



DO YOU WANT TO KNOW WHO IS
LOOKING AT YOUR WEBSITE?

Lets Get Started



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INVITING USERS



For some businesses, it might be more efficient to nominate one individual to control the management of the visitor table, applying tags and distributing the leads.

It will depend on your own business working structure and the follow-up process which you decide to implement.



DASHBOARD OVERVIEW

New/Returning Visitor Graph

Your Dashboard shows you a brief overview of your website visitors with a few alternative angles and concise data visuals.

Companies by Search Term

Returning Visits



Recent Visits

Company
Business Identifed 01
Business Identifed 02

Companies by Search Term

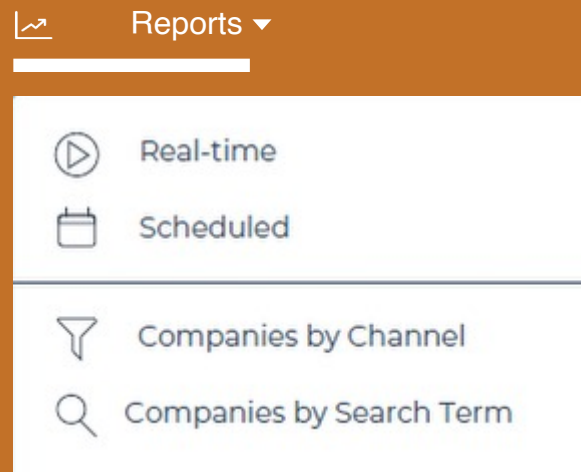
Name
Search Term 01
Search Term 02



REPORTS

The dashboard provides you with 4 main styles of reporting options:

- Real time notifications
- Custom CSV email
- Companies by Channel Report
- Companies by Search Term Report



Real time notifications

Your Real-Time Notifications deliver instant alerts of new companies visiting your website.

They are automatically set up to be received by the first user on the account. However, to set up a Real-Time Notification for an alternative user, simply select the '+ Add Recipient' icon and choose your user.

To help you exclude irrelevant notifications, you can select only the specific visiting country or countries you would like to receive these alerts for.

Scheduled reports

If live notifications are not required for a user, Scheduled Reports offer more flexibility and will send you an email of visiting companies at a time you choose, for a period you want, with all of the relevant data in a concise CSV file.

Companies by channel

This Report will group your identified companies by the referral source. You can select a date range in the top right corner to view activity over a chosen period of time.

This information can be downloaded used for Marketing Reports and Insights to various campaigns.

Companies by search term

Where possible, the dashboard will show you how many companies have been identified from specific search terms.

These SEO Insights can be viewed and exported to guide your Content Marketing and Search Engine Optimisation focus.

TRIGGERS

Trigger Reports help you to filter through the noise of your website visitors and create automation outside of the dashboard to deliver notification of the most important or pre-qualified companies.



CREATING A TRIGGER

To create a **Trigger Report** for a specific page, you will need to set it up as a Tracking Page which can be selected from the drop down menu..

