



CONSULTANT TRAINING DOCUMENT

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Kwikweb Consultant Training Manual

Contents

1.	Recruiting Consultant	2
2.	Consultant Portal	2
2.1	Documents	3
2.2	Notifications	4
2.3	Slack	4
2.4	Bulletin Board	5
2.5	Useful & Custom Links	5
2.6	Leads	6
2.7	Training	7
2.8	Request Sales Pack	7
2.9	Payment Reports	8
2.10	Client Reports	8
2.11	Statements	9
2.12	Sub Consultant Reports	9
2.13	Create New Site	9
2.14	Sign Electronic Debit Order	14
2.15	Add Consultant	14
2.16	Cancel Consultant Account	14
3.	Graphic Design	15
4.	Setting up of Client Emails & Email Help Website	15
5.	Training to be provided to the Client once a website has been completed	15
6.	Other Useful Information	15
6.1	Selecting Colours for Websites	15
7.	Questions	16

Kwikweb Consultant Training Manual

Although I try to make the information contained in this document as current as possible, the images contained in this document were done at the time this document was compiled and might differ from what is available on the website when you are viewing the website.

1. Recruiting Consultant

Every Consultant is recruited and trained by an existing registered Consultant. The new Consultants pays the joining/training fee directly to the Consultant who recruits and trains the new consultant. Every consultant pays R150+VAT per month and the “trainer” earns R100 pm of this. This ensures the trainer has a liability towards his sub consultant and it ensures the new recruit has a mentor.

2. Consultant Portal

The R150 monthly fee also gives you access to a **Consultant Portal**. This portal is a very important tool that you will be able to use to make a success of your business. From this portal you will have access to training videos, marketing material, training manuals.

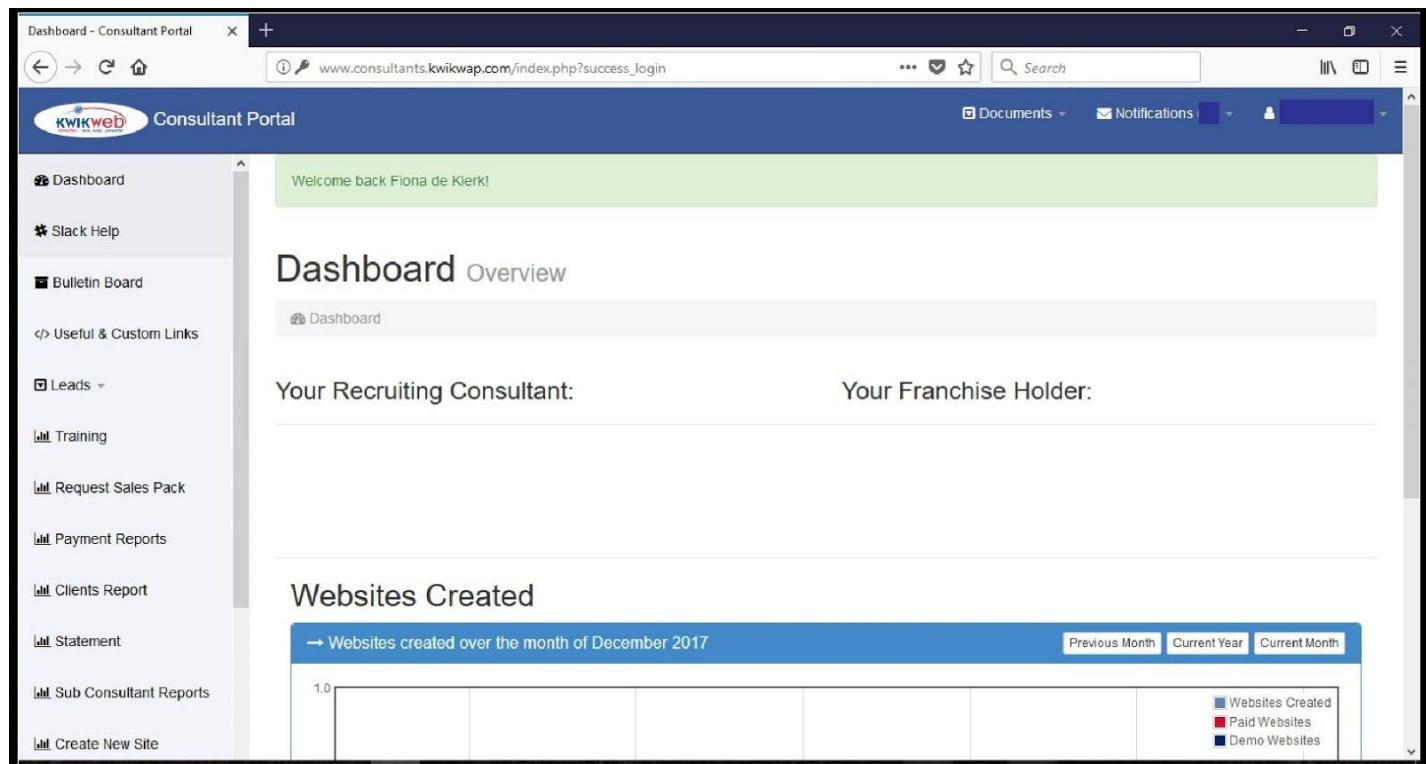


Figure 1: Consultant Portal Part 1

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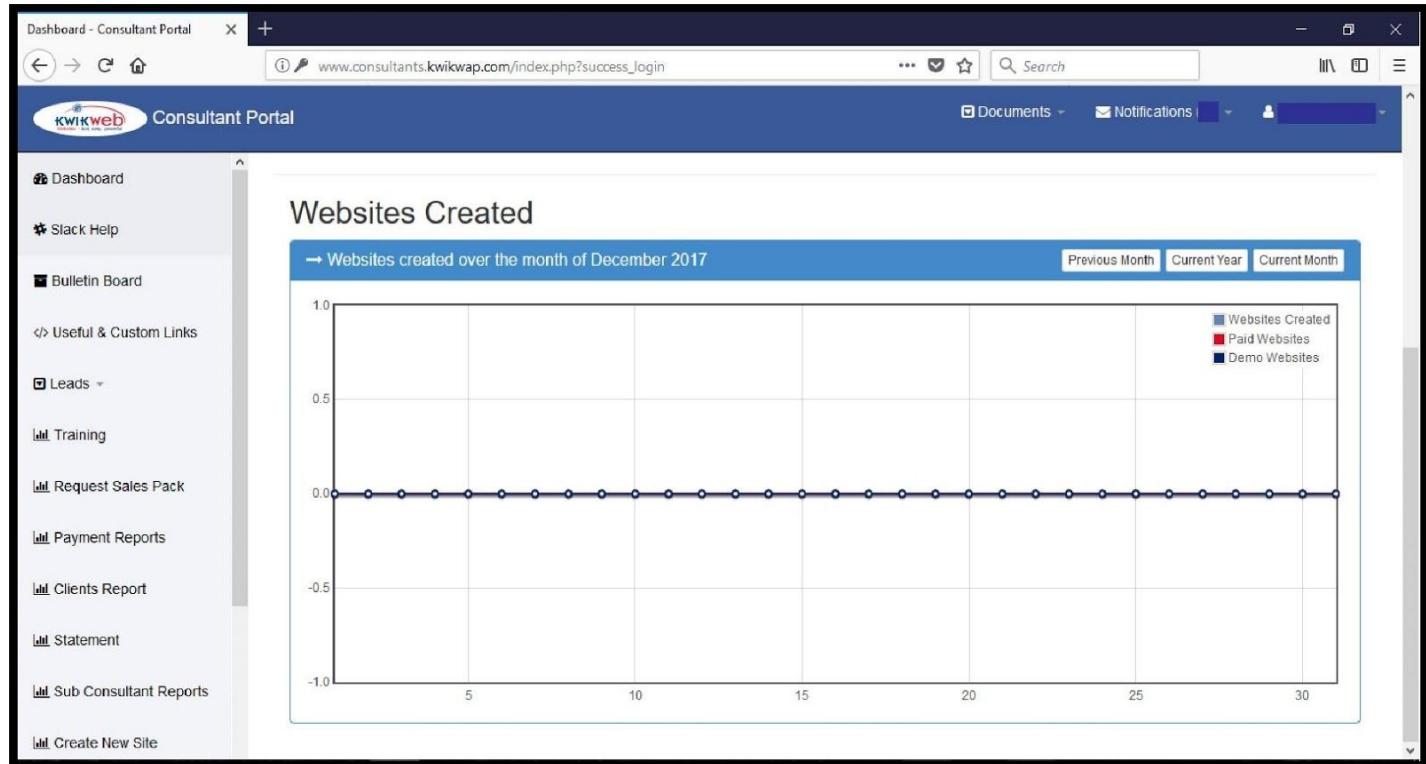


