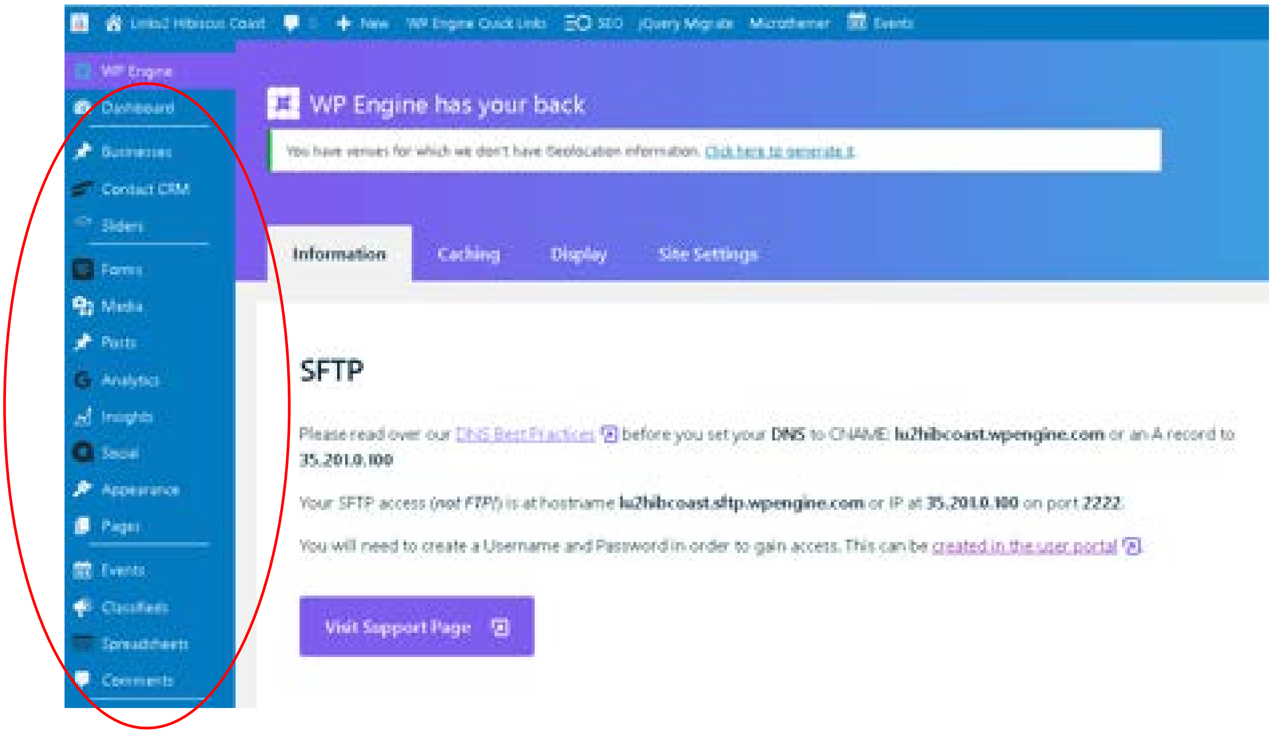
When referring to the website there are 2 terms to keep in mind –

- **Backend** – where all the site work is complete and actions taken
- **Frontend** – the public view of the site

Linku2 Regional sites WP Engine Management

Linku2 Regional site WP Engine management activities are very user friendly and can be undertaken by anyone with minimal website backend experience.

All activities come with clear Step by Step Guides, full training and on-going support.



The site SMART Link Plans and community listings are predominantly managed through **2 main WP Engine plugins**. These are -

- **Businesses** - Used for all business listings on site. This includes all the business listings in the Business section plus all listings such as clubs, schools, libraries, etc. The information that appears on the frontend site is extracted from these listings.

- **Contact CRM** – Used for all Client and Contact management including full Contact details, advertising status, tags, notes and communications with contacts. This is also the hub for ***all*** communications including emails, newsletters and site management Automations.

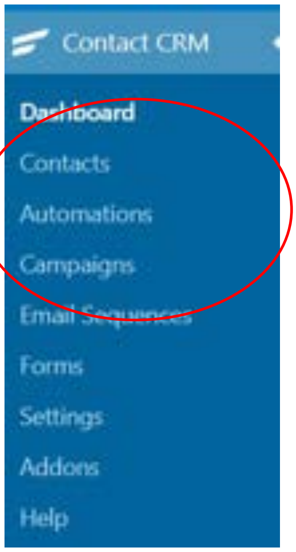
Other plugins used are –

- **Sliders** – Used for the sliding image side adverts, Sponsor banners, any client image sliders on their personalised pages and available for use in any other required circumstances, eg one may be added when advertising an event, or on a specials page
- **Forms** – Used for sign-ups (both for advertising and user sign ups), giveaway forms, etc. All forms are linked directly to Contact CRM Lists and Tags
- **Media** - Where all images and videos are stored
- **Posts** – Used for blog posts and articles
- **Analytics** – Used for Google stat reporting – Analytics and Search Console

- **Insights** - Rankings, backlinks and trend reporting
- **Social** – Used for social Reviews and Feeds
- **Appearance** – Menus only - Used for changing menu links (only when changeover of giveaways)

Contact CRM

This is where all your task management, emails and contact information is held. The only main tabs you will use are –



- Contacts
- Automations
- Campaigns

Contacts

Contacts tab has 4 sub-tabs – All Contacts, Lists, Tag, Segments. When you open a Contact from any of these there are 4 sub-tabs – Overview, Emails, Form Submissions and Notes & Activities.

Overview Tab - This is where you will find all information we hold on that Contact. Fields that ***are required*** are First Name, Last Name and Email. There is also custom information which we capture for each Contact type such as advertising dates, Sections, Categories, etc for businesses.

Emails – Under this tab you will create and find any emails for that specific contact. This will contain a full record of all emails sent, sequences or automations that contact has been through

Form Submissions – This is where you'll find information on any forms completed by the Contact

Notes & Activities – This is where you can record any information you wish and save files for the Contact

Automations

For Linku2 Regional sites the general management of many activities are run through Contact Management Automations.

An Automation is a series of actions, triggered by email reminders or automatic sending of emails that make it easy to keep track of continuous things going on through the site.

Full descriptions and breakdowns of each Automation will be described later.

It is ***imperative*** Automations are full understood and managed carefully and correctly. This will ensure the smooth running of the site. If it is not done correctly there will be chaos so get it right!

Campaigns

The Campaigns tab (called "Emails" when you are in the programme has 4 sub-tabs – All Campaigns, Email Sequences, Email Templates and All Emails.

This is where email campaigns (newsletters) are set up and sent, email sequences (series of emails) can be created (note these have to be activated by an Automation), email templates are created/edited and stored and you can view all email activities.

Forms tab – There is also a tab "Forms". Forms can be set up here but we tend to do this directly through Fluent Forms Pro which is integrated.

Contact Management

Contact CRM also helps you to distinguish all the contacts you will converse with and is how you can organise target marketing and avoid mass emailing, which of course we all know results in loss of contacts and complete chaos!

To do this Contacts are managed through "Lists" and "Tags" as follows –

We have **ten types of Contacts in Linku2 Regional sites**, which are divided in Contact CRM into Lists. These are -

- **Users –** These are people who use our site and are on our newsletter list. They have been captured via sign up forms, entering competitions. These do not include business contacts or other types of contacts.
- **Businesses** – These are local businesses listed in our directory. Currently we do not have a contact email for all listings although that is what we would prefer. These are businesses who are not clients or advertised previously. They get regular newsletters.
- **Clients** – These are local businesses who currently take one of our Plans whether a SMART Link Plan or a SMART Community Plan
- **Renewed Client** – A client who has renewed their advertising plan
- **Renewed Client 12 month** – A client who has renewed their advertising plan who is on a 12 month plan
- **New Client** – A business which has signed up and is in their first advertising term
- **Old Clients** – These are local businesses who have advertised with us in the past but are not current Clients
- **Community** – These are any non-profit services, eg clubs, community groups, schools, churches, etc
- **Event Organisers** – These are any service that organises events in the local community and would use the event calendar, eg a local theatre, pub which has live music or sporting events, markets, school gala contacts, etc
- **Internal Communications** – Linku2 Regional site management and staffing

There may be other Lists depending on any features or activities that may be run, eg Flavours, etc although these may be better sub-divided in the Tags option below.

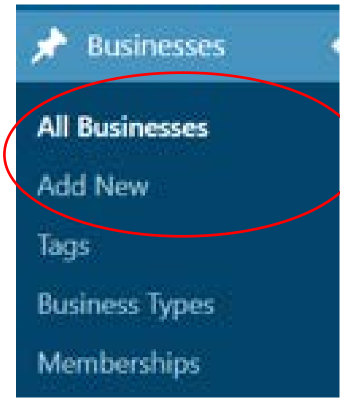
Other information captured to target the right Contact for the right information is through Tags which are sub-divisions of Lists.

Tags - Further breakdown of the Lists, eg Clients will be broken down into their Sections, eg Property, Babies, Health, etc. also into their Plan types, eg Sponsor, Deluxe, etc. Community is sub-divided into tags such as schools, clubs, churches, local services (which will be rubbish services, libraries, etc)

Businesses

This is where all online information is held for a Contact and is used ***ONLY*** for online public listings and social links as communications, advertising dates, etc are all held and managed through Contact CRM.

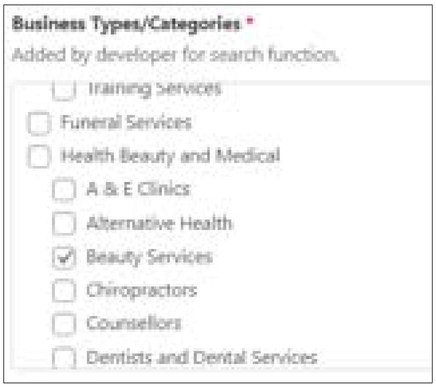
Listings are mostly businesses/services however this also lists all community listings anything free, eg walks, waterfalls, national parks, etc this is because these are shown on site in the same or similar format at business listings.



The only tabs you will use under the Businesses plugin in Linku2 School Holidays are –

- **All Businesses** – Actual online listings
- **Add New** – To add a new listing. This can also be done from a button at the top of the All Businesses tab.

Business listing information shown is determined through Business Types and Memberships.



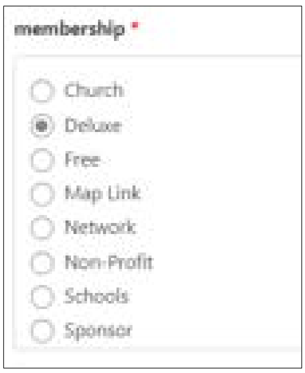
Business Types

Essentially these are the categories that you select when in a business listing which determined which site page the listing appears on. They are for example Travel, Tourism and Local Activities parent Section, Things to Do category. These are selected from a tick box drop down menu when setting up the business. Ticking and unticking will turn the listing on and off.

These include all business directory categories however also include the listings for the community section, eg clubs, churches, schools, libraries, etc

Membership

This is the selection box you tick to determine the Plan which that business is on, eg Sponsor, Free, etc. There are seven different Membership options to choose from being –



- Sponsor
- Deluxe
- Web Link

- Free
- Non-Profit
- Schools
- Church

The fields that are shown for each have been pre-determined in the templates. These are only accessible by Support Office and are not adjustable.

Business Listing Fields

Once you open a business listing to update or a new listing this consists of –

Title: Business name

Content: This is the content that is shown from an online business “Read More …” link. The read more link is only visible with either paying clients (Sponsor or Deluxe Plans only) or listings under any of the community Memberships (non-profit, church, schools).

Examples of on site pages showing their public appearance are below. In the meantime the backend business listings appear as here.

Other Membership types this area will usually be empty.

This read more link (Content pane) should be packed with personalised and SEO optimised information for the listing.

