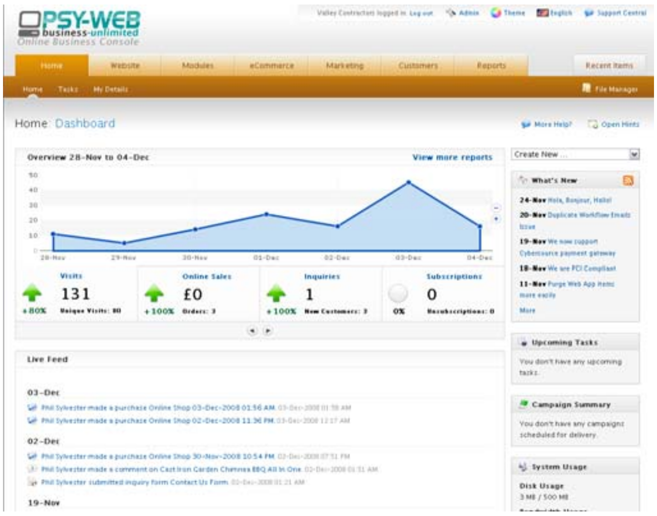
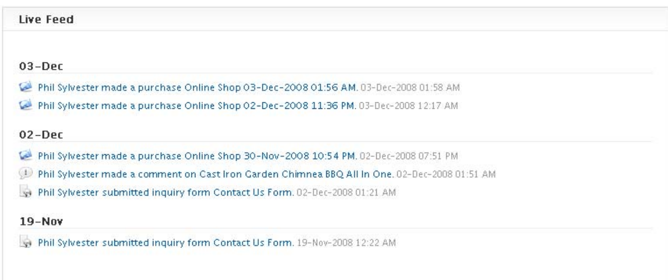
Business Console Dashboard

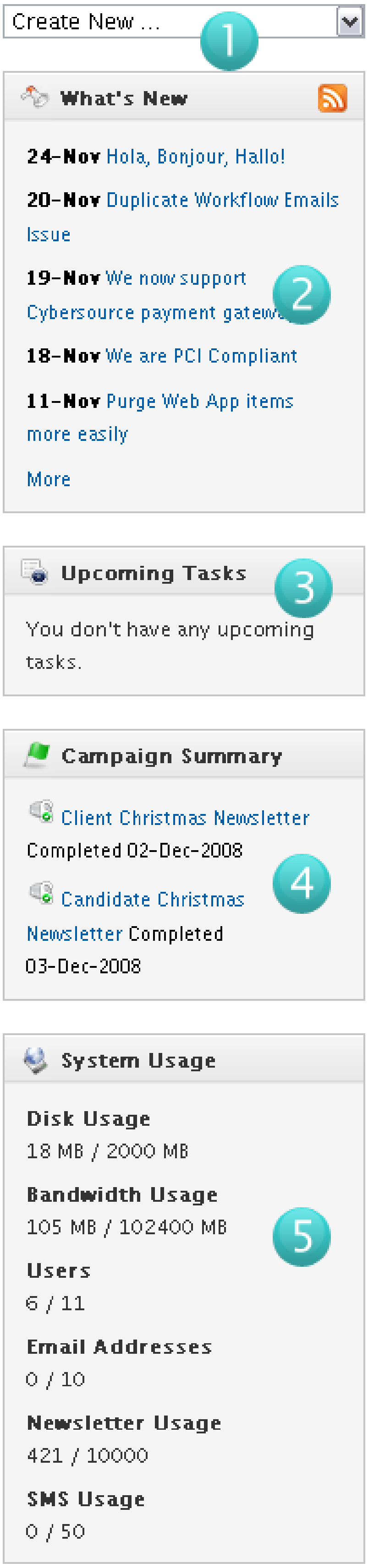
Every time you log in, the first thing you'll see is your dashboard.
Your dashboard gives you a set of key charts that give you a quick overview of exactly how your business is tracking. You can see your visitors, online sales, web enquiries and list subscriptions as below.



Click the arrow underneath the first set of graphs and you'll also see forum activity, bookings made, secure zone logins and affiliate referrals.

Below the graphs you can see your Live Feed. This is a live account of the interactions your customers are having with your online business. You'll be able to see everything from web form enquiries through to online orders, and even comments, subscriptions and more. This is an important part of your online business, and it's worth keeping an eye on!





The Dashboard Sidebar

1. Quick action drop down, which you can use to quickly create new items, like blog posts, web pages, products and campaigns.

2. Below that is the news panel. Keep an eye on this one for news and announcements about the system.

3. All the tasks that you've recorded in the contact management side of the system are listed under Upcoming Tasks.

4. The Campaign Summary gives you a quick overview of all the email marketing campaigns that are going out or scheduled to go out.

5. System Usage tells you how close you are to your allocated limits in terms of disk space, bandwidth usage, users and so on.

Finally, at the top of the screen you've got dynamic help in the blue box, in case you get stuck - so keep your eye on that.

Navigation

1. The *Website* tab is for managing your website.

2. *Modules* gives you access to content items that you can add to web pages.

3. Ecommerce gives you access to everything you need to manage your online shop.

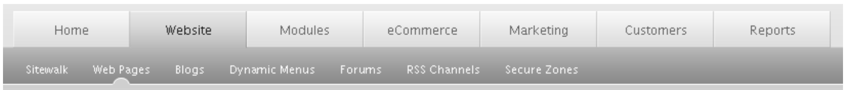
4. The *Marketing* tab gives you access to the system's email marketing capabilities.

5. Use the *Customers* tab to navigate through your integrated customer database, including your customer's web enquiries, known as cases, or their online shop orders.

6. The *Reporting* tab gives you a comprehensive view of all the key metrics you need to analyze and improve your online business.

Note –
Some of these menu items may not be available depending on your chosen Online Business Console package

Website Management



Managing your website with Sitewalk

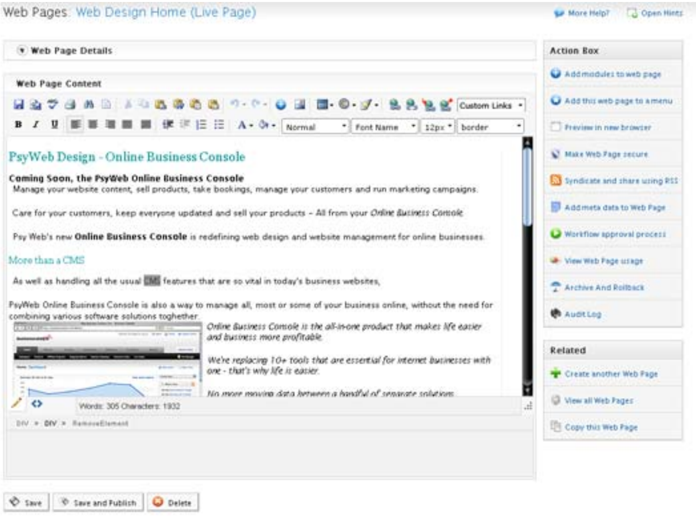
Sitewalk is a quick and easy way to navigate your site like your customers do, making changes as you go. Sitewalk is smart and will notice if you hover over a Website Module, and will then allow you to alter that module within the Sitewalk view

Although Sitewalk is able to make almost all changes to the content in your site, it is often best suited to changing small areas of text and images.

Managing Web Pages

To manage your web pages, go to *Web Pages* under *Website*, where you're shown a list of pages. Simply click on a web page to edit it.

Clicking on a web page in your Web Pages list takes you to the online HTML editor.



The HTML Editor

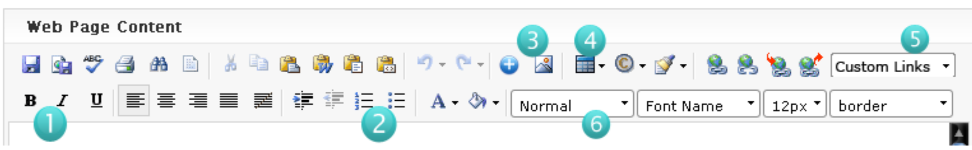
This is the actual live content of your web page and is available to be edited.

You may notice that the text and images inside the HTML Online Editor looks different and a lot simpler than the content on your web page. This is completely normal and is because the styling that your web page applies to the content is not present. The way your content looks inside the Editor is not representative of how it will appear on your site.

Using the HTML Editor is often a better way to add more intricate details to your site, especially if you are not getting the desired results from editing it Sitewalk, as any styling elements that may get in the way are no longer present. When you edit a webpage, you've got a word-processor-like editor to edit your pages.

With the editor you can:

1. Make text bold, italic or underlined.
2. Create bullet points or change indentation.
3. Add images.
4. Create a table.
5. Create links to other pages in your site
6. Change the type of text format you use



Tips for using the HTML Editor

- The HTML editor is mainly for content – Text and Images
- The web page does most of the styling!