Figure 2: Consultant Portal Part 2

When you log onto your Consultant Portal, it will automatically open on your **Dashboard**. On the Dashboard you will be able to see the information for your **Recruiting Consultant & The Franchise Holder** (each Consultant belongs to a certain Franchise in the group) under which you fall. You will also be able to see information such as the number of Websites that has been created in a specific month (e.g December) and you will also be able to distinguish if they are paid or demo sites. (Refer to the small table on the top right hand side of **Figure 2**).

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2.1 Documents

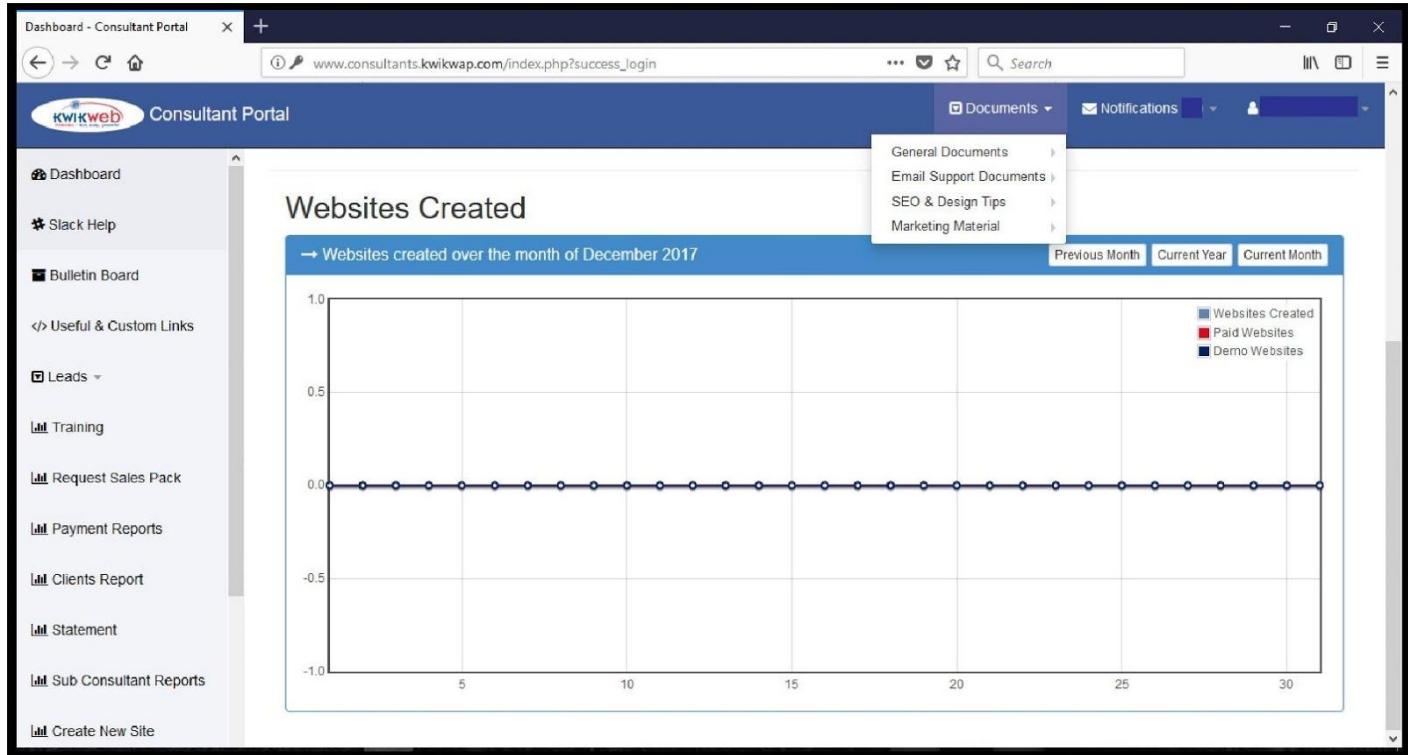


Figure 3: Documents Drop down list

When you click on the drop down list next to **Documents** on the top right hand side of your screen (**See Figure 3**) you will have options to access:

- General Documents
- Email Support Documents
- SEO & Design Tips
- Marketing Material

Each of the sections above has a drop down list. Please click on each dropdown list to see what type of information is available under each section. The information on these dropdown lists could change from time to time, so please make sure you go check it every so often.

2.2 Notifications

You will find the Notification section on the top right hand side of your screen. Usually you will receive a duplicate copy of the notifications listed here, in your email inbox that you used when you were registered as Consultant, but should you wish to refer back to it at a later stage, this is where you will find it.

Please note that your screen might look different to the one below, as you will start receiving the Notifications (as and when they are issued), from your registration date as a Consultant. (**Refer to Figure 4**)

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The screenshot shows the 'Notifications' section of the Kwikweb Consultant Portal. On the left, a sidebar lists various sections: Dashboard, Slack Help, Bulletin Board, Useful & Custom Links, Leads, Training, Request Sales Pack, Payment Reports, Clients Report, Statement, Sub Consultant Reports, and Create New Site. The main area is titled 'Notifications' and shows a table of notifications. The table has columns for Status, Date, From, Subject, and Actions. The notifications listed are:

Status	Date	From	Subject	Actions
Unread	2017-12-01 12:25:36	Sentido	Kwikweb Newsletter- 8 NB points	[link]
Read	2017-10-23 10:36:05	Sentido	Thursday training in Midrand->two tickets available, mobile tools, https://	[link]
Read	2017-09-22 16:22:56	Sentido	Sept 2017 newsletter - Kwikweb - 3 NB things	[link]
Unread	2017-08-31 15:59:02	Sentido	Kwikweb Newsletter - tools, compo and bla di bla	[link]
Read	2017-06-01 15:24:21	Sentido	Kwikweb June newsletter / competition / adwords / slack etc	[link]
Read	2017-04-21 14:10:50	Sentido	Follow up news - Kwikweb - April 2017	[link]
Unread	2017-04-20 12:35:04	Sentido	Kwikweb April 2017 Newsletter	[link]
Read	2017-03-01 16:44:30	Sentido	March 2017 Kwikweb competition and design assistance	[link]
Read	2017-02-17 14:59:02	Sentido	sample ecommerce sites - Kwikweb	[link]
Read	2017-01-16 12:05:59	Sentido	Website Warehouse	[link]
Read	2016-08-05 13:49:02	Sentido	Changes to the Lead System	[link]

Figure 4: Notification Screen

2.3 Slack

Slack is a fairly new, but very useful application that Head Office has set up for us to be able to get leads for people interested in becoming Consultants, or people needing a website. You can join Slack by clicking on **Slack Help** on the left hand side of your screen. Once you have joined you can download the application to your phone as well, ensuring that you have access to leads, whether you are in front of your computer or not.