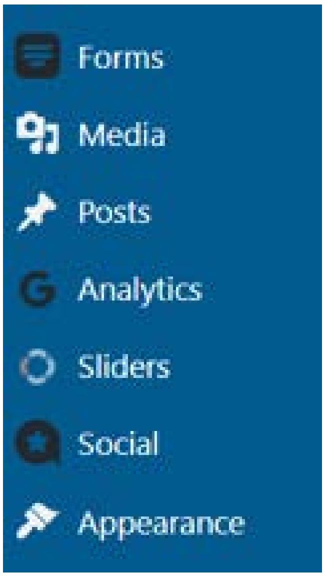
Below is then a series of “Directory Listings” boxes for the listing information as follows (asterisk denotes required fields) –

- Phone*
- Email
- Web address
- Address*
- Suburb* - This is your suburb
- Business Types/Categories* - In here you tick all areas your business should be listed, eg if they have outlets to appear on site under this one listing in North Shore and West Auckland then tick both. If a business has two locations they want listed with different contact info or activity details you will need separate business listings for each
- Schema business type – This is your schema entry and must be filled in, check at schema.org

- Membership* - This is the listing type, eg free, Deluxe, School, etc
- Price range – just put in here $
- Area Serviced – Put in here usually the Region of your site, eg Hibiscus Coast, North Shore but if there is a selection of surrounding areas or say the business specifically wants perhaps Orewa you can put this here (this shows on the public listing)
- About us url -This, plus the following 2 fields, appear as buttons on the client web page, link these to their relevant site pages, try to fill these in if you can but if you don't the buttons do not show publicly.
- Services url
- Contact us url
- Keywords – Enter keywords for the listing here – add a comma between each keyword or keyword set but ***<u>no spaces</u>***
- Main short description – This is the short description which appears on all SMART Link Plans and community listings just above the Read More … button
- Map location – No need to complete this as it is picked up automatically from the address fields above (if this shows blank or an error ignore this as it is a glitch but do just check the map in your listing)
- Gallery – leave this blank
- Business Name (*added by Vincent)* – This is again the business name and ***<u>it is essential</u>*** to complete this field as it is the field used by the site search box
- SEO (***these fields are all very important and key in your site SEO***) –
    - Title settings – Complete these as they are the Google meta data that appears publicly
    - Social – Complete these as they are the Facebook and Twitter information that appears publicly
    - Advanced – Nothing to complete
    - Redirection – You will only use this to redirect a page if a client stops advertising and you don't want the old page to be found through search engines
- Target keywords – complete this using the same keywords as the keywords field above

Remember many of the above fields appear on site if the Membership boxes for Sponsor, Deluxe or community listings are ticked so make sure they are correct, eg a client may have a different email address they want shown on site from that you deal with them for your internal communications. Here you will put the public listed email address and the personalised one for communications is the one that will be the one listed in the Contact CRM Contact listing.

Other Plugins



Forms

For sign up, giveaway or competition forms - This is where your forms are created and stored for the site, including all entry information. Details on set up etc is found in your procedures. These integrate with Contact CRM to capture the form users information into specific CRM Lists and Tags.

Media

Where all images/videos are held – This is where you'll find all your images. When you upload an image if perhaps you are setting up a business or doing a blog post this is where your image is stored. When you've uploaded a new image, make sure in Media it has alt text as this all helps with SEO.

Posts

For blog posts and articles – If you do blog posts (this is usually done by Support at least initially) this is where you set them up. Full instructions will be provided if required.

Analytics

For Google stat reporting – Under this plugin you will find direct links to Google Analytics and Search Console. Instructions on accessing your stats through Analytics and Search Console for reporting is found in your procedures.

Sliders (Soliloquy)

Sliding linked images - Where you add, remove, set up side adverts, sponsor banners, sliders for client pages or blog posts, etc.

Social

For social feeds and reviews – For stats. This is also where you chat widget is located.

Other Programmes/Tools

To manage your Linku2 site you will use various other programmes as follows -

Microsoft Word and Excel

To manage documents and spreadsheets. You will need a reasonable knowledge of how excel works however templated spreadsheets will all be provided.

Xero

Xero accounting software is used for account management. Part of your role will be to reconcile accounts, issue invoices and prepare and file GST returns which will mean you will also have access to IRD related accounts. You will also be required to ensure invoices are paid on time or do the follow ups.

Canva

You will have access to a shared Canva programme. This programme is used to create, resize, etc images.

Social Champ
Social Champ is used for social media sharing and scheduling.

PaintShop or other Image Programme
PaintShop (or similar) is also used to work with images. Resizing, saving, effects, etc.

ColorCop
ColorCop is a useful colour picker tool. If you want to match colours in an image, eg to match your text in an advert copy use ColorCop.

Dropbox
Dropbox is used for file storage and sharing.

Google Gmail
Google is our preferred programme and gmail is our preferred email provider. Your email will be provided to you from Linku2.

Google Calendar
Used for all activities, tasks, events, reminders and scheduling.

Google Sheets
Useful for document sharing. May or may not be used.

Google Meet
Used for online meetings

All programmes/tools and training will be provided and full support available through the Linku2 Support Office.

Fundraising Programme

BUSINESS TRAINING GUIDES

Site Management and Step by Step Guides

In the management of Linku2 Regional sites there are a number of roles and activities.

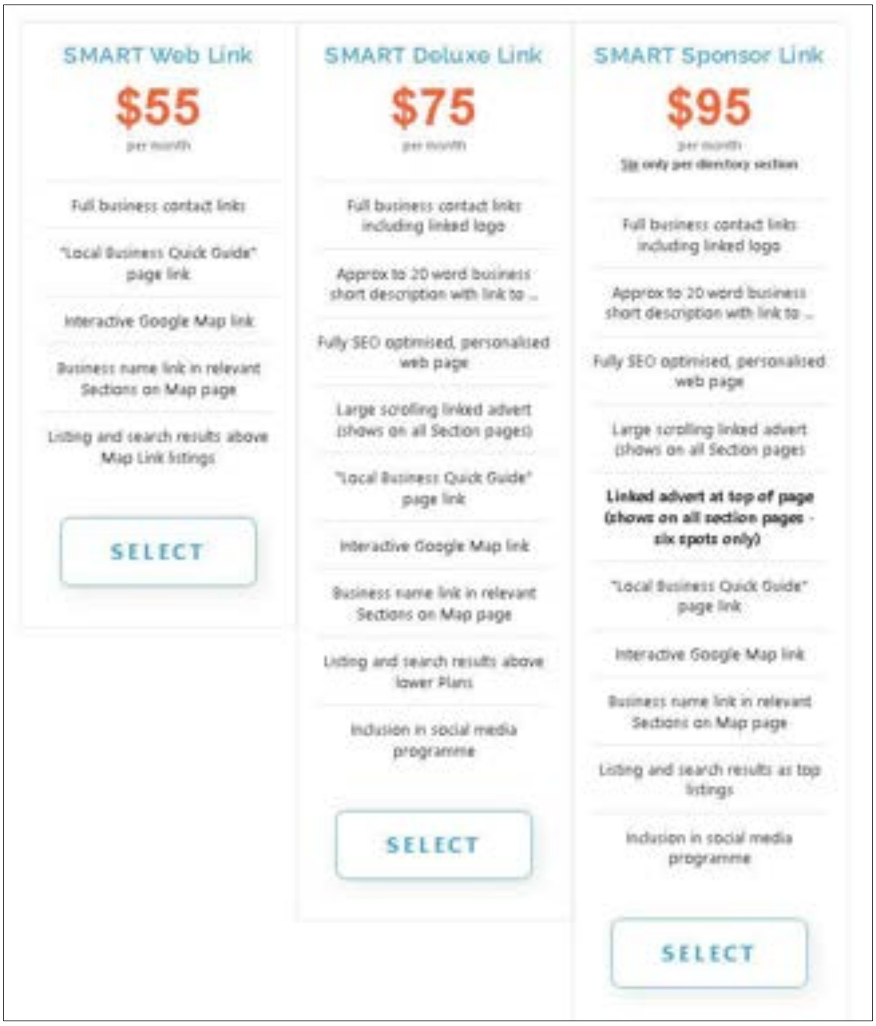
- Client Management Procedures (eg online set up, Automations, etc)
- Monitoring of site and businesses/listings
- Sales
- Xero and accounting requirements

Procedures

Business Listings - Paid and Free

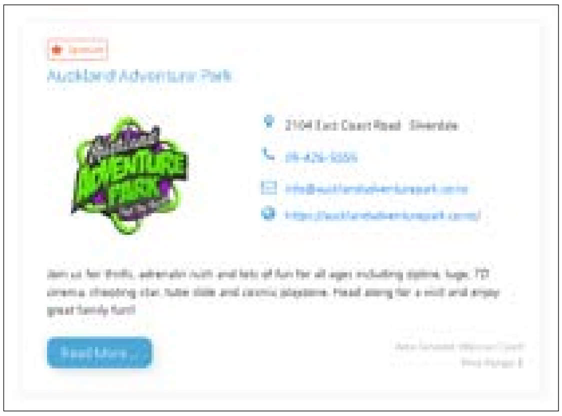
Business Directory SMART Link Plan clients are your main source of income for Linku2 Regional sites.

There are 3 SMART Link Plan options being Sponsor, Deluxe and Web Link. Current rates and what you get at April 2022 are -