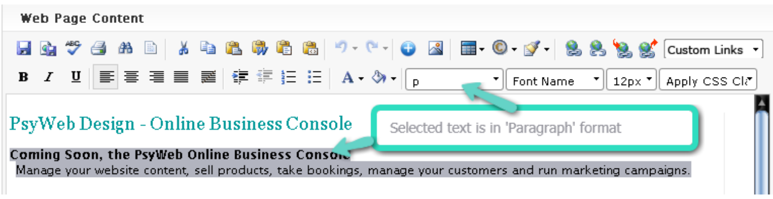
- The web page that wraps this content is designed specifically to do large amounts of the styling for you. This is so that everything on your site looks nice and remains constant.
- Paragraphs look the same site-wide with the same font and using the same colour.
- Headers are sized bigger than Paragraphs by default which splits your content up nicely for the user to digest easily.
- Unless you specifically need to change the way your content looks, it is best to leave the Font Name, Text Size and Colour Settings well alone, or your site will become difficult to read and will confuse visitors to your site – as well the browsers displaying it.

Nobody likes centred text!

Centred text is difficult to read and puts readers off actually reading the text. This is why you hardly ever see centred text in newspapers or magazines. Again, the website will usually decide for you which way the text is aligned.

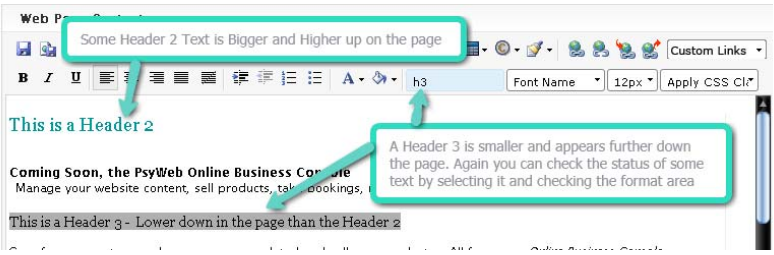
Header and Paragraphs

Text on your site is mainly in blocks of paragraph format (note – this is sometimes called ‘p’ or ‘Normal’ in the editor) You can see the current format of the text by selecting it in the editor and taking note of the status in the format selection box.



Headers are there to split up paragraphs and are numbered logically according to size and importance.

E.g. Some Header 2 text will be bigger than some Header 3 text, and will appear higher up in the page.



Having your Headers and Paragraphs in the right order will help your pages look better, and will help with general Search Engine Optimisation of your site.

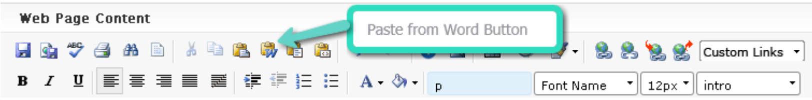
Important – Header 1 or h1 text should NOT be used in a web page – the reason being that a Header 1 should only be used once in every page and we often use Header 1 text to display as your logo and link to your homepage. Adding more Header 1 tags may cause certain Search Engines to classify your site as spam and not index it.

Copying and Pasting from Word

Microsoft Word contains its own styling code behind the scenes that is generally not accepted by most web browsers. Copying and Pasting content directly from a Word file into your HTML Editor can give unexpected results on your web page because of these hidden styling rules. Therefore, if you want to copy and paste from Word, you should do so in a slightly different way than you normally would.

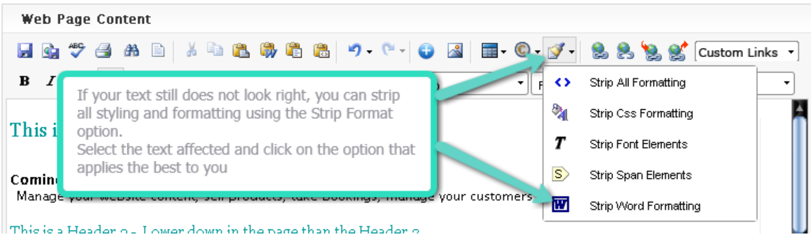
1. You should copy your text from Word as normal

2. In the HTML Editor, click the “Paste from Word” button in your Tool Panel.



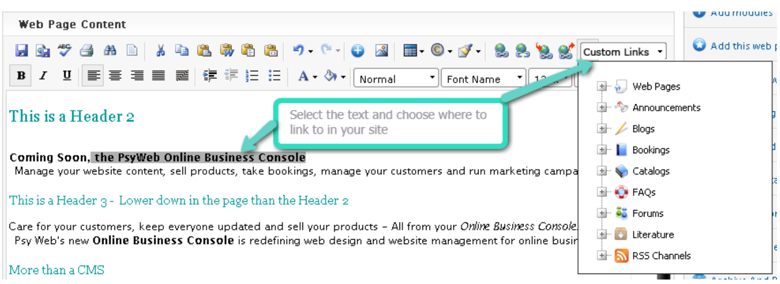
This will strip any of the code that Microsoft Word adds to your text and will paste it into your HTML Editor. It should now display correctly in your site.

If this hasn’t worked, or if you have made a mistake in formatting some of your text, you can strip all styling and formatting using the Strip Formatting button in the HTML Editor. Highlight your text and select the option that is best for your situation



Hyperlinks

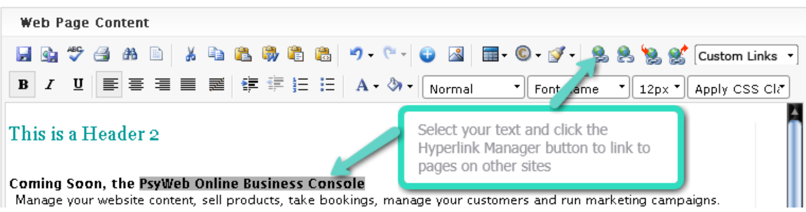
Hyperlinks allow you to link to other pages in your site. Using the ‘Custom Links’ selector in you HTML Editor Tool Panel allows you to link to pages, modules, blogs, catalogues and anything else contained within your site. To use this, simply highlight the text you want to act as a link in the Editor, then choose an option from the ‘Custom Links’ selection box.

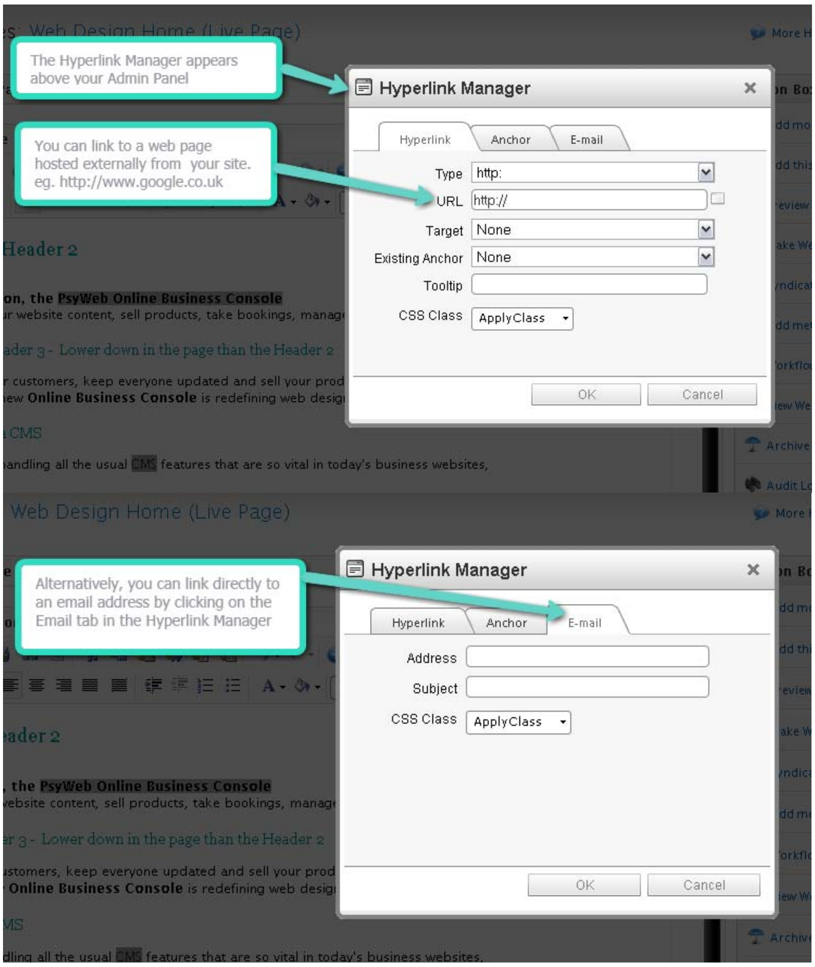


External Links and Email Addresses

You can also link to pages externally hosted on the internet, provided you have the web address. Also, it is possible to link directly to an email address, so that an email can be sent directly to the recipient from your webpage.

This can be achieved by using the Hyperlink Manager Button in your HTML Editor.





Blogs

Blogs or Weblogs are a powerful way to communicate with your customers in a more personal, one-on-one fashion. Adding a blog to your website is a great way to develop and grow your relationships with your customers online.