To claim a lead, you need to click on “claim lead” and enter your **Consultant Code** before anyone else does. It works on a “first come, first serve” basis. If you are successful in claiming the lead first, you will have 3 days in which to convert the lead to a “New Website” or “New Consultant” after that, the lead goes back to being “fair game” and it will be opened up to any other Consultant to claim.

From time to time, if a client tries to create a website, and later changes the template he is using, the lead will come through as two separate leads. Same thing will happen if a consultant enters their details more than once, or if they enter different details on the website.

Also see section 2.6 Leads.

2.4 Bulletin Board

The Bulletin Board is similar to the Notification section in the sense that important information will get listed here from time to time. When something is posted on the Bulletin board, you need to read it first before you will be able to move to another section in your Consultant Portal.

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The screenshot shows the 'Bulletin Board - Consultant Portal' window. At the top, there's a note in red: 'NOTE: You will not be able to move away from this page until all bulletins have been read.' Below this, there are tabs for 'Unread' and 'Archived'. The main area displays an unread bulletin from April 2017, dated 13:30:31. The subject is 'April 2017 newsletter'. The message content is a long, detailed email about new website features and design options. On the left sidebar, under 'Useful & Custom Links', there are several categories: Leads, Training, Request Sales Pack, Payment Reports, Clients Report, Statement, Sub Consultant Reports, and Create New Site.

Figure 5: Bulletin Board

2.5 Useful & Custom Links

The name says it all. When you click on this section, you will see 2 tabs at the top of your screen. One for Useful Websites and one for Custom links. **See Figure 6 & 7 below.**

Again, depending on when you access this section, what you see might differ to what is showed on the images below, but you get the idea. Head Office will use this section to give you access to links and websites they have come across that you might want to use.

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The screenshot shows the 'Custom Links and Useful Websites' section of the Kwikweb Consultant Portal. On the left, there's a sidebar with various links like Dashboard, Slack Help, Bulletin Board, and Leads. The main content area has tabs for 'Custom Links' (which is active) and 'Useful Websites'. Under 'Custom Links', there's a note about identifying a new website and two links: <https://www.kwikwap.co.za/warehouse.php?conCode=810222d> and https://www.kwikwap.co.za/creation_new/create_advanced.php. The URL in the browser bar is www.consultants.kwikwap.com/custom_links.php.

Figure 6: Custom Links

The screenshot shows the 'Useful Websites' section of the Kwikweb Consultant Portal. The sidebar is identical to Figure 6. The main content area has tabs for 'Custom Links' (which is active) and 'Useful Websites'. Under 'Useful Websites', there are two sections: 'Graphic and Media Tools:' which lists websites like www.logomakr.com, gimp.org, inkscape.org, FastStone, Crello, snappa, canva, and favicon.cc; and 'Videos and Slideshows' which lists Adobe Spark, Animoto, Ripl, GoAnimate, Autodraw, and Movavi for Mac. The URL in the browser bar is www.consultants.kwikwap.com/custom_links.php.

Figure 7: Useful Websites

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2.6 Leads

If you click on **Leads** on the left hand side of your screen, a dropdown list will be displayed. The leads on each of these sections represents the leads that have either not been claimed, or have been released by other consultants.

Also refer to section 2.3 Slack.

2.7 Training

There are many training videos available on YouTube ([on the Kwikweb channel](#)) where you can see exactly how most of the modules and sections work.

You can access the YouTube channel by clicking on **Training** on the left hand side of your screen when you are logged into the **Consultant Portal**, and then clicking on the **Kwikweb YouTube Training Channel** link on the right hand side of that screen. (See the screenshot below.)

You will also be able to access other interesting and informative information in the **Training** section such as "How to use Google Business" etc. Check this section from time to time to see if there is any additional information you might find useful.

The screenshot shows a web browser window for the 'Consultant Portal' at www.consultants.kwikwap.com/training.php. The left sidebar has a 'Leads' section expanded, showing a list of training items:

Link	Date Added
→ Kwikwap Training	2016-04-29 10:15:11
How to use Gimp - Basics	2016-09-15 10:37:38
How Google Search Works	2016-09-15 10:40:52
How to use Google My Business	2016-09-15 10:43:38
SEO in under 10 Minutes	2016-09-15 10:43:38
Common SEO Mistakes	2016-09-15 10:57:08
Google Webmaster Tools	2016-09-15 11:34:20

A red button labeled 'Kwikweb YouTube Training Channel' with a play icon is visible on the right. The top navigation bar includes links for 'Dashboard', 'Consultant Portal', 'Documents', 'Notifications', and user profile.

Figure 8: Training tab on the Consultant Portal

Also refer to section 2.13 Create New Site

2.8 Request Sales Pack

Kwikweb have made every effort to ensure that we as Consultants can be successful. If you click on the **Request Sales Pack** link, you will see samples of the items contained in the sales pack that you can order from Head Office. You will find more details about the sales pack and how to order it, under the **Documents** link on the top right hand side of your screen. See Figure 9 as well as section 2.1 Documents.

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The screenshot shows the Kwikweb Consultant Portal dashboard. On the left, a sidebar lists various options: Dashboard, Slack Help, Bulletin Board, Useful & Custom Links, Leads, Training, Request Sales Pack (which is selected), Payment Reports, Clients Report, Statement, and Sub Consultant Reports. The main content area is titled "Sales Pack" and displays several promotional images. At the top right, there is a call-to-action button: "Request Sales Pack. Click Here Now!". The images include: "Flyer-Back-2016.png" (Social Media Integration, Business Marketing, BE MORE PROFESSIONAL), "Flyer-Front-2016.png" (Business Marketing [the clever way], What Can a Website Do For Your Business?, search more people, be more creative, by working smart, ADVANCED MARKETING FEATURES: BULK SMS, BULK EMAIL, UNLIMITED pages and domains, SEO), "Kwikweb Business Card Back.jpg", and "Kwikweb Business Card Front Blank.jpg". The URL in the browser bar is www.consultants.kwikwap.com/sales.php.

Figure 9: Sales Pack

2.9 Payment Reports

If you click on **Payment Reports**, you will be able to see a list with your clients' details and their payment status for the last 3 months. If the status is **N/A**, with a **Active** status next to it, it means that the first debit order has not yet been collected from the client. An **Inactive** status next to the **N/A** would indicate that the website has been made inactive, usually either due to non-payment from the client or the client no longer needs the website and have asked for it to be de-activated.

The other two options are straight forward. **Paid** meaning that the debit order was collected as scheduled. **Unpaid** meaning the client has not paid their monthly hosting fee. Should the latter be the case, you will receive an email from Head Office advising that the client debit order was not collected. You will then need to contact the client and make arrangements for the payment to either be done manually, or to be collected on the next debit order run.

2.10 Client Reports

When you click on **Client Reports** you can view all your clients, passed and present as well as the following information:

- Date that the website was created
- Company code
- Company Name
- Active or Inactive
- Paid or Unpaid
- Maintenance Contract

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2.11 Statements

The Consultant statements are usually done around the 22nd of each month. Once they have been done, you will be able to view your current statement, which will give you a breakdown of what commission was paid to you and what costs were deducted. Once you have signed up 3 or more clients, you will start earning commission and you can contact billing@kwikweb.co.za to move your monthly consultant fee from your own bank account to your statement. This will mean that instead of paying the monthly consultant fee via debit order, it will be deducted from your commission instead. You will get commission for all **active** websites you have done, less the debit order and consultant fees (R150 p.m +VAT). If the balance is more than **R200**, it will be paid out to you.

