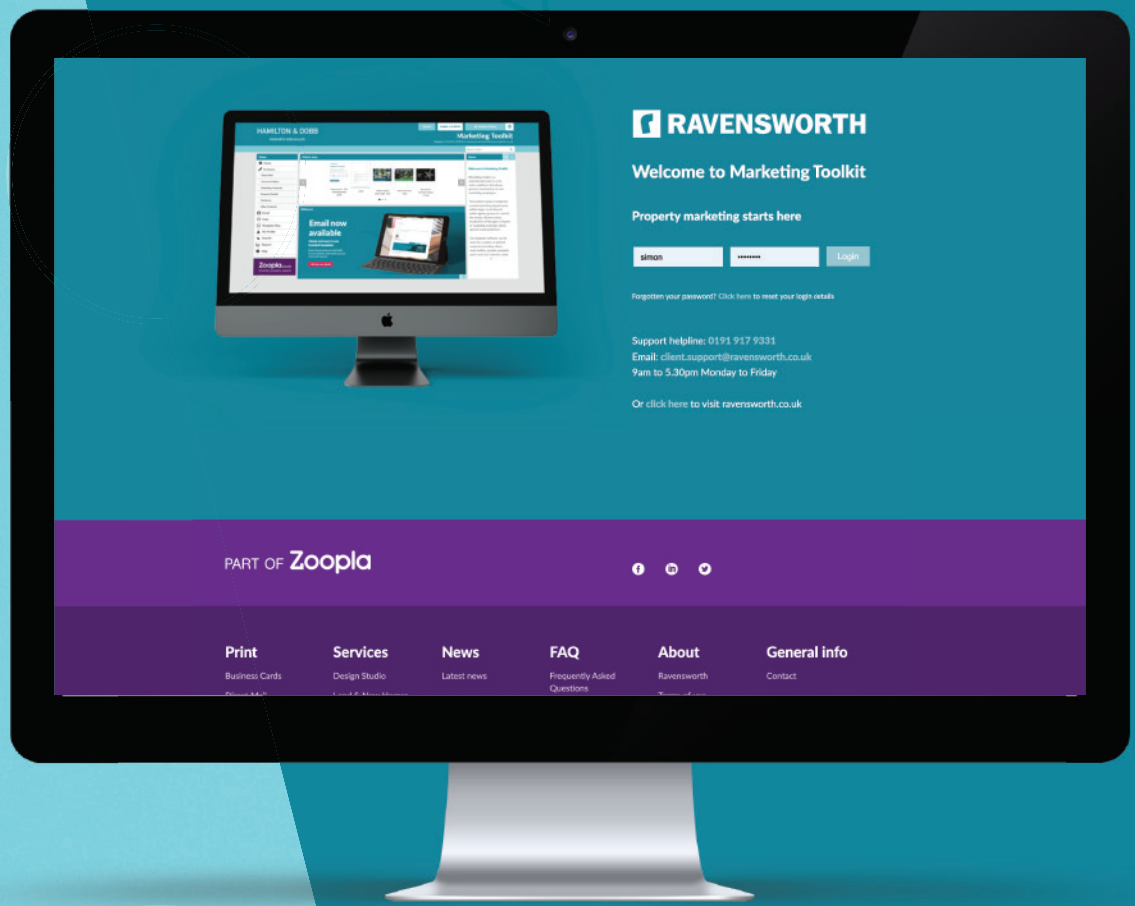
RAVENSWORTH

Marketing Toolkit

User guide



marketingtoolkit.ravensworth.co.uk

Contents

Introduction and logging-in

Marketing Toolkit is a modular and customisable Marketing Portal, that is made up of four components:

Direct Mail
Printed Products
E-mail Advertising*
Merchandise.