Posting to your Blog

A post is an entry on your blog. Posting to your blog is simple. Go to Website -> Blogs, click on the "Blog Posts" link. To create a new post:

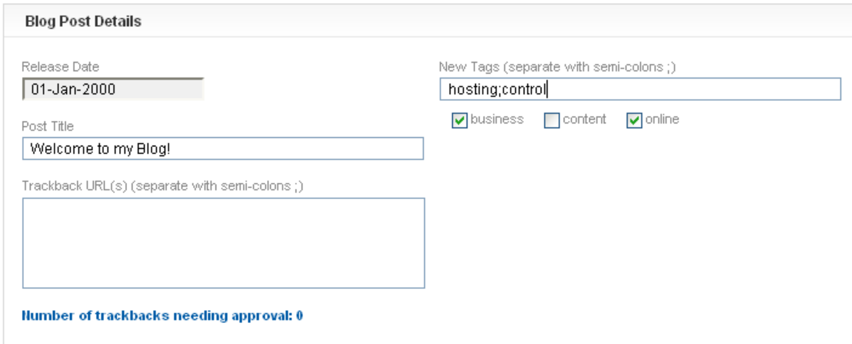
1. Click the **New Post** button
2. Give your post an engaging title
3. Pick a **release date**. The default is today, but you can set the date into the future if you want to schedule you post to go out later.
4. If you got inspiration from another blogger, copy the "Trackback" url for their post and put them in **Trackback URLs**, one per line (click on the "Show Advanced Options" link to see this field). Remember you should have a link inside your post to the blog you are trackbacking to, to show you are genuine and not spamming the other blogger!

5. Write the body text of your post.
6. Click **Save** and you're done! You'll see if the Trackbacks you've entered have succeeded or not.

At any time you can come back and click on the title of the post to load that post and edit/delete it.

Blog Tags

Tags are simply labels that people use to make it easier to find blog posts, photos and videos that are related. So, if you write a post about life and art you'd place these words into tags and people interested in arts can click on it to display the relevant articles. When writing your post you can select the tags that are relevant to your post from the list of checkboxes or you can enter the new tags (separated by semicolon ;) into the New Tags field.



Trackbacks and Comments

Trackbacks are a mechanism to automatically create a relationship between your post and another bloggers post via links. To complete a Trackback we need to "ping" the Trackback address or URL. The Trackback contains all the necessary information to the other Blog so that a link appears on the other blog, back to your blog. It's a great way to have a conversation with other bloggers.

You can allow Trackbacks by checking the checkbox in the "Details" tab.

Classifying Blogs

Some companies have several blogs about different things. Using classification, you can classify a blog primarily about product support under "Support", or a blog about marketing under "Marketing". To classify your blog, simply click on the **Classify this** blog in Action Box and select the classifications that apply to your blog.

When you publish your blog on a web page you can choose to publish all blogs within a Classification. By choosing the Support classification the system will automatically display all blogs within this classification on your web page. If in the future you create a new blog and also classify it in the Support classification, it will automatically appear on those web pages that have the other Support related blogs.

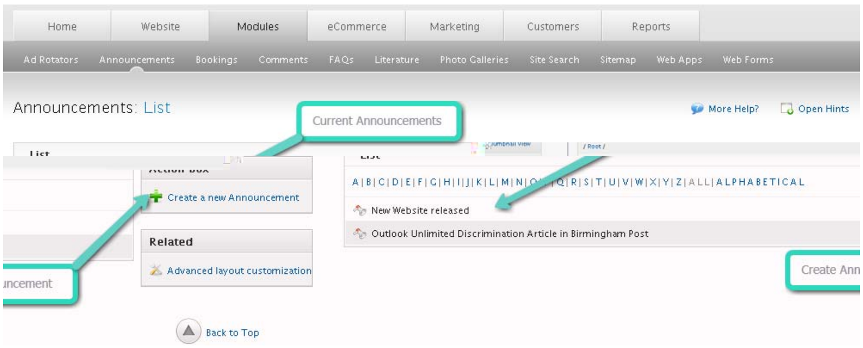
Most types of content can be classified. These include announcements, FAQs, literature and so on. This feature allows you to easily create a support area on your website and publish all support related Blogs, FAQs, announcements effortlessly in one central area.

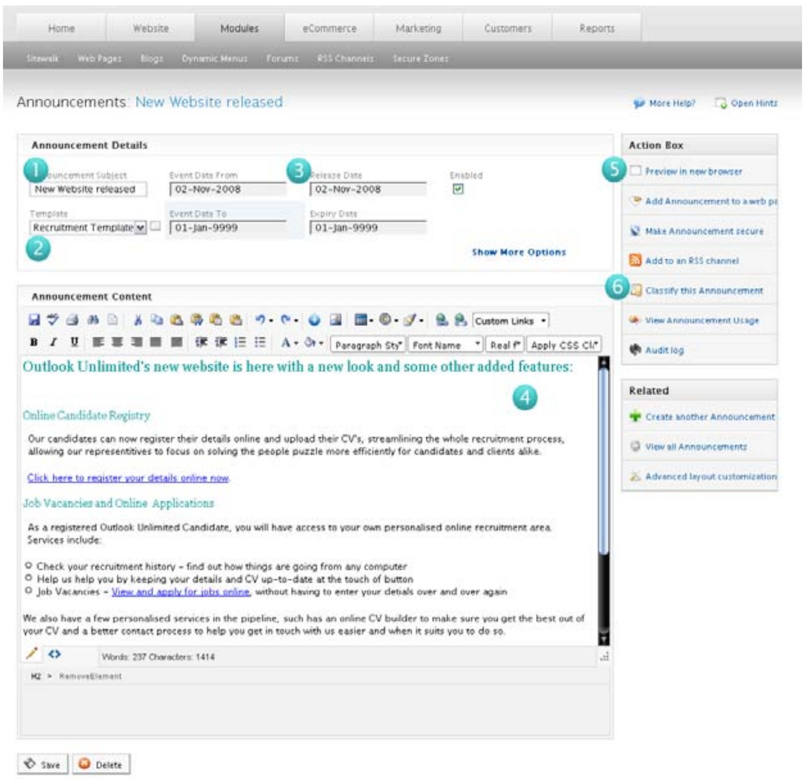
Modules – Announcements

Modules are controlled from within the Admin Panel or via Sitewalk.
The advantage of using modules is that, even if the module appears in every page in the site, you only have to alter the module once to have it affect the entire site.

You can quickly and easily publish Announcements, News Stories, Press Releases, Calendar Events or even Employment Advertisements using Announcements.
When announcements are created and added to your web page, your customers will see the announcement title and a release date on your site.

Announcements allow you to quickly and easily maintain a list of newsworthy events that helps you keep your site fresh and communicate important messages with your customers. When Announcements are viewed by a web site visitor, a record is made of the action. This means that you can now accurately track what events and news stories are being viewed, how often and so forth.





Adding or editing an Announcement contains the following steps:

1. Announcement Subject - this acts as a title for your item, and also provides a link to the announcement content in the website's list view.

2. Template Selection - this selects the template to use when a user views the full announcement content. This lets you keep your branding constant throughout your site.

3. Events, Release and Expiry dates- If your announcement is to happen on a certain date, you can specify so here.
   The event date lets customers know when the announcement event is scheduled for. This date will appear on the Announcement in your website.
   The Release and Expiry dates allow you set your Announcement to display only from one date to another, or to display at all times.

4. Announcement Content - this is the content that will be shown on the Announcement Full View (after a user clicks the link to view all)

5. Preview Announcement - you can preview you Announcement in a new window before making it live, to check how it looks.

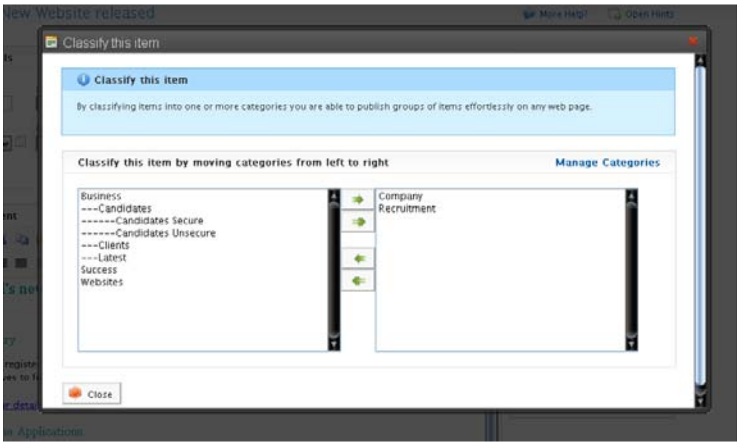
6. Classifying the Announcement - this option allows you to set a classification for your announcement to allow it to only be displayed in certain areas of the site.(see below for more information)

Classification of Announcements

Sometimes, you may want to display certain Announcements in specific areas of your site.

For instance, you may want an announcement about a new product to display on your online shop page, but not on your homepage. Your website classifications will have been set upon design of your site. (Ask us if this hasn't been set up)

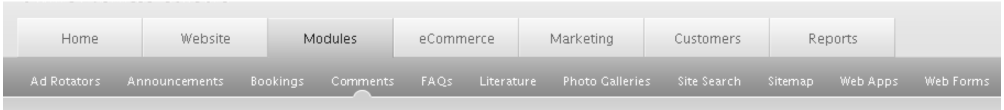
You can do this by classifying the Announcement.



You classify the item by moving the desired the desired category from left to right. Then, wherever set to do so, this announcement will only be shown in the correct areas of your site.
If you do not classify an announcement, it will be shown in all Announcement modules throughout your site by default.

