

Using controlPANEL

A complete guide to the website admin area

Log in to controlPANEL

Administration

contactMANAGER

System e-mails

Online Directory

Reports & Statistics

FAQ's







Tel: 0800 181 343

Email: support@practicetrackonline.co.uk

www.practicetrackonline.co.uk

Content

<https://my-controlpanel.co.uk>

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Login to controlPANEL

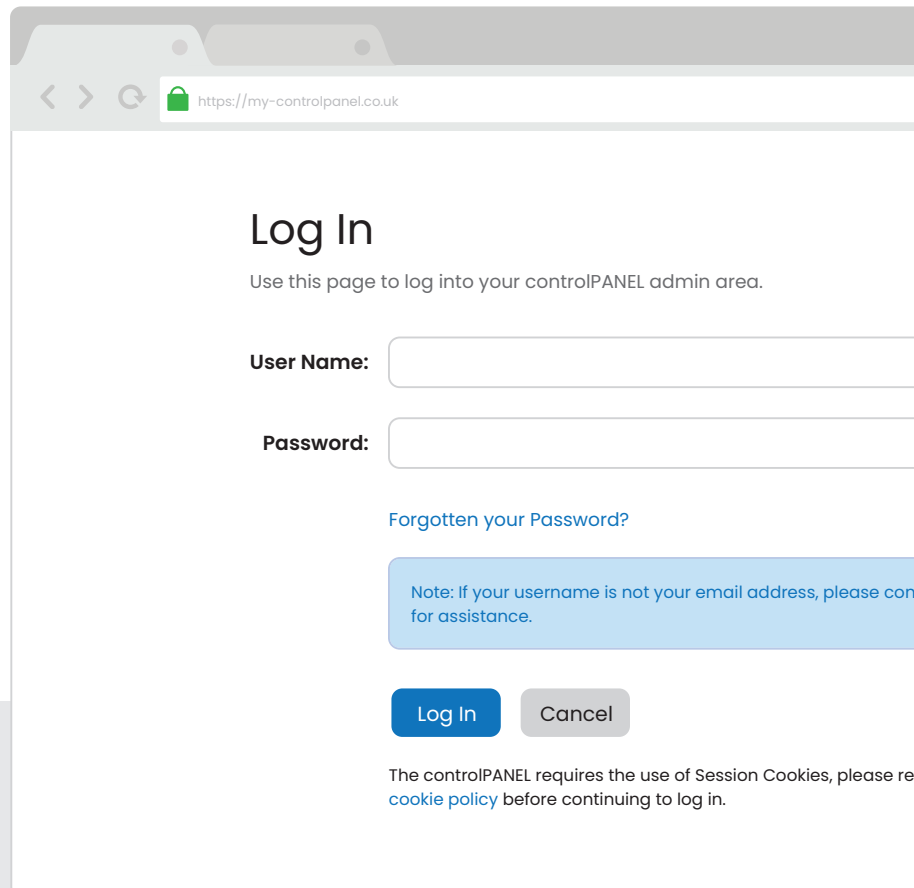
<https://my-controlpanel.co.uk>

The two easy ways to access the login page for controlPANEL:

1 Via direct link
<https://my-controlpanel.co.uk>

2 Via the PracticeTrackOnline site
<https://www.practicetrackonline.co.uk>

Client login

A screenshot of a web browser displaying the login page for controlPANEL. The browser's address bar shows the URL 'https://my-controlpanel.co.uk'. The page has a white background with a grey header. The main heading is 'Log In' in a large, bold, black font. Below it, a subtitle reads 'Use this page to log into your controlPANEL admin area.' There are two input fields: 'User Name:' and 'Password:', both with light grey borders. Below the password field is a link that says 'Forgotten your Password?'. A light blue box contains a note: 'Note: If your username is not your email address, please contact support for assistance.' At the bottom of the form are two buttons: a blue 'Log In' button and a grey 'Cancel' button. A footer note states: 'The controlPANEL requires the use of Session Cookies, please read our [cookie policy](#) before continuing to log in.'

A username and password were supplied by email advising you that '**YOUR SITE IS NOW LIVE**'.

If you have not received these login details please email support@practicetrackonline.co.uk and we will supply an email address and one-time password.

We don't store the password for security reasons, so if you have your **username** but not a **password** then simply click on the '**Forgotten your Password**' link to reset it.

