How to guide:

Content Management System (CMS)

www.moonstone.co.za/media  
Username:  
Password:

Index:

* Moonstone website Structure *pg 2*
* How to do basic tasks on the CMS:
* 1. Publishing a Post: (Moonstone Online – articles) *pg 3*
* 2. Uploading a new document onto the website: *pg 7*

Structure: Moonstone.co.za

1. Page: Moonstone – online

* Posts (online news)
* Advertising
* Sidebar: (Twitter feed, Carreers feed, Advisor Store link, Latest post feed,Protector Service ad)

1. Sevices:

* Page: Regulatory Exams
  + Main page (service copy + hyperlinks(exam schedules etc)
  + Filebase: FSB library
  + Filebase: Examination library
  + Registration link to external registration website (faisexam.co.za)
* Page: Moonstone Compliance
  + Main page (service copy + hyperlinks)
  + Filebase: FSB library
  + Filebase: Moonstone library
  + Sidebar: Borchure download (Comprehensice Services)
  + Sidebar: Protector service link (external)
  + Contact Forms: Compliance Enquiry Form (sidebar)
* Page: Moonstone Licensing
  + Main page (service copy + hyperlinks)
  + Filebase: Moonstone library
  + Sidebar: Borchure download
* Page: Moonstone Training: Skills & Qualifications
  + Main page (service copy + hyperlinks)
  + Sidebar: Borchure download
* Page: Moonstone Formation Refinery (Pty) Ltd
  + Main page (service copy + hyperlinks)
  + Sidebar – hyperlinks to external Rates x2
  + Link to advisor store
  + Filebase: Moonstone library

1. Page: Careers
2. Page: Advisor Store (Books & DVD’s)
3. Page: CO Desk

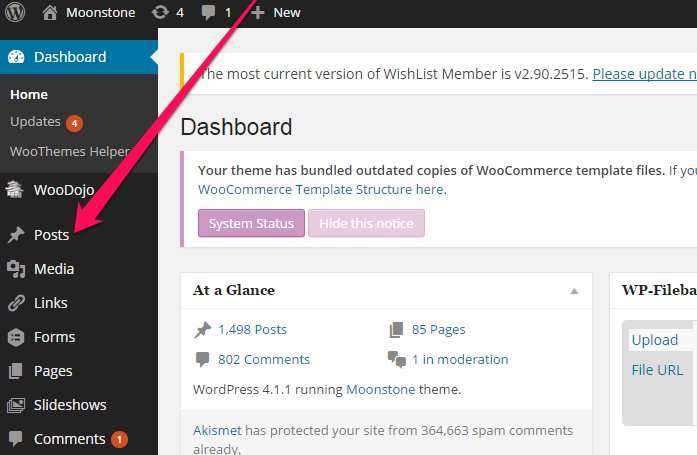
* Blog post
* Q & A
* Knowledgebase

How to do basic tasks on the CMS:

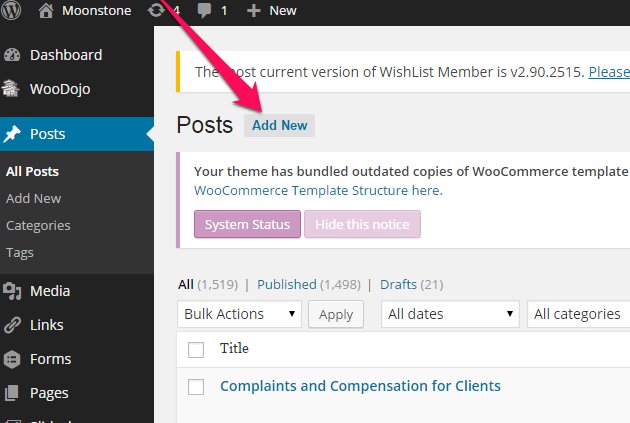
1. **Publishing a Post: (Moonstone Online – articles)**

*To be uploaded on same day as publication (Mondays, II and Thursdays, Monitor) – a slight delay can be scheduled for the articles to only be available by 16H30 on the day.*

