User Manual

Lilac Ventures Website

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Introduction

Lilac Ventures provides personalized financial consulting and coaching to people interested in becoming more knowledgeable and responsible regarding their finances. The client keeps track of their customers' coaching progress and works with their customers to help them meet their financial goals.

The client (Gail Tateyama) needs a user-friendly website for their financial coaching business. The website needs to be both ADA-compliant and mobile-friendly. The website must incorporate a system that allows the client to update it as required and provide basic maintenance features. The website must include interactive forms for customers; a customer account portal will facilitate submitting these forms. The account portal will allow customers to fill out and submit forms and have an inbox, making sending and receiving messages from the client easy and accessible. The portal will enable customers to create and view their appointments. An appointment will be made through the website's calendar and scheduling page.

The website will also need to provide a system for processing payments. This system needs to be both accessible and secure. Security of the client's and customer's financial data is critical. Keeping this information safe is a top priority for building the payment system. Additionally, the client needs a company email address. The team will set up an email address related to the business's name and website. Lastly, the client needs a data management system. This system is separate from the website and is accessible only by the client – Gail Tateyama. The system will capture analytics about traffic to the website, including names, addresses, phone numbers, email addresses, and birthday information where available. This system will need to generate reports for the client.

Table of Contents:

Customer Portal

Progress Bar

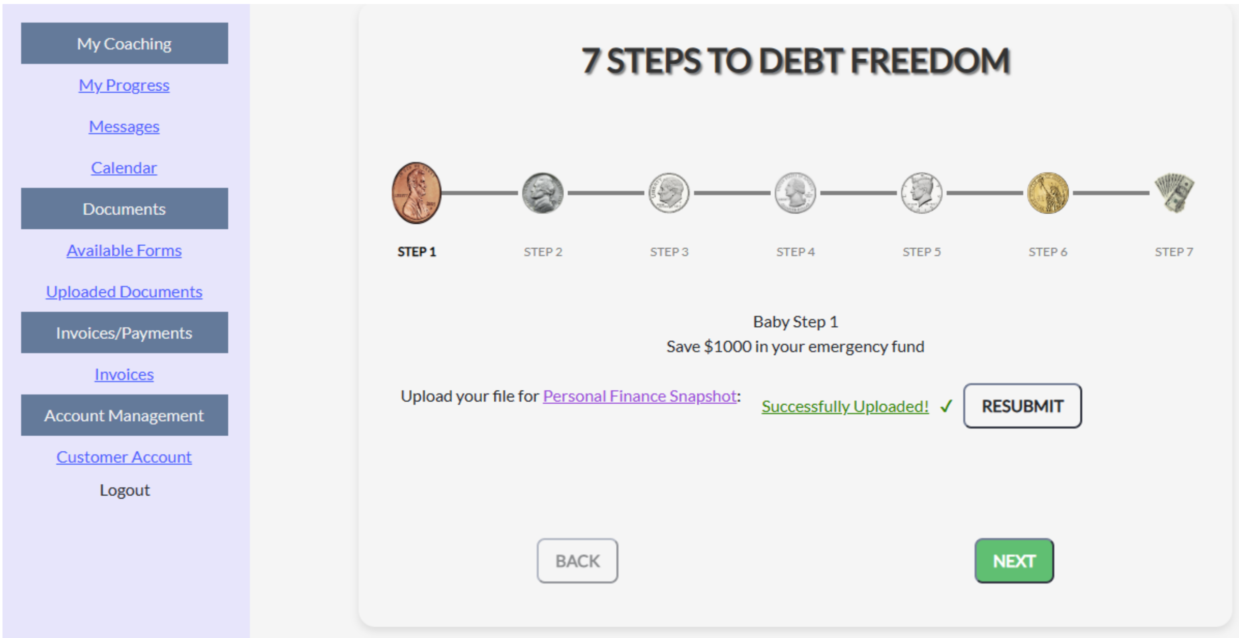


Figure: PB-01

As a customer, you can navigate through the progress bar, as shown in *Figure PB-01*, by pressing the "BACK" and "NEXT" buttons. Pressing those buttons will move you between the seven steps in the progress bar. If you are on the first step, you cannot press the "BACK" button. If you are on the last step or if the admin has not yet manually increased your current step, you cannot press the "NEXT" button. To move on to the next step, the admin must manually adjust the progress for the customer; then, the customer can move freely up to their current progress.

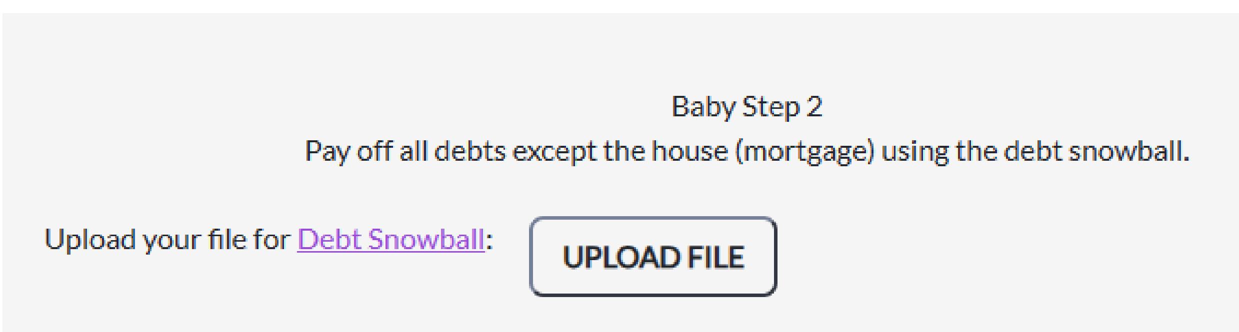


Figure: PB-02

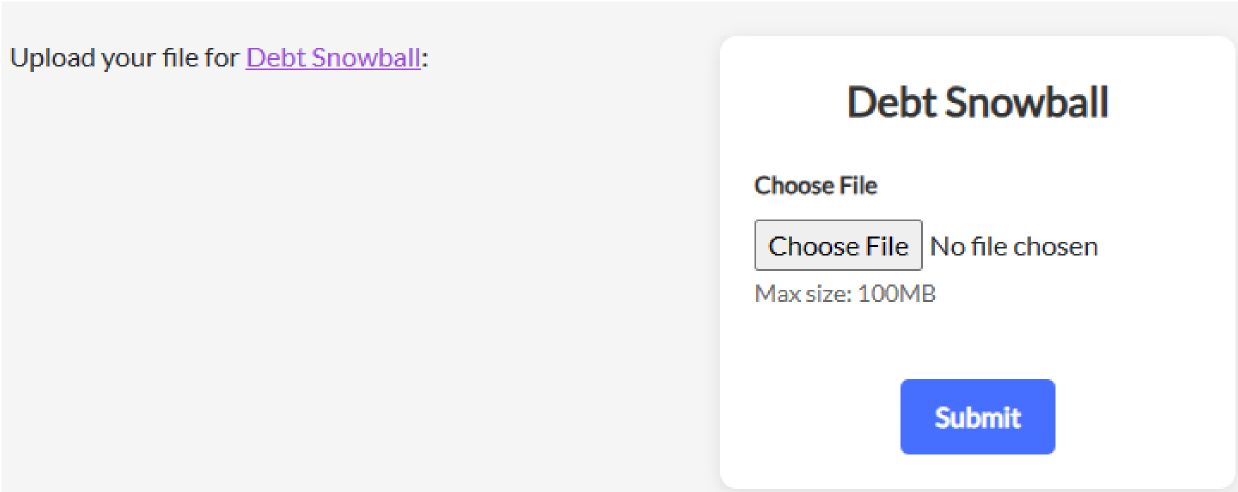


Figure: PB-03

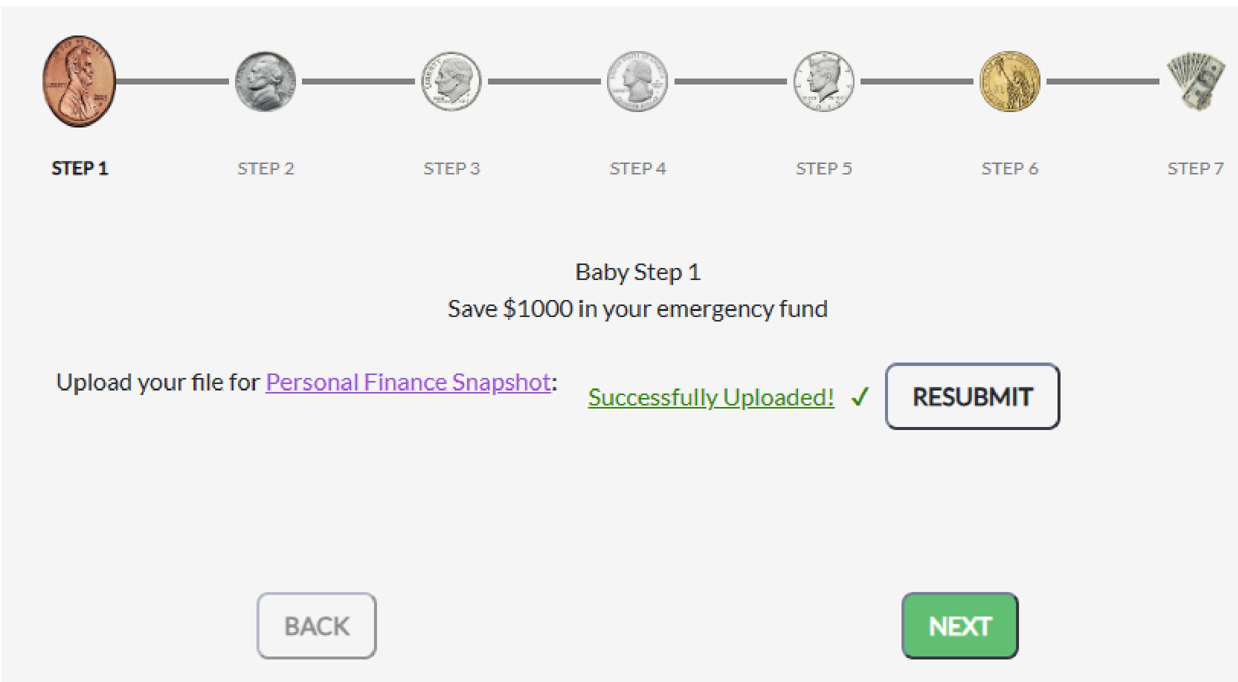


Figure: PB-04

Within each step, there may be forms that the customer has to fill out. They can download the form by clicking the form's name, which is in purple and underlined – see *Figure PB-02*. After filling out that PDF, they may press the button to upload the file, which will open a popup to allow them to choose a file and submit it (*Figure PB-03*). Once uploaded, the customer can then download their uploaded file by clicking the “Successfully Uploaded” message (*Figure PB-04*). They may also press the resubmit button to re-upload a file.

Available Forms

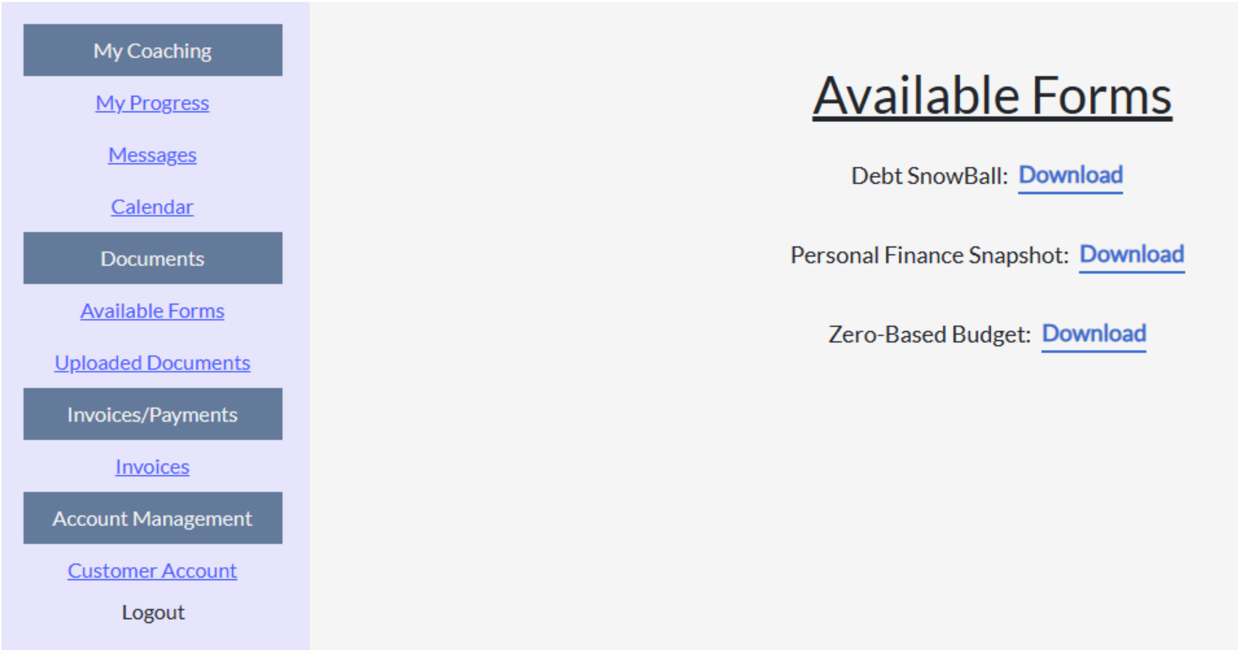


Figure: AF-01

The customer may navigate to the available forms page by selecting the "Available Forms" button on the left-hand side navigation bar (*Figure AF-01*). Once selected, they will see a page similar to *Figure AF-01* with a list of the available forms and a button to download them.

Uploaded Documents

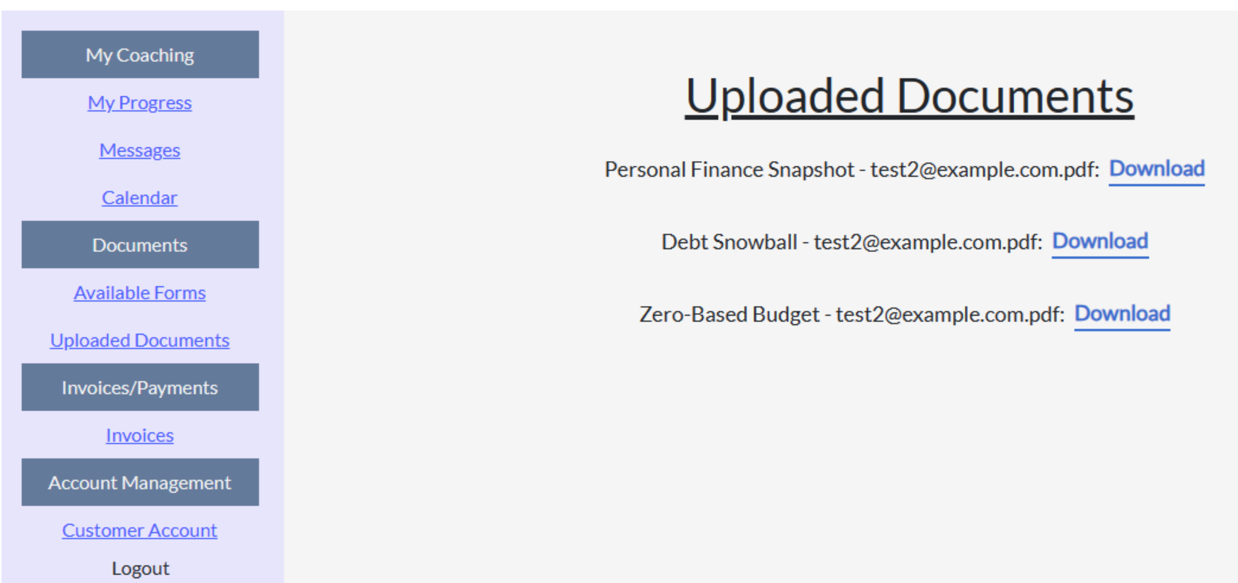


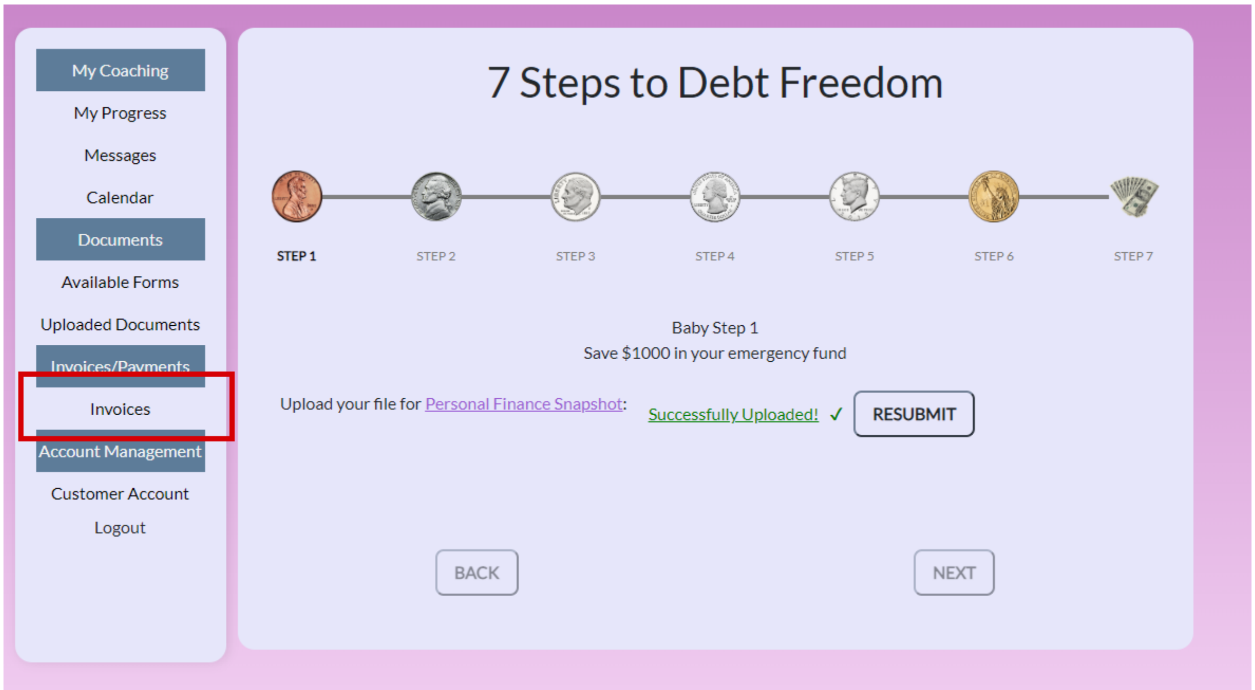
Figure: UD-01

The customer may navigate to the available forms page by selecting the “Uploaded Documents” button on the left-hand side navigation bar (*Figure UD-01*). Once selected, they will see a page similar to *Figure UD-01* with a list of the documents they have uploaded and a button to download them.

Accessing and Paying Invoices

Check Invoices

1. Navigate to the `Invoices` link on the left side of the customer portal

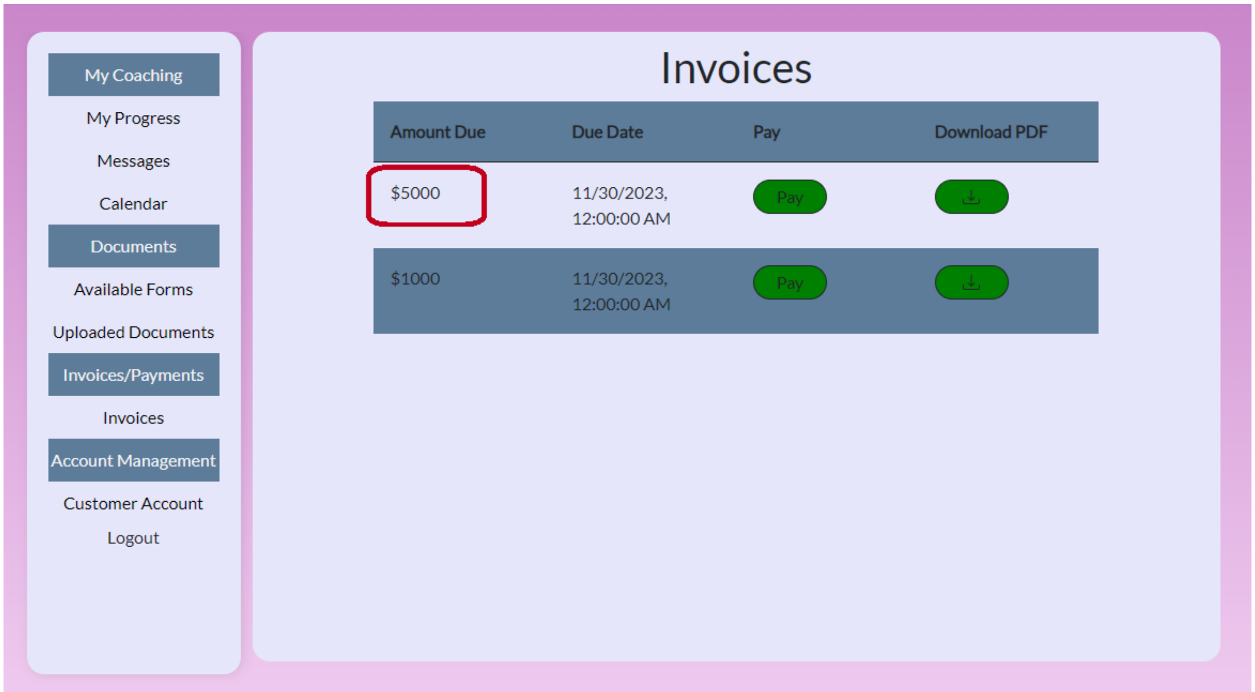


2. Unpaid invoices will appear in the panel on the right

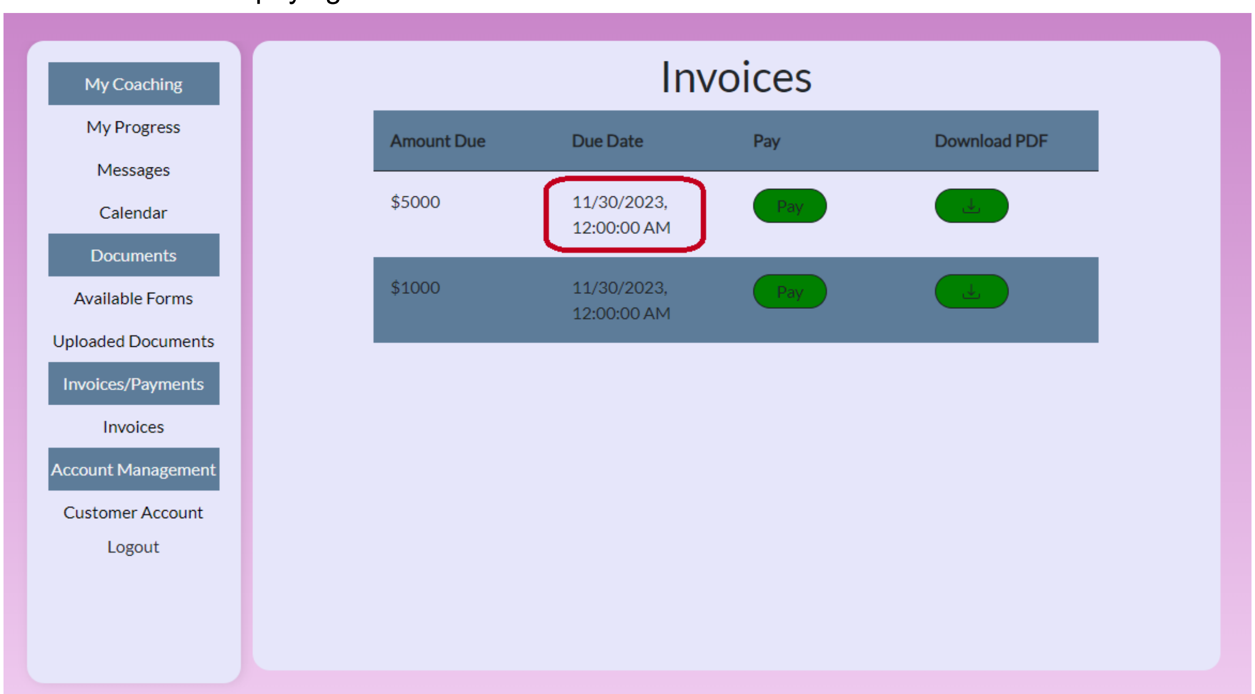
Paying Invoices

1. Each row in the table is an invoice pending payment

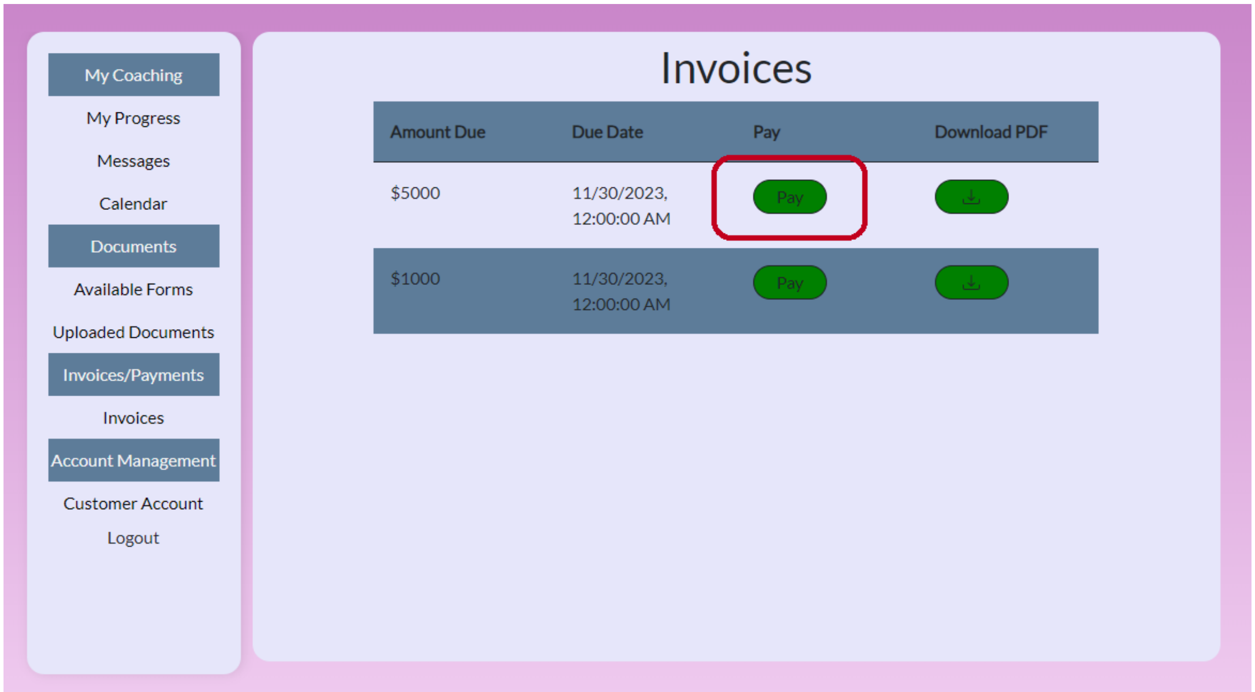
2. The amount due is in the far left column