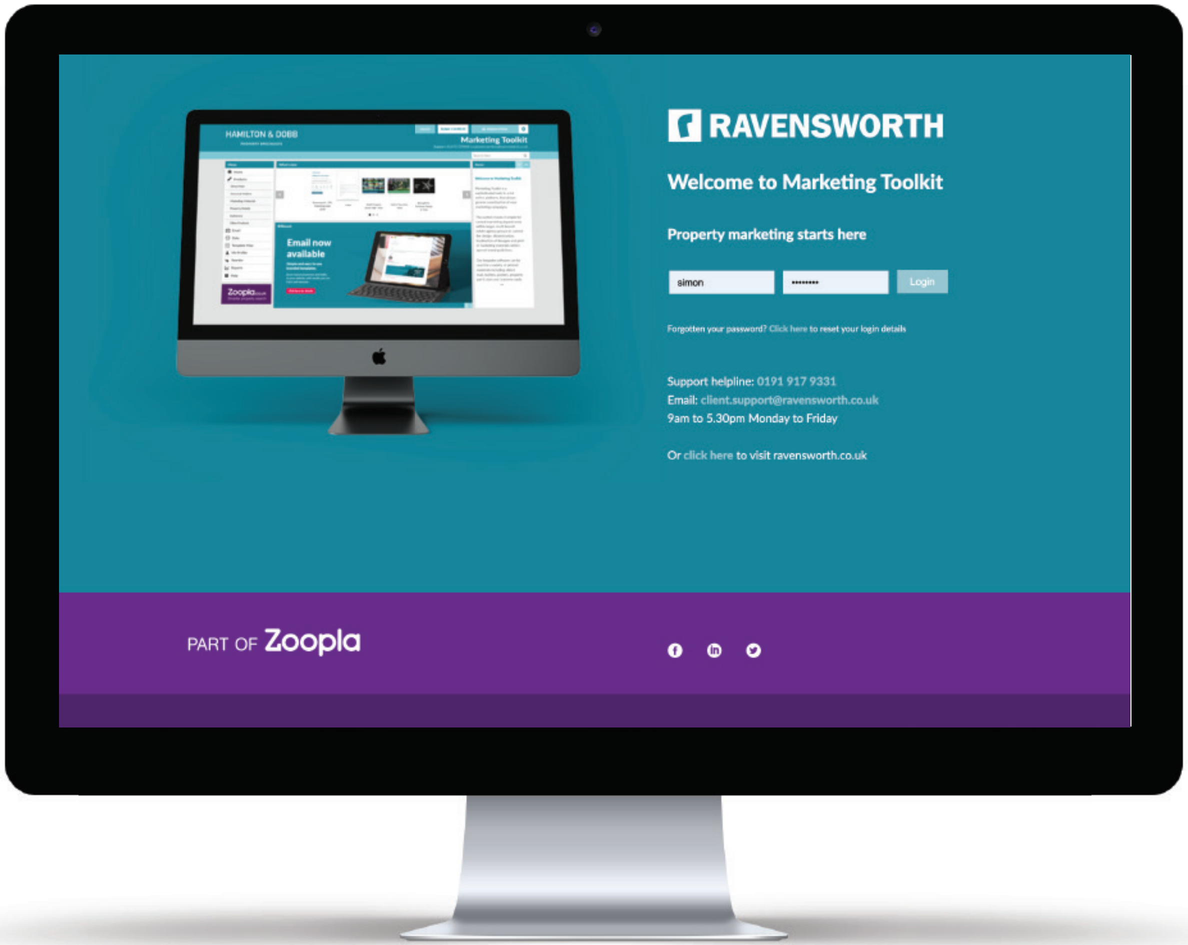
For optimal performance we recommend using the Google Chrome Web Browser.

Find your Marketing Toolkit Site 24/7 at:
https://marketingtoolkit.ravensworth.co.uk

Make this a 'Favourite' in your browser. Press (Ctrl-D) to do this while on the page.
Live support is available during office hours. Mon – Fri. 9am – 5:30pm (excluding Public Holidays).

Logging-in

Enter your username and password and click 'Login'.



*Email is an optional feature

For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Products and Services

Homepage

The **Menu** 1 on the left contains links to all of the products and services available to each user.

Click the **Home** link to return to the Home Page from any other Page.

The **Products** menu is arranged into categories of Templates. Click through the categories to find the Template you require.

