

Claiming Your Branch Listings

101: How to claim your listings pages

Whether you are listing your credit union for the first time, or re-claiming a location to clean it up, here are six very important things you need to know before getting started:

1. **Remember your login information and passwords.**
 - You will be creating an account *for each provider site*, and your username may not always be available. It is important to store your information in a safe place.
2. **Do not always follow the exact instructions these websites give you.**
 - Some of the steps listed online are outdated or do not work with systems you have set up internally. If necessary, look for opportunities to get a live person on the phone (we will provide you with the phone numbers we found).
3. **If you work at headquarters office, to claim your businesses, it will generally have to be done through each branch location.**
 - These search engines want to make sure you are who you say you are. Whatever phone number and/or address you are using for the business, the search engines will double check through either a phone call, text, or pin number they mail to you.
4. **All of these websites are very sensitive, if you try to hit the “back” button once you are in the process of listing a business, you will lose everything and have to start over.**
5. **Keep your data relevant**
 - Many credit unions, members, and prospective members are surprised with information they find on listings because is incorrect/not updated, even linking them to the wrong website.
 - If your credit union is **already listed** and the information is incorrect, it’s likely the information is incorrect in other places. *Your goal is to claim the listing so if your information changes in the future, or if you want to make updates, you can do so because you own the page.*
6. **Listing your businesses will be worth it**
 - Once you have claimed *all* your locations across *all* the search engines, signing back in is a piece of cake. It’s a great feeling to be in control of all your listings and your search rankings will improve because of it!



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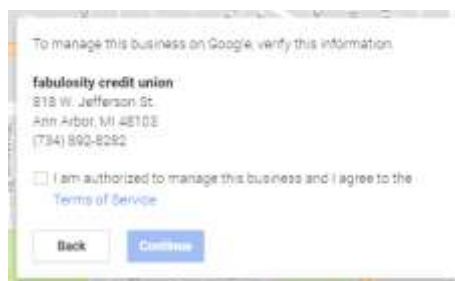
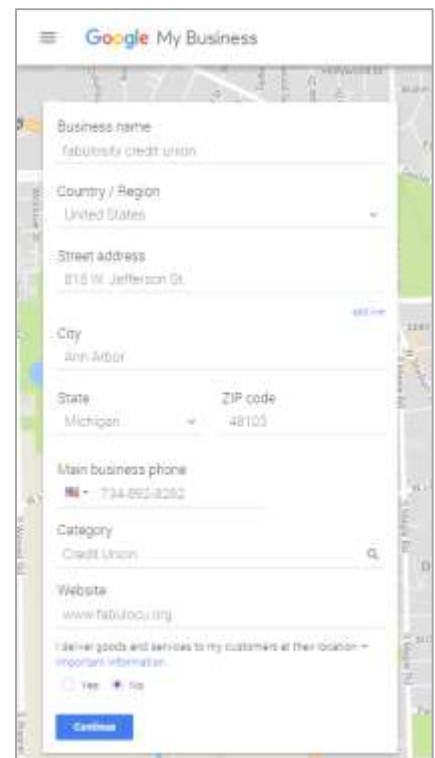
1. Let's Start with GOOGLE

Here are the steps to getting listed on Google:

- For reference, the Google My Business support center is located here.
- In this day and age, the majority of businesses are already listed on Google. If you see your credit union branches already listed, this may have happened because you, a former employee, or a member already listed it.

Before you begin: Make sure to check that no one else currently at your institution has an active account used to manage locations, as having access to that account could expedite this process.

1. Visit www.google.com/business.
2. Click **Start Now** at the top right corner of the page. NOTE: they do provide a phone number (1-844-491-9665) you can call and walk through setting things up with a contract employee. The experience varies depending upon who you speak with, but if you'd prefer to do that over following the steps below, that is an option.
3. Sign in - mostly likely, you'll want to use a CU account. You can create a login by choosing **Create An Account** on the login screen.
 - If you create an account with your credit union email, you may be asked to verify via an SMS text, then an email, or just via email.
 - Once you click the activation link in the email, you'll be able to log in to your My Business account.
4. Once you're logged in, you'll see a map form at the top left (see picture to right here). Enter your branch information in the first field.
5. As you type, suggestions for possible matches will appear. If you see your business, select it from the suggestions.
6. Complete the rest of the fields, then click **Continue**.
7. If you get an alert saying "Someone else has already verified this listing" skip down to the bottom of this section.
8. You'll get messaging asking to confirm that you want to manage that business (branch) on Google:

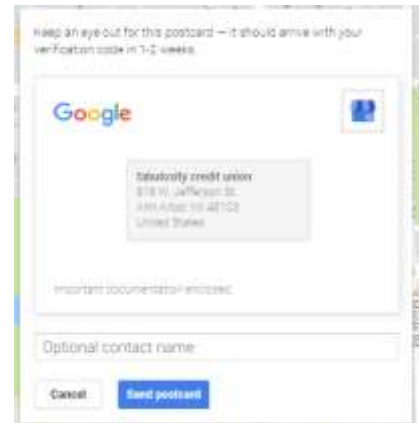


9. Next, you'll be asked to confirm you want the verification code via mail (this is the only option) – click "Mail".

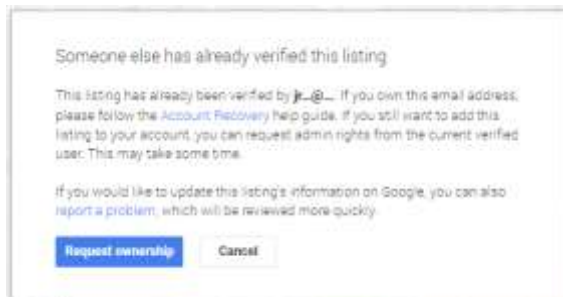


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10. They will confirm a postcard is being sent and that you should expect it in 1-3 weeks. That said, Google does tell us that the postcard usually arrives within 5 business days. You can also add a contact name to make sure your mailroom can route the postcard correctly.
11. Click to accept the confirmation, and you'll be taken to your Google My Business dashboard. The dashboard, once verification goes through, will be a big help in terms of listings management.
12. From this single dashboard, as you claim and verify all your branches, they will appear within the same interface. You can also add additional users if you want your team to have access as well.



