

SEOPlan.com Customer Handbook

A step-by-step guide to account setup, website context, audits, monitoring, Google evidence, AI analysis, market research, Action Plans, teams, billing, and API access.

Online guide	seoplan.com/help-center/
Dashboard	seoplan.com/account/
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Evidence helps decisions; it does not guarantee indexing, rankings, traffic, or business outcomes.

How to use this handbook

Start with the Quick Start checklist. Then use the numbered sections when a dashboard panel or result is unfamiliar. The live Help Center remains the best place to search for updated instructions.

Quick Start

- 1

Create and verify the account.
- 2

Add the first website and choose it in the dashboard selector.
- 3

Run a private audit to create technical evidence.
- 4

Connect the matching Search Console and GA4 properties.
- 5

Configure monitoring and alert preferences.
- 6

Generate AI and market intelligence only after verifying the selected website.
- 7

Move useful findings into the Action Plan and assign an owner.
- 8

Review the Weekly Brief and measured impact regularly.

Three rules for reliable use

1	Choose context first	Verify the selected website before interpreting detailed evidence or generating a paid report.
2	Separate evidence from certainty	Treat scores, AI analysis, and market estimates as decision support rather than guaranteed outcomes.
3	Turn findings into owned work	Use the Action Plan to assign, complete, and later review important recommendations.

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01	Account access	Create, verify, sign in, and recover your customer account.
02	Dashboard and website context	Make sure every detailed panel belongs to the website you intend to review.
03	Plans and paid access	Understand what Free, Foundation, Growth, and Scale unlock.
04	Websites	Add, label, select, and remove domains from the workspace.
05	SEO audit reports	Run a private audit, interpret results, export evidence, and delete reports.
06	Monitoring and alerts	Schedule recurring checks and understand changes, recoveries, and scan problems.
07	Google Search Console and GA4	Connect read-only Google evidence and assign the correct properties to each website.
08	AI SEO Analyst	Create an evidence-guided analysis for one selected website.
09	SEO Market Opportunity	Use DataForSEO evidence to compare demand, visibility, and competing domains.
10	Action Plan	Convert evidence into assigned work with status and later impact review.
11	Weekly SEO Brief	Use the weekly summary to choose the next work rather than merely collecting metrics.
12	Team access	Invite people with the minimum role required for their work.
13	Billing and subscriptions	Understand active, scheduled cancellation, past-due, upgrade, and downgrade states.
14	Customer API	Create, store, use, rotate, and revoke Scale read-only API keys.
15	Settings and company profile	Keep customer and organization information accurate.
16	Public tools	Use focused checks that do not require connected customer data.
17	Privacy and retention	Know what is retained and how to remove provider access or reports.
18	Common questions and troubleshooting	Use the narrowest recovery step and avoid repeating destructive or billable actions.
19	Contact support	Provide useful diagnostic context without exposing secrets.

SECTION 01

Account access

Create, verify, sign in, and recover your customer account.

Customer Account > Create your account

- 1 Enter your name, company, email address, password, and matching password confirmation.
- 2 Open the SEOPlan verification email and use the verification link for the same email address.
- 3 Sign in from Customer Login. Use the eye control only to reveal or hide the password on your device.
- 4 If access is lost, use Lost your password? and follow the newest one-time recovery link.

Important: SEOPlan support should never ask for your password, verification token, API key, or card details.

SECTION 02

Dashboard and website context

Make sure every detailed panel belongs to the website you intend to review.

Customer Account > Website being viewed

- 1 Open the website selector near the top of the dashboard.
- 2 Choose the website or domain label you want to investigate and wait for the page to reload.
- 3 Confirm the selected domain before reading reports, monitoring, Google data, AI analysis, market research, alerts, actions, or the Weekly Brief.
- 4 Switch the selector whenever you work on another website. The latest selection is remembered for your account.

Important: Plan, billing, team membership, account settings, and total allowances are workspace-wide rather than website-specific.

SECTION 03

Plans and paid access

Understand what Free, Foundation, Growth, and Scale unlock.

Customer Account > Overview or Compare plans

- 1 Use Overview to confirm the current plan, subscription state, website allowance, audit allowance, and remaining usage.
- 2 Free provides public and evaluation workflows. Foundation adds connected evidence and decision tools.
- 3 Growth increases capacity and adds recurring monitoring, alerts, and stronger collaboration.
- 4 Scale supports custom capacity, larger teams, onboarding, and read-only customer API access.

Important: The live Compare plans page is authoritative for current prices, limits, and availability.

SECTION 04

Websites

Add, label, select, and remove domains from the workspace.