Email is an optional component with a simple 'drag and drop' content builder, easy to use scheduling and simple but powerful reporting.** See separate email service user guide.

Data: Select and purchase address data before creating your Direct Mail order here.

Template Map: Locate and select a template from this categorised list. The size of the document and a preview are shown on the right.

My Profile: Your contact details are stored here.

Reorder: Provides rapid access to previous orders making repeat ordering easier.

Reports: Use the 'Order Status' report to keep track of your orders. Other report types are available.

Help: For immediate assistance during office hours click the CHAT Button. You will also find our contact information, and the link to our knowledge centre where we have many 'how-to' guides and video content.

General admin provides administrative support to authorise orders, update budgets. The billboard and file management services are also found here.*

User Admin: Manage user accounts here.*

The **Carousel** 2 can be used to provide quick access to new or frequently used templates. Select and click onto the template of your choice to begin.

Find news of upcoming events or new products or services with the **Billboard** 3

Further information can be displayed in the **News** Pane 4 on the right.

The **Search Tool** 5 in the upper right corner can be used to find a template, but not a document. Type the full or partial name of the template you need and press enter (or click the magnifying glass icon).

The "What's New" Carousel, Billboard and News Pane are managed through the General Admin Tools*.

*Administrators only. **Additional service. Further charges apply.

For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

My Profile

Updating My Profile

Click **My Profile** from the menu on the left to update your contact information. Fields marked with * are required. Our dynamic templates access this information so you should ensure it is kept up to date.

Logo

Drag and drop or click the ‘Upload’ button to add your company logo for use in applicable templates. (.jpg, .png, .tif, .eps and .pdf are supported.)

Important: Logo quality is critical to professional printing. We recommend using a CMYK vector PDF.

Transparent PNG’s can be effective, but please check the dimensions of your logo to ensure quality can be maintained. We recommend around 1200px wide, but have set a minimum of 800px wide. Please contact us if you have any questions or would like expert advice.

Company Colour

Set your company colour for use in applicable templates. We recommend using CMYK values, but accept RGB and Hex values are also acceptable. Please note: CMYK colours may appear differently on your RGB screen but will still print correctly.

For more in-depth information please visit our Knowledge Centre, accessible from the ‘Help’ tab

Working with documents

Marketing Toolkit templates are dynamic and easy to use. Almost all work in the same way. Just add new, or edit existing content. All formatting takes place automatically and you can use the same content to create multiple documents with ease.

Finding templates and documents

Templates are stored in folders relating to the type of content. These are often called 'Campaigns'.

Use the Carousel 1, Products Menu 2, Template Map 3 or Search Tool 4 to find the template or document required.

Creating a new document or finding an existing document

Documents are either editable (with an edit button) or non-editable (with a create button)

Most templates have three buttons:-

Preview: allows you to see what your finished document should look like.
Price: Enables you to check the cost of your order before you place it.
Create: Click this button to start a new document or to access a previously created one.
Order: Click this button to begin the ordering process.