If

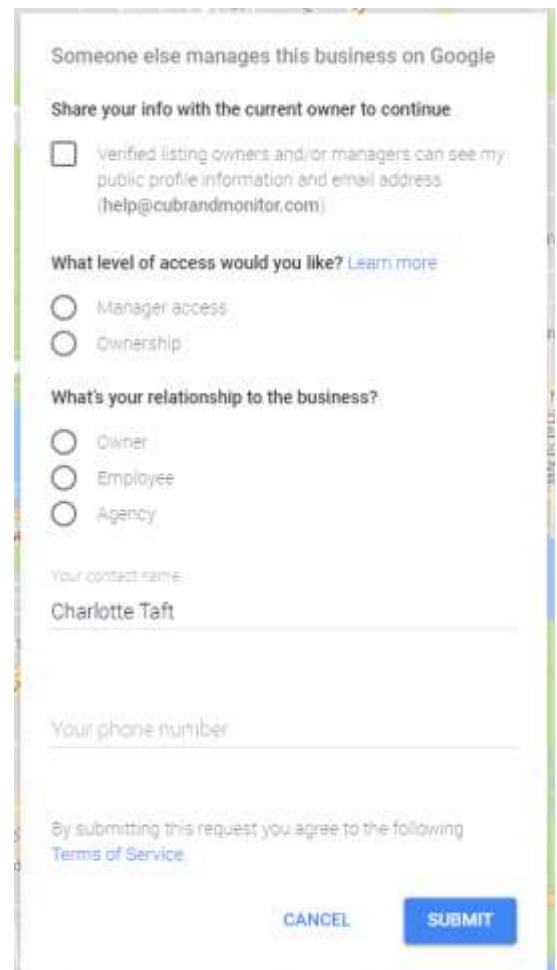


someone has already verified your listing, you may see a pop-up alert telling you this. If so, contact that person or follow the Account Recovery steps linked in Google My Business.

Next, you'll be asked to put in your information – and whether you'd like to share information with the current owner. For credit unions, 99.99% of the time the previous owner is someone who was or is in-house.

Google sends the existing verified owner an alert. If that person does not respond within the next 7 days, Google will then let you request to verify the listing via the above described postcard method.

Repeat all these steps with each of your branch locations.



2. Facebook

You may have not set up a Facebook page for every branch, but there is a very good chance one has already been created for you. That's because general Facebook users and 3rd party aggregators went out and created them for you (sometimes even creating duplicates), without your knowledge.

Facebook has changed the names it uses for different kinds of pages – and the word PAGE itself is something unique. Below, we'll go through the steps to set up a structure for your multi-branch credit union account.

What you might have at the beginning:

- One Facebook page for your credit union, likely tied to your headquarters branch location
- “Rogue” pages that were created by Facebook
- Additional branch pages you created

What you want in the end:

- One BRAND page for your credit union, which publishes the primary content feed and has links to all relevant information members/potential members may want. This will not be tied to an address/branch location.
- Locations pages for each branch, which allow users to add reviews and ratings, but which can show the content published on the main brand (previously called Parent) page.

What this will look like this:



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How do I get started?

Check all the known pages in the Listings Tab in CUBrandMonitor – this is your reference point. Which pages already exist for your credit union?

1. **Create a BRAND Page:** For your primary BRAND page, you'll take your current main Facebook page and migrate it into a location, leaving a BRAND page behind – this keeps the ratings and reviews you've already accumulated.
2. **Add Branch Locations:** Upload the addresses and info for your branch locations.
3. **Clean Existing Listings:** For "rogue" pages, you will want to claim or merge, where they will be replaced by/edited into Locations (see above image).

Step ONE: Set Up Brand Page – With Locations

1. **Configure Admin Rights:** Log in and make sure that the email you're using with Facebook is your work address. This verifies for Facebook that you are a representative for your credit union. If you've been managing with a personal email address, [we recommend following the steps shown here](#) and **add your work address as an admin**. Once you have that activated, log out and log in as the admin, so you can manage from that email address.
2. **Request Locations Access:** On this page, [request access to the Locations functionality](#) for your page. This will let you add each brand as an easy-to-manage Location, rather than as separate pages.
3. **Receive Confirmation:** Once the system processes the request, you'll receive a message in your support inbox, which lives under SETTINGS on your main page. This can take a few minutes.
4. **Migrate HQ Branch:** If the page for your credit union that you wish to use as the 'Brand' page has a street address on it, you will encounter a warning message asking you to either remove your address info or migrate existing ratings and reviews to a new Page. We recommend selecting to migrate, which will move that location-specific page into an official Location page. This means any ratings and reviews will go to that location, while overall information can stay on the "Brand" level.