2.12 Sub Consultant Reports

If you have appointed sub-consultants (consultants that fall directly below you), then you will be able to view their details by clicking on **Sub-Consultant Reports**. You will be able to see information such as:

- a) Date that sub-consultant was appointed
- b) Consultant code
- c) Name & Surname
- d) Cell number
- e) Email address

2.13 Create New Site

When you are ready to create your first website, you can click on **Create New Site** on the left hand side of your Consultant Portal Screen. You will then have an opportunity to look at the “off the shelf” websites to see if there is an existing template, suited to your client’s needs. The templates are grouped in various categories (i.e Website template relating to Accounting will be grouped together etc.). You can **View** the website template to see get an idea of the **‘look and feel’** of the website or you can click on **Enquire Now** to use the template for your website. **See Figure 10 & 11 below.**

Once you have clicked on **Enquire Now** you will be able to enter your client’s details and create the website.

After you have supplied all the required information and clicked on **Create Website**, a message will be displayed saying **“New Website has been created”**. **See Figure 12 & 13.**

The client username will be displayed on the screen. An automated email will then be sent to both yourself and the new client with their log-on details. You can then contact your client to advise them that they should please create a folder on their email or on their computer to keep all communications from Kwikweb or yourself safe and in one place, should they need to refer to them later.

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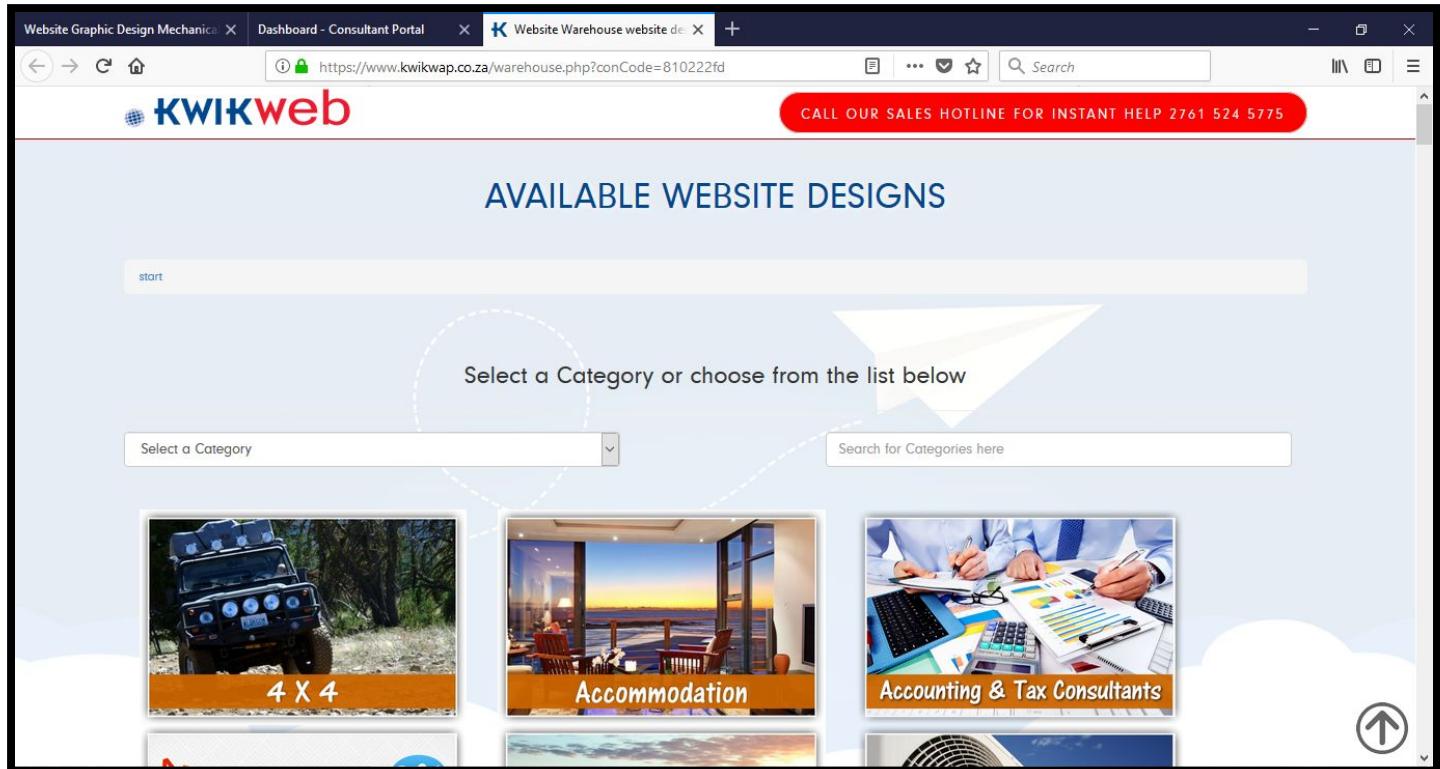