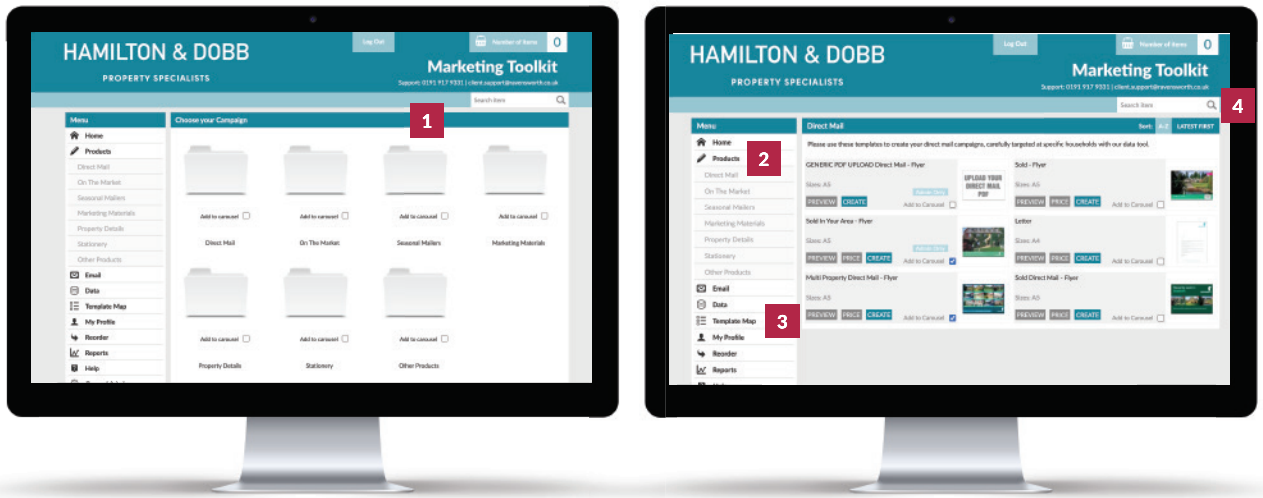
Creating a new document

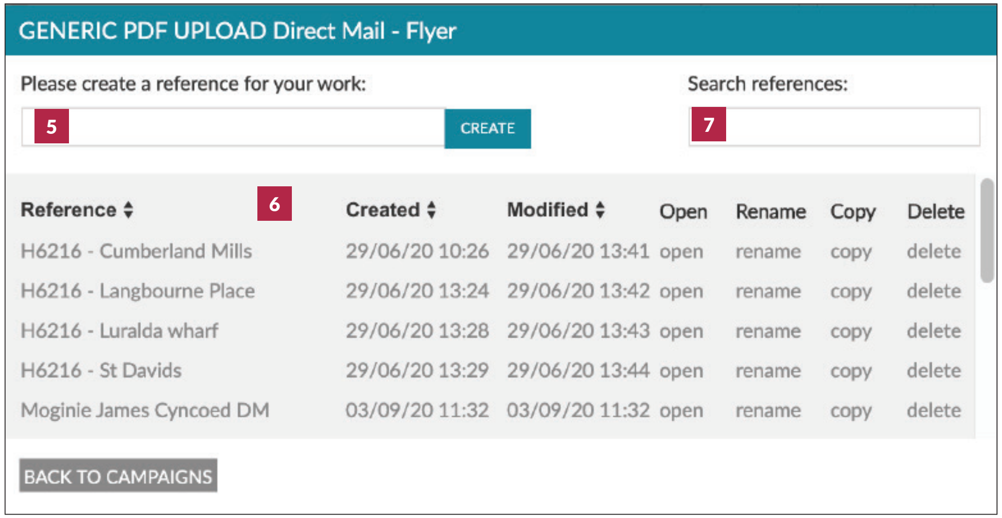
Click the '**Create**' button. The file system window will appear and here you can type a name for your new document in the text field 5 in the upper left corner and click the '**Create**' button.

Finding an existing document

Click the '**Create**' button. In the window that appears the lower grey section 6 will show a list of previously created documents. Select an action from Open, Rename, Copy and Delete. Check the creation and modified dates to find the latest version of you document.

Entering any text in the **Search References** Field 7 in the upper right corner of the file system window automatically searches for the document you need.





Working with documents

Editing a document

The middle section of the screen shows the content tabs. These are ‘Upload Images’, ‘Insert Text’ and ‘Branch Details’. The content tabs vary between template types.

The document preview appears on the right. Above you will find action buttons to ‘Save’, ‘Order’, ‘Start Again’ or ‘View PDF’. An extra ‘Update’ button appears for brochures, click this to update the document preview.

Below the preview you’ll see links to preview each page in your document. Remember to save your content regularly.

Adding images to the library

Click ‘Open Image Library’ 1 . Click ‘Upload Images’ 2 . Drag one or more images into the dashed-lined box 3 OR click on the red button, select and click ‘Open’. Your images will then be uploaded to the library. Click ‘Upload More’ or ‘Next’ 4 to add more images. Click the pencil icon to rename, delete or download an image. Click the ‘x’ icon to delete an image.