IMPORTANT: Once you save, it can take a little bit of time for the system to process the changes, which will allow you to add Locations. We recommend turning your attention to dealing with any branch-specific pages, either claimed or rogue, then coming back and managing locations.

Step TWO: Verify Your Page

Verifying will allow you to rank higher in Facebook's results algorithm.

1. On your Brand Page – go to Settings. On the right side, there will be an option listed as Page Verification near the top.
2. Click Edit, then click Verify this Page.
3. You'll be given two options – to verify by phone call or verify by using documents.
 1. Phone verification: You can edit the phone number shown there, and add an extension. This process worked for some locations we've verified, and not for others. We recommend trying it before assuming it won't work.
 2. Documents verification: You can upload any of the following documents to verify the location:
 1. Business utility or phone bill
 2. Business license

Enter Phone Number

Enter a publicly listed phone number for your business or organization. We'll call you with a verification code to confirm you're at the business or organization this Page represents. Your privacy is important to us. Your phone number is for verification only and won't be shared publicly.

Business Phone Number: +1 262233925

Extension (Optional): 235

Country: United States (+1)

Call Language: English (US)

By continuing, you agree to receive an automated call from Facebook at the number listed above, and will accept any resulting charges from your phone company.

Verify this Page with documents instead:

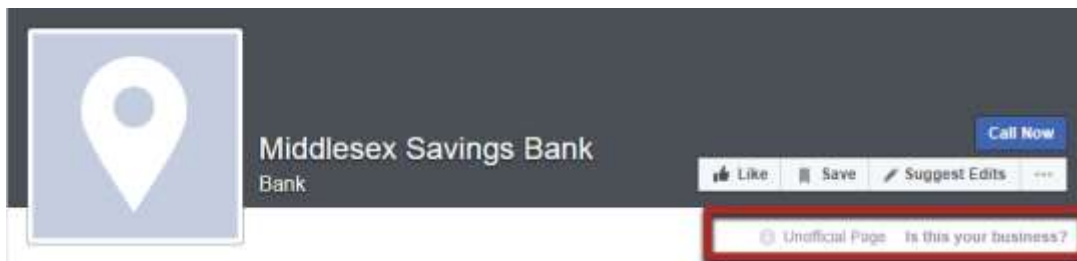
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3. Business tax file
 4. Certificate of formation
 5. Articles of incorporation
4. Once you've submitted these, you'll need to wait. Our verification came through within a week – and we were alerted by a message from Facebook within the app.

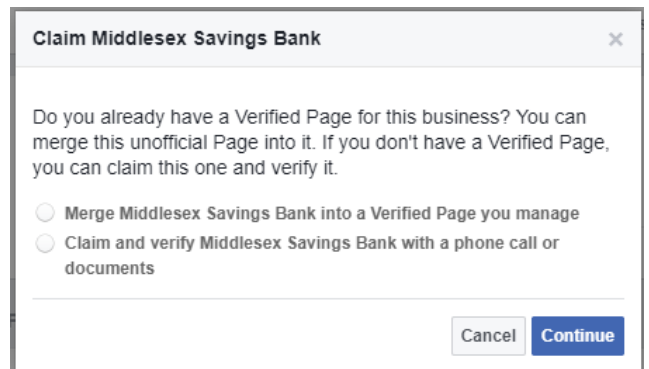
Step THREE: Merge / Claim Single Unofficial Pages

Note: To merge or claim unofficial or single (that you/your CU created) pages, you will need to be the verified admin for your main page.

1. CUBrandMonitor will show you all the Facebook listings you need to manage – **go to Listings and sort by Facebook** as your provider. You can click directly to the listing url from each listing shown on that page.
2. **Click on a listing and open it in Facebook.** If the Page is unmanaged, you'll see Unofficial Page below its cover photo. You can request to claim the Page and become its admin, and you can merge it into a Page you already manage for your credit union. Here's what that looks like:



3. **Click Is this your business?** below the Page's cover photo.
You'll be presented with two options – to merge the page into a Verified Page that you already manage for the credit union, or to claim and verify the branch – through a phone call or via documents, as described above.



4. **Choose to Merge the Listing:**
If your business e-mail is associated with your account, select it in the drop-down and you will be sent an e-mail to verify. If not, you will have to submit the documentation listed as described above when you verified your main page.

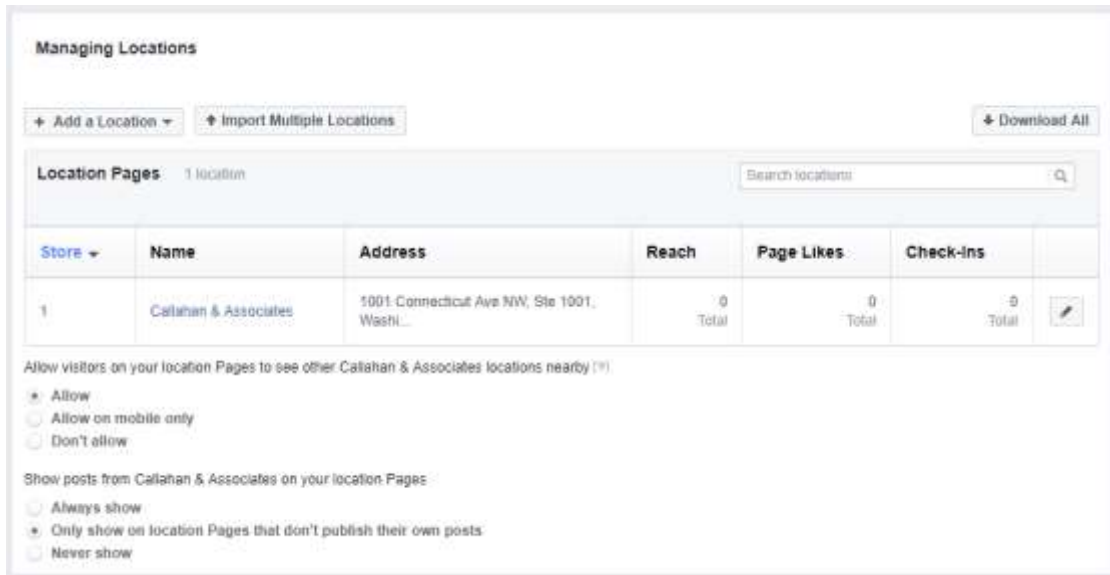
Callahan Tested: It took about 2 business days to receive an e-mail address we tested. You will get an e-mail through Facebook letting you know the page has been converted into a merged part of your main page. Once pages are merged, the old url will redirect to the primary page – this is how it will look:



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Step FOUR: Configure Your Locations

1. Once you have your Brand Page fully set-up, you can start adding in your child pages to the relationship! You can create new locations or add in pages that have already been created, such as those you claimed in Step Three.
2. Go to Locations under Settings – General, you’ll now be able to start creating branch-specific locations pages. Note that you’ve got the option for each branch and in general to choose to show posts and nearby locations. You can also add custom pictures and backgrounds to branch pages, if you wish.



3. **Add A Location** lets you create one branch page at a time. You can either choose from an existing page that you have claimed OR create a new one. You can also utilize the bulk upload functionality if you don't have claimed pages for branches already. This would be the base if you did NOT have valuable pages you didn't want to simply merge into the main page.
4. [The bulk upload instructions can be found here.](#) You've got the ability to download your location data with addresses from CUBrandMonitor, so this can be a very quick way to get all your branches set up quickly.

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3. Bing

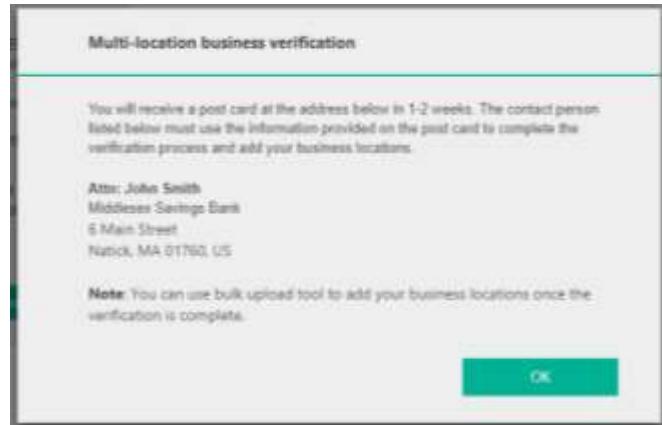
Bing is the second-most visited search engine on the Internet. If people aren't searching on Google, chances are, they are searching for your credit union on Bing (thanks to Microsoft setting work desktop computer homepages to Bing). The other benefit with doing Bing next is it is the process is simple. One thing to note is that Bing uses the reviews that come in via Yelp, so responses and any review flagging will need to be done via the Yelp platform.

Here are the steps to getting listed on Bing:

1. First, you need to visit: <https://www.bingplaces.com/> and hit "Sign in" in the upper right-hand corner
2. You will then be asked to sign into Bing or create an account – they give you the choice to sign in with one of the following: Facebook, Google, "work", or a Microsoft account. If your credit union uses Microsoft Office 365 it is straightforward to sign in with your work address in this way.
3. Once you are signed up, you will have to verify your account via the e-mail address you provided. The email comes through very quickly – if you don't see it shortly after you complete this step, check your spam filter or with your IT team as it may have been blocked..
4. Once you've verified, you'll need to go back to the Bing Places page <https://www.bingplaces.com/> and hit "Get Started."
5. You have two options here – to claim each branch separately, but almost instantly, or to claim them as a multi-location business and wait 1-2 weeks for a postcard verification. Both processes are outlined here:
6. **If you are looking to claim one branch, fill in the business information.**
 - When your business pops up, click "Claim Business," if it does not pop up, click "Create New Business and follow the steps."
 - You will have to sign in with your new Bing account from Step 2.
 - You will then be directed to a dashboard for your business.
 - To verify, click the "Verify" button on the dashboard
 - You will get several options to verify, either a PIN via e-mail, phone call or text. You can also hit alternative methods for mail.
 - The phone call verification is very easy, but email may be the easiest, depending on your call center and how calls are routed.
7. **If you want to claim all your branches at once:**
 - For Corporate Offices who clicked the "Chain" option:
 - Enter your contact information as shown at right:
 - Enter your headquarters information, as shown below:

