# Marketing Operations Manual

# Marketing Program Overview

The following is a summary of the existing marketing programs/activities at Stuart (as of March 2021). This list is subject to change based on available staffing, budget, and resources.

## MARKETING OPERATIONS

- Set/Manage department budget (annually/monthly) HSBC- greenlerc - Sabbott454 / P3091 / LD7048
  - Located at Dropbox > Marketing > Admin > Marketing Budget
- Manage Marketing Dropbox account
  - Username: cgreenler@stuartrental.com (secondary stu@stuartrental.com) / Password: Sabbott454!
- Manage/administer Zoho products for marketing
  - Zoho CRM, Zoho Social, Zoho Campaigns, Zoho Projects
  - Username: stu@stuartrental.com / Password: Park845!
- Manage Marketing-related external paid accounts:

| **Account/Service** | **Vendor** | **Username** | **Password** | **Paid** |
|---|---|---|---|---|
| Search Engine Marketing (SEM) | ReachLocal Inc. | cgreenler@stuartrental.com | Milpitas454 | Per cycle |
| Search Engine Optimization (SEO) | Snap Digital Media | N/A | N/A | Monthly |
| Website Hosting* | Cloudways.com | stu@stuartrental.com | Milpitas454 | Monthly |
| Web SSL Certificate* | DigiCert | stu@stuartrental.com | Milpitas454 | Annually |
| WP YITH Frequently Bought Together Plugin* | | | | |
| Website Email* | Sendgrid | stu@stuartrental.com | Milpitas454 | Monthly |
| Wordpress | Wordpress | See Website section below | | N/A |
| Venedor Web Theme* | Envato Market | stuarteventrentals | Sabbott454! | One-time |
| InstantSearch+ Top Pro* | InstantSearch | Unknown | Unknown | Annually |
| WP All Import Plugin* | WP All Import | stu@stuartrental.com | Sabbott454! | One-time |
| **These accounts are paid for by Stuart but administered by Paul Hopper/Snap Digital Media* | | | | |
| Adobe Creative Suite | Adobe | stu@stuartrental.com | Sabbott454! | Monthly |
| (2 subscriptions) | | cgreenler@stuartrental.com | Sabbott454 | Monthly |
| Marketing Dropbox | Dropbox | stu@stuartrental.com | Sabbott454! | Annually |
| (2 subscriptions) | | gpaz@stuartrental.com | Sabbott454! | Annually |
| CRM | Zoho CRM | stu@stuartrental.com | Sabbott454! | Annually |
| Email Campaigns | Zoho Campaigns | stu@stuartrental.com | Sabbott454! | Monthly |
| Social Media | Zoho Social | stu@stuartrental.com | Sabbott454! | Annually |
| | Later App | stu@stuartrental.com | Sabbott454! | Monthly |
| Project Management | Zoho Project | stu@stuartrental.com | Sabbott454! | Annually |
| Broadly Email Surveys | Broadly.com | mkubitz@stuartrental.com | Sabbott454! | Annually |
| USB Flash Drives | Proforma Albrecht | *Contact stacey.steele@logolabpromo.com* | | Annually |
| Bing For Business | Bing Browser | cgreenler@arenaamericas.com | | |
| Google Drive/Google My Business | Google | stu@stuartrental.com | Milpitas454 | N/A |
| Yelp Listings/Advertising | Yelp for Business | mpringle@stuartrental.com | Milpitas454 | Monthly |
| Social Media Accounts | Instagram | Stuarteventrentals | Sabbott454! | N/A |
| | *Williams IG | williamspartyrentals | Sabbott454 | N/A |
| | Facebook | stu@stuartrental.com | Milpitas454@@ | N/A |
| | Twitter | stu@stuartrental.com | Milpitas454 | N/A |
| | Google+ | stu@stuartrental.com | Milpitas454 | N/A |
| | Youtube | stu@stuartrental.com | Milpitas454 | N/A |
| | Pinterest | stu@stuartrental.com | Milpitas454 | N/A |
| | Nextdoor | stu@stuartrental.com | Milpitas454 | N/A |
| | | | | N/A |

| | | | | |
|---|---|---|---|---|
| | Wedding Bean | | Sabbott454 | |
| | Milpitas | Marketing@stuartrental.com | | |
| | San Jose | stu@stuartrental.com | | |
| | Dublin | cgreenler@stuartrental.com | | |
| Printed Materials (e.g. bus. cards) | Proforma Albrecht | stu@stuartrental.com | Milpitas454 | As needed |

= Currently recommended to be closed and no longer used.

## MESSAGING/BRAND DEVELOPMENT

- Customer avatars; targeted value propositions; sales messaging templates
  - Located at Dropbox > Marketing > Sales Messaging
  - Sales messaging templates also located at Dropbox > Sales Templates
- Company branding (logo, corporate fonts, etc.)
  - Located at Dropbox > Marketing > Branding

## WEBSITE

- Use Wordpress to manage site
- Add/update/remove products and update pricelist (as needed)
- Add store closure notices (as needed)
- Oversee SEO Consultant activities (performed by Paul Hopper/Snap Digital Media)
- Create special landing pages (e.g. Stanford Tailgates, SJ Earthquakes rentals)
- Update homepage slider (as needed in coordination with Paul Hopper)

## SOCIAL MEDIA

- Use Zoho Social to manage postings
- Post content(daily)
- Post event recap/photos & tag others (as provided from Sales team)
- Respond to Stuart mentions (daily)
- Respond to client requests/questions (daily)
- Share external related content (as opportunity arises)

## EMAIL

- Run Alert custom report ‘slsp’ (daily)
- Upload Email/First Name/Last name to Broadly online dashboard (daily)
- Add new customer emails to Email Database (daily)
- Add individuals who sign up for Stuart Newsletter online to Email Database (as needed)
- Create and send email targeted email blasts via email campaign tool (as needed)

## NEW PRODUCTS

- Name new products
- Photograph new products (for web & email)
- Add products to website & price list
- Create product style sheet when appropriate
- Announce to Sales and Customer Support
- Promote via social media & email

### SALES SUPPORT / PRINTED MATERIALS / ADVERTISEMENTS & SPONSORSHIPS

- Create/update sales support materials as needed and per request from Management/Sales (e.g. sales sheets/folders, look books/style sheets, customer presentations, gift certificates, printed/email promotions, networking event materials, RFP responses, etc.)
- Evaluate and make recommendations on advertisement/promotion/sponsorship opportunities
- Manage marketing side of corporate partnerships (e.g. SJ Earthquakes, Stanford Athletics)
- Create/update advertisements & promotions per request from Management/Sales
- Create discount codes in Alert & communicate internally
- Update price list & post on website
- Create and/or order standard printed materials:
    - Business cards as requested (from Proforma Albrecht)
    - Holiday cards and customer gifts in early fall
    - Construction postcards in fall
    - Envelopes and letterhead as requested by Finance
- Order Operational building signage, posters, stickers as requested
- Design/order branded & promotional items
- Manage Dropbox folders accessible to the Sales team:
    - Tent, Flooring, Pipe & Drape, Lighting (event photos)
    - Sales Sheets & Marketing Resources
    - Sales Templates
    - Photos to be Filed
    - Event Photos

### PHOTOGRAPHY

- Photograph new products
- Photograph merchandising shots
- Photograph events (using standard camera and/or drone)

### INTERNAL COMMUNICATIONS

- Assist with internal projects as requested

# Website

## Basic Information

URL: https://www.stuartrental.com/
Webmaster / Developer / SEO Consultant:

Paul Hopper, Snap Digital Media, paul@snapdigitalmedia.com
Toll Free (888) 892-6632 / Mobile (803) 727-6900 / Fax (877) 868-1934
*Paid $1,500/month plus any extra expenses when extra work is required by Stuart*

Wordpress Admin Site: http://www.stuartrental.com/wp-admin/
Wordpress Administrator Accounts: Username / Passwords (as of 04/09/21):

**NAME: WP Username / Password**
**Paul Hopper**: Snap Webmaster / N/A
**Michael Berman**: Michael Berman / j9QP(CfBM1HCD&W6EQqGbn7j
**Broadly**: Broadly / YQbmve00S*@#BdiE@NaeKP3o
**Volatile Studios**: Volatile / PZMcDIDp&IWo1Ktzv28^a!d%
**Carrie Greenler**: Carrie_G / *K3FgcTGUtOa2Y1X#8ajW^xK
**Gregg Paz**: Gregg_P / uVtOsL26Ev(SpXfX02bo%3x5

Website Hosting Provider: Cloudways (administered by Paul Hopper/Snap Digital Media)
- We pay monthly charge that varies based volume of site usage (averages $65/month); currently charged to Carrie Greenler HSBC

Website Email Provider: SendGrid (administered by Paul Hopper/Snap Digital Media)
- We pay a flat monthly charge of $9.95; currently charged to Maria Kubitz AmEx

SSL Certificate Provider: DigiCert (administered by Paul Hopper/Snap Digital Media)
- We pay an annual charge of $175; currently charged to Maria Kubitz AmEx

Theme: Venedor + WooCommerce plugin (for product listings and online shopping cart)
- Security updates administered by Paul Hopper/Snap Digital Media

## Additional External Website Contacts

**Alert / WooCommerce Shopping Cart Plugin:**
*This plugin allows the shopping cart on the website to communicate quote requests to Alert*
Volatile Studios
Direct: 562.424.2744 / Fax: 562.424.6616
Contacts: Robert R., robert@volatilestudios.com / Ortenzio Moraca, ortenzio@volatilestudios.com

**Automatic Online Review Feeds:**
*This plugin automatically pulls positive reviews from Google, Yelp and Broadly and puts them onto the appropriate location/showroom pages on the Stuart Website.*
Broadly (https://broadly.com/)
Account Rep: Heather Faggiano, Customer Success Manager, heather@broadly.com, (800) 727-0445
Primary Support Contact: Stephanie Perry, stephanie@broadly.com, 800-693-1089
General Support: support@broadly.com

**Search Engine Marketing (SEM):**
*Provides search engine ads in varying categories and local geographic areas to drive traffic to our website as well as calls to our business.*
ReachLocal (http://www.reachlocal.com/us/en)
Account Rep: Kim O'Rourke, Internet Marketing Consultant, kim.orourke@reachlocal.com, 408.544.0916
Technical Rep: Aaron Briggs, Marketing Expert, aaron.briggs@reachlocal.com, 972.590.5041
*Notes:*
- *Stuart pays $3,500 per billing cycle which averages once per month (occasionally twice a month); currently charged to Carie Greenler HSBC.*
- *When adding or removing pages (not products) from the site, notify Kim and Aaron to reindex the site.*

## Website Instructions

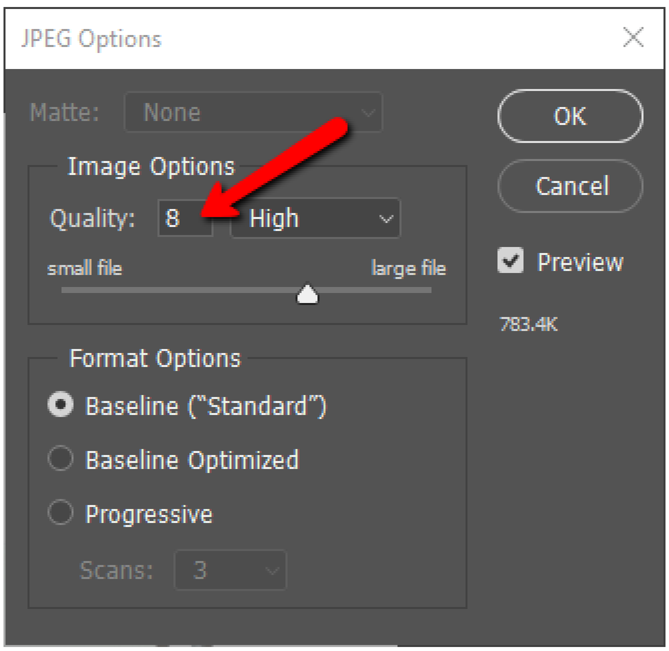
### Adding New Products

In WooCommerce, Stuart products fall into two categories:

1. **Products with variations**: products that have multiple pieces or sizes including china, flatware, and linen.
2. **Products without variations**: everything else.

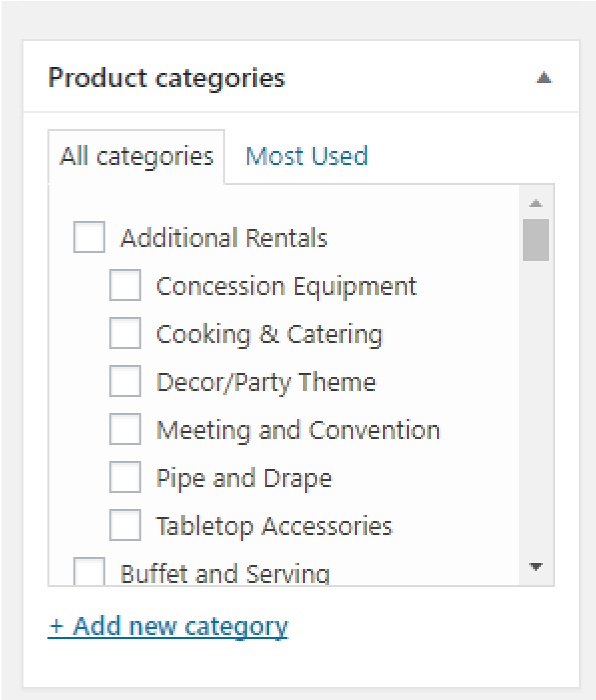
#### Adding Products With Variations

1. Prepare the product image(s) for uploading to the website.
    a. Vertical images should be 8” x 12” (576px x 864px) 72dpi
    b. Horizontal images should be 12” x 8” (864px x 576px) 72dpi
    c. Save product images as a JPEG file and in Photoshop’s JPEG Options, set the **Image Options Quality** to **8/High**

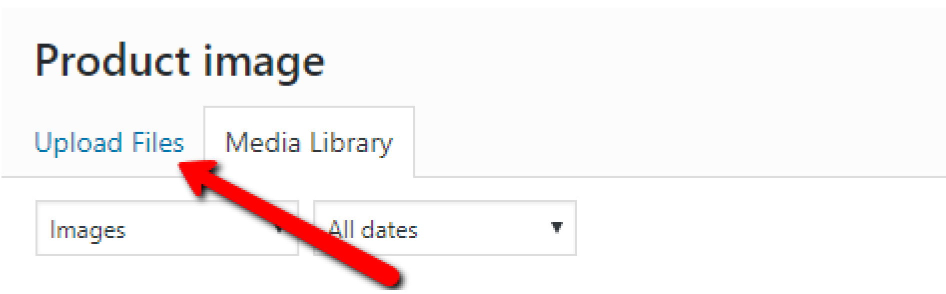



2. From the WordPress dashboard left-hand navigation, select **Products** > **Add New**.
3. Fill in the **Product name** field in the resulting **Add new product** screen.

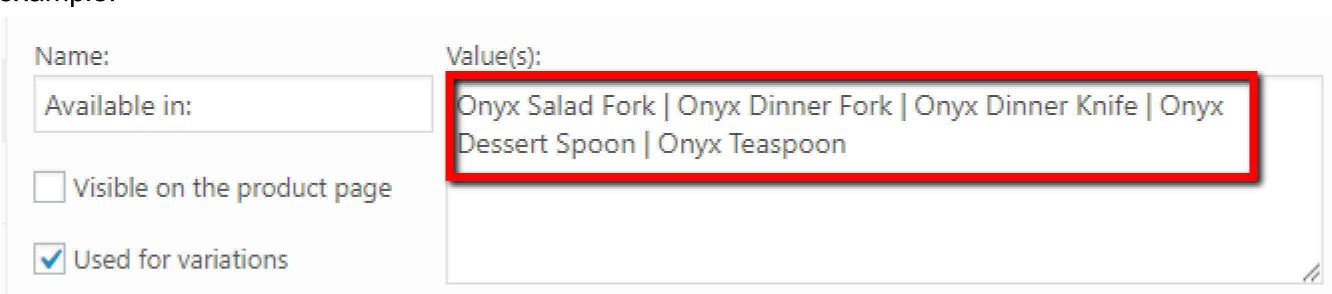
4. Check all the appropriate boxes in the Product categories widget.




5. In the **Product image** widget, click on **Set product image** > click on the **Upload Files** tab (see image below) > add the pre-formatted product image (step 1) > click on the **Set product image** button

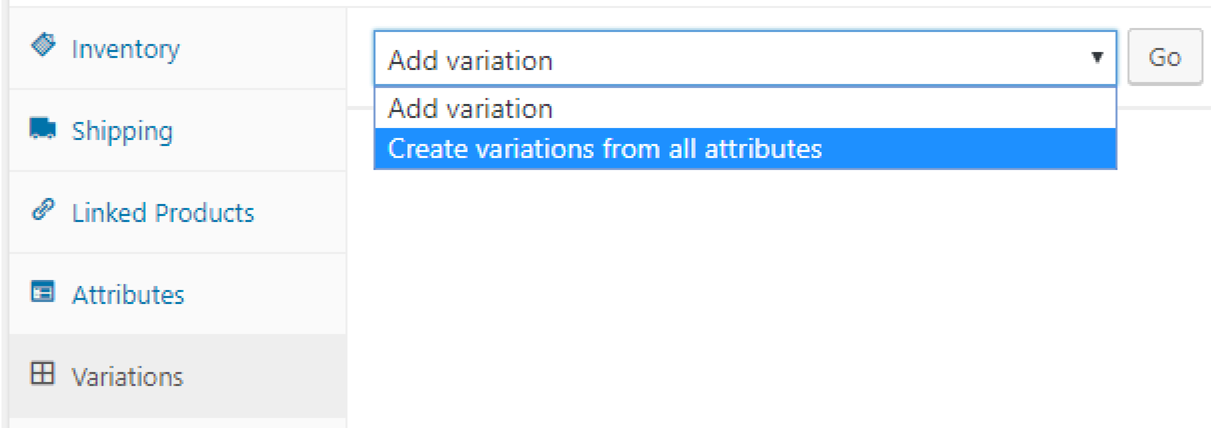



6. (Optional) If there are additional product images to upload, add them via the **Product gallery** widget.
7. Scroll down to the **Product data** widget and select **Variable product** from the drop-down menu.
8. Leave the **SKU** field blank and go to the **Attributes** tab.
9. Click **Add** next to **Custom product attribute** and in the expanded options type **Available in:** in the **Name** field.
10. In the **Value(s)** field type the names of the variations with **|** (shift-backslash) in between the names; for example:

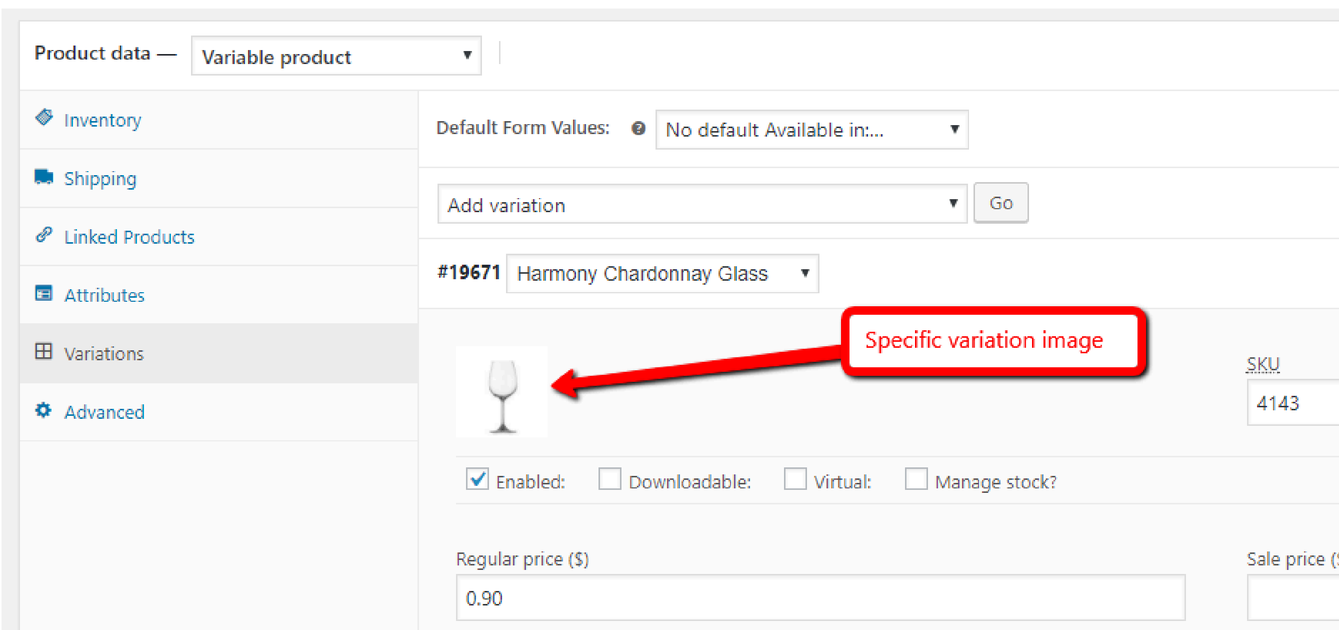



11. Uncheck **Visible on the product page** and check **Used for variations** (example above).
12. IMPORTANT: click on the **Save attributes** button.