Access previously added images

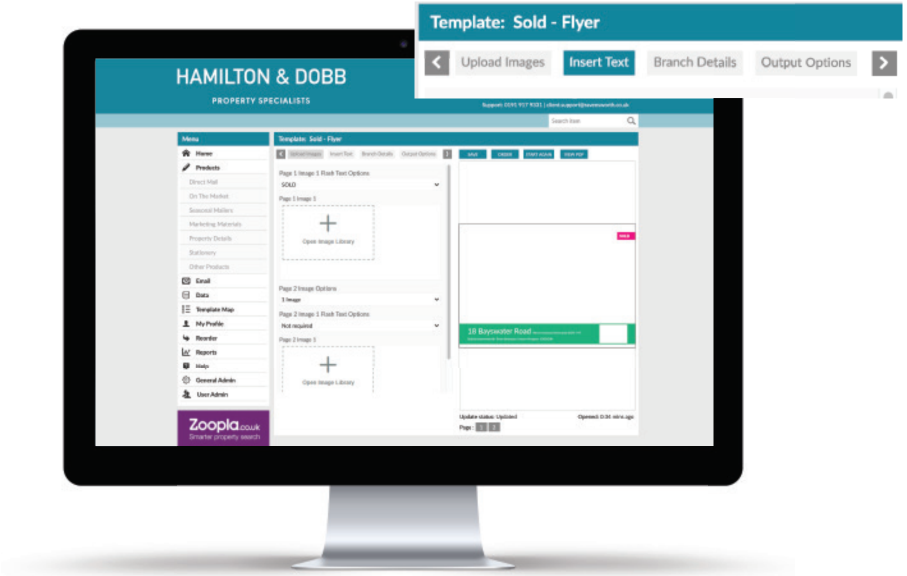
Click ‘View Other Libraries’. Choose a document from the list to see the images associated with that document.

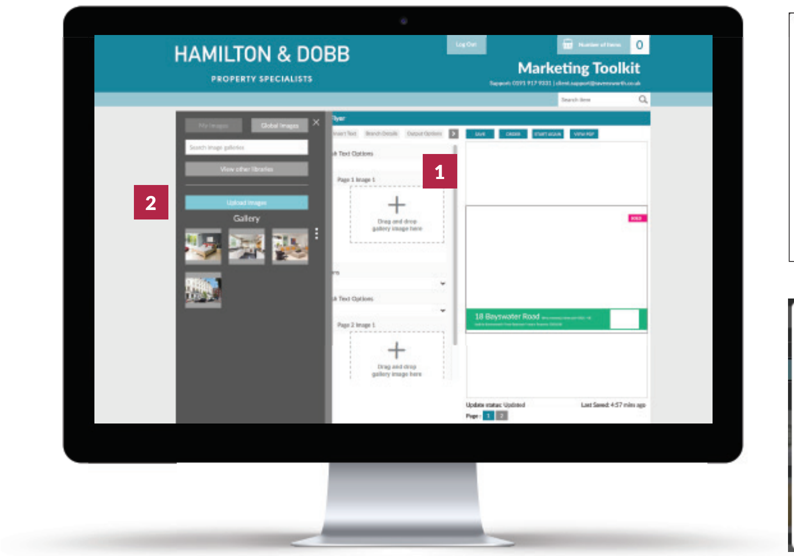
Click and drag the image required into a picture frame in your document then close the gallery window.

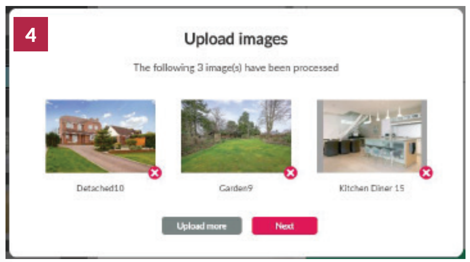
Global images

Shared images such as staff and branch photos and your logo are stored here. Open the image library and click the ‘Global Images’ button. Open an existing folder to add images. You can also click ‘New Gallery’, the pencil icon to rename and the ‘x’ Icon to delete a folder.