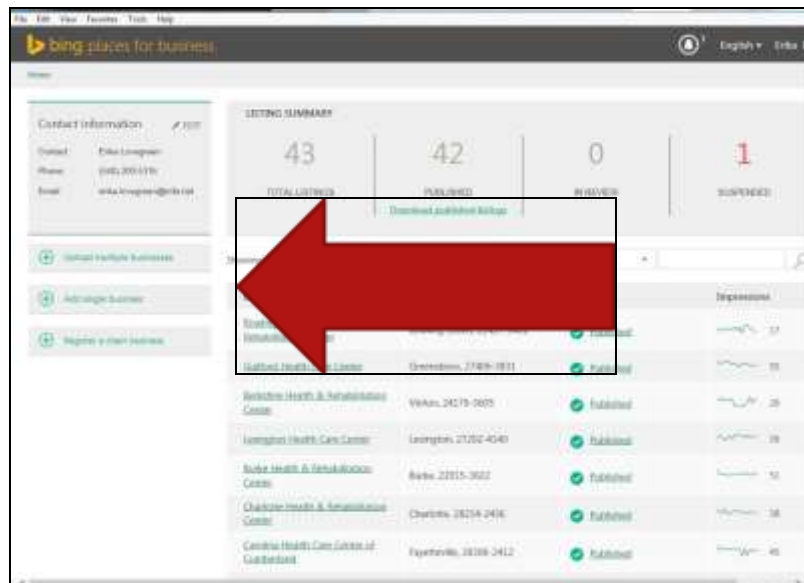
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- Confirm that you'd like to **Verify**.
- A pop up will open with information (see below) letting you know that a postcard with a PIN number has been sent and should arrive within 1-2 weeks. Once you receive it, you'll be able to complete the process and also take advantage of the option to do bulk information uploads



Callahan tested: Ours came within 1-2 weeks**

8. When you get the PIN number in the mail, it will have login information
9. Follow the steps to login and enter your PIN number
10. You will get to a dashboard with several bulk upload options



11. To bulk upload, you will fill out a spreadsheet to submit: [here is the link](#) if you are having trouble finding the Bulk Upload option:
 - a. Downloading the template is vital in this process
 - b. Once you have completed the spreadsheet, you hit upload
 - c. It may take a few days for all of your listings to appear

If you are having any issues with getting on Bing [go here](#), and you can message live with support.

Repeat all these steps with each of your branch locations.

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4. Yahoo

Yahoo is the Internet's third most popular search engine, so it needs to be up there on your business listing venture.

They do not make claiming easy, as their goal is to get you to buy paid listing management services through Yext.

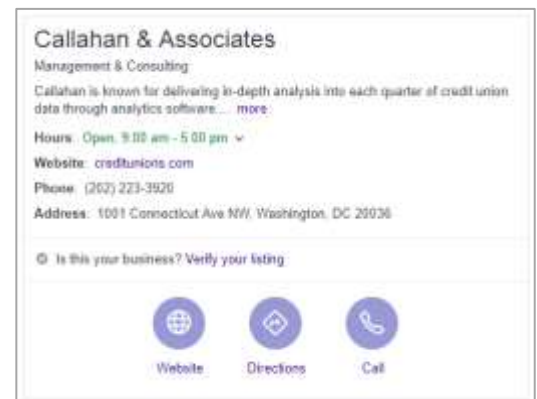
You can list for free, but it's a long process; they don't guarantee that it will be listed in a timely fashion.

Here's why: Yahoo for small business has become cumbersome and confusing. For example, if you used to subscribe to 'Yahoo Small Business', it has now changed to 'Aabaco Small Business', then, after announcing it took over a company called Luminare to manage small business, they are just absorbing Luminare though Aabaco (Confused? You're not alone!). If you are not a paying customer, they will re-direct you to Yext, and Yext will try to get you to pay for listing management in many ways, though there is a way to do it for free (again, not user-friendly or easy to locate).

There's only one thing that's important ... **here's how you can get a free local listing on Yahoo:**

How to Claim a Free Local Business Listing on Yahoo:

1. Go to <https://local.yahoo.com/> and search for your business listing first. If a page is already created you can see if it's already been claimed.
2. If a page already exists you can click "Verify your listing."
3. If a page exists and is claimed: if you don't know who at your credit union might have claimed this, you can still click "Verify your listing" and proceed with the next steps.
4. This is where things get tricky... You will see information regarding Yext. Yext is a "digital location management company that is a paid monthly service to manage your listings across multiple provider sites. Initially it seems as though your only option is to sign up and pay for money to manage a listing on your business, however, there are ways around it that take extra steps.
5. That link will take you to <http://www.yext.com/pl/yahoo-claims/index.html> (you can just go here directly if you prefer).
6. Enter your business information and click "Scan Now" – see below how we entered info for Callahan:



7. The pop up box will close and show a lot of listings details. Don't worry about all the other information showing on this page - just click the big "Continue" button.
 - Next, you can update the information about your listing. Complete this page fully - don't forget to use the same NAP (name, address, phone) that you use on other providers for this branch. This is very important!
 - Click the "Continue" button when you're done. Choose as many categories that apply – we recommend also choosing "bank" in addition to credit union – so you can compete with local institutions fully.

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- Yext will then present you with four paid plans, but immediately below these plans is a tiny link that says, "Claim your Basic Listing only on Yahoo" ... click that link

YAHOO! | yext

Select Your Plan

Join over 150,000 businesses just like you and correct your listings across the internet.