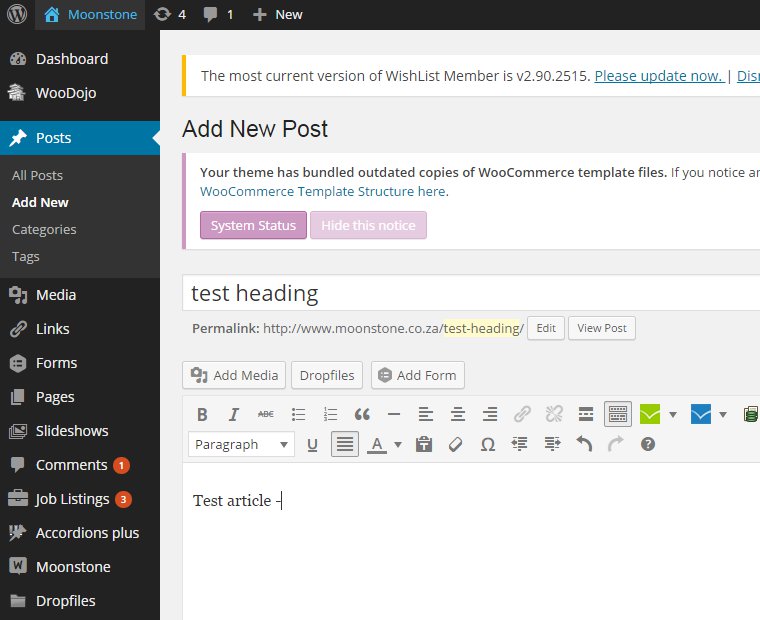
1. On the dasboard select “Posts”



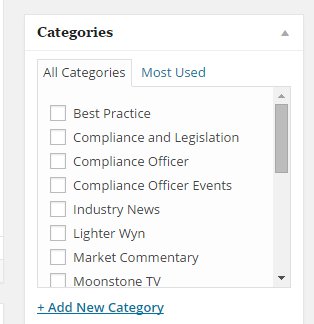
1. Select “Add New”



1. Copy the article, paste into post & enter the title.



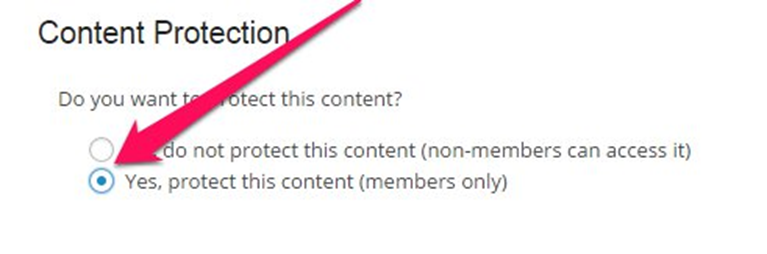
1. Categorize the article ( depending on the particular topic) – *you will note the* *Categories on the right sidebar on the same page as the “New Post” page*



NB: Make sure text all same size/format/colour

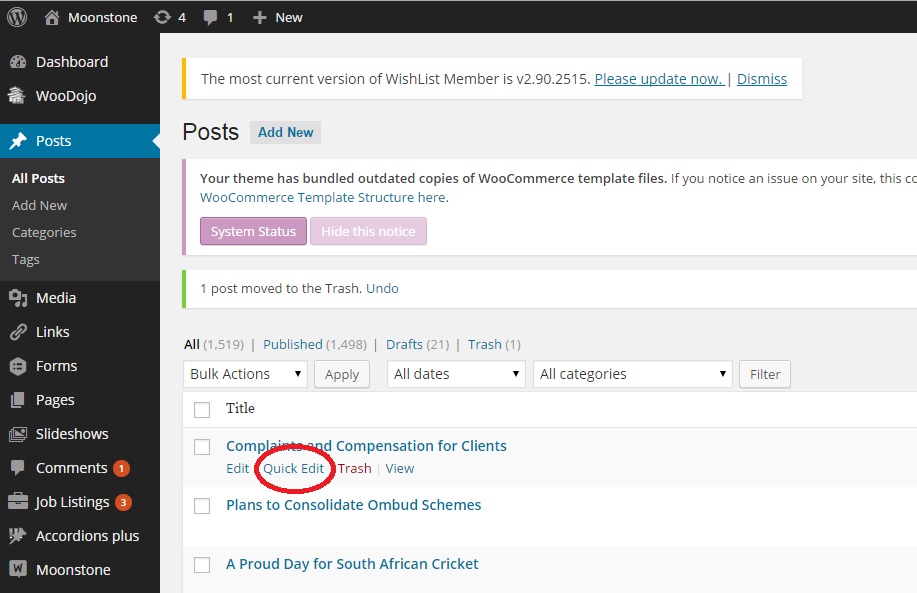
‘Preview’ the article before pressing ‘publish’

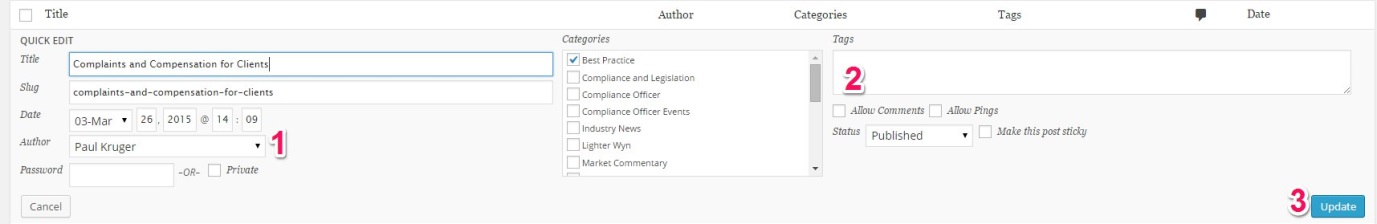
e) Content Protection  
 Select “Yes” option at Content Protection for CO Desk posts only