Figure 10: Choose a template

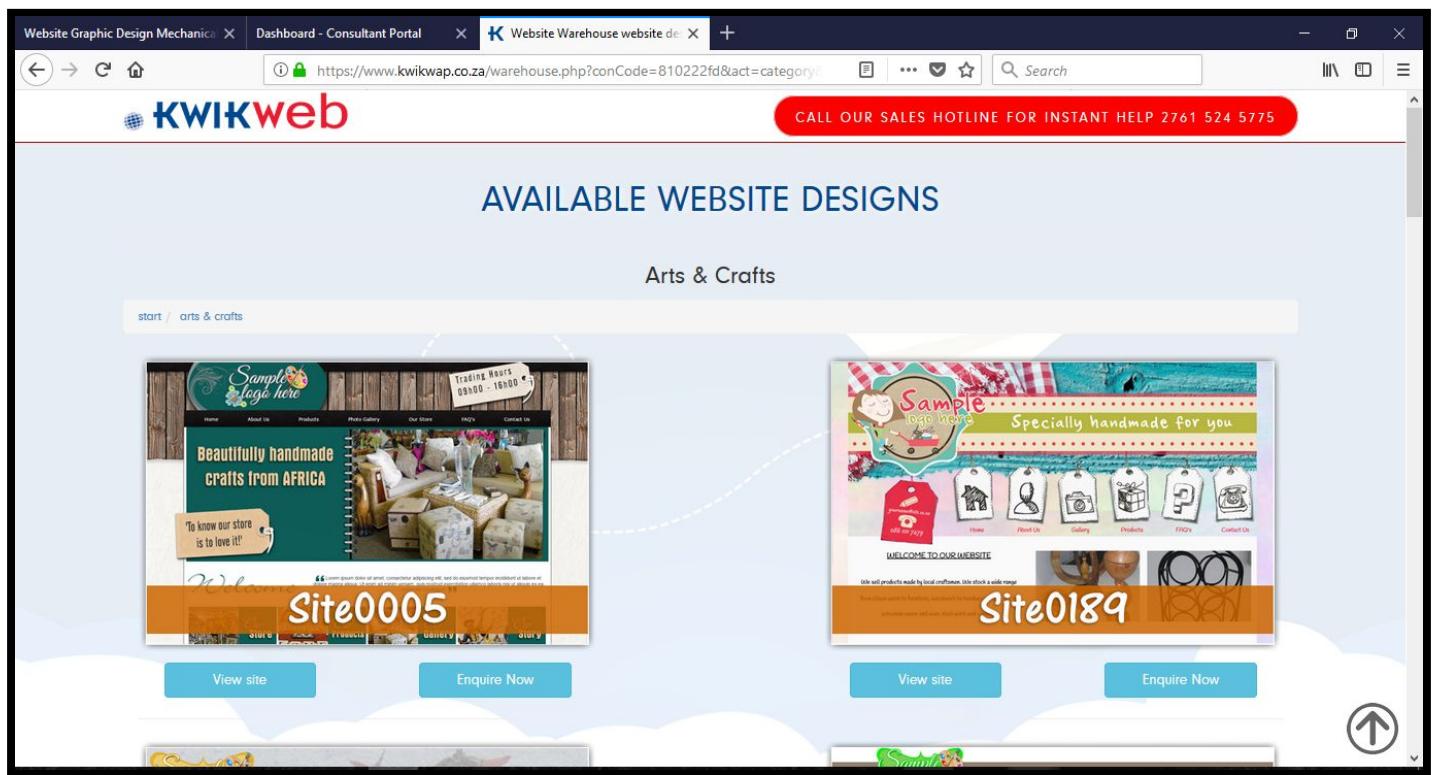


Figure 11: Arts & Crafts Website Category

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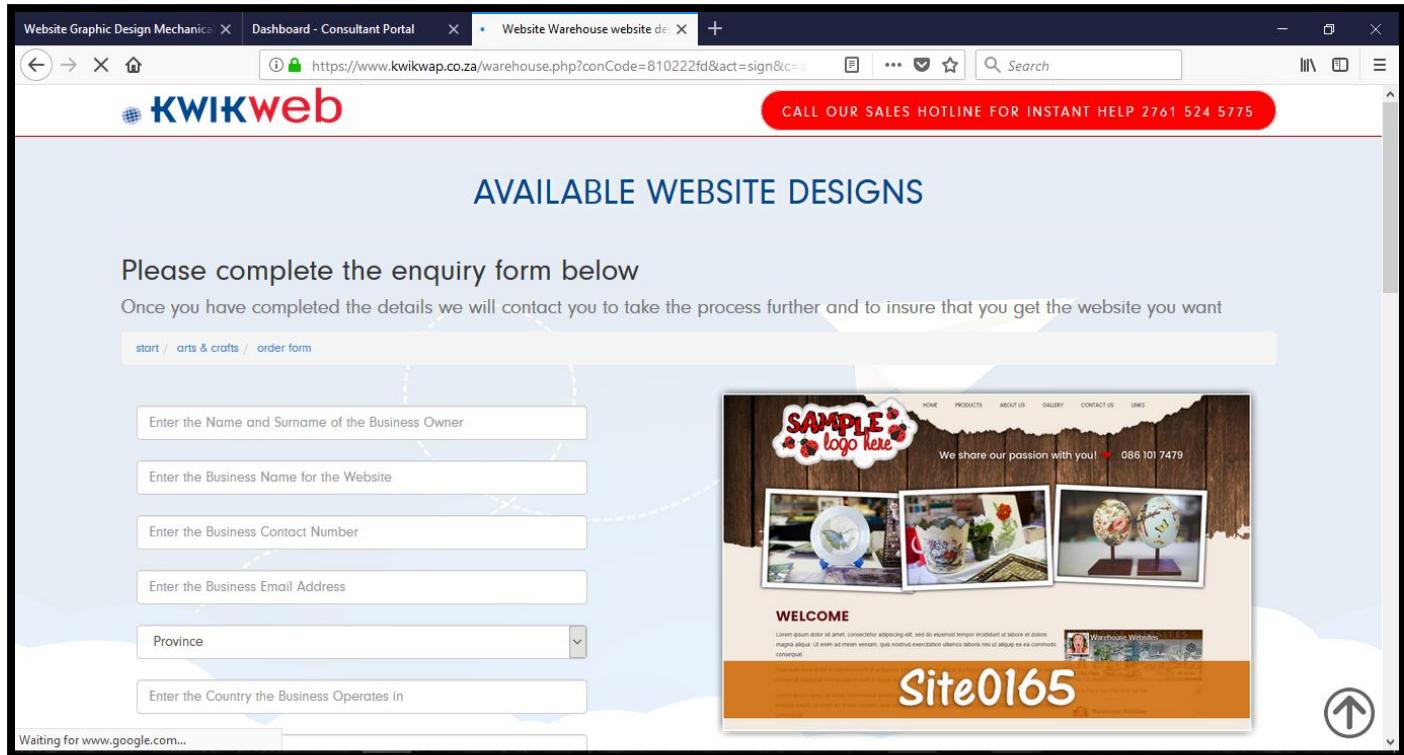


Figure 12: Enter Client details

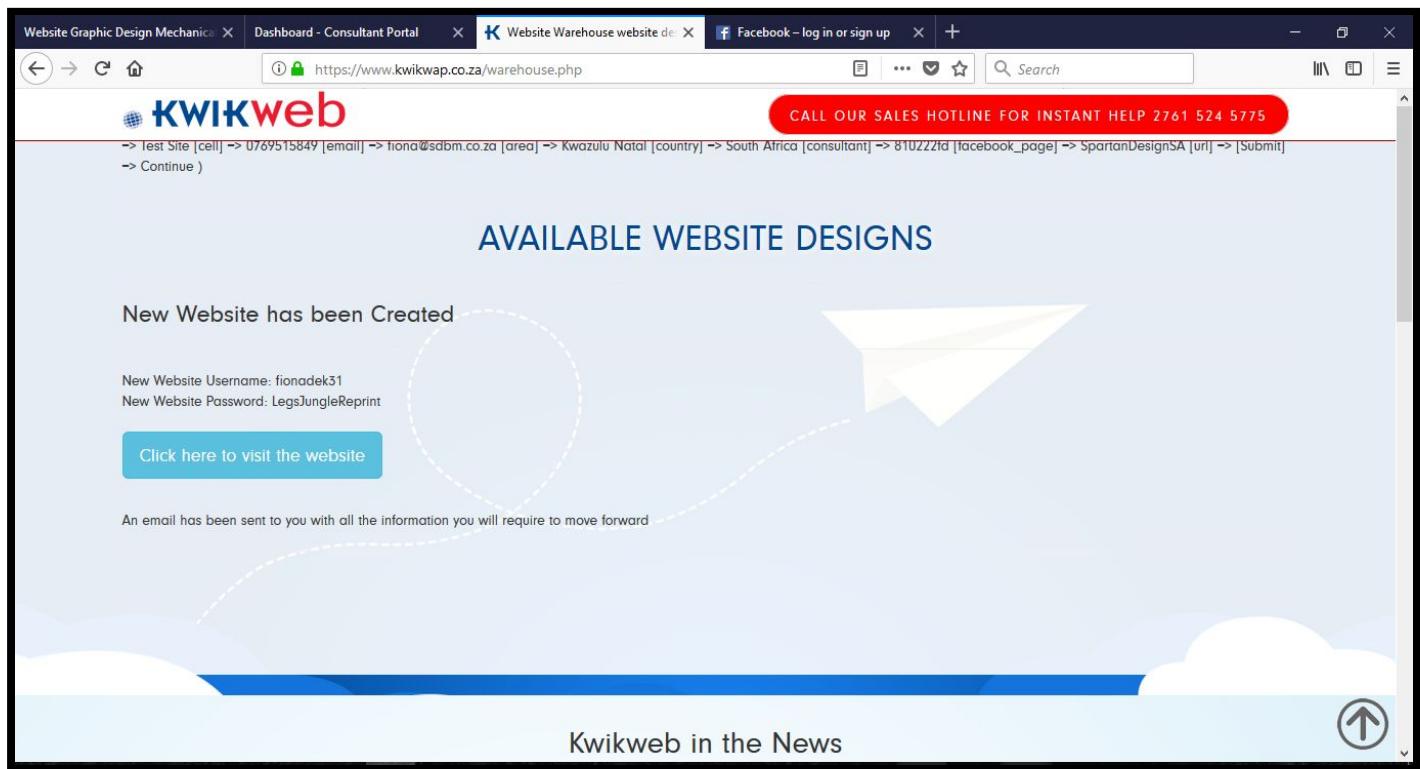


Figure 13: New Website has been created

To customize the website, you need to log out of your "**Consultant Portal**" and go back to the Kwikwap home page to log into the **Client Portal** using the username and password created when you created the website. **Refer to Figure 13 & 14.**

Kwikweb Consultant Training Manual

NOTE: I have created a spreadsheet where I save all my client log in details so I can easily access it should they need assistance with anything, or if they have forgotten any of their details. You might choose only to save the copies of the emails you receive with the info on. Whatever works for you.