Administration

<https://my-controlpanel.co.uk>

Content News

The first item in the administration tab is a simple list of the dates on which the content that we supply has been updated on your site.

Also listed are the dates of the mailers that have been sent such as the latest monthly newswire. Selecting a title on the left will give you further details in the right-hand box.

Go to My Website

Exactly as suggested, this is a quick link to your website.

Simply click the link to open up the site in a new browser window.

Your Contact Details

This is where you need to update the contact details of the best people that we can contact for admin, marketing or billing queries etc.

On the Address tab your current address is required. These are for our records and won't update anything on your website.

Online Forms Submitted

This area stores any data that has been entered into your website forms as a back-up for the original email that is sent.

Please email us to see if it is possible to set this up for any forms on your site.

Change your Password

We recommend changing your password regularly to help increase security and lower the risk of someone else logging in to your account.

You should always try and use a different password across any online accounts you have and sites that you use that require a registration or sign up, rather than using the same password for all.

Administration

Go to My Website

Your Account Details

Online Forms Submitted

controlPANEL Users

GDPR Policy

Change your Password

Log Off

contactMANAGER

<https://my-controlpanel.co.uk>

Your Contacts

For quick access to all of your contacts.

Once this list is showing, you can reorder it by clicking on the headers: **Created On, Name, Business, e-mail or Method**. This list only shows your subscribed contacts who receive mailings. Tick the box at the bottom of the page to include unsubscribed contacts in the list.

Edit Contact

You can click on an individual contact to see which emails they receive, in the **Subscription** tab.

The **History** tab shows the emails that a contact has received.

And the final tab shows the contact lists that they are included on.

If you change any of these details click the **'Update contact'** button to save the changes.

Update Contact

Contacts who unsubscribe

If a contact has unsubscribed themselves, then you can't re-subscribe them.

They can unsubscribe using the link in the emails sent to them from your account or you can unsubscribe them in the subscription tab.

Unsubscribe

Contact Lists

This section is only relevant if you have purchased **Mailshot manager** for your account. It is an area to create, edit and store groups of contacts for emails.

contactMANAGER

Upload Contacts

Your Contacts

Contact Lists

Tools

The screenshot shows a web browser window with the URL <https://my-controlpanel.co.uk>. The page displays the 'Details' tab for a contact. The contact was created on Thursday, 04 Oct 2007 at 16:47 and was created by 'Registered via your website'. The 'First/Last Name' field is split into two input boxes. The 'email Address' field has an '@' symbol in a dropdown menu. Below these are 'Optional Fields' including 'Business Name', 'Address' (with three input boxes), 'County', and 'Postcode'. At the bottom, there are three buttons: '< Back', 'Update Contact >', and 'Unsubscribe >'.

Details	Subscription	History	Contact Lists
Created on: Thursday, 04 Oct 2007 at 16:47			
Created by: Registered via your website			
First/Last Name: <input type="text"/> <input type="text"/>			
email Address: @ <input type="text"/>			
Optional Fields			
Business Name: <input type="text"/>			
Address: <input type="text"/> <input type="text"/> <input type="text"/>			
County: <input type="text"/>			
Postcode: <input type="text"/>			

< Back Update Contact > Unsubscribe >

Contact Tools

<https://my-controlpanel.co.uk>

Tools

The main area for contact management.

The **search** function allows you to locate individual email addresses, contact names or groups - for example all of the emails that are within your company.

Summary shows you the number of subscribed contacts that you have, click on the blue description on the left to view the list of contacts for each summarised group. This can then be exported to Excel, deleted or copied to a contact list for use for specific **Mailshot Manager** mailings.

You must select the contacts first before deleting them, but clicking export will send the entire list to an Excel spreadsheet.

contactMANAGER

Upload Contacts

Your Contacts

Contact Lists

Tools

Export

Delete Contacts

Copy to Contact List

Contact Management

Contacts who unsubscribe

The **Mass Delete** tab will completely remove multiple contacts, just using their email address.

The **Housekeeping** tab is where you can **Delete ALL** or **All Unsubscribed**.

If you are nearing your contact allowance and would like to increase the amount then email us for further details.

GDPR Warning

Please be advised that we do not accept purchased lists due to spamming regulations and GDPR.