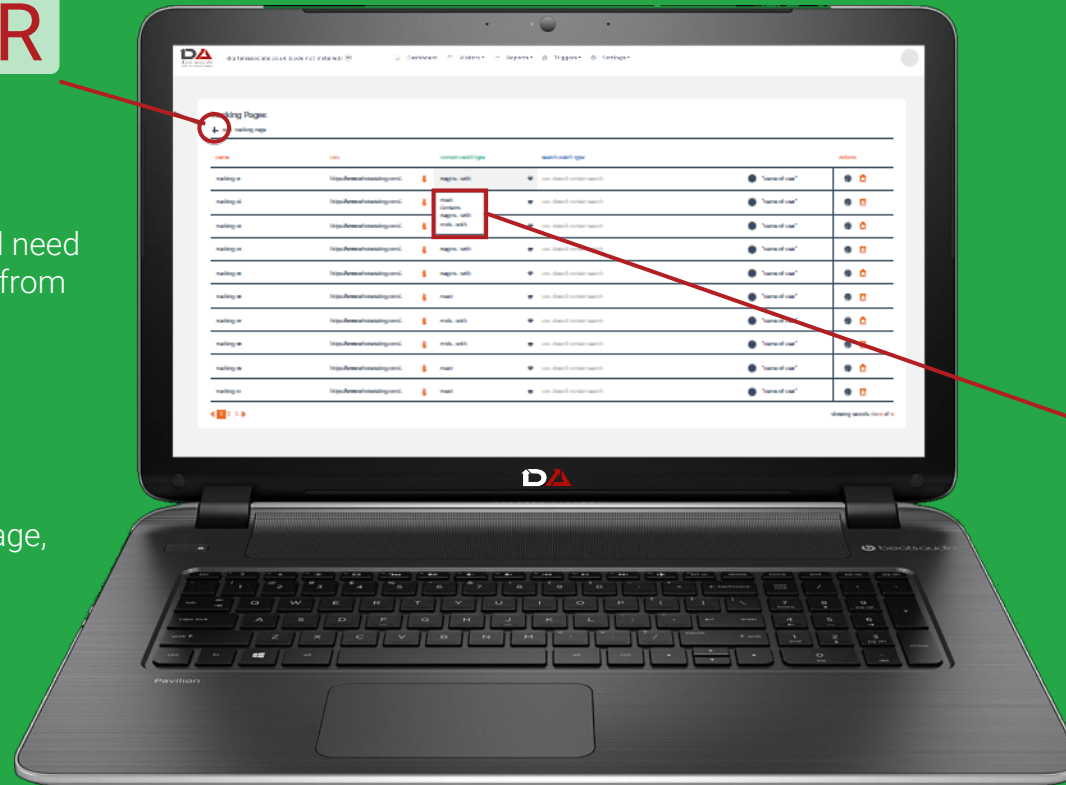
Tracking pages

URL - Once you have named the particular Tracking Page, enter the full URL of the website page you want to be notified of visitors landing on.

Domain match type

Depending on the complexity of your URL structure, select the condition which you want for tracking the page (or pages).

URL	Domain Match type	Search Match type
https://www.wholevoting.com/lead-page	Begins - With	URL doesn't contain search
https://www.wholevoting.com/lead-page	Ends - With	URL doesn't contain search
https://www.wholevoting.com/lead-page	Contains	URL doesn't contain search
https://www.wholevoting.com/lead-page	Exact	URL doesn't contain search



Exact
Contains
Begins - With
Ends - With

Begins - With - Enables you to track a range of pages which meet your criteria, grouping by the first variable in a URL's sub domain.

Ends -With - Enables you to track a range of pages, grouping by the final variable in a URL's sub domain.

Contains - Enables you to track a range of pages instead of just one, grouping by less-structured URL elements or key-terms in a URL.

Exact - Enables you to track the individual page matching the exact URL entered.

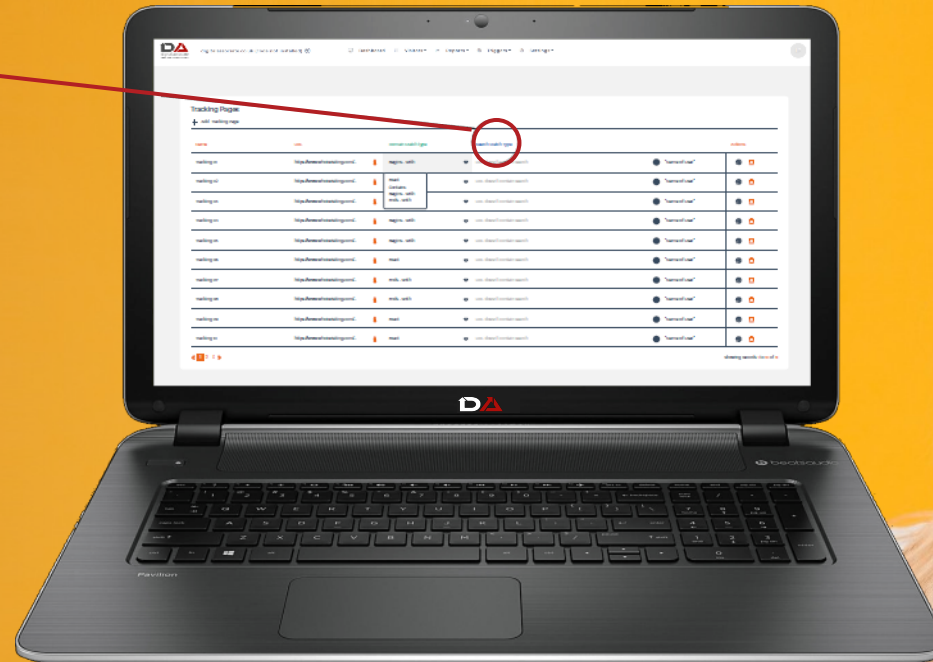
SEARCH MATCH TYPE

If you are tagging URLs with custom campaign variables to track your marketing activity, referrals or paid advertising campaigns, you need to set the Search Match Type condition.