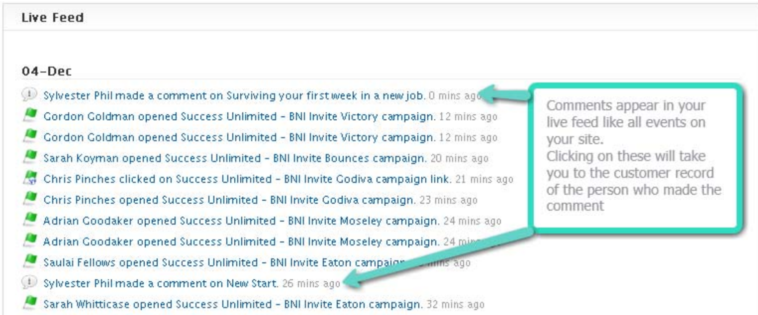
Modules – Comments

Comments enable you to create micro-communities around any type of content on your website. Comments encourage visitor participation on your website, creating an increased level of transparency and higher levels of credibility for your business. Comments also help towards creating a sense of community on your website.

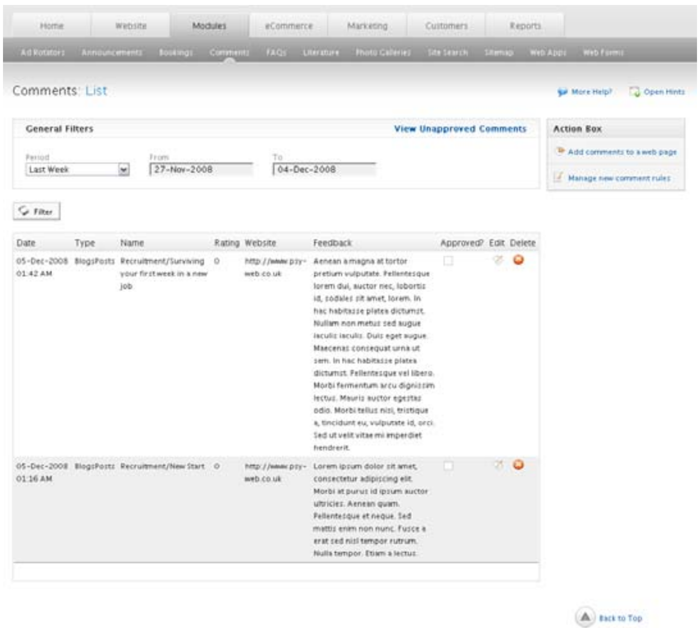


It’s likely that you’ve already seen similar Comments features implemented on most blogs. Accepting reader-input on ones blog entry is now more or less a standard. However with this system you can encourage user-input on any type of content and not just blog entries such as Web Pages, FAQs, Announcements, Web App Items, Products and more.

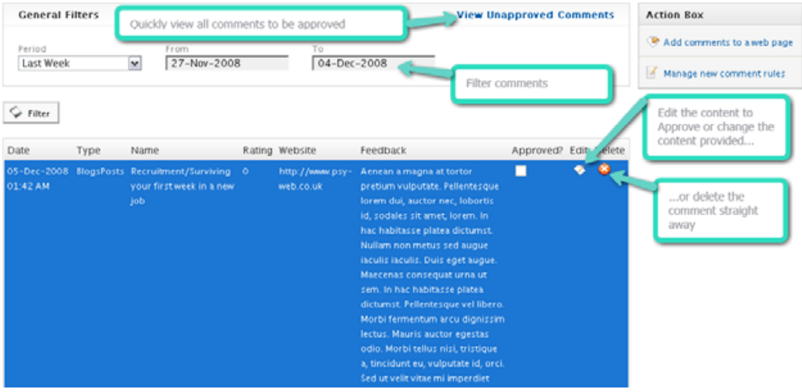
Comments made on your site are part of the Live Feed on your Dashboard Home Page.
You can also setup workflows to receive an email or text message when a user makes a comment on your site.



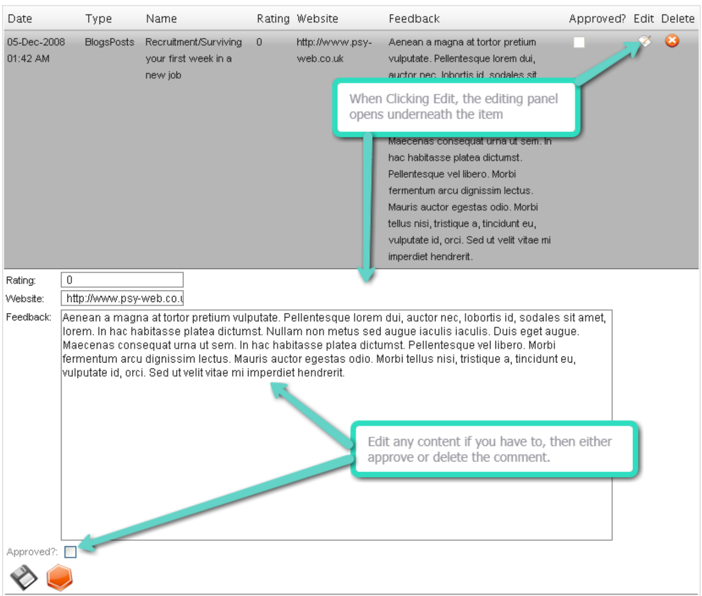
Approving, editing or deleting Comments



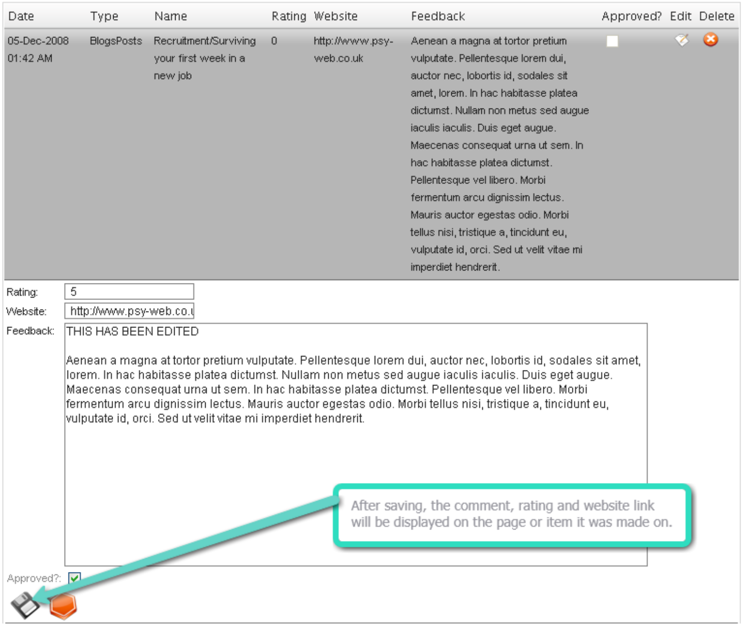
Comments do not get displayed on your site, unless specifically requested to do so (not recommended!!) until an Admin User has approved the content. From the Comments home page, you can view all current comments and choose to approve them, edit them or delete them.



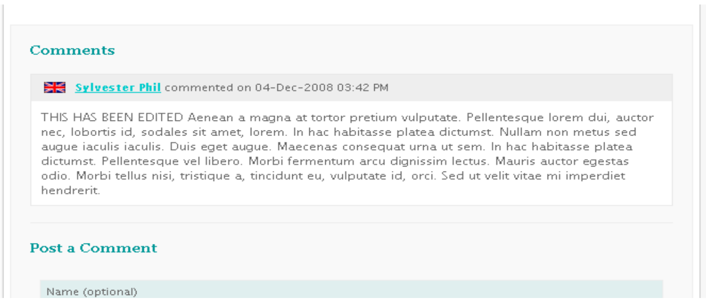
You can edit any content by clicking the Edit button on the corresponding comment.



Saving the item means that it will be displayed on the webpage, blog post, product or Announcement it was created under.



An approved comment being displayed on a Blog post:



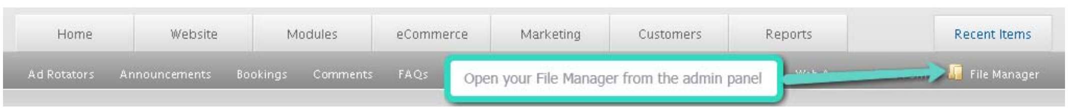
Modules – Photo Gallery

The Photo Gallery feature enables you to present any set of your images on your website so customers can easily navigate through and view them. The Photo Galleries feature is extremely easy to use and can be implemented on any web page with just a few clicks of the mouse.

It automatically generates thumbnails for every image in the set and allows visitors to navigate from one to another. You can optionally provide a description for each photo which is displayed when the user views the full size image.