PLAN BUILD FIX CHECKOUT

	Essential Plus Package	Complete Standard Package	Premium Advanced Package
Original Price:	\$10/week	\$10/week	\$10/week
Current Price:	\$9/week	\$10/week	\$19/week
Billed at:	\$449 Annually	\$469 Annually	\$229 Annually
Optimization Rate!	82%	100%	100%
Add Your Listing to the Following Sites	<ul style="list-style-type: none"> Yahoo Google Facebook Bing Apple Yelp WhitePages MapQuest Superpages Citysearch Local.com Foursquare 	Full Essential Package <ul style="list-style-type: none"> 35+ Emerging Sites 	Full Complete Package
Additional Features:		PowerListings+ PowerListings+ allows you to publish Products, Services, Calendars, Staff Bios and Menus around the web!	Review Monitoring Keep track of the ratings and reviews your customers post on your online listings. \$300 Value!
Analytics:		Track profile views by partner to see which specials drive the most traffic.	Yext Pages Yext Pages lets you add all of your enhanced content to your website! \$300 Value!
PICK PLAN	PICK PLAN	PICK PLAN	PICK PLAN

Includes Listing on Yahoo

Includes Listing on Yahoo

Includes Listing on Yahoo

Includes Listing on Yahoo

Claim your Basic Listing only on Yahoo.

- Per Yext/Yahoo: "The Yahoo business claim allows you to update the name, address, phone number, email, category, and website for your business. *Verification is required. You will receive an email shortly with instructions. *To immediately claim your business, select one of the power listings (aka paid listing subscription)*" - see screenshot below
- You're now at the "Yahoo Basic Listing Checkout" page. Complete the checkout and click "Place Order" (it's free). Enter your business information in the form provided.
 - Yext will send you an email to verify your email address. Click the link, create a password, then login to your account.

Reply to: 222222@yext.com

yext

Dear [Name],

Thank you for creating your Yext account!

Please click the button below to confirm your email address and activate your account.

[Confirm Email](#)

In the future, you can log into your account by going to www.yext.com/yextlogin

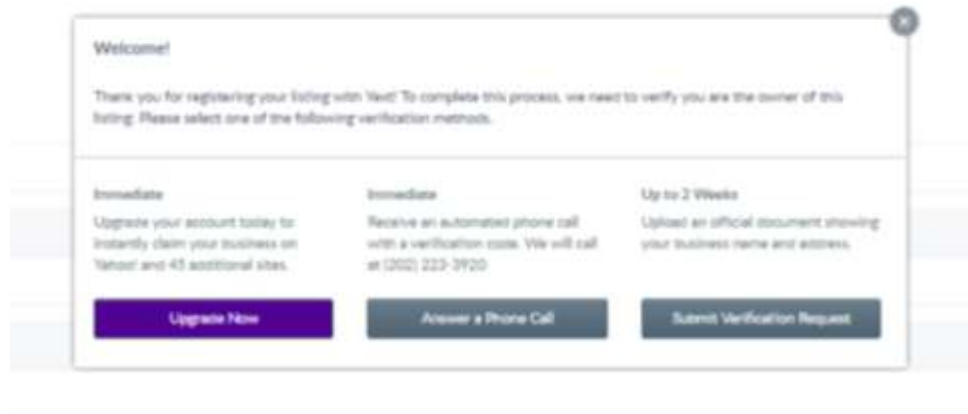
Your username is: Email@yourmail.com → email you provided

Welcome to Yext!
Yext Team

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4. The final step is to verify you represent this business. The easiest method is to have them call you, but there are other methods as well.
5. Again, it will ask if you want to immediately verify by upgrading to a paid subscription, or give you the option to verify via an automated phone call or by submitting an official document containing the name and address of your business, which verification could take up to 2 weeks.

A Yext representative ([Raj Nijjer](#)) says that “Note that the free basic listing can take upwards of 30 days to publish/update and only include basic NAP attributes.”



Callahan Tested: We chose the “Answer a Phone Call” option to the business address. We immediately received a call and given a verification code and were able to successfully confirm our listing. We realize that call/contact centers do sometimes present insurmountable difficulties in verifying via phone call. We are currently working with listings providers to achieve a work-around, but for the time being the mail / postcard verification is the primary sole alternative.

Repeat all these steps with each of your branch locations.

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5. Yelp

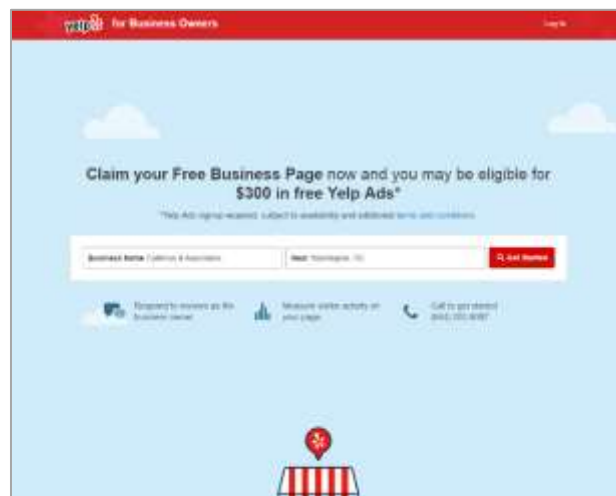
Yelp has been growing quickly in the online world, mainly for its customer-driven review functionality. Many credit unions may be surprised to find themselves listed on Yelp - with pictures. This is because members can create pages for locations if they do not already exist.