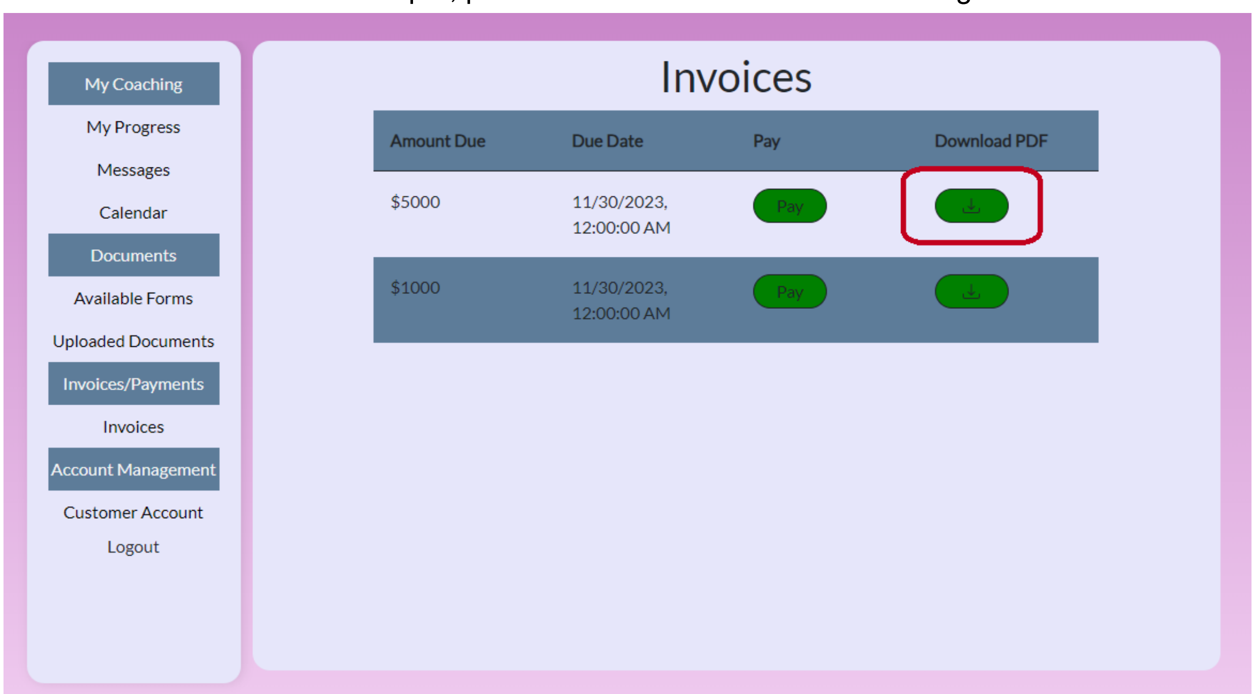
3. The due date for paying the invoice is in the next column



4. To pay the invoice, press the pay button. You will be navigated to Stripe's payment processing page to finish the transaction



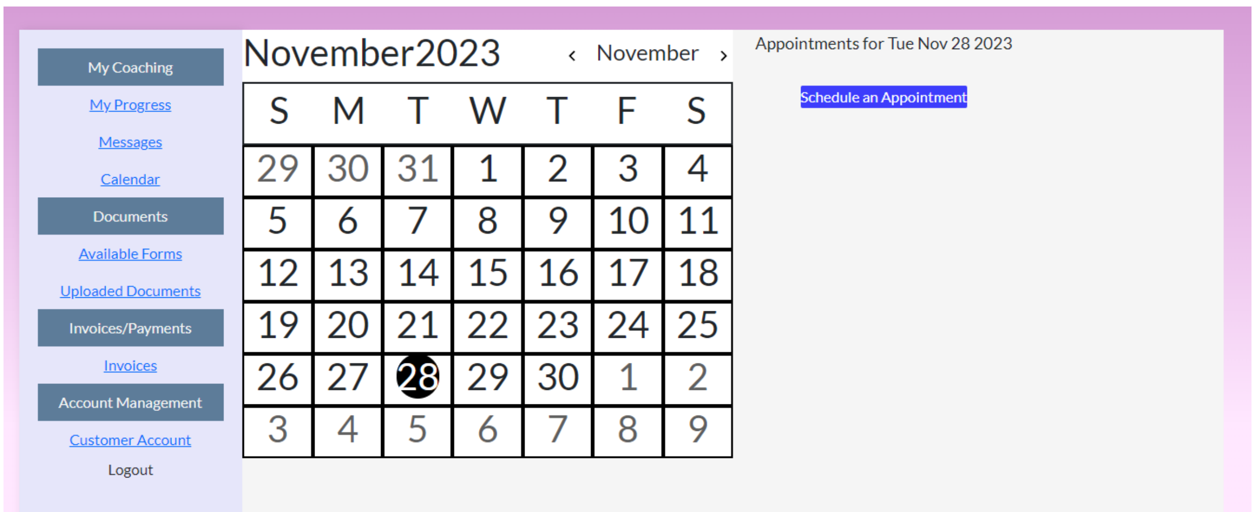
5. To download an invoice as a pdf, press the download button in the far right column



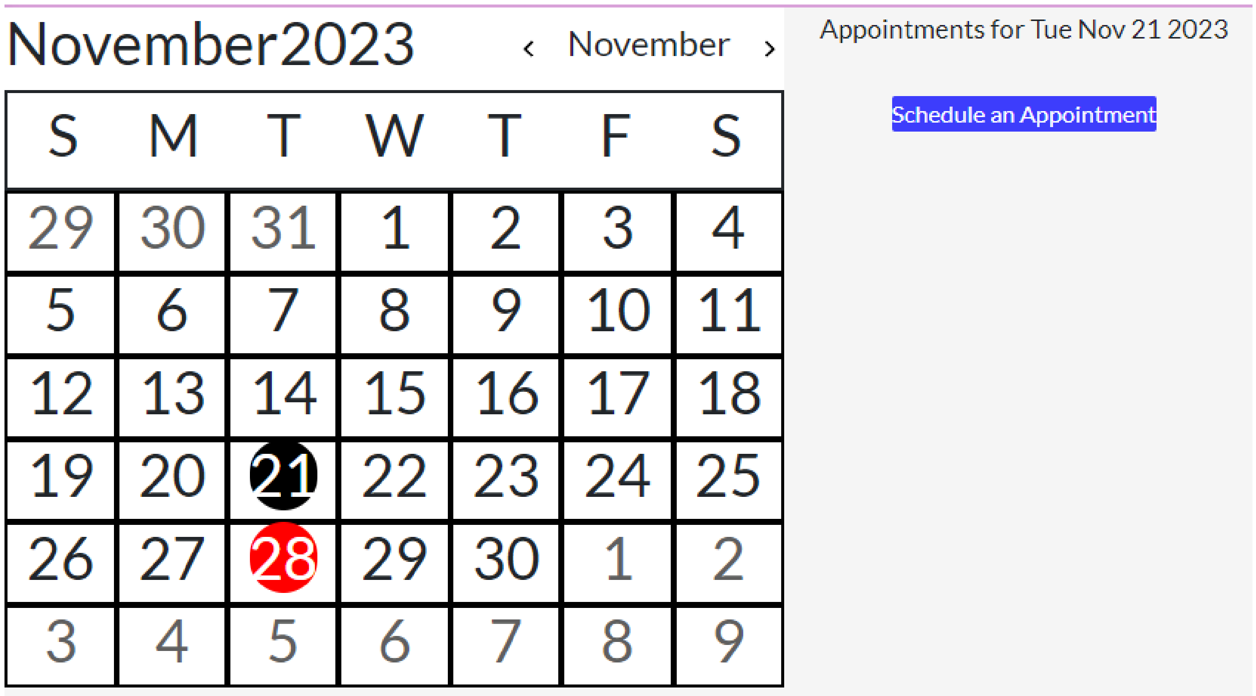
Appointment Calendar

Navigating the Calendar

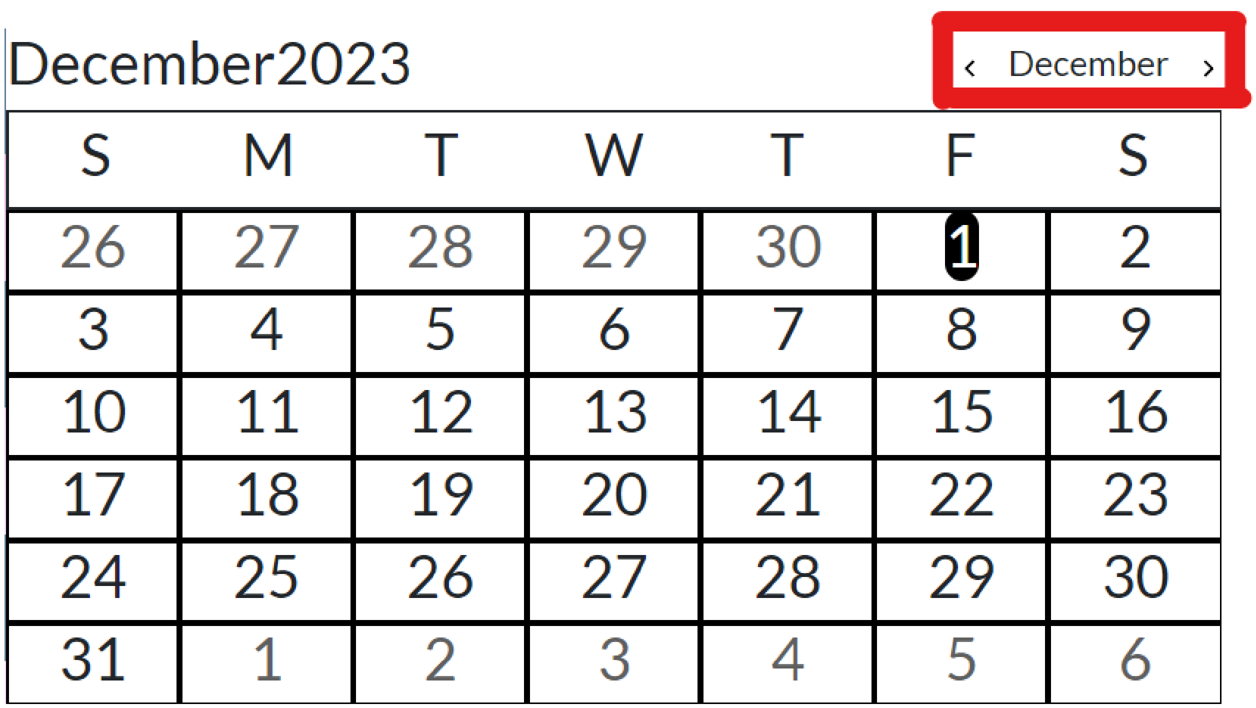
Click the “Calendar” link on the left side of the portal. This will open the Appointment Calendar. By default, the current date will be selected and highlighted in black. Any dates that already have appointments scheduled on them will be underlined.



Click on a date in the calendar to select it. Selecting a date will highlight the date in black on the calendar. It will also display any appointments for that date. If there are no appointments, the section for listing appointments will be blank. The current date will remain highlighted in red.

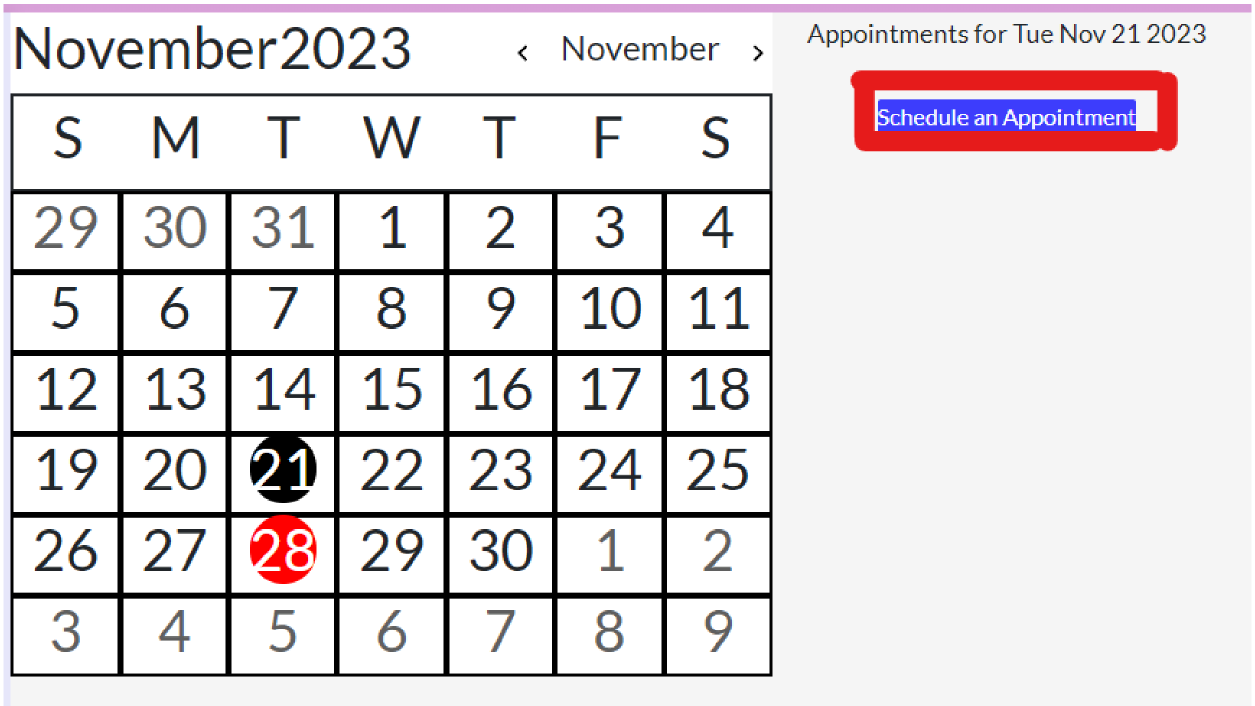


To change the month on the calendar, click on the arrows in the top right of the calendar.

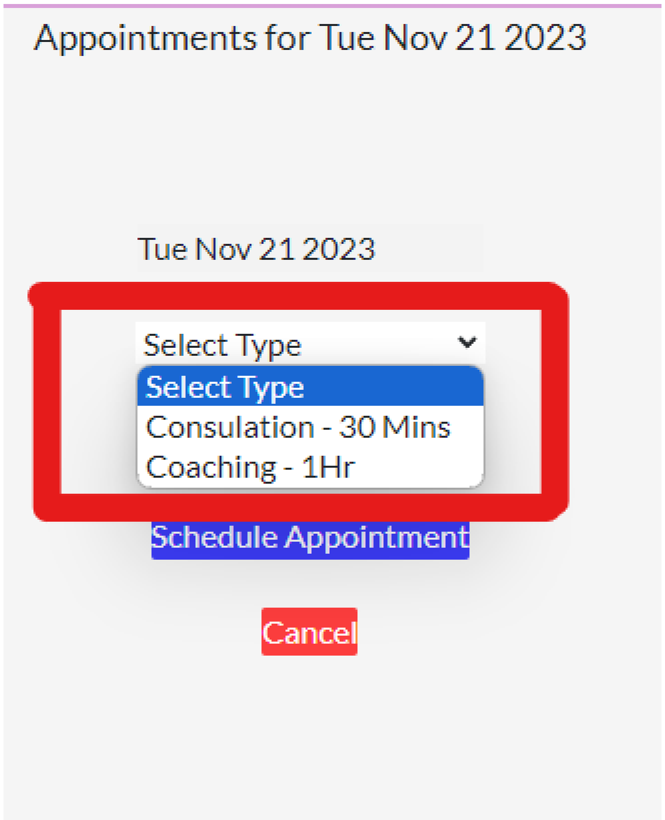


Setting Appointments

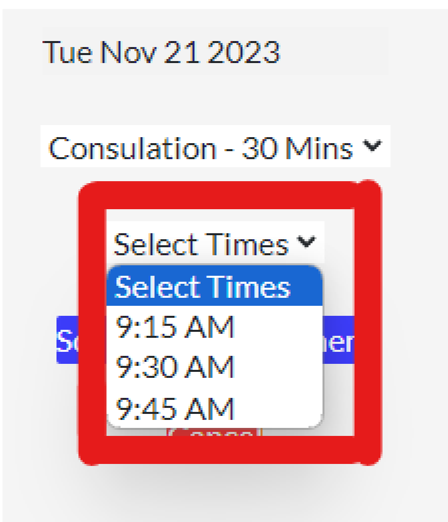
To set an appointment, first select the date you wish to schedule the appointment on. Then click the “Schedule an Appointment” button.

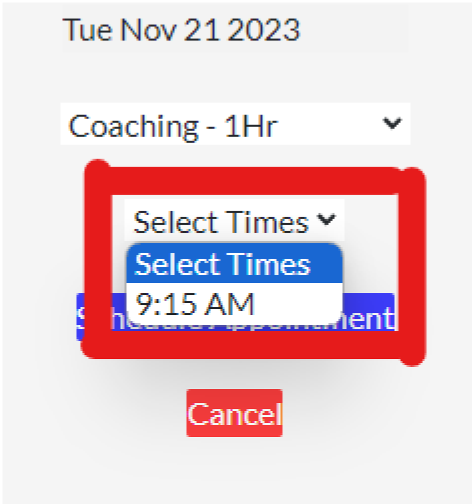


Select the appointment type from the drop down menu

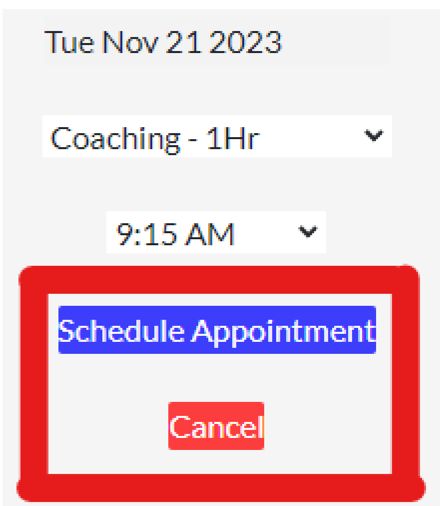


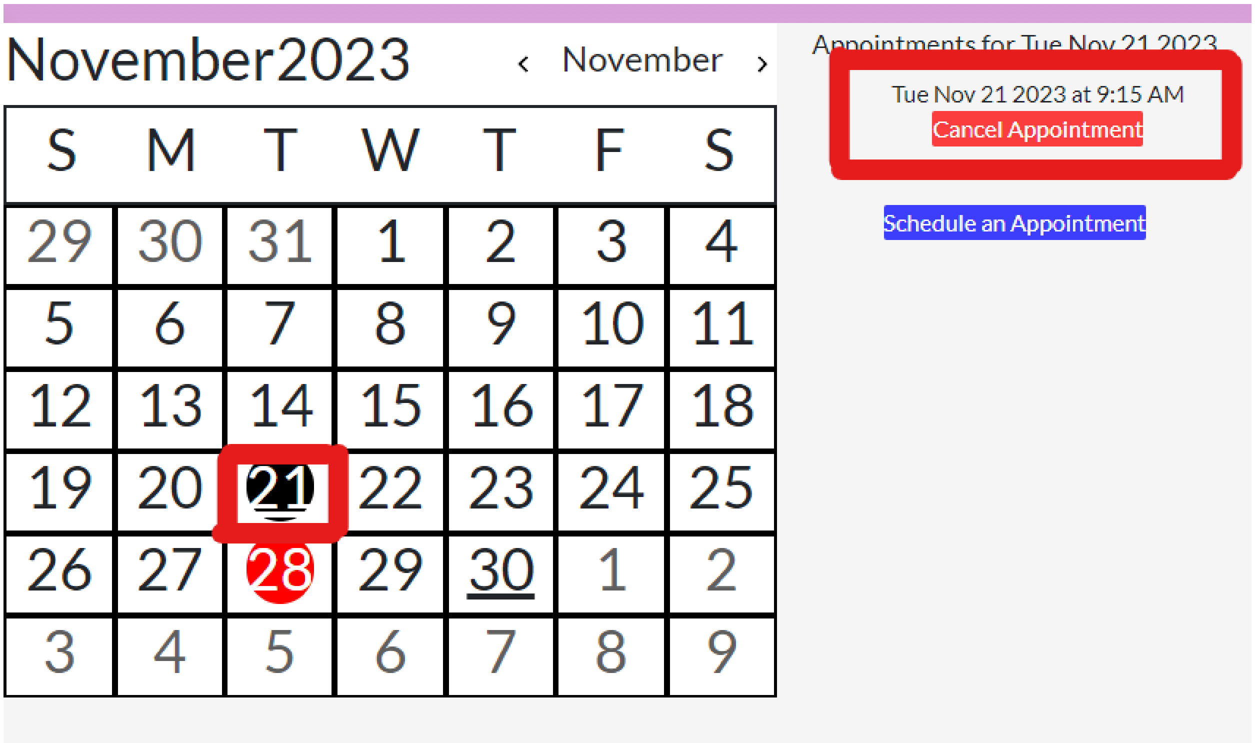
A drop down menu to select a time will appear. Select a time for the appointment. Available times are set by the administrator and filtered by appointment length.





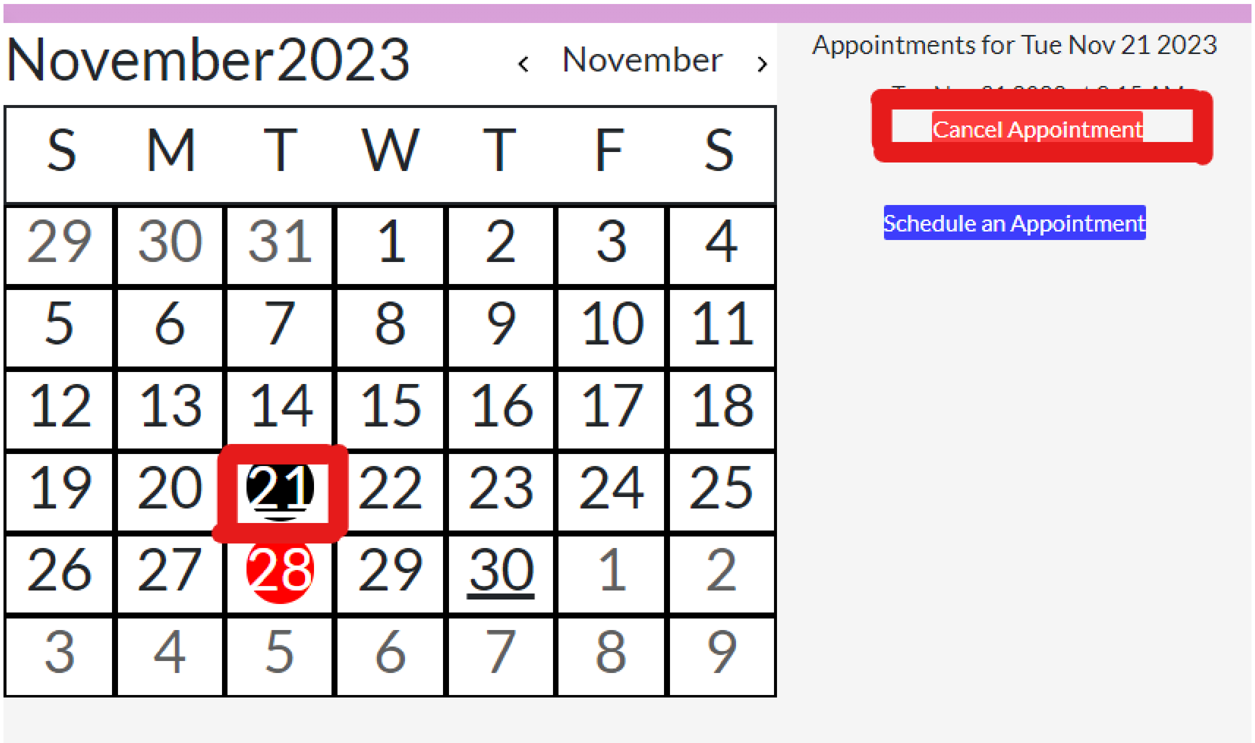
Click the “Schedule Appointment” Button to schedule the appointment. Doing so will save the appointment to the database, underline the day, add the appointment to the list of appointments for that date, send notifications to the user and admin’s inboxes, and remove the times taken by the appointment from the available time slots. Press Cancel to close the appointment setting form.