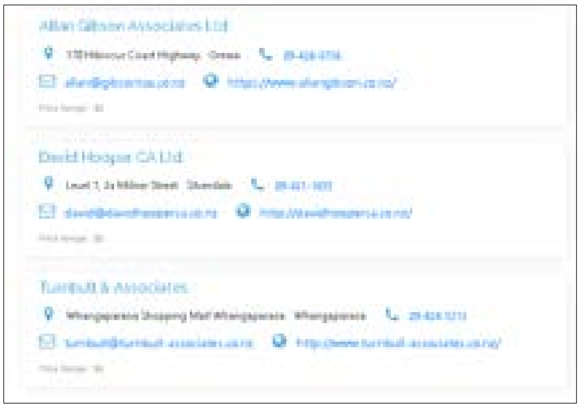
Onsite Listing Examples

Onsite listings look as follows -

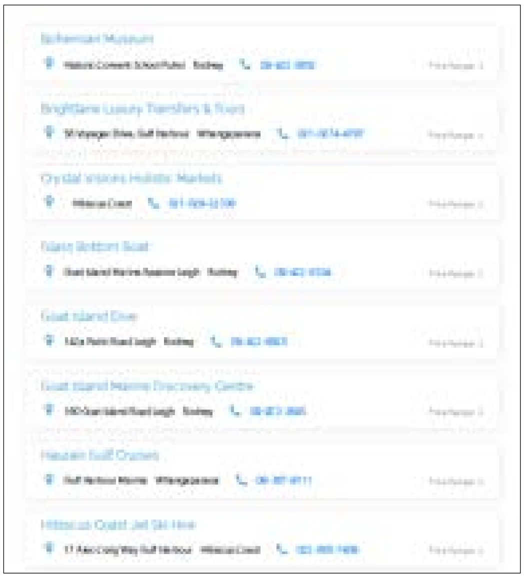


Sponsor listing

Deluxe listing



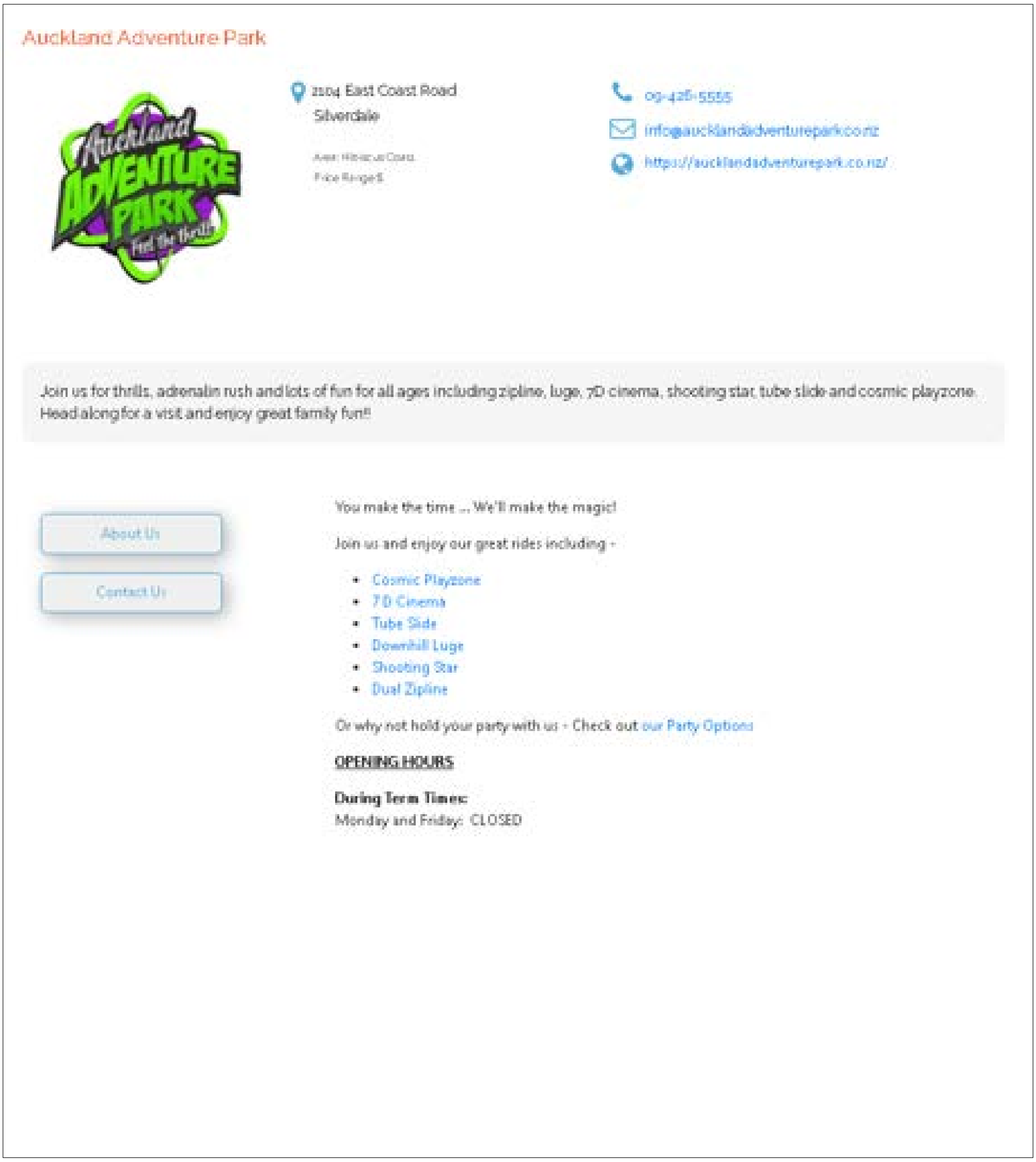
Web Link listings



Free listings

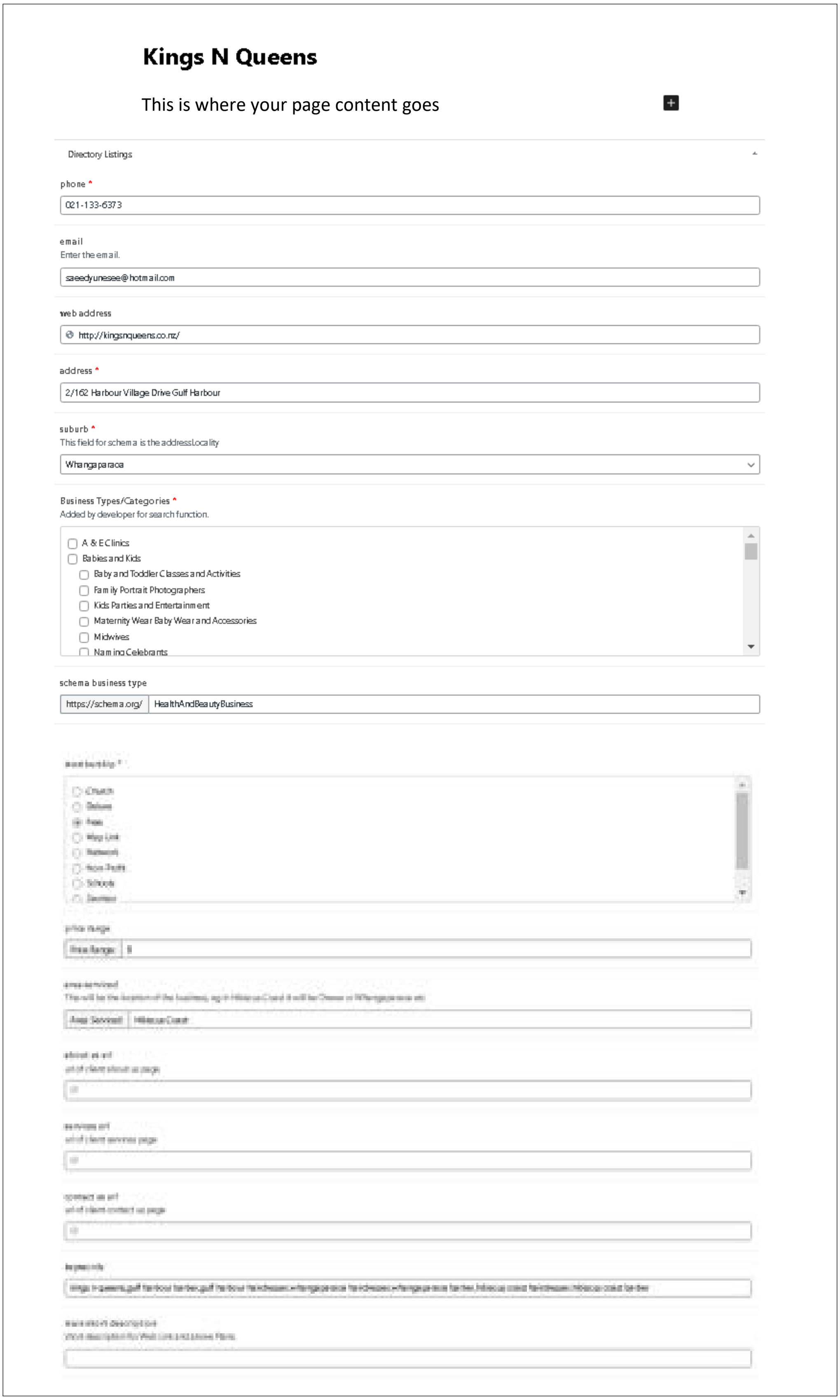
Both Sponsor and Deluxe listings have Read More links which go to a fully SEO optimised summary page for their business with whatever information and links the client chooses including specific buttons for About Us, Services and Contact Us. This page is used in many of the promotions we do for paying clients.

An example of the page is -



Backend Business Listing Example

All information for any type of listing in our Linku2 Regional sites is uploaded in the backend under the “Businesses” tab. A Business listing upload page looks like -



There is also a section at the bottom for search engine SEO and social SEO which is essential to fill in for at least paying business listings.

Backend Upload Procedures

Step by Step Guides for uploading on site contacts (Sponsor to Free) are as follows -

Step by Step Guide to adding Sponsor Client

ACTION
Gather web link required – either website, Facebook page or can be a specific page within a website (eg if want a link only to a school holiday programme page or maybe membership details page), logo, etc and open a client folder in Dropbox/Google Drive
In Contact CRM check to see if there is already a Contact if not set up a new contact, add in ***<u>all fields</u>*** in full
Go to Canva - set up 350 x 350 px logo image (this goes in Featured image in right column in the business), set up a side advert 614 x 300 px – this is also used for the social tag images and a Sponsor image 800 x 150 px
In WPEngine go to Businesses and first check to see if there is a listing (should be) - use this. If there isn't one set up NEW. Fill in all fields including meta information and social tags
Go to Sliders – pick your Section slider | Add your 614 x 300 px image – Make sure you add client name, alt text, client website url | tick the "Open url in a new window" box | enter your client advertising start and end dates (this will take the ad off site automatically) | SAVE
Add side advert in any other Section sliders the business is listed in and again remember to link and schedule
Go to the Section Sponsor slider and replace one of the holder images with your sponsor image. Again make sure you add client name, alt text, client website url | tick the "Open url in a new window" box | enter your client advertising start and end dates (this will take the ad off site automatically) | SAVE
Go to Sections and check business listings and adverts appear in the right column and are linked
Go to Google My Maps | Open Linku2 Hibiscus Coast - Whangaparaoa Map
Add client either by entering the address in the search column or by a pin drop | Add name | short description | logo
Share | Embed and copy link
In WP open Map page | Enter new code for updated map in code box and make 100% wide | SAVE
In Map page add business listing in all relevant sections below the map and link these | SAVE
Go back to Contact CRM | Email this client with NEW CLIENT – Initial Report – SPONSOR template
In Contact CRM then add them to a list either "New Client" or "Renewed Client" – this will activate the Automation for their 6-month mid-term report and renewal details
12-month client: If they are a 12 month client remember add tag for either "New Client 12 months" or "Renewed Client 12 months"
Go to Xero | Check if already have a contact | If not set up new | Fill in all details | Create invoice and send with template email
Set up a repeating invoice in Xero
Make sure you have added to your specific client group in Xero
In Social Champ set up 2 x posts – 1 for approx. 42 days after ad start date and another approx. 120 days after ad start date OR set up first post and schedule a reminder for a second which you can do once you do your mid-term report

Step by Step Guide to adding Deluxe Client

ACTION
Gather web link required – either website, Facebook page or can be a specific page within a website (eg if want a link only to a school holiday programme page or maybe membership details page), logo, etc and open a client folder in Dropbox/Google Drive
In Contact CRM check to see if there is already a Contact if not set up a new contact, add in ***all fields*** in full
Go to Canva - set up 350 x 350 px logo image (this goes in Featured image in right column in the business) and set up a side advert 614 x 300 px – this is also used for the social tag images
In WPEngine go to Businesses and first check to see if there is a listing (should be) - use this. If there isn't one set up NEW. Fill in all fields including meta information and social tags
Go to Sliders – pick your Section slider | Add your 614 x 300 px image – Make sure you add client name, alt text, client website url | tick the "Open url in a new window" box | enter your client advertising start and end dates (this will take the ad off site automatically) | SAVE
Add side advert in any other Section sliders the business is listed in and again remember to link and schedule
Go to Sections and check business listings and adverts appear in the right column and are linked
Go to Google My Maps | Open Linku2 Hibiscus Coast - Whangaparaoa Map
Add client either by entering the address in the search column or by a pin drop | Add name | short description | logo
Share | Embed and copy link
In WP open Map page | Enter new code for updated map in code box and make 100% wide | SAVE
In Map page add business listing in all relevant sections below the map and link these | SAVE
Go back to Contact CRM | Email this client with NEW CLIENT – Initial Report – DELUXE template
In Contact CRM then add them to a list either "New Client" or "Renewed Client" – this will activate the Automation for their 6 month mid-term report and renewal details
12-month client: If they are a 12 month client remember add tag for either "New Client 12 months" or "Renewed Client 12 months"
Go to Xero | Check if already have a contact | If not set up new | Fill in all details | Create invoice and send with template email
Set up a repeating invoice in Xero
Make sure you have added to your specific client group in Xero
In Social Champ set up 2 x posts – 1 for approx. 42 days after ad start date and another approx. 120 days after ad start date OR set up first post and schedule a reminder for a second which you can do once you do your mid-term report

Step by Step Guide to adding Web Link Client

ACTION
Gather web link required – either website, Facebook page or can be a specific page within a website (eg if want a link only to a school holiday programme page or maybe membership details page), logo, etc and open a client folder in Dropbox/Google Drive
In Contact CRM check to see if there is already a Contact if not set up a new contact, add in ***all fields*** in full
Go to Canva - set up 350 x 350 px logo image (this goes in Featured image in right column in the business) and set up a 614 x 300 px image for social tag images (not used for side ad as not a feature in this plan)
In WPEngine go to Businesses and first check to see if there is a listing (should be) - use this. If there isn't one set up NEW. Fill in all fields including meta information and social tags
Go to Sections and check business listings appear in the right order and are linked
Go to Google My Maps | Open Linku2 Hibiscus Coast - Whangaparaoa Map
Add client either by entering the address in the search column or by a pin drop | Add name | short description | logo
Share | Embed and copy link
In WP open Map page | Enter new code for updated map in code box and make 100% wide | SAVE
In Map page add business listing in all relevant sections below the map and link these | SAVE
Go back to Contact CRM | Email this client with NEW CLIENT – Initial Report – WEB LINK template
In Contact CRM then add them to a list either "New Client" or "Renewed Client" – this will activate the Automation for their 6 month mid-term report and renewal details
12-month client: If they are a 12-month client remember add tag for either "New Client 12 months" or "Renewed Client 12 months"
Go to Xero | Check if already have a contact | If not set up new | Fill in all details | Create invoice and send with template email
Set up a repeating invoice in Xero
Make sure you have added to your specific client group in Xero
In Social Champ set up one posts over their advertising term

Step by Step Guide to adding FREE Listing

ACTION
Open WP Form (if one submitted)
In Contact CRM check to see if there is already a Contact if not set up a new Contact, add in ***all fields*** from the completed form or as located online
In WPEngine go to Businesses and first check to see if there is a listing (should be) - use this. If there isn't one set up NEW. Fill in all fields including meta information and social tags
Go and check online listing on site
Go back to Contact CRM | Email this client with NEW FREE LISTING - 1st email or if completed a form use NEW LISTING - Initial report for a FREE Listing from completing a form template
In Contact CRM then add them to "Businesses" and "First time business sign ups" Lists (the second will trigger a short automation - Automations