Deleting images: Click on the ‘X’ in the lower left corner or view the original image by clicking the pencil icon.







For more in-depth information please visit our Knowledge Centre, accessible from the ‘Help’ tab

Working with documents

Adding an Image to your document

Click and drag each image from the Gallery [1] in-turn into an empty picture frame. [2]
Click onto the white 'X' at the top of the Gallery window to close it when done.
Removing an image: Click the white 'X' inside the red circle
Replacing an image: Click the grey curved arrows symbol. When the gallery appears click-and-drag the replacement image into the picture frame. Close the gallery window when done.
Cropping an image Click on the red 'Crop Image' button. Increase the size of the image and move it until the desired area fits within the white box. Click 'Confirm' or 'Cancel then close the gallery window.

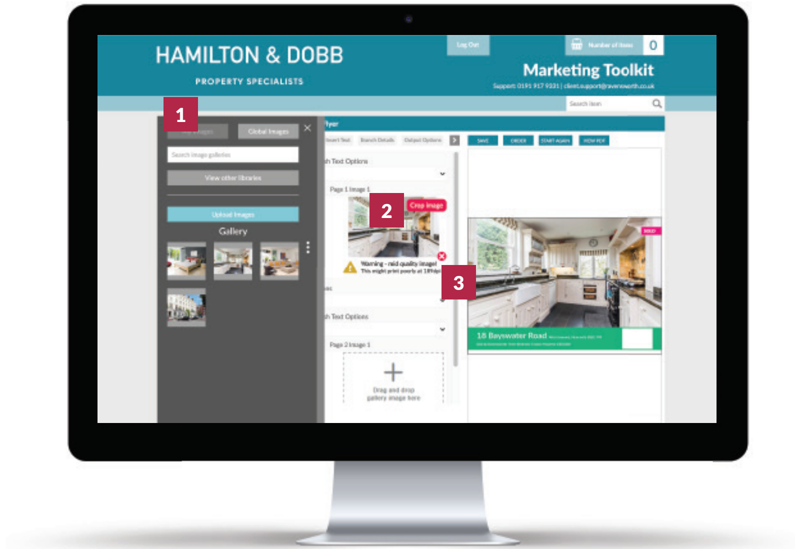
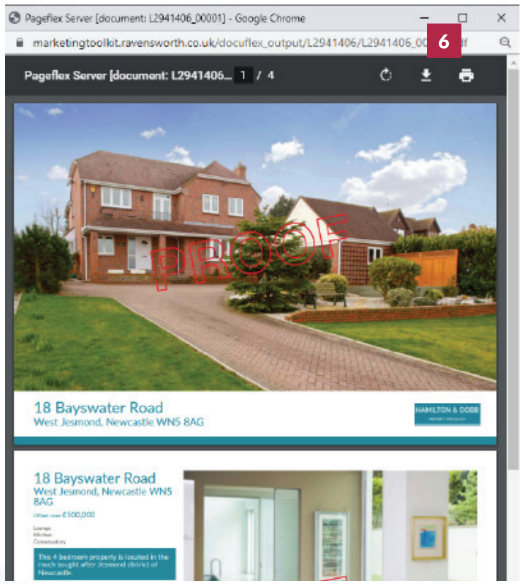


Image quality

For best results we recommend uploading jpeg images of around 2MB. Colour coded icons and a description [3] provides you with information about the quality of your photos. From green for good to red for poor. We recommend that you replace any poor quality images.
Need help with better looking images? Check out Photofixr™ our professional image editing service.

Editing text

On the 'Insert Text' Tab [4] type or paste-in copied text into the text fields provided.
The size of the text is determined by the amount of text added into a single text field.
Avoid adding too much text into a single text field.
Read any existing text carefully. You may be required to add or substitute some of it.



Viewing the PDF proof

Click the 'View PDF' button [5] to see a larger PDF proof of your document.
You can download or print the PDF proof by clicking the appropriate button in the upper right corner. [6]

ALWAYS check your PDF proof carefully before placing an order.
*The PDF proof is not of high resolution.