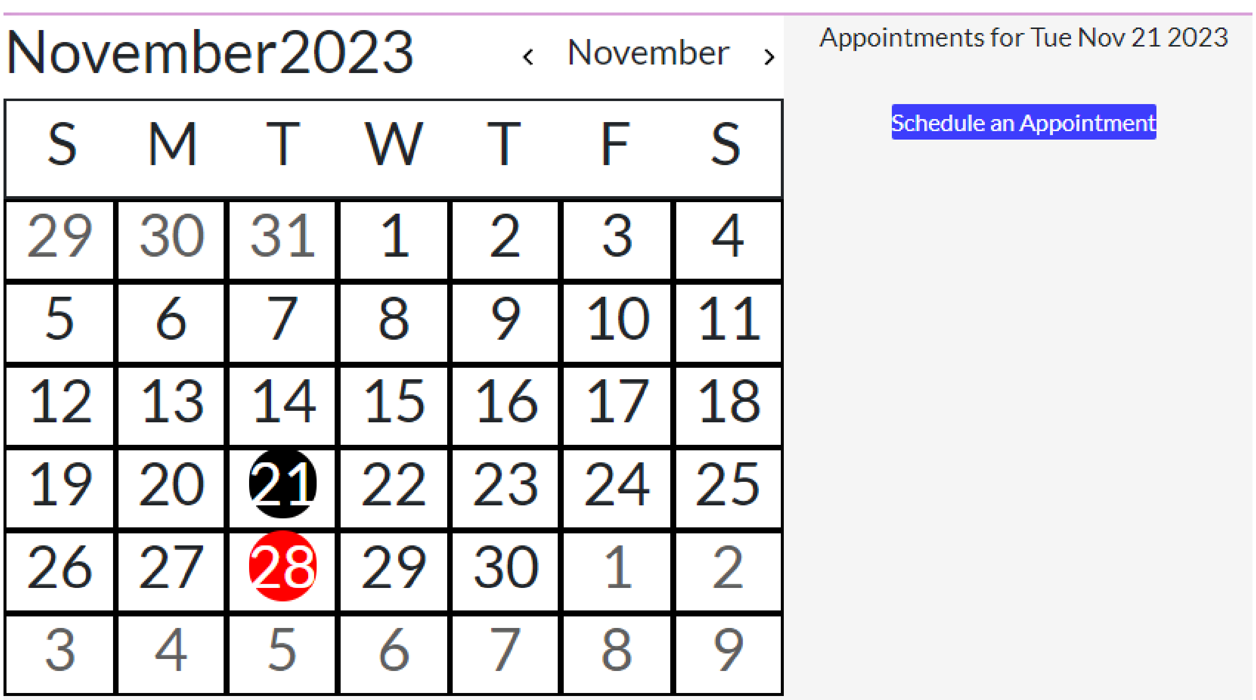


Canceling an Appointment

To cancel an appointment, select the date of the appointment, then click the “Cancel Appointment” button underneath the appointment listing.



Canceling will delete the appointment from the database, remove the underline, remove the appointment from the appointment list next to the calendar, sends a notifications to the user and admin's inboxes, and release the time taken by the appointment to other potential appointments.



Admin Portal

Viewing Newly Uploaded PDFs

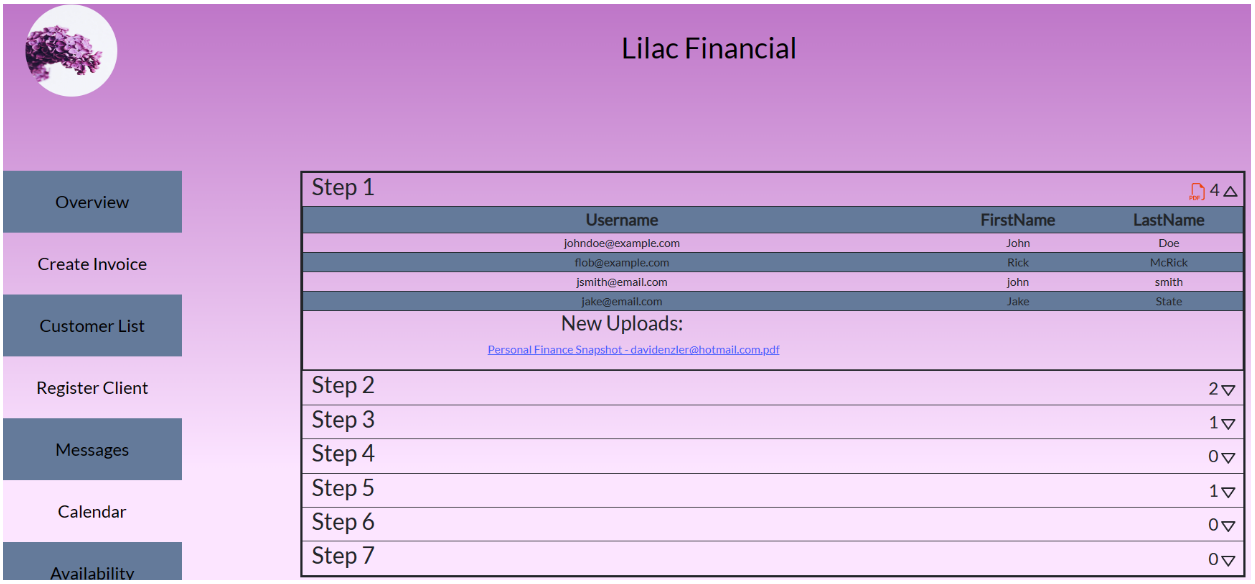


Figure: VNU-01

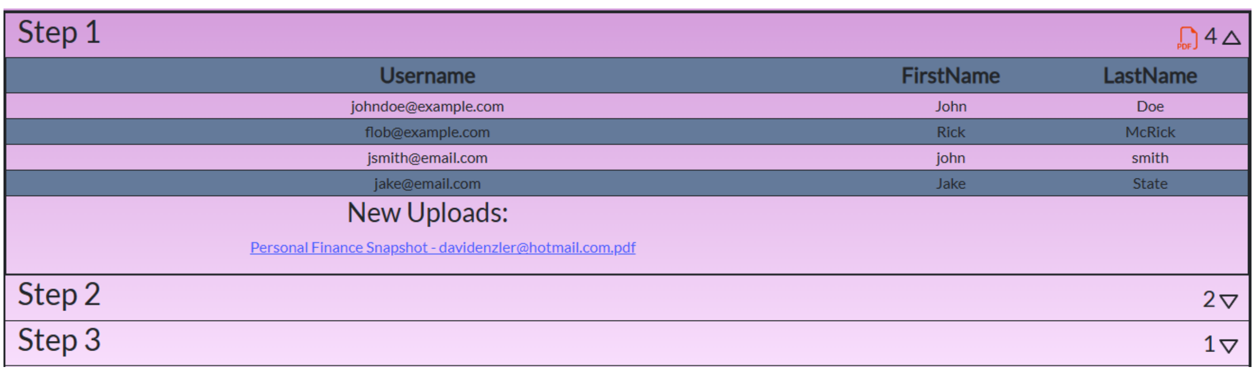


Figure: VNU-02

As the admin, you can view the newly uploaded PDFs customers submit by navigating to the Overview page in the admin portal (*Figure VNU-01*). The admin will know that customers have uploaded a PDF for a given step because of the PDF symbol at the right end of each step – as shown in the top right corner for Figure VNU-02, where step one contains a PDF icon but the other steps do not. Upon selecting a step, the admin can see a new section called “New Uploads” underneath the list of current clients at that step. By clicking the document, the admin can download the file that the customer submitted. Once downloaded, if the page is refreshed, the downloaded document will be removed from the “New Uploads” section. If there are no newly uploaded documents, the “New Uploads” section will be removed, as will the PDF icon.

Updating a Customer's Progress

First Name	Last Name	Address	Mobile Number	Email	Marital Status	Employment Status	Progress Step
John	Doe	123 Main St, Anytown, CA 90001	1234567890	johndoe@example.com			1 ↑ ↓
Rick	McRick	123 Main St, Anytown, CA 90001	1234567890	flob@example.com			1 ↑ ↓
Test	Test-1	No Address Provided		test@example.com			2 ↑ ↓
test2	test2Last	No Address Provided		test2@example.com			5 ↑ ↓
	test3Last	No Address Provided	93839070372	test3@example.com			3 ↑ ↓
john	smith	No Address Provided	93839070372	jsmith@email.com		Employed	1 ↑ ↓
Jake	State	No Address Provided	9168889208	jake@email.com		Employed	1 ↑ ↓
Admin		No Address Provided		admin@example.com			↑ ↓
David	Enzler	No Address Provided	1234567890	davidenzler@hotmail.com	Married	Employed	2 ↑ ↓

Figure: UCP-01

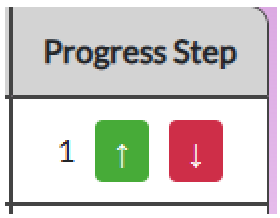
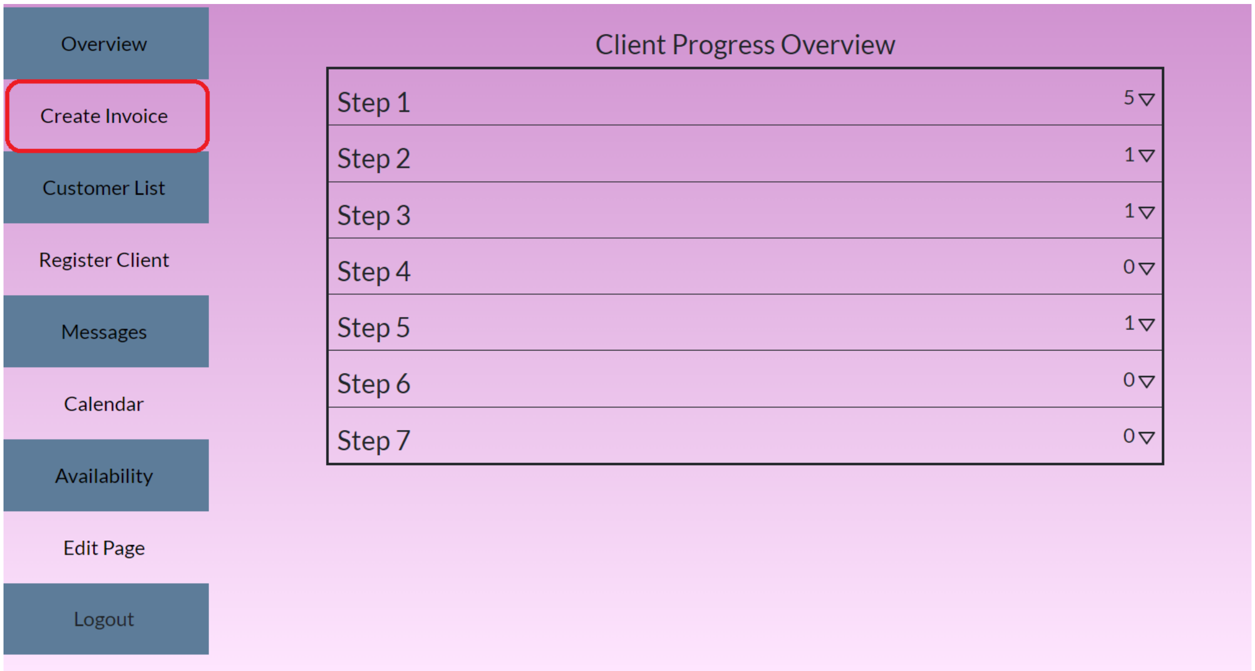


Figure: UCP-02

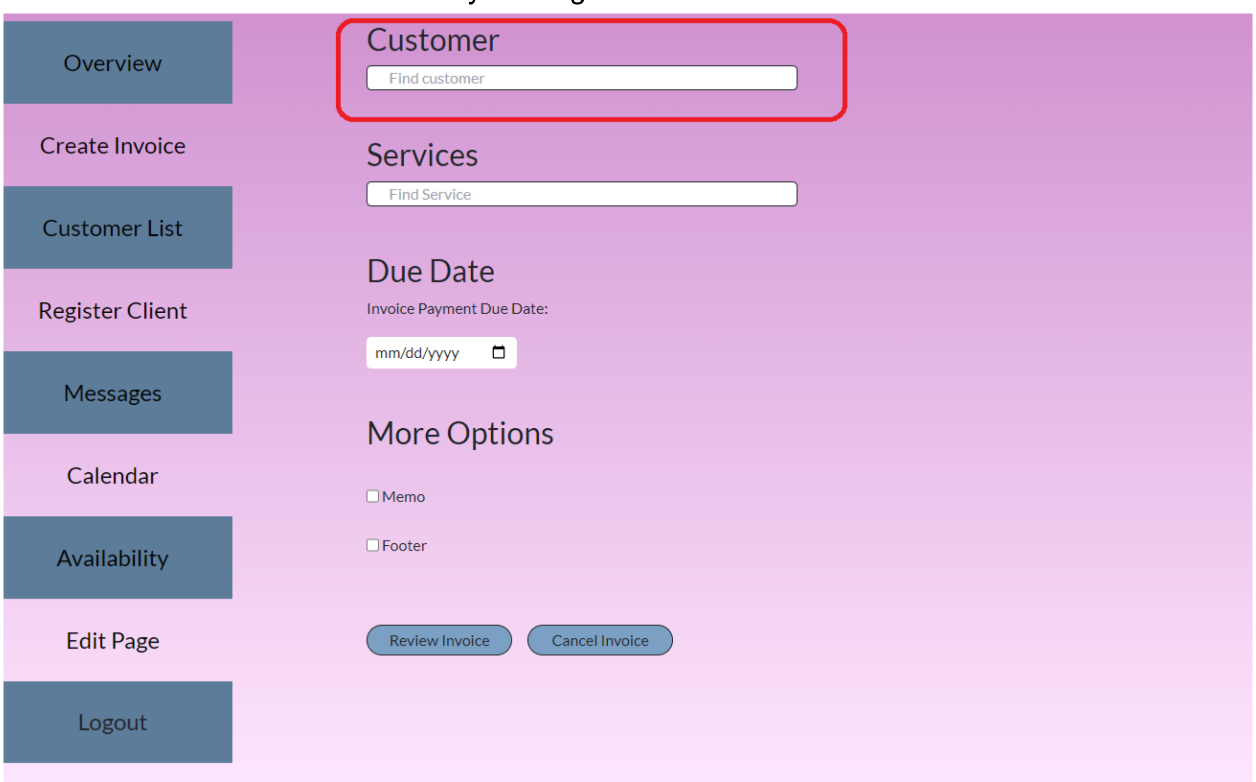
As the admin, you can update a customer's progress by navigating to the Client List page in the admin portal (*Figure UCP-01*). This page will contain a list of the clients, and on the right-hand side, under the "Progress Step" column, there is a cell with the progress step for that client as well as two buttons. Those buttons are shown in *Figure UCP-02,* where the admin can press the green button to increase the progress step for that customer. The admin can also press the red button to decrease the progress for that customer.

Creating an Invoice

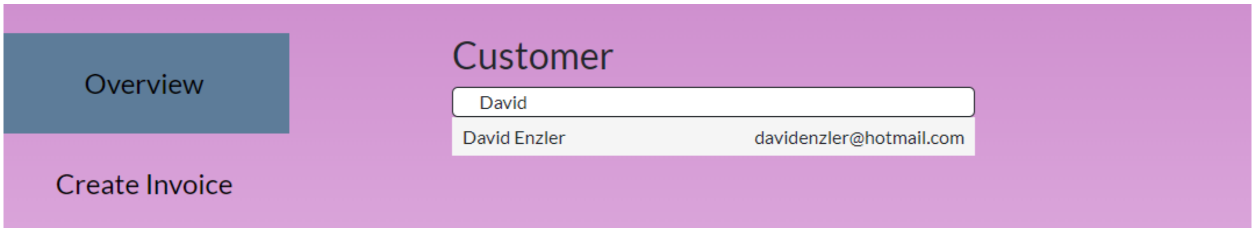
1. Click the `Create Invoice` link from the left side portal menu



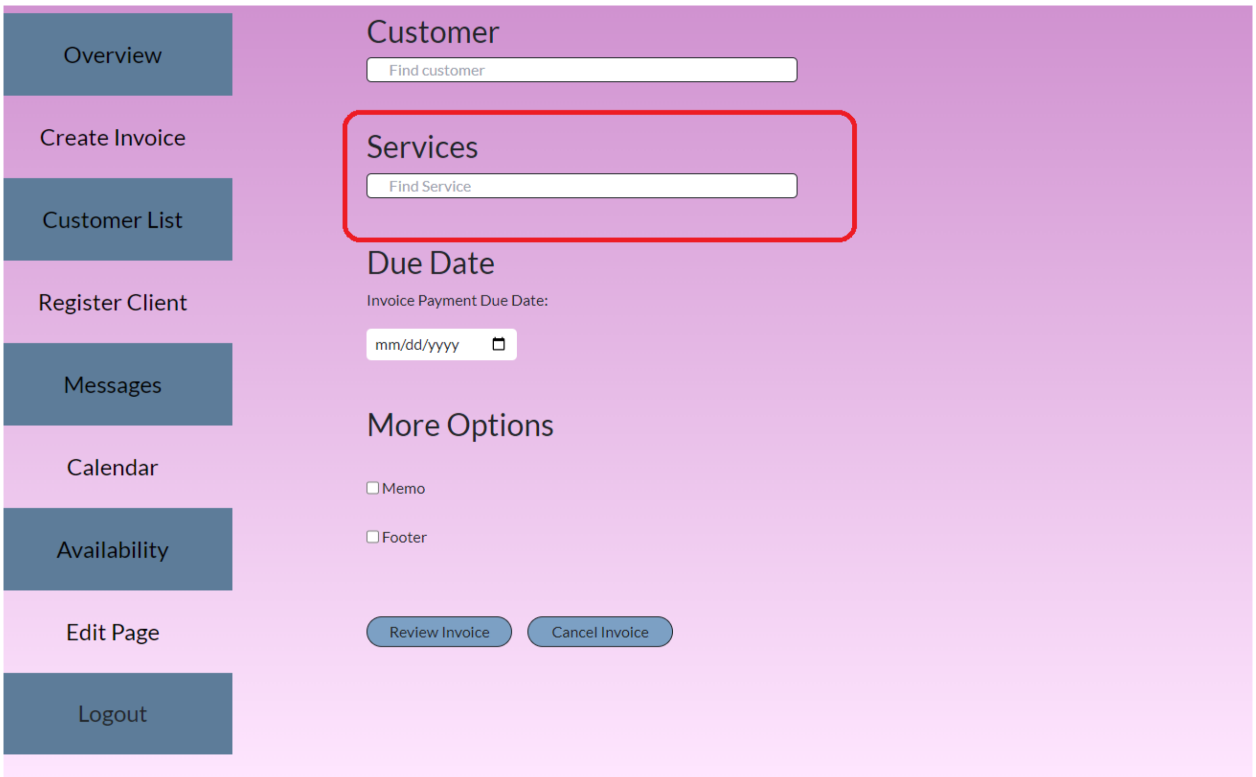
2. Search for customers to invoice by clicking the customer search field



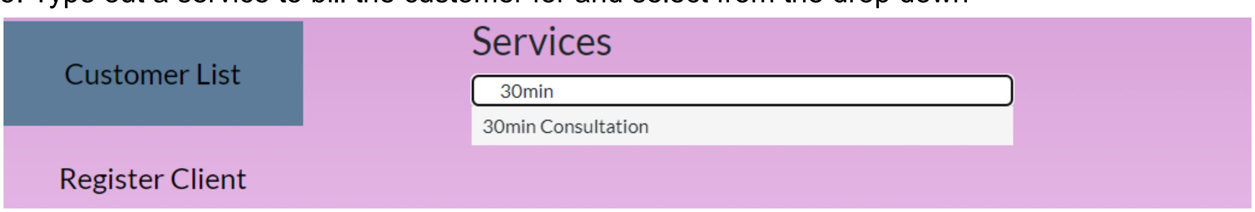
3. Type a customer's name and select a matching customer from the drop down



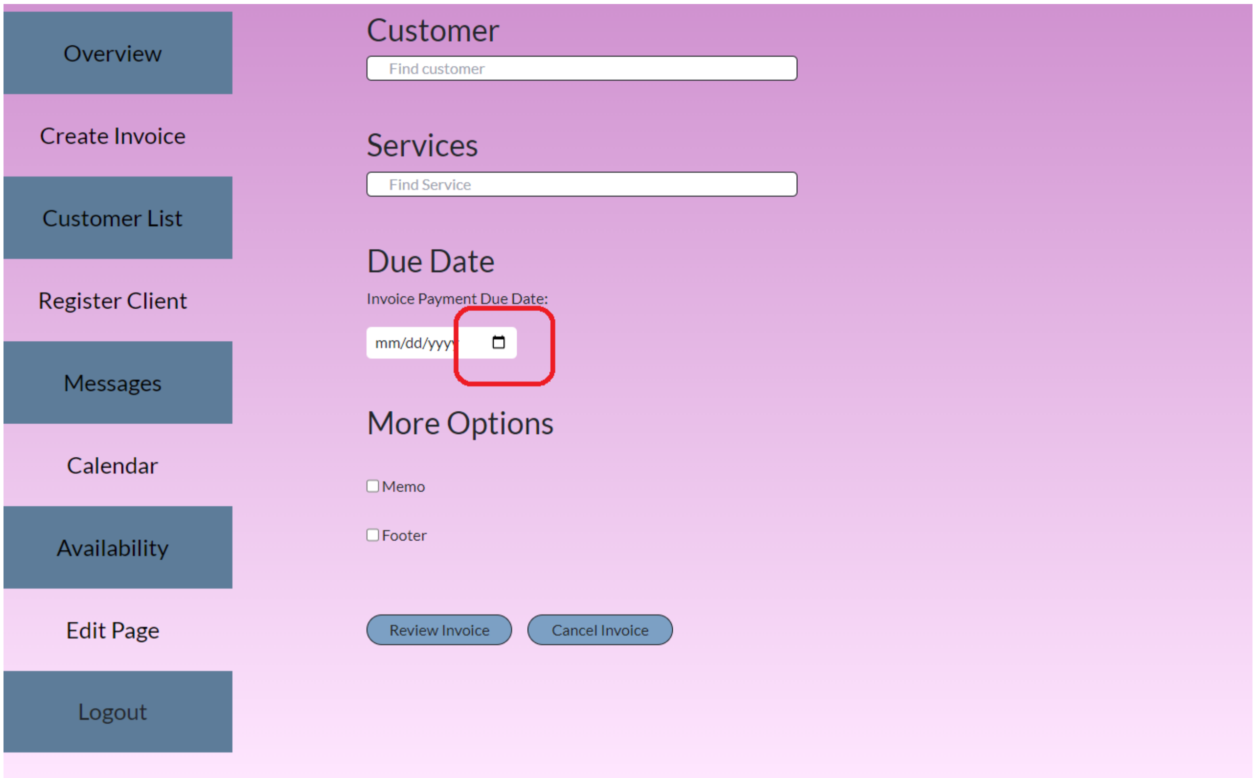
4. Search for services to bill the customer for by clicking the service search field

