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**NEW AND PREVIOUS CLIENT UPLOAD CHECKLIST**

When you set up a client, either new or previous, please ensure you complete all the following set up steps.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ACTION** | **CLIENT NAME** | **CLIENT NAME** | **CLIENT NAME** | **CLIENT NAME** | **CLIENT NAME** |
|  |  |  |  |  |  |
| Change the client CRM tag to client and remove from previous |  |  |  |  |  |
| Check this triggers the client automation |  |  |  |  |  |
| Do any logos (350x350) or ads/fbog in Canva (600x314 and 800x150) and a Facebook video image  |  |  |  |  |  |
| In WP | Business change tag to “client” |  |  |  |  |  |
| Do any page updates inc change membership and any social updates (get FB cache update) |  |  |  |  |  |
| Sliders: Add or activate for side ad | sponsor ad | giveaways page | School holiday dates page |  |  |  |  |  |
| Update the region blog post |  |  |  |  |  |
| Go to Google My Maps regional map – add clients to top then copy code and embed in Oxygen region template |  |  |  |  |  |
| Go to each FB region profile and do post linking to relevant region site page and pin to featured |  |  |  |  |  |
| Go to Analytics | Search Console |inspect URL |  |  |  |  |  |
| In holiday spreadsheet add client details |  |  |  |  |  |
| Open holiday sharing schedules |  |  |  |  |  |
| In Hootsuite create static post and video post (and 3rd if Summer) |  |  |  |  |  |
| Add details to sharing schedules and grey out if not yet active |  |  |  |  |  |
|  |  |  |  |  |  |
| **For North Shore and Hibiscus Coast clients ONLY** |  |  |  |  |  |
| Add pinned feature link to the NA blog post at the top of all owned FB groups (Orewa, Takapuna, Stanmore Bay, Gulf Harbour, Whangaparaoa, North Auckland |  |  |  |  |  |
| Add event for each holiday day on LU2HBC and LU2NS websites |  |  |  |  |  |
| Add links to the on-site events as featured pinned posts to the top of FB pages for LU2HBC, HBC community, LU2NS |  |  |  |  |  |
| Add Deluxe listings on Things to Do page and School Holiday Programmes page on LU2HBC and LU2NS |  |  |  |  |  |
| Add a link in North Auckland User automation newsletters |  |  |  |  |  |
| In Contact CRM send client report with CLIENT OPENING REPORT template |  |  |  |  |  |
| Create and send Xero invoice (or sort with bookkeeper as appropriate) |  |  |  |  |  |