Renewal Client Procedure

Update Client Records

Allow approx. 1 hour to complete this per client

When client comes up for renewal ***update the records as below first*** then if you don't get a chance to gather stats and report to the client on that day **it won't mess up your renewal automations** -

Updating Client Record - *Do this on the renewal date*

- Go to Contact CRM
- Search on clients list
- Go to the Contact | Overview tab | check their details
- Ensure you add their **new advertising dates**
- Make sure they have been removed from "Renewed client" or "Renewed client 12 month" List (this should have already happened automatically)
- Then ***add*** **to the Renewed Client List (6 or 12 months)** - This will start the Automation again for their next term
- Go to the Email tab for the contact and scroll to the bottom to check the new Automation has been activated

Updating En Masse

If you have more than one renewal on the same date there is an easy way you can update each one -

- Open the Automation (Current Client 6 month or 12 month)
- Go to reports
- View all by showing the number of clients you have
- At the bottom you'll see the most recent completed (shaded in green)
- Click on their profile button | View full profile
- Change their dates | Update contact
- Add relevant Renewal Client list
- Then just go to their Email tab and scroll down to check this has been activated
- Repeat this by just clicking back to Automations and your relevant Automation

Next set up your new tasks for the client(s) in your Google calendar as follows -

Calendar Tasks (6 month clients)

For a 6-month client -

- Go to your Google calendars -
    - Create | Task (set for all day) for 90 days (13 weeks) from your renewal start date (1/2 way through the term)
    - Put your title - Client Name - mid-term report

    - In the description put - https://linku2.co.nz/client-mid-term-report/
    - SAVE
    - Create another task for your renewal date (set for all day)
    - Put your title - Client Name - 6-month renewal
    - In the description put - "https://linku2.co.nz/renewal-client-procedure/ - before proceeding check the auto renewal reminder has been out for at least 3 days if not push this task out for 3-4 days"
    - Check you are saving in the right calendar if you have multiple
    - SAVE

Tasks en Masse

Again note, like the renewal list adding you can do this en masse with copy and paste

Calendar Tasks (12 month clients)

For a 12-month client -

- Go to your Google calendars -
    - Work out date 120 days (17 weeks) from renewal date (1/3 way through the term)
    - On that date Create | Task (set for all day)
    - Put your title - Client Name - mid-term report 1
    - In the description put - https://linku2.co.nz/client-mid-term-report/
    - SAVE
    - Create a second task after 260 days (37 weeks) (2/3 way through the term) (set for all day)
    - Put your title - Client Name - mid-term report 2
    - In the description put - https://linku2.co.nz/client-mid-term-report/
    - SAVE
    - Create another task for your renewal date (*remember for 12 month clients they get an extra month free so this will be 13 months from the renewal start date*) (set for all day) - ***make it 3 days before actual renewal***
    - Put your title - Client Name - 12-month renewal due 3 days - make it all day
    - In the description put - "https://linku2.co.nz/renewal-client-procedure/ - before proceeding check the auto renewal reminder has been out for at least 3 days if not push this task out for 3-4 days"
    - Check you are saving in the right calendar if you have multiple
    - SAVE

Tasks en Masse

Again note, like the renewal list adding you can do this en masse with copy and paste

Gathering Stats

If this is a client you have renewed previously there are two ways to access a report template for that client. The easiest is probably -

- Go to the client Dropbox folder
- Find and open the word version of their last report
- SAVE immediately as a new file
- You can then work on your new document which should have all (or most) of the relevant links already in the content

Alternatively, you can -

- Go to the website media tab
- Search on first word of client name
- There should be a copy of their last renewal report
- If not (eg there's been a site clean since the last report) and you can't find anything in their folder you'll just have to treat this as a first time renewal

First time renewal

Use the **Renewal Client template** content below. If you are doing updates for more than say 2 first time clients it is easier to -

- Use the above template and first fill in all generic stats, eg overall site visitors and page hits, etc
- Then SAVE and use this completed template with the generic info already entered for each new client

Once you have created your new client report ready for stats you can start gathering stats, so -

- Leave your new report open
- Go to the 2024 Client stat collation spreadsheet (or whatever year) - the latest version you will probably find in the relevant year CLIENTS dropbox folder. If you can't find it you can just use a new one at the **2024 Client stat collation template**.
- Go back to each report and copy and paste the links into a new sheet in the spreadsheet and rename the sheet
- Use a new sheet for each client to make it easier to check
- If you have more than one client you are renewing go one by one to each report and copy paste
- You'll then find it easier to ensure you put the right stats in each sheet as you go
- After gathering all the stats you'll be able to put in each report individually

Gathering stats en Masse

If you have a number of clients to report on then the easiest way to gather stats

How to gather stats

For easy links to go to each page you need stats for you can use the links you've added in the client spreadsheets.

Analytics

- Gather and list their stats for the template from Wordpress Analytics link as follows -
    - Go to Wordpress | Analytics
    -
    - At the bottom right of the first box click on Source: AnalyticsThis opens Google Analytics in a new window.
    -
    - Top right put in your client custom advertising dates - untick the compare to box if it's showing
    -
    - In the left menu you will get stats from the Reports | Acquisition and Engagement tabs
    - Also you'll get external click data under the Explore tab
    - You can put in the search box enter something significant from the url you are searching | Enter. This will bring up any url's with that term
    - Get analytics for client page - use the page name not url
    - When searching for analytics for a whole Section put the Section name in with a / at the end, eg Property would be "property/" or Sport and Recreation would be "sport-and-recreation/"
    - Get their page, categories, Section (for scrolling ads) hits, hits for Map page and any other pages they may appear on (eg Flavours, Community Features, etc).
    - Also get all site visitor and page view stats for the advertising term
    - Put all stats in your template
- Put in your template

Search Console

- Go back to Wordpress tab
    - Scroll down to search traffic box and click on Source: Search Console link in bottom left
    - At top put in your custom advertising dates
    - Search for client page
    - Then do the same searching for url's and/or query keywords, eg for a mortgage broker you may wish to generalise and search on urls containing "mortgage"
    - Note all stats in your template

Google Page Rankings

- Go to Google and get page rankings by typing in keywords in the search bar and noting position of Linku2 page. Copy the link into your template to add in your client report

Social Stats

- Gather any other stats eg Facebook post stats by
  - Going to the Facebook page | Insights | find the post and you will see Reach numbers. To see Impressions change the search option at the top of the Reach column
- Keep your document open to copy over stats to your email template

Client Reporting

- Once you have all your stats work on one report at a time and transpose stats into your new report and check on rankings listed and any others you'd like to add
- Save as a pdf
- Then go to the website media tab and upload your new report, make sure to copy the link url, if you have more than one report to upload do all these at once then open a new wordpress tab (as you'll want to copy each report url into your email report
- In the new tab, go to Contact CRM | Client contact | Emails
- Use template "CLIENT - RENEWAL Report Link Template"
- Change any necessary wording and add a link to the button to your pdf report
- Send
- Go to Contact Notes & Activities | Add New | Note | Add media and add a link to the stats document

Invoicing

This process may change depending on discussions with bookkeeper (may be sent auto on the 15th of each month - you will get a task on 16th of each month to ensure you've done all reports due between that date and 15th of next month).

If this process is done manually, after you have reported to the client leave for a few hours and -

- Go to Xero | Find repeat invoice
- Update and SEND with renewal email template (just check wording)
- Make sure it's sending from the correct template, correct Stripe link and added relevant tracking links
- Make sure they are in Client Xero contact group

Go to Hootsuite Social Media schedule add at least 1 x posts for their new term or 2 x for 12 month clients (they may also get other links depending on Features)

This client will now get any standard emails automatically and all you will need to do is to do the mid-term reports and renewal reports when your reminders come up in Google calendar.

If the client comes back and doesn't want to renew switch to your "**Closing Client Procedure**"

Client Mid-Term Report

You will use this same procedure for 6 and 12 month clients. For 6 month clients this will be once during their advertising term approx. 90 days after start date. For 12 month clients this will be twice after approx. 120 days and 250 days after start date.

You will be notified of activation of these by Google reminders.

Full details on what you need to gather and how to do this are below.

Allow approx. 30 mins to report. If you can gather stats from more than one client at a time this will help reduce reporting times.

Report stats to client for mid-term in Contact CRM

This report needs to be completed and sent manually. When your reminder comes up -

Create a word document and add the Renewal Client template content below -

Client Name:

- Start Date:
- End Date:
- Report Dates:

Google Analytics

- Sponsor/Deluxe Web page hits:
- Category page name:
- Category page hits:
- 2 categories or more page names:
- 2 categories or more page hits:
- TOTAL web page hits:
- Top level Section page hits (all category pages scrolling ad appears on):
- Top level Section page hits (if more than one Section):
- Total section hits:
- Quick Map Link page hits:
- Any extra page hits (eg Flavours, Community Features, etc):

Analytics External Links

- Client website links:
- Phone links:
- Email links:

Google Search Stats

- Client page -
- Total Impressions:
- Total clicks:
- Average CTR:
- Average position:
- Top level Category page/keyword 1
- Name -
- Total Impressions:
- Total clicks:
- Average CTR:
- Average position:
- Top level Category page/keyword 2
- Name -
- Total Impressions:
- Total clicks:
- Average CTR:
- Average position:

Repeat as necessary …

Google rankings

Go to Google and type in keywords for page rankings (add in links below to copy into client reporting template)

- Keyword 1 and position:
- Keyword 2 and position:
- Keyword 3 and position:
- Keyword 4 and position:

Social Media Stats

Facebook post stats (Reach, Impressions, Engagement):

How to gather stats

Analytics

- Gather and list their stats for the template from Wordpress Analytics link as follows -
    - Go to Wordpress | Analytics
    - At the bottom right of the first box click on Source: Analytics
    - This opens Google Analytics in a new window. Top right put in your client custom advertising dates - untick the compare to box
    - In the left menu to to Behavior | Site Content | All Pages
    - In the search box enter something significant from the url you are searching | Enter
    - This will bring up any url's with that term
    - Get analytics for client page

- When searching for analytics for a whole Section put the Section name in with a / at the end, eg Property would be "property/" or Sport and Recreation would be "sport-and-recreation/"
- Get their page, categories, Section (for scrolling ads) hits, hits for Map page and any other pages they may appear on (eg Flavours, Community Features, etc). Also get all site visitor and page view stats for the advertising term
- Put all stats in your template
- Go to Behavior | Events | Top Events | Event Label
- Search on client name to get stats
- Put in your template

Search Console

- Go back to Wordpress tab
- Scroll down to search traffic box and click on Source: Search Console link in bottom left
- At top put in your custom advertising dates
- Search for client page
- Then do the same searching for url's and/or query keywords, eg for a mortgage broker you may wish to generalise and search on urls containing "mortgage"
- Note all stats in your template

Google Page Rankings

- Go to Google and get page rankings by typing in keywords in the search bar and noting position of Linku2 page. Copy the link into your template to add in your client report

Social Stats

- Gather any other stats eg Facebook post stats by Going to the Facebook page | Insights | find the post and you will see Reach numbers. To see Impressions change the search option at the top of the Reach column

Keep your document open to copy over stats to your email template

Client Reporting

- Go back to Wordpress | Contact CRM
    - Find your client contact
    - Emails | Send Email | Use Email Template
    - Select "CLIENT - Renewal" template | complete all fields
    - SEND

Go to Social Media schedule with at least 1 x new posts

Community Pages Uploads

Clients are paying listings. As Licensee for a Regional site, you must also be prepared to manage your free and community site pages.

Whilst these don't officially bring you any income, they are very beneficial to the site for 3 main reasons –

- They provide useful local information which helps both with local site use and SEO purposes
- You can request and often get good backlinks from the clubs and community groups you are promoting
- You can sell your Community Feature Plans to local businesses who will then feature their links on these pages

Indirectly these are some of the best things you can do for your website rankings and local use.