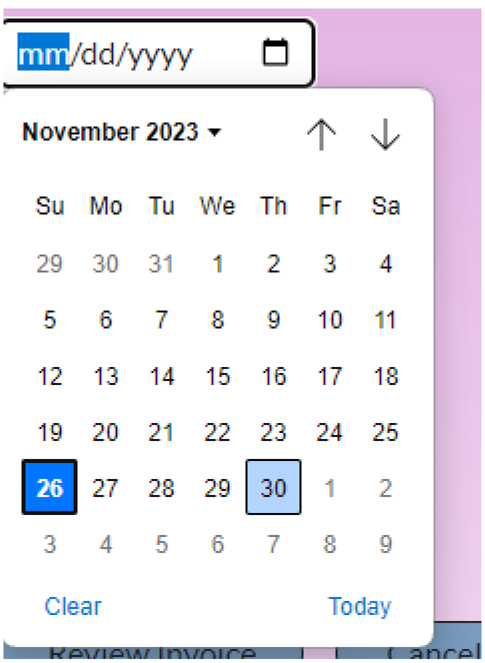


5. Type out a service to bill the customer for and select from the drop down

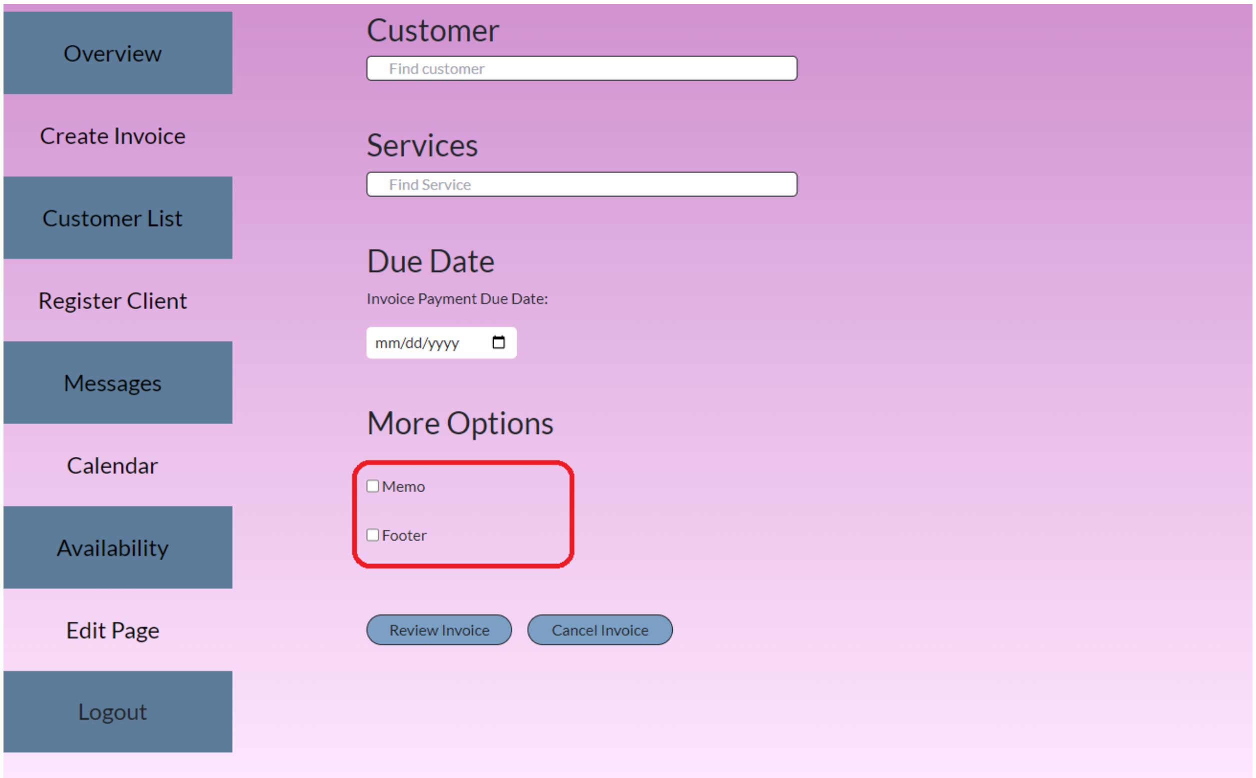


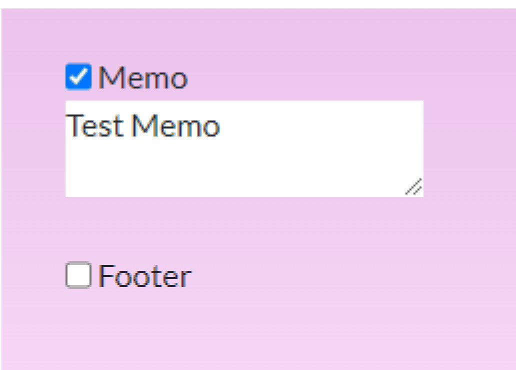
6. Set a due date for the invoice by selecting the calendar icon and setting a date



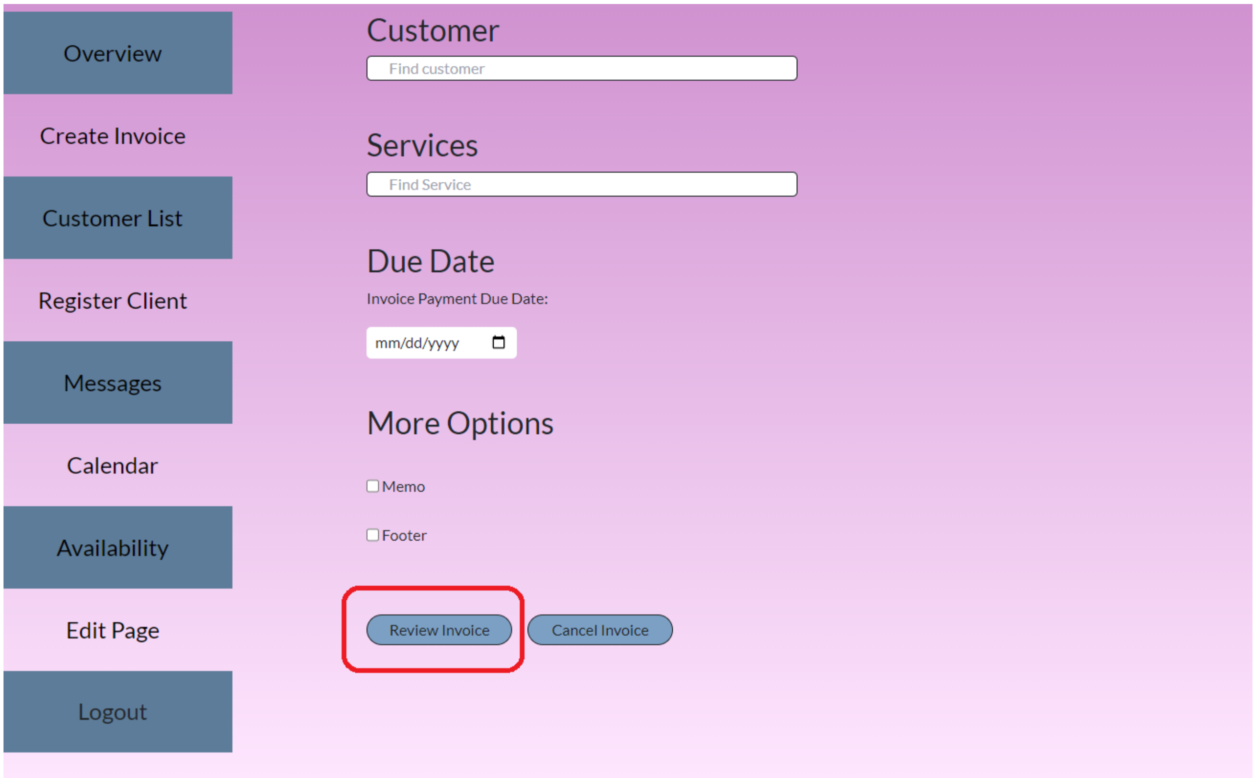


7. Optionally add a Memo or Footer to the invoice by checking the appropriate option and then filling out the text area

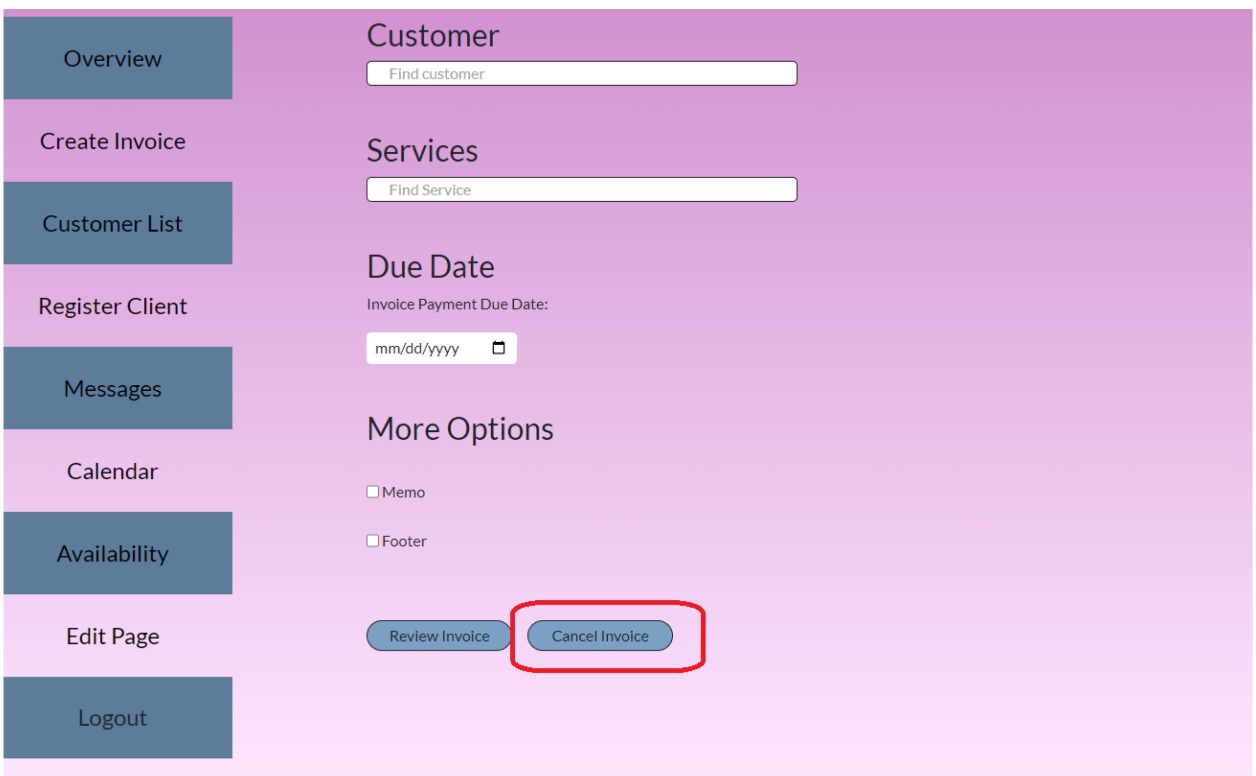




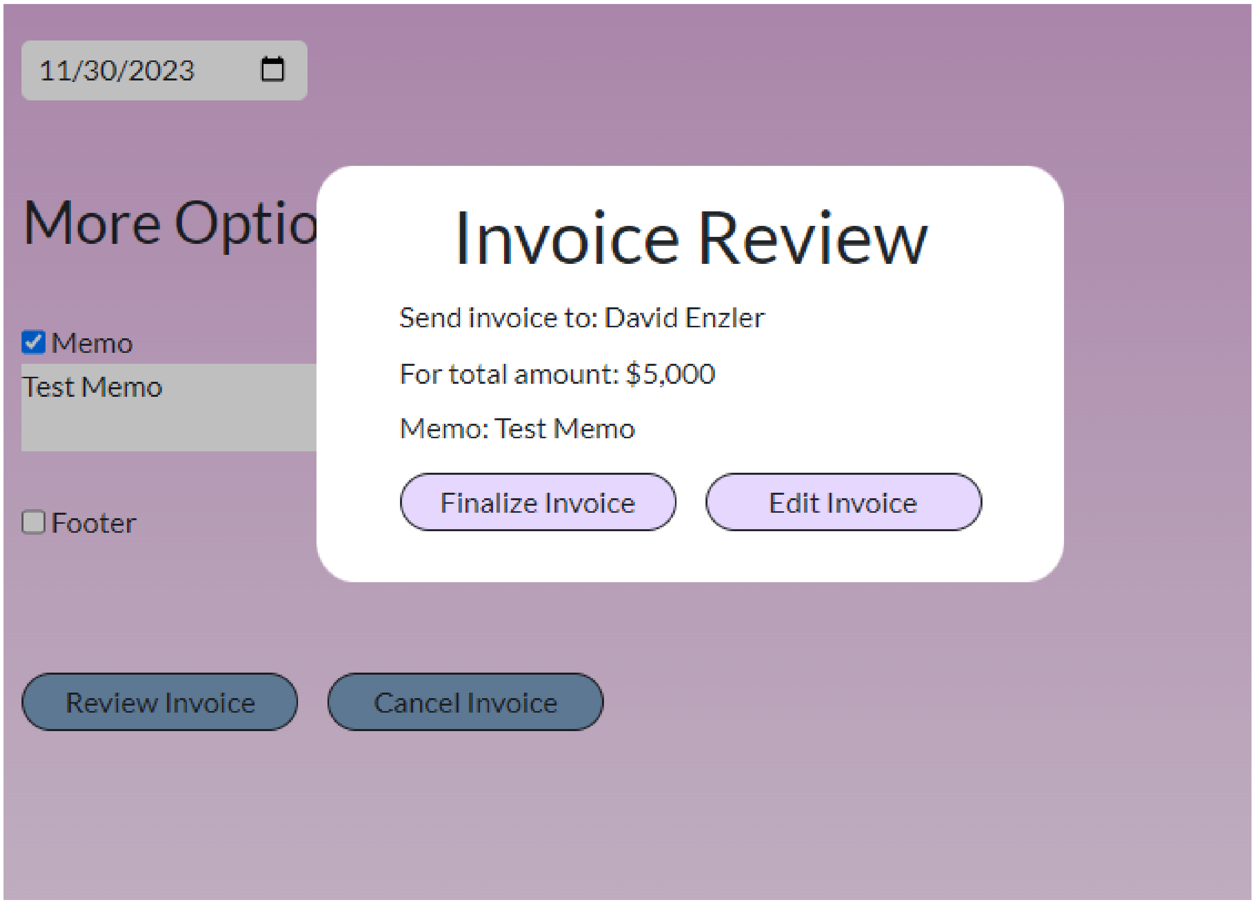
8. Review the Invoice before finalizing by selecting the review button



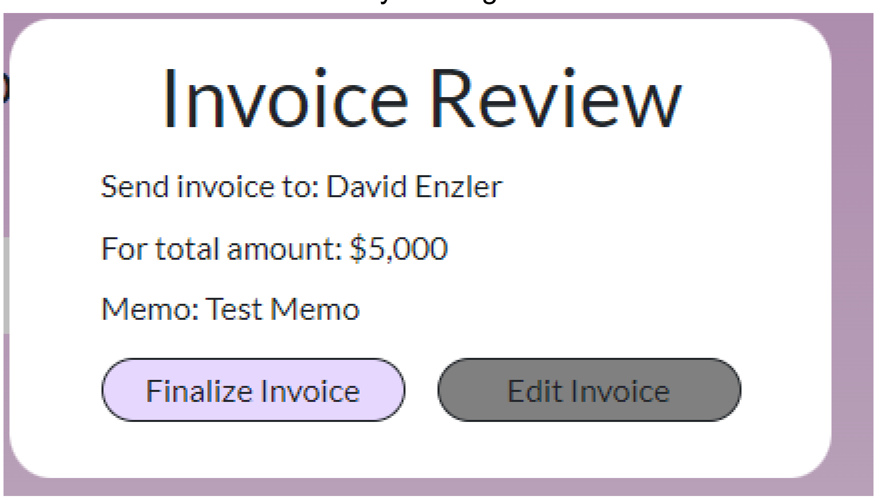
9. You can also cancel the invoice and clear the form with the cancel invoice button.



10. After Clicking `Review Invoice`, a popup appears with a summary of the



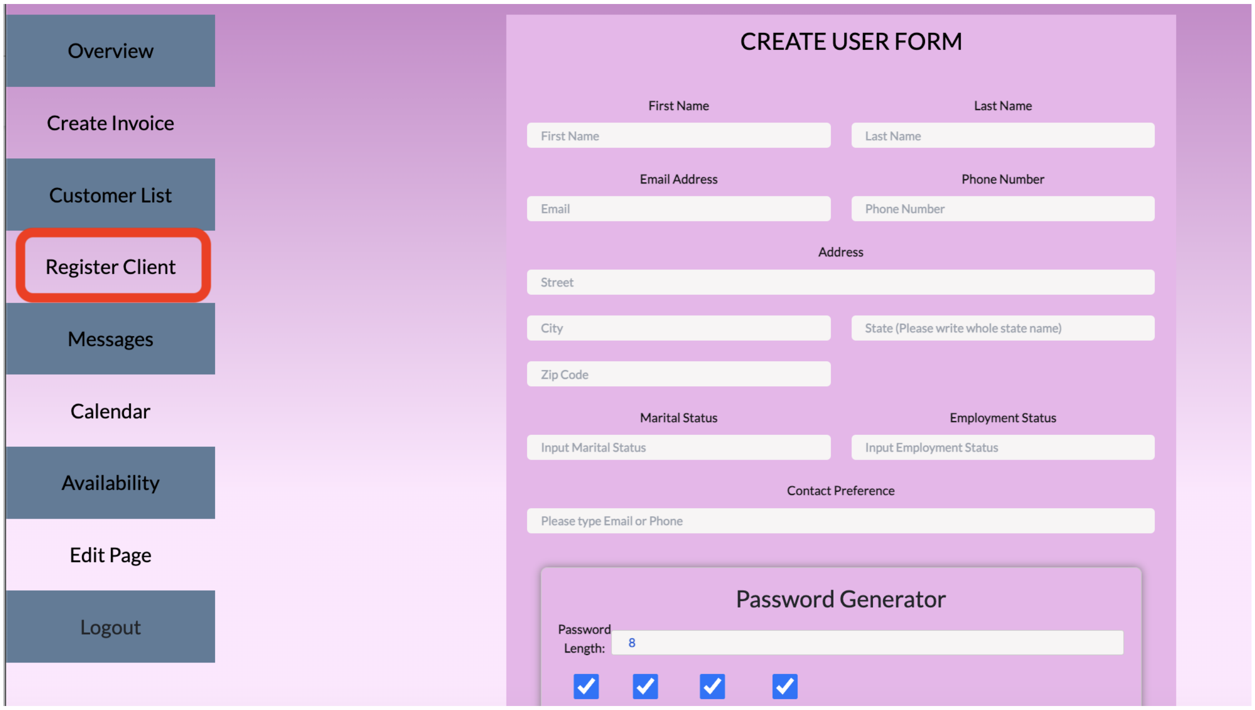
11. You can edit the invoice by clicking `Edit Invoice`



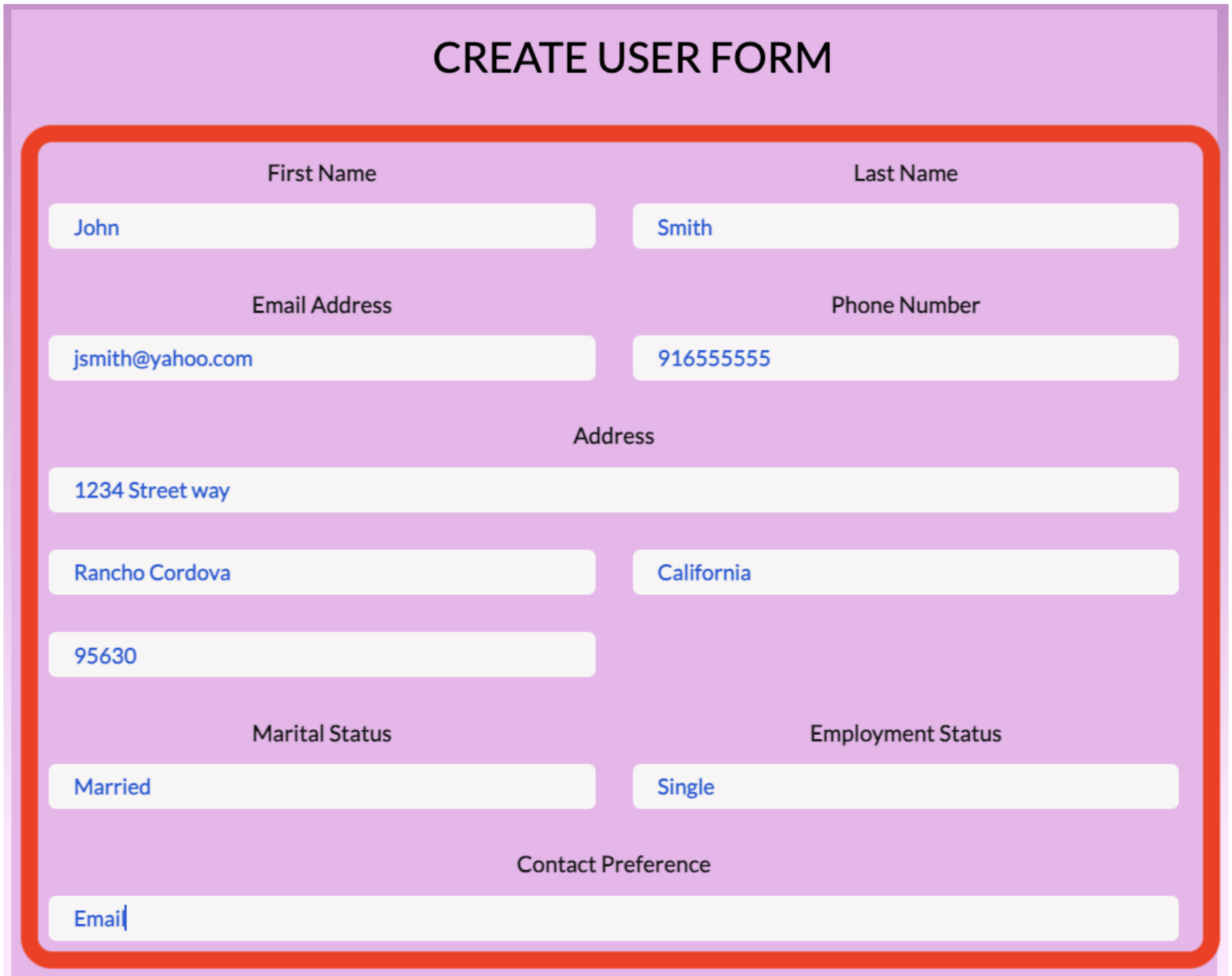
12. If the invoice is correct, you can click `Finalize` to complete the invoice. WARNING: once an invoice is finalized it cannot be modified further. After clicking finalize, the customer is emailed a link to pay the invoice and their portal will be updated.

Register a new customer

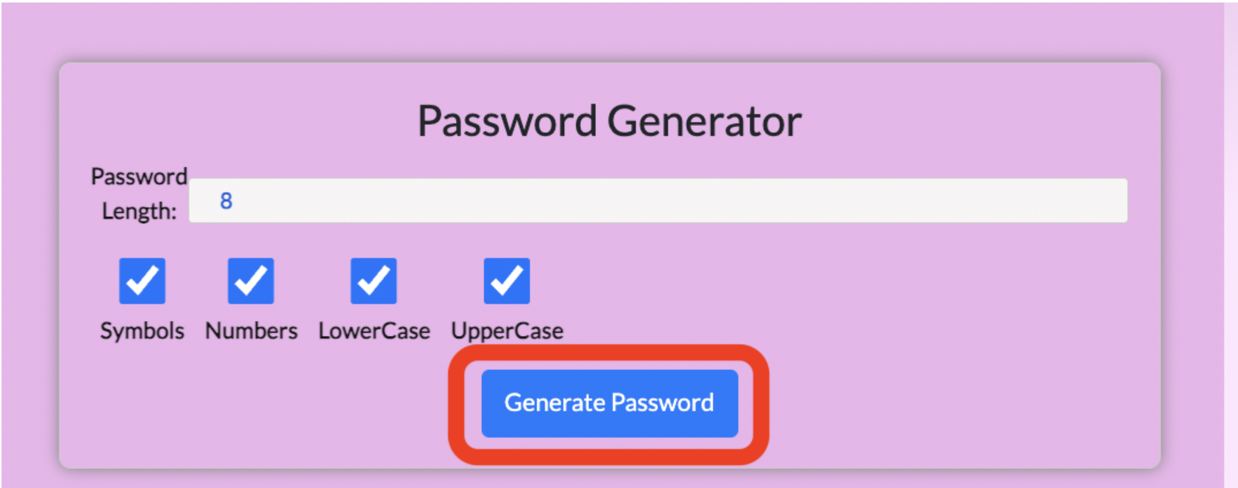
1. Click the `Register Client` link from the left side portal menu



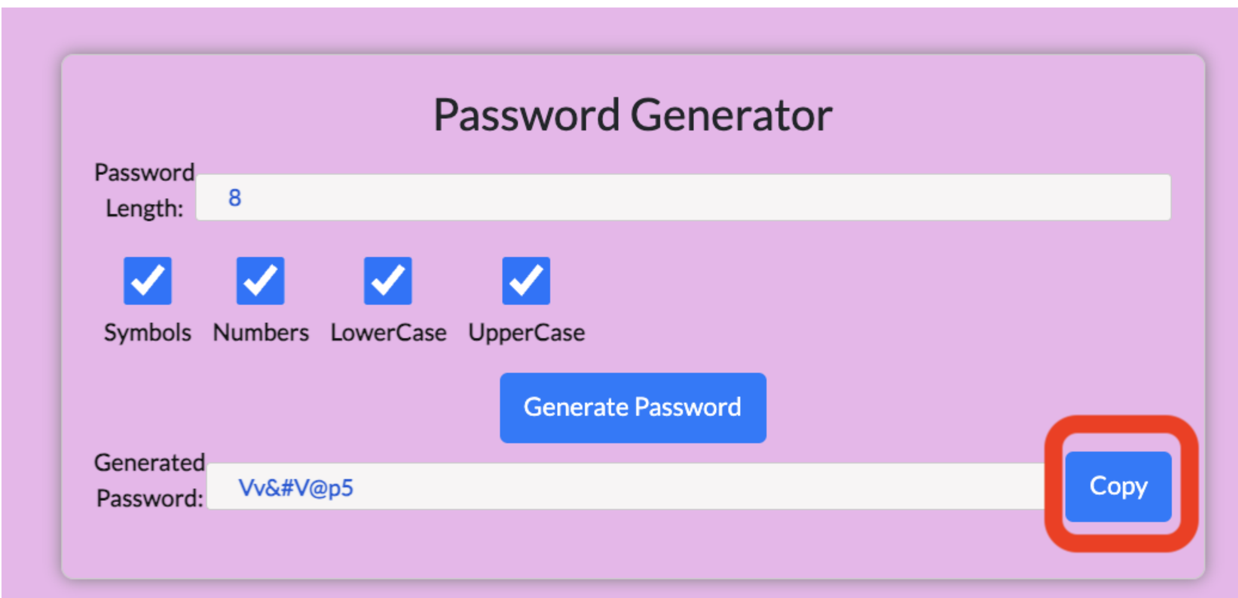
2. Start to fill in **ALL** the fields in the “Create User Form” and make sure to follow placeholder instructions. Ex. First Name: John = correct , First Name: John Smith = incorrect. Some fields like “Phone Number” only take numeric values.