Adding new images to your gallery

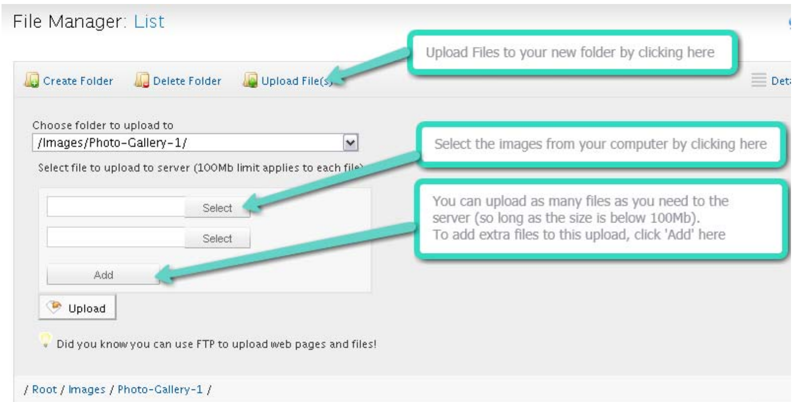
Select the images you want to appear in your gallery, you can then upload them to your site via the Admin Panel



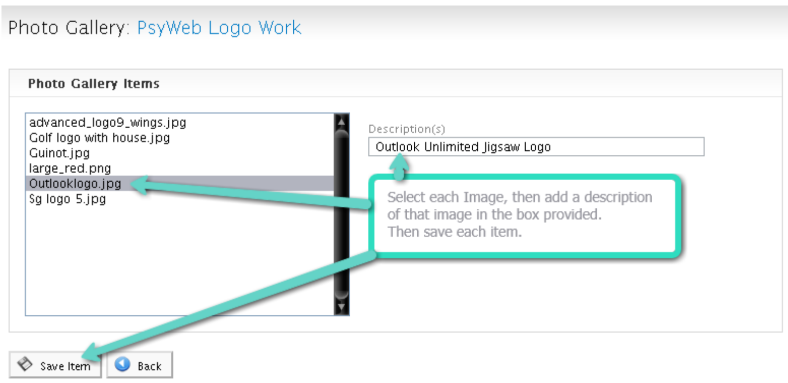
Upload Files with File Manager

Your File Manager allows you to keep track of Files on your web site, as well as uploading new ones. This is just like using folders and files on a Windows PC.

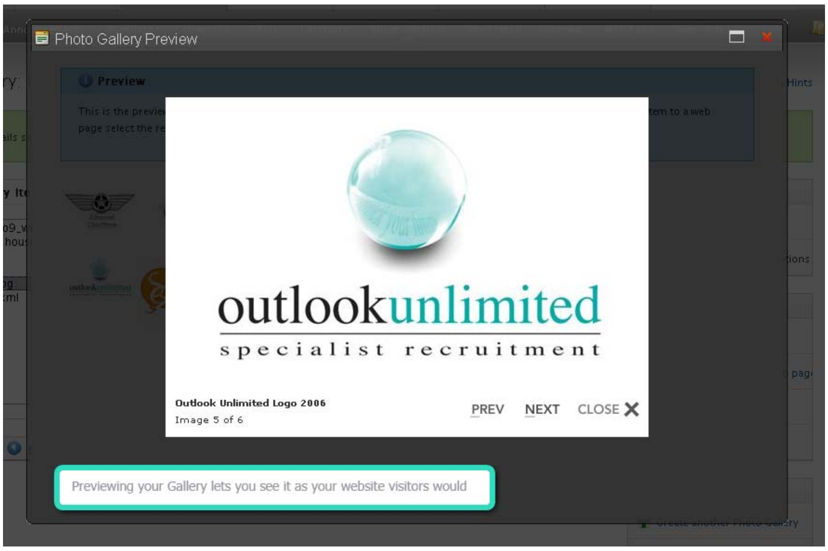
In the images folder you will find a folder called photo gallery, click to open this and you can now upload all the images you have on your computer. Choose to 'Upload Files' once inside your folder to begin uploading.



Once you have uploaded your images, you can go back to your photo gallery via Modules – Photo Gallery

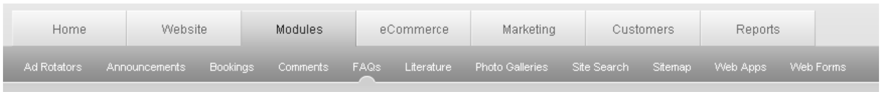


Here you can select each individual File and provide a description for each.
Save each item then click on Preview in the Action Box for a look at your Gallery.

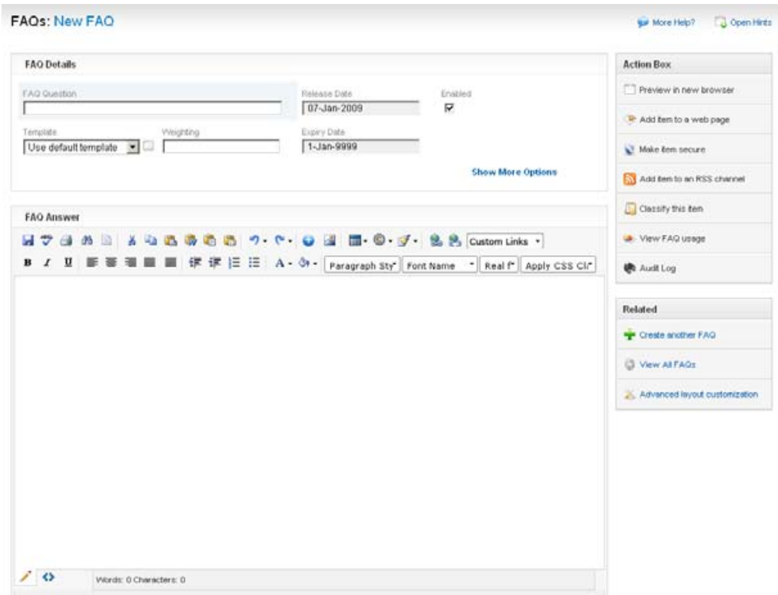


Modules – FAQ's

On the admin panel under modules you have the option to add FAQ's to your website



You will see in the right hand side action box an option to create new FAQ, this will open up the following page for you to complete



If you have different streams to your business and would like separate FAQ's for each sector then you will need to classify your FAQ's under the relevant section (Action Box – Classify this item)

Modules - Literature

You can set up and maintain a powerful Literature library and publish that Literature to your website. Customers see the filename and file type icon, with a link to download the file. Literature is a term used for any documents, files or even executable program files that can be placed on your website for download by your website visitors.

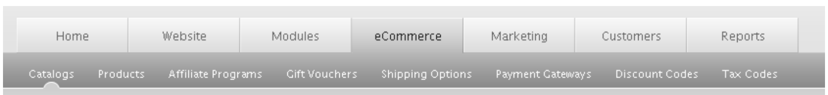
Once you have the document in the format that you would like to be uploaded, go to **Modules -> Literature**

Click **Create a new Literature item**

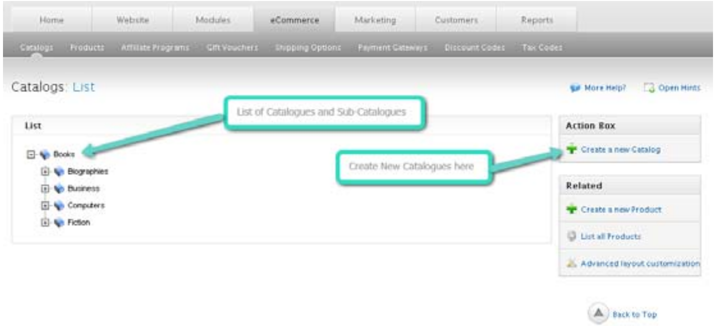
1. Enter Literature Details in the **Details** tab.
2. Click **Save**
3. Click **Upload Literature** to upload the file
4. **Classify this Literature** if it is required
5. **Add the Literature to a Secure Zone** if it is required.
6. Add the Literature to an **RSS Channel** if it is required. (**Syndicate and share using RSS**)

Managing Your Online Shop

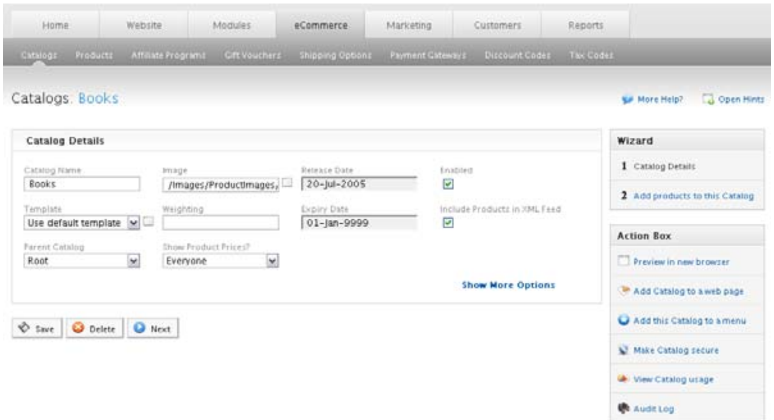
Your Shop is managed entirely from the Ecommerce tab in your Admin Panel



You manage your online shop by adding products to catalogues.
Catalogues not only help you group and manage your products, they are like special web pages that you can link to that run your online shop.
Note that when you click on a catalogue, you go straight to the catalogue view, which is a special page managed by the system, not a web page in the strict sense.

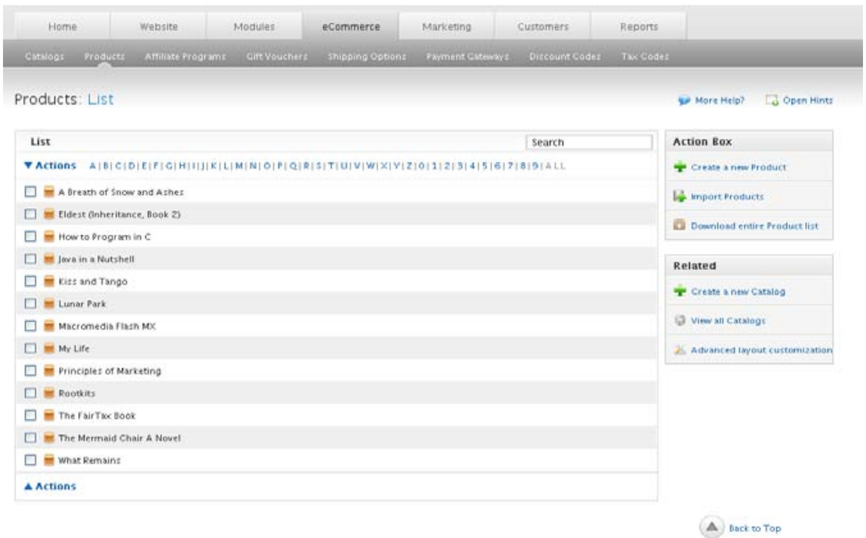


When editing or creating a catalogue you can choose a template to give a consistent look and feel for each catalogue. We normally provide a Special Template for your shop.