The screenshot shows a web browser window with the URL <https://my-controlpanel.co.uk>. The page title is "contactMANAGER allows you to manage all of your contacts for all your available online services." The interface has a navigation bar with tabs: Search, Summary, Import, Mass Delete, and Housekeeping. The "Search" tab is active. Below the tabs, there is a text input field for searching by contact name or email address, with a hint: "Enter part of a contact name or email address below to search. If you enter 3 or more characters". To the right of the input field is a list of radio buttons for filtering contacts: "Show all Contacts (130)", "Show Subscribed Contacts (108)", "Show unsubscribed Contacts (22)", "Show contacts Uploaded", "Show contacts Registered via Website", "Created between the following dates (inclusive)", "Names that match the following", and "Emails that match the following". The "Emails that match the following" option is selected. Below the list is a "Search for:" label and a text input field. To the right of the input field is a "Search »" button. At the bottom of the search section is a link "Hide Advanced options".

Adding Contacts

<https://my-controlpanel.co.uk>

The three ways to add contacts within contactMANAGER:

1. Click 'Your Contacts' in the left menu



Scroll to the bottom of the page and click the **Next** button



Add the name and email address details

Choose the mailers they wish to receive.

Add to any contact lists for 'Other Company Mailings' from **Mailshot manager**



Individually

2. Contacts can also register themselves via your website

You can include a call to action such as – 'Click here to subscribe to our monthly newsletter'

A screenshot of the 'Import' tab in the contactMANAGER interface. It shows a search bar, tabs for Search, Summary, Import (selected), Mass Delete, and Housekeeping. Below the tabs, a message states: 'To import your contacts into your contactMANAGER, use the Browse button below to find your Excel spreadsheet. You can upload a maximum of 892 contacts.' There is a text input field labeled 'Excel File to Import:' with a 'Browse...' button to its right. Below the input field is an 'Import Contacts »' button. At the bottom, there is a link: 'Need help creating your Excel file?'.

3. Click 'ContactMANAGER' and then 'Upload Contacts'.



Upload the Excel file from your files.

You can download a sample from within the link 'Need help creating your Excel file?'

The minimum requirements for each contact to upload successfully are:

First_Name and a valid **Email**

Mass Upload

Subscriptions

<https://my-controlpanel.co.uk>

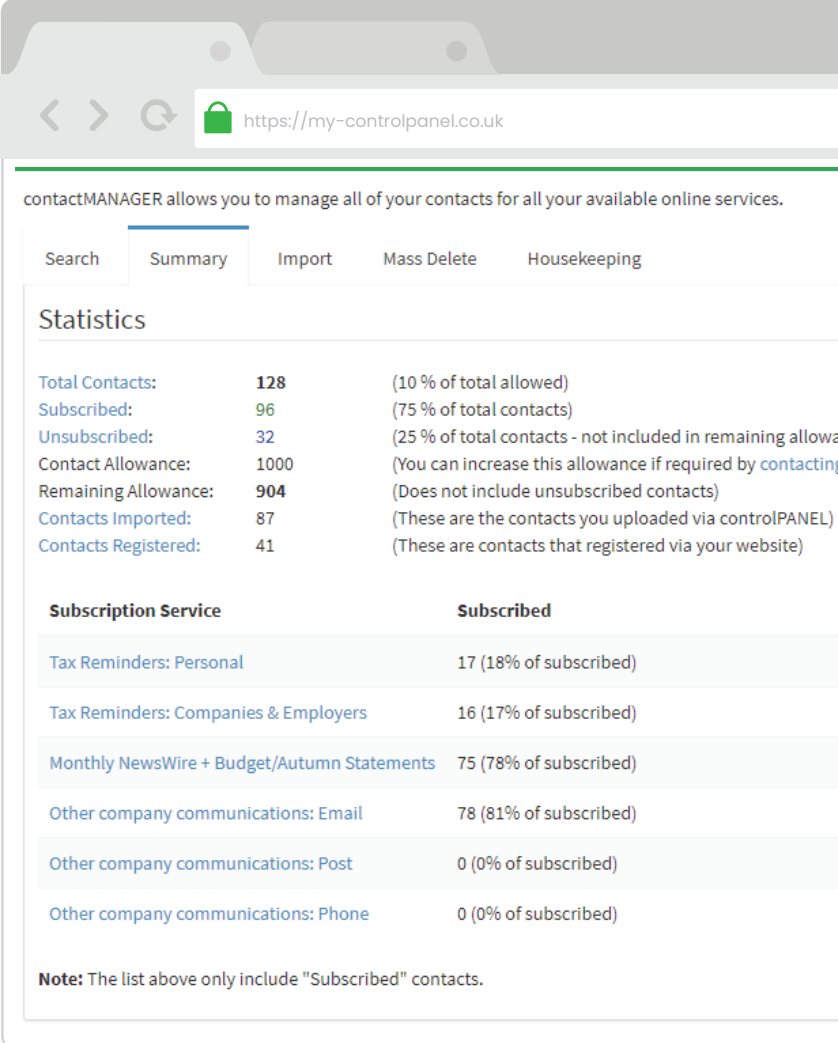
Within the Contact Tools section you can access and export your lists of contacts who are subscribed to each mailing type.