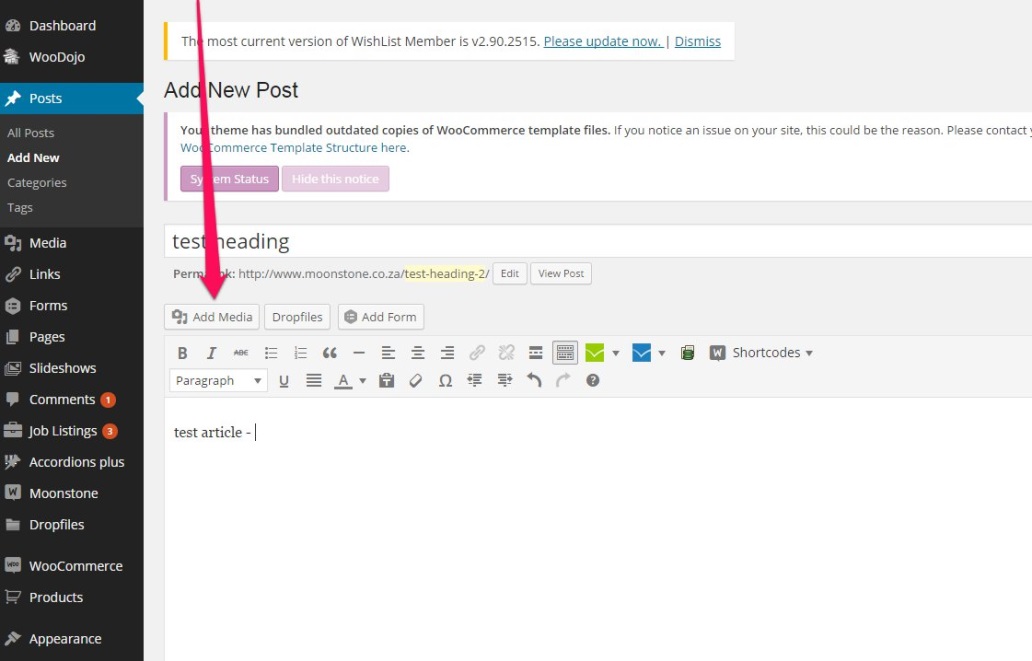
1. Once published - change “Author” 1 & Add Tags relevant to article 2 and update 3.

Go to - All Posts page – select *quick edit* function on the relevant post (hower over article title and “Edit Quick Edit Trash” View menu will apear – see below)