For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Placing a print order

Placing an order

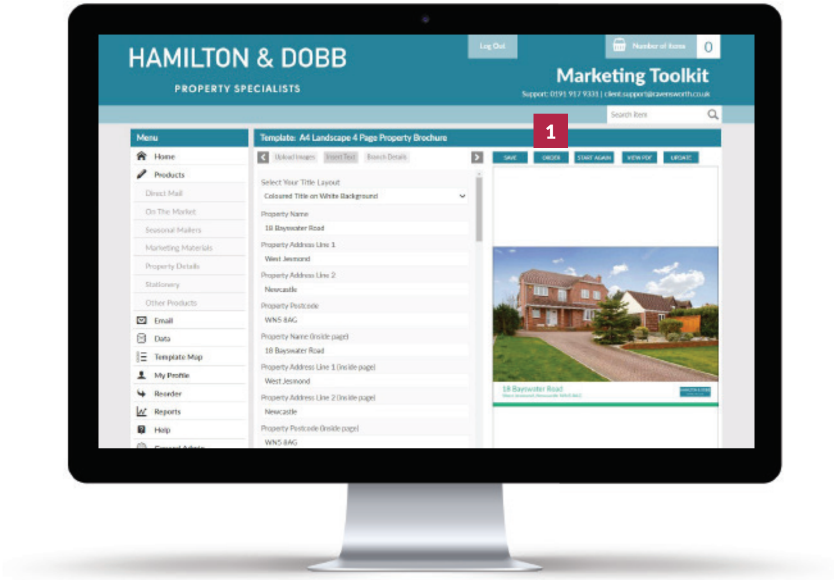
Click ‘Order’ 1

Choose a paper eeight (if applicable) and quantity. 2

Click ‘Order’. 3

Click ’Add Order to Basket’. 4

You will then be taken to the basket window. See topic: **THE BASKET**.



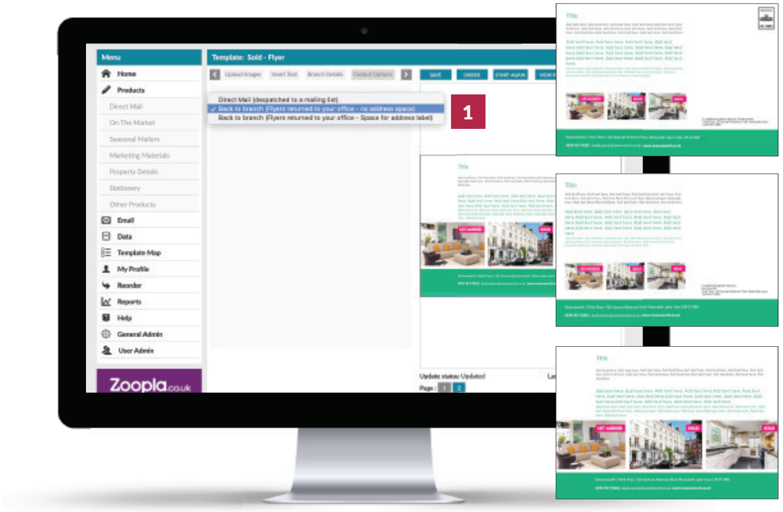
Direct Mail - Creating a Direct Mail document and obtaining address data

Creating your Direct Mail document

Follow the advice given earlier on adding your content to a document. Always check a PDF proof before placing an order. You will see a new tab 'OUTPUT OPTIONS' which is set to Direct Mail by default.

Direct Mail flyers can also be ordered on a 'Back-to-Branch' basis.
From the 'Output Options' tab 1 select a back-to-branch option.

When you place your order you will be prompted to input the quantity and paper weight required. 2 Make your selections and click 'Order' then 'Add to Basket'. 3
You will be shown the basket window.