Exact - This option will match the exact variables from your URL Parameters.

If you want to leave a variable as 'anything', you can set the chosen utm to = *.

Contains - The contains option allows you to track multiple pages from your campaigns which differentiate in certain variables but match one or some of the criteria (ie source=social).



URL	Search Match Type
<code>?id=1&utm_campaign=c1</code>	<code>contains ?id=*</code>
<code>?id=1&utm_campaign=c1</code>	<code>contains ?id=1</code>
<code>?id=1&utm_campaign=c1</code>	<code>contains ?utm_campaign=c1</code>
<code>?id=1&utm_campaign=c1</code>	<code>exact ?id=1&utm_campaign=c1</code>



CATEGORIES

Categories are tags which you can set to companies to help you manage and organise your visitors for a clean dashboard appearance and multiple actions.

Organisation, Appearance, Filtering, Trigger Variables

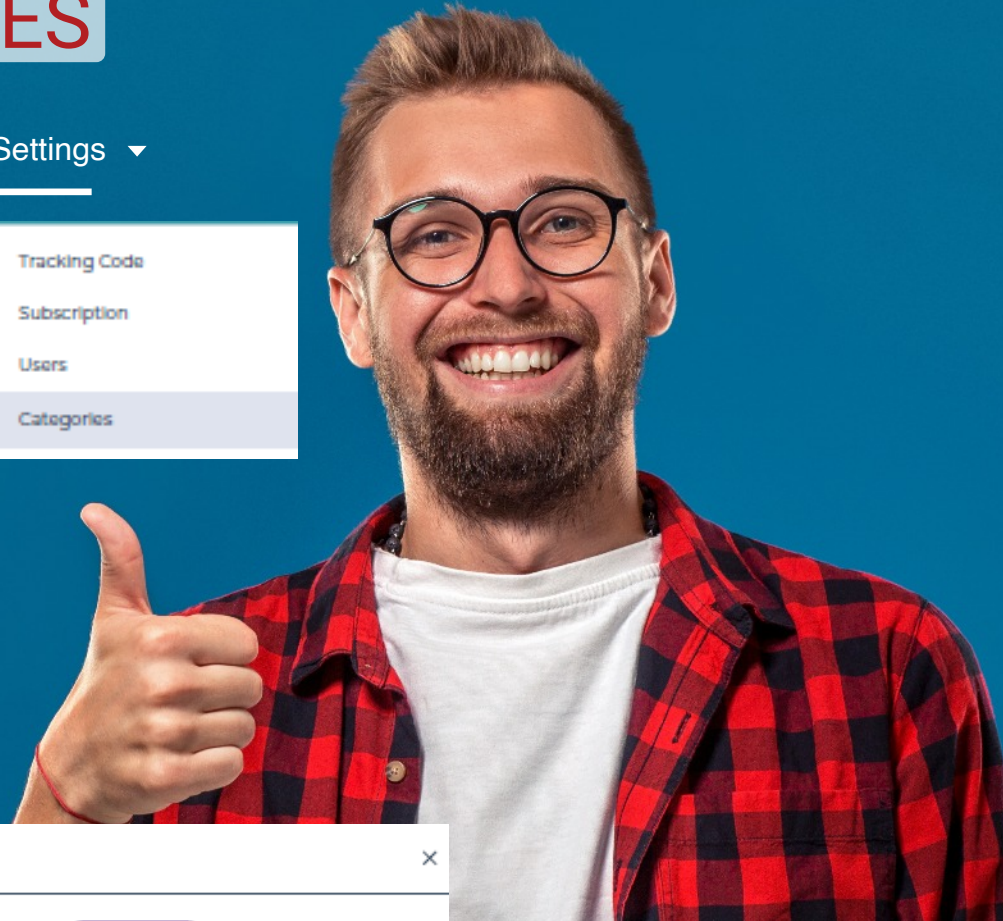
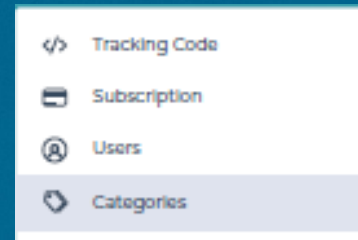


ADDING CATEGORIES

Your 'Categories Hub' is located within the Settings drop down of your Dashboard. This is where all of your Categories can be created, managed and amended.

