

Guide for the website and marketing officer

Guides by job role

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

Guides by job role

Guide for the website and marketing officer

Publish pages and posts, run campaigns, collect enquiries and report what brings customers in.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Your role

You bring in interest and make sure the sales team follows it up.

Website

1. Update pages and publish blog posts. See Web pages and the blog.
2. Fill in the meta title and description for each, so search engines show them well.
3. Do not publish prices, customer names or other private information.

Enquiry forms

- Keep your web forms short. See Web forms.
- Test them every month, and check the enquiry appears as a **Lead**.
- Make sure sales answers each enquiry fast.

Campaigns

1. Create a **Campaign** for each activity, such as a radio advert or a social media post. See Campaigns and appointments.
2. Tag every lead with the campaign and the source.
3. Send newsletters only to people who agreed to get them. Include a way to unsubscribe.

Report to the owner

- Leads and orders per campaign, from the **Campaign Efficiency** and **Lead Source** reports.
- Which sources convert best. See Sales pipeline and CRM reports.
- Spend against results, with the accountant.

Good habits

- Follow data protection rules. Keep proof of consent.
- Agree with sales who follows up leads, and how fast.

Who to ask

The sales manager about leads and the administrator about website settings.

Related documentation

- Web pages and the blog
- Web forms
- Campaigns and appointments
- Sales pipeline and CRM reports