# Sicuro Group Portal Development Functions

## In this document you will be able to understand the functions for developing customer portals.

The function of the portal for Sicuro Group will be to seamlessly onboard new customers.

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| Module | Sub Module | Description |
| Accounts | Super Admin  Employees  Customers | Customer can’t see other customers, only admin  Admin - employees  Super Admin |
| Forms & Form notifications | Questionnaires  Email out reminders | Customer must fill out onboarding forms when they sign up which is part 3 in the onboarding  Admin will have access to the form fills made by customers  Forms will be send to admin, form submissions will be stored in customer folder |
| Contact List | Contact Details  Only admin can see this | I have a contact list which states their details and some other info like the services they are engaged in. date created. Invoice status (paid, sent, due etc)  Include customers website details, email details and social media details in the registration form. |
| File Manager system | Folders   * Images * Logo * Written content//documents * Form answers   Clients have access to their own folders | http://skote-v-light.react.themesbrand.com/apps-filemanager |
| Onboarding Checklist | I want it to look something like this: - I will send video separately  Is it possible for admin to be able to change/add/remove questions etc? | 1. Verify email address after signup Then use this (http://skote-v-light.react.themesbrand.com/auth-two-step-verification) 2. Complete registration    * Sign up and details form (name, company, email, etc) 3. Fill out questionnaire (select what services you will be engaging in, depending on which service they choose, the questions will slightly change)    1. Services include: Website development, social media marketing, Logo & graphic design creation, paid advertising, automation |

# Onboarding checklist break down

**Step 0. Welcome to Sicuro Group - thanks for signing up.**

Verify your account via email

**Step 1. - Tell us abit about yourself**

Please enter your details.

* Your Name
* Your role

**Step 2 - Registration of company details**

Please enter your details

* Upload current logo (if you have one)
* Business Name
* Business Email
* Business Phone
* Business Address
* Website (if you have one)

**Step 2a - Getting to know your business.**

* Introduction
  + Give us a bit of context about your business. What does your company do? What are your products and/or services?
* USP’s (Unique Selling Points)
  + What are your unique selling points? What is the strength of your proposition? Why would a customer choose you over one of your competitors?
* Competitors
  + Who are your main competitors? Please provide there website addresses.
* Target Market
  + What is your niche market? Who is your target audience? (e.g. age, gender, location, socio economic status)
* Customers/Clients
  + Please describe a typical customer/client of your business.

**Step 3 - Services you are engaging in**

What service are you engaging in (checklist) ?

* Website development
* Paid Advertising
* Social Media Marketing
* Logo Creation
* Graphic design (still figuring out these questions)
* Productivity and automation (Still figuring out these questions)

**Step 4 - Services expanded**

These questions will change depending on what they choose in step 3 (conditional logic).

## Website Development (Questions)

### Section 1 - Website Goals

* Objectives
  + What does your website need to achieve for your business? What will make this website a success for you?
* Goals
  + Please enter the most important goal of your website from the list below in the area opposite: o Promote a brand and image o Promote a product range o Improve access to information o Create a web presence o Increase sales leads o Other – (please specify)
* Call to actions
  + Please describe the action you would like visitors to take after visiting your website. (e.g. call a phone number, complete a form, make a comment etc.)
* Sitemap
  + Do you have any indication of what pages or sections the website should be made of? Please outline the pages and subpages required. (e.g. Home, About, Services/Products, Contact etc)
* Advanced Features
  + Does your website require any specific extra functionality? (e.g. online store, product catalogue, online directory, advanced search functionality, advanced online forms, newsletter subscription, Membership login area, online booking system, advanced gallery, online payment system, integration with existing software)

### Section 2 - Design/style

* Websites you like
  + Please send us links to websites you really like. (Minimum 3) If you have one in particular you would like to emulate, let us know.
* Websites you DON’T like
  + Please send us links to websites you dislike.
* Website Colour
  + Do you have a colour preference? Y/N If Y - please let us know your colour preference.
* Website Style
  + Please describe what style of site you are looking for: (e.g. serious, professional, creative, informal, friendly, playful, corporate , modern etc.) Please describe how you would like your visitors to perceive your new site: (e.g. friendly, corporate, serious, engaging, fun, funky, cutting edge etc.)
* Content
  + Do you have the upcoming websites content ready? (e.g. text, images) Y/N Do you need help with content creation? (copywriting, photography) Y/N
* Upload Content
  + Please upload content (MS Word Doc) Or provide Dropbox, OneDrive, Google Drive details

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### Section 3 - Hosting

* Do you currently have someone who will host your website?
  + Yes
  + No
* Other information  
   Is there anything else we should know about that is relevant?
* Wordpress Logins (URL)
* Wordpress Logins (Username)
* Wordpress Logins (Password)
* C-panel Logins (URL)
* C-panel Logins (Username)
* C-panel Logins (Password)

Awesome work! We appreciate your time to complete the form. Now sit back, relax and we’ll begin the work. Your project manager will make contact shortly. Feel free to contact us at any stage – we’re in this together and hear to help.

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## Paid Advertising (Questions)

### Section 1 - Services

* Please click the services you will be using with Sicuro Group
  + Social Media Advertising
  + Google Advertising

### Section 2 - Your offerings

* What city/country do you provide your services?
* Competitors
  + Who are your main competitors? Please provide their website addresses.
* Customers/Clients
  + Please describe a typical customer/client of your business.
* Goals
  + Please enter the most important goal of your social media from the list below.  
    Promote a brand and imagePromote a product rangeImprove access to informationCreate a web presenceIncrease sales leadsOther (please specify)
* Target Market
  + What is your niche market? Who is your target audience? (e.g. age, gender, location, socio-economic status)

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## Social Media Management (Questions)

### Section 1 - Posting

* Posting
  + What tone of voice would you like? E.g. playful, fun, professional, quirky, informative etc.
* What can't we talk about
  + If there is anything that you don’t want to have on your social media networks, let us know about it. Please specify what we can’t post.
* Are there websites that we can use for articles/blog content?
* Do you have any other comments or feedback regarding posting?

### Section 2 - Your Accounts

* What social media platforms will Sicuro Group be managing/advertising ?
  + Facebook
  + Instagram
  + Linkedin
  + Twitter
  + Google Ads/My Business
* Facebook URL
  + Facebook Credential
  + First
  + Last
* Would you like to use a different way for Sicuro Group to access your account?
  + Yes
  + No
* Do you have an Ad account ID?
  + Yes I have an ad account number
  + I’m not sure
  + I don't have an ad account number

### Section 3 - Your Website

* In order to add analytics, we need access to the backend of your website.
  + Please include your login url (e.g sicurogroup.com.au/wp-admin)
* Website Login Details
  + Username
  + Password

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## Logo design (Questions)

### Section 1- Logo Design

* Logo Text
  + Please provide the exact Text for the logo.
* Tagline
  + If you have a tagline, please let us know what it is.
* Logo Colour
  + Do you have a colour preference? Y/N If Y - please let us know your preference.
* Logo Style
  + Please describe what style of logo you are looking for: (e.g. serious, professional, creative, informal, friendly, playful, corporate , modern etc.)

### Section 2 - Logo uploads

* Upload your logo
* Logos you like
  + Please upload images or screenshots of the logos you really like. Minimum of 3 please. If you cannot provide a screenshot – please provide the website URL where the logo appears.
* Logos you DON'T like
  + Please upload images or screenshots of the logos you dislike. Minimum of 3 please. If you cannot provide a screenshot – please provide the website URL where the logo appears.
* Please upload content (MS Word Doc) Or provide Dropbox, OneDrive, Google Drive details