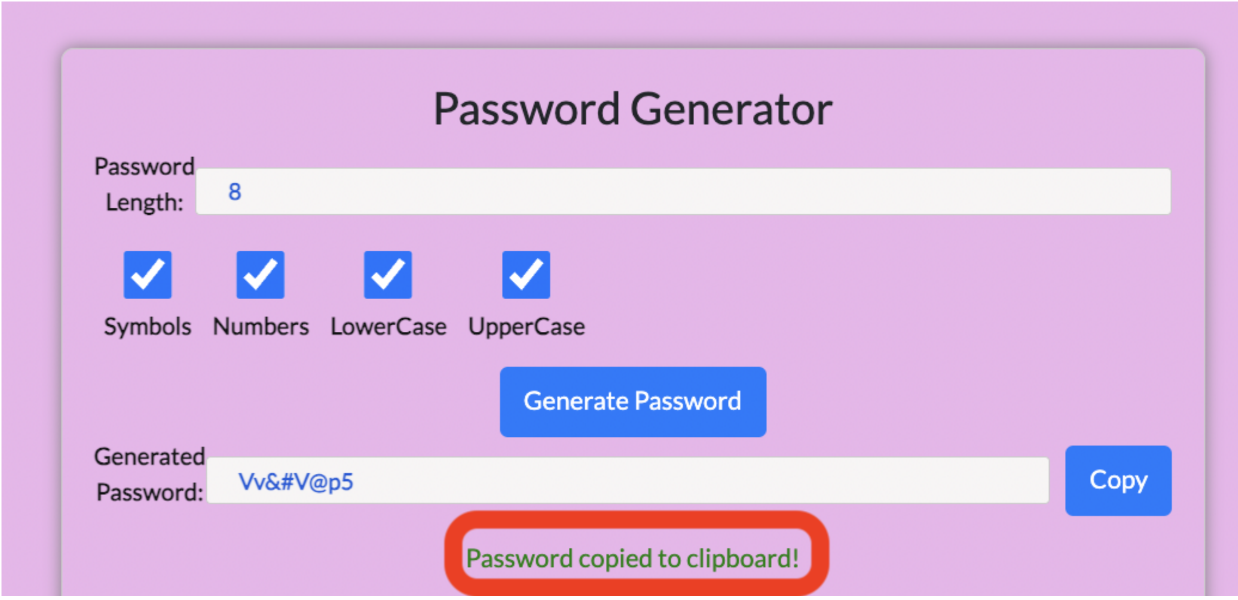
3. Generate a password according to the parameters picked within the “password generator”. Inside the “Password Length” box you can choose a numeric value to pick the length of the password. Check boxes for the parameters that you want and uncheck boxes for unwanted parameters. Click on the “Generate password” button to generate password.



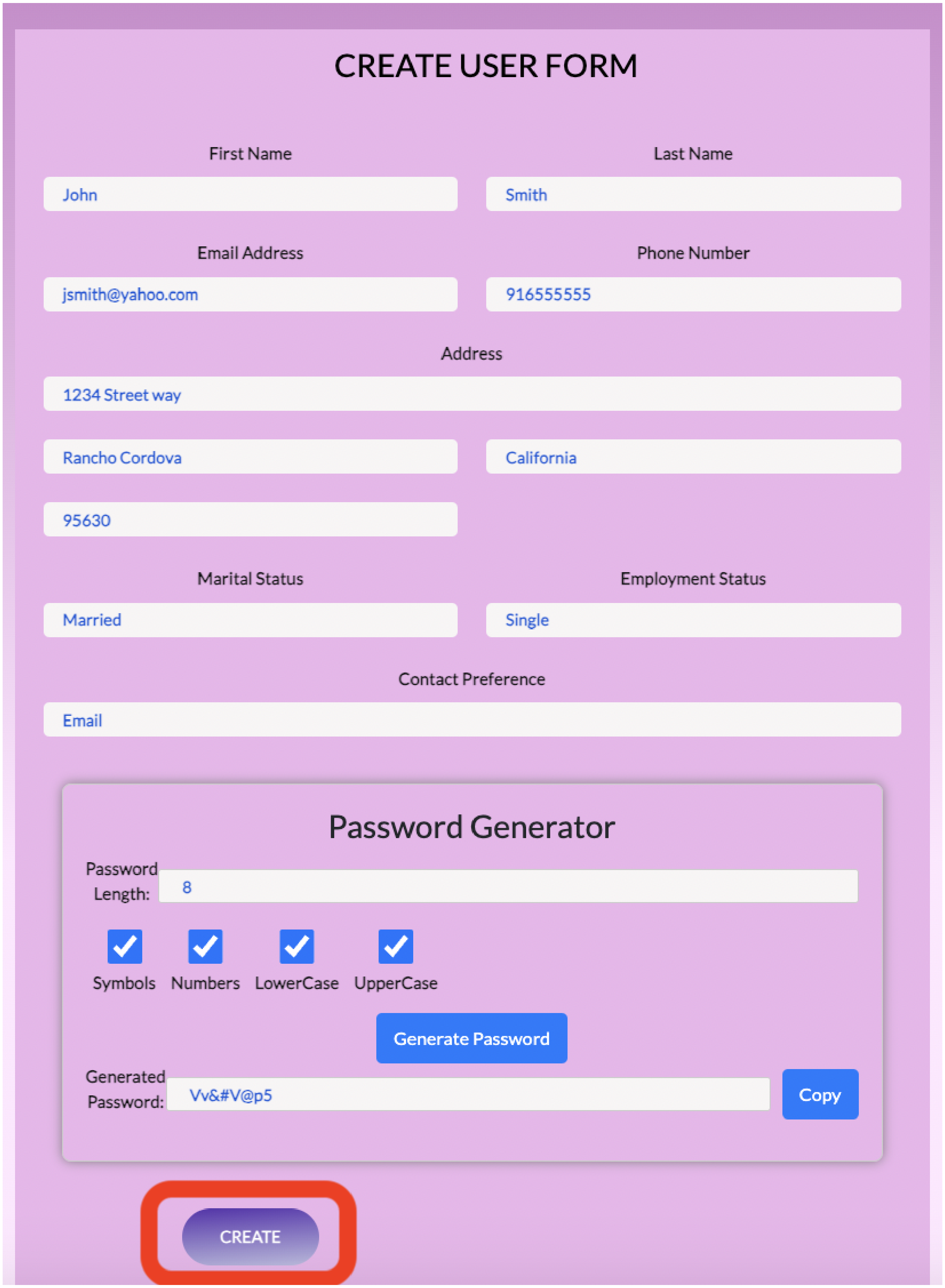
4. Once the password is generated, the option to copy the generated password will become available.



If the password is copied, the admin will receive a message notifying them on the action.



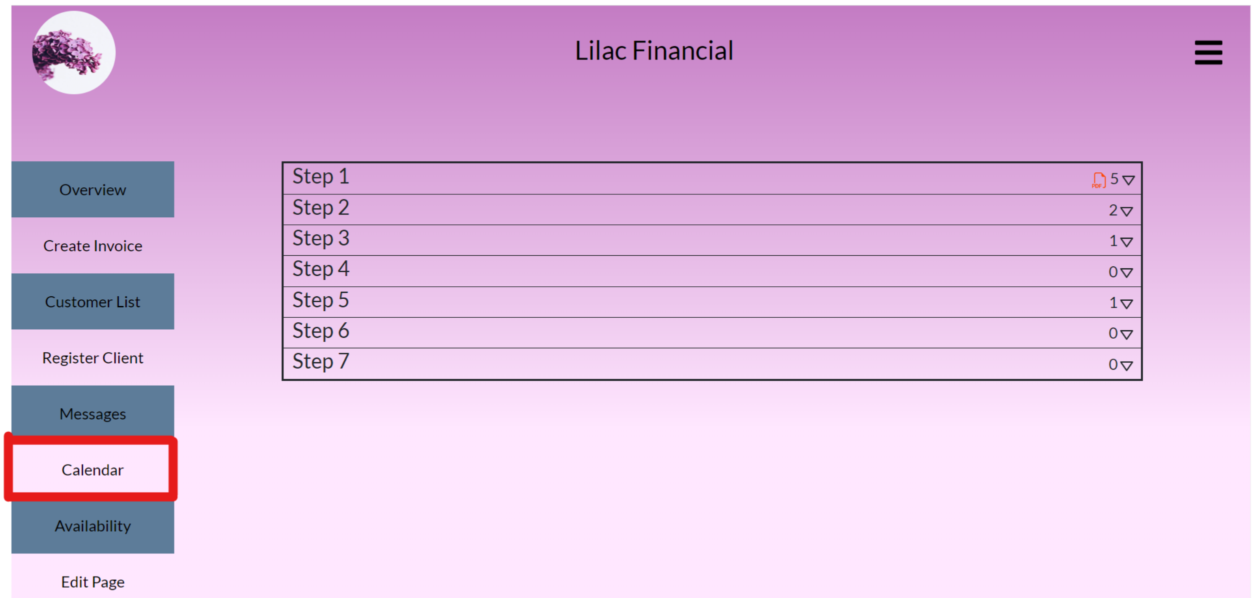
5. Once all the fields have been filled, the admin can then create the user by clicking on the “create user” button.


CREATE USER FORM
First Name
John
Last Name
Smith
Email Address
jsmith@yahoo.com
Phone Number
916555555
Address
1234 Street way
Rancho Cordova
California
95630
Marital Status
Married
Employment Status
Single
Contact Preference
Email
Password Generator
Password Length:
8
Symbols
Numbers
LowerCase
UpperCase
Generate Password
Generated Password:
Vv&#V@p5
Copy
CREATE

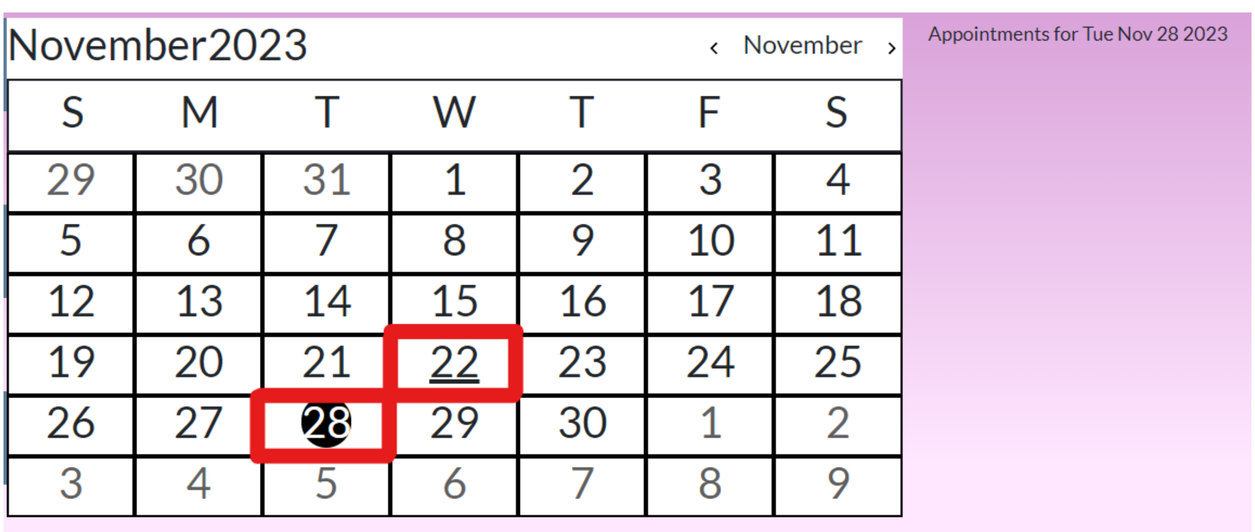
Viewing and Canceling Appointments

The Admin calendar view lists all appointments and gives the option to cancel them.

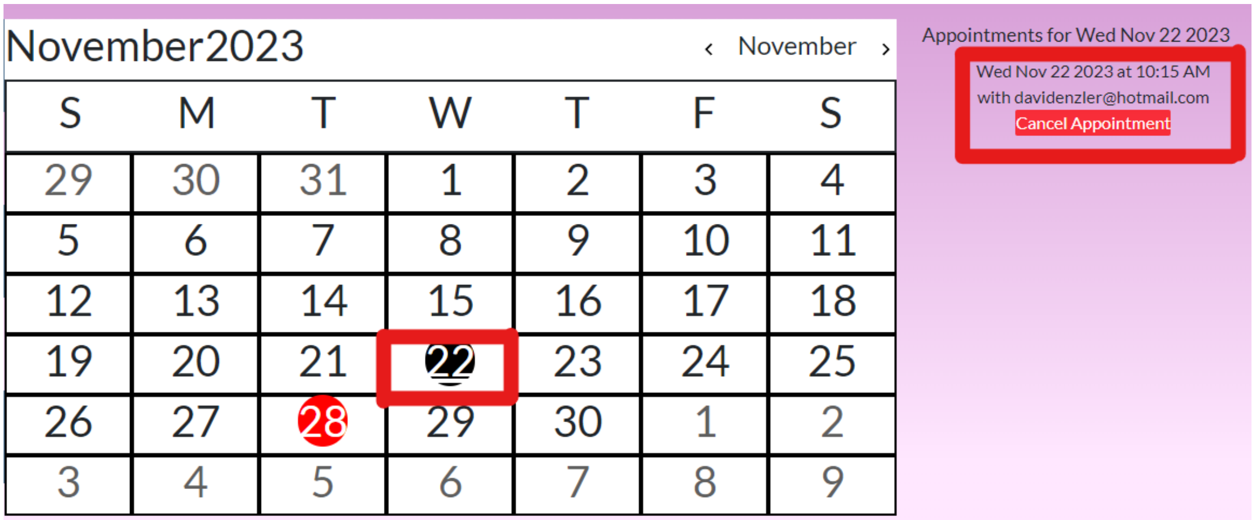
To navigate to the Appointments Calendar, select the “Calendar” component in the admin portal.



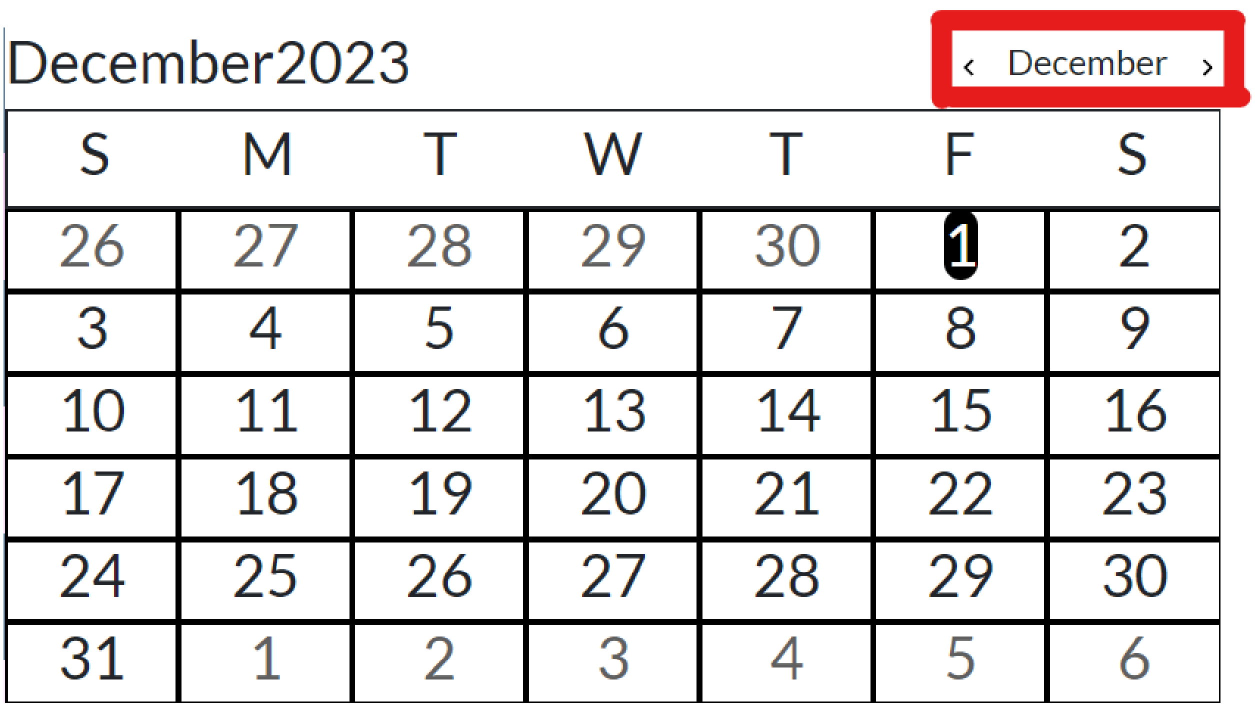
Selecting “Calendar” will load the Appointment Calendar. By default, the current date will be selected and highlighted in black. Any dates that already have appointments scheduled on them will be underlined.



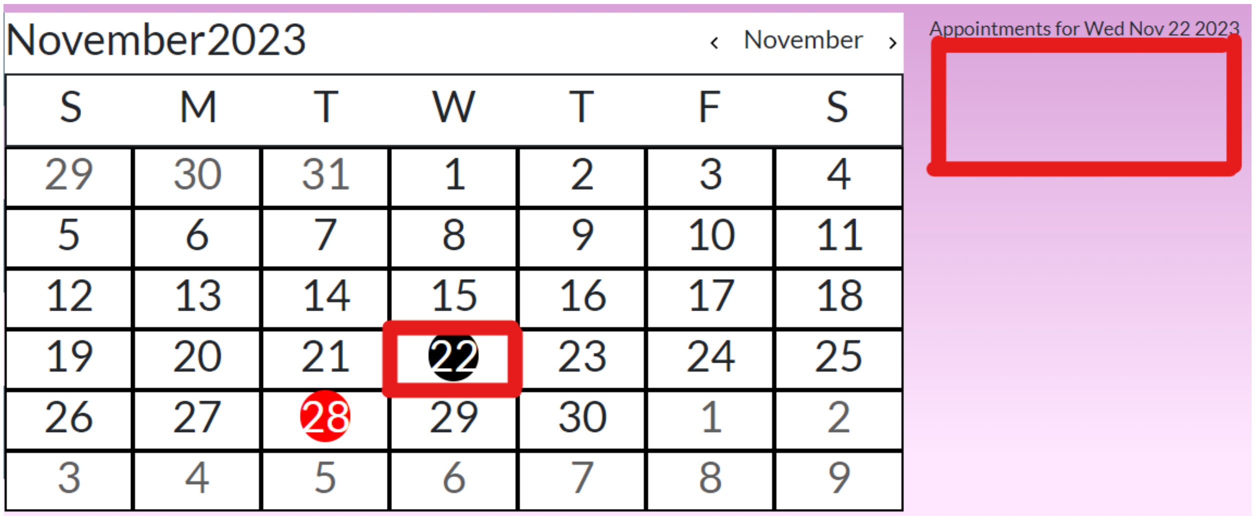
Click on a date in the calendar to select it. Selecting a date will highlight the date in black on the calendar. It will also display any appointments for that date. If there are no appointments, the section for listing appointments will be blank.



To change the month on the calendar, click on the arrows in the top right of the calendar.



To cancel an appointment, click the “Cancel Appointment” button. This will delete the appointment from the database, remove the underline, remove the appointment from the appointment list next to the calendar, send notifications to the user and admin's inboxes, and release the time taken by the appointment to other potential appointments.

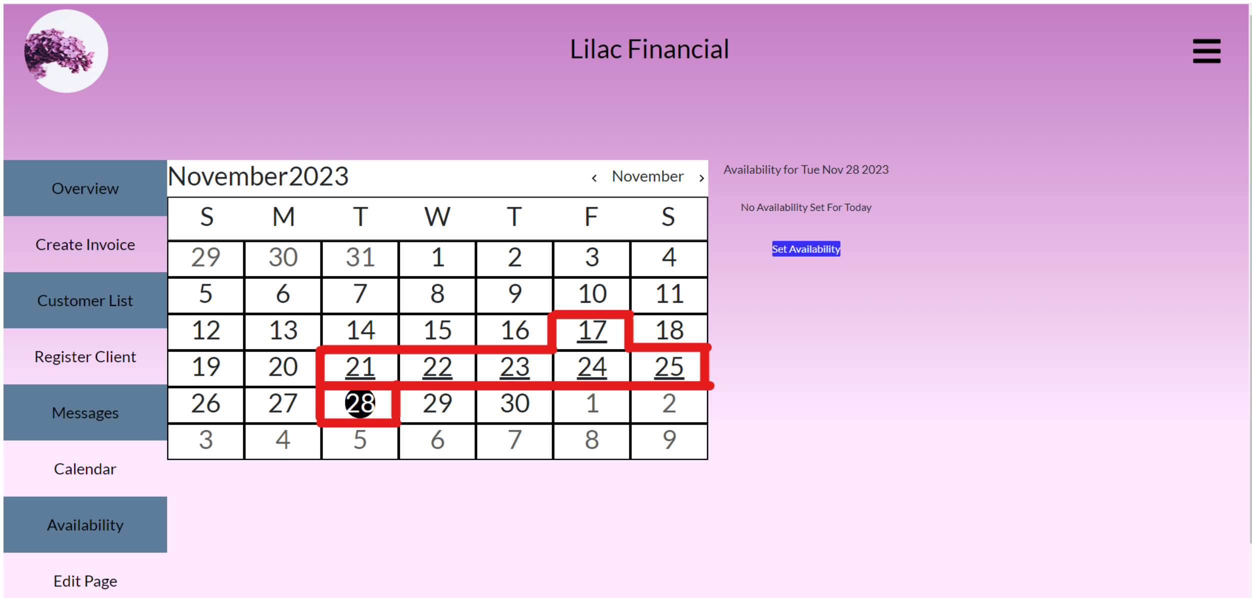


Set Appointment Availability

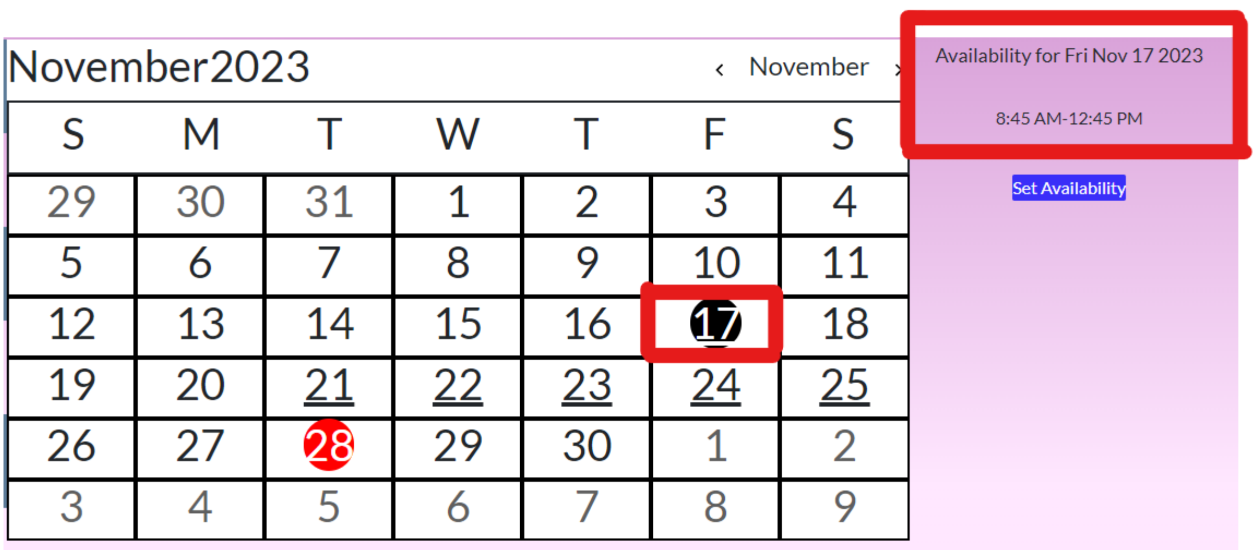
The Availability Calendar allows admins to select two times that set the boundaries of times customers can schedule appointments for a given day.