Customer Account > Websites

- 1 Enter the root domain, such as example.com, rather than a private administration URL.
- 2 Add a useful label, such as Main website or UK store, and select Add website.
- 3 Use the global website selector to move between saved websites.
- 4 Before removing a website, review its monitoring schedules, reports, and connected-property assignments.

Important: Owners and Managers can change websites. Other roles receive narrower access according to their permissions.

SECTION 05

SEO audit reports

Run a private audit, interpret results, export evidence, and delete reports.

Customer Account > Reports

- 1 Submit a public HTTP or HTTPS address and select Create Private Audit.
- 2 Start with the score, failed checks, warnings, site-wide priorities, and affected pages.
- 3 Use Download CSV for page inventory or Print / Save PDF for a portable snapshot.
- 4 Use Delete report when the record is no longer required. Deletion is immediate.

Important: Private reports expire after 30 days. Export anything needed for a longer internal record.

SECTION 06

Monitoring and alerts

Schedule recurring checks and understand changes, recoveries, and scan problems.

Customer Account > Monitoring and Alerts

- 1 Choose the correct website, then create an available monitoring schedule.
- 2 Treat the first successful run as the baseline; later runs compare against earlier evidence.
- 3 Review new issues, recoveries, score movements, and scan failures in Alerts.
- 4 Mark reviewed alerts as read and configure email alert preferences for important events.

Important: A scan failure means the comparison could not be completed; it does not prove that the website has an SEO problem.

SECTION 07

Google Search Console and GA4

Connect read-only Google evidence and assign the correct properties to each website.

Customer Account > Google Data

- 1 The workspace owner selects Connect Google and signs in to a Google account with the required property access.
- 2 Approve the Search Console and Analytics read-only permissions.
- 3 For the selected website, choose the matching Search Console and GA4 properties and save them.
- 4 Review the latest complete 28-day evidence, priority signals, landing pages, and history.
- 5 Disconnect Google to remove saved tokens, or revoke SEOPlan from Google Account connections.

Important: Search Console and GA4 finalize data on different schedules. Recent changes may not appear immediately.

SECTION 08

AI SEO Analyst

Create an evidence-guided analysis for one selected website.

Customer Account > AI SEO Analyst

- 1 Select the website at the top of the dashboard and verify that the Analyst shows the same domain.
- 2 Select Generate analysis. A fresh request uses the displayed monthly allowance; unchanged evidence may reuse a saved result.
- 3 Read the evidence summary, confidence labels, limitations, and prioritized opportunities.
- 4 Send useful recommendations into the Action Plan and track them through implementation.

Important: Relevant audit and matching Google evidence may be analyzed. Passwords, billing details, API credentials, and unrelated website data are excluded.

SECTION 09

SEO Market Opportunity

Use DataForSEO evidence to compare demand, visibility, and competing domains.

Customer Account > SEO Market Opportunity

- 1 Select the workspace website and confirm the domain shown in the tool.
- 2 Choose the target country and language in Search market.

- 3 Select Generate market report. Refresh the page if a completed report does not appear immediately.
- 4 Review keyword demand, observed rankings, opportunity scores, and competing domains.
- 5 Validate important decisions against the website's real Search Console evidence before implementation.

Important: Provider metrics and traffic opportunities are directional estimates, not guaranteed rankings, visits, or revenue.

SECTION 10

Action Plan

Convert evidence into assigned work with status and later impact review.

Customer Account > Action Plan

- 1 Add a useful Google signal or AI recommendation to the Action Plan.
- 2 Assign an eligible person and change the state from To review to In progress.
- 3 When the implementation is complete, mark it Done so a baseline can be saved when evidence is available.
- 4 After the measurement window matures, review Measured impact as directional evidence.
- 5 Use Dismissed for a deliberate non-action rather than clearing unfinished work as Done.

Important: Observed movement does not prove that one action caused the outcome. Record other releases and external factors.

SECTION 11

Weekly SEO Brief

Use the weekly summary to choose the next work rather than merely collecting metrics.

Customer Account > Weekly Brief

- 1 Confirm the selected website before reading the brief.
- 2 Compare Search Console and GA4 movement with the previous complete period.
- 3 Review actionable Google signals, open Action Plan items, monitoring, and unread alerts.
- 4 Use the email link to return to the live dashboard; the email is a summary, not a permanent report.

Important: A new metric means activity is newly observed and may not yet have a useful comparison period.

SECTION 12

Team access

Invite people with the minimum role required for their work.

Customer Account > Team

- 1 The owner enters an email, chooses Manager, Analyst, or Viewer, and sends the invitation.
- 2 The recipient accepts using the exact email address that received the invitation.
- 3 Use Save to change a role or Remove to revoke membership.
- 4 Review roles when responsibilities change or a person leaves the organization.