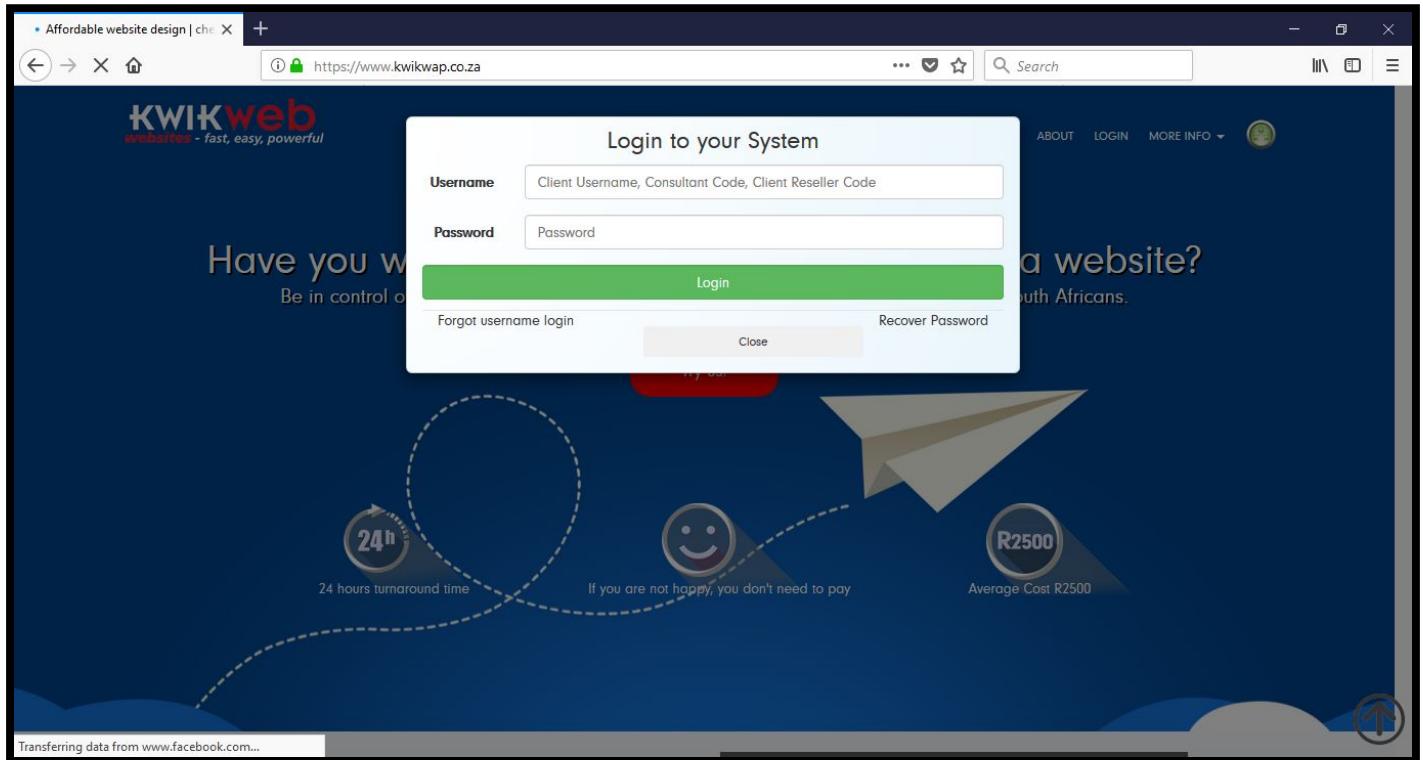


Figure 14: Log on page to edit / customise website

After you have entered the log on details, a security warning may be displayed, read the message and click on Continue to go on to the back end of the Client website.