You can either add products from here in the Action Box or you can add products to catalogues from the product view.

Managing Products



Products are the items you actually sell online.

Adding or editing a product should contain the following steps:

1. Give your product a name
2. Add some images - small image for the thumbnail view, a large image for the detailed view.

3. You can make this an e-product and upload your product.

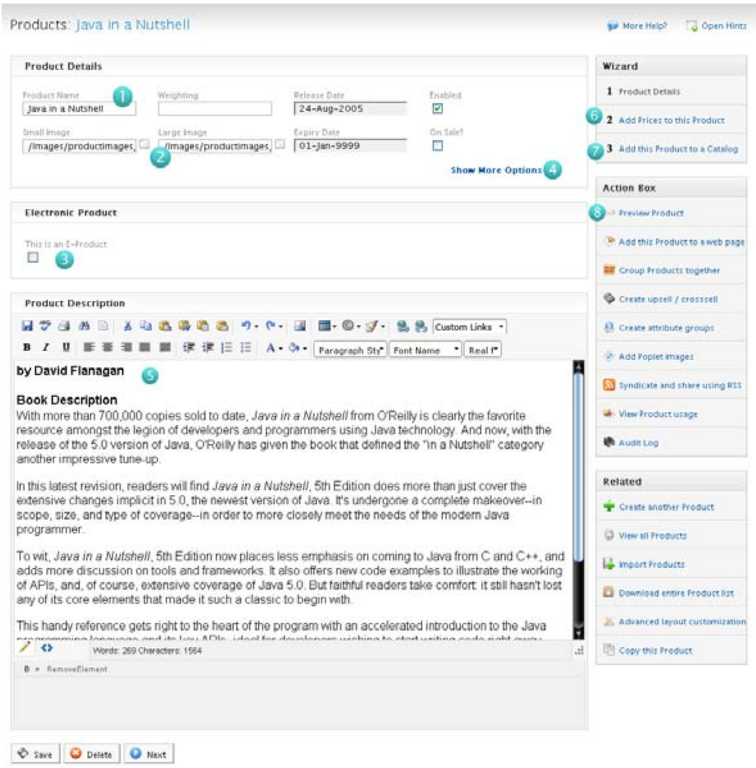
4. You can set up inventory/stock control, by clicking “show more options”.

5. Give your product a detailed description here in the editor.

6. Add Pricing and Tax settings to your product.

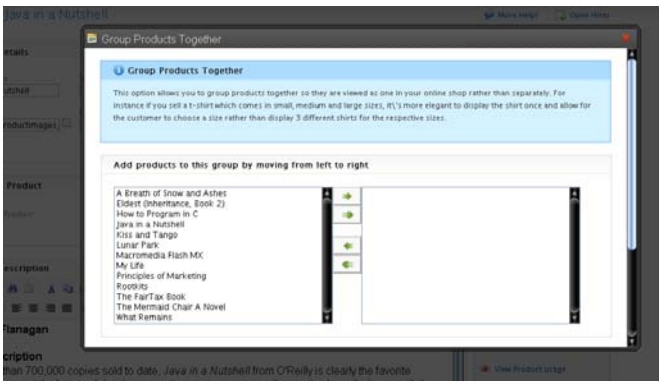
7. You can then add the product to a catalogue.

8. Once you’re done, preview the product and save.



Grouping Products

The Action Box on the Product View gives you to opportunity to group similar items together. You can group the product with other products. Grouping is used to link products that are almost the same, but differ in small ways – For example, for a t-shirt you would group the large shirt with the small size and medium size. Then people could choose which size they want when viewing the product.

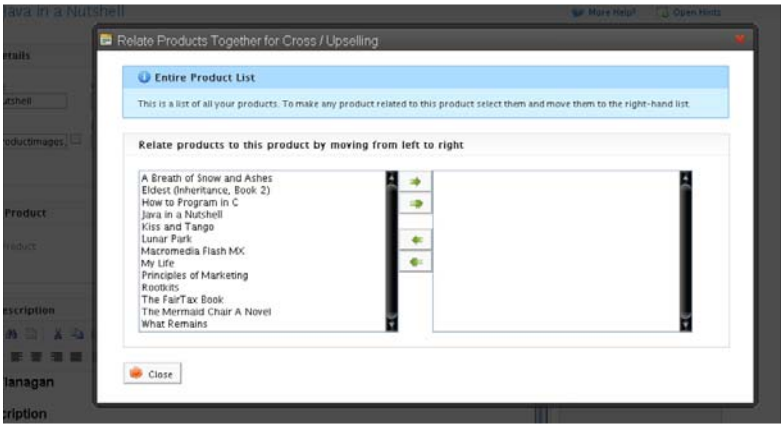


Group Products together by moving them from left to right

Related Products

The Action Box also allows you to relate products to one another. This means that (providing this has been set up in your shop layout) the related products will show up as clickable thumbnails or links when the user views the product view of an item related to it. Create related products via Up-sell/cross-selling relationships. This allows you to suggest or up-sell related products to your customers.

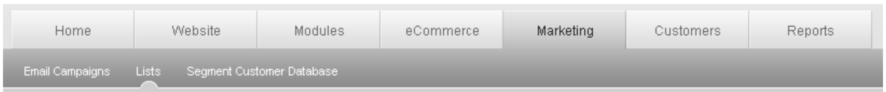
E.g. Mobile Phones may have Accessories related to that model as Related Products



Group Products together by moving the related product from left to right

Email Marketing

Let's take a quick look at email marketing with Online Business Console. First off we get started by creating some lists. You create lists to define the audience for your marketing. Since we've got an integrated customer database, your lists are simply a way to create sub groups within your main database. By the way, if you delete a list, you don't delete the people in the list!

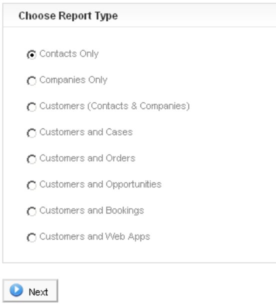


Once your list has been saved you are able to add customers to it through segmenting customer database.

Segmenting Customer Database

Segment Your Customer Database tab will take you to the custom customer reports section where you'll be able to define your recipient selection criteria

Click on the 'Create a New Customer Report' button shown in the action box. Now, choose your report type. Each report type will result in a list of customers. However, each different report type will also enable you to set extra criteria and export extra information based on the report type you choose.



For creating email marketing lists we're interested in the 'Contacts' type reports.

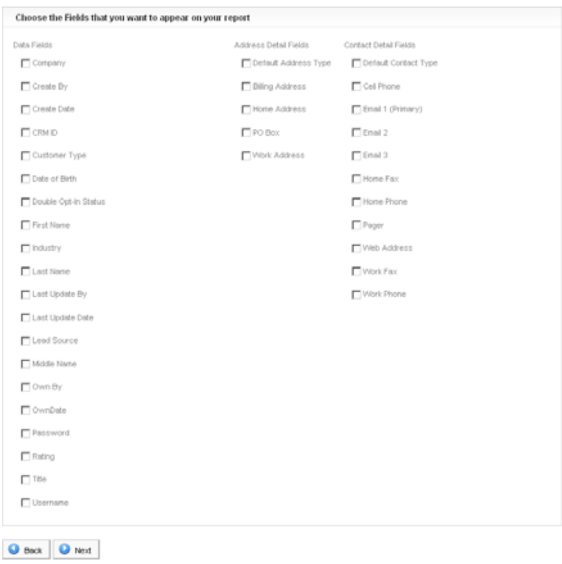
- Contacts Only is for a mailing list whose criteria and results are purely based on contact records (such as location, age, gender etc)
- Customers and Cases is for creating mailing lists based on who has submitted web forms and their responses.
- Customers and Orders is for creating mailing lists based on customer’s orders e.g. you may want to target high spenders at your online shop whose shopping basket exceeded a certain value.
- Customers and Opportunities is creating mailing lists to be sent to prospects who have sales opportunities in your system. You may want to send an email to the group of prospects who are in the final stages of the sales pipeline to give them a final push.
- Customers and Bookings is for creating mailing lists to be sent to customers who have made bookings in your systems before.

Important Each Report Type is slightly different. We recommend you explore each type to understand the differences fully.