These pages include -

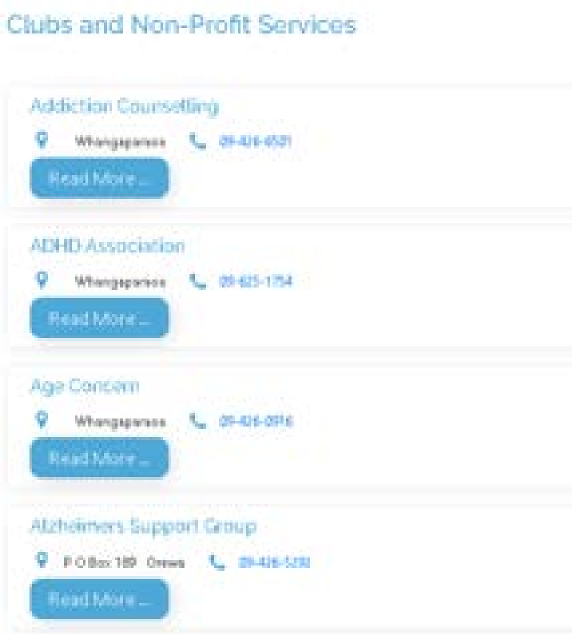
- Clubs and Non-profit groups
- Schools
- Churches and Religious Services
- Local Services (libraries, rubbish collection services, emergency services, Local Council/Board generic pages, bus timetables, etc)

Community Pages Upload Procedure

Community listings are very similar to paid and business listings. They are treated the same in the backend being listings under "Businesses" - Membership option is "Non-Profit" (see Businesses | Membership under Linku2 Regional sites WP Engine Management above).

In the frontend of the site most of these are found under the "Community" menu however some may be linked in other locations too.

Community listings all get a ***free*** onsite page. Listings on the page look as follows -



Full contact links are subsequently found in their read more link if these have been provided along with other information about the club/group/service.

The Read More community pages have the same appearance as Sponsor and Deluxe Listing pages.

Community Features

As well as Business Directory pages with 3 options of SMART Link Plans there are 4 other chargeable options with Linku2 Regional sites.

These are called Community Features and details are outlined in the SMART Feature Plans. These are -

- **Flavours Feature** - These features run for 3 months at a time and are focused around the hospitality industry. These run - Summer Sensations - December, January and February and Winter Warmers - June, July and August. Dining Sponsor and Deluxe clients are automatically included in this feature during their advertising term.
- **Community Features** - These are linked scrolling adverts at the top and side of community pages for clubs, schools, churches and local services (except Local Board pages). These pages are popularly viewed pages by the local public. Sponsor and Deluxe clients are entitled to a 10% discount if they take this as an additional Feature.
- **A Gift from Santa** - This is a special category activated in our Classifieds section. There are limited spots (usually 15, eg Our Linku2 15 days of Christmas to feature each business x 3 over social media over the period). These run from 10 November to 24 December.
- **Classifieds** - Self-loaded, needing approval, classified adverts online for 30 days

Flavours Feature

As mentioned these features run for 3 months at a time and are focused around the hospitality industry.

These run - Summer Sensations - December, January and February and Winter Warmers - June, July and August.

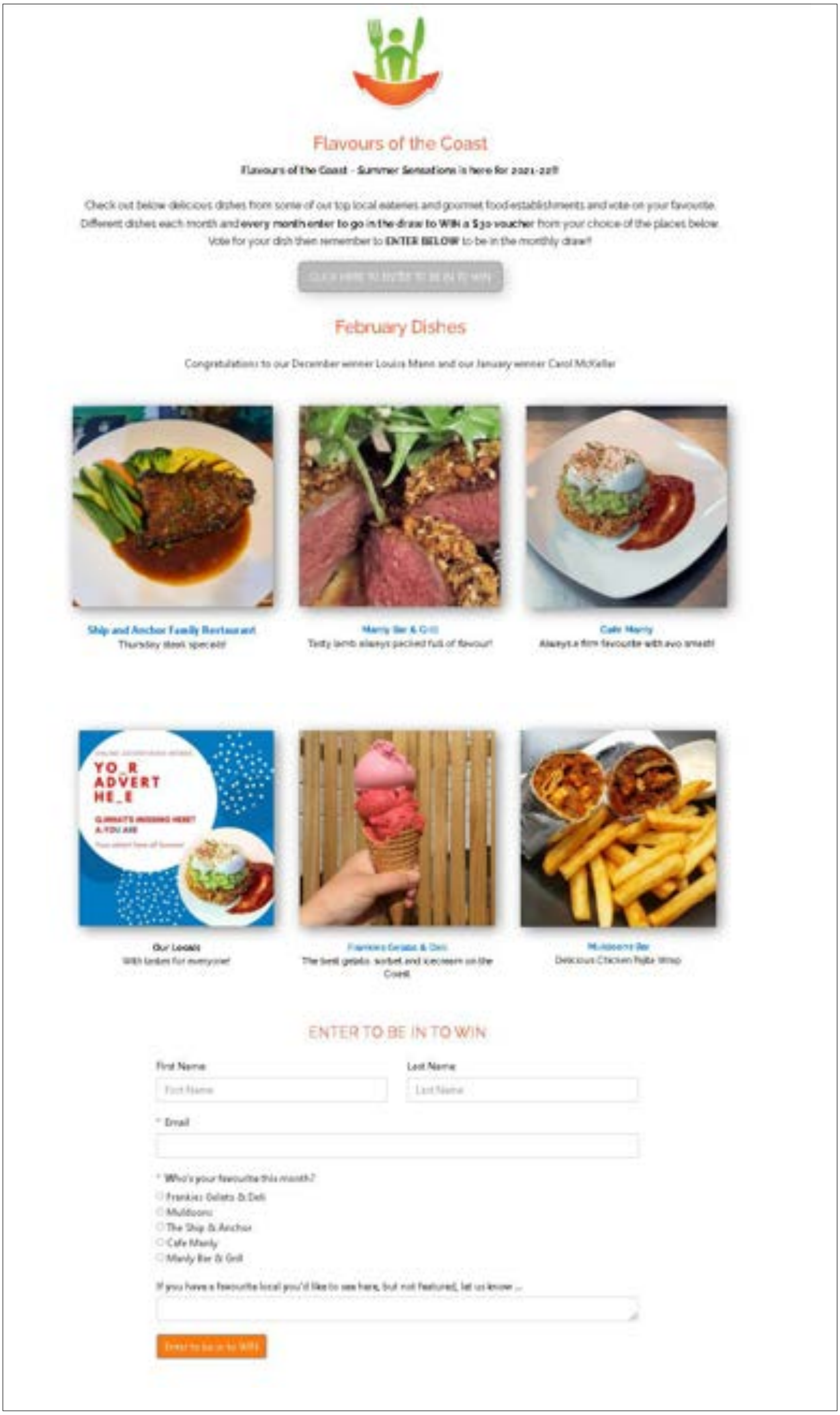
Each month a dish from participating businesses is featured with an image and description. Locals are encouraged through a social media and newsletter campaign to vote for their favourite. Each month a prize is drawn out for a voucher to one of the participating businesses - this is usually bought by Linku2 or you can see if you can get this sponsored in return for some promotion. It is usually in the region of $30. Winners are announced on social media and listed online.

The online form is another way to capture database contacts.

The online page is linked from -

- The home page
- A right column button on all business directory pages
- Linked directly through social media posts

An example of a Flavours page -



Flavours Feature Procedure

Notes: For activation of Automations start date of each Flavours Feature is -

15th November

16th May

Opening Procedure for Flavours

- When Flavours first task comes up create an excel spreadsheet which you'll use to record all stats and any other important information to collate a final report at the end
- Open Insightly and set up an Insightly Project | Add Contacts and Organisations for any current client who will automatically be in the Feature
- Set up specific Insightly tag for participants for this year, eg Flavours_Summer20, or Flavours_Winter21, etc (remember needs to be all one word so use underscore)
- Go and tag all current clients
- Check the Flavours page and tidy up (don't make this one live yet keep the Flavours button link to the stats page for now)
- Send "1st email - Advertising for Flavours" template to both Contacts and Leads (NOT to clients though who are automatically included)
- Schedule for 7 days later to send "2nd email - Advertising for Flavours" template 2 to Contacts and Leads - again remember not to send to clients)
- To current clients automatically included in the Feature send template "2 - Current Advertisers - Get dishes to us for start of Flavours"
- As dishes or advertisers come in use "Upload New Flavours Clients Procedure"

Upload New Flavours Clients Procedure

As you get instructions for a new advertiser go to -

- Insightly - change Lead to Contact | Add specific feature tag | Go to Project and add the Contact and Organisation
- Send email template "2 - New Advertiser what you need to provide"
- Set a task for 2-3 days later to follow up
- If getting images from website or FB go to their page and select 3 x images

Initial upload for all Flavours Clients Procedure

- Get 3 x images for clients from either them direct or from website or FB page
- Canva - resize images and save to a specific folder for this Feature
- Sort descriptions and place in a document ready to use
- Go to Fluent Forms Pro and duplicate Flavours Dish Entry | Rename (top left pencil icon) for new season and get form ID
- Go to Flavours page and go to structure - at the bottom go to Modal and change the form shortcode | SAVE
- Then add all images and descriptions | Go to each Superbox | Primary Image |Upload and replace image | For description go to Secondary | Heading

- Set up votes - do this by going to the shortcode box under the image you are using and changing the description in the Full shortcode box in the left column (you'll see if it is working as the votes go back to 1) - this doesn't delete stats for the previous button it just creates a new button in the LikeBtn plugin
- Go to Insightly and report to client with "Client first dish uploaded to check" template
- Then go to Canva - create 2-3 images to use for FB posts
- Go to Hootsuite and schedule in at least one post

On Start of Flavours Procedure

On 1st of 1st month (December or June) -

- Email both clients and Leads with "Flavours underway" emails
- Check Facebook scheduling and sharing schedule set up
- Post and share throughout the month noting in the sharing schedule

On monthly changeover of dishes

- Ask for dishes by templated email 7 days before - "Changeover of dish - asking for dish"
- On last day of month check stats
- Make sure you have images and descriptions ready for changeover if needed - image size 500 x 500 px

- On 1st of the month take snap dump images of the rows of dishes inc voting numbers (just to hold in case any queries)
- Go to Google Analytics | Get all relevant stats (page views, No of users)
- Go to two main FB pages | Insights -
- Top right of page - Export Data | Data Type (left column): Post data | Right column put in your dates and Layout: Post reach. Export Data.
- Open spreadsheet | Enable Editing | Save to the Flavours folder as an excel spreadsheet for that month
- Copy only Flavours posts and put in new sheet
- Do the same for all relevant FB pages then
- Save columns only Post ID | Permalink | Post Message | Posted | Lifetime Post Total Impressions | Lifetime Post Total Reach | Lifetime Engaged Users
- Add up totals of Flavours posts - mark top 3 or so posts
- Add figures to Stat spreadshee
- Then go to Flavours page and change all images and descriptions | Go to each Superbox | Primary Image |Upload and replace image | For description go to Secondary | Heading
- Reset votes - do this just by changing the description in the Full shortcode box in the left column (you'll see if it is working as the votes go back to 1) – SAVE but leave page open

- Go to Fluent Forms Pro | Flavours Dish Entry Form | Entries | Export as Excel and open (Enable Editing)

- Go to Google | Random Number Generator and only enter the No rows which were entries dated for the particular month
- Highlight the winner and note
- Then make sure all stat info for the month is in the spreadsheet and
- Go to Flavours page and add winners name at the top
- Close Flavours page and
- Open page for Flavours stats
- Add your winner at top and add all stats in relevant month
- SAVE
- save your excel spreadsheet
- Go to Project Manager | Projects | holiday project and save your excel spreadsheet into files

- Then go to FluentCRM | Contacts
- Find the prize winner in "Users" and email with template "Flavours – Congratulations to Monthly Winner"
- Back to FluentCRM | Go to your Flavours contacts for that season (use your season tag) | Email with template "5 - Changeover of dish done to clients start of the month"
- Then go to Leads | Dining tag
- Check none of your client's you've just emailed are duplicates - if so sort records immediately
- Email with template "6 - Changeover of dish to non-clients"

- Then go to Canva - create 2-3 images to use for FB posts
- Go to Hootsuite and schedule in at least one post

Closure of Flavours Feature

- On 1st of the month take snap dump images of the rows of dishes inc voting numbers
- Create (or duplicate a previous) Soliloquy slider using the template from previous Flavours ones | add images | Copy shortcode
- Go to Flavours Stat page and add slider
- Go to Google Analytics | Get all relevant stats | add up votes etc and enter at top of page in monthly stat column
- Go to two main FB pages | Insights -
- Top right of page - Export Data | Data Type (left column): Post data | Right column put in your dates and Layout: Post reach. Export Data.
- Open spreadsheet | Enable Editing | Save to the Flavours folder as an excel spreadsheet
- Save columns Post ID | Permalink | Post Message | Posted | Lifetime Post Total Impressions | Lifetime Post Total Reach | Lifetime Engaged Users
- Then create a new first column and mark all flavours posts with F - sort
- Add up totals of Flavours posts - mark top 3 or so posts
- Add figures to Stat spreadsheet
- On the Flavours page just put at top - "now closed look out for our next feature and dates" - you'll be disabling the link but the page will probably still come up in Google searches - you

can leave the current dishes as they are and maybe a link to stats page for end of that Feature