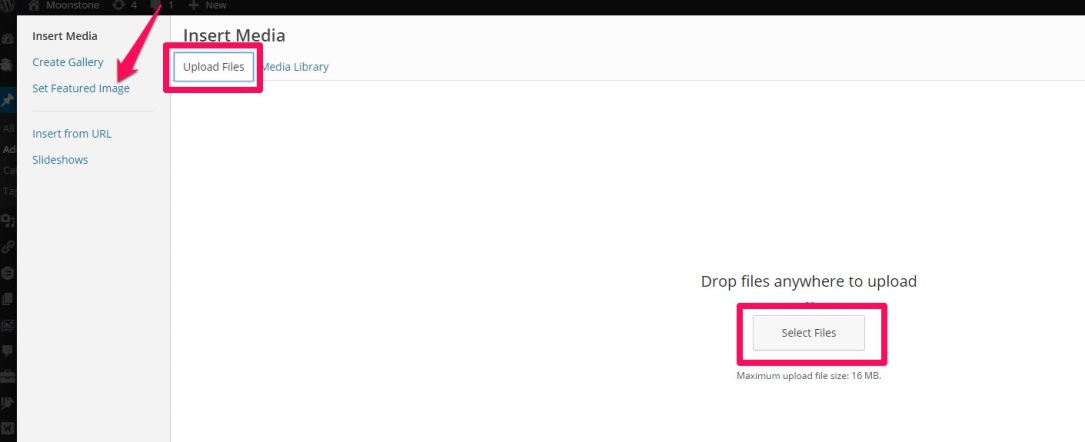




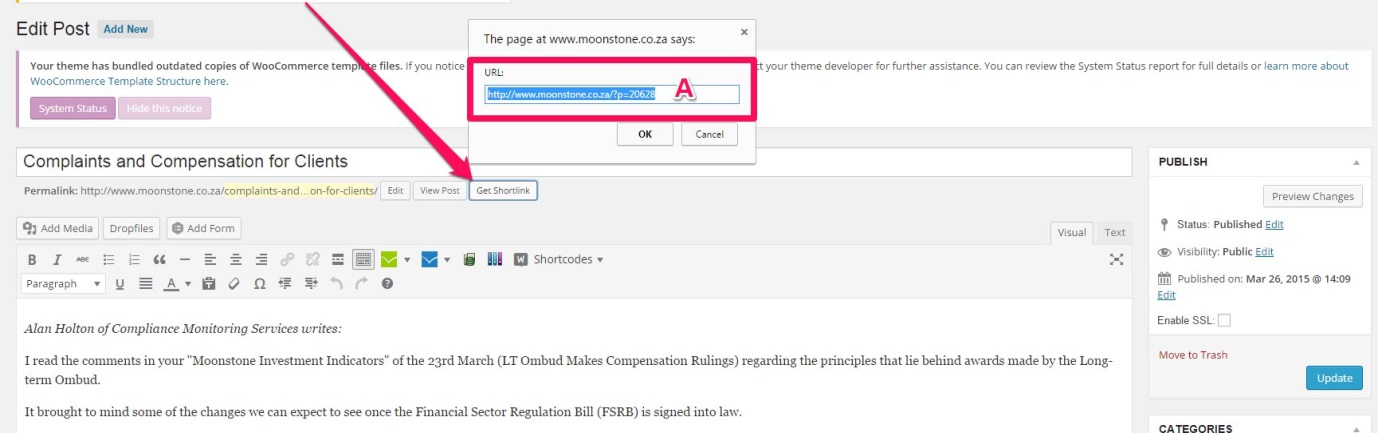
1. **Featured image:** Set Display Image (Size 610x220)

* Use new pictures, not the old MS Word Graphics – Select “Add media” select featured image.

Select “Upload Files” – Select Files (once uploaded) – select as Featured image



1. **Selecting a article link  
   Once a article has been published - select “edit post” on “all post” menu – select “get shortlink” and copy & paste link A.**

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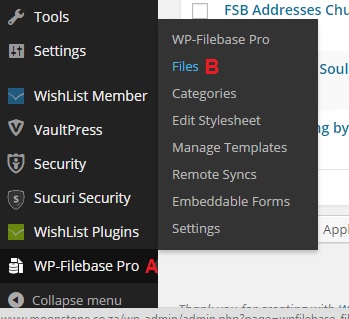
1. **Uploading a new document onto the website:**

Plugin: Filebase Pro

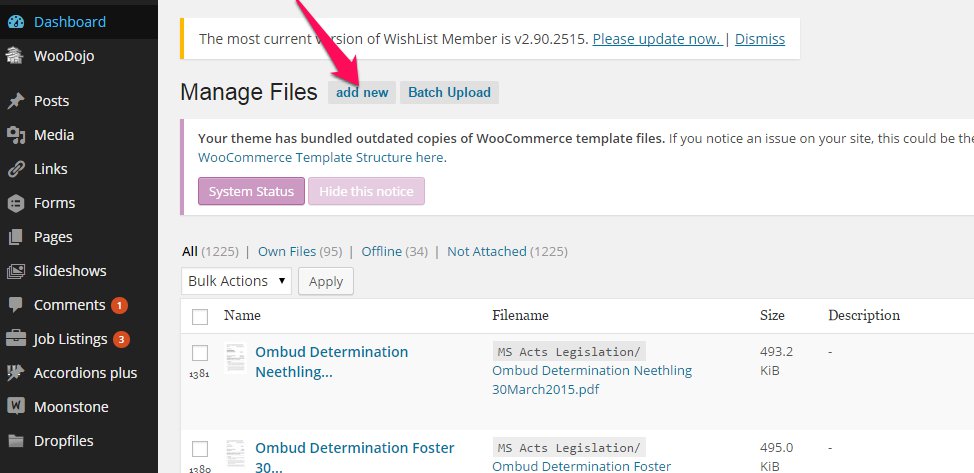
1. Save Document as PDF on Website uploads –

*public drive: marketing/webstite/website uploads/ (Use format: moonstone-\*\*\*\*\*.pdf)*