Click on the links to view the lists and remove contacts by updating their subscriptions.

Here you can also see who has registered via your website.

Or you can update their subscription details and even remove them completely from your **contactMANAGER**. Search for individual contacts by name or email using the Search tab.

Contacts can unsubscribe themselves by clicking on the unsubscribe links in any emails they receive from your website.



The screenshot shows a web browser window with the URL <https://my-controlpanel.co.uk>. The page title is "contactMANAGER allows you to manage all of your contacts for all your available online services." Below the title is a navigation bar with tabs: Search, Summary (selected), Import, Mass Delete, and Housekeeping. The main content area is titled "Statistics" and displays the following data:

Total Contacts:	128	(10 % of total allowed)
Subscribed:	96	(75 % of total contacts)
Unsubscribed:	32	(25 % of total contacts - not included in remaining allowance)
Contact Allowance:	1000	(You can increase this allowance if required by contacting support)
Remaining Allowance:	904	(Does not include unsubscribed contacts)
Contacts Imported:	87	(These are the contacts you uploaded via controlPANEL)
Contacts Registered:	41	(These are contacts that registered via your website)

Subscription Service	Subscribed
Tax Reminders: Personal	17 (18% of subscribed)
Tax Reminders: Companies & Employers	16 (17% of subscribed)
Monthly NewsWire + Budget/Autumn Statements	75 (78% of subscribed)
Other company communications: Email	78 (81% of subscribed)
Other company communications: Post	0 (0% of subscribed)
Other company communications: Phone	0 (0% of subscribed)

Note: The list above only include "Subscribed" contacts.

GDPR

<https://my-controlpanel.co.uk>

Since the General Data Protection Regulations began in May 2018, you are regarded as the controller of your contact data and we are the processor.

GDPR Summary

Any new contacts added to **contactMANAGER** to receive emails need to have given you their permission, or fall into the legitimate interest category.

If you add the contacts individually, you need to tick the box to confirm that you have a legitimate reason to send them emails, to comply with the GDPR legislation.

If new contacts register themselves via your website, then they comply with GDPR by a double opt-in while signing themselves up to receive emails from you.



You can find more details about how GDPR affects your website and emails on your **controlPANEL** homepage, or if you have any questions send us an email.

System Emails

<https://my-controlpanel.co.uk>



NewsWire


Sent in the first week of every month. It contains topical articles that link to the News section of your site.

Account Design Template



The content from each email we send is merged into your account template and appears to come from you.


Please ensure this has your up-to-date logo and details.

 System emails 

 Account Design Template

 email Templates

 NewsWires 

 NewsWire History

Email Templates

Here you can view and edit the content that is sent for each different type of automated mailer, such as the monthly NewsWires, Tax reminders, subscription confirmations etc.

Listed as 'templates' you can click on the [edit] link on each to see what is currently being sent.

If there isn't an [edit] button for a specific template it may mean that it can't be changed, please send us an email to see if it's possible.

NewsWire History

View your previous mailers sent, either by sending yourself an email sample or view it straight away in a pop-up window.