Important: Only the workspace owner controls billing, Google connections, API keys, and destructive membership decisions.

SECTION 13

Billing and subscriptions

Understand active, scheduled cancellation, past-due, upgrade, and downgrade states.

Customer Account > Billing

- 1 Use Manage Billing for Stripe-hosted payment methods, invoices, and available subscription changes.
- 2 An active subscription keeps paid access through its displayed renewal date.
- 3 A scheduled cancellation remains active until the paid period ends and may be reactivated when eligible.
- 4 During a past-due grace period, update the payment method before access is reduced.
- 5 Upgrade the existing subscription rather than purchasing a second subscription.

Important: Stripe handles card details. SEOPlan stores only the identifiers and state needed to enforce access.

SECTION 14

Customer API

Create, store, use, rotate, and revoke Scale read-only API keys.

Customer Account > API Access

- 1 The owner creates a key and copies the full value immediately; it is shown only once.
- 2 Store the key in a protected server setting or secret manager, never in email, screenshots, or source code.
- 3 Send it only to documented SEOPlan endpoints with the required authorization header.
- 4 Rotate or revoke it when access changes or exposure is suspected.

Important: Revocation immediately stops clients using that key. Deploy a replacement first when continuity is required.

SECTION 15

Settings and company profile

Keep customer and organization information accurate.

Customer Account > Settings

- 1 Review the signed-in user's name and account email.
- 2 Add or update permitted company details and use the relevant save action.
- 3 Manage delivery preferences separately under Alerts.
- 4 Use Google Data and Billing for provider-specific settings rather than placing secrets in profile fields.

Important: Changing an SEOPlan profile does not automatically edit the corresponding Google or Stripe account.

SECTION 16

Public tools

Use focused checks that do not require connected customer data.

Resources menu

- 1 SEO Audit checks observable technical and on-page signals.
- 2 Indexability Checker explains whether a public URL appears available for crawling and indexing.
- 3 Opportunity Scorecard ranks ideas by benefit, evidence, and implementation friction.
- 4 ROI Calculator models a transparent scenario; it is not a forecast or guarantee.

Important: Public tools do not replace connected Google evidence, scheduled monitoring, AI analysis, or market research.

SECTION 17

Privacy and retention

Know what is retained and how to remove provider access or reports.

Customer Account and legal pages

- 1 Private audit reports expire after 30 days and can be deleted earlier.
- 2 Disconnecting Google removes saved connection tokens; access can also be revoked from Google.
- 3 Stripe processes payment details while SEOPlan stores necessary subscription references and state.
- 4 Review the current Privacy Policy and Terms of Service for the formal framework.

Important: Do not place passwords, API keys, payment details, or unrelated personal data into ordinary dashboard fields.

SECTION 18

Common questions and troubleshooting

Use the narrowest recovery step and avoid repeating destructive or billable actions.

Help Center > Search the knowledge base

- 1 Missing email: check Spam, confirm the exact address, wait briefly, then request one replacement.
- 2 Queued report: confirm the site is public and wait for the next background-work interval rather than creating duplicates.
- 3 Missing Google property: confirm that the selected Google account has property access and required permissions remain approved.
- 4 No market report after completion: refresh the dashboard once and confirm the selected website and market.
- 5 Wrong website data: return to the website selector and verify the current property context.
- 6 502 Bad Gateway: retry once after a short wait; if repeated, record the time and URL for hosting support.

Important: Never solve a display problem by repeatedly generating paid reports, creating duplicate subscriptions, or deleting evidence.

SECTION 19

Contact support

Provide useful diagnostic context without exposing secrets.

Help Center > Contact SEOPlan Support

- 1 Identify the page or dashboard section and the selected website.
- 2 Provide the approximate date, time, timezone, preceding action, and exact visible error.
- 3 Include a report identifier only when it is safe to share.
- 4 Redact passwords, API keys, payment details, OAuth tokens, and private customer data from screenshots.

Important: Use <https://seoplan.com/contact/> for support and <https://seoplan.com/help-center/> for the live searchable guide.

Glossary

Term	Meaning
Audit	A snapshot of observable public-page conditions at scan time.
Baseline	The earlier evidence used to compare later monitoring or action impact.
Evidence signal	A measurable change or condition that may deserve investigation.
Fresh request	A new paid provider or AI request rather than reuse of a saved result.
GA4	Google Analytics 4 website and event reporting data.
Property	A Search Console or GA4 data source assigned to one workspace website.
Website context	The domain currently selected for detailed dashboard evidence and workflows.

Need more help?

Search the live knowledge base at seoplan.com/help-center/ or contact support at seoplan.com/contact/.
Never include passwords, API keys, OAuth tokens, or payment details in a support message.