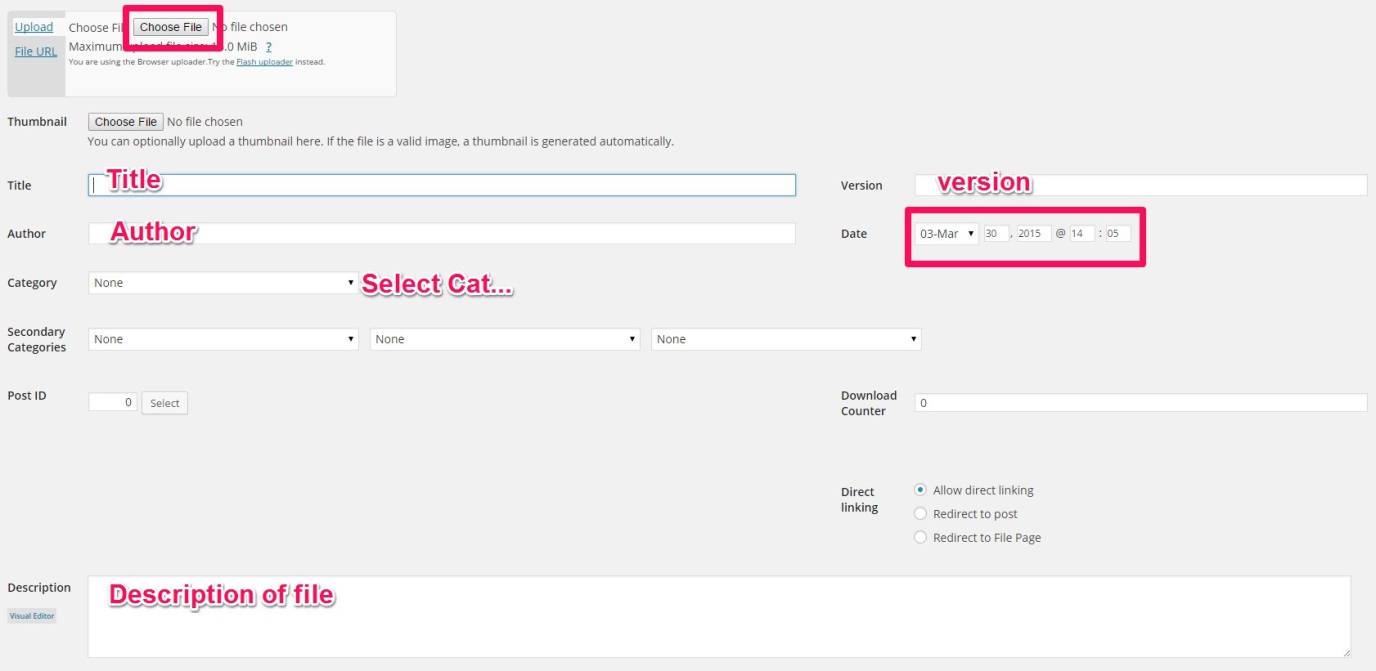
1. At Moonstone Dashboard:
   1. Select: WP Filebase Pro – plugin is located at the bottom of the navigation bar on the left. **A**
   2. Select: Files **B**



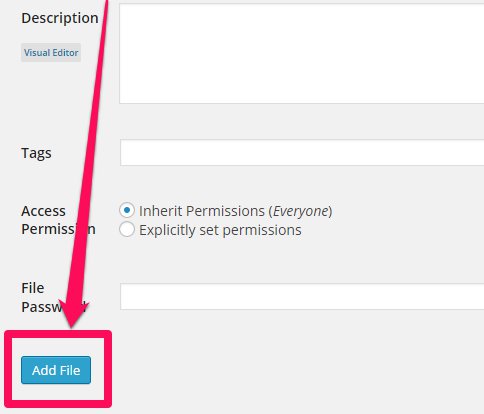
* 1. Select “add new”

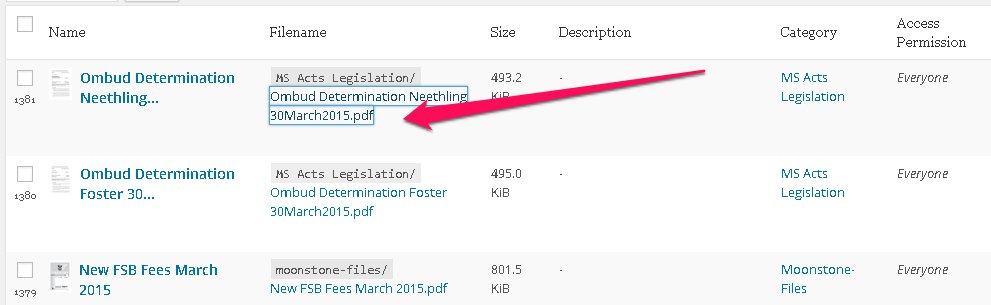


* 1. Choose File *(Browse function will apear)*
  2. Complete requested details – title, version(date), author, date & description
  3. Select relevant Category for the file



* 1. Add File





1. Right click on the filename. Copy Link address
2. Send link to whoever wanted the file to be uploaded.

Job listing – Careers platform

1. 2 Options

* Featured option (ad appears on website & e-newsletter)
* Website option ( ad appears on website only)

1. At joblisting, on dashboard, review ad for mistakes (Listing will display under “Pending Payment” tab)
2. Change the “author” to the clients name, update their profile picture and add “about us” of the company. (You will edit this under “users” not job listings)
3. Send email to client, saying that you received the submission and the ad will be active once payment is received.
4. Wait for payment to be made (follow up when payment is not received in time period)
5. Go to Woocommerce, find listing and “tick” once payment is received.
6. Activate ad.