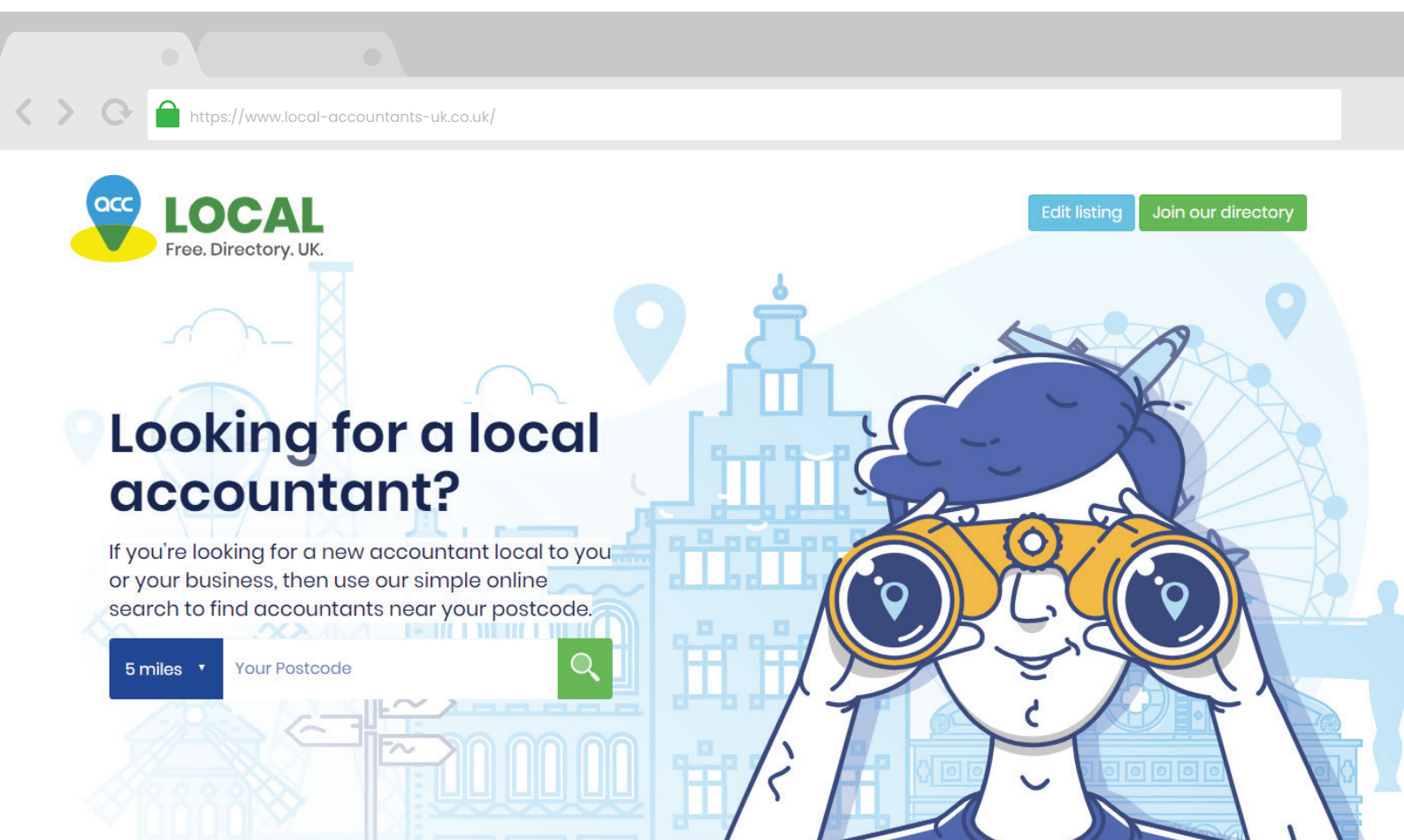
The **No. Sent** refers to how many of your contacts were subscribed at the time the mailer was sent and therefore how many received it.



Online Directory

<https://www.local-accountants-uk.co.uk>

Update your details in this section to help boost your website's Search Engine Optimisation and also appear on **accLOCAL**, our national directory of accountants
www.local-accountants-uk.co.uk



The accLOCAL directory lists local accountants all over the UK.

You should have automatically been added to the directory once your new website was set live.

If you don't think you've been added but would like to be included on the directory
please just email support and we'll set this up for you.

Reports & Statistics

<https://my-controlpanel.co.uk>

SEO Reports

We will help develop a suitable SEO strategy for your firm. This will focus around your key services and location(s) to ensure that your site is visible in the relevant searches.

Each month our SEO team prepare a comprehensive report and analysis of your key phrases and performance.

Statistics – show a generalised positioning for your search results.

Analysis – breaks down each keyphrase in to its current positioning in search results along with how it has changed in position.

webSTATS

A detailed breakdown of your website hits. Every visitor on your site is recorded here and analysed in many ways including pages most visited, downloaded and duration of the visit.