13. Click on the **Variations** tab and click on the down arrow to the right of **Add variation** to select **Create variations from all attributes** and click **Go**.

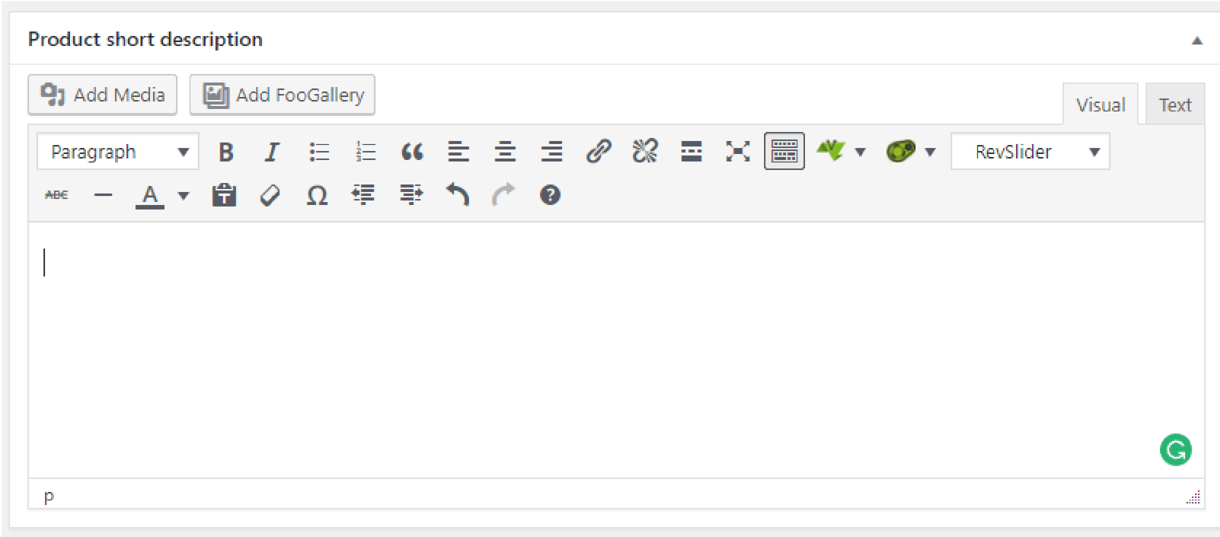



14. A dialog box will pop up that asks if you're sure you link to all variations > click **OK** > click **OK** again when a new dialog box says the variations have been added.
15. Expand the resulting variations by clicking in the empty space to the right of its name.
16. For each variation, enter the RC# in the **SKU** field > enter the price in the **Regular price ($)** field > (Optional) add a picture of the variation by clicking on the **image icon**, uploading a photo and clicking **Set variation image**.

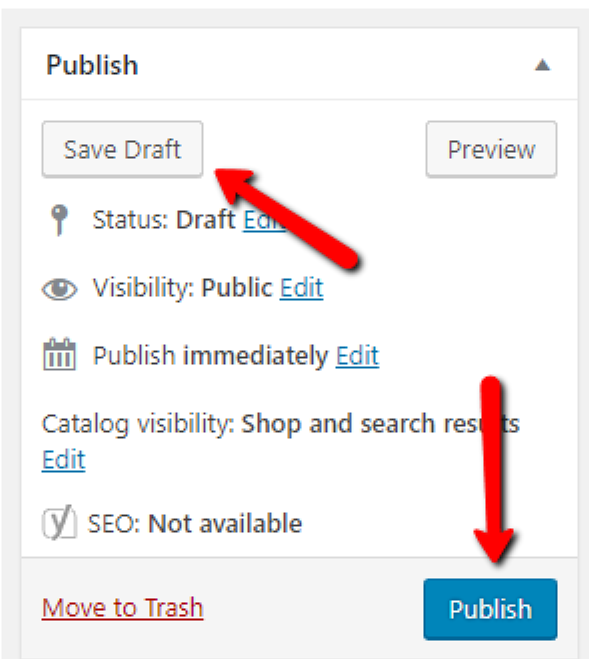



17. Click on the **Save changes** button at the bottom of the last variation.

18. (Optional) If there is any description, note, or dimensions to add, write them in the **Product short description** widget.



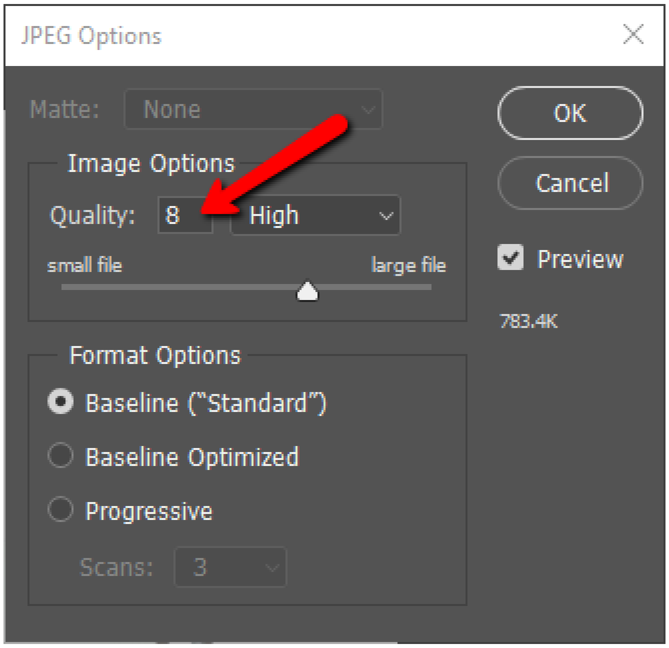

19. **IMPORTANT:** When all the product data is filled in, scroll to the top of the page and in the Publish widget, either press the **Save Draft** button if you are not ready to publish or the **Publish** button if you are. NOTE: if you navigate away from this page before pressing one of those two buttons you will lose all your work and have to create a new product from scratch.



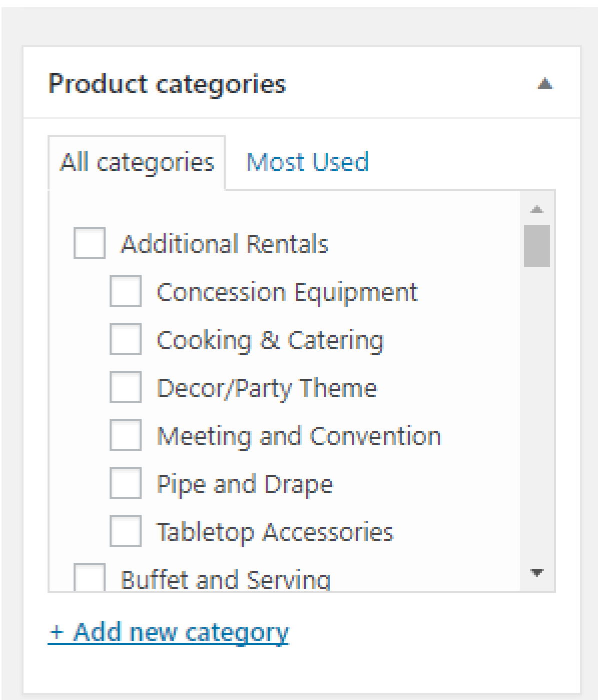

### Adding Products Without Variations

1. Prepare the product image for uploading to the website.
    a. Vertical images should be 8” x 12” (576px x 864px) 72dpi
    b. Horizontal images should be 12” x 8” (864px x 576px) 72dpi

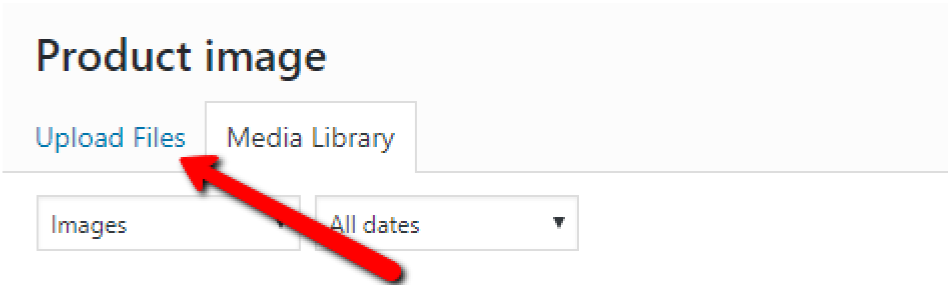
c. Save product images as a JPEG file and in Photoshop's JPEG Options, set the **Image Options Quality** to **8/High**



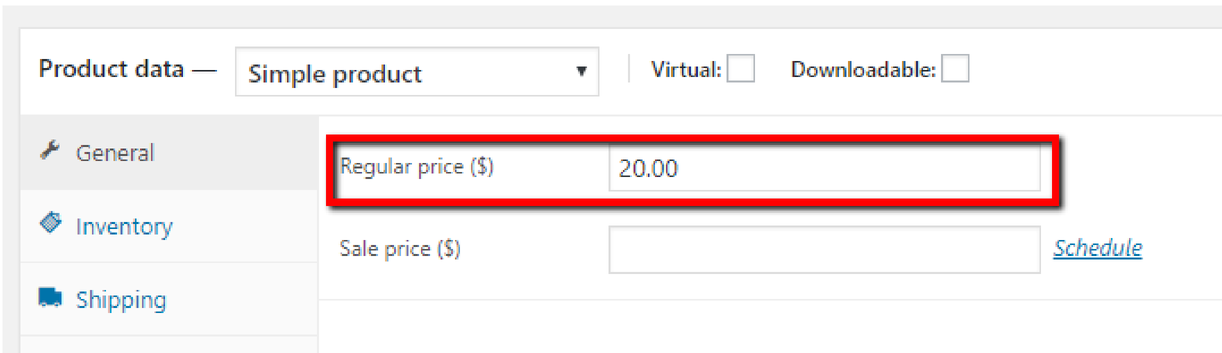

2. From the WordPress dashboard left-hand navigation, select **Products** > **Add New**.
3. Fill in the **Product name** field in the resulting **Add new product** screen.
4. Check all the appropriate boxes in the Product categories widget.



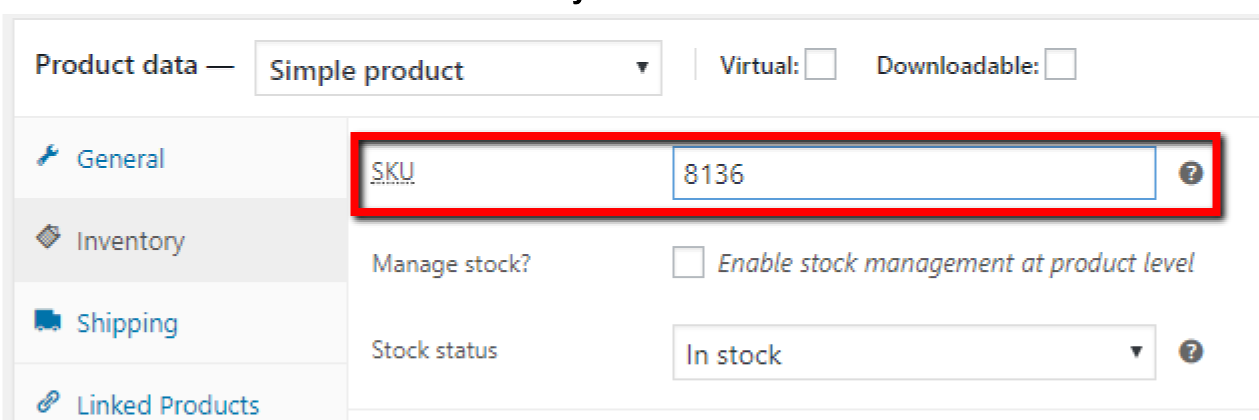
5. In the **Product image** widget, click on **Set product image** > click on the **Upload Files** tab (see image below) > add the pre-formatted product image (step 1) > click on the **Set product image** button



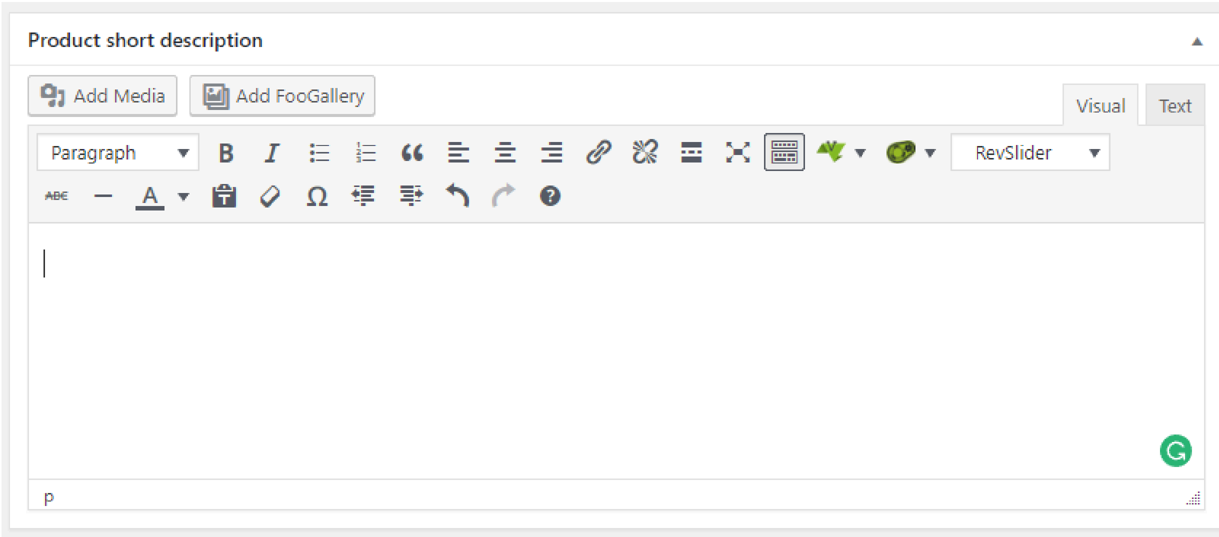

6. (Optional) If there are additional product images to upload, add them via the **Product gallery** widget.
7. Scroll down to the **Product data** widget; make sure **Simple product** is showing in the drop-down menu.
8. Enter the product price in the **General** tab's **Regular price ($)** field.



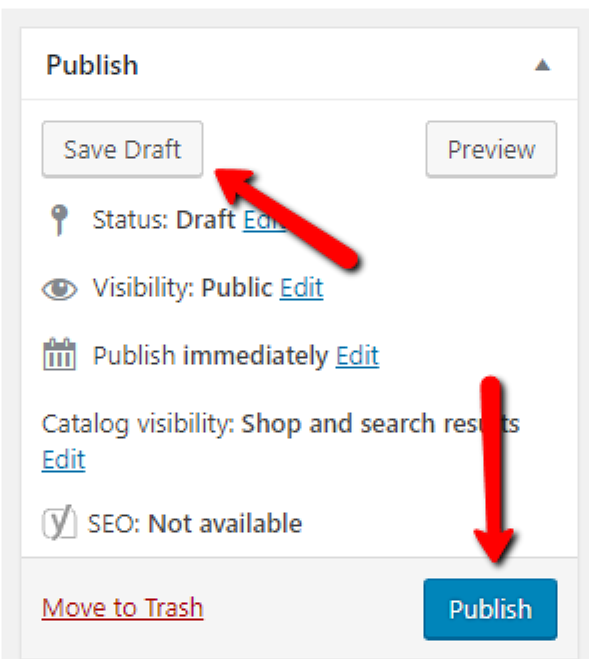

9. Enter the Alert RC number into the **Inventory** tab's **SKU** field.



10. (Optional) If there is any description, note, or dimensions to add, write them in the **Product short description** widget.



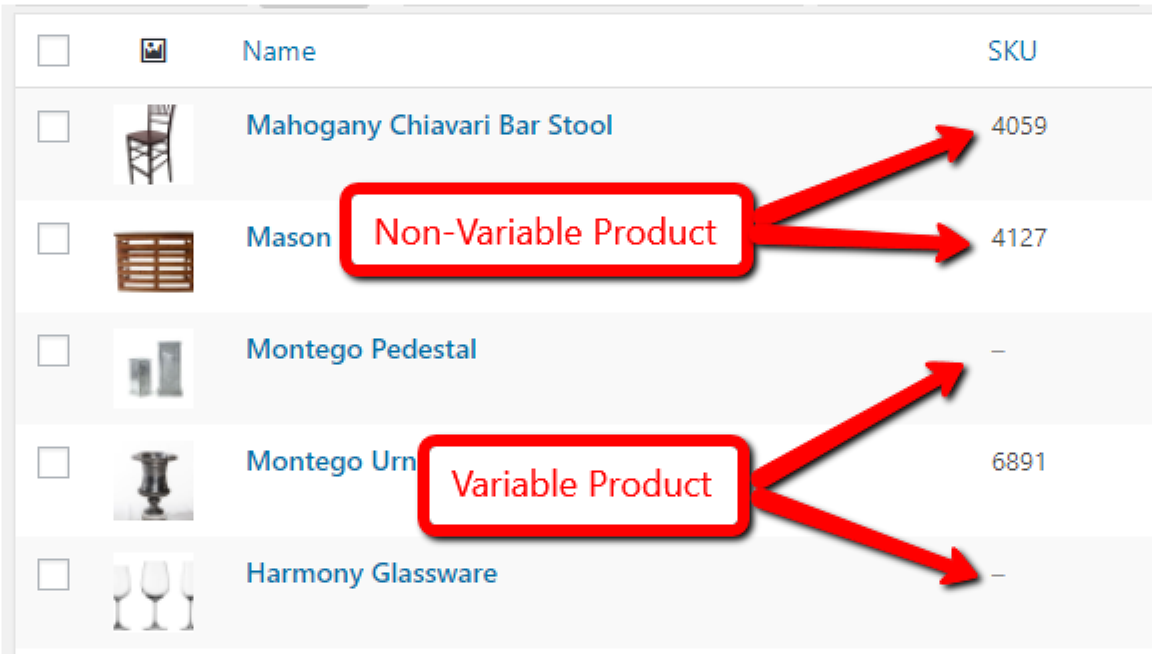

11. **IMPORTANT:** When all the product data is filled in, scroll to the top of the page and in the Publish widget, either press the **Save Draft** button if you are not ready to publish or the **Publish** button if you are. NOTE: if you navigate away from this page before pressing one of those two buttons you will lose all your work and have to create a new product from scratch.