Once you have decided on a purpose for your Category, select to + Add New.

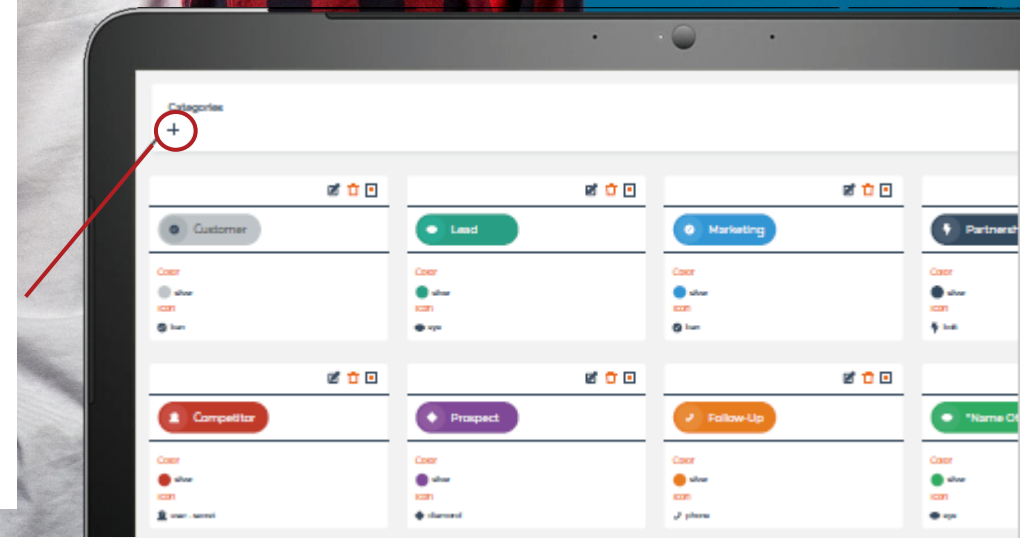
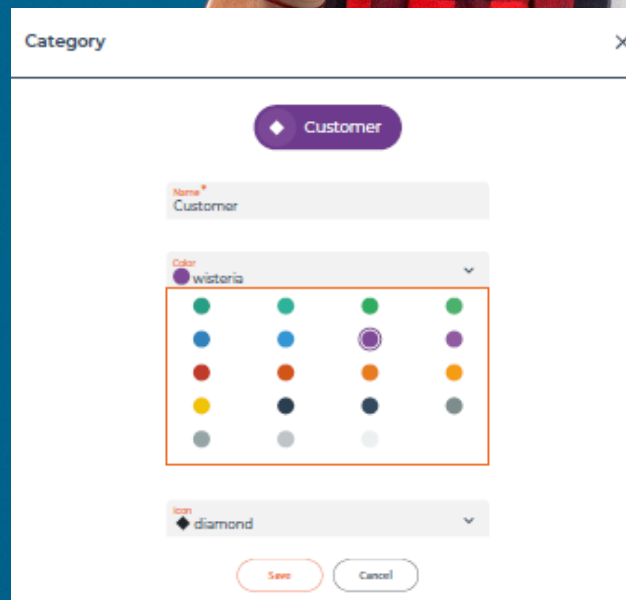
Settings ▾



Create a name for the new Category which will appear in the Dashboard Tag.

Customise your Category appearance by Colour and Icon to add unique identity and familiarity in the Visitor Table.

Finally set your category from the Visitor Page or Company Visitor Details section.



VISITOR TABLE

From your Visitor Table, you are able to visualise all of your visiting companies over a selected date period with various Data Points.

It Is Your Very Own Business Lead Inbox



VISITOR TOOLBAR

Apply Advanced Filter Options from the Visitor Toolbar to present your data appropriately for a concise overview of your leads, opportunities, customers and competitors.