Careers platform ad in Monitor en II

1. Public/Marketing/Website/Career Platform/Newsletter Copy
2. Open previous document
3. Check if all jobs listed is active.
4. Get Anton to take off old listings (by changing them to red) and add new listings (change to yellow)
5. Change footer to ms-dk/date?
6. Send document to anton van rooyen every Monday/Thursday mornings before 10am.

Social Media

* Try to post all articles on all social media platforms throughout the week. (Twitter, Linkedin, Twitter automatically posts on facebook as well)
* Join LinkedIn groups on which you can post articles that Paul writes

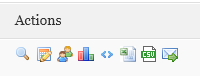
Queries received via website

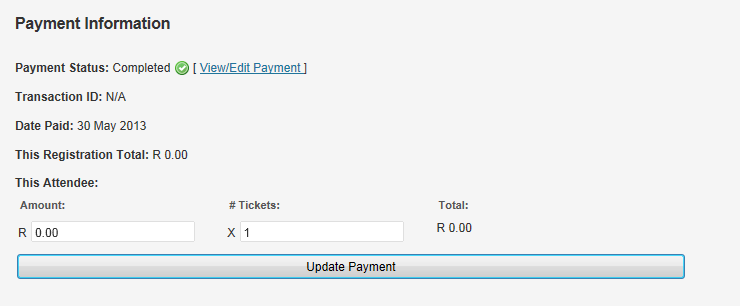
* Licensing - Abigail Sampson [ASampson@moonstoneinfo.com](mailto:ASampson@moonstoneinfo.com)
* Training / long term / short term FAIS accrdiatation etc - Ronel Nell [ronel@moonstoneinfo.com](mailto:ronel@moonstoneinfo.com)
* Examiniations – Fais Exam
* Newsletters – don’t forward as Anton v Rooyen receieved these
* Marketing ( eg, workshops/study material/DVD/courses/ ) – us

Moonstone people

* Make sure Moonstone collegues are always updated with their profile pic on the ‘my contact page’ on the website – contact Schalk with updated picture information and stipulate the department in which they work in.

Events Page (when setting up a Workshop eg.)

* When creating an event (workshop) call upon Schalk
* Make sure you have all details
  + - Event Name
    - Venue and address
    - Start and end date of registration
    - Start and end time of event
    - The presenters
    - What you will be charging each induvidual ( excl VAT)
    - Attendees limit
    - Refer to ‘Workshops’ folder in Public/Marketing for examples on how the invite looks
* To manage events:
  + - Wordpress / MS Events / Event overview and click on the specific event
    - There are various actions on the right hand side, which can be chosen from in order to control ( View/ edit/ delete/ attendees and Export to an excel speradsheet)
    - 
* To manage payment:
  + - Proof of Payment is asked for as the client books and pays
    - Client receives an invoice upon booking via our events page on the web
    - POP is sent to the email address stipulated through an email as an attachment along with the booking and invoice form
    - Once received, go back into the event and click on the induvidual.
    - Go to payment options and after checking the person paid the correct amount into the correct bank account, change his payment status to ‘Complete’



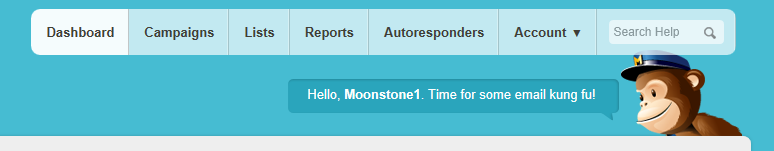
* + - Reconcile towards the end of the registration date with Tracy in finance
    - She will print out a list showing all persons who have paid the specific amounts
    - Go into each person within the event and click on complete.
    - Contact those induviduals who have not paid 5 days prior to event.