Here are the steps to getting listed on Yelp:

1. Navigate to <https://biz.yelp.com/support/claiming> which gives an overview of the process for claiming your business. Claiming a yelp business is a very straightforward process, provided your listing telephone number is correct. Choose Claim Your Business



2. Type in the name of your business on this page:



There are three possible scenarios for this branch – follow the steps for your situation:

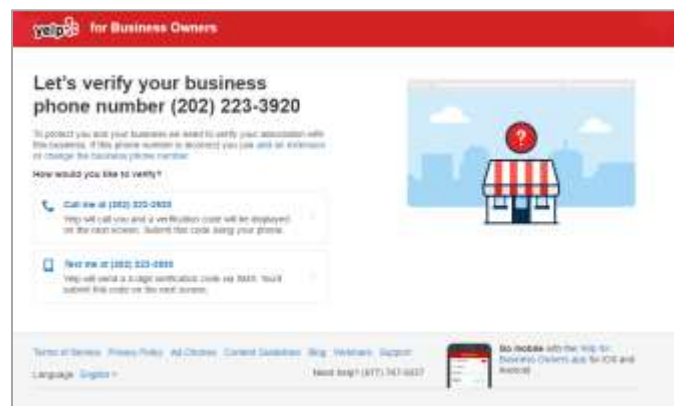
1. Your branch is there and ready to be claimed – go to Step 3
2. Your branch is there and already claimed – go to Step 4
3. Your branch is not there at all – go to Step 5

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3. If you found it and it has not been claimed click on **“Claim This Business”**



- The next screen will prompt you to select the way you'd like Yelp to contact you to verify that you own the listing. Unless you can receive texts to the branch phone number (rather unlikely...), choose the **Call me at...** option – *note that you have the ability to add an extension*, which means the verification call can be routed directly to you as needed.
- When you select the Call me option, a new screen will appear with a code. When the phone rings, you will be asked to enter that code. Immediately, your screen will refresh and confirm that you've claimed the listing!



4. If it says **it has already been claimed**, call this number: (877) 767-9357 (Yes, they will try to sell you advertising, reiterate that you just want to clean up your listing first).

- The line will say you've reached Yelp Advertising - after providing your language choice, you'll be routed to a real live human being. You'll be asked to provide your phone number from the listing.
- Explain to them that the person who claimed the listing is no longer at the credit union and you need to claim it. They will ask you to email them from your credit union official email address (the support rep will give you their contact details – not a list, but their work address!) and state:
 - “Hello, This is First Name Last Name, my email address is first.last@yourcreditunion.com, the person who previously ran our Yelp account is no longer with the business, please add me as the account contact.” They will enable reclaiming and email you back directly with confirmation that you can officially claim that branch.

5. If you could not find your business, click **“Add Your Business to Yelp”** .

- Fill out the form with your business information and then click “Add Business”.
- You will be sent an e-mail to confirm the listing.
- The e-mail will bring you back to Yelp where, you need to click through to see your business.
- You will not be able to officially claim the business as your own until it populates on search results, which can take 1-5 days according to a Yelp specialist we spoke with.

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- After that time, you will need to create a Yelp Business Owners Login.
- To find it, go to your listing and at the VERY top of your screen, you will see a red flag that says “Go to Yelp for Business Owners,” click on it



- Click the **Login** option at the top of the Yelp for Business Owners Page. Follow the steps to create a Yelp Business Owners Account
 - After creating the account, call (877) 767-9357, if you hang on the line you will get a LIVEPERSON!
 - Explain to them that you want to link your newly created business listing with your business account.
 - PLEASE NOTE: If you have fewer than 10 locations, Yelp creates for you a Local Business Manager Account, if you have more than 10 locations, you need a National account (depending on who you talk to, they call it different things).



- **Callahan Tested:** When originally going through this process, when we hit the 10 business location threshold, Yelp literally paused our account and gave us a number to call. They will insist on selling you advertising. The only way we could get around this was to convince them that we were not in charge of marketing, but in charge of cleaning up business listings. We told them we would work on getting them a meeting with our marketing team if they could help us out. That meeting never happened, but we did get the National Business account we needed.

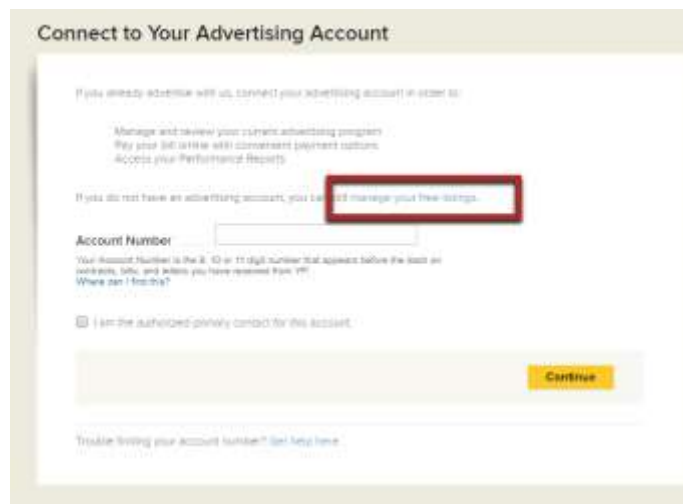
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6. Yellow Pages

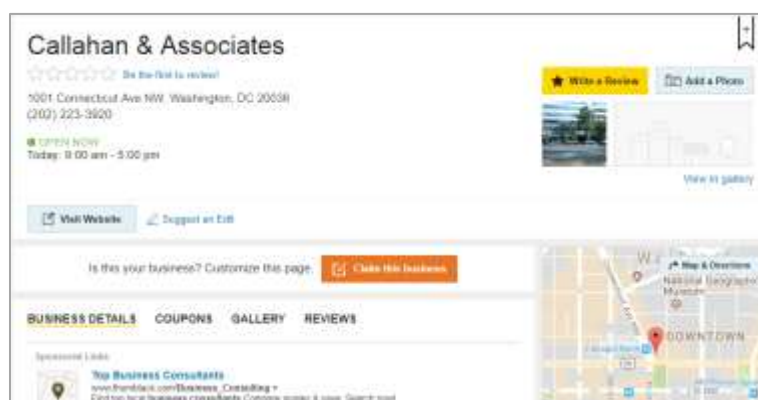
Yellow Pages is finally getting onboard with the online world. With millions of searches daily, they have a pretty easy platform to work with. No bulk upload option if you are a Corporation or Agency. Outside of the major time commitment for bigger businesses, listing with them is pretty easy. They did tell us if we purchased advertising they would entertain a bulk upload.