## Updating Product Prices on an Individual Basis

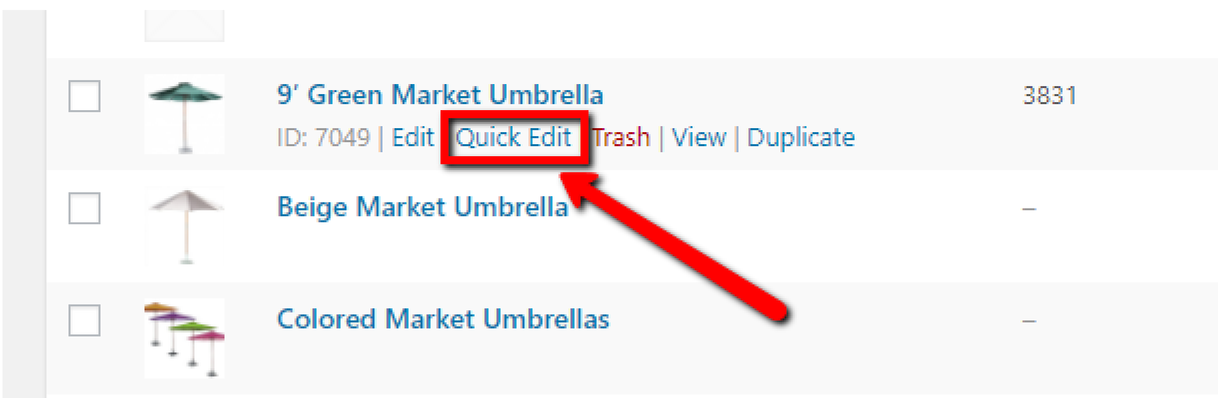
There are two different ways to update product prices on an individual basis depending on whether the product is a Variable product or Non-Variable product. You can tell the difference on the main product screen by looking at the SKU column.

- Variable products have " - " listed as the SKU.
- Non-Variable products list a 4-digit number as the SKU.

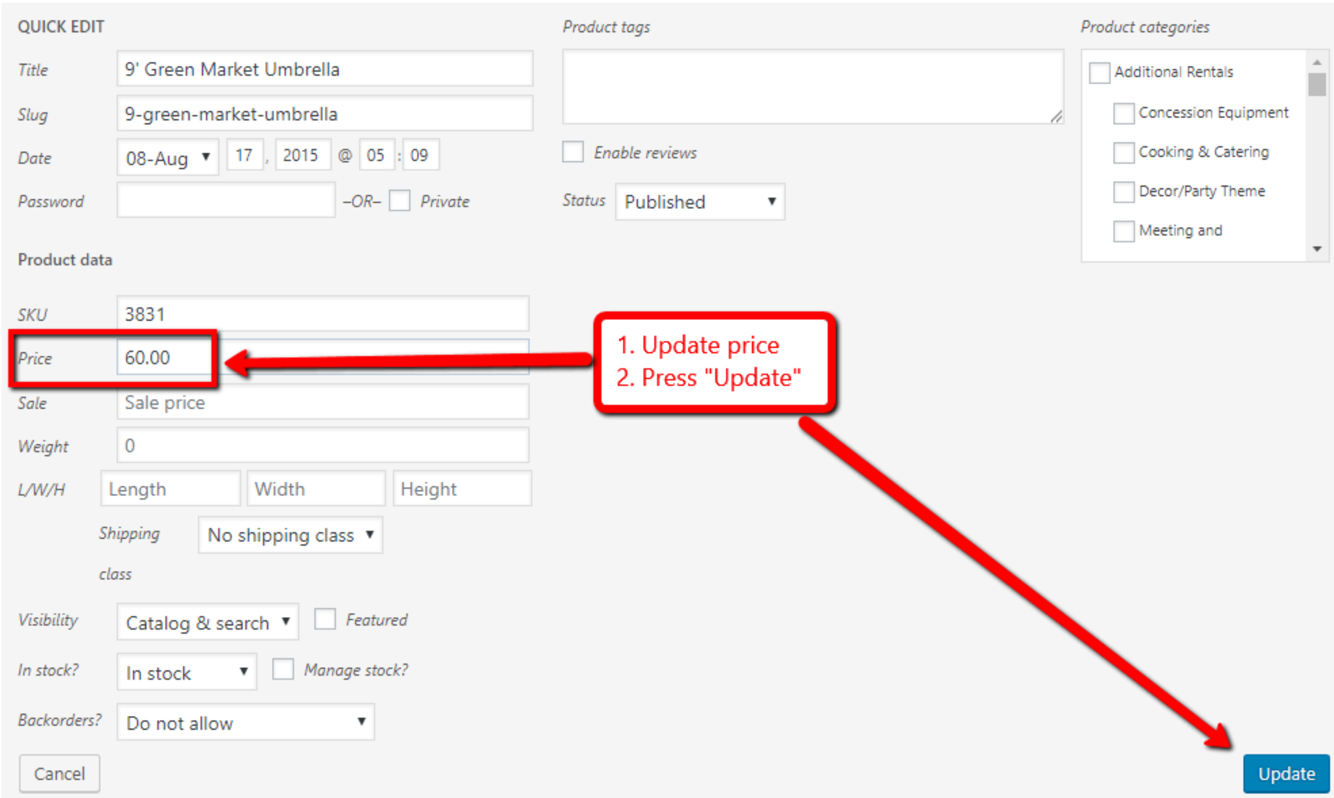



Updating Price on Non-Variable Products

1. On the Product list page, hover your mouse to the right of the product you want to update and click **Quick Edit** from the menu below the product name.



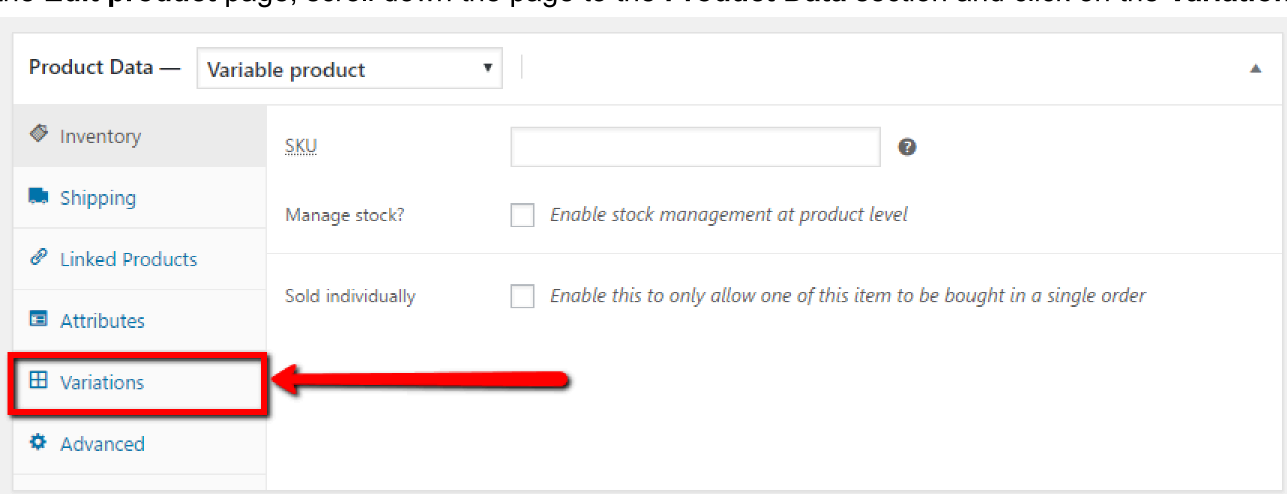
2. In **Quick Edit**, update the **Price** field to the correct price and then click the **Update** button on the bottom right of the Quick Edit area.




## Updating Price on Variable Products

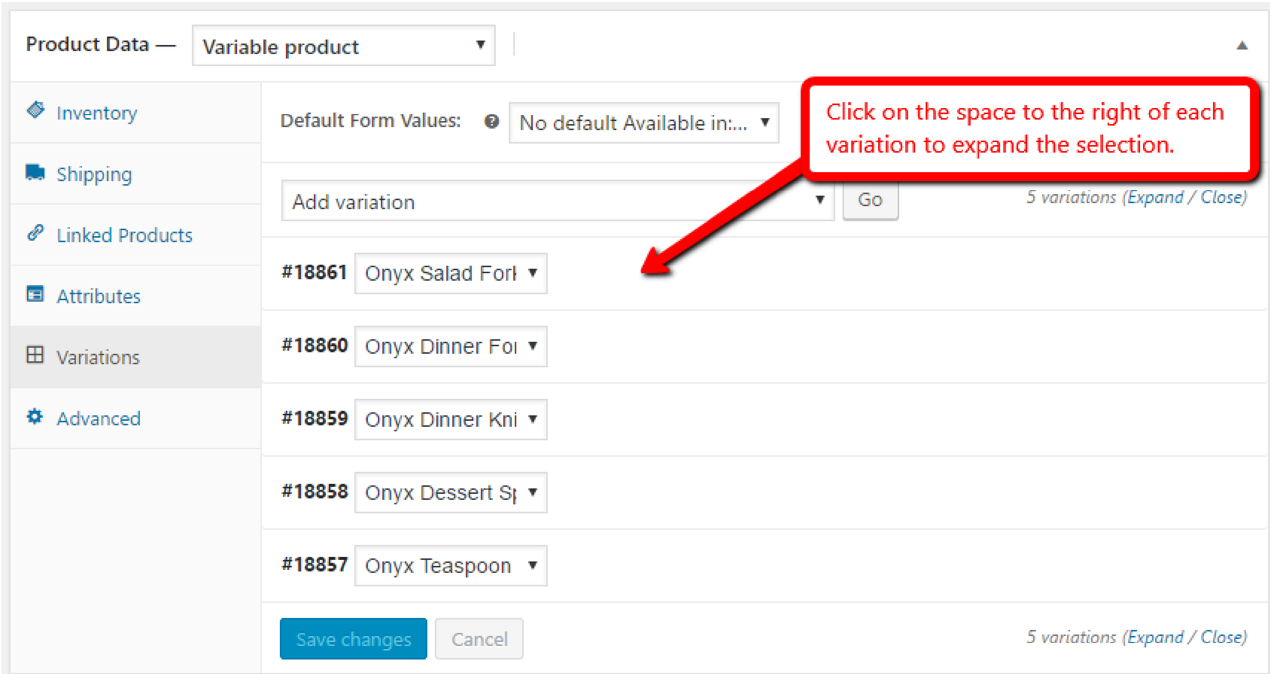
1. From the Product List, click on the Title of the product you want to edit.


2. On the **Edit product** page, scroll down the page to the **Product Data** section and click on the **Variations**

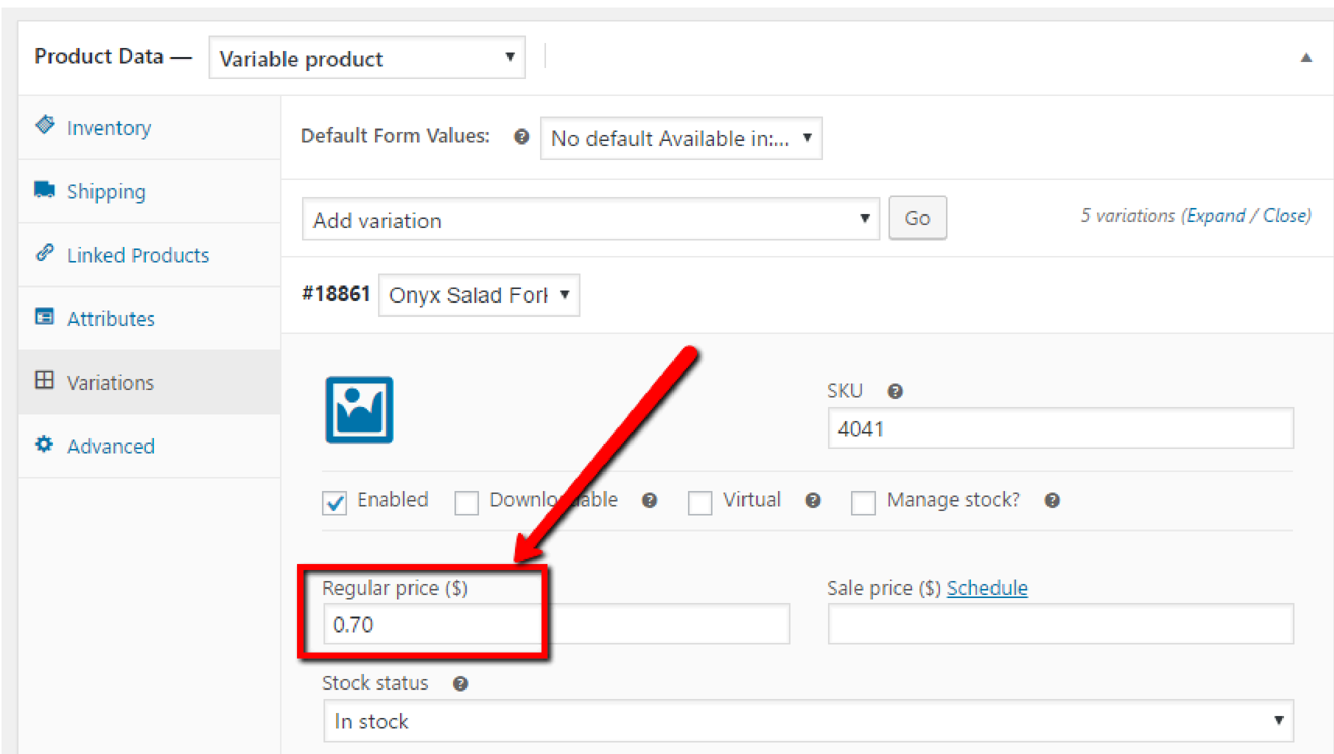



tab.

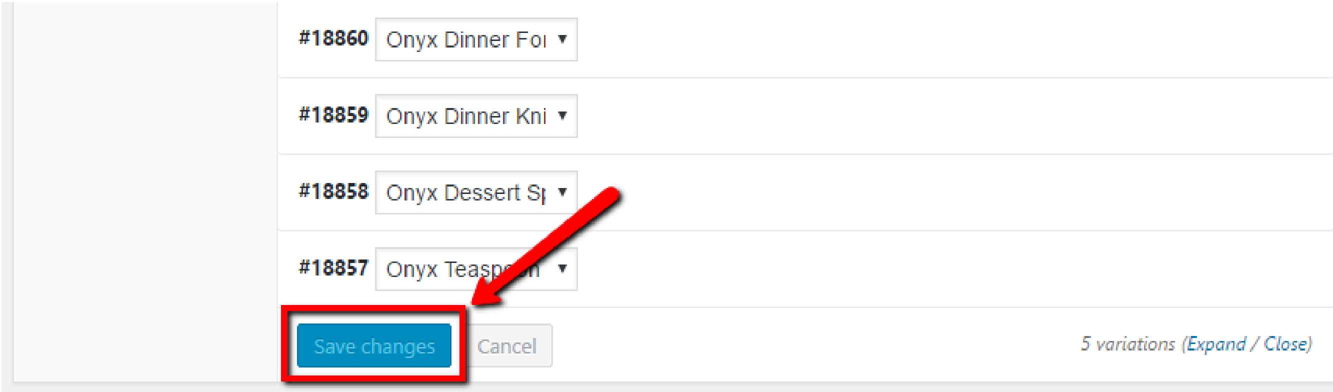
3. In the **Variations** section, click on the blank space to the right of the variation you need to change to open the details and price.



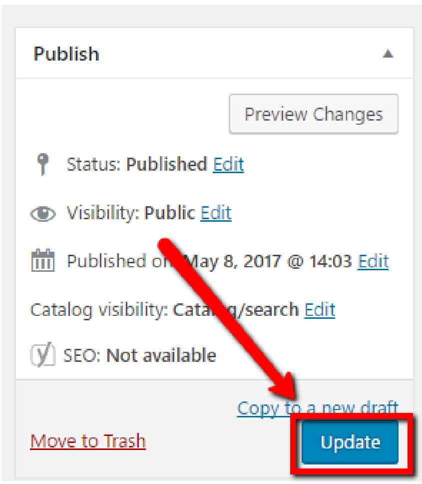

4. Change the price in the **Regular Price** field.



5. Once you're done changing all the variation prices, click on the **Save changes** button at the bottom of the variations.




6. Scroll up the page and press the **Update** button in the **Publish** box in the right sidebar.




## Updating Product Prices for an Across-the-Board Price Increase

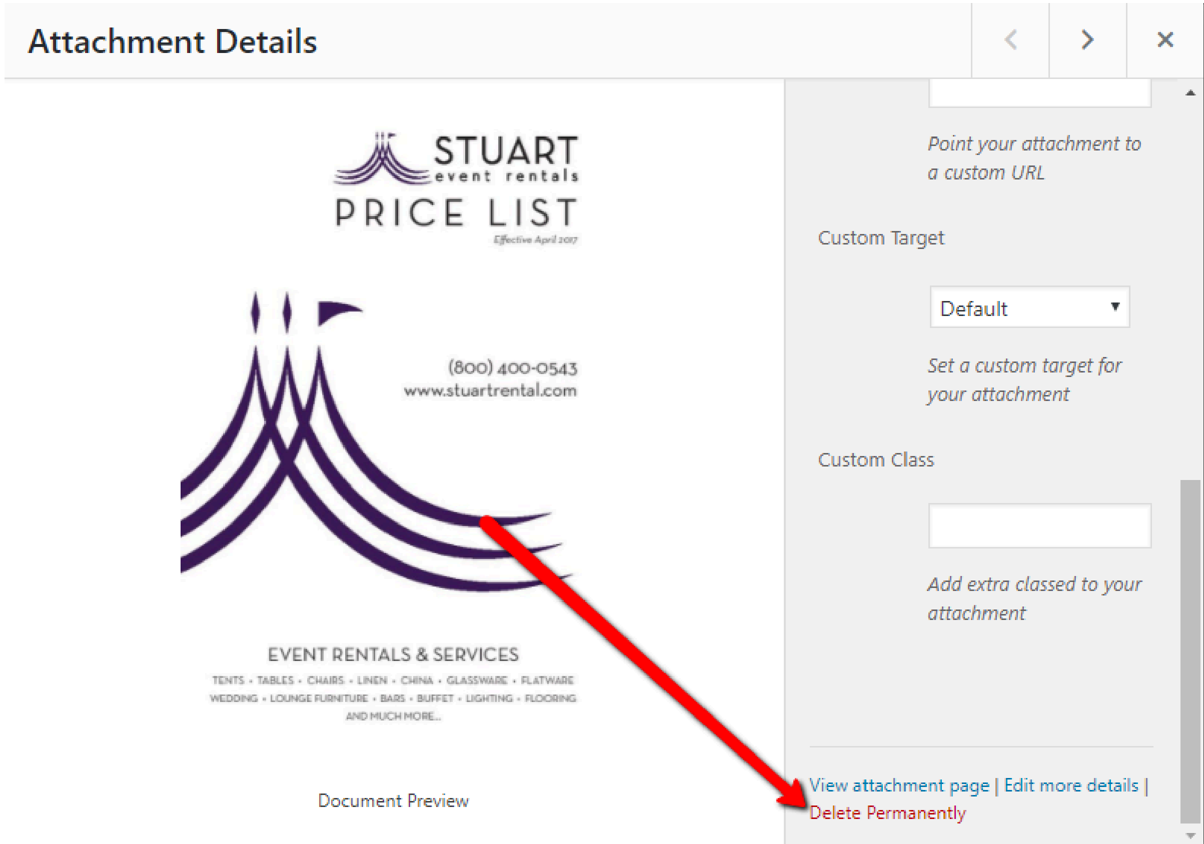
Each year, Stuart generally increases product prices across the board. In these cases, the best way to update prices is to:

1. Get the internal spreadsheet with updated prices from Andrew Sutton.
2. Request the most current website product spreadsheet from Paul Hopper of Snap Digital Media and update the prices on that spreadsheet.
3. Once all the prices are updated on the website product spreadsheet, send it back to Paul for upload onto the website.