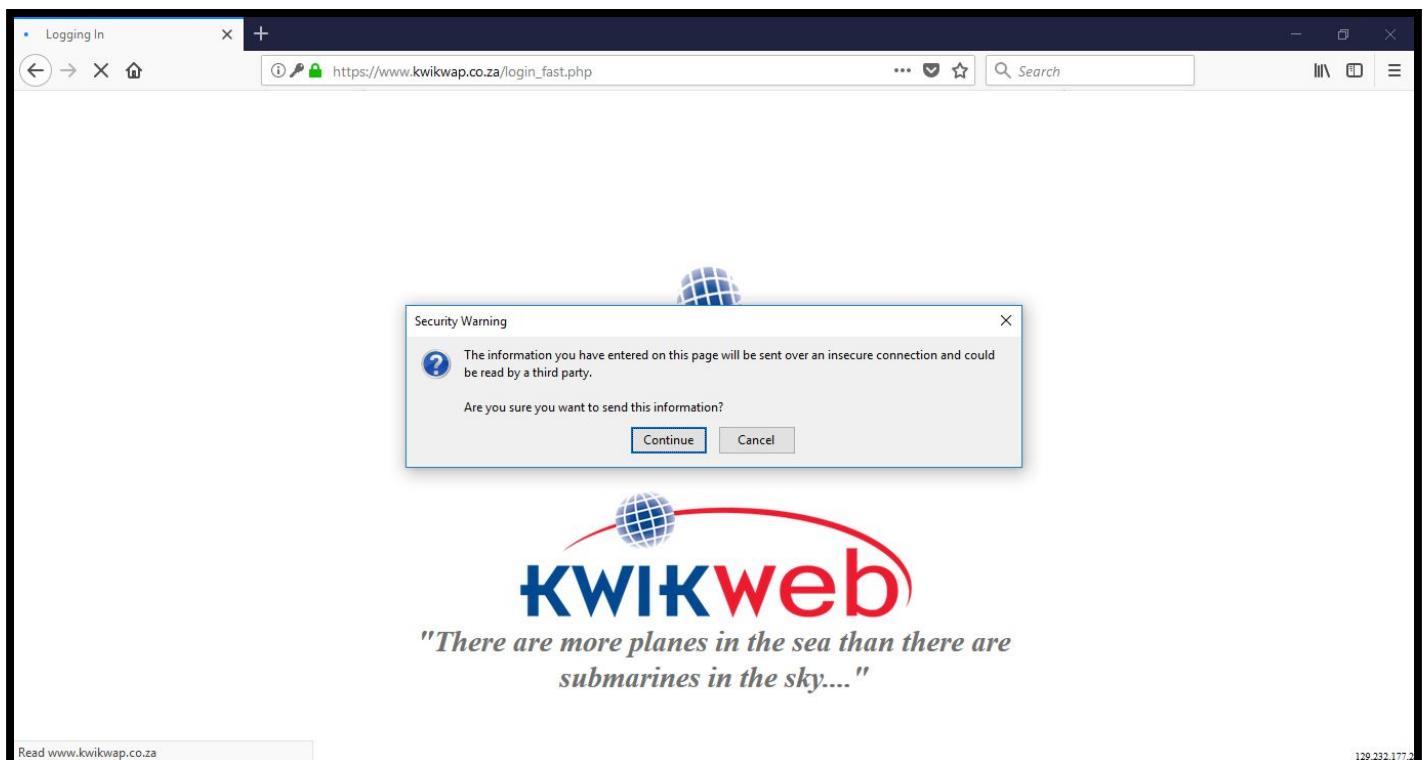


Figure 15: Security Warning

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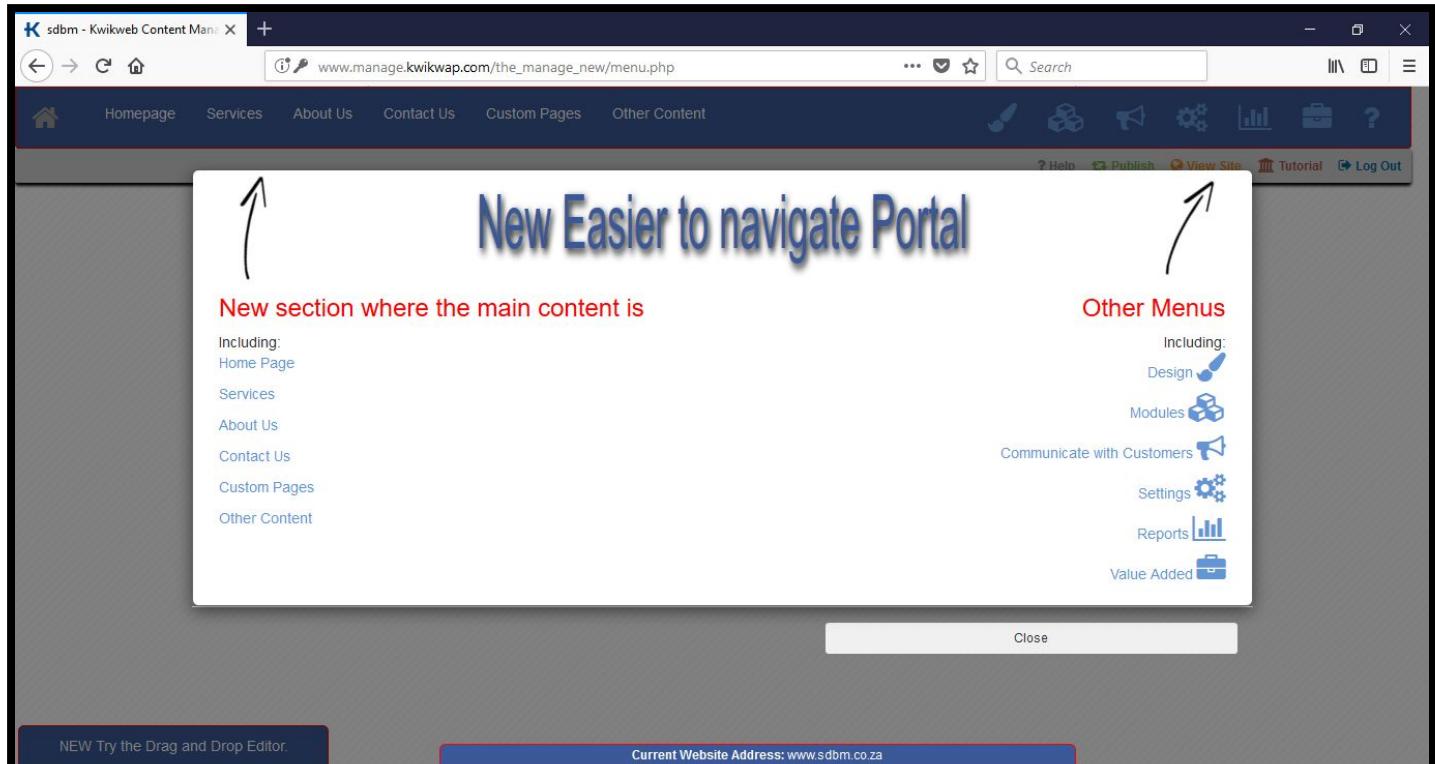


Figure 16: Pop up message

Once you have logged in, a pop-up message will be displayed. This message changes from time to time. Read it and then click on the left or right side of the pop-up message to close it.

Read through the **Headings** displayed on your screen. These Headings act like a Road map to indicate where you need to go to access specific sections.

On the left hand side of your screen, you have all the options available to edit the **Content** of your website. Click on each Heading to familiarise yourself with which options are available for each Heading. Please pay special attention to these Headings as you will need to know them well enough to be able to teach your Client how to update the Content to their website, once you have completed the design and added the Content for the site your client has provided.

Most of the Headings are straight forward. Under **Other Content**, you will find other modules that you might have added during the design such as FAQ's etc. Click on **Other Content** and open the other modules in these sections to see what editing options you've got for them.

On the Right hand side of your screen you will see 7 icons. If you hover over each icon with your mouse, you will see what each icon is for. The paint brush is for **Web Design**. If you click on the paint brush a dropdown list will appear with the options available for web design. Click on each item to view the options available to you. **See Figure 17 & 18.**

IMPORTANT NOTE:

Before replacing images on your website, please watch the 2 min YouTube video (there is a link at the Replace Design Images section) . You can only replace existing images, with images of the exact same size. You can access this video from the **Kwikweb YouTube channel** under the **Training** tab. **Also see section 2.7 Training and Figure 8.**

For ease of reference, I've added the link to the video below.

<https://www.youtube.com/watch?v=yIE6b5hX0c0>

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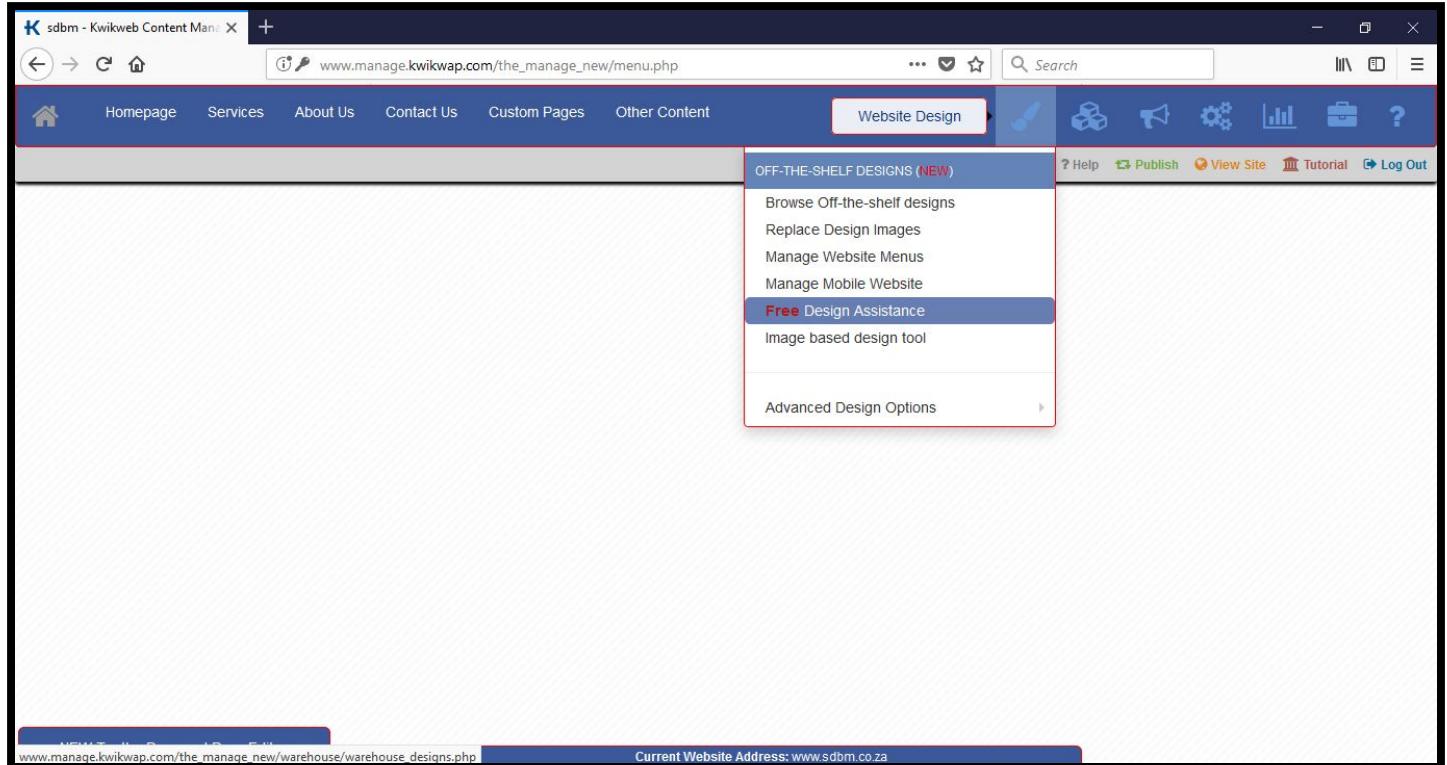


Figure 17: Options under Web Design

TIP: To familiarize yourself with the web design features before having to do a website for a client, create a test website and try each of the features under the **Web Design** tab to see what each feature does. Every time you make a change, click on **View Site** to see what the effect of the changes are on the website.