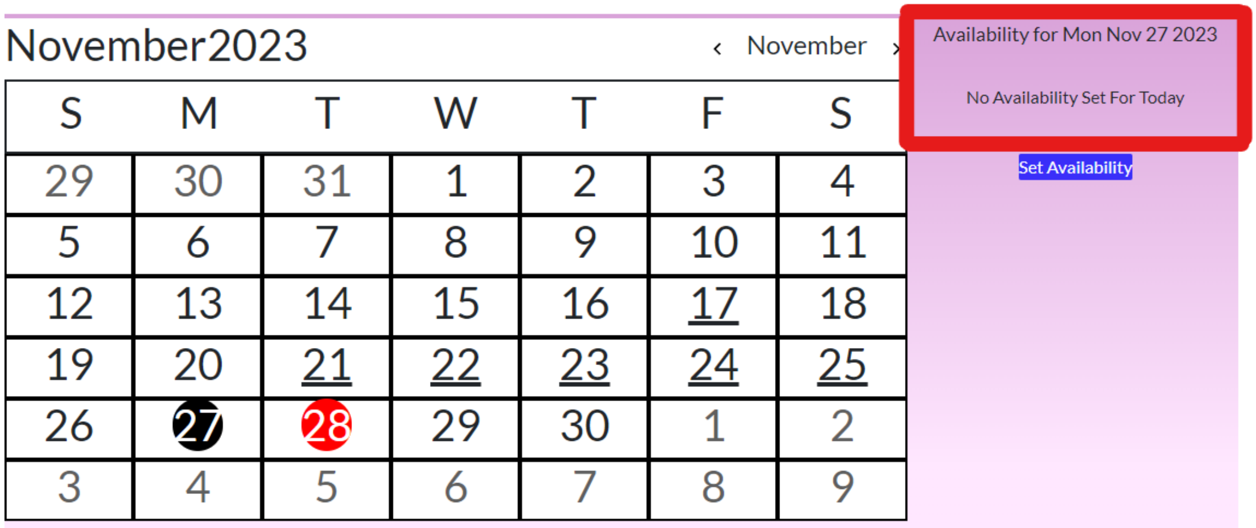
To navigate to the Availability Calendar, select the "Availability" component in the admin portal.

Selecting the “Availability” Component loads the Availability Calendar. By default, the current date will be selected and highlighted in black. Any dates that already have availability set will be underlined.

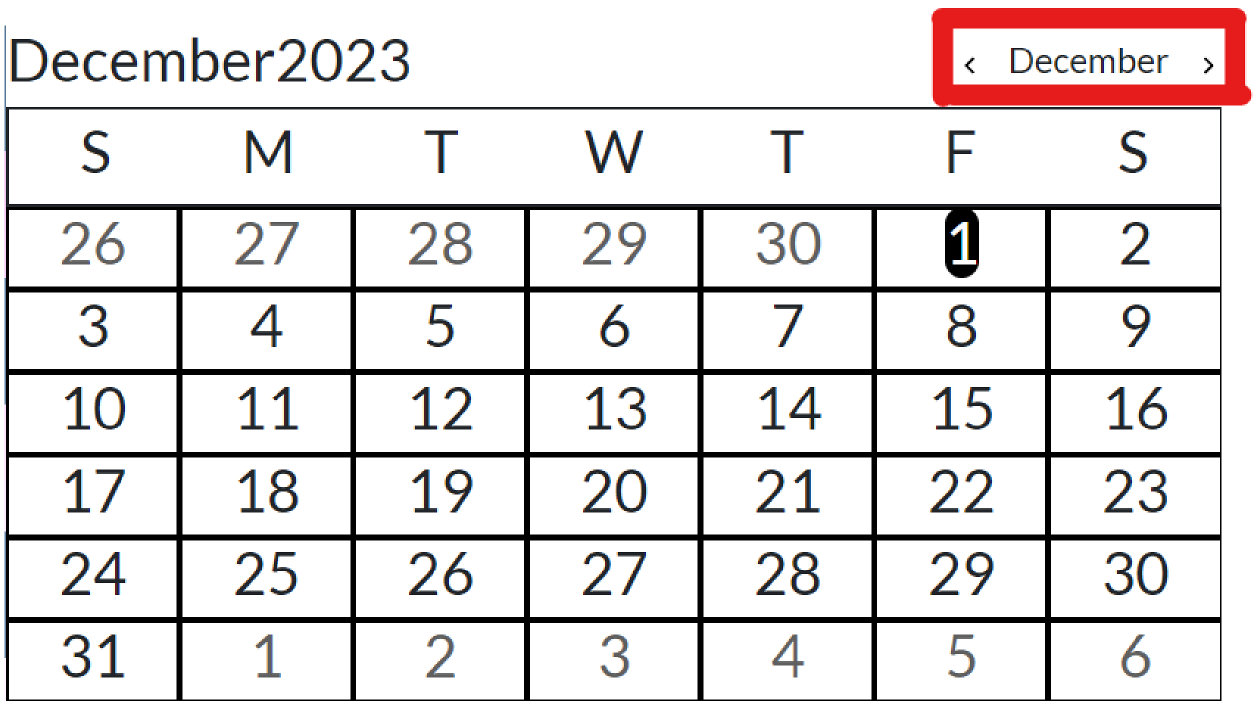


Click on a date in the calendar to select it. Selecting a date will highlight the date in black on the calendar. It will also display the set availability for that date. If there is no set availability, the page will display “no availability set for today”.

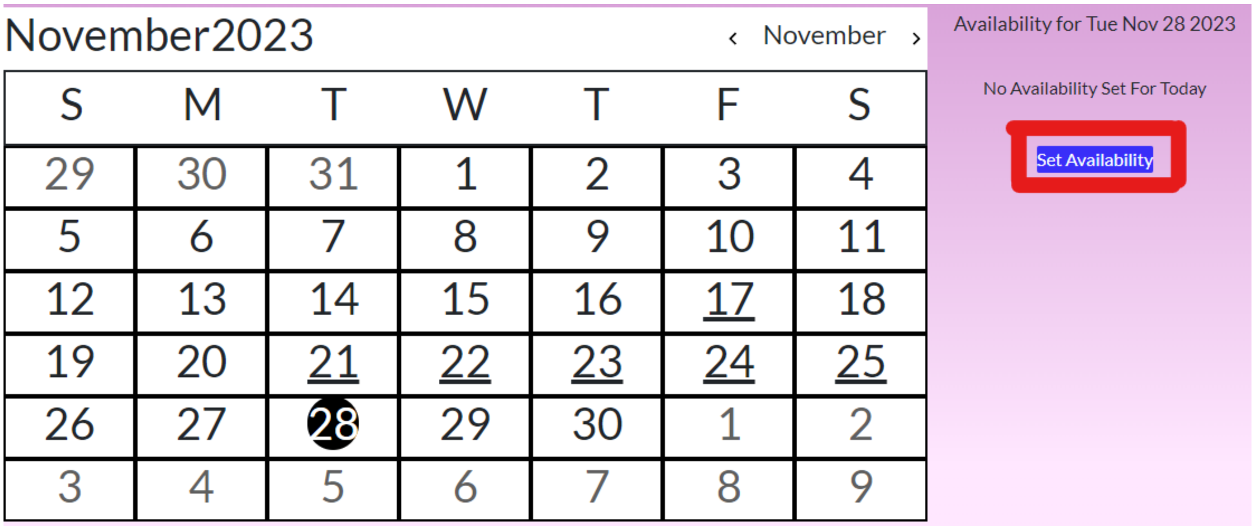




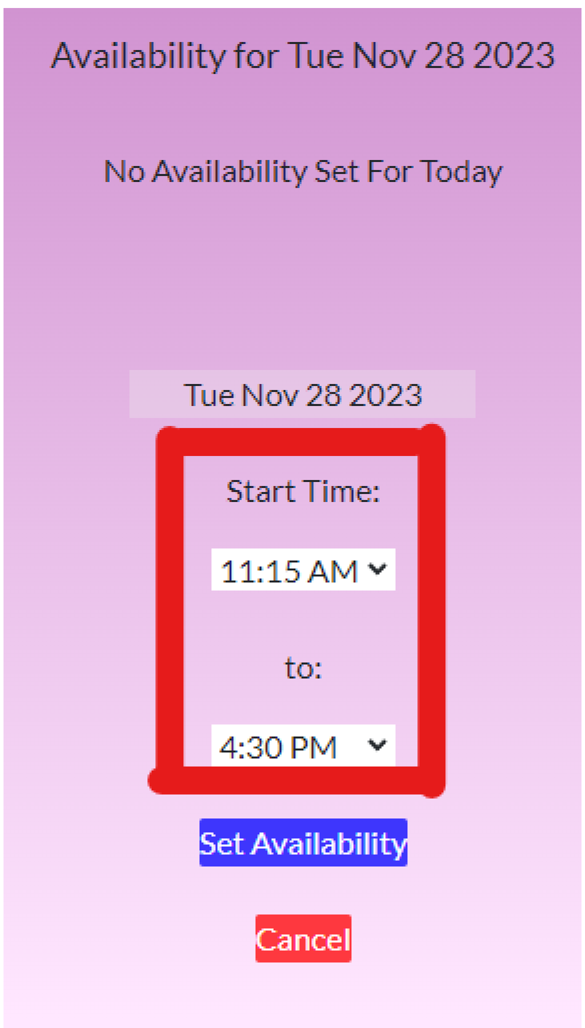
To change the month on the calendar, click on the arrows in the top right of the calendar.



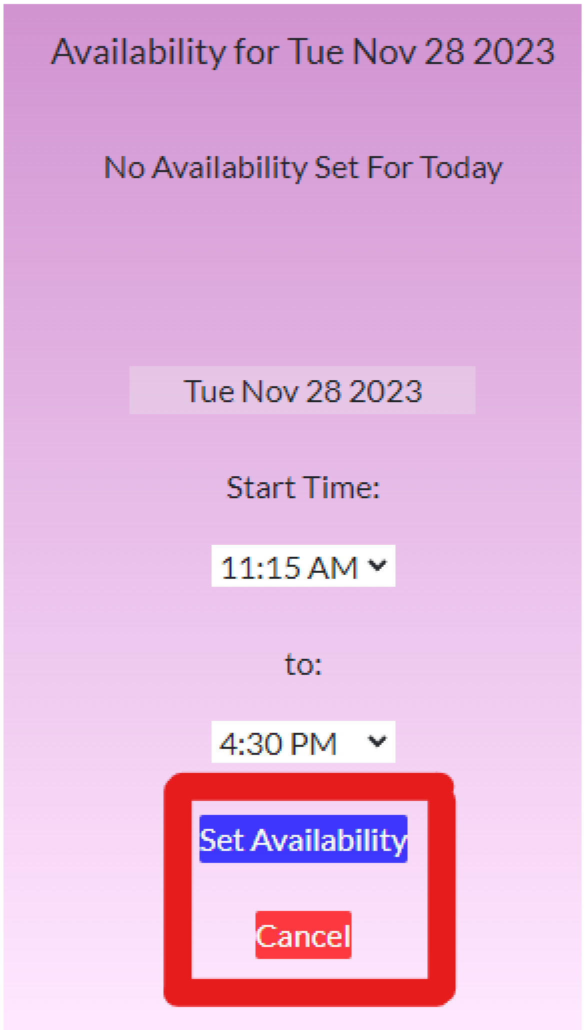
To set the availability for a date, select the date then click the Set Availability Button to the right of the calendar. This will open the form for selecting the availability window.

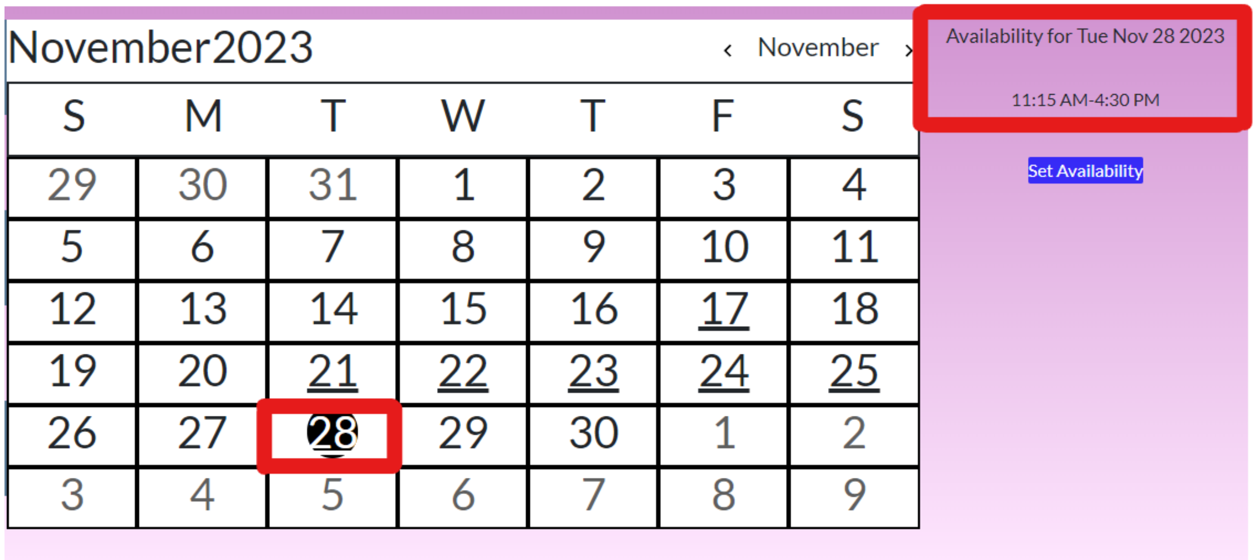


Select the start and end time for the availability from the two dropdown menus.



To confirm your selection, Click on the “Set Availability” button again. Doing so will save the time window to the database, underline the date on the calendar, and update the availability display. To cancel the selection, click the “Cancel” button.



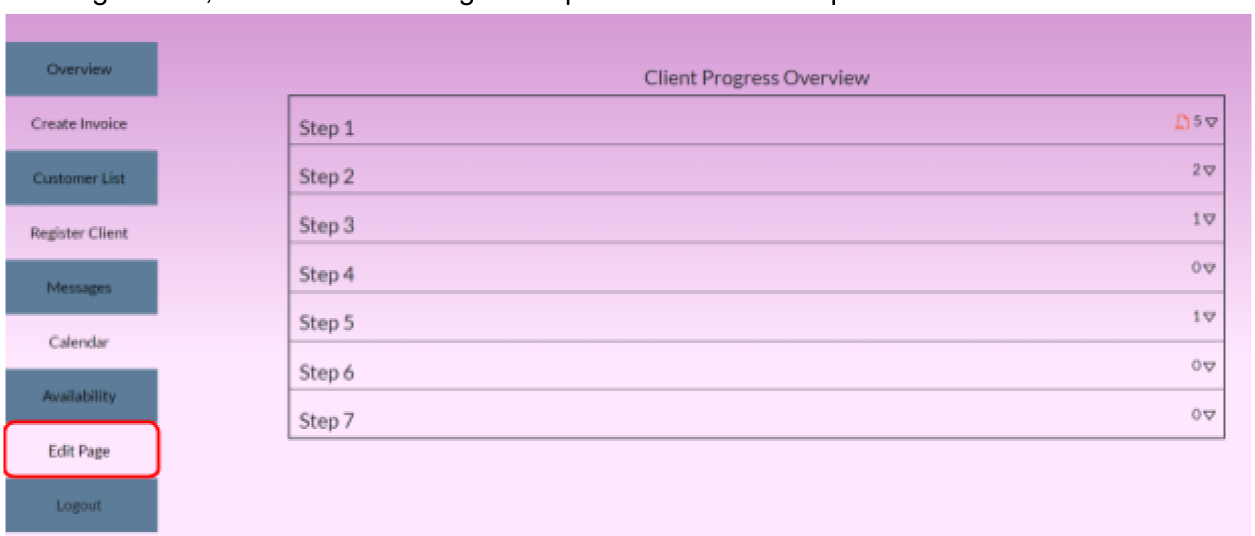


Note: Setting the availability of a date with the availability already set overwrites the previously set availability.

Edit Page

The edit page is a function that allows the administrator to edit one of the 3 public pages (homepage, about, and contact).

To navigate to it, select the "Edit Page" component in the admin portal:



Upon entering the edit page, this is the screen that will be first presented:

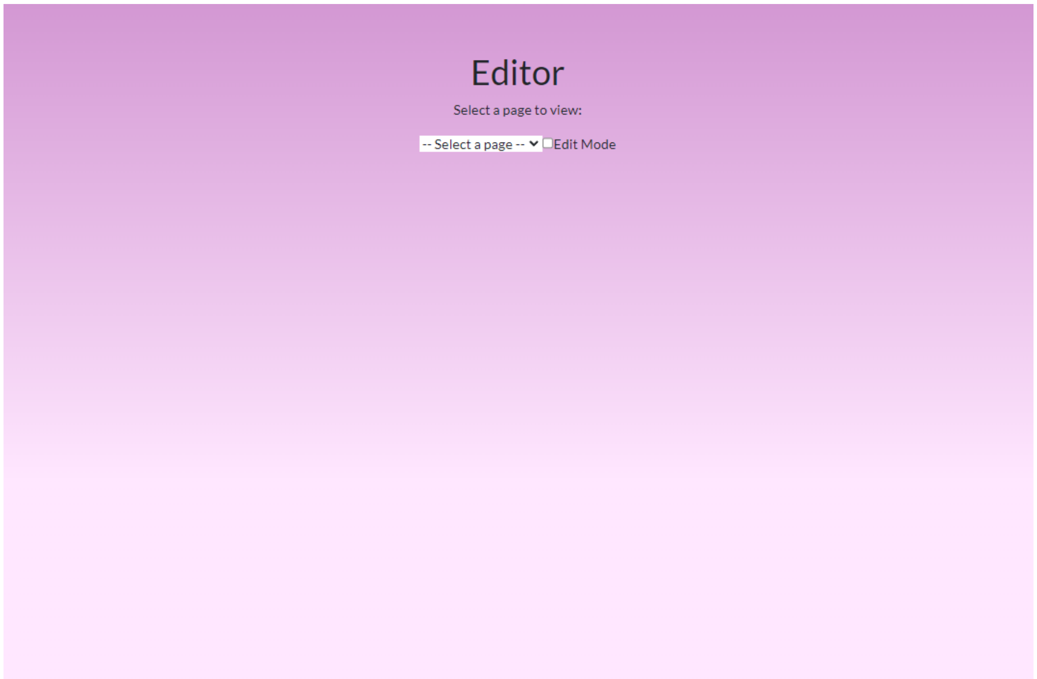
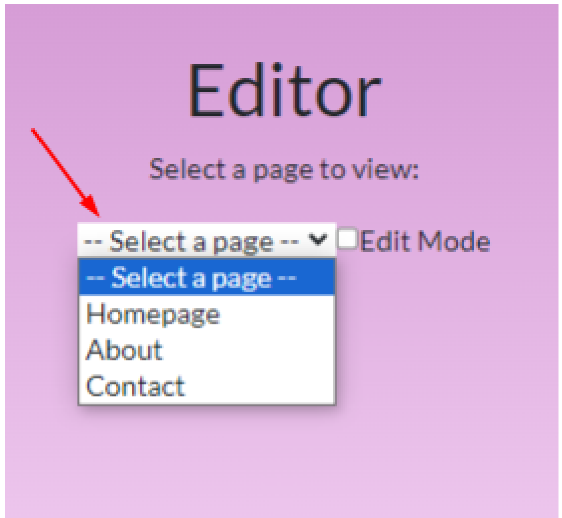


Figure E1: Landing Page for Editor

Viewer and Editor

There are two primary functions in the editor:

- **Viewer**
  - There are 3 views, one for each of the public-facing pages:
    - Contact view, homepage view, about page view
  - Each view is a display of what the corresponding page looks like.
  - To select a view, click the drop down menu. You will be presented with three options - choose which view that you want to see.



- **Example:** Homepage view

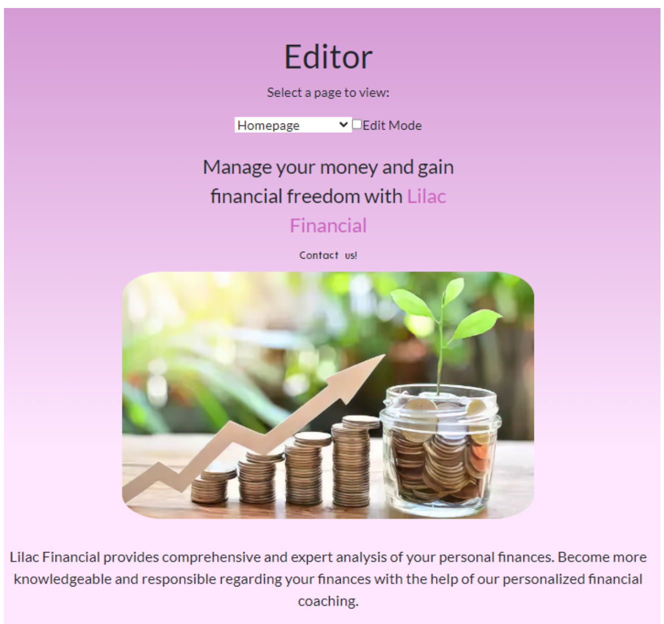
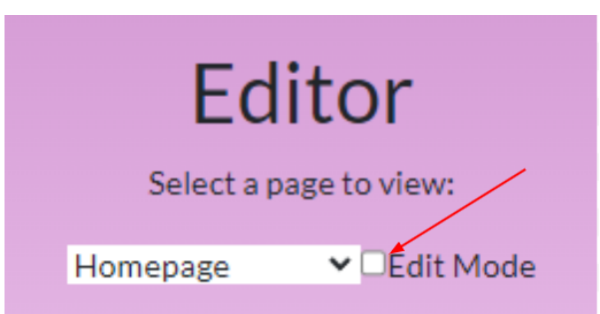
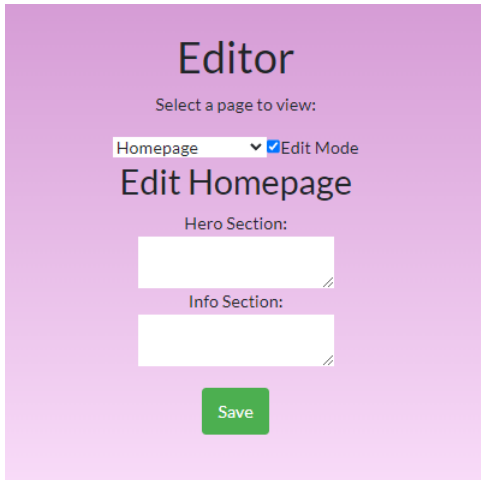


Figure E2: Homepage View

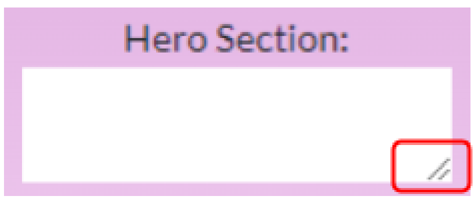
- **Editor**
    - Similar to the views, there are 3 editor pages - one for each of the public-facing pages:
        - Contact editor, homepage editor, and about editor
    - Each editor allows the admin to change certain text in the respective pages.
    - To get an editor, check the “Edit Mode” checkbox:

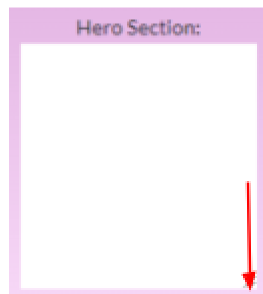


- **Example:** Homepage editor



- To make the text box large, hover the cursor over the bottom right where the two black lines are, and drag downwards.