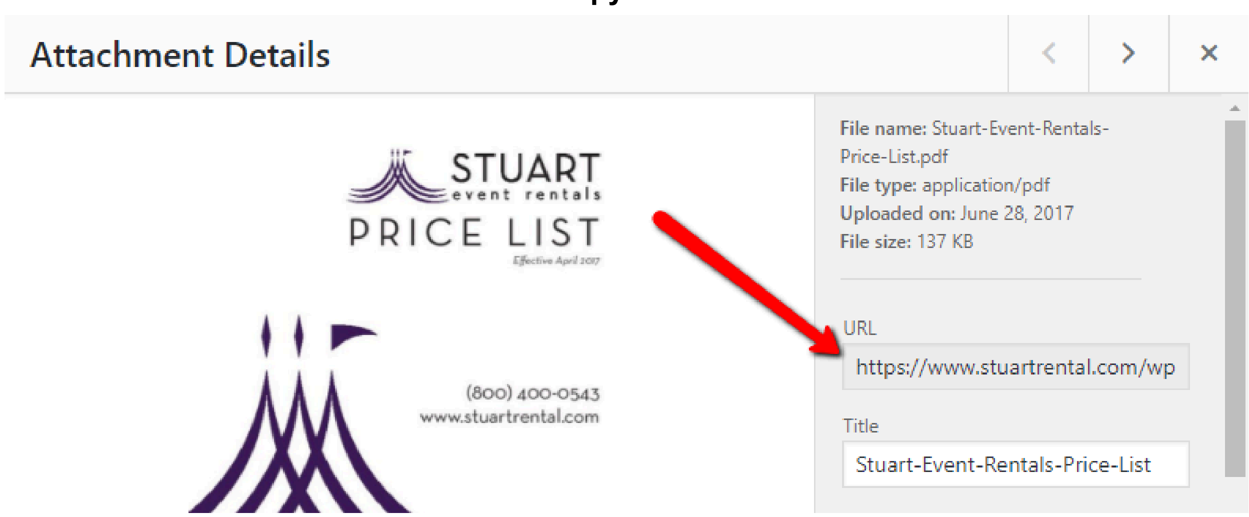
## Updating the PDF Price List on the Website

1. After updating the InDesign price list, create a PDF copy.
    a. Save it as 'Stuart-Event-Rentals-Price-List.pdf' in Dropbox > Marketing > Collateral > Price List.
    b. Overwrite the existing version.
2. Log into WordPress and go to the Media Library; search for **Price List** in the **Search media items…** field to locate the existing price list.

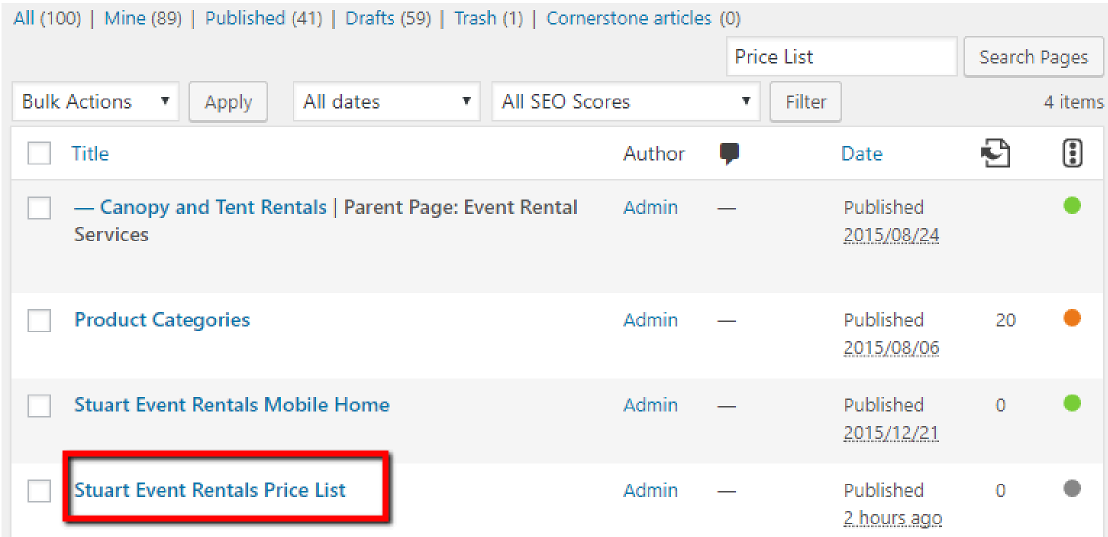
3. Click on the price list to open the **Attachment Details** window > scroll down > click on **Delete Permanently** > click **OK** when prompted.



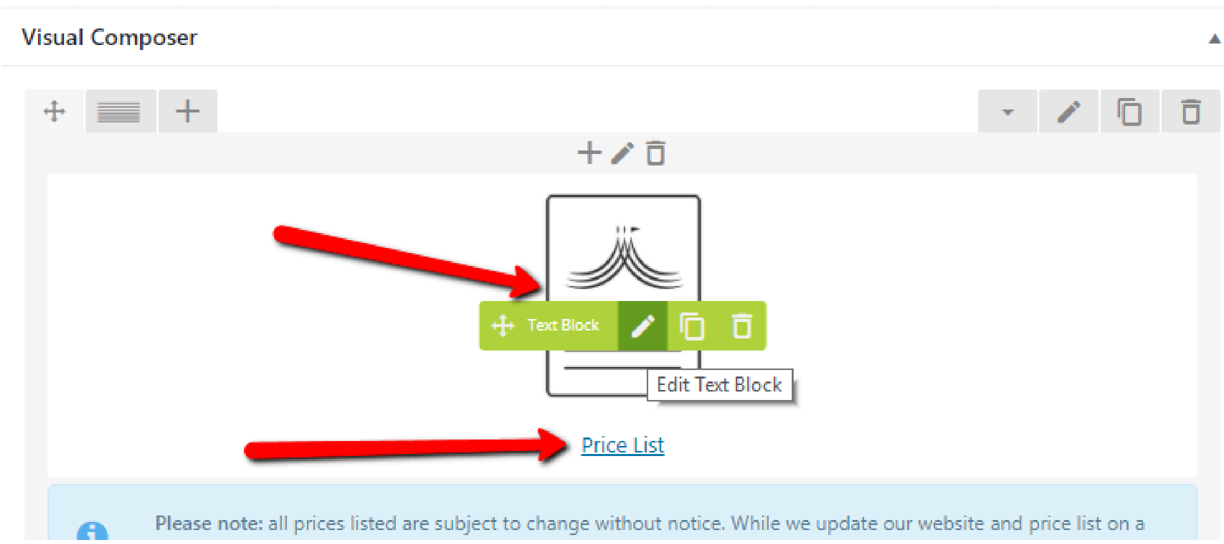

4. Once the previous PDF is deleted, upload the newly updated price list PDF.
5. From the Media Library, click on the newly uploaded price list to open the **Attachment Details** window > select the **entire URL** in the **URL** field > **Copy** it > close the Attachment Details window.



6. In the WP left navigation, click on **Pages** and search for **Price List** in the **Search Pages** field. Open the **Stuart Event Rentals Price List** page for editing.




7. Update the hyperlinks for both the price list icon and text link with the new price list URL you just copied.




8. Press the **Update** button on the page to save the changes.

# Printed Materials

## Basic Information

This is a current list of printed (or printable) materials created and/or managed by the Stuart marketing team:

- Sales Sheets (currently includes: Company Overview, Weddings, Corporate Events, Fairs & Festivals, Schools & Universities, Social Events, Tenting, Rustic, Lounge Furniture, Tailgate Parties, Tech Conferences)
- Product Style Sheets
- Sales Folders
- Price List
- Order Forms
- Business Cards
- Business Envelopes
- Business Letterhead
- Various Internal Documents (e.g. Employment Application, Credit Application)

All of these materials are located in the stu@stuartrental.com Dropbox account at:
Dropbox > Marketing > Printed Materials

## Printed Materials Instructions

### Updating the Company Price List

**Tools needed**
Adobe InDesign
Adobe PDF Pro
Wordpress Login

*Update the InDesign File and Create a PDF*

1. Open the Company Price List InDesign document located in the Dropbox > Marketing > Printed Materials > Price List > **Stuart Event Rentals Price List.indd**
2. Make any required changes
3. Update the "Updated: Month Year" if needed
4. Save the document and then create a PDF version that overwrites the existing **Stuart-Event-Rentals-Price-List.pdf** file in the Price List folder

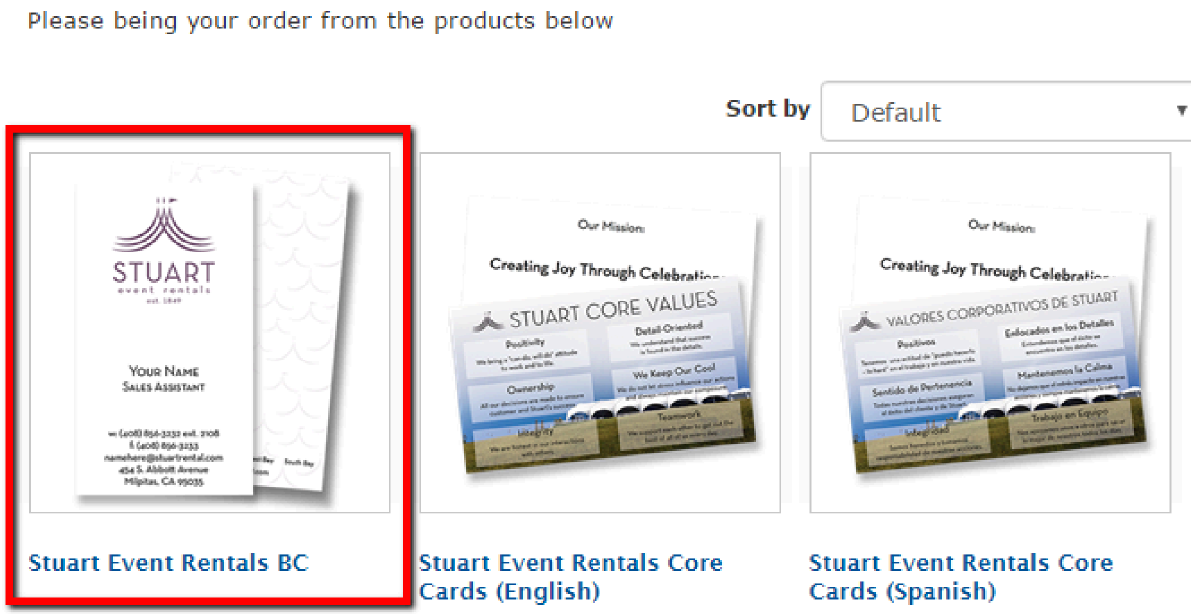
*Upload the PDF on the Company Website*

Follow these instructions: Updating the PDF Price List on the Website

### Ordering Business Cards

1. To avoid errors and confusion, ALL business cards requests must be filled out by the employee's manager using this form: https://docs.google.com/forms/d/e/1FAIpQLSfOTQJI8APP9epgz5e49-1UbaNDwSBL_TU9HHiKnOslzkMYmQ/viewform

2. An email notification that the form has been filled out is sent to stu@stuartrental.com.
3. Once you have the manager-approved request, go to http://proformaalbrecht.myrapidcolor.com/category
    a. Username: stu@stuartrental.com / Password: Milpitas454
    b. Select **Stuart Event Rentals BC**




4. On the Business Card order page
    a. Adjust the Quantity if needed; the default should be 250
    b. Select the **Ship To address** based on the location of the employee receiving the business card (Milpitas, Dublin, or San Jose)
    c. In the **Name Your Job** field, write the employee's name who is receiving the cards
    d. Click on **Customize Order**
5. On the Customization screen
    a. Choose the location of the employee to populate the location on the card
    b. Enter their name, title, phone numbers and email as displayed on the business card order form
    c. Once done entering all of the information, click on the **Update Preview** button on the bottom of the screen to verify all the information was captured correctly
6. If everything is correctly displayed on the display
    a. Check the box next to **Yes, I approve this document**
    b. Click on the **Add to Cart** button
7. On the shopping cart screen
    a. Select **Fed Ex $0.00** from the **Shipping options** drop down
    b. Verify the shipping address is where the employee is located
    c. Verify the quantity
8. If you have additional cards to order, click on the **Continue Shopping** button; otherwise click on **Proceed to Checkout**
9. Submit the Order
10. A proof will be emailed to stu@stuartrental.com for final approval

# Social Media

## Basic Information

Stuart Social Accounts:

- Instagram: https://www.instagram.com/stuarteventrentals/
  - Username/Password: stuarteventrentals / Milpitas454
- Facebook: https://www.facebook.com/stuarteventrentals/
  - Username/Password: stu@stuartrental.com / Milpitas454
- Twitter: https://twitter.com/stuartrental
  - Username/Password: stu@stuartrental.com / Milpitas454
- LinkedIn: https://www.linkedin.com/company/the-stuart-rental-company
  - Stuart Page Admins: Michael Berman & Carrie Greenler
  - Marketing Login - Stu@stuartrental.com - Sabbott454!
- Google+
  - Google My Business Admin Page: https://business.google.com/
    - Username/Password: stu@stuartrental.com / Milpitas454
  - South Bay Page: https://plus.google.com/+Stuartrental-southbay
  - Peninsula Page: Not actively maintained
  - East Bay Page: Not actively maintained
- Yelp
  - Yelp for Business: https://biz.yelp.com/
    - Username/Password: mpringle@stuartrental.com / Milpitas454
  - Milpitas Page: https://www.yelp.com/biz/stuart-event-rentals-milpitas
    - Enhanced business listing; $400/month
  - Dublin Page: https://www.yelp.com/biz/stuart-event-rentals-dublin
    - Enhanced business listing; $400/month
  - San Jose Page: https://www.yelp.com/biz/stuart-event-rentals-milpitas
- *YouTube: https://www.youtube.com/user/stuartrental
  - Username/Password: stu@stuartrental.com / Milpitas454
- *Pinterest: https://www.pinterest.com/stuartrental/
  - Username/Password: stu@stuartrental.com / Milpitas454
- *Tumblr: https://stuarteventrentals-blog-blog.tumblr.com/
  - Username/Password: Unknown

*Not actively maintained

## Posting Guidelines

- Photos should be of Stuart-related events only — whether we are creating the post or sharing other posts
  - Use a variety of types of photos that showcase Stuart, our customer types, our products, and our services.
  - After getting info from the Salesperson, mention the client and any other vendor known to work on the event.
  - Use the geo-tag (add to photo map) option when relevant.

### Instagram

Type of posts: High-res photos

- Optimal image size: 1080 x 1080 pixels
- Use relevant hashtags to expand reader reach, but limit them to no more than 4 or 5 per post.
    - Tagging the location where the photo was taken gives some context to the image.

### Facebook

Type of posts: Company news, promotions, blog posts, event videos, and curated content

- Every post should have an associated image
- Optimal image size: 1200 x 630 pixels
- Curated content should be directly related to the event industry or event trends
- Do NOT use hashtags - they don't mean anything on FB or Google+.

### Twitter

Type of posts: Company news, blog posts

- Limit verbiage (including text, hashtags, URL links, etc.) on posts to 140 characters.
- Any images used should be of Stuart-related events only.
- Optimal image size: 440 x 220 pixels
- Use relevant hashtags to expand reader reach, but limit them to no more than 4 or 5 per post.

### LinkedIn

Type of posts: Jobs, company news, and professional content

- LinkedIn posts should be related to Stuart news or business/industry-related trends or information.
- Do NOT use LinkedIn for image-focused posts unless you can tie it into Stuart news or business/industry-related trends or information.
- Do NOT use hashtags on LinkedIn.

### Nextdoor

Type of posts: Promotions, company news, and jobs

- TBD
- Do NOT use hashtags on Nextdoor.

### Pinterest

Type of posts: Infographics and step-by-step photo guides

- Posts should be original Stuart material

*References:* https://blog.bufferapp.com/what-to-post-on-each-social-media-platform; https://makeawebsitehub.com/social-media-image-sizes-cheat-sheet/

## Monitoring & Responding to Social Media Activity

Social Media accounts should be monitored on a regular basis - *ideally daily* - to ensure we are acknowledging and responding to any mentions, questions, or comments that require attention.

## Instagram

Instagram is the Stuart social media profile that gets the most interaction and should be monitored daily (M-F).

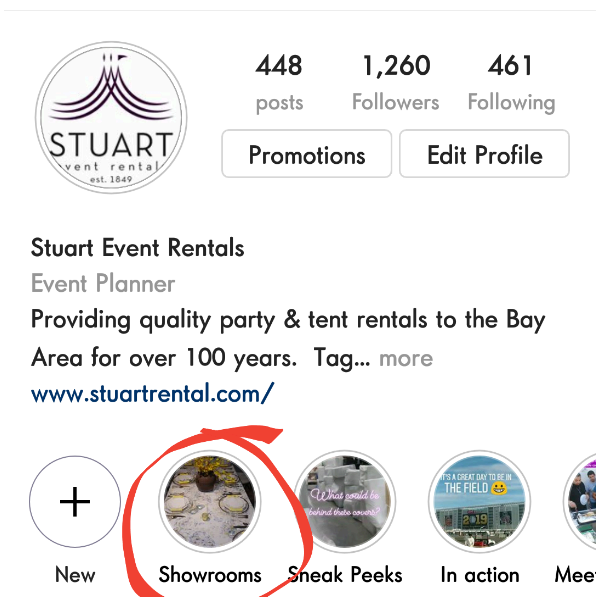
1. For any mentions of @stuarteventrentals:
    a. Use the @name of the poster to thank and respond to the mention (otherwise, they won't see our response).
    b. Follow them (using the Stuart account) if we aren't already.
    c. Share the post and give credit to the original poster;
        i. **Note:** use the Buffer browser extension ([https://buffer.com/extensions](https://buffer.com/extensions)) to be able to share Instagram posts on other Stuart social media accounts.
2. For anyone who comments on a Stuart post...thank and engage with them as appropriate.
3. Follow other local event professionals (event planners, caterers, venues, etc.) and comment on their posts when appropriate to increase Stuart name recognition with them and their clients.
4. Follow clients and like and/or comment on their posts when appropriate.
5. Like a LOT of other people's relevant posts; more likes = more name recognition.