Updating exam schedules

* Apon recieving update from Filansia
* Save doc in Website uploads, RE updates
* Then go to Moonstone Dashboard
* MS Filebase
* Files
* ‘Search’ ‘Moonstone Examination Dates - 2014’ in the search tab or for Afrikaans ‘ AFRIKAANSE EKSAMEN’
* Replace file by clicking on the ‘Browse’ tab
* Remember to always press ‘ Update’ at the bottom!
* Go to Pages and select “Regulatory Exam” page.
* Update hyperlink with new link to the updated file

Mail Chimp

* Use this mail system, before, during and after the event
* Before – is used to get the attention and detect approx. interest of attendees per event.
* Steps:

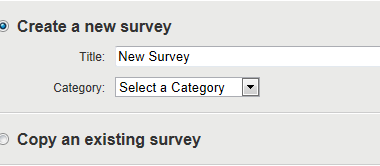


* + - Campaigns – you can either build a new campaign or replicate one my choosing’ My Templates’ depending on the function you want to perform
    - Or replicate straight from campaign
    - Refer to my templates and previous campaigns done in the past.
    - Create a list by adding email addresses (export via excel ) is the easiest
    - Always send a ‘test’ to your email address before sending it out

Survey Monkey (when wanting feedback or conducting a random survey)

* Use the templates that have been conducted in the past:
* Go into ‘Create Survey’



* Either create and new one / or copy an exsisting one ( depending on your function)
* 
* Title and categorize the survey
* Discuss new questions with bobby and once decided then create new survey
* If using existing one, make sure all questions are relevant otherwise ‘edit’ each question.
* Always send a test survey, and always Preview the survey before sending it out
* After designing and sending out survey – monitor it / collect repsponses and analyse results



Creating Monthly Report

Login to <http://www.google.com/analytics/index.html>

Username: pkruger@moonstoneinfo.com

Password: moonstoneinfo



All previous reports are saved in Public/ Marketing / Management reports / 2014

The excel stats are saved in the Data graphs.xlsx

Follow the Index steps and work through these on new month ( copy and paste from previous months)

INDEX:

1: Website

a. Absolute Unique Visitors (AUV)

b. Traffic Sources

c. ‘Contact Us’ webpage stats

2: Campaigns / Events / Brochures

3: Blog

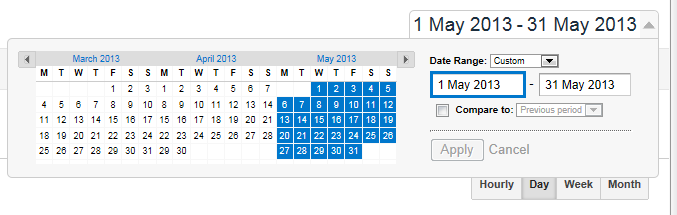
4: Social Media

5: Newsletters

6: DVD’s

TO START:

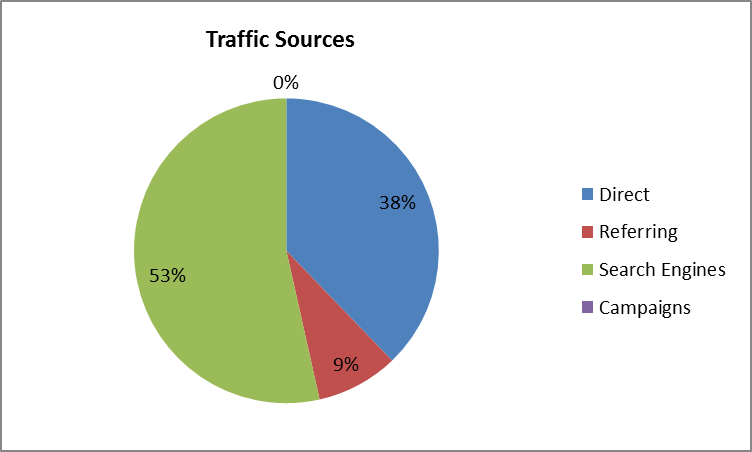
Choose your month and press apply:



A: Find Unique visitors and place amount in the excel spread sheet – ‘ Visits for Website’

b. Traffic Sources are also done by clicking on Traffic sources / overview and then refer to the pie chart which is displayed

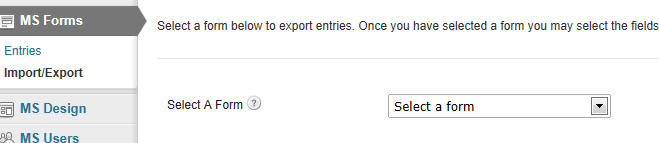
* Complete information on the Traffic Sources excel sheet then copy and paste chart into the Full REPORT