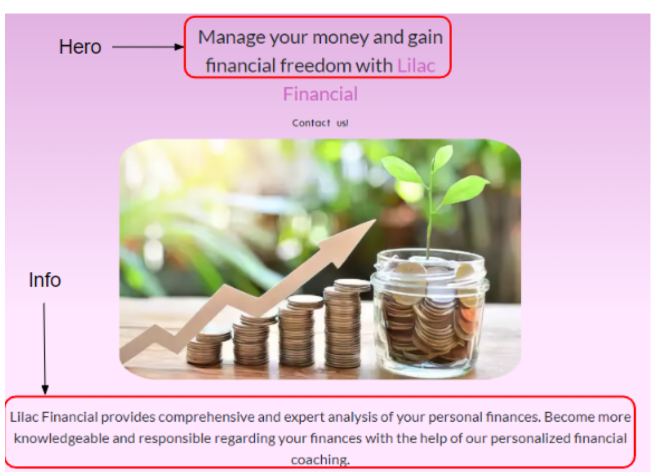




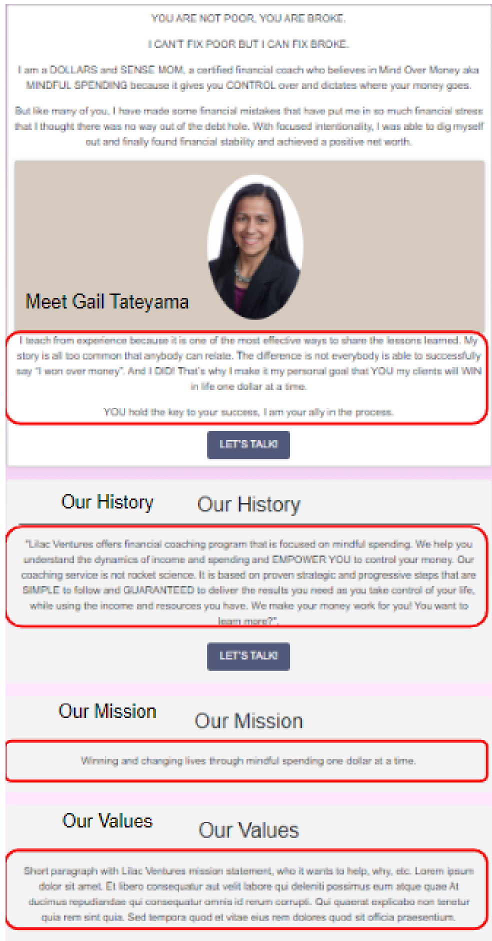
NOTE: There is not a specific order to get either the viewers or the editors - i.e, the "Edit Mode" checkbox can be checked before selecting a page to view.

Viewers and Corresponding Sections

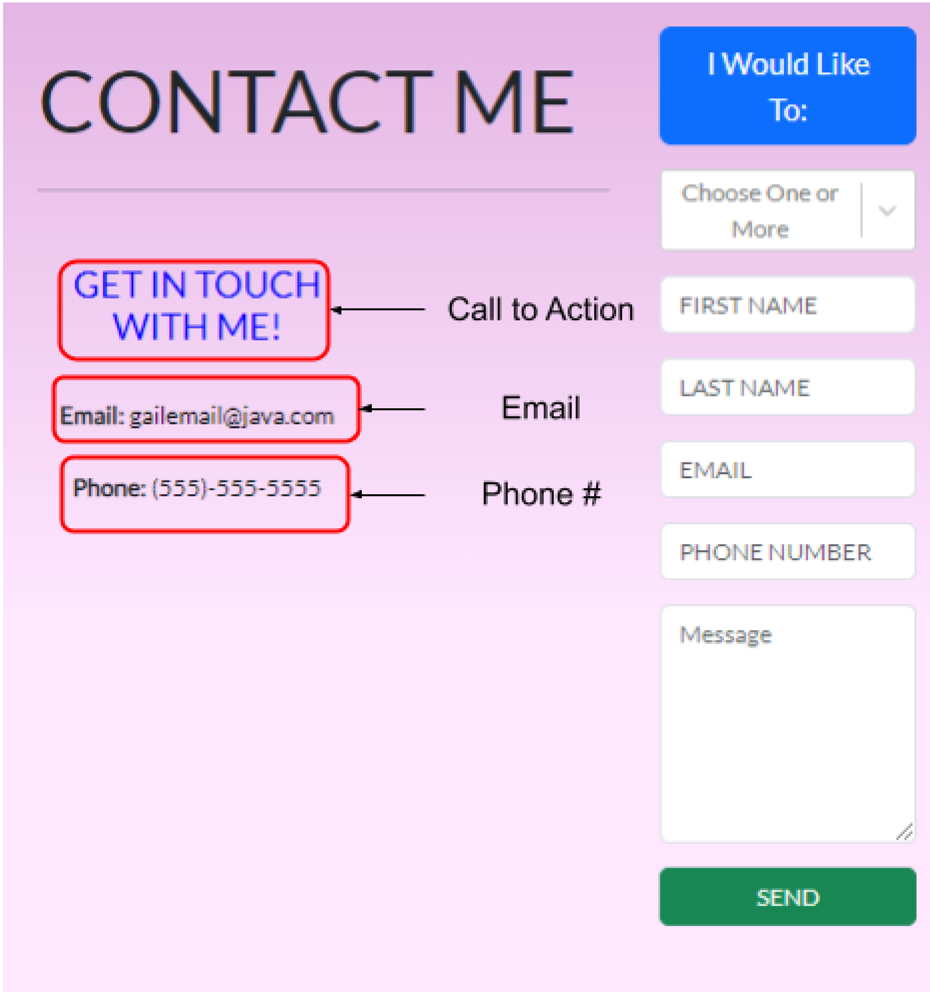
- **Homepage View:**



- **About View:**

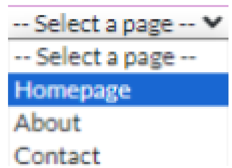


- **Contact View**


CONTACT ME
GET IN TOUCH WITH ME!
Call to Action
Email: gailemail@java.com
Email
Phone: (555)-555-5555
Phone #
I Would Like To:
Choose One or More
FIRST NAME
LAST NAME
EMAIL
PHONE NUMBER
Message
SEND

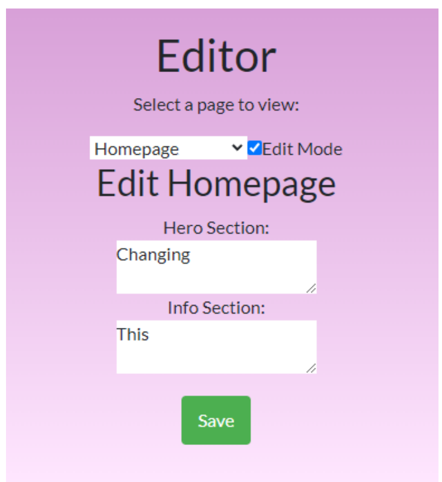
Editing a page

1. Do these in **either order**:
    a. Choose a component in the drop down menu

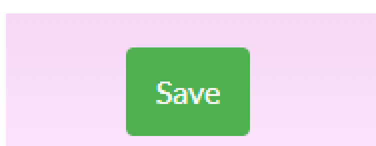


    b. Toggle the editor by checking the “Edit Mode” checkbox.

2. Change the text of the corresponding sections that you want to change.



3. Click the green “Save” button to save the changes made.



    a. NOTE: IF YOU LEAVE CERTAIN SECTIONS BLANK, THEN UPON CLICKING THE SAVE BUTTON, THEN THOSE CORRESPONDING SECTIONS WILL ALSO BE BLANK!

Login

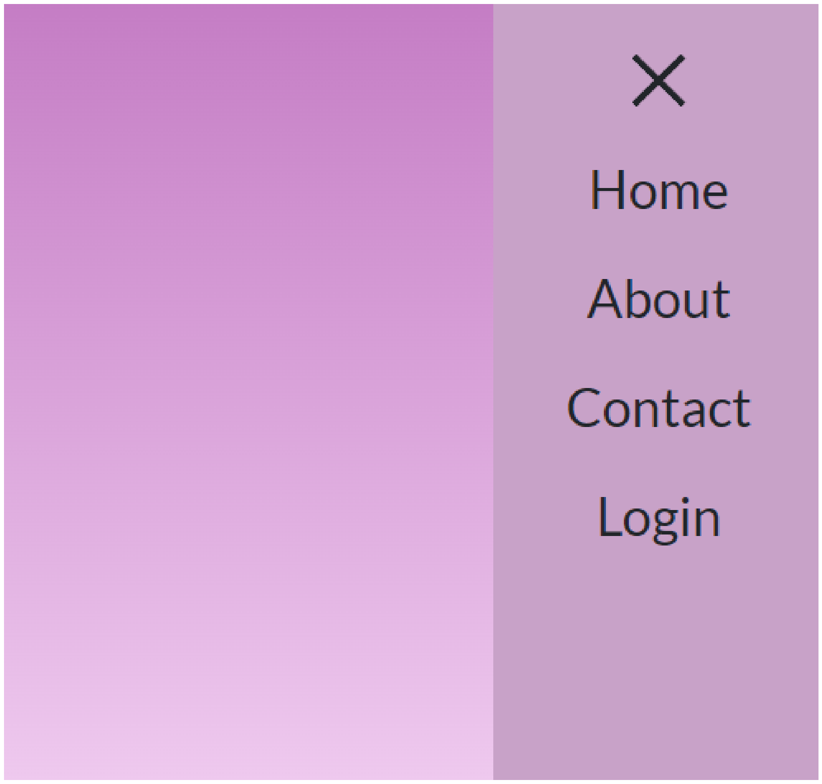
As both the customers and the administrator, the login page serves as the entry point to accessing their respective portals securely. Customers input their unique credentials generated for them by the administrator to gain access to their accounts. These unique credentials are the following two parameters: username and password. The username, which is in the form of emails, serves as the identifier for every distinct account. The password is a combination of characters (letters, numbers, and/or special characters) which acts as a layer of security for each individual account by blocking invalid access.

Navigating to the login page

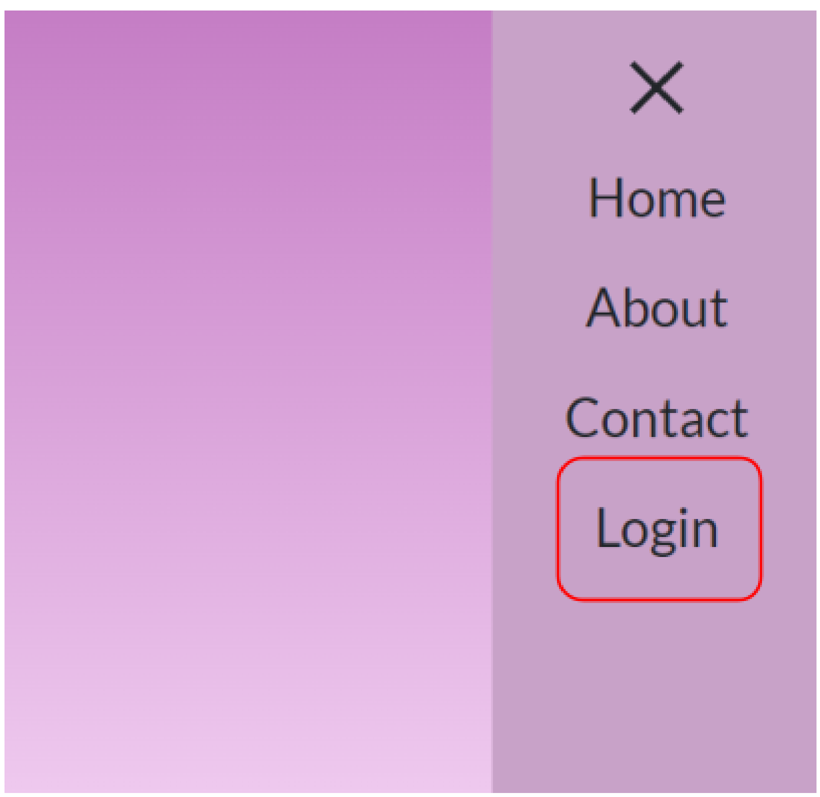
1) Upon entering the website, you are presented with the home landing page.

2) Open the navigation bar by clicking on the three horizontal black lines located on the top-right of the website.

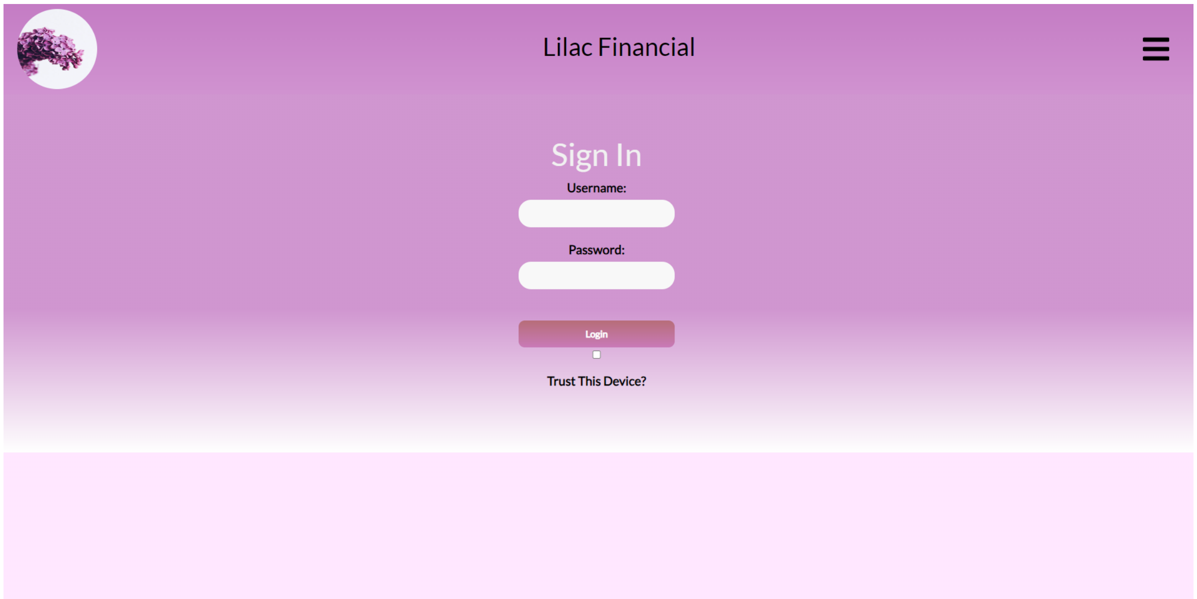
3) Upon opening the navigation bar, you are presented with 5 options: X, Home, About, Contact, and Login.



4) Out of these 5 options, click on the “Login” option.



5) You have successfully navigated to the login page.



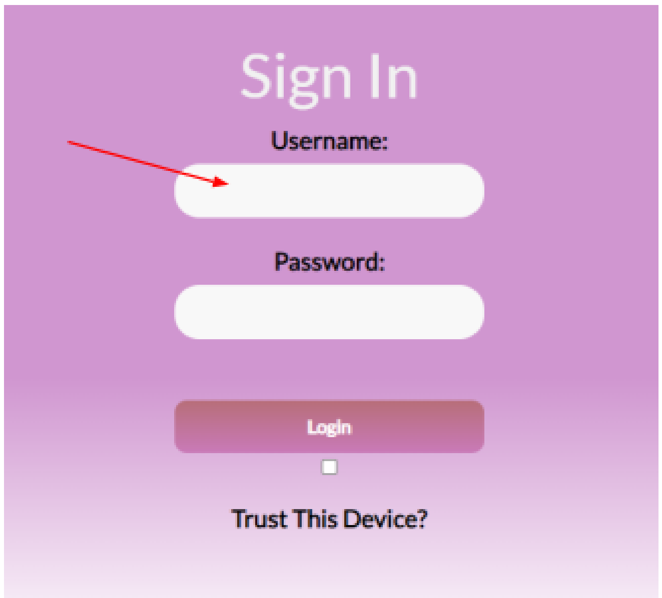
Login interface overview

The following is a brief overview of what each component in the login page does.

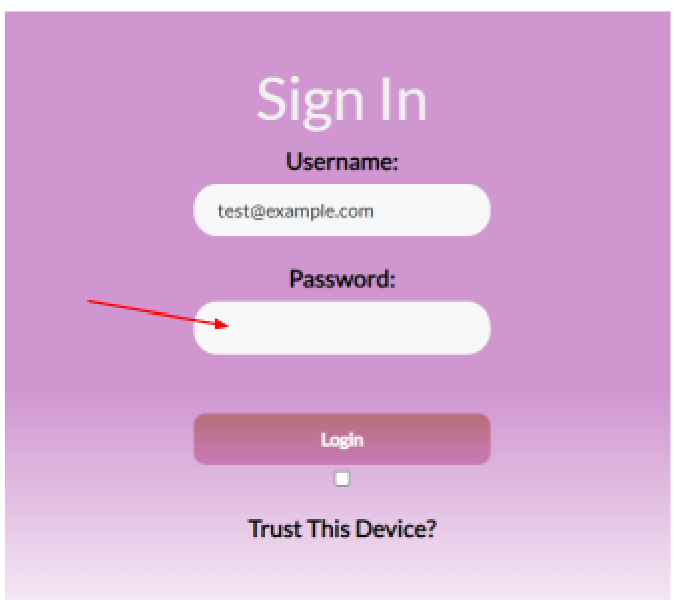
1. **Sign In:** This is simply a visual that acts as an indicator that you are currently in the login page.
2. **Username:** This is a text field where you will input your unique identifier in the form of an email.
3. **Password:** This is a text field where you will input the password that corresponds with your unique identifier.
4. **Login:** This is a button where, upon clicking it, it checks if the inputted username and password are valid.
5. **Trust this Device?:** This is a checkbox where, upon clicking it, puts a checkmark on it.
    a. If there is a checkmark, then that will keep you logged in to the website even if you refresh the page or close the tab. You will be kept logged in until either:
        i. You manually log out.
        ii. 24 hours pass.
    b. If there is not, then you will be logged out if you refresh the page or close the tab.
    c. **ONLY CHECK THIS CHECKBOX IF YOU ARE CURRENTLY USING A TRUSTED DEVICE!**

Logging in is as a customer or an admin

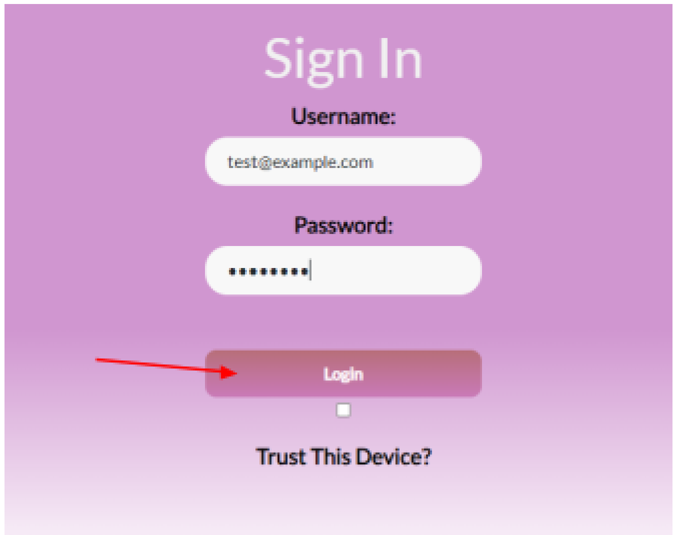
1. Type your unique identifier/username into the username text field.



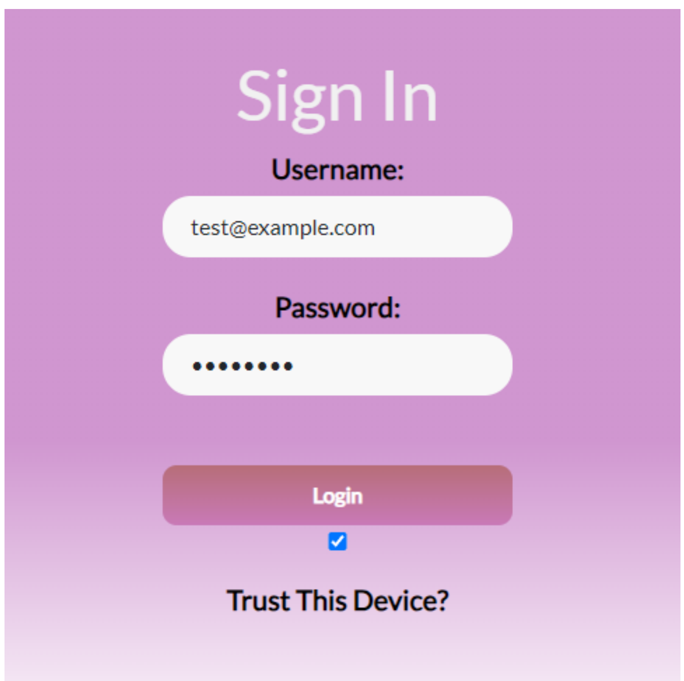
2. Type your password that corresponds with your unique identifier/username.



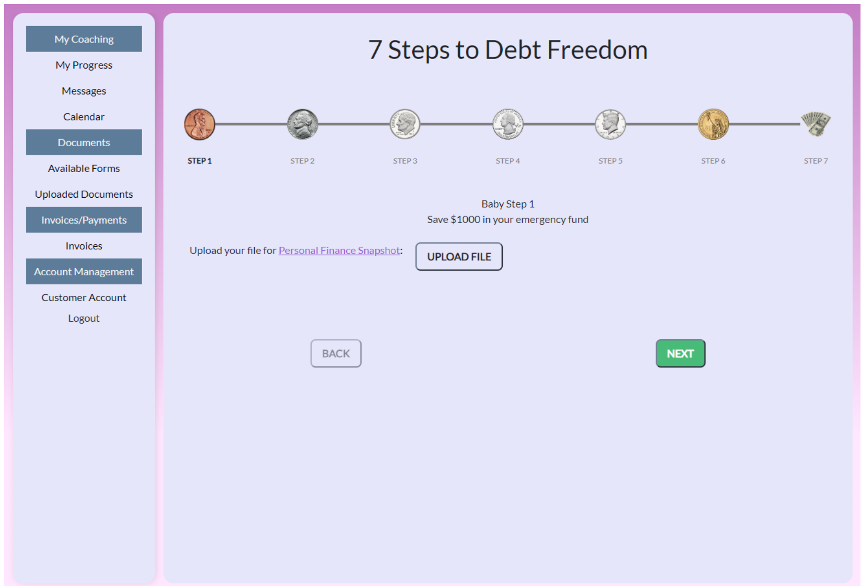
3. Click on the login button.



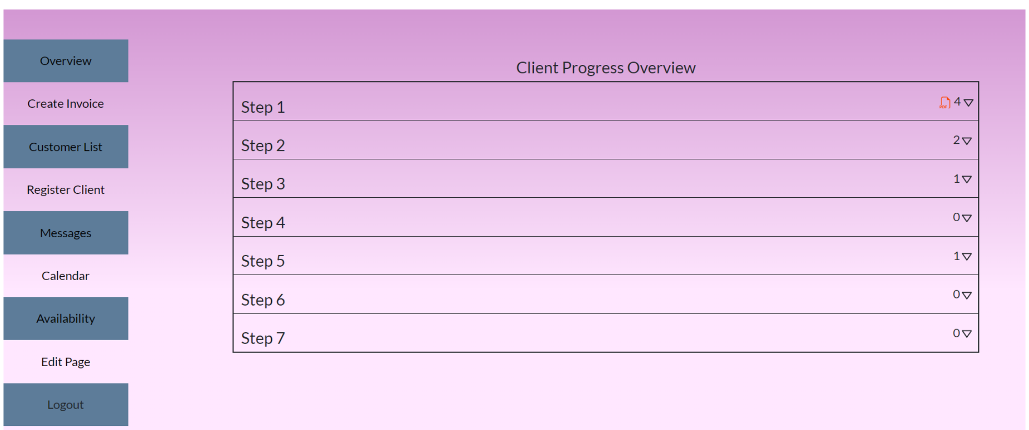
a. **(OPTIONAL)**: Check the “Trust this Device?” checkmark if you want the device you are using to be stayed logged on your account.



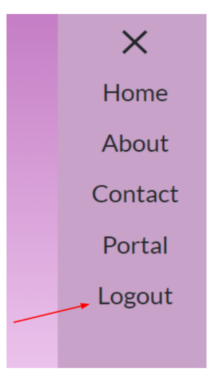
4. Upon a successful login, you will be sent to one of two portals depending on if you are a customer or an admin.
   a. If you are a customer, you will be redirected to the customer portal:



b. If you are an admin, you will be redirected to the admin portal:



5. To log out, both customers and the administrator will have 2 options:
   a. **Navigation Bar:** On the navigation bar, click on the “Logout” option.



b. **Respective Portals:** Click the Logout button located in the left side-bar.

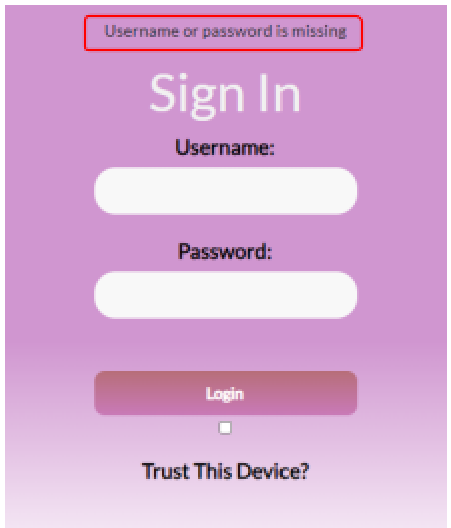
i. For customers:

ii. For admin:

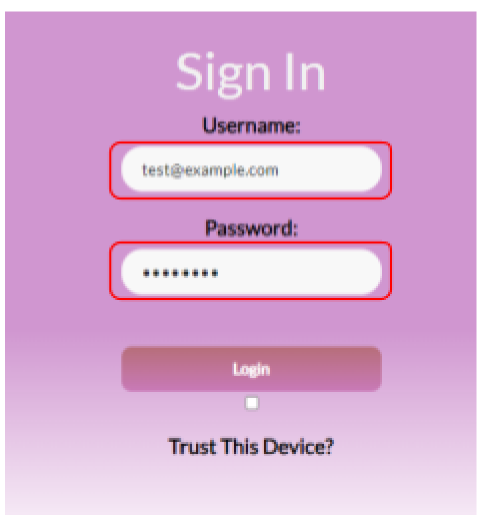
Login errors

There are three types of errors that you may encounter when trying to log in: “Username or password is missing”, “Incorrect username or password”, or “No response”.