- Go to Fluent Forms Pro | Flavours Dish Entry Form | Entries | Export as Excel and open (Enable Editing)
- Go to Google | Random Number Generator and only enter the entries dated for the particular month
- Highlight the winner and email using Gmail template “Flavours monthly winner” (not Insightly as you don’t want users in the Insightly database)
- Then save your excel spreadsheet also as a CSV but first
- Insert up to 3 x blank columns (for 2 names but sometimes people list 3) - if you don’t you’ll lose your emails from the adjoining column | Highlight the cells you want to split | Go to Data menu, select Text to Columns | Select Delimited, Next | Pick what separates the words (probably a space) | Check the Data Preview screen, Next, Finish (if it says there’s already data it’s probably fine but check which column it refers to
- Delete any excess columns
- Add headings for First Name | Last Name
- The delete all other columns except Email so you just have the 3 columns and SAVE as CSV with a name something like “July Mailchimp Import”
- Login to Mailchimp (sarah@linku2.co.nz email) | Audience | All Contacts | Add Contacts | Import Contacts | Upload file | Select file | Continue to Organize | audience to select will be Linku2 Hibiscus Coast Users | Status: Subscribed | tick “Update any existing contacts” | Continue to Tag | select Hibiscus Coast all | Match | Import
- While still in Mailchimp go and add a note about Flavours in monthly newsletter

- Then go to Insightly | Login
- Go to your Flavours contacts | Email with template “7 - Closed - Flavours Feature closed for season - clients”
- Then go to Leads | Dining tag
- Check none of your client’s you’ve just emailed are duplicates - if so sort records immediately
- Email with template “8 - Closed Flavours Feature closed for season - non-clients”

- Then go to Canva - create 2-3 images to use for FB posts around closure
- Go to Hootsuite and schedule in at least one post

Flavours Activity Sets and Pipelines in Insightly

For full details on tasks and task content see Linku2 Manual - Insightly. For dates to set and which should follow as you set the Activity sets see below images.

Flavours dates -

Flavours Marketing -

- Task 1 - Set up Flavours - 15 November or 16 May
- Task 2 - Client Upload - 15 November or 16 May
- Task 3 - Send second and client emails - + 7 days - 22 November or 23 May
- Task 4 - Setting up new Flavours clients - + 7 days - 22 November or 23 May
- Task 5 - Report to current clients - + 9 days - 24 November or 25 May
- Task 6 - MOVE PIPELINE - + 15 days - 30 November or 31 May

Flavours Promotion -

- Task 1 - Check FB scheduling and report underway - + 16 days - 1 December or 1 June
- Task 2 - Check Flavours scheduling and sharing - + 23 days - 8 December or 8 June
- Task 3 - Check Flavours scheduling and sharing - +30 days - 15 December or 15 June
- Task 4 - Flavours first month dish changes - Get Ready - + 40 days - 25 December or 25 June
- Task 5 - Flavours dish changes and report - +46 days - 31 December or 1 July
- Task 6 - Check Flavours scheduling and sharing - +53 days - 7 January or 8 July
- Task 7 - Check Flavours Facebook sharing and scheduling - + 61 days - 15 January or 16 July
- Task 8 - Flavours 2nd month dish changes - Get Ready - +71 days - 25 January or 26 July
- Task 9 - Flavours dish changes and report - + 78 days - 1 February or 2 August
- Task 10 - Check Flavours Facebook sharing and scheduling - + 88 days - 11 February or 12 August
- Task 11 - Check Flavours Facebook sharing and scheduling - + 95 days - 18 February or 19 August
- Task 12 - Final Flavours push - + 102 days - 25 February or 26 August
- Task 13 - Flavours Closing Procedure - + 109 days - 3 March or 2 September
- Task 14 - RESET PROJECT AND PIPELINE

A Gift from Santa Feature

A Gift from Santa is a special Feature which runs once a year from 10 November to 24 December designed to promote local business Christmas present ideas or events/activities (eg can be gifts but could also be something like Santa in store, or Christmas show, etc)

This is a special category activated in our Classifieds section. There are limited spots (up to 15 max).

Our Linku2 15 days of Christmas then feature each business with 2 social posts over the period as well as links in our database newsletters.

First postings run from 10-24 November with one client featured a day.

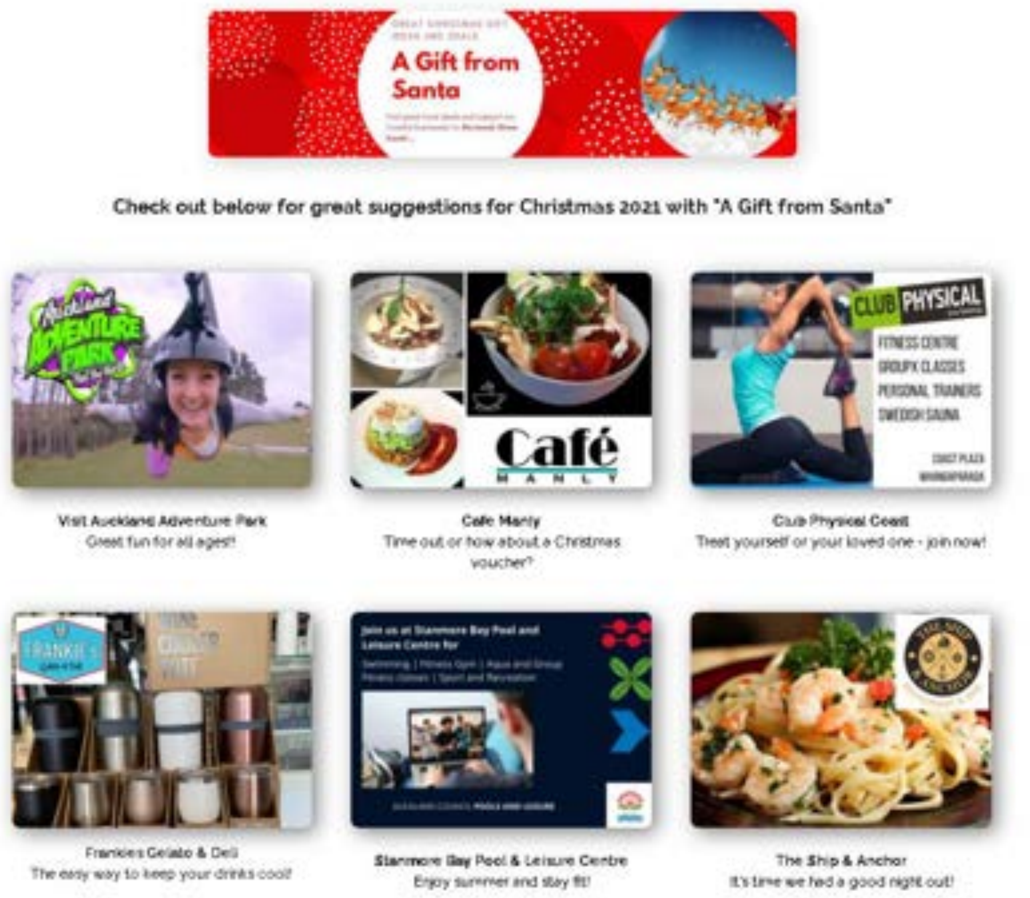
The second social posts run from 30 November to 14 December again one a day. All posts are regularly shared across social groups up to the end of the promotion period (5 pm on 24 December)

This would mean you could run a social media post - “A Gift from Santa: Idea No 1 ….”, “A Gift from Santa: Idea No 2 …” etc. Each advert sold as it signs up can then be attributed a social media post such as -

- 10 Nov - Idea No 1
- 11 Nov - Idea No 2
- 12 Nov - Idea No 3

Through to 24 Nov then start again with Idea No 1 from 30 Nov through to 14 December.

Each image is linked and hover over for a description of the gift. A Gift from Santa sample page -



Northern Arena
Award winning destination for your health!

Muldoons Restaurant and Bar
Great atmosphere for a summer evening!

Orewa Beach
Your perfect beach destination!

Queens Beauty
15% off microblading and microneedling

A Gift from Santa Procedure

When Insightly Task comes up to start -

- Check all Insightly Contacts and Leads have the generic tag for initial contact (eg gift_from_santa / flavours (with no dates) to send out the initial emails
- Set up a spreadsheet for this particular Project - you'll use this to record all stats and other important info (eg if there's a prize draw then entries, winners, etc) - also you'll use this to collate a final report at the end
- Set up and Insightly Project just for this particular Feature
- Set up an Insightly tag for participants just for this Feature
- Set up your initial emails as follows -

o First to relevant Feature clients and past participant Leads (eg those who have advertised in this Feature before)

o Schedule for 24 hours later to all other Leads

- Then for 24 hours after second email schedule in a FB post to all local businesses and schedule in a newsletter to local business contacts
- Check the Activity Set has a Task set for 7 days later for follow ups

In the meantime, as each advertiser responds -

- Change spot allocated in on site Feature page to a booked spot image with the client name listed

- Check if they are an Insightly Lead or Contact - if a Contact just add in specific project tag and note Feature. If a Lead convert to a Contact with relevant advertising dates and add the specific project tag
- Add Client tag in Insightly
- Add a link to the Contact in the Project
- Add new contact details into project spreadsheet
- Create an advert in Canva (if doing design) - 500 px wide x 350 px high
- Send to client for approval and check and to get their description if specific
- Note to follow up in say 3 days

Once got client approval -

- Replace the booked image on site with their new image and description
- Schedule a minimum 1st post into Hootsuite
- Add an Insightly Task for 10 days after Feature start date to check on track with their promotions

Closure of Santa Feature

- Go to Google Analytics | Get all relevant stats
- Go to two main FB pages | Insights -
    - Top right of page - Export Data | Data Type (left column): Post data | Right column put in your dates and Layout: Post reach. Export Data.
    - Open spreadsheet | Enable Editing | Save to the Santa folder as an excel spreadsheet
    - Save columns Post ID | Permalink | Post Message | Posted | Lifetime Post Total Impressions | Lifetime Post Total Reach | Lifetime Engaged Users
    - Then create a new first column and mark all Santa posts with S - sort
    - Add up totals of Santa posts - mark top 3 or so posts
    - Add figures to Stat spreadsheet
- On the Santa page just put at top - “now closed look out for our next feature and dates” - you’ll be disabling the link but the page will probably still come up in Google searches - you can leave the current adverts as they are and maybe a link to stats page for end of that Feature

- Then go to Insightly | Login
- Go to your Santa contacts | Email with relevant template
- Then go to Leads | Gift from Santa tag

- Check none of your client’s you’ve just emailed are duplicates - if so sort records immediately
- Email with relevant lead closing template

- Then go to Canva - create 2-3 images to use for FB posts around closure
- Go to Hootsuite and schedule in at least one post

Gift from Santa Activity Sets and Pipelines in Insightly

Santa Feature start date is 25 October

Santa - Premarketing and Marketing

Task 1 - Set up site page and get ready for pre-marketing - +0 days - 25 October

Task 2 - Check 1st email gone out - +1 day - 26 October

Task 3 - Check 2nd email gone out - +2 days - 27 October

Task 4 - Set up social media promotion - +3 days - 28 October

Task 5 - Once got client advertiser advert approval - +5 days - 30 October

Task 6 - CHANGE PIPELINE STAGE - +6 days - 31 October

Follow Up Marketing

Task 1 - First follow up to clients / contacts and Leads - +7 days - 1 November

Task 2 - Telephone or visit potential clients (need flyer) - +10 days - 4 November

Task 3 - Final follow up to all contacts and leads - +14 days - 8 November

Feature Promotion

Task 1 - Finalise all client set ups - +15 days - 9 November

Task 2 - Set up newsletter - + 15 days - 9 November

Task 3 - Get promo underway - +16 days - 10 November

Task 4 - Make sure all clients invoiced - +17 days - 11 November

Task 5 - Schedule posts - +19 days - 13 November

Task 6 - Schedule posts - +25 days - 19 November

Task 7 - Schedule posts - +30 days - 24 November

Task 8 - Mid-Feature report to clients and check post schedules - +36 days - 30 November

Task 9 - Schedule posts - +42 days - 6 December

Task 10 - Schedule posts - +49 days - 13 December

Task 11 - Schedule posts - +56 days - 20 December

Task 12 - Report Feature closing and full report after holidays - +60 days - 24 December

Task 13 - Late in day take off all links to Santa Feature - +60 days - 24 December

Task 14 - MOVE PIPELINE - +60 days - 24 December

Closing

Task 1 - Get all Feature Stats - +73 days - 6 January

Task 2 - Report Feature - +73 days - 6 January

Task 3 - Save details - +74 days - 7 January

Community Features

These are linked scrolling adverts at the top and side of community pages for clubs, schools, churches and local services (except Local Board pages). These pages are popularly viewed pages by the local public. Sponsor and Deluxe clients are entitled to a 10% discount if they take this as an additional Feature.