Here is how to get listed on Yellow Pages:

1. You need to create a YP account – [here is the website to create one](#).
2. Once you're logged in, you'll be on a page that asks you to connect to your advertising – you don't need to do this – look for the small print above the Account Number field that says If you do not have an advertising account, you can still manage your free listings – click this link.



3. You can add listings here, but we found that the easiest thing to do is to go to yellowpages.com and search for a branch location. Click into the listing for that branch and click the orange **Claim this business** button.



4. Once the next page loads, it will ask you to do a phone verification – they'll call you at the number shown on your business listing. Click Start and that will trigger the phone call – you'll need to enter a code that is displayed right on your screen.

Claiming Your Branch Listings

Verify Listing

Your listing will not be displayed on YP.com until you have completed verification.

- We'll need to verify your listing, so we know you represent the business (and not its competitor).
- Verification helps us publish your listing faster, usually within 1-4 hours.

Phone Verification

We will call the phone number on your business listing: (202) 223-3920. When you answer the phone, listen to the instructions and type in the code you will be given. Our call will show as (800) 343-7390 on your caller ID.

Click Start when you are ready.
We do not recommend cancelling this step. Your listing will not go live if you do not verify.

Cancel **Start**

5. If your business exists, it will give you a screen to select it to claim, if not, you will move onto the verification page.
 - If it's not the correct phone number, call the number give (806) 570-8863 and a LIVE PERSON will help you out.
6. If it was the right phone number, click "select".
7. Next, you will be at the phone call verification step.
 - **Callahan Tested:** You must make your call center aware that the other line is going to start ringing, give them the code, and hang up. After a few tries, we got the hang of it, but this process happened really quickly. If you are concerned about whether it will be possible for the call center to handle getting this code, we suggest calling the (806) 570-8863. The support team went ahead and verified a listing for us when we had an automated phone answering system that would not take their calls.
8. Once your account has been set up and businesses verified, if you are not directed to your Dashboard, go back to the sign in page. Sign in to get to your Dashboard.
9. You will see the word "Tools" across the top of the screen. That is where you can access your listings to manage in future.

Claiming Your Branch Listings

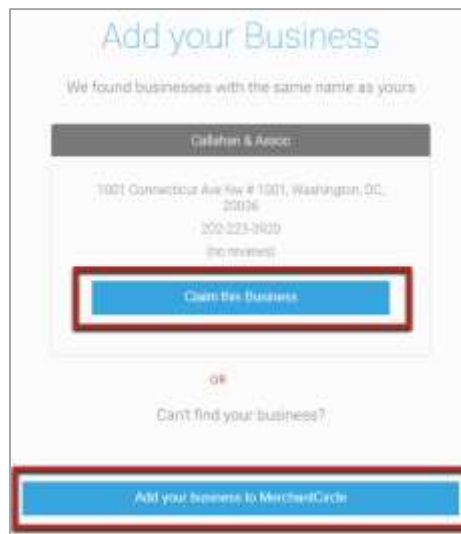
7. MerchantCircle

MerchantCircle is an online directory that helps small businesses connect with local consumers. They offer free marketing tools. Not the highest priority as far as business listings are concerned, but they are hyper-local and by listing your credit union, their data becomes available for other sites to harvest it and potentially re-list you using the information they have – correct or incorrect.

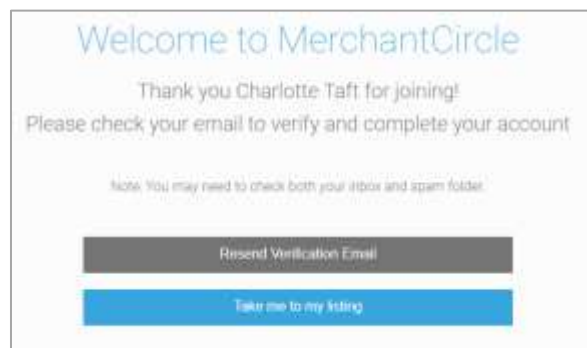
There is no bulk upload option, so you have to load each business individually. It is very time consuming, and can be done at a lower priority than the other providers we covered here.

Here is how to get listed on MerchantCircle:

1. Go here: <https://www.merchantcircle.com/signup?#step=stepOne>.
2. Fill in your information – this creates an account for you and takes the branch information.
3. **If your branch does not exist in their system**, it will have you fill in your address, phone number, and business category – *if it does exist, skip down to step #4.*



- Enter the branch-level information and add category and business description selections.
- The next page will – guess what! – try and get you to pay. Select the **TRY IT FREE** option – then choose the small text that says SKIP on the bottom of the next page, where they try to sell you yet more advertising.



- They immediately send you a verification email. Be sure to check your spam mail folder.
- Once you click the link in the email, you're verified and ready to update the listing.