Selecting What You Want To Show

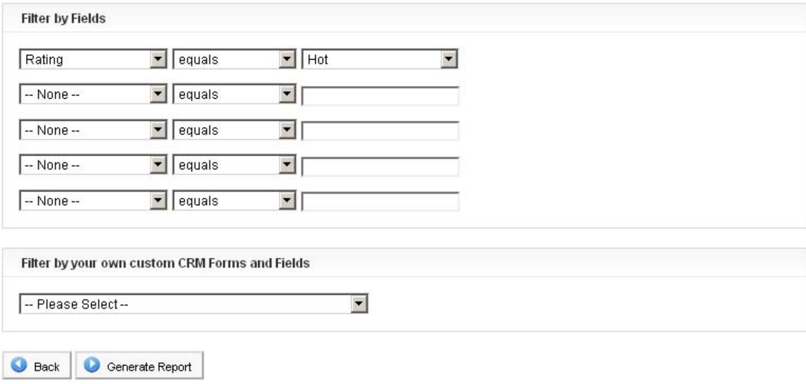
When creating a mailing list, the system will put the customers name and email addresses into the list only. However, to ensure our report is correct, it's helpful to show any other relevant fields.

- Customer Name
- Email 1 (Primary) - so we can see the customer's email address



Click 'Next' to move onto the following step.

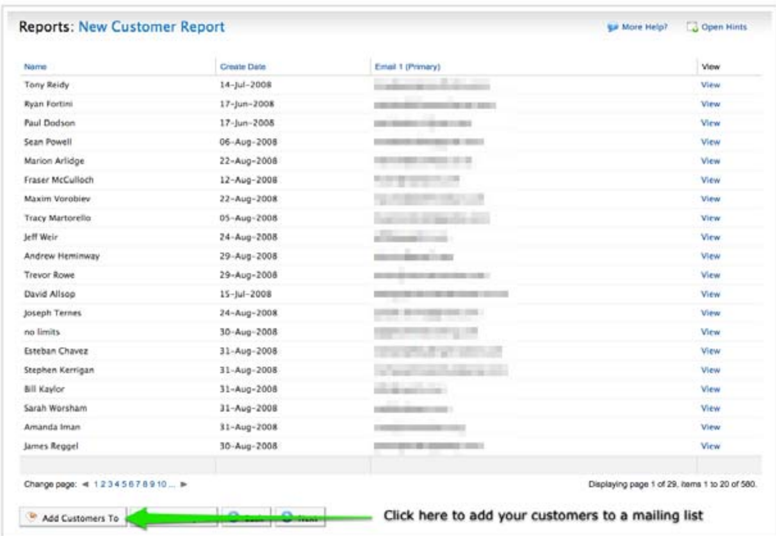
In this stage of the process you'll need to apply the relevant search filters to your customer records.



If you want a list of all customers who you have rated as a 'hot prospect' you would filter as above. As you would've noticed, you have the ability to select customers based on all different types of criteria that you're able to choose in the filtering step.

Click on 'Generate Report' after you've set your criteria

You should now see a list of customers with their email addresses.



To add these customers to a mailing list you'll need to click on the 'Add Customers to' then choose the mailing list and then click on 'Submit'

You've now successfully created a targeted mailing list for customers!

As you would've noticed, you have the ability to select customers based on all different types of criteria that you're able to choose in the filtering step.

You've got the option of creating mailing lists with customers who've submitted an inquiry in the last month by using 'Customers and Cases' or a mailing list with customers who are close to the end of your sale pipeline with 'Customers and Opportunities' or even customers who've made a purchase on your online shop in the last 3 months with Customers and Orders.

Email campaigns

Before you create an email marketing campaign you have to *choose the type of campaign* you want to send. If you are new to email marketing then more than likely you will want to send an email to a number of your customers and measure its effectiveness. When we talk about "measuring effectiveness" we are referring to how successful your newsletter was as far as how many recipients received and read it. Every time you send out an email newsletter, the *system will automatically measure who opened your email,* which links within the email they selected and how many recipients unsubscribed from your newsletter. There are also many other useful reports that will help you measure the success of your campaigns.

There are 3 main parts to every email newsletter campaign:

- Choosing the type of campaign
- Writing the content of your newsletter
- Choosing the recipients of your newsletter

One-off vs. loyalty-based campaigns

One-off campaigns are the most popular forms of email marketing. A *one-off campaign* is an email newsletter that is sent to a group of your customers at some date in the future. For example you might write a newsletter called "April Newsletter" and send it to your customer database. This is a one-off newsletter. Of course you may continue on and send another newsletter in May called "May Newsletter" but again, this is a one-off newsletter. If you are new to email marketing then you should start with a one-off campaign, then when you are ready you should also explore loyalty-based campaigns.

Understanding Loyalty-based campaigns

Loyalty-based campaigns automate communication to a group of your customers on a one-by-one basis. There are many types of loyalty-based campaigns.

To give you a better understanding here is an example of a birthday loyalty campaign. Imagine you are a restaurant, a hairdresser, a massage parlour or any other type of business which regularly deals with customers.

If you are in a position to collect your customer's date of birth or even just their day and month of birth, then you can setup birthday loyalty-based campaigns that automate communication to your customers on a one-by-one basis.

Once you create one of these campaigns and choose the list of recipients, as each customer's birthday month is reached a customised email is sent to that recipient alone. For example you can send an email wishing them happy birthday and include a sweetener such as a 20% discount or a 2-for-1 voucher if they purchased with you in the month of their birthday. This process continues around the clock and for every single customer in your recipients list. You needn't remember when customer birthdays are but you can rest assured that you are wishing them happy birthday and keeping them up to date with your latest products and offers.

Sending a one-off campaign

Creating a one-off campaign is a simple and quick process. You need to have covered off 3 essential items.

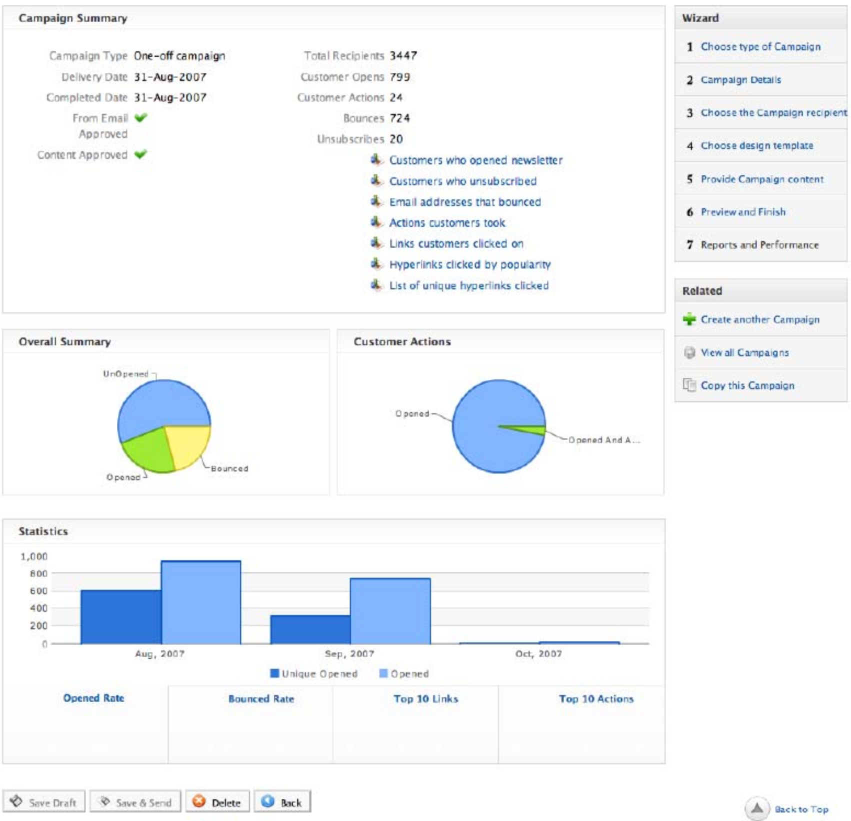
1. The **date** to send the campaign

2. The **content** of your campaign

3. The **recipients** of your campaign.

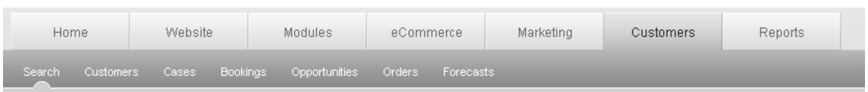
To get started, Click on create a new campaign under Email campaigns tab and use the wizard to go through the steps to create your one-off campaign. The wizard is intuitive and allows for the creation of stunning newsletters without any prior technical knowledge just follow the steps from 1 to 7, and don't forget to Save at the end!

Once you've set up your campaign you've got access to a range of in depth reports to help you track and improve your email marketing!



Contact Management

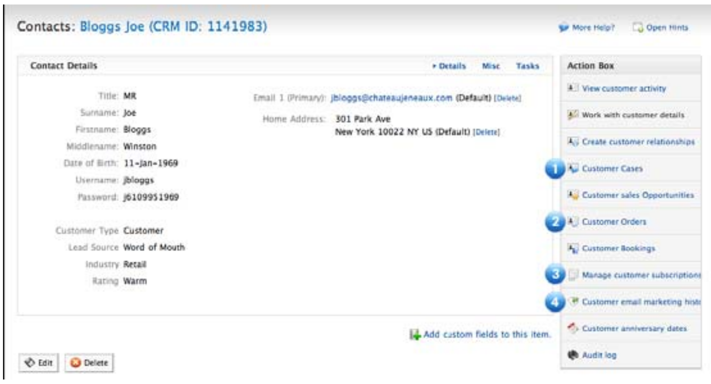
The *Customers* tab gives us access to our complete customer database which is automatically growing as your customers interact with your website



Customers tab

Why not add yourself to your database to see how it works? Simply 'create a new contact' via the action box on the right hand side and fill in the required fields.