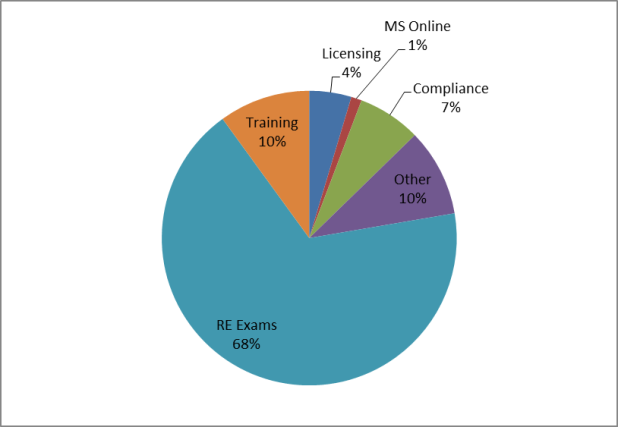
* Also record top referrals and keywords which is displayed

The 1c: Moonstone ‘’Contact us’’ Webpage statistics – is done via the MS Dashbord

* Select MS Design then select a form - Choose contact Page – Sept 2012



* Select ‘Please select the relevant department’
* Capture correct date range( start and End)
* ‘ Download Export File’
* Export and sort colum A by selecing A-Z
* Count each relevant department and capture in Excel spread sheet in Marketing/ Management reports and Stats ( ‘ Contact us’ graph)
* Copy and paste graph in month ‘Full Report’

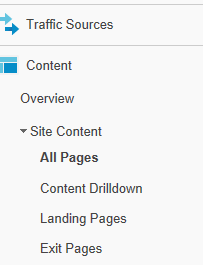


3: Moonstone Blog: ‘Pauls se Perspektief ‘

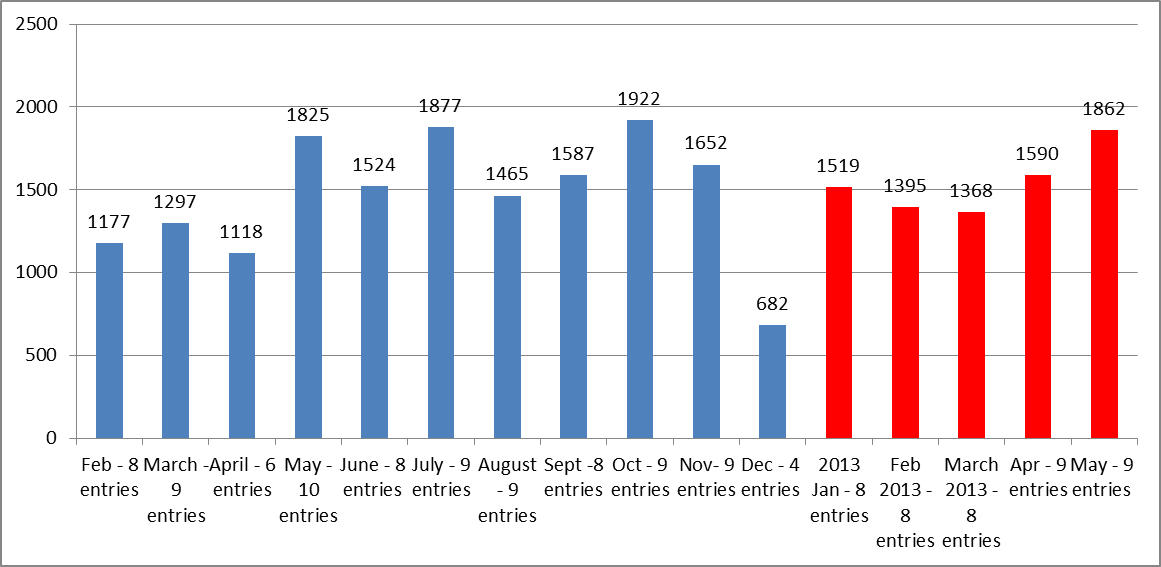
* Is done via Dashboard
* Select ‘ all posts’ on left hand side
* Use the Show all dates and choose month. Then Filter by selecting Pauls Perspektief



* Capture names of blog entries
* Then go to google analytics
* Content / Site Content / Overiview and All pages



* Capture Unique Page views per entry
* Calculate Ave Monthly Blog visits by dividing the total visits by the number of entries
* Capture this on the BLOG ENTRIESExcel Stats sheet and copy into the full report



4: Moonstone Social Media -

* Captured by login into each media account – stats are shown on webpage

5a: Moonstone Newsletters

* Request form Anton – at end month

5b: Newsletter Advertisements

* Media Marx Stats are sent by Michelle
* Total earning for newsletter stats are received by Tracy van Heerden on a monthly basis

6: Moonstone DVD Orders

* Received by Tracy van Heerden on monthly basis
* Capture on excel spread sheet and copy new graph into Full report

NB Make a summary report by taking the details from FULL report.

May - M & C - Summary Report

Points and stats to capture on Summary:

1: Website  
2: Blog   
3: Social Media   
4: Newsletters

5: DVD’s