## Instagram

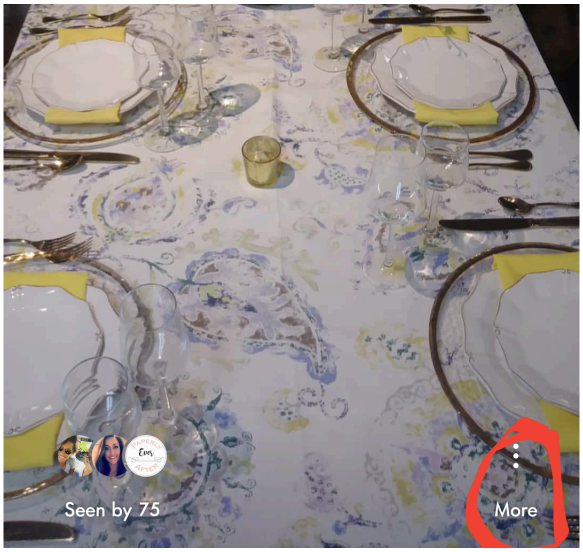
### Featured Stories

Post Types – Highlight categories - For Gregg to figure out

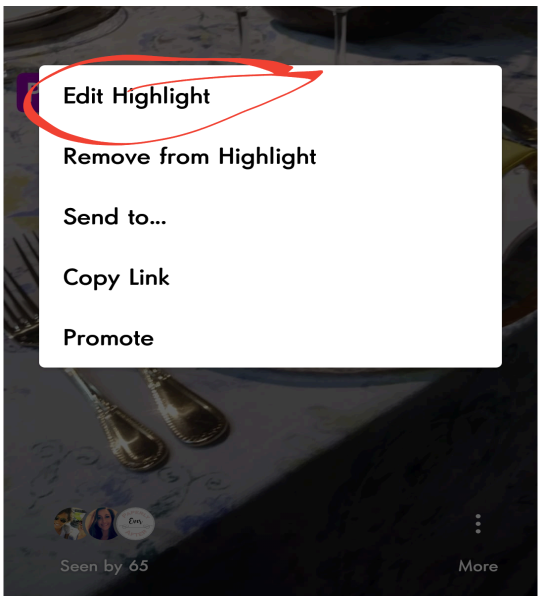
- Kept current weekly – not ALL categories to be updated but appearing in the stories feed, from updating/adding to any category, daily would be a good Q1 goal.
- Changing Story Highlight Icons. This must be done from the App
    - Click on the story you want to edit



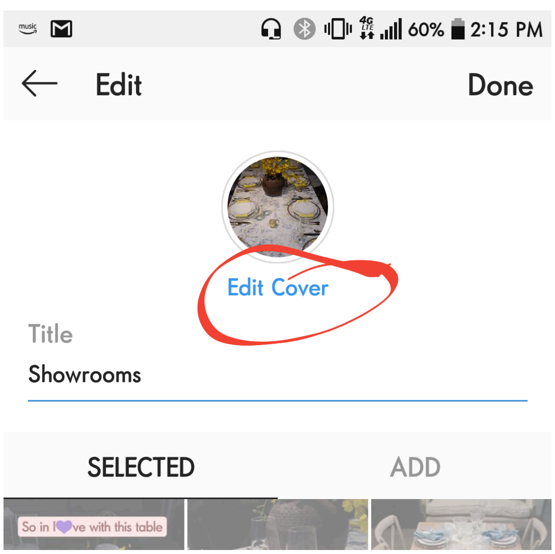

- In the lower right hand corner, click the three dots (…More)



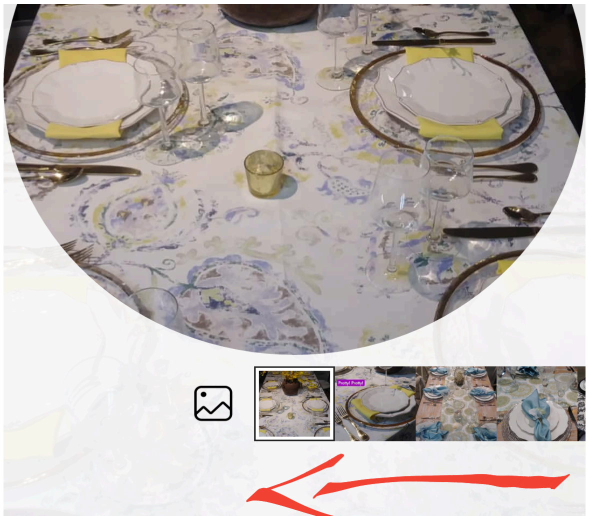

- Click “edit highlight”

    - 

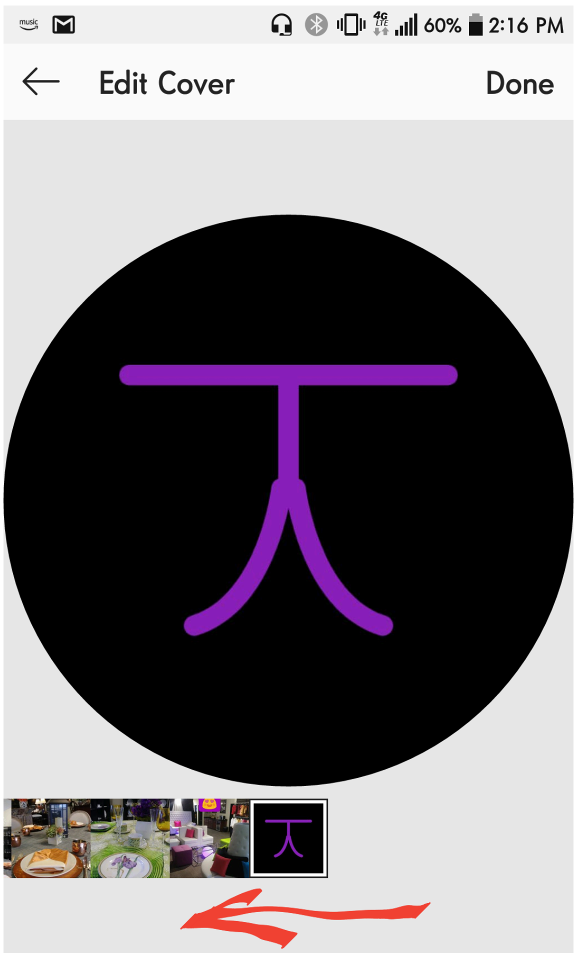

- Click “Edit Cover”



- Scroll till you find the image you want.



- Select the image and position it however you like within the circle and select “Done”



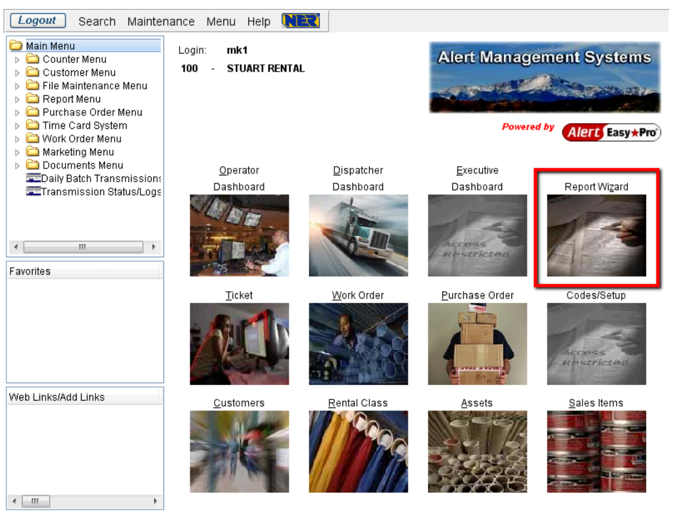
# Email

## Running Daily Alert Report to Get Emails

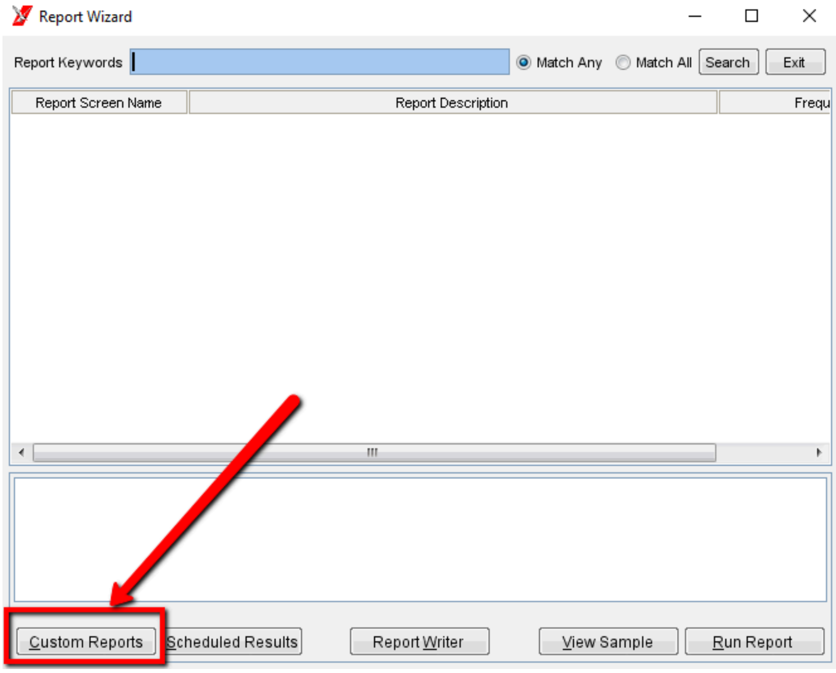
Toward the end of each business day, a custom report is run in Alert to obtain contacts and email addresses of orders that were picked up/returned via will-call that day. These contacts and emails are then used for our 3rd party email survey service (Broadly) and adding new customers to our master marketing email database for future email communications to customers. Once run, these reports need to be cleaned and organized before they can be submitted to Broadly and the email database.

### Run the Alert Report

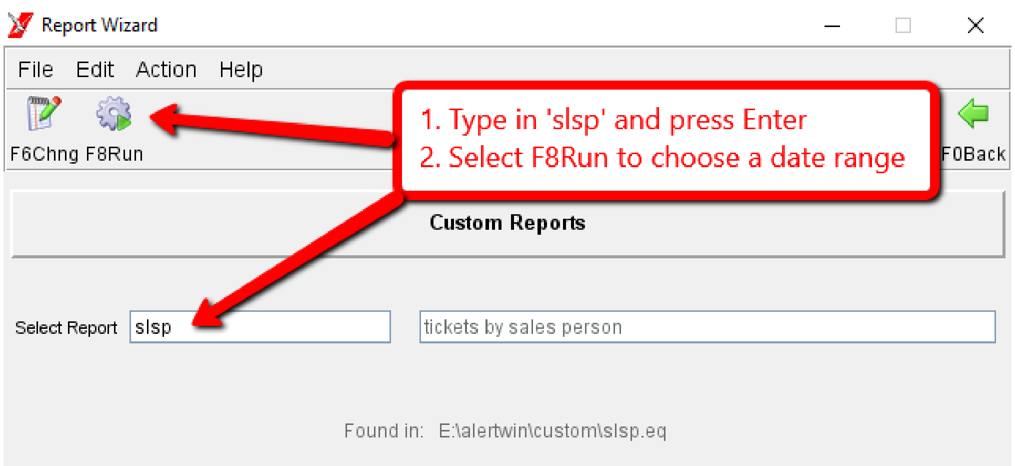
1. Log into **Alert** and select **Report Wizard**



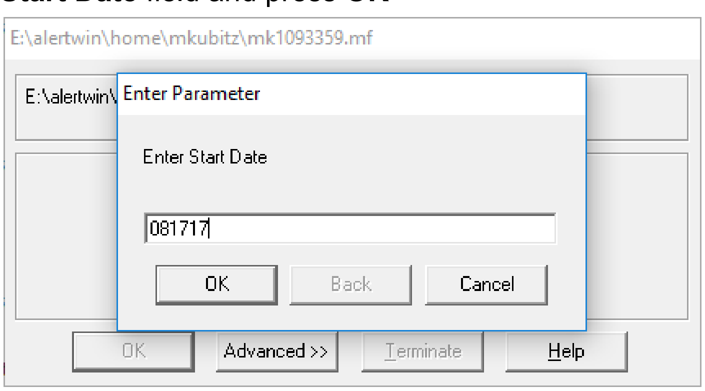
2. Click on **Custom Reports** on the bottom left of the **Report Wizard** window



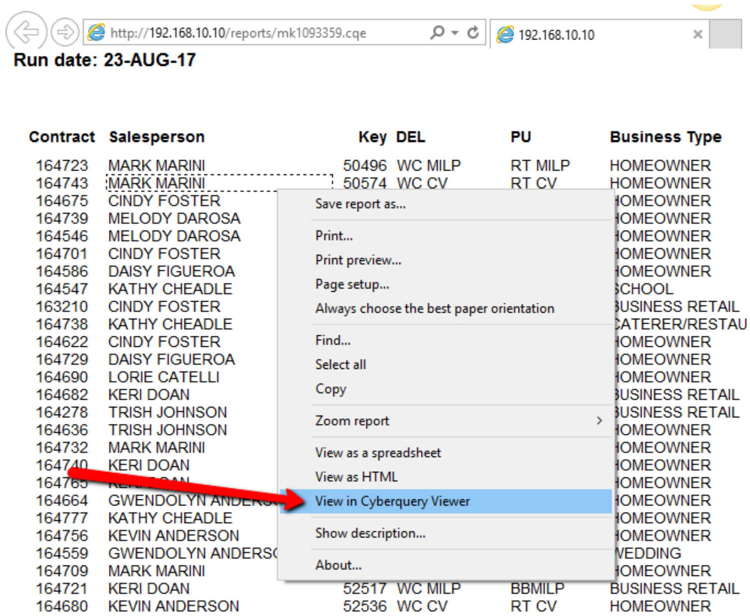

3. Type in **slsp** into the **Select Report** field and press **Enter** to activate the **F8Run** button > click **F8Run** which will prompt you to enter a date range for the report to be run



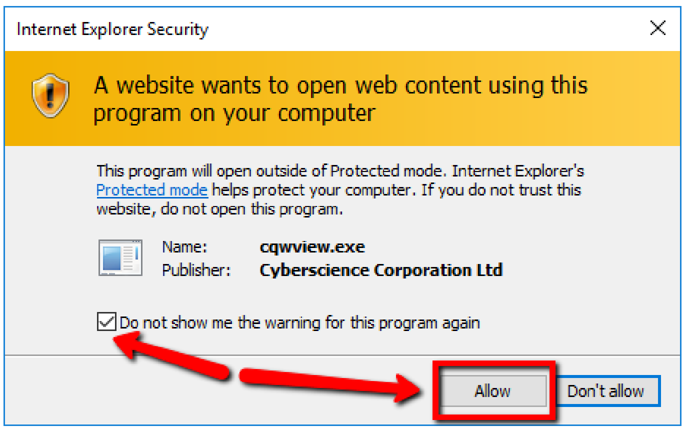

4. Enter the start date in the **DDMMYY** format (e.g. August 17, 2017 is entered as 081717) in the **Enter Start Date** field and press **OK**



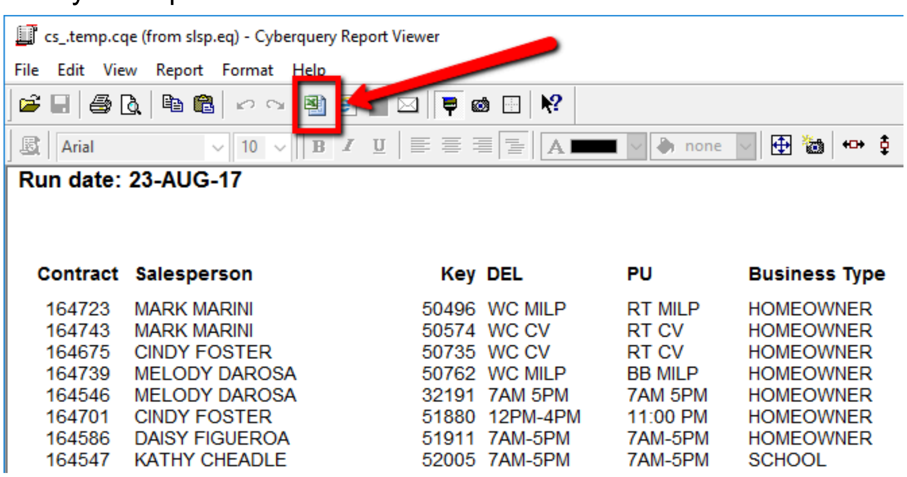

5. Enter the end date in the same format in the **Enter End Date** field and press **OK**
    a. Note: to run a report for one day only, enter the same date for both the start and end date fields
6. The finished report will open in an Internet Explorer window; right-click anywhere on that window and select **View in Cyberquery Viewer**




Note: if prompted, check **Do not show me the warning for this program again** and press **Allow**




7. Once it is open in **Cyberquery Viewer**, click on the **Excel icon** to open it in Excel so that you can modify the report




8. Save the spreadsheet with the appropriate date range in **Dropbox** > **Marketing** > **Email** > **Broadly Customer Survey Lists**

## Clean the Data

Once in Excel, you'll need to clean the data to get it ready to submit to Broadly and Mailchimp

1. **Sort** data by **Email**

a. Delete all rows that are missing an email address
b. Delete all rows that are Inventory Adjustments and have cayala@stuartrental.com as the email address
c. Delete all rows that only have an email for the Accounts Payable department (e.g. ap@company.com or invoices@company.com)
d. Delete all rows that are duplicates (due to multiple contracts for the same event)
e. If more than one email is listed, delete all but the email of the **Contact Name**
f. Delete all rows where the **Contact Name** and **Email** do not match

| | | |
|---|---|---|
| THE BARTENDING BABES | DESHAWN | deshawn_butler@yahoo.com |
| MORPHO DETECTION | RAE WILLIAMS | dfanucch@morphodetection.com,morphoinvoices@epayablesmanager.com |
| VECTRA NETWORKS | DENA HOUSE 408.813.1333 | dhouse@vectranetworks.com |
| LALWANI, DILIP | DILIP LALWANI | dlalwani@gmail.com |

g. Delete any phone numbers or extensions in the **Contact Name** cells

| | | |
|---|---|---|
| MORPHO DETECTION | RAE WILLIAMS | dfanucch@morphodetection.com,morphoi |
| VECTRA NETWORKS | DENA HOUSE 408.813.1333 | dhouse@vectranetworks.com |
| LALWANI, DILIP | DILIP LALWANI | dlalwani@gmail.com |
| CAL BERKELEY ALUMNI ASSOCIATIO | DONNA HOUSER 510.900.8229 | donna.houser@alumni.berkeley.edu |
| TAYLOR, CELESTE | CELESTE TAYLOR | dougmtaylor@sbcglobal.net |
| LYKE NED | NED LYKE | eblyke@comcast.net |

h. If an email address has a space in front of it, delete the extra space
i. Check for any obvious spelling errors and try to fix when possible

| | | | |
|---|---|---|---|
| HOMEOWNER | RAJESH, RAJSHREE | RAJSHREE RAJESH | rajshreegururaj@gmail.com |
| HOMEOWNER | WICK, TOLFI | TOLSI WICK | raytsw@comcast.net |
| CATERER/RESTAURANT | JALSA CATERING & EVENTS | RESHMI | reshmi@jalsasf.com |
| BUSINESS RETAIL | RB REED ENTERPRISES | RICHARD REED | richard@rbreedenterprises.c |

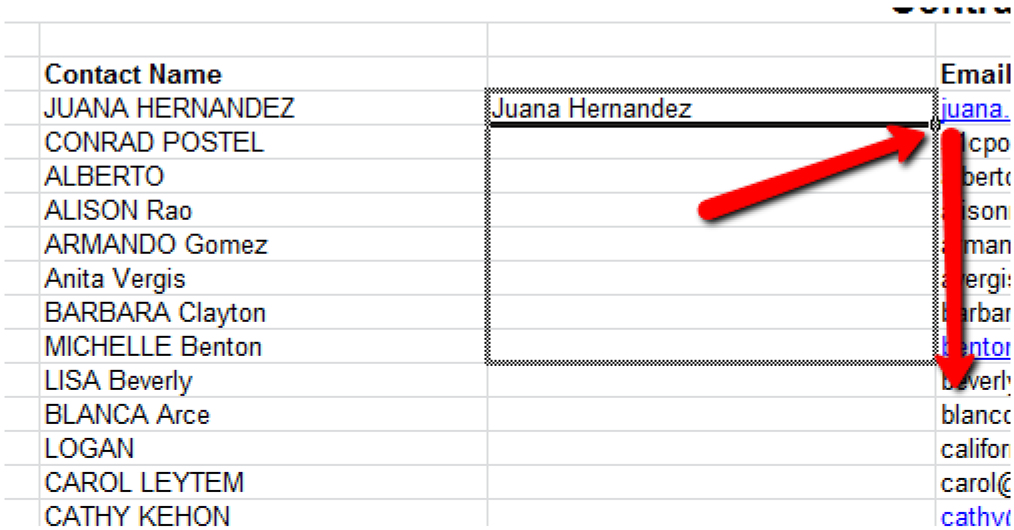
j. Make sure the **Contact** is **First Name Last Name** wherever possible
   i. It may be listed in the **Customer Name** cell if it is a Homeowner
   ii. It may be obtained by looking at the **Email**

| | | |
|---|---|---|
| SAVEUR PROVENCE | CATHY KEHOE | cathy@saveurprovence.com |
| DAHL, CHANNING | CHANNING DAHL | channingdahl@yahoo.com |
| LAKE CHALET | | chris@chaletmgmt.com |
| CHUCKQUE BBQ | CHUCK | uckquebarbecue@gmail.com |
| BULLIS CHARTER SCHOOL | ORATHI MACDONALD | hunmacdonald@yahoo.com |