Classifieds

People Who Shape Our Community

Explanation

People Who Shape Our Community is another free service from Linku2 Regional sites.

These are blog posts which feature different members of the community and the work they do. These posts are good as -

- Items to share across social media and newsletter databases showing support for the community
- Keeps the Linku2 name in the community
- Offers opportunities to touch base with local groups

People Who Shape Our Community Features issue every quarter (4 times pa).

Procedure

The procedure is as follows -

- When your Google calendar reminder comes up send out a call out for candidates.
- Once you select someone to feature, and you may wish to have a number of people on a list you want to just approach directly, send out your standard email with form for them to

complete (content below). This will also ask for a couple of photos to feature in the blog post.

- Once received take the word document content and add to a new blog post -
    - Title will be: People Who Shape Our Community - First Last Name
    - Add in a photo (or two)
- In the fields below complete any required fields (this is only so the post saves as these are not relevant for blog posts) except for Business Type which determines which pages the post shows on site
- ***Do*** complete the SEO boxes at the bottom as these are important and relevant for Google SEO and also particularly the social when you are sharing the post
- In the right column under “Post” select -
    - Your author (this does show on the post)
    - Tick the category “People Who Shape Our Community”
    - Check in Business Types the top level “Community” is ticked
    - Add Feature image (note this is going to be wide and not tall so you may need to play around with your image sizing depending on the photos provided)
    - Under Discussion make sure both “Allow Comments” and “Allow pingbacks and trackbacks” are ticked
    - Update
- Go on site and check your blog post appears - it should be the top post in your People posts.
- Go to Contact CRM and report to the person who is featured with the template “People Who Shape Our Community report” - note you’ll need to add the link in to this report to the onsite article.
- Set up 2 x social posts one within 2-3 days and another around 6 weeks later
- Add a link and note in your next newsletter templates

Questionnaire

People Who Shape Our Community **template questionnaire** to send to featured locals (you may also wish to meet them in person to discuss this but it’s not essential) -

People Who Shape Our Community

Linku2 appreciate the contributions given by many by giving their time and/or expertise in helping shape our community into the great place it is.

We feature one person each quarter in February, May, August and November online through our Community section as well as through our social media channels and we would love to feature you in this if you will allow.

If you are happy to be featured, we would be very grateful if you could please answer the questions below for us to put together our one-page feature. Could you also please provide us with 1-2 photos (inc a head and shoulders if you have one) and at least one if possible, somehow related to why we are featuring you.

Thank you for your time and your contribution in helping “to shape our community”

1. **What is your name and the name of your organisation or project that we should use in this article?**

2. **Please give us a sentence or two about yourself and your background?**

3. **What is your organisation/project and what motivated you to start it?**

4. **What do you find most rewarding about what you do?**

5. **What do you find most challenging/frustrating with what you do?**

6. **How has your organisation/project developed and what would you like to see in the future?**

7. **What would you like us to see promote for you around your organisation/project?**

8. **Please give us any further information not provided above which is important to you and your project/organisation …**

Thank you for your time. We will forward a link to the blog article with your feature prior to promotion to the general public for your approval.

Best wishes and keep up the fabulous work you do for the local community

Your sign off

Event Calendar

Explanation

Our Events Calendar is one of our free services we offer to the local community. This is promoted to public through our social channels and newsletter links. The aim is for this to become the event hub for locals to use when they want to know what to do and where to go.

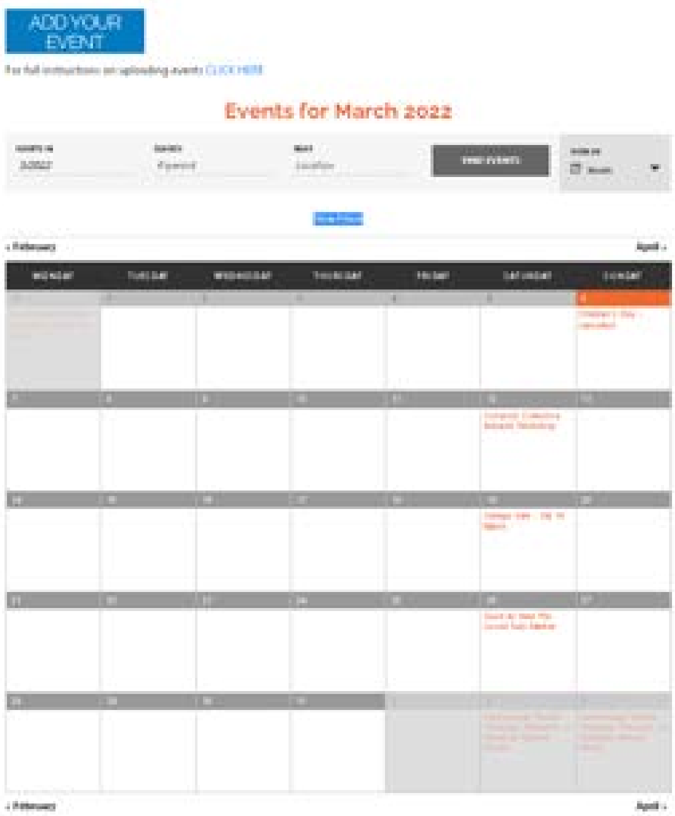
Members of the public can upload their own events (public events naturally) without having to login.

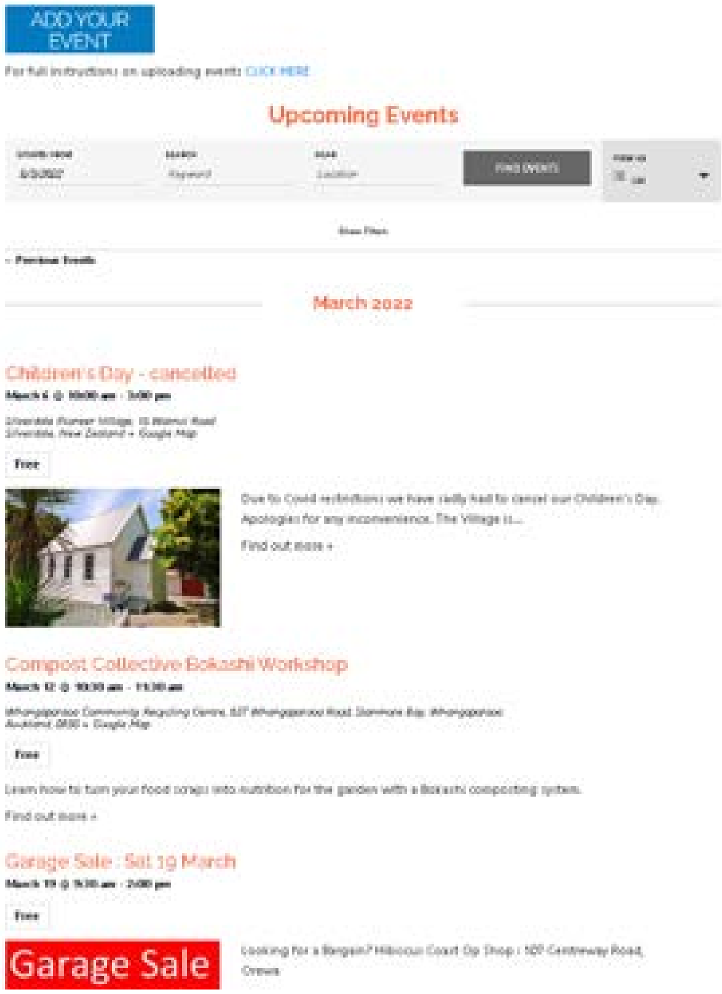
Procedure

At the top of the events calendar there is a "**Add Your Event**" button and a link for upload instructions. It is a fairly easy process. There is an add multiple events option which is useful but make sure event submitters don't add more than say 4 months' worth of repeat events at any one time (if the event is changed this is a pain to remove!!)

An email notice is then sent to the task admin for approval before the event is shown publicly on site.

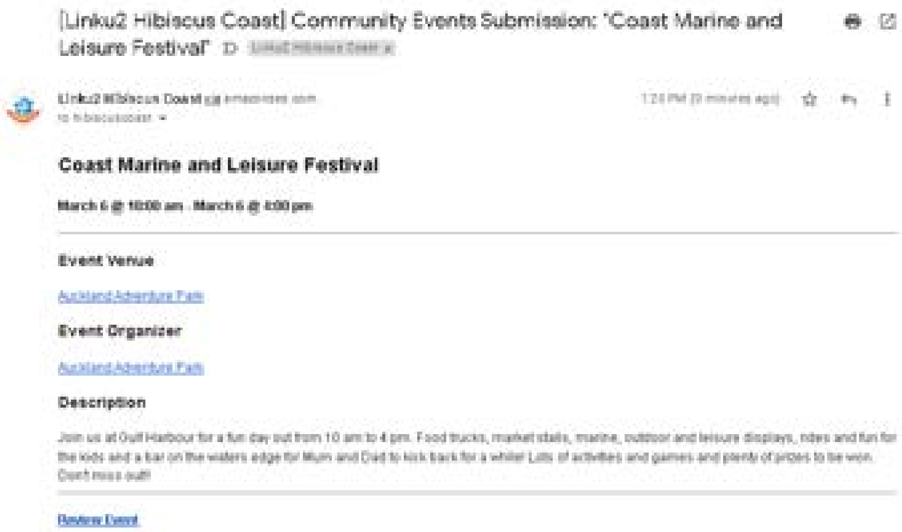
The onsite calendar on site can be viewed in a number of ways including as a list or by month. See examples below -





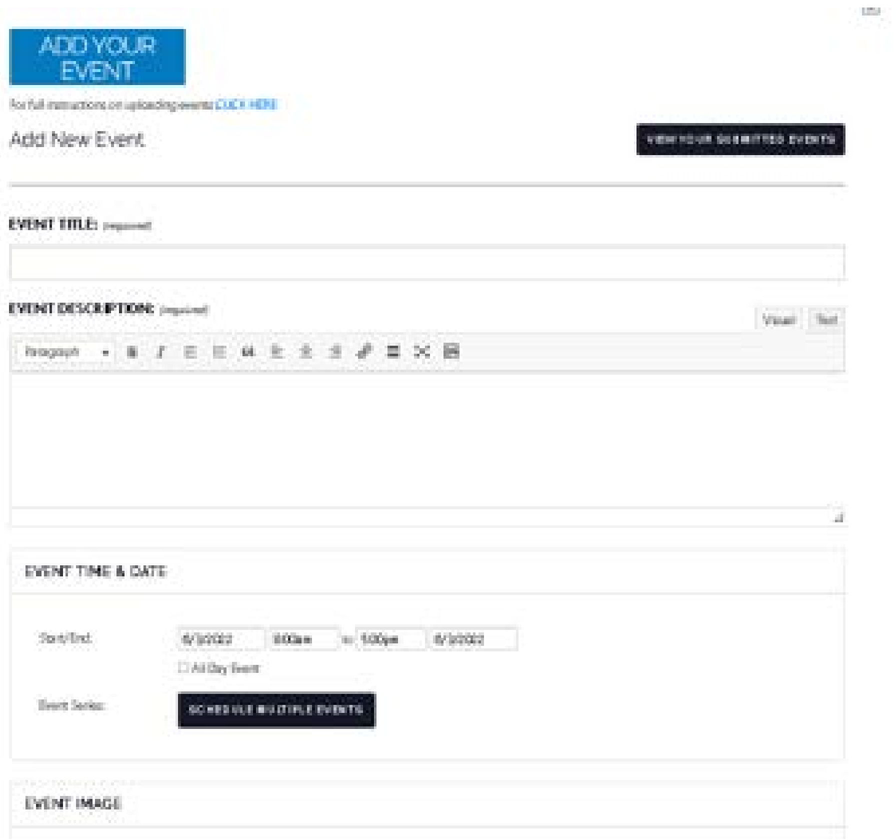
Any member of the public who click on the Add Your Event button will be taken to a form which is fairly self-explanatory. The person uploading can create new venues and organisers but can't add new categories or tags, however, they can request different ones to be created and added to the listing. These are used for searching.