2.14 Sign Electronic Debit Order

Before you can register a new domain / website, the client needs to sign a copy of the **Client & Debit Order agreement** form. You will find the form under **Documents / General Documents / Client & Debit Order agreement**.

As part of the domain registration process, you need to input the details the client completed on the form. Once you submit the domain registration, both you and your client will receive an electronic copy of the **Client & Debit Order Agreement**.

Clicking on **Sign Electronic Debit Order** from the Consultant Portal, allows you to complete debit order forms from your consultant portal as well.

2.15 Add Consultant

If you want to recruit and add a new consultant, you can do so by clicking on **Add Consultant** on from the **Consultant Portal**. Complete the information completed by the new consultant on the **Agent & Debit Order Agreement** that you will find under **Documents / General Documents / Agent & Debit Order Agreement**.

2.16 Cancel Consultant Account

As the name says, this is where you will go to cancel a Consultant Account.

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3. Graphic Design

If you have Graphic Design software such as Adobe Illustrator, it can use it to offer additional services to your client such as Logo Design, Business Cards, Flyers etc. which you are able to charge your client an additional amount for. Adobe software however, is a package you would need to purchase from an Adobe certified reseller. You can also buy it online via the Adobe website, should you want to.

Buying this software is not a requirement at all. There are many free graphic design software packages available online, such as Crello or Canva. **Refer to Useful and Custom Links.**

4. Setting up of Client Emails & Email Help Website

If you need assistance on how to set up Email Accounts for a client, you can get all the information you would need, including trouble shooting from the email help website (www.emailhelp.co.za). You can also access the email help document from **Documents / Email Support Documents / Email Help Document** from the Consultant Portal.

5. Training to be provided to the Client once a website has been completed

As part of your requirements as a Consultant, you need to show / educate your clients on how to update the content of their website on your own. Answer their questions where you can and when you can't answer them, contact your trainer or technical@kwikwap.co.za to get the information for them as soon as possible. Communication is very important as this is how you will build a relationship with your clients. No one wants to have to sit around waiting for someone to eventually get back to them. You will find if you offer your clients good service, they will refer you to other people. **Word of mouth** could be a powerful tool.

6. Other Useful Information

6.1 Kwikweb Consultants Group in Facebook

Be sure to join the closed Facebook group where regular Live training sessions are presented.

<https://www.facebook.com/groups/kwikagents/>. You can also post any questions there and they are usually quickly answered.

6.2 Selecting Colours for Websites

Selecting the correct colours for a website is very important. Not everyone sees colour the same way. People that are colour blind, for example, can't see the colours red and green next to each other. They can also not distinguish between colours such as pink and orange, purple and blue etc.

See Figure 18. The colour wheel shows you which colours are complementary and work well together. The colours can be used in addition with white and black.

Keep this Colour wheel in mind when discussing colour selections for the website with your client. Sometime the best ideas for colour selections come from nature. Simply looking out the window will give you a great idea of which colours work well together.

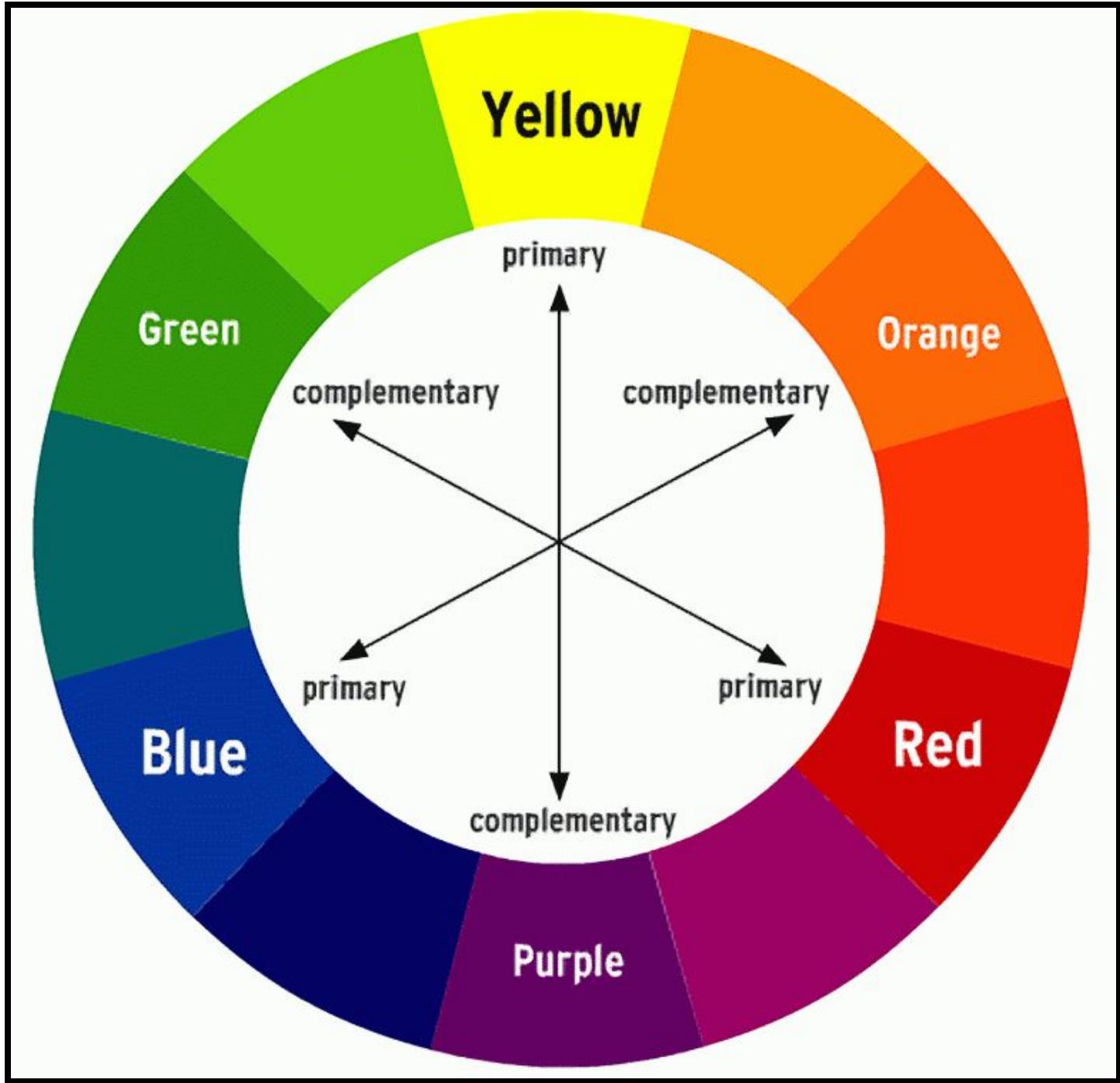


Figure 18: Colour wheel

7. Questions

If you have any questions that I did not cover in this document, please don't hesitate to contact your recruiter or the Kwikweb Head Office at 021-0720303 or info@kwikweb.co.za

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