1. **Sort** by **Salesperson** and separate orders by location: Milpitas, Dublin, and San Jose
   a. Generally, the location can be determined by the location of the Salesperson
      i. Dublin includes Cindy Foster, Mark Pringle
      ii. San Jose is Lorie Cataelli
      iii. Milpitas is everyone else
   b. However, there are exceptions to this rule: if the **DEL** (Delivery) and **PU** (Pick Up) fields **both** show a different location than where the Salesperson works, put that row into the location listed in **DEL/PU**
2. Convert the **Contact Name** from **ALL CAPS** to **Proper Case**
   a. **Insert** a blank column to the right of the **Contact Name** column
   b. In the first cell to the right of the top **Contact Name** entry, type **=proper(** > click on the contact name to the left > press **Enter** to convert it to Proper Case

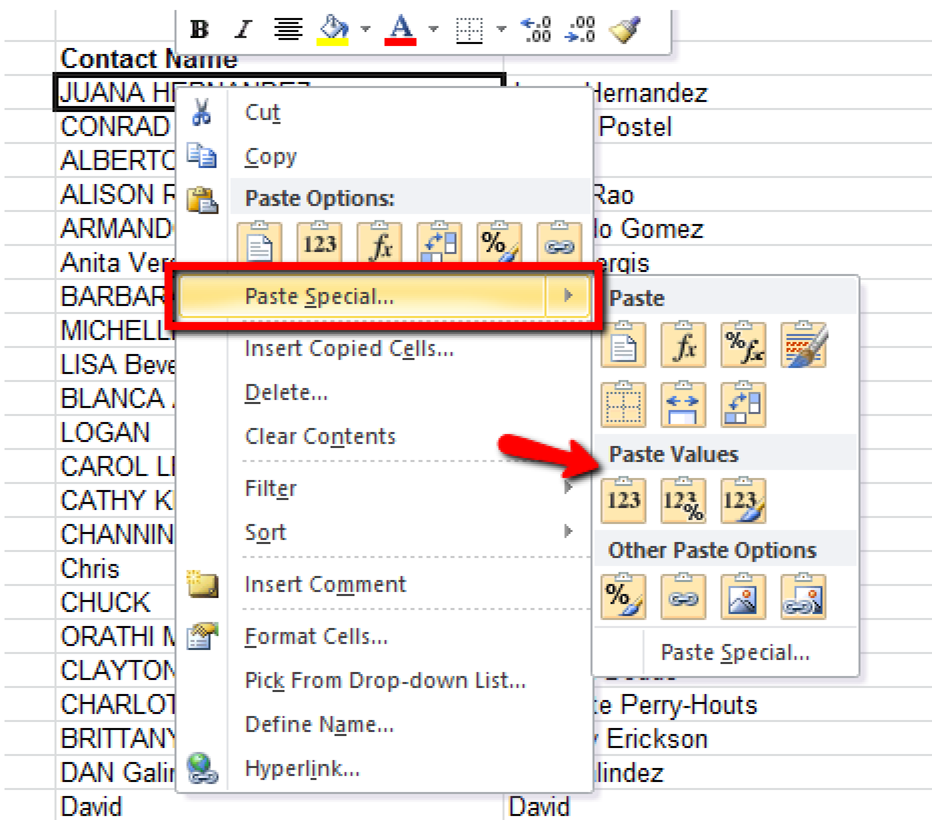
| Contact Name | | Ema |
|---|---|---|
| JUANA HERNANDEZ | =proper(H4) | juana |
| CONRAD POSTEL | | 31cp |
| ALBERTO | | alber |

c. Click on the bottom right corner of the cell containing the Proper Case name, hold and drag it down to the last row of data




d. Select all of the cells containing the Proper Case names and **Copy**

e. Click on the top name of the **Contact Name** column > **right-click** > **Paste Special…** > **Paste Values**

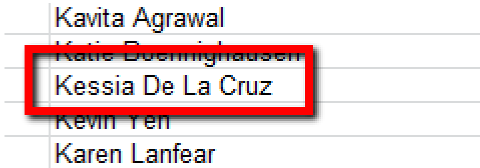



This will replace the ALL CAPS names with Proper Case names (that are not based on an Excel formula)

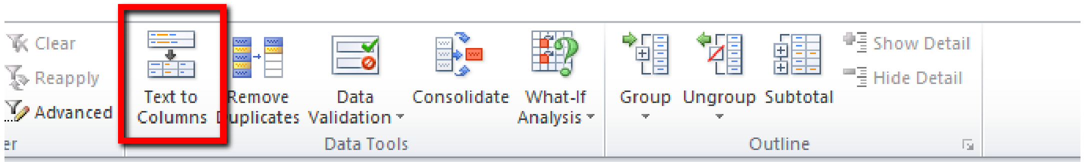
f. Delete the data in the column you used the =proper( ) formula and just copied

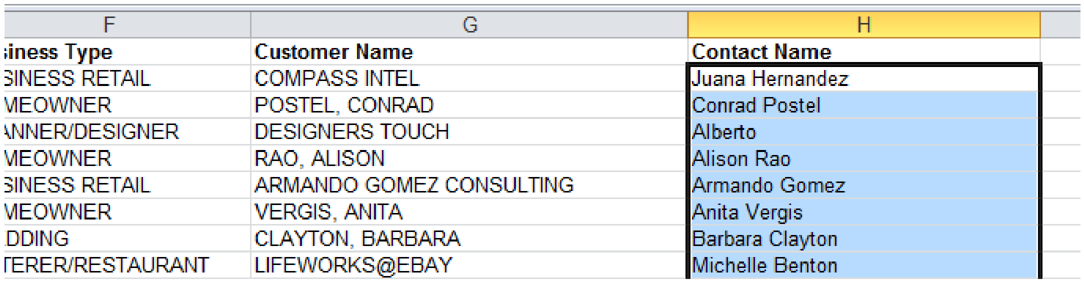
3. Separate the **Contact Name** into **First Name** and **Last Name** columns

a. **Insert 3 columns** to the right of the **Contact Name** column (this is in case there are more than First/Last names in the Contact Name column)

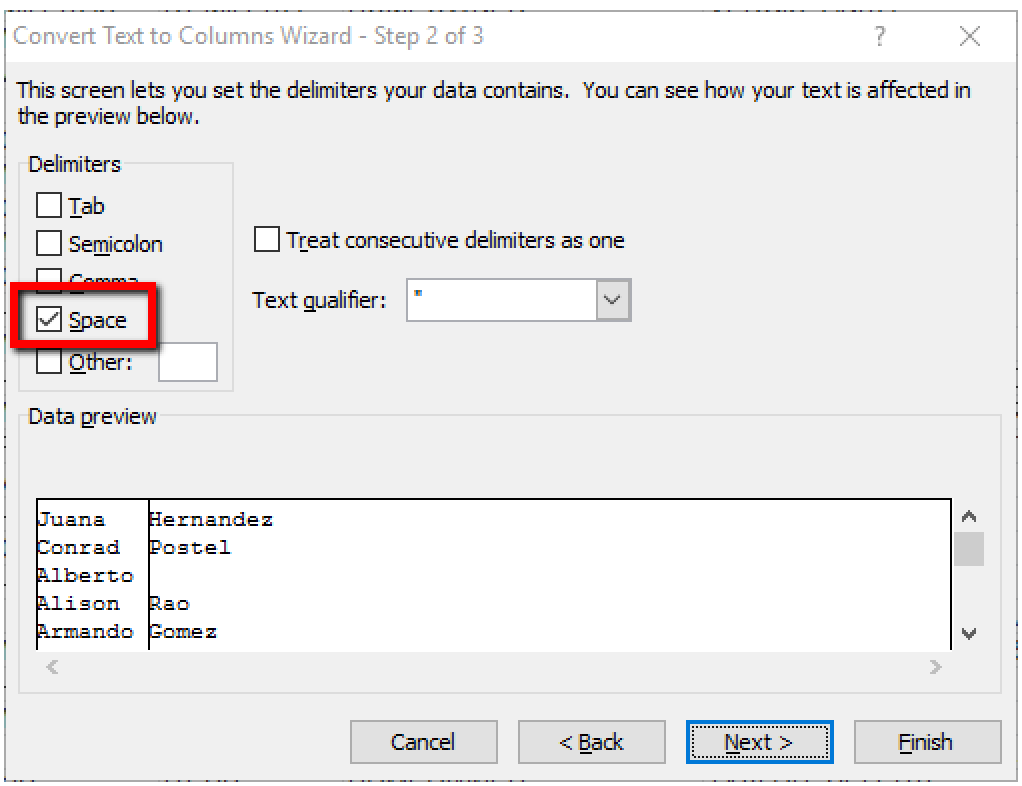



b. Select all of the cells containing **Contact Names** and in the **Data** tab select **Text to Columns**




c. Follow the **Convert Text to Columns Wizard**
   i. In **Step 1** make sure **Delimited** is selected
   ii. In **Step 2** check only the **Space** box and press **Finish**




d. When prompted with **Do you want to replace the contents of the destination cells?** Press **OK** (as long as you have 3 blank columns to the right of Contact Name)

e. Combine any Last Names that are now in more than one column

| | | | |
|---|---|---|---|
| Katie | Boennighausen | | |
| Kessia | De | La | Cruz |
| Kevin | Yen | | |
| Rachel | Lo | | |
| Rajshree | Rajesh | | |
| Reshmi | | | |
| Richard | Reed | | |
| Amy | Frias | | |
| Sabine | Van | De | Water |
| Sadaf | Skandari | | |

f. You should now have **First Name** and **Last Name** columns

4. Review the **Business Type** column to make sure they are correct; the categories are:
   a. (B) BUSINESS RETAIL – A company that is “brick & mortar”; they sell products/services in a retail setting
   b. (C) CATERER / (D) RESTAURANT – A catering company, individual caterer, or a restaurant
   c. (T) CONSTRUCTION – A company offering construction services
   d. (W) CORP. CATERER – A catering company providing services within a corporation’s campus
   e. (O) CORPORATE COMPANY – A large company that provides technology or web-based services and products (I think this may be a source of confusion for some)
   f. (E) EMPLOYEE – Any Stuart Event Rental employee (even if it is rented to them using their personal email account or side-business)
   g. (P) EVENTS/ENTERTAINMENT – A fair or festival or company that specifically organizes fairs and festivals - Combined with PLANNER/DESIGNER – An event planner or designer, including for weddings
   h. (G) GOVERNMENT – A city, county, or government agency (e.g. police department, public library, public transit, etc.)
   i. (H) HOMEOWNER – Someone holding a private event
   j. (I) HOTEL/VENUE – A hotel, convention center, winery, meeting center, arena, or other location where event space is rented out
   k. (M) MEDICAL/HOSPITAL – A medical services provider (hospital, HMO, medical offices, etc.)
   l. (N) NON-PROFIT – A non-profit or not-for-profit organization that uses its proceeds to further its mission of serving a community or cause
   m. RELIGIOUS – A religious-based organization
   n. (S) SCHOOL/EDUCATION – A school, school district, community college, or university
   o. (R) RENTAL CO. – A company that is a direct competitor or that we sub-rent from
   p. VENDOR – A company that we purchase supplies, equipment, and services from

## Submitting Daily Emails to Broadly (for Customer Survey)

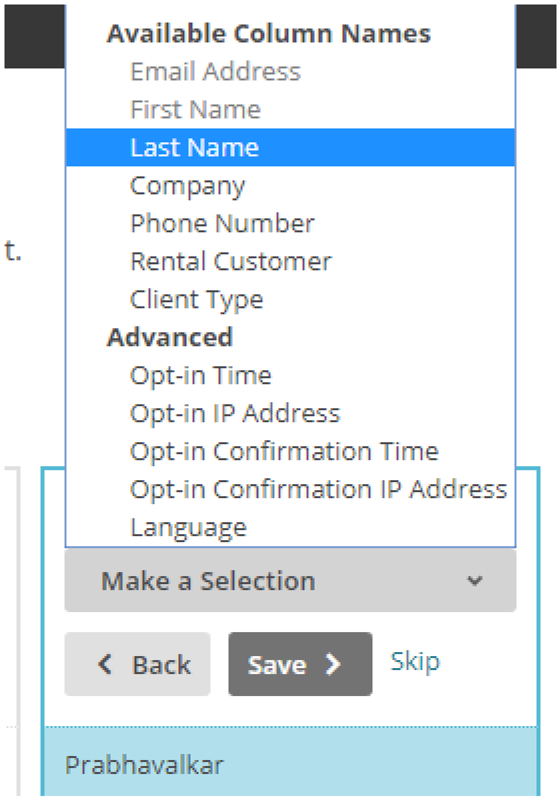
1. Open the Broadly Internet Dashboard - https://app.broadly.com
   a. Select the Add tab on the left side page column For each person on the list, enter the **First Name** (no Last Name) and **Email** on the Broadly subscriber page for the appropriate Stuart location
      i. Milpitas - https://app.broadly.com/#/58408c2e62d85a650034fd1f/add/one
      ii. Dublin - https://app.broadly.com/#/5865673133e39f66005bc087/add/one
      iii. San Jose - https://app.broadly.com/#/586567abbb8d906500b698f4/add/one

## Uploading Daily Emails to the Master Marketing Email Database

Zoho Log In Information
Username: stuarteventrental

Password: Milpitas454!
Depending on the amount of customer orders you have on any given day, there are two ways to add the new customer data to Mailchimp:

1. **Submitting Them Individually**: this method is only appropriate if you have a short list of names (e.g. less than 10) and you have BOTH the First Name and Last Name of all Contacts
    a. Log in to Mailchimp, navigate to **Lists** and click on **Stuart Master List**
    b. Click on the **Search icon** and enter in the first email on the list in the search field
        i. Skip any repeat customers you know are already in Mailchimp
        ii. If a search shows that a contact is already in Mailchimp do nothing and search for the next email on the list
        iii. If the email search shows **No results**, close the search function and go to **Add contacts** > **Add a subscriber**
        iv. Enter the data for all the **Add subscriber** fields > check the two boxes > press **Subscribe**
        v. Resume searching for emails on the list and adding any new customers until complete
2. **Importing a Spreadsheet**: this method is appropriate for larger lists that would be too time consuming to enter individually or if you have contacts that do NOT have BOTH First Name and Last Name which is required for to manually add a contact to Mailchimp
    a. Log in to Mailchimp, navigate to **Lists** and click on **Stuart Master List**
    b. Go to **Add contacts** > **Import contacts**
    c. Select **Copy/paste from file** and press **Next**
    d. **Select and Copy** the data you need to import from the **Excel spreadsheet**, making sure that the columns are in this order:
        i. Email
        ii. First Name
        iii. Last Name
        iv. Customer Name
        v. Phone
        vi. Type (Note: all the entries in this column should be **Yes**)
        vii. Business Type
    e. Paste the data into the **Paste subscriber info** box > check the box next to **I understand that my billing plan may be automatically upgraded** > click **Next**
    f. Match each Column name to the appropriate **Make a Selection** drop-down option and press **Save**




Note: select **Rental Customer** for the column that contains all **Yes**

g. Click Next when done naming all the columns
h. On the last Import screen, select **Subscribed** > check the box next to **Auto-update my existing list** > click **Import**

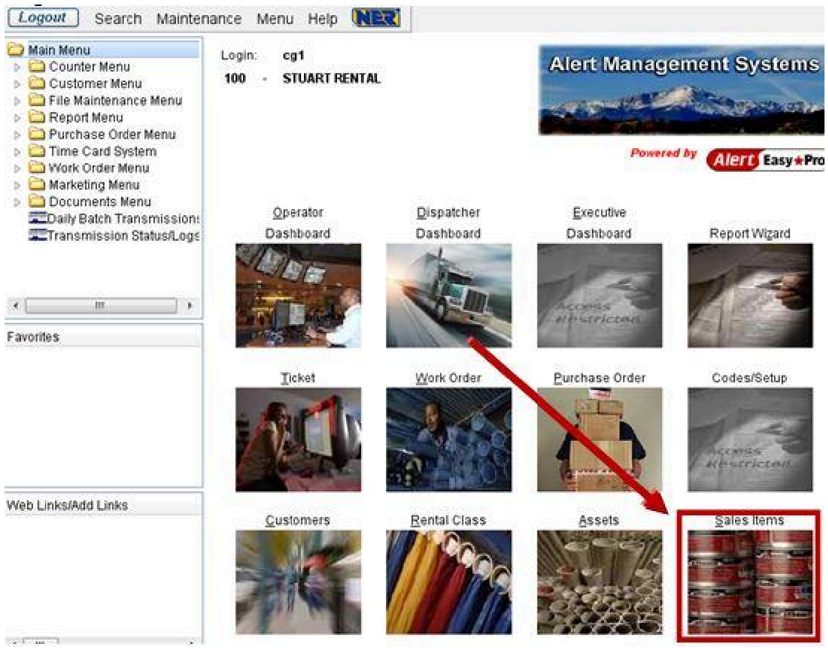
# Discount Codes, Promotions & Coupons

## Creating Discount Codes in Alert

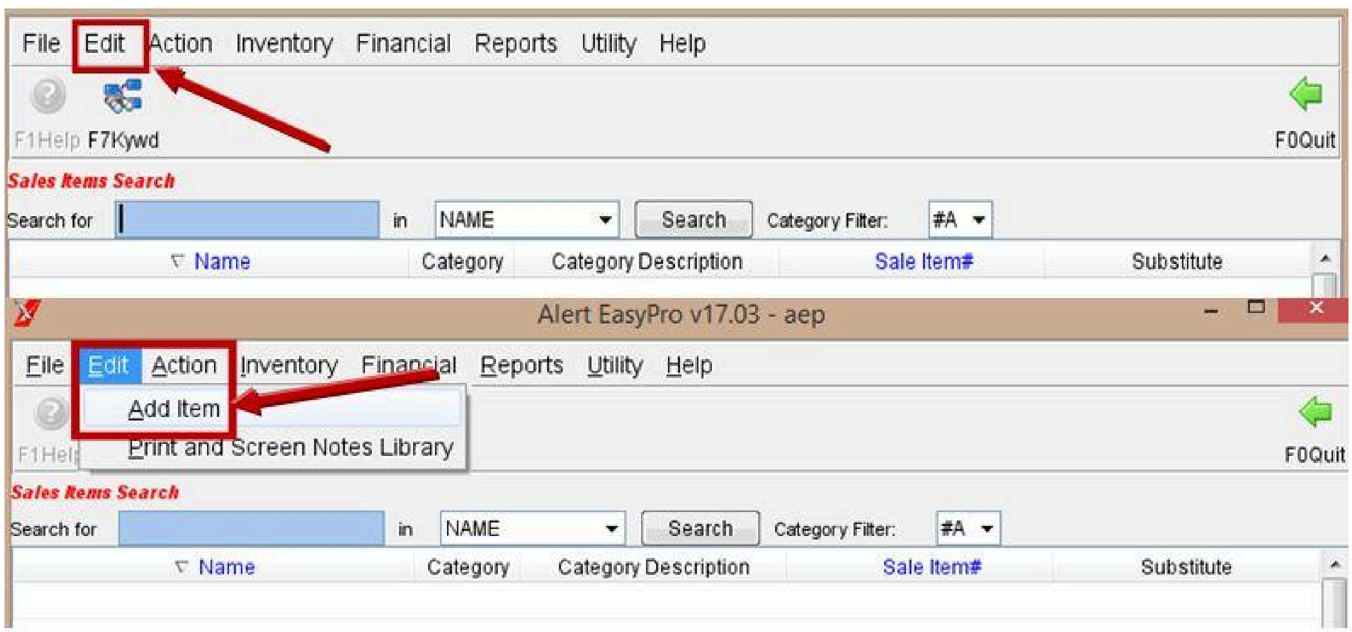
**Overview:** Seasonal and specified discount codes are used as promotions and can be set as a flat rate or a percentage off of a qualifying reservation. These codes must be created as a sales item and activated via the Sales Counter section of Alert prior to the effective date of said promotion. You must have the appropriate security level to create these codes. If you are unable to access the Sales Items > Edit > Add Item section of Alert, you will need to speak to your Alert software controller (Clara Ayala) to adjust your security access level.