Note - ISP's automatically hidden until you select otherwise.

User assignment

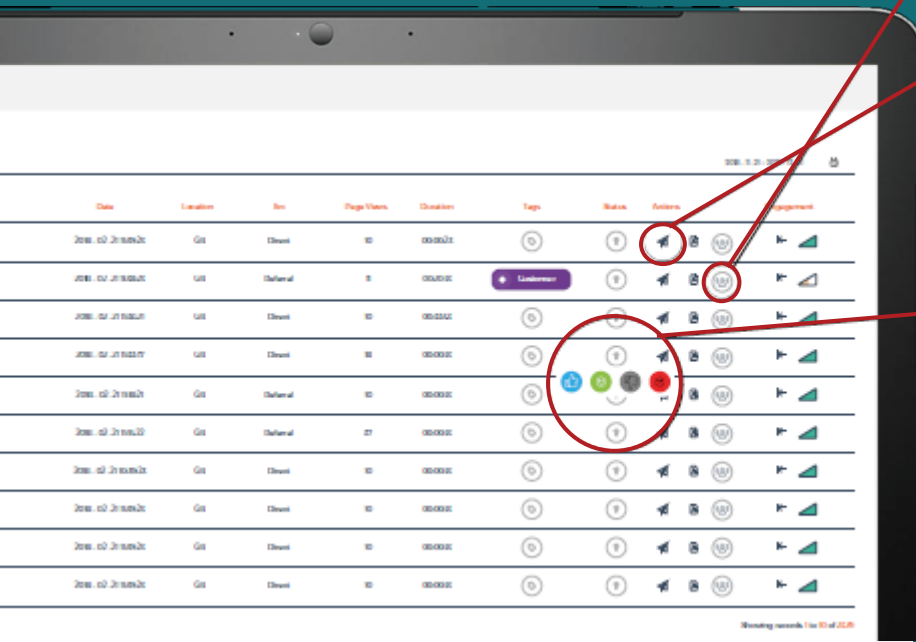
You can assign yourself, or any user, to a specific company in the visitor table. This allows the option to filter by user, manage and clearly overview your own Leads and follow-up opportunities.

Send lead

Within 'Actions' you will find our new 'Send Lead' feature. This packages all of the important contact information from a specific company visit and allows you to instantly deliver a Lead Alert Email to the most appropriate person in your organisation to take action.

Deal status

Seamlessly apply a 'Deal Status' to your website visitors to keep all users well-informed of the ongoing situation and communicate clearly the impact of your follow-up.



Date	Location	Site	Page Views	Duration	Tags	Status	Actions	Assignment
2025-02-20 10:00:00	Get	Direct	10	00:00:01				
2025-02-20 10:00:00	Get	Referral	10	00:00:01	Customer			
2025-02-20 10:00:00	Get	Direct	10	00:00:01				
2025-02-20 10:00:00	Get	Direct	10	00:00:01				
2025-02-20 10:00:00	Get	Referral	10	00:00:01				
2025-02-20 10:00:00	Get	Referral	10	00:00:01				
2025-02-20 10:00:00	Get	Direct	10	00:00:01				
2025-02-20 10:00:00	Get	Direct	10	00:00:01				
2025-02-20 10:00:00	Get	Direct	10	00:00:01				
2025-02-20 10:00:00	Get	Direct	10	00:00:01				

CHECKLISTS

There are four main components of the dashboard and overall process.



1. Data collection

The quality and relevance of the data which the dashboard captures is influenced by the marketing activity which you are implementing to drive traffic to your website through the following channels:

Paid Advertising, Content Marketing, Search Engine Optimisation, Email Marketing, Social Media Marketing, Referral Marketing, Events Marketing, Public Relations Activity, Telemarketing

2. Dashboard organisation

Optimising your dashboard to ensure that it is compliant with the way your business operates.

Inviting New Users, Assigning Users, Setting Categories (tags), Deal Status, Filtering Your Visitor Table

3. Reporting configuration

Allowing the data which you collect to filter into the most appropriate direction in an automated way.

Reports, Triggers

4. Follow up strategy

These are some of the ways which you can re-engage website visitors who have displayed an interest in your product or service but have yet to convert.

Email outreach, Phone call, Social media, Direct mail, Retargeting

