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1. Scoring

Snapshot => Overall Score (Gauge in top right) => Click on #
Workflow => Report Dropdown (on left) => Store (Branch) Comparison

Performance Scores	Overall ↕	Reviews ↕	Chatter ↕	Search ↕
Middlesex Savings Bank, 291 Main Street, Acton, MA, 01720, US	39	<u>47</u>	<u>17</u>	<u>54</u>

A proprietary algorithm determines your overall score. After thousands of web pages are searched and analyzed looking for your business information, we measure your results, compare them with your industry and local competitors in your area and assign an *overall* score (out of 100). Factors such as listings found, rankings, reviews, and social media can be important factors, depending on your industry.

For more information, refer to our Scoring Guide.

2. Top 4 Search Sites in the US:

1. Google Places
2. Yahoo! Local
3. Facebook
4. Bing Places

3. Create New Users

My Account => Manage Users => Add New User
Admin: Parent
Standard: Child

4. Add a New Location

My Account => Manage Locations & Competitors => Add New Location (button)
Fill in as completely as possible (even FB/Twitter links)

5. Remove a Location

My Account => Manage Locations & Competitors => Uncheck Locations => Click Save
Any locations that were unchecked will be removed from the system.

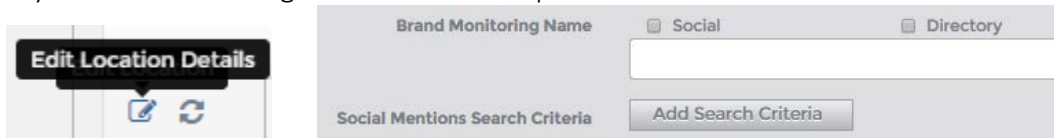
6. Generate Branch Monthly PDF Report

Snapshot => View One Location

Under our score gauge on the right below “Summary Reports” you’ll see the monthly store (branch) reports

7. Refine Matching/Store (Branch) Monitoring Name

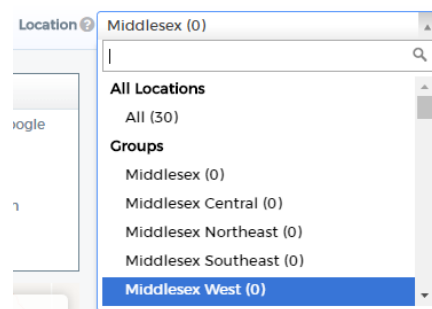
My Account => Manage Locations & Competitors => Edit Location Details



You may notice a lot of irrelevant social mentions. You can add search criteria to help refine the results.

8. Add a Group

My Account => Manage Groups => Create New Groups



9. Generate a Local Brand Visibility Report

My Account => Manage Groups => LBV Report

Create a group for a location or multiple locations and after completion a link will appear under LBV Report column

10. Export Charts and Information

 is located next to each chart to allow you to export the image to a PNG file.

 **Download** allows you to export info to a csv/excel document

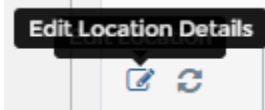
11. Change a Competitor

My Account => Manage Locations & Competitors => 

Max of 5 Competitors

12. Create Email Alerts

My Account => Manage Locations & Competitors => Edit Location Details => Email Address



13. Edit Email Alert Content

My Account => Manage Locations & Competitors => Check Boxes

Review Alerts	Chatter Alerts	Blog Alerts	PDF Reports
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

14. Local vs Web Rankings

Local = Map Sites (i.e. Google Maps, Bing Maps, Yelp, etc.)

Web = Organic Search (i.e. Google.com, Bing.com, Yahoo.com)

15. Change Ranking Keywords/Proximity

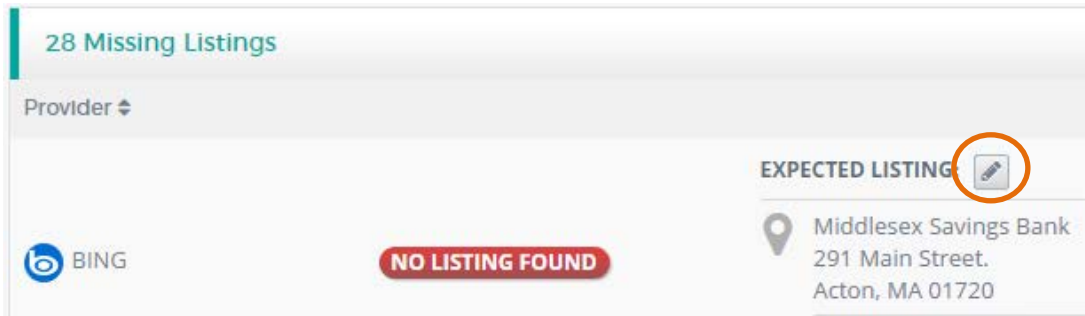
My Account => Manage Locations & Competitors => Edit Location Details => Scroll to bottom

Keyword	Local Area	Remove
Auto loan	Wayland, MA	<input checked="" type="checkbox"/>
Best loan rate	01778	<input checked="" type="checkbox"/>
Bank	Downtown Wayland	<input checked="" type="checkbox"/>

- Use towns, zip codes, neighborhoods to replicate potential member searches
- Keywords should reflect common industry search terms

16. Add URL for Missing Listing

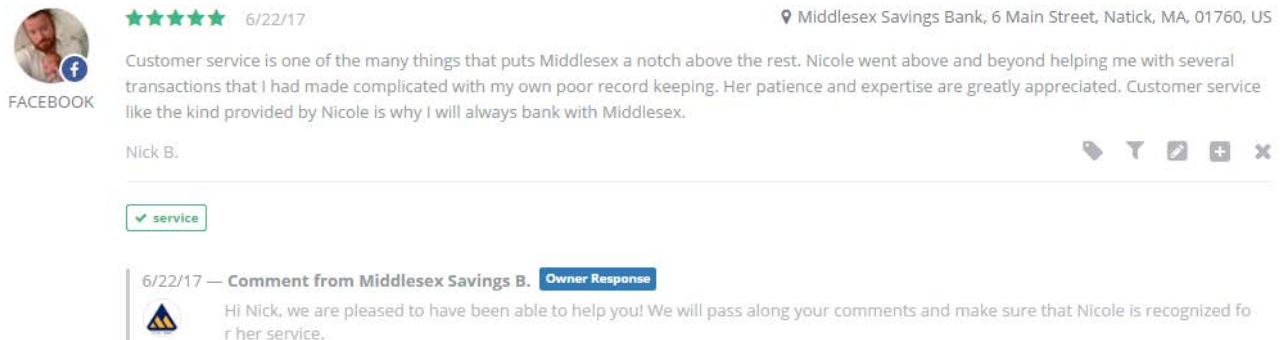
Listings => Missing Listings => Edit/Add URL



17. Respond to a Review

The icon is linked to where the review was placed on the review/search site. From there you must verify ownership (if you haven't claimed the listing yet) through phone or postcard and then you will be allowed access to respond* and even update all the branch info.

**Check with your manager for proper response approval best practices.*



18. Listing Accuracy

Order of Importance: Branch/CU Name => Phone # => Zip Code => Address

*Need verification of ownership (phone or postcard) to update listing page contact info