### Create a Sales Item

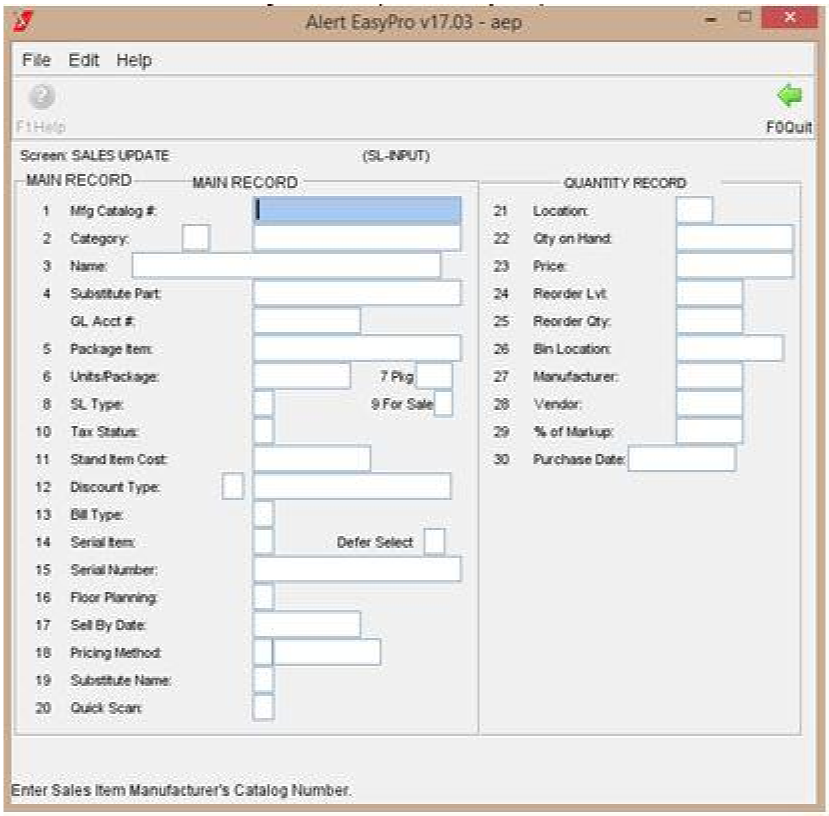
1. Log into **Alert** and select **Sales Items**



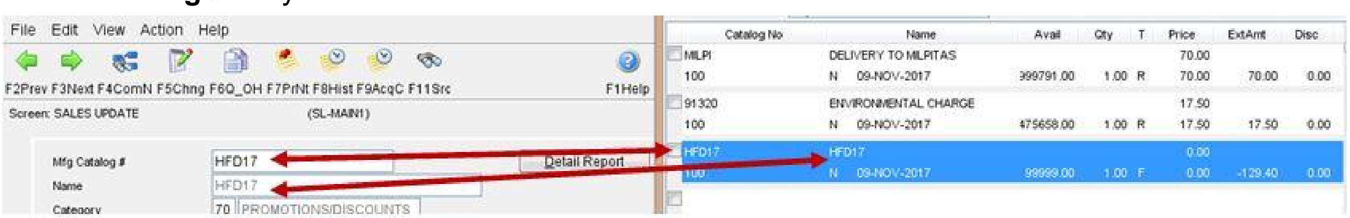

2. Click **Edit** on the top left of the **Sales Item** window and select **Add Item** from the drop down selection field.



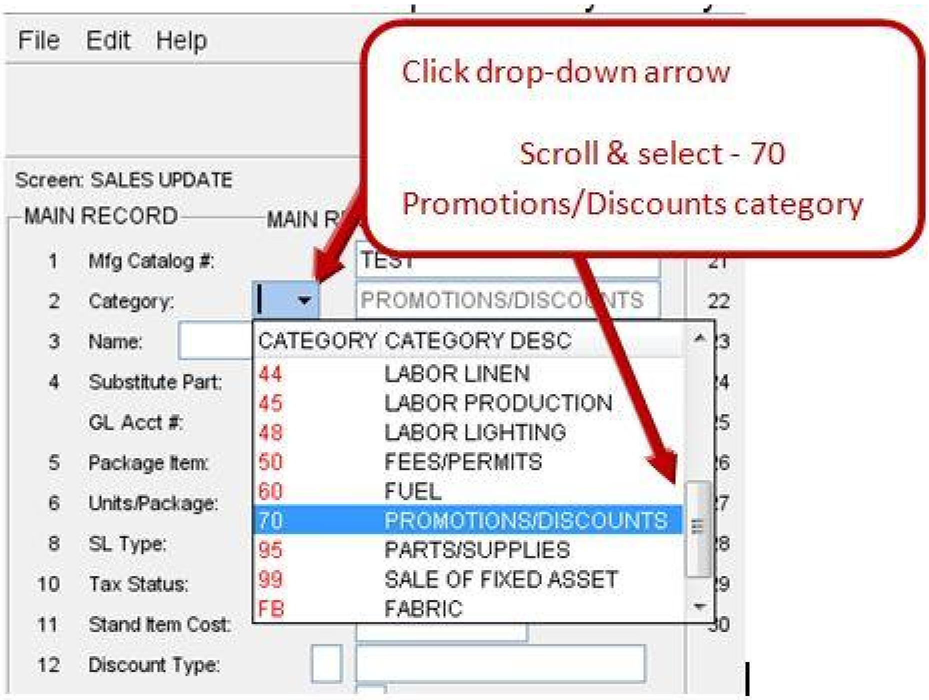

3. View the **Sales Update** (SL - Input) screen.
    a. The **Main Record** pane is to the left. The **Quantity Record** pane is to the right.



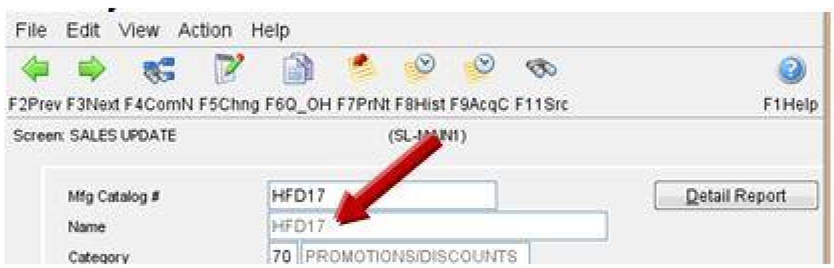

4. In the **MAIN RECORD** pane, catalog your discount code by adding a title in the **Mfg Catalog #** section and tap the Enter key on your keyboard.
    a. Note: This title will end up being the Catalog No. (RC code) you will enter in the Sales section of Alert. To reduce confusion, it is a good idea to use the same naming convention for your **Mfg Catalog #** as your item **Name.** As seen here:




5. Under the **Category** field, click the arrow to open the dropdown menu and scroll to select category 70 Promotions/Discounts. Tap Enter on your keyboard to advance to the next field.

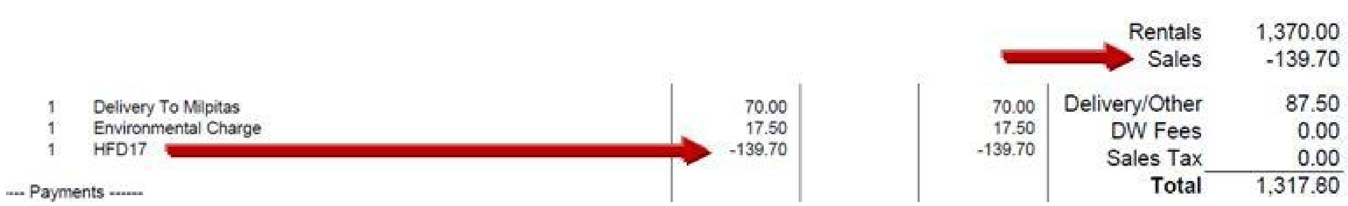



6. Name your discount code in the **Name** section.



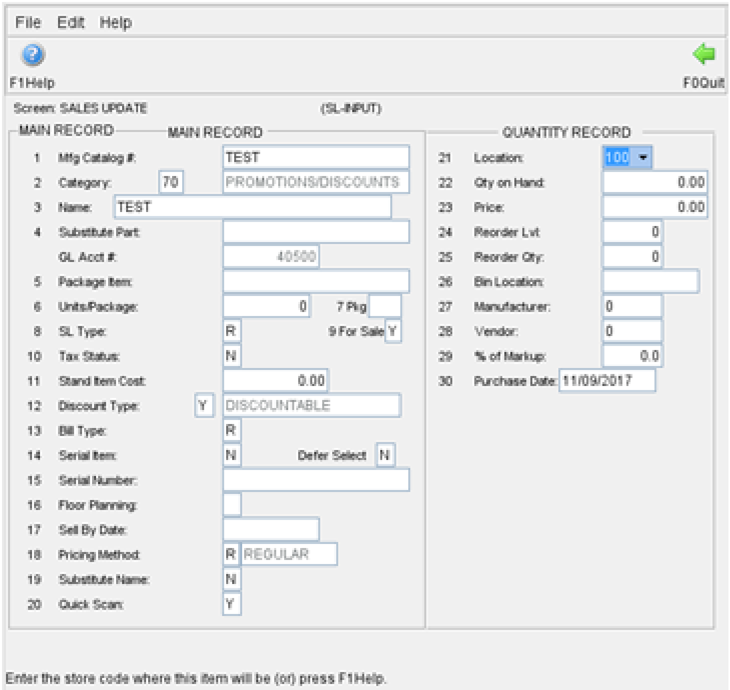

a. Note: This name will end up being the name of your sales item and will be visible to the customer. **This name needs to be identical to the code and/or name supplied on the coupon given to the customers.** This is so customers can see that we have applied their discount code to their order.

b. Note: This will not appear the same as your standard discount. It will appear as a (-) sales item cost. As seen below:

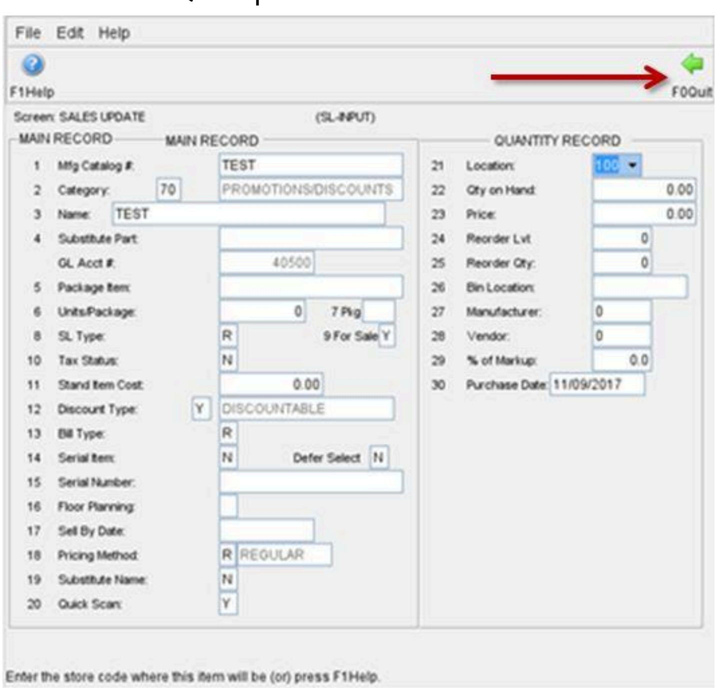



7. Leave the **Substitute Part:** field blank and tap Enter on your keyboard to advance to the next field.
    a. Note: The **GL Acct #** will autofill with the appropriate GL for the category type.
8. Leave the **Package Item:** field blank and tap Enter on your keyboard to advance to the next field.
9. Set the **Units/Packages:** field to (0)
10. Set the **SL Type:** to R - Regular
11. Set the **9 For Sale:** field to Y
12. Set the **Tax Status:** field to N
13. Set the **Stand Item Cost:** field to 0.00
14. Set the **Discount Type:** to Y - Discountable
15. Set the **Bill Type:** field to R

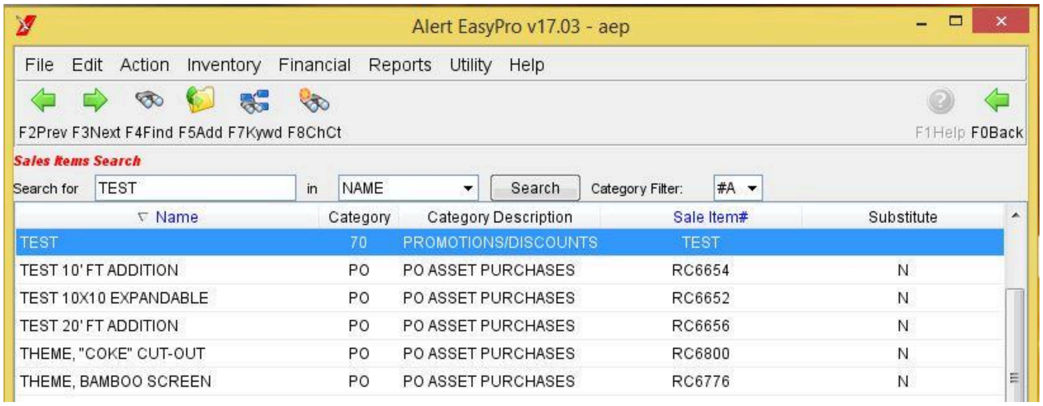
16. Tap Enter on your keyboard to advance to the **Pricing Method:** field and set it to (R - Regular)
17. Set the **Substitute Name:** field to N
18. Set the **Quick Scan:** field to Y and tap Enter on your keyboard to advance to the **QUANTITY RECORD** field. Your **MAIN RECORD** field should now appear as pictured below:



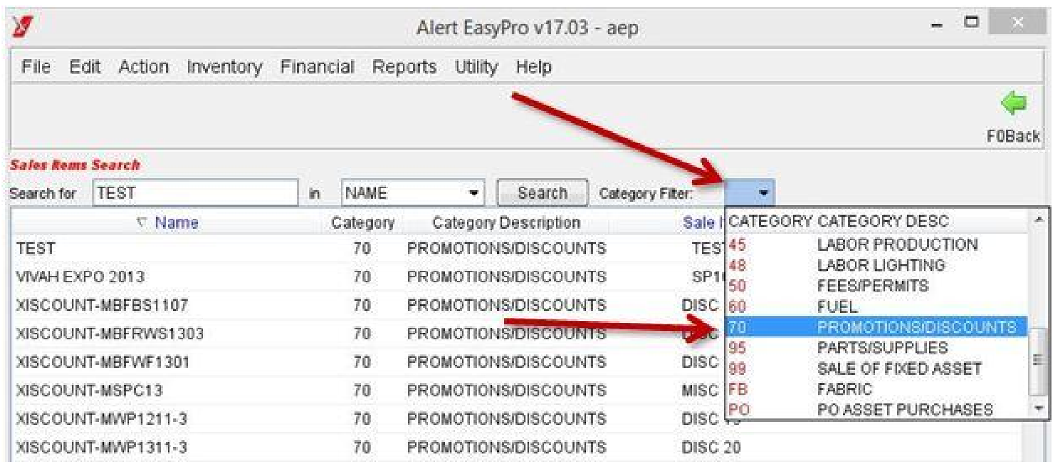

19. In the **QUANTITY RECORD** field, make sure the **Location:** field is set to (100) and tap Enter on your keyboard to advance to the next field.
20. Continue to tap Enter through to the **Purchase Date** field.
21. Set the **Purchase Date** field to the date of the start of your promotion/coupon and tap Enter.
    a. Your sales item has now been created and is active in Alert.
    b. Important: You must now back out of the newly created sales item to proceed to the coupon creation portion.
22. Select the **F0Quit** option to back out of the new sales item.



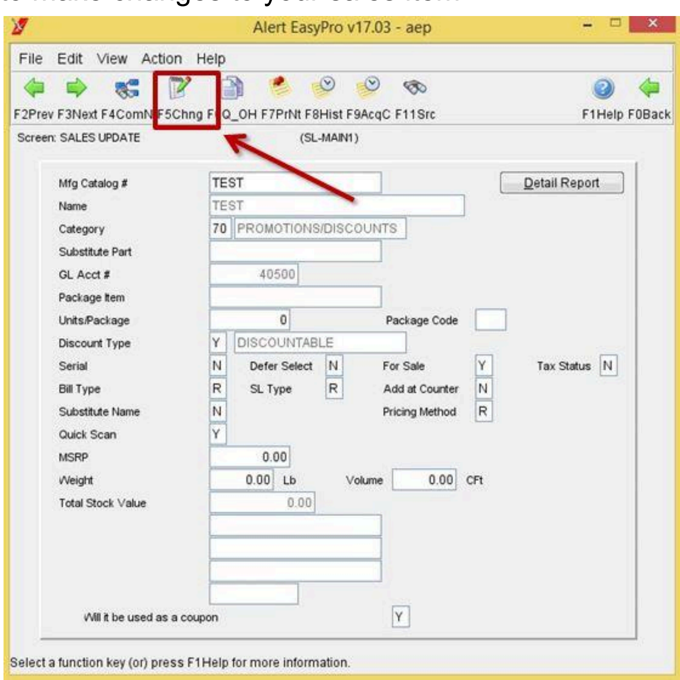
23. View the **Sales Item Search** screen and search by name for the sales item you just created.




a. You can also search by category - 70 Promotions/Discounts - by using the **Category Filter:** drop-down and selecting category 70

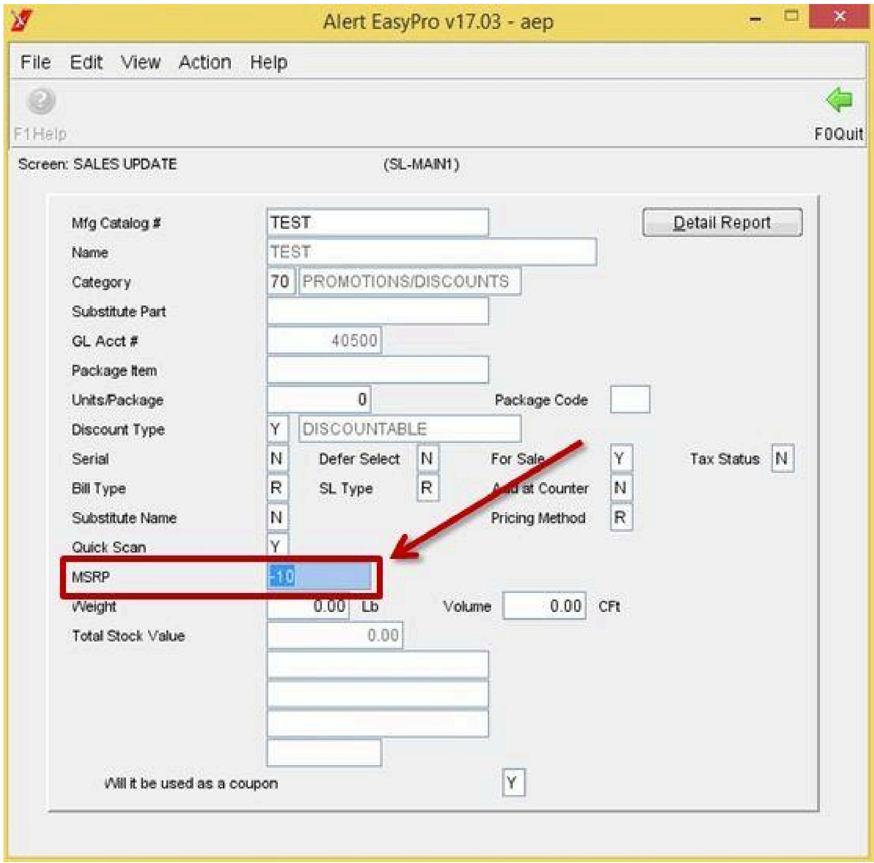



24. View the **Sales Update:** screen for the sales item you have just created and select the **F5Chng** button to make changes to your sales item.