Once a form has been submitted an email is sent to admin to "Review Event" and publish.



Admin can just click on the Review Event form to be taken to the backend to check, make any changes and publish (or not).

Online event upload form-



Recurring Events

When you get recurring events. If uploaded by a user from the front end you will get separate entries once you check the backend for publishing. The best thing to do for neatness and ease of use is to -

Go to the first event entry

Click on the date at the top

When the calendar shows you will see an option in bottom right for "multi-events"

Turn this on and include all events for the series

This will show all events online

You will then need to go to all the pending events in the backend | Tick them and trash them

There is an Automation set up in Contact CRM which sends a regular email to any contact with the "Event Organiser" tag just to remind them they can upload their events.

Reactivation of 6 monthly Automation

This Automation just needs reactivation every 6 months and admin are reminded to do this through a Google calendar event.

When your reminder comes up in your tasks calendar to update the Event reminders you need to -

- In Contact CRM | Create a new tag - “Event Reminders Sequence - month to month year”, eg Event Reminders Sequence - July to Dec 2022”
- Then open your Automation “Event Organiser Reminders”
- Open the first action | Remove the current select tag which is what triggers the Automation
- Add the new tag you just created | Save Settings
- Then go to contacts and filter by tags and filter the current tag that you just deleted from the Automation
- Add the new tag you created and added into the Automation for all the contacts
- This will now trigger the Automation which consequently triggers the Email Sequence which will send a reminder every 30 days for the next 6 months.
- Then go and make sure you set up a new Google calendar reminder which needs to be 180 days from today’s date to repeat this process in 6 months’ time. Make it 180 days as it triggers the first email to be sent immediately.

Nothing more now needs to be done for a further 6 months.

Latest Stats Monthly Updates

Explanation

Every month you will get a reminder to undertake several tasks. One of these is to update the site Latest Stats page.

This is a page found under the “Advertise” main menu tab which gives latest stats for the previous month. Used mostly for sales.

Procedure

To update -

- Open the backend Table | Latest Stats | Add data to start a new month
- Gather all stats and fill them in the Latest Stats table -
- Open a second screen
- Go to Wordpress | Analytics
- At the bottom right of the first box click on Source: Analytics
- This opens Google Analytics in a new window. Top right put in month dates - untick the compare to box | Apply
- Go to Audience | Overview tab
- Get and add in your table -
    - Sessions No for Visitors
    - Pageviews
- Take a screenshot of perhaps just the user stats (whatever looks best for the page)
- Go back to your Wordpress tab
- Scroll down to search traffic box and click on Source: Search Console link in bottom left
- At top put in your month dates - it should automatically show you stats for the whole site
- Note Impressions and clicks in your table

- Make sure (if good) you can see stat lines for both impressions and clicks
- Take a screenshot image
- In Paintshop blank out other not so good information | SAVE
- Check out search queries as you may want to specifically advise clients of some of these or use them for sales pitch
- Search emails (or get details from Support Office) for "Google Search Console Team" emails to check Google Search stats
- ***???*** Get Google My Business stats by searching on Google your business name this should tell you at the top the No of views this month, click on this number which will give you an overview | add in dates and scroll down to see No of views" (if these aren't good you don't have to add in public page)
- Gather any other stats eg Facebook post stats by -
  - Going to the Facebook page | Insights | Export Data
  - Page data | put in your date range | All page date | Export data
- Then in the spreadsheet you open add up all "Daily Total Reach" and "Daily Total Impressions" to get your stats and add in your table
- Check LinkedIn Connection numbers
- Go to Wordpress | Pages
- Open Latest Stats page
- Add in all new details and images | SAVE
- Check page is all updated

Newsletters

Explanation

There are a number of regular newsletters that are sent out as follows –

- Monthly business newsletters (which also go to clients, old clients, etc)

A Google calendar reminder comes up each month 3-4 days prior to the end of each month to get these business newsletters set up and schedule to go out 1st or 2nd of the month.

- Monthly site user newsletters

A Google calendar reminder comes up each month on 10th of the month to get these site user newsletters set up and schedule to go out 15th or 16th of the month.

Each newsletter there is a monthly winner. The business newsletter gives away a 6-month Deluxe listing and the site user newsletter gives away a $25 voucher to a Linku2 Regional client of their choice.

These winners need to be notified and there are templates in Contact CRM.

Procedure

Newsletters are campaigns in Contact CRM

There are templates you can use for each or you may wish to duplicate your last newsletter if perhaps there is an on-going Feature (say Flavours) and just update the rest

When your Google calendar reminder comes up you will have around 3 days to prepare your newsletter and you can schedule to send out.

Business Newsletter –

- Go to Contact CRM | Contacts
- Filter by all business Lists (eg Businesses | Clients)
- Export | Make sure you tick the custom field box for business name
- Open exported file
- Go to Google | Random Number Generator
- Get a number and match this up with a business in your exported database
- This will be your winner
- Contact CRM | Campaigns
- New template or duplicate last business newsletter
- Make your changes including adding in your winner
- Schedule your newsletter | Even if on the day it must go out schedule for at least 1 hour so you can email your winner
- Then go to your winner contact
- Email with template "NEWSLETTER - Business Monthly winner notification"

User Newsletter –

- Go to Contact CRM | Contacts
- Filter by User List
- Export
- Open exported file
- Go to Google | Random Number Generator
- Get a number and match this up with a site user in your exported database
- This will be your winner
- Contact CRM | Campaigns
- New template or duplicate last user newsletter
- Make your changes including adding in your winner
- Schedule your newsletter | Even if on the day it must go out schedule for at least 1 hour so you can email your winner
- Then go to your winner contact
- Email with template "NEWSLETTER - Site User Monthly winner notification"

The only other thing you need to ensure is that your monthly reminders for each newsletter type are added in your annual updates at the start of each year.

Election Pages

Regular Tasks

Weekly Tasks

Annual Tasks

Business (3-4 days before end of each month) and User (10th of month) monthly newsletter reminders to be scheduled in for the next 12 months

Business Directory Listing Annual Updates

Club/Non-Profit/Local Services Annual Updates

Generic Pages Annual Updates/Checks

Automations

First time business sign ups

Current Client 6 month procedure - 01 March clients (6)
Tag Applied

Current Client 12 month procedure
List Applied

Current Client 6 month procedure - Muldoons as 2 months late
List Applied

Event Organiser Reminders
Tag Applied

Current Client 6 month procedure
List Applied

Gift from Santa booking
New Form Submission (Fluent Forms)

Gift from Santa Feature
Tag Applied

Summer Flavours Annual Process
List Applied

Automation Activations
Tag Applied

Site User Monthly Newsletters - May to Oct
List Applied

Site User Monthly Newsletters - Nov to April
List Applied

Business and Client Monthly Newsletters - May to Oct
List Applied

Business and Client Monthly Newsletters - Nov to April
List Applied

Winter Flavours Annual Process
List Applied

Flavours bi-annual Process
List Applied

[Copy] Client Advertising Tasks
Tag Applied

Client Advertising Tasks
Tag Applied

New Free Business Listing
New Form Submission (Fluent Forms)

Monitoring of Site and Region/District Activities

The Licensee is the person who is responsible for the overall site and contractor management. This includes managing -

- Contractor workflows
- Contractor contracts, renewals, etc
- Site accounts
- Ensuring integrity of all activities around site management and usage
- Social media programme monitoring
- Image copyright compliance
- Safety of site records and access of users (for all roles)
- Gmail and Google account management

Each of these roles responsibilities include -

Contractor work flows

Contractors include all Regional Managers

Complete all actions for this task

Contractor contracts, renewals, etc

Complete all actions for this task

Site accounts

Complete all actions for this task

Ensuring integrity of all activities around site management and usage

Complete all actions for this task

Social media programme monitoring

Complete all actions for this task

Image copyright compliance

Complete all actions for this task

Safety of site records and access of users (for all roles)

Complete all actions for this task

Gmail and Google account management

Complete all actions for this task

Sales

Add in here all sales templates, links and procedures

WP Processes

Anchor links in Gutenberg

Page jumping, also sometimes referred to as anchor links, is where you click a link and instantly get moved somewhere further up or down a long page. To enable this, you put a HTML Anchor as Heading attribute in your page, and create a link that jumps to the anchor. You can jump to another page's anchor.

Put a HTML Anchor

Use the Plus Icon to add a new block.

Select Heading as the block type or start typing /heading as a shortcut to the heading block.

Enter your heading text. You may leave blank in heading text if you do not want to display any text.

On the right side under Block Settings, click on Advanced.

Type a word that will become your link into the HTML Anchor field.

HTML Anchor Syntax

HTML Anchor must be unique within a document.

HTML Anchor is case-sensitive.

HTML Anchor can include following symbols: hyphen(-), underscore(_), colon(:), period(.). It cannot include space.

HTML Anchor must start in the alphabet.

Link to your HTML Anchor

Type some text, or add an image or button that will become what you want your visitors to click on to go to another section.

Highlight the text, image or button, and select the link option from the block's toolbar.

Type in the HTML Anchor you created, starting with the pound (#) symbol. For example, if you created an Anchor named important-notice you would link to #important-notice.

Notice: The jump links will not work when you Preview your site. But you can test them once you Publish the site page.

Jumping to an anchor on another page

If you want to jump to another page's anchor, then specify URL with HTML Anchor. For example, example.com/anotherpage#important-notice

Creating a NEW Directory Category

There are four steps to creating a new directory category.

Create the Business Type (category)

Firstly you need to **create a new Business Type** (category) –

- Go to Businesses | Business Types
- Create and make sure you put in its Parent Business Type
- Also add in a description and complete the SEO boxes
- Copy your description to use in the next step when creating your page

Create the Category Page

The next step is to **create a page where the listings will sit** –

- Go to Pages
- Select a "similar" directory category page from the same section you are creating the new page for (eg if this is a category that will go in the property section then duplicate a property category page)
- Duplicate (this way you'll have the template already in the page)
- Search (on the duplicate page name) for your new draft page
- Open first in wordpress
- Change the name and paste in your description
- Also paste (listing your region keyword, eg Hibiscus Coast) in the meta boxes and social boxes at the bottom of the page
- Then change the target keywords – use the keywords on their own but also with your region keyword
- Add in a schema as follows –
    - Article (WebPage)
    - Advertiser Content Article
    - Headline will be your meta title including the region keyword
    - Description will be using all these keywords again and something like –
        - *"Business listings for tanks, water filters, water pumps, uv filters, water purifiers and coolers and water services servicing the Hibiscus Coast including Orewa, Whangaparaoa, Silverdale, Millwater and Milldale"*
    - The author will be the site name – eg Linku2 Hibiscus Coast
    - Select an image – you should have in your media an image specific to the directory section, eg property
    - Don't fill any other boxes in
- Publish | Publish
- Then go and open and "Edit with Oxygen"
- Go and open "Structure" (top right)
- Under section go to each listing type and open Query in left column | Filtering
- Keep the listing type (eg sponsor) and remove the old category and click in the box "Or in all of the following taxonomies" and start typing your category name so it pops up and add it

- Do this for all 5 of the listings
- Then “Apply Query Params” (bottom left)
- SAVE CHANGES
- Exit to WP Admin

Add site links to the new category

Then you need to add the links to the new category on the following pages –

- Your top level section page which has button links to each category
- Find the page | Open in Oxygen
- Find where it goes alphabetically
- In structure duplicate the button above and make the changes to text and link
- SAVE
- Then go to the top level business directory page (probably called something like “Business Home Page”)
- Add a linked listing in the acordian dropdown
- SAVE

Add businesses into the new category

Lastly see if you can find relevant businesses that should appear in the category –

- Open each business and tick the new category in the business types list
- SAVE

Then go and check your new page and links

Xero and Accounting

Add in here all Xero and accounting templates, links and procedures

Exporting and Importing new business listings

Weekly you should check forms and upload new business listings on site –

- Once a week go to Forms | Free and Paid Listings | Export as a CSV
- Remove ones you’ve already uploaded on site and remove any duplicates
- Then open your spreadsheet “Business Listings Upload Template” from your online Support manual
- Copy and paste over all yellow required fields and fill in those you don’t have in the submitted forms (mostly this will be for SEO)
- SAVE as a CSV
- Go to WP Engine | All Import
- Upload your CSV file

- Business | Map the fields
- Import
- Go and check each listing is uploaded
- Go to contact CRM and report with template
- Add new listings to Sales Funnel with a note for follow up after 1 month