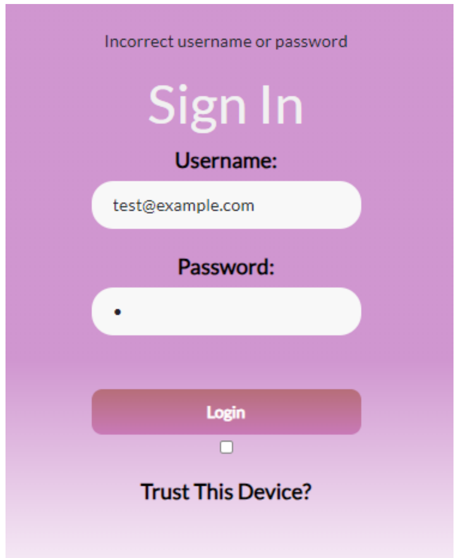
1. **“Username or password is missing”:** This error message is sent when either the username, the password, or both are missing from the credentials text fields.



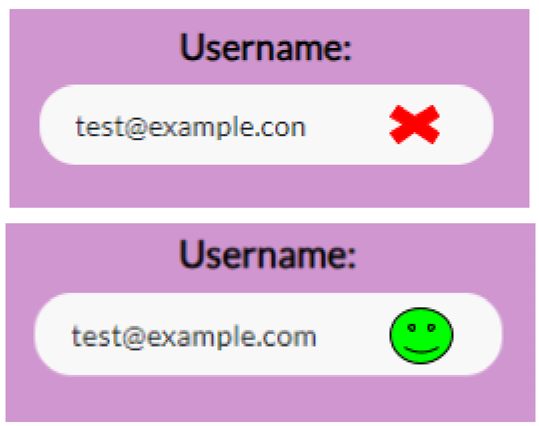
   a. How to fix this:
      i. Ensure that both the username and the password are filled out.



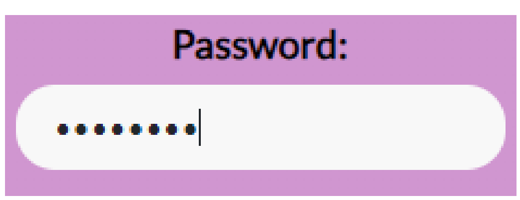
2. **"Incorrect username or password":** This error message is sent when you enter an invalid username, the wrong password for a given username, or an invalid username and password.



   a. How to fix this:
      i. Ensure that the username is correctly spelled.



      ii. Ensure that the password is correct by checking that it is spelt correct and that the casing matches.



3. **“No response”:** This error message is typically sent when the server for the website is down.
    a. How to fix this:
        i. If you are getting this response, then this may mean the server is down for maintenance. As a regular user, you may have to wait until the servers are running again to log in to your account.
        ii. In case of an emergency, please contact the administrator.

Messaging

Overview

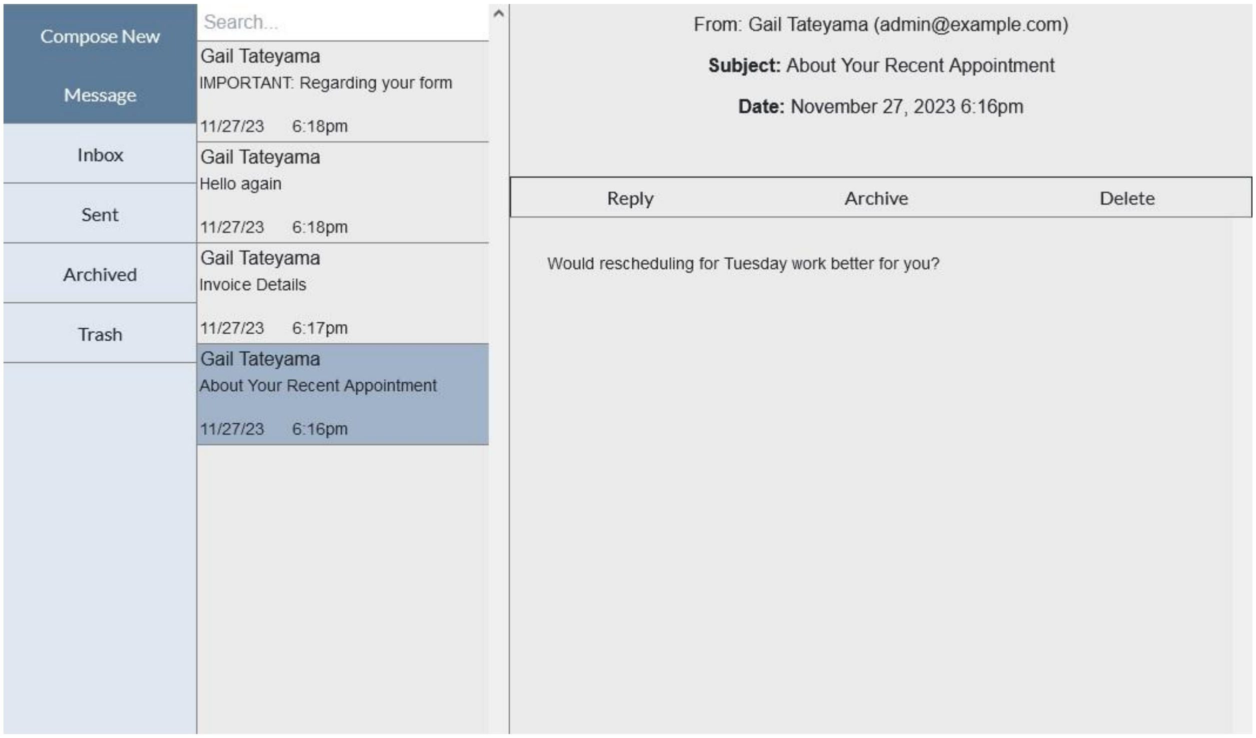


Figure 1: Overview of Messaging Interface: Compose Message Button/Folder Selection in the leftmost column; Message Selection in the middle column; Message view/Compose Message view in the rightmost column (See Figure 2 in "Composing a New Message" subsection for visual of Compose Message View).

The messaging page allows the administrator and clients to exchange text messages between one another. Messages can be created and sent, replied to, archived for easier retrieval, or moved to a "trash" folder if deemed unimportant or outdated.

Composing a New Message

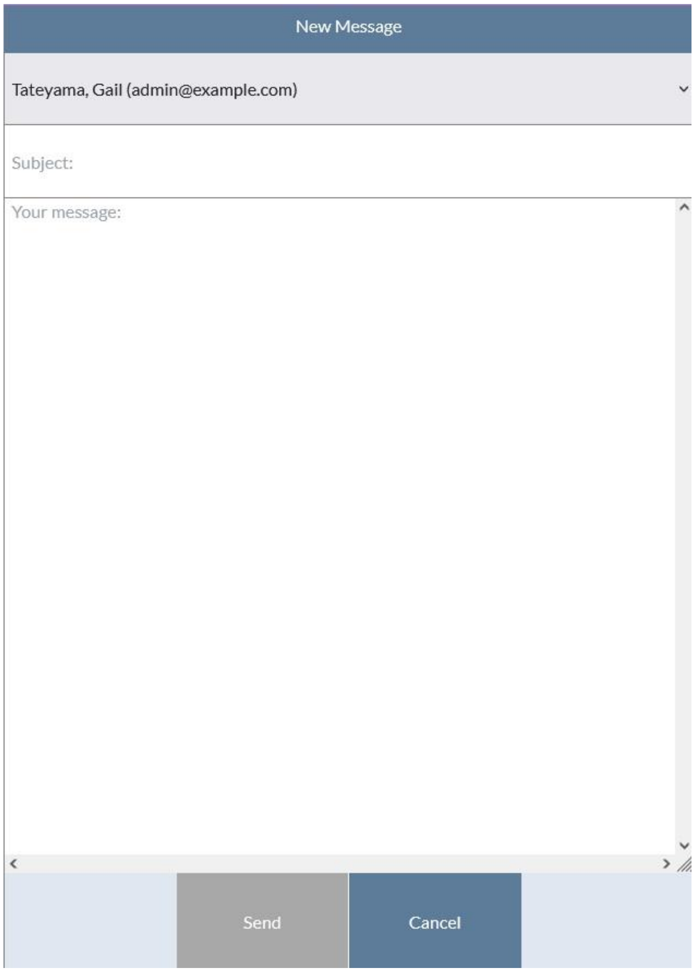


Figure 2: Compose Message View

Clicking the “Compose New Message” Button in the leftmost sidebar will open the compose message view in the rightmost column of the Messages view. In the top row of the view, a dropdown menu allows the user to select the recipient of their message. If the user is an **administrator,** this dropdown will include a list of all clients currently registered. If the user is a **client**, this dropdown will only include administrators. The subject field allows the user to specify the subject of their message. This subject is what will be displayed in the recipients inbox when the message isn’t opened. The body field allows the user to type the actual contents of their message. Messages can only be comprised of text and will be formatted as typed in the window, with tabs and whitespace applied accordingly. The “Send” button will send the message to the selected recipient. *(Note: the user cannot send a message unless both a subject and body are specified).* The “Cancel” button will close the Compose Message View.

Folder Selection

Figure 3: Folder Selection

Clicking any item in the folder selection column will open the corresponding folder and display all messages in that folder in the message selection column.

- Messages received and sent are automatically displayed in the corresponding folders “Inbox” and “Sent” unless marked as “Deleted”.

- Both sent and received messages that are marked as “Archived” will display in their corresponding folders, as well as in the “Archived” folder, unless marked as “Deleted”.

- Messages marked as “Deleted” will display in the “Trash” folder regardless of whether they are “Received”, “Sent”, or “Archived”, and will not appear in their corresponding folders unless they are restored. If a message marked as “Archived” is restored from the “Trash” folder, it will appear back in the “Archived” folder.

Viewing and Interacting with Messages

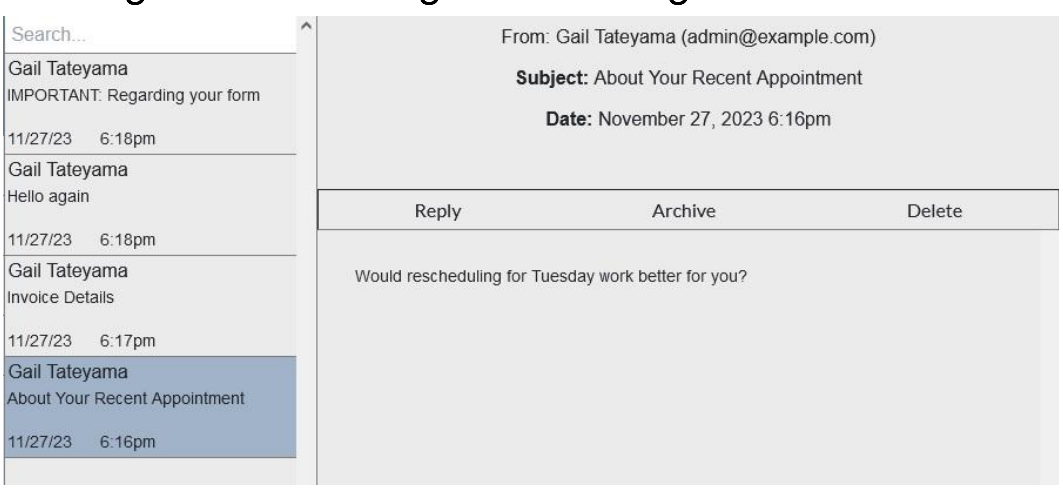


Figure 3: Message list and Message view

Clicking on a message in the message list will open that message and display its contents in the message view column.

The top line in the header of the message view column will display the *sender* of the message if the current user viewing that message is the recipient, or display the *receiver* of the message if the current user is the sender. The subject portion of the header displays the subject of the message, and the Date portion of the header displays the date and time that the message was created.

The toolbar in the message view displays three buttons:

- “Reply” will open the Compose Message View with the recipient already selected as the user who sent the message, and the subject automatically filled as “RE: {*subject of received message*}”.

- “Archive” will mark the message as “Archived” and copy it to the corresponding folder for easier access later. If the message is already marked as archived, the “Archive” button will display “Unarchive”, and will remove the message from the “Archived” folder.

- “Delete” will mark the message as “Deleted” and move it to the “Trash” folder. If the message is already marked as deleted, the “Delete” button will display “Restore”, and will remove the message from the “Trash” folder and back to its corresponding folder, as well as into the “Archived” folder if it was marked as such.

Searching for Messages

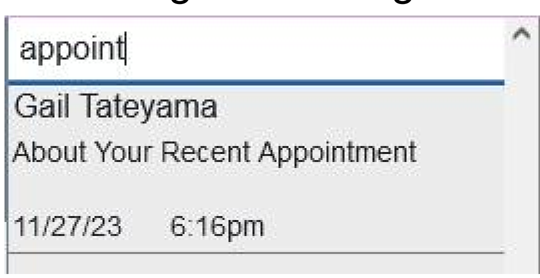


Figure 4: Example of Searching through Message List

At the top of the Message selection column, there is a search bar that can be used to filter the messages shown in the view. The user can type in specific search terms, and only messages containing those terms will be shown in the list view. The user can also type in names if they wish to filter messages where the sender or receiver has a particular name. The search bar is not case-sensitive, so proper capitalization isn’t necessary when searching through messages.

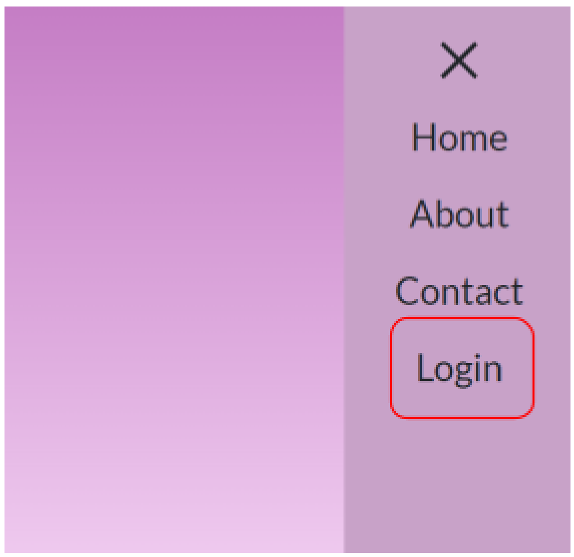
First Time Login

Navigating to First Time Login

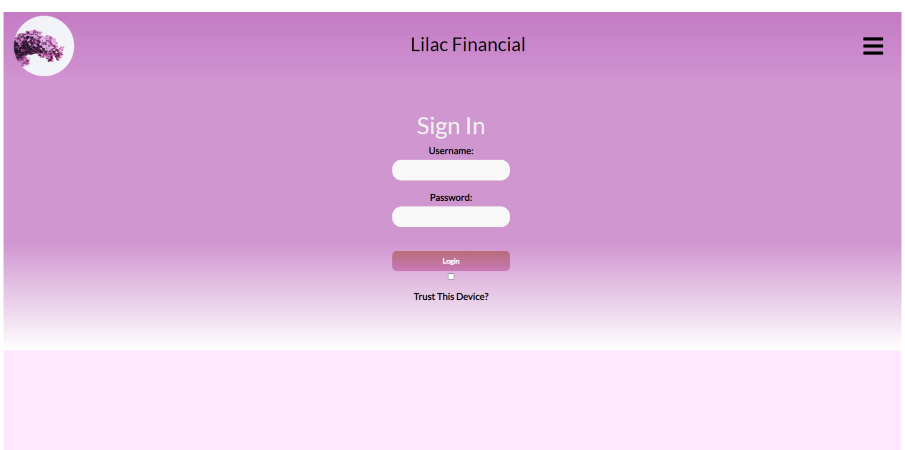
1) Open up the website and view the homepage.

2) Click the 3 dashes in the top right hand corner to access the menu navigation

3) Click on the “Login” option.

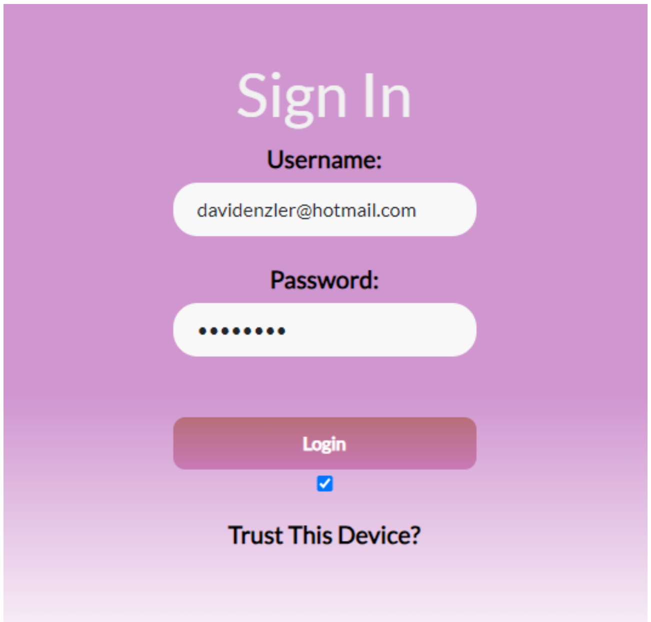


4) Once on the login page, begin inputting the credentials given to you.

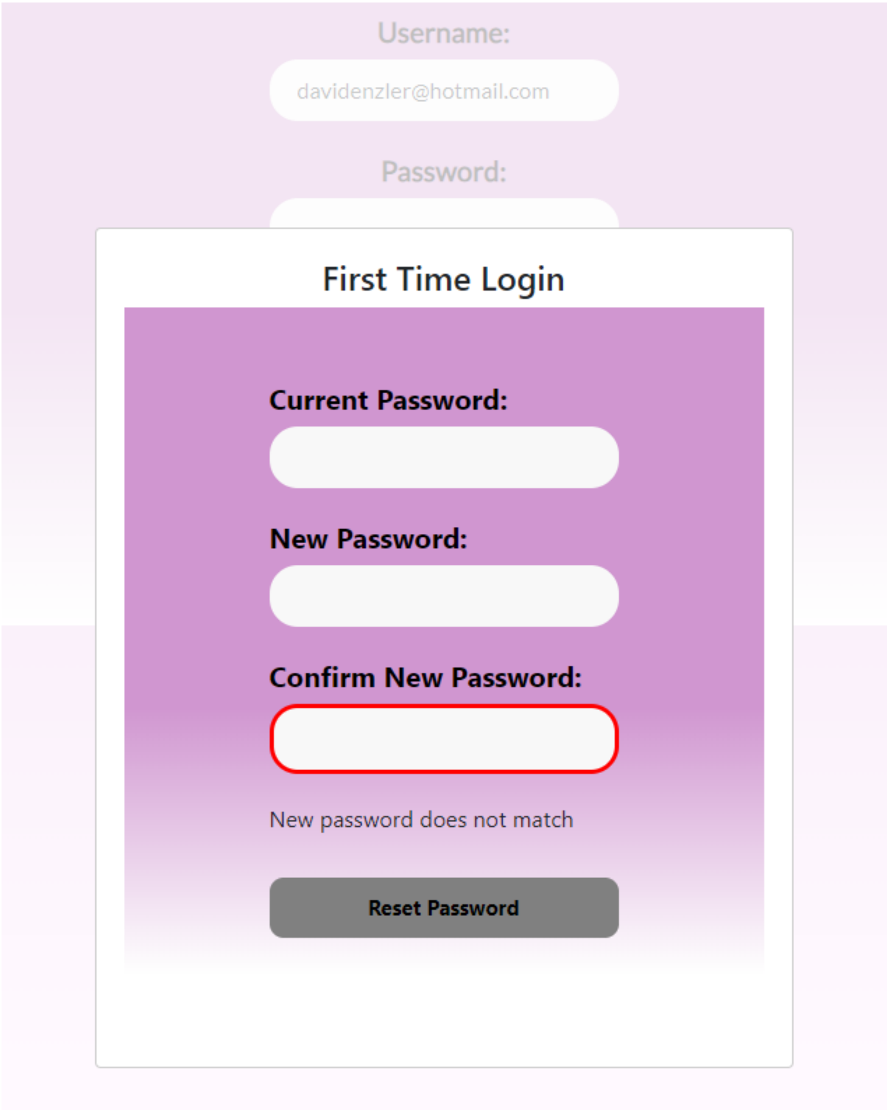


Revealing first time login modal

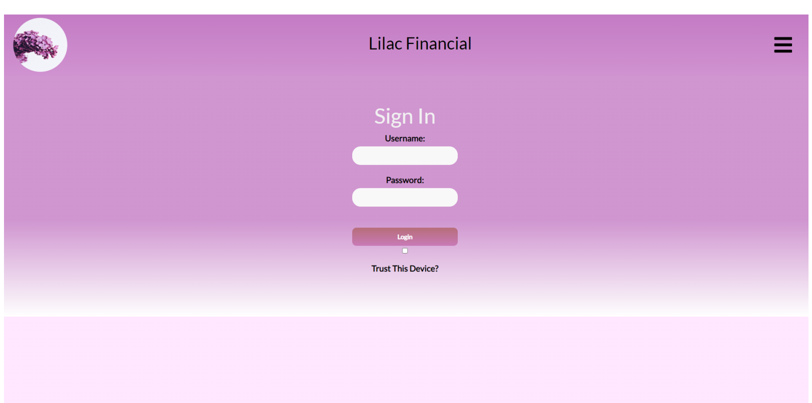
1) Once on the login page input the credentials given to you and click the Login button



2) If the login is your first time logging in, a pop-up will appear like the one below



3) Enter in the fields the information required such as current password, the new password of your choice, and then confirming said new password
4) This will reset the password given to the user with the one that they chose, and immediately redirect them back to the original login page to login with their newly updated credentials



Where to go from here? Some general tips on growing the site via SEO compliance:

Industry-Specific SEO for Financial Services

Target Industry-Specific Keywords:

Conduct keyword research focusing on terms specific to financial services. Don't overlook terms that might seem too plain or generic - remember that your customers often not only don't know much about finances (hence their reaching-out to you), but also aren't sure exactly what terms they should be googling to find your site and help in the first place. This could include generic and/or localized terms like "financial planning," "investment advice," and more specific terms like "retirement planning in California." Of course, we defer to your expertise on such matters!

You don't have to go it alone - there are some great tools for this nowadays, such as Google Keyword Planner, SEMrush, or Ahrefs for doing additional research.

Regular updates:

One way to grow the site might be to include a financial advice column or something similar, as a way to regularly bring people back to the site. That alone can improve the SEO ranking, but it will also benefit from the regular site changes, which tells Google that this is a site that is still currently active, and should be prioritized over less active and 'dead' websites.

Compliance and Trustworthiness:

This is a great time to show off - the website would greatly benefit from the inclusion of any certifications, awards, or other industry recognition you've earned over the years, to build trust and credibility.

Local SEO for California

Local Keyword Optimization:

Assuming you want to confine your clientele to local customers for now, it can help to include California-specific terms in your content, such as "financial advisors in Sacramento" or "Sacramento investment help."

Optimizing for local (and locally-known) search phrases can give you a competitive edge as well - for example, someone living in Nevada or New York probably doesn't know that we refer to West Sacramento as "West Sac" locally.

Google My Business and Local Listings:

Set up and optimize your Google *My Business* profile, which is crucial for local SEO - Google likes it when you use their tools! And make sure your business name, address, phone number, and services are consistent across all listings.

Local Link Building:

Backlinks are a big deal - if possible, try to acquire backlinks from California-based websites, local news sites, financial blogs, and business associations. This helps improve your local authority and relevance, drives customer traffic organically, and is something that Google likes to see, so it'll boost your SEO ranking in more ways than one.

Customer Reviews and Testimonials:

Encourage satisfied clients to leave positive reviews on Google, Yelp, and other review platforms. Respond to reviews professionally and comprehensively, addressing any concerns - to not only satisfy those clients further, but demonstrate your expertise to other prospective clients who may happen upon the review.

General SEO Strategies

On-Page Optimization:

Ensure that your website has a clear, logical structure with a sitemap submitted to search engines. You'll probably want a web developer's help for this - submitting a sitemap requires some programming knowledge, but is otherwise fairly straightforward and can be a big boost in your SEO ranking with Google.

User Experience and Site Performance:

There are a few ways that the site can still be enhanced, to really take things to the next level, especially in terms of SEO: some ideas we had include the website's loading speed (especially loading forms), mobile layout responsiveness, and the overall user experience such as accessibility and UX particularities. If we'd had more time, we had these on our itinerary to get to, but the school semester was only so long.

Social Media Presence:

This is the obvious one, but it bears repeating that it's important to maintain an active social media presence, sharing your content and interacting with your audience. This can help increase traffic to the site and brand awareness overall.

Analytics and Monitoring:

Regularly monitor your website's performance using tools like Google Analytics (remember, Google likes when you use their tools!). Keep track of organic traffic, keyword rankings, and user engagement metrics to understand what works and what could benefit from some further refinement.