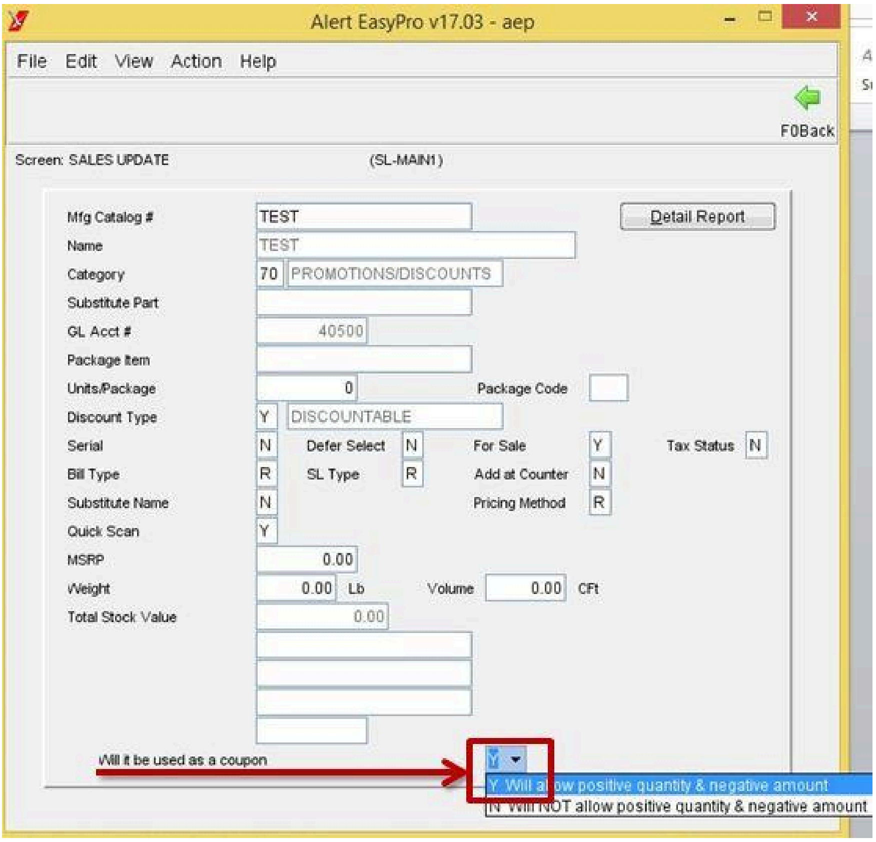



25. Set the **MSRP** to a **negative number (-xx)** that reflects the discount/coupon amount.

a. I.e. The below coupon is for a 10% off promotion. Note: Alert does not calculate for percentages. This must be done manually. It is best practice to set the **MSRB** simply as a reminder to Sales & CS what the percentage off for this promotion is. (-10 = 10%, -15 = 15%, -20 = 20% etc. etc.) If the percentage is not manually calculated and entered in the Sales Item category of the ticket when the quote/reservation/contract is being created, it will default to the Sales Item MSRP in a dollar amount. (-10 = (-)$10, -15 = (-)$15, -20 = (-)$20) **THE DISCOUNT/COUPON AMOUNT MUST BE MANUALLY CALCULATED BY THE TICKET CREATOR TO REFLECT THE ACCURATE DISCOUNT AMOUNT.**




26. Tap Enter on your keyboard to cycle through to the **Will it be used as a coupon** field (the last option) on the **Sales Update** screen.
27. Convert the Sales Item to a coupon by selecting **Y** in the **Will it be used as a coupon** drop-down field and tap Enter on your keyboard to save the change.




a. Your Sales Item Coupon is now created and active in Alert.

## Applying a Coupon in Alert

**Overview:** Seasonal and specified discount codes are used as promotions and can be set as a flat rate or a "percentage off" of qualifying rental items. These codes (Coupons) can be applied to a Quote, Reservation, or Contract. Coupons are applied to the ticket in the **Sales Item** field. The discount coupon can be adjusted or removed at any time, just like a standard sales item (i.e. propane, wind clips, ect. ect.)

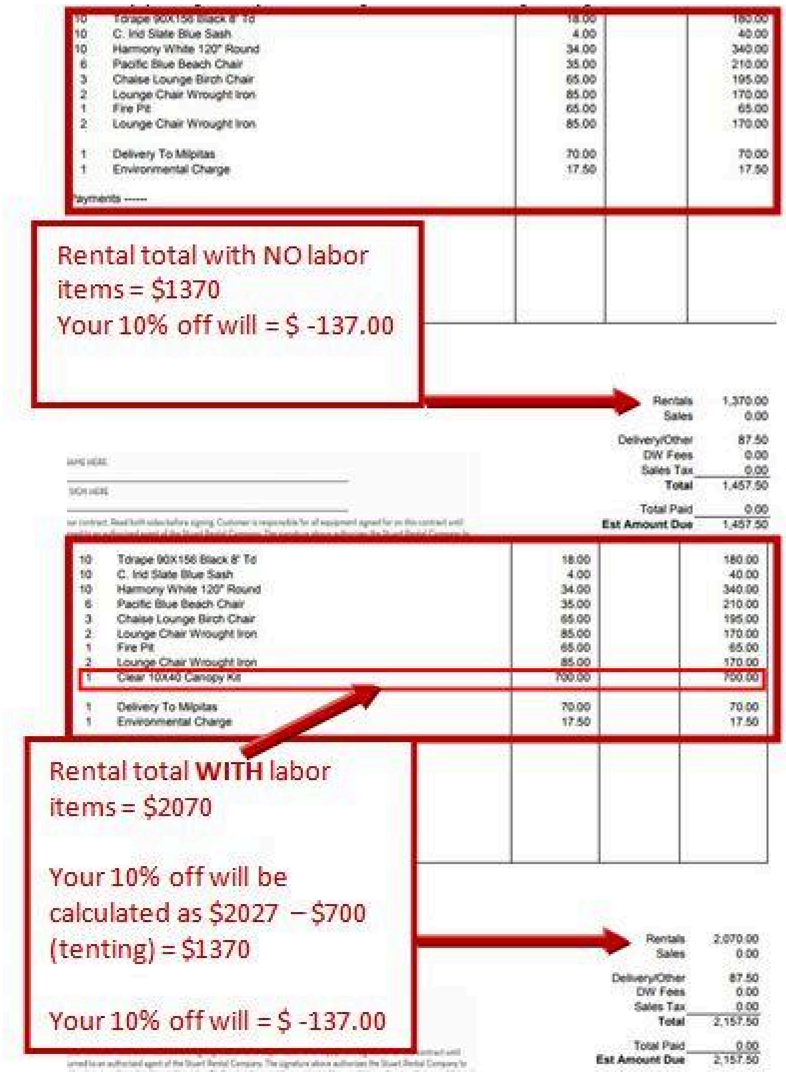
**Note: Alert does not calculate for percentages. This must be done manually**. If the "percentage off" of the rental items is not manually calculated and entered in the **Sales Item** category of the ticket when the quote/reservation/contract is being worked on, it will default to the Sales Item MSRP in a dollar amount. (-10 = (-)$10, -15 = (-)$15, -20 = (-)$20) **THE DISCOUNT/COUPON AMOUNT MUST BE MANUALLY CALCULATED BY THE TICKET OPERATOR TO REFLECT THE ACCURATE DISCOUNT AMOUNT.** A negative (- $xx) price has been pre-set to remind you what the percentage off for applied coupon should be manually adjusted to (-10 = 10%, -15 = 15%, -20 = 20% etc. etc.).

**Note: We DO NOT combine discounts. This includes industry discounts. Your client must choose which one discount they would like to apply to their order.**

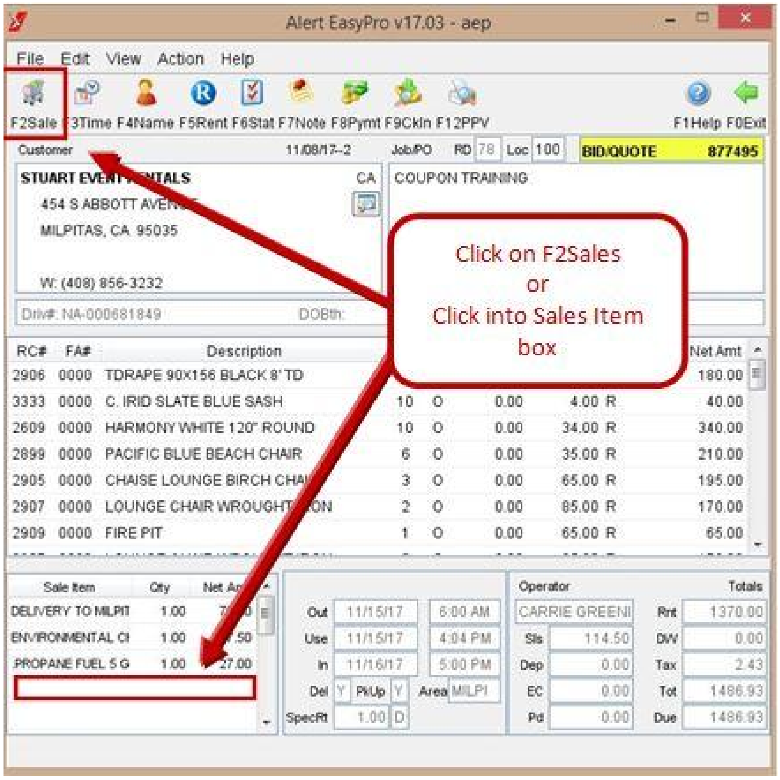
**Note: We DO NOT discount labor items. All labor items (i.e. Tenting, Pipe & Drape, Swaging, etc. etc.) cost must be manually deducted from the rental items cost PRIOR to calculating and applying the discount coupon code.**

**This example uses the HFD17 - 10% off qualifying rental items Holiday Food Drive coupon.**

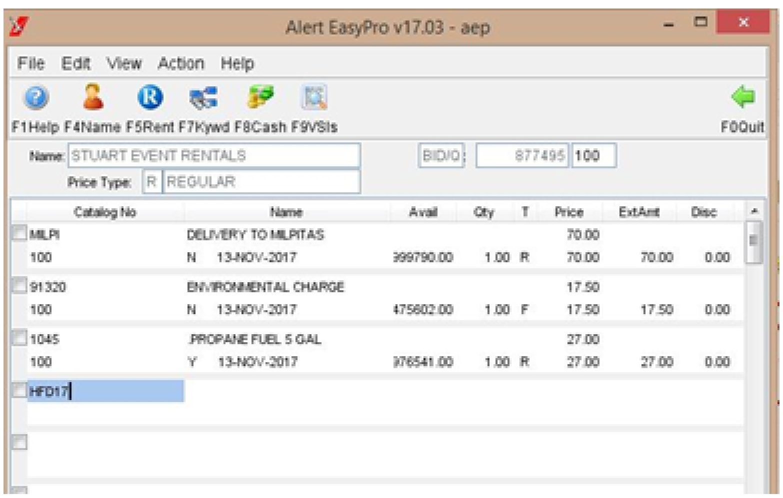
1. Load the ticket you would like to apply the discount coupon to.
2. Review the **Rnt** total of the ticket and calculate the total deduction you would like to apply to the ticket.
   a. This will be the rental total (-) any labor item (i.e. tenting, pipe & drape, etc. etc.) and (-) any Napa Valley Linens they may have on the order.



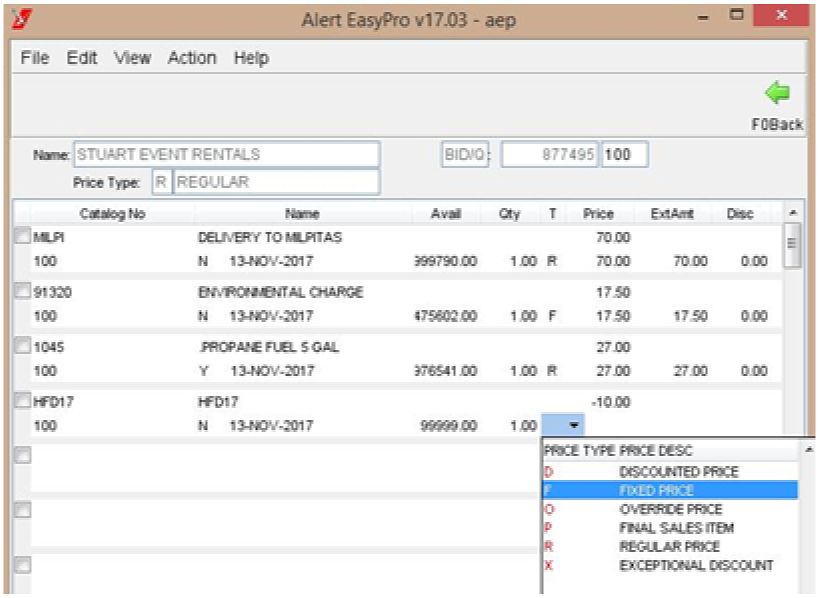

3. Click into the **Sales Item** field, select the **F2Sale** button, or tap the **F2** key on your keyboard to enter the **Sales Item** pane (window/screen).



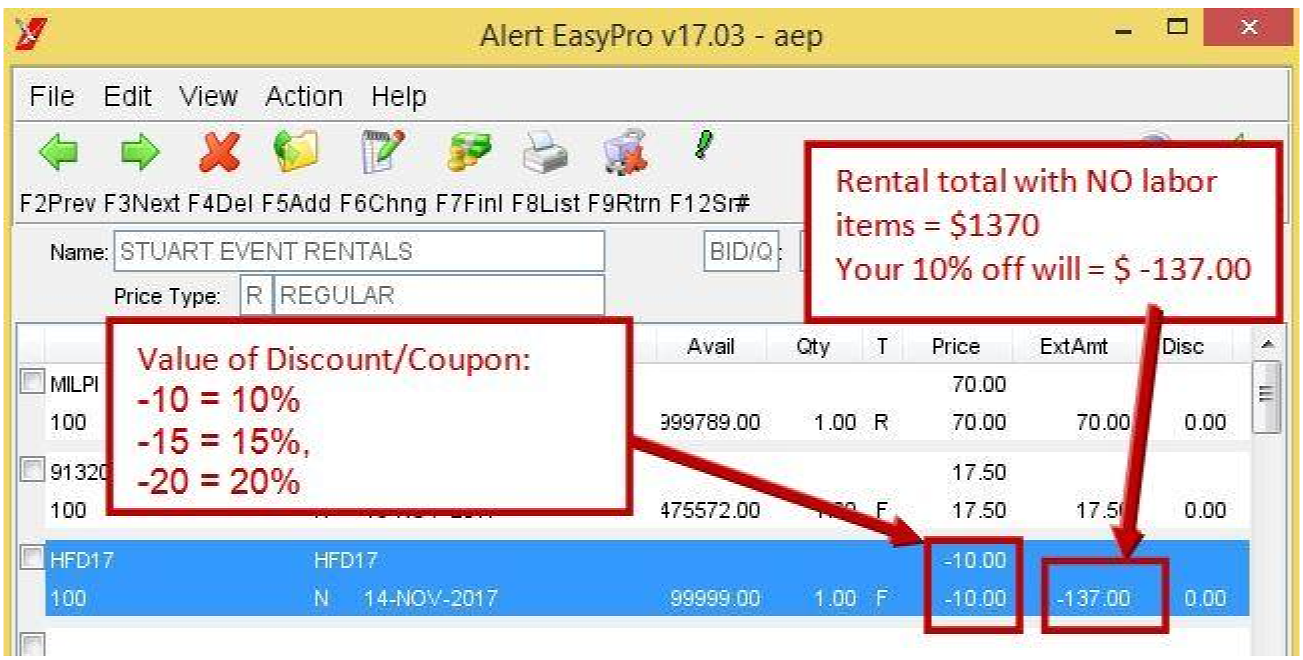

4. Type in the discount code you would like to apply. This code should be supplied by the client via their sales rep and/or coupon flyer.
   a. While in the **Sales Item** pane, you can also search for the code by name by selecting **F7Kywd**.




5. Add a quantity of 1 and tap Enter on your keyboard.
6. **VERY IMPORTANT** - You must set the **Rate Type** to **F - Fixed**




7. Apply your manually calculated figure from **STEP 2** and tap Enter on your keyboard. **THIS AMOUNT MUST BE ENTERED AS A NEGATIVE (-) VALUE** for the discount to apply correctly.
   a. The default price of a discount/coupon has been set as a reminder of the percentage off the code is for. (-10 = 10%, -15 = 15%, -20 = 20%, etc. etc.)




   b. Your discount coupon has now been applied.
   c. Note: This will not appear the same as your standard discount. It will appear as a (-) sales item cost. As seen below:

| | | | |
|---|---|---|---|
| 1 | Delivery To Milpitas | 70.00 | 70.00 |
| 1 | Environmental Charge | 17.50 | 17.50 |
| 1 | HFD17 | -137.00 | -137.00 |

- Payments ------

| | |
|---|---|
| Rentals | 1,370.00 |
| Sales | -137.00 |
| Delivery/Other | 87.50 |
| DW Fees | 0.00 |
| Sales Tax | 0.00 |
| **Total** | 1,320.50 |
| Total Paid | 0.00 |
| **Est Amount Due** | 1,320.50 |

d. Note: When you have other sales items in the sales field the discount will reflect a value of $xx less the cost of the other sales items, however, the full value of the discount has been applied. As seen below:

| | | | |
|---|---|---|---|
| 1 | Delivery To Milpitas | 70.00 | 70.00 |
| 1 | Environmental Charge | 17.50 | 17.50 |
| 1 | .Propane Fuel 5 Gal | 27.00 | 27.00 |
| 1 | HFD17 | -137.00 | -137.00 |

- Payments ------

10% of 1370 = -137
Less the $27 for Propane
Sales = -110.00

| | |
|---|---|
| Rentals | 1,370.00 |
| Sales | -110.00 |
| Delivery/Other | 87.50 |
| DW Fees | 0.00 |
| Sales Tax | 2.43 |
| **Total** | 1,349.93 |
| Total Paid | 0.00 |
| **Est Amount Due** | 1,349.93 |

Williams Accounts & Passwords

## **Social Media:**

**Ipad:**

Email: Marketing@willparty.com

Phone number: MC cell

Password: Socialparty845

**Instagram**

Username: Marketing@willparty.com (@williamspartyrentals)

Password: Socialparty845

**Twitter:**

Username: Marketing@willparty.com (@willparty)

Password: Socialparty845

**Facebook:**

Admin: Facebook and Password- Page attached to acct.

Must be added to make changes or respond to customers.

**Pinterest:**

Username: Marketing@willparty.com

Password: Socialparty845

**Blogger: (Attached through Google Acct.)**

Username: marketing@willparty.com

Password: Socialparty845

**YouTube: (Attached through Google Acct.)**

Username: Marketing@willparty.com

Password: Socialparty845

**Yelp:**

Username: Marketing@willparty.com

Password: Socialparty845

**Smartshoot: Yelp Video**

Username: Marketing@willparty.com

Password: Socialparty845

## Marketing Tools:

**Hootsuite:**

Username: marketing@willparty.com

Password: Socialparty845

**Mailchimp:**

Username: wpronline1@gmail.com

Password: Socialparty845!

### Google Acct:

Email: Marketing@willparty.com

Password: Socialparty845

### Allseated:

Username: Sydney@willparty.com

Password: Socialparty845

**Avery:**

Username: Marketing@willparty.com

Password: Socialparty845

**Weddingventure.com:**

Username: marketing@willparty.com

Password: Socialparty845

Weddingwire.com

## Advertising:

**AdWords: (Attached through Google Acct.)**

Username: marketing@willparty.com

Password: Socialparty845

**Adtrack.voicestar.com**

Username: marketing@willparty.com

Password: qazwer12

**Bing:**

Username: willpartylp@outlook.com

Password: qazwer12

**Logical Positions:**

Username:Erica@willparty.com

Password: Socialparty845

## Magazine subscription/ Event Tickets:

**Discount Mags:**

Username:Marketing@willparty.com

Password: Socialparty845

**<u>Eventbrite:</u>**

Username: Marketing@willparty.com

Password: Socialparty845

**https://color-hex.org/color/340e30**