NOTE – Once you have entered contact and address type you will need to save before using the drop down menu to add further details



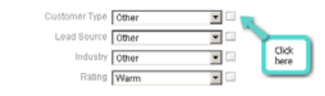
1. You can see all past web form enquiries, called *Cases*
2. Previous orders are linked to the customer record too.
3. *Subscriptions*. Tells you what the customer is subscribed to and allows you to subscribe them to other campaigns
4. *Email Marketing History*. To see what campaigns have been read and actioned.

You can drill down to see the customers email marketing history and see what newsletters have received and how the customer has reacted to them

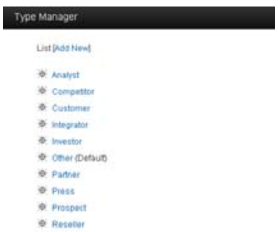
To edit customer details once record has been saved, you need to 'work with customer details' (action box). To view any relationships you have created between contacts you will need to 'view customer activity'

Filters

You are able to define customers by type, lead source, industry and rating. Your online Business Console has some pre-set filters in place however if you would like to add more or remove any that do not suit your business you can do so when editing any record.



The below screen will open in a new window



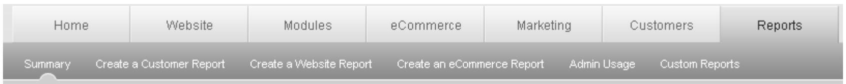
You have the option to ‘add new’ at the top of the page.

You can click on any value to edit/delete.

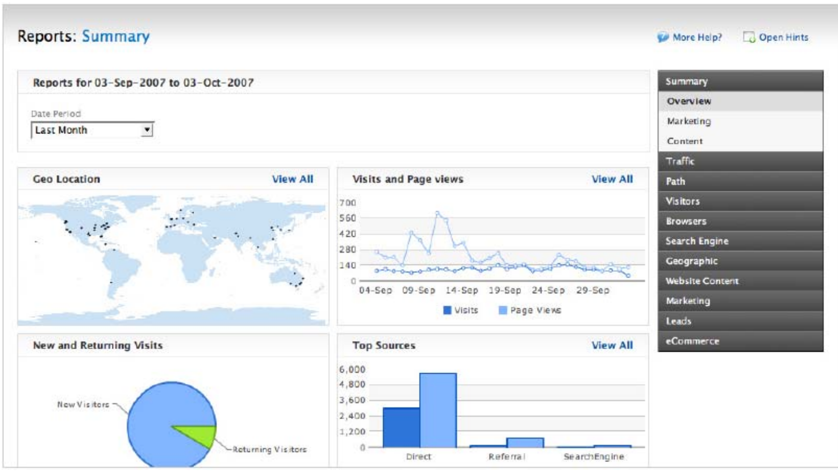
You can filter records by any values back on the *customers tab*

A list of customers who match the filter requirements will then appear below for you to view.

Reporting

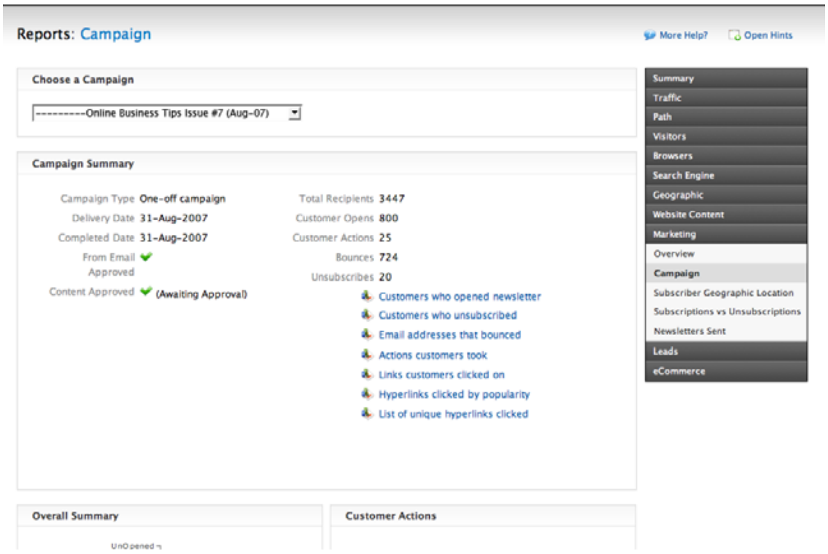


First stop - the summary screen.

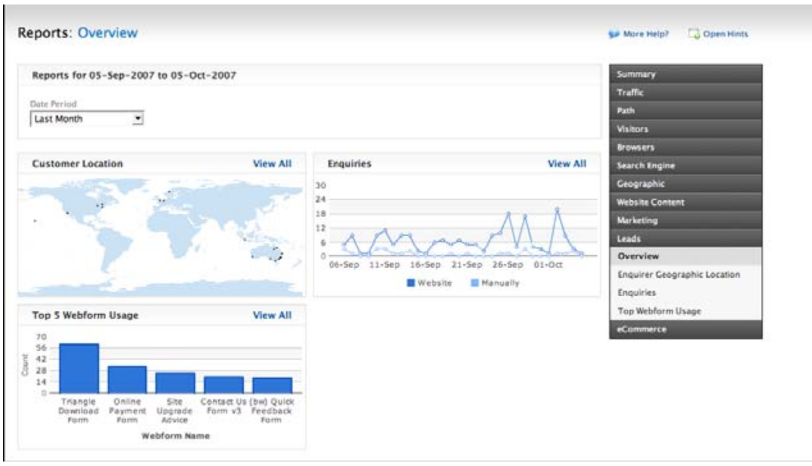


From the summary screen you can see all your reports, and then drill down into more detailed reports on traffic, customer paths, visitors, browsers and so on.

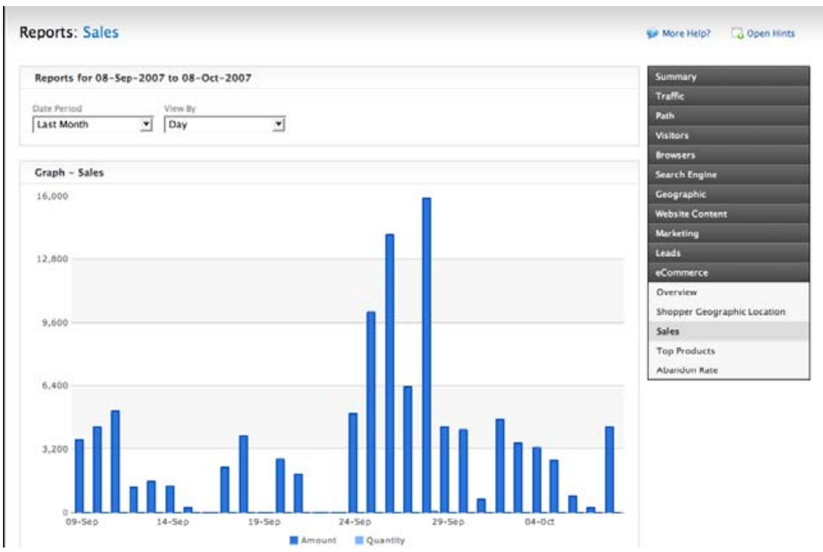
But this isn’t just about the usual analytics - you can view email marketing statistics and drill down to specifics



You can measure how your contact forms are performing under Leads



And check out how well your Online Shop is going, and where you can improve. And this is all from your central reporting console



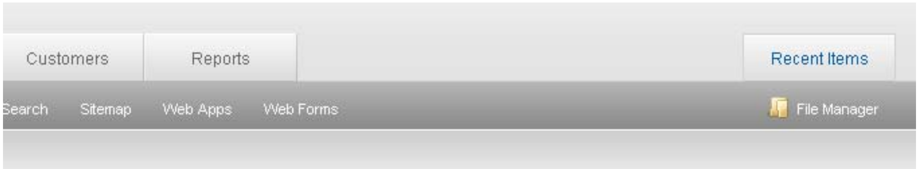
You can slice, dice and filter your data with our custom report generators - to find out exactly what you want to know. Create your own customer reports (as detailed in email marketing section of this guide), websites reports and ecommerce reports.

Some Final Words

We've seen how to set up an online shop, how to create email marketing lists and campaigns, and how to track and measure the success of our online shop. Now just a few more things....

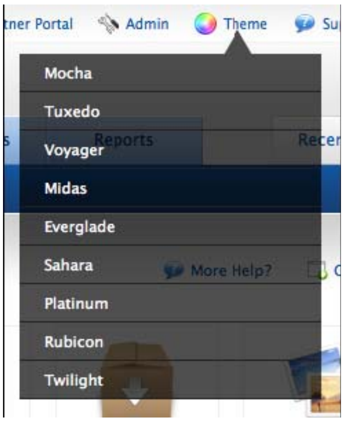
Recent Items

Firstly you've got your recent items button. Click on it to quickly jump back to the items you were looking at or working on



Themes

Secondly, have a bit of fun. You can use the themes to spice up the interface to suit you



The End

So that's it!

I hope this has helped you get started with the system.

Thanks again for signing up and best wishes for your online business!