These are monthly reports, you can change which month to view using the dropdown box at the top.

Unsubscriptions

View an analysis of the contacts who have unsubscribed themselves from your contactMANAGER.

This shows the number of contacts who have unsubscribed and when they have done so.

To see the details of which contacts have unsubscribed, click on **contactMANAGER > Tools > Show unsubscribed Contacts**

Contacts can unsubscribe using the link in any mailer that they have received, such as the eNEWS.

Registrations

This report shows you the number of people who have registered for your mailers, via your website and the dates that they have done so.

For further details about these contacts, you can view the full list in your **contactMANAGER > Tools**

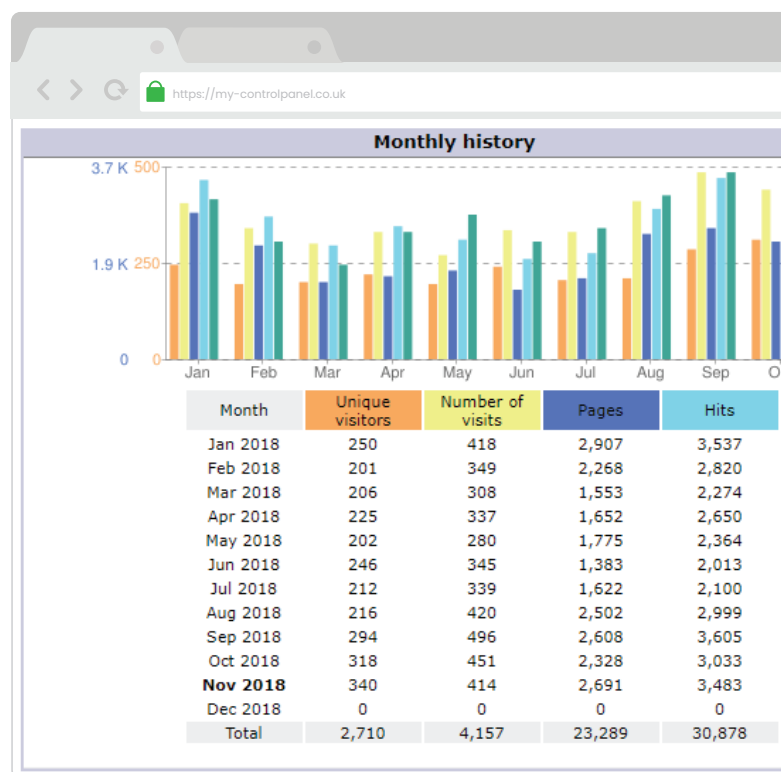
Reports & Statistics

webSTATS (website hits)

Unsubscriptions

Registrations

NewsWire Deliveries



NewsWire Deliveries

This is a list of the dates that your monthly newswire mailers have been sent and the amount of contacts that it was sent to.

You can also view the mailer that was sent for each of the previous 12 months.

FAQs

<https://my-controlpanel.co.uk>

Why won't my login details work?

Make sure that you are typing your details in and not copying and pasting.

Try the reset link on the login page if your password isn't working and failing that email the team to check that you are using the correct username (email).

How do I change my password?

Click on the forgotten password link on the login page.

Or if you just wish to update your password click on **Administration > Change your password** when logged in to controlPANEL

Who do I contact about invoicing and billing queries?

Simply email our accounts team at accounts@mercia-group.co.uk or phone 0116 258 1242 and ask for the accounts department.

Can I send my own emails to my contacts?

You can add **Mailshot manager** to your website package, which allows you to create and send your own emails to all, or groups within, your **contactMANAGER**.

When do the Newswires get sent?

They are sent to all subscribed contacts in the first week of each month.

Can I change my SEO keyphrases?

Yes if you need any help with SEO email us and we can get our SEO team to help. We generally offer **5 keyphrases** as part of your package but it is possible to purchase more.

Why are my contacts showing old dates when I just added them?

If a contact has previously been deleted from your **contactMANAGER**, their data isn't stored but a unique key will remember the data if you re-add them, to prevent you from subscribing contacts who have previously unsubscribed themselves.

Can I send a Christmas eCARD to all of my contacts?

We offer free Christmas ecards every year.

You simply have to set up your order in November in your **controlPANEL**. You can make an optional charity donation at the same time.

Tel: 0800 181 343

Email: info@practicetrackonline.co.uk

www.practicetrackonline.co.uk