Obtaining postal addresses for Direct Mail

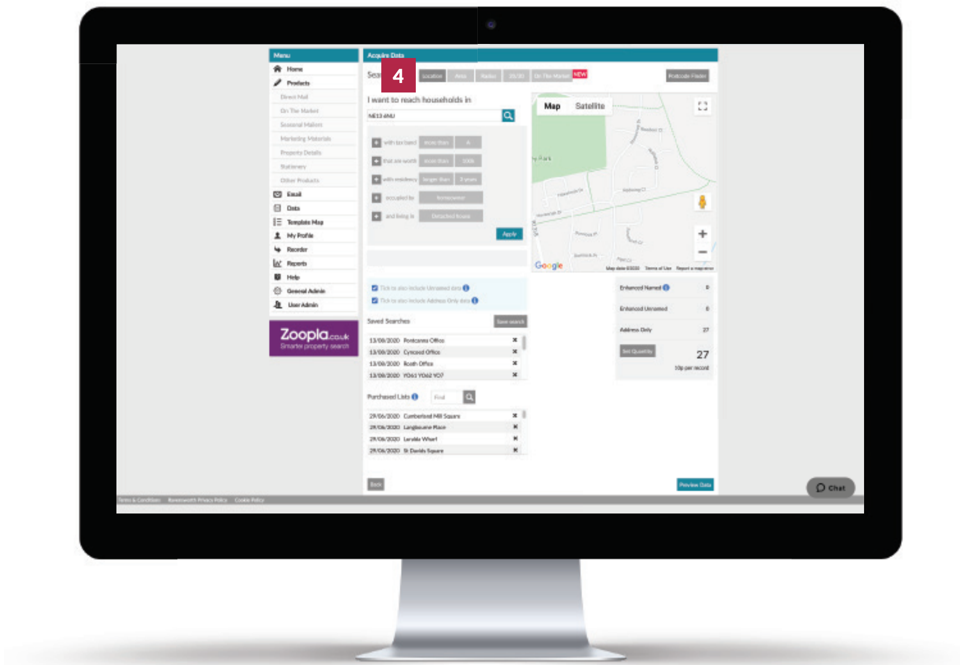
We can provide either geographical addresses or information on properties currently on the market. We only supply UK residential addresses and adhere strictly to GDPR Regulations.

You cannot copy, save or export address data from Marketing Toolkit. To begin click 'DATA' then 'Search Data'.

Performing a Search

There are four different selection tools. Only one may be used at a time. To use a different selection tool delete any added text or delete the drawn shapes or circles.

Location 4 Type a full or partial postcode and/or area name into the text field below. Search for more than one area by adding a comma between your search terms. Click the magnifying glass icon (or press 'Enter')



For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Direct Mail - Finding address data

Area 1 Click the 'Draw Area' button at the bottom of the Map. Click onto the map. A white dot appears. Move the mouse to a new map location and click again. Repeat the process to draw a shape. Click on the start point to complete the shape. You can adjust the shape and size by dragging a white resize handle to a new position.

You can draw up to 256 individual colour-coded shapes. Their matching coloured name appears below the map. Click on the 'x' next to the name of the shape you wish to delete.

Radius 2 Choose an initial search size from the drop-down list at the bottom of the map. Click 'KM' to change to miles. Click 'Add Pin'. Adjust the size of the circle by dragging the white re-size handles. Click and drag from the centre handle to move a circle. Add further colour coded circles by clicking 'Add Pin' again.

You can add more than one circle to the map at any one time. Their matching coloured name appears below the Map. Click on the 'x' next to the name of the circle you wish to delete.

20/20 3 First select the number of results required. Enter an area name or postcode and click the magnifying glass icon (or press Enter) OR click 'Add a Pin' and click onto the map to select an area. Delete a pin by clicking onto the 'x' at the bottom of the map. You will be shown the results of your search.

1

2

3

For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Direct Mail - filtering and puchasing address data

Filtering your results

You can apply any of the basic and advanced filters to your results, however, The Council Tax Band and Property Value filters cannot be used together.

Applying basic filters: 1

The Basic filters are: Council Tax Band, Property Value, Length of Residence, Occupied by (Owned or Rented) and Living-in (Build Type). These are disabled by default.
Click onto the '+' symbol to enable a filter.
Click through the options available and click the 'Apply' button to see the results.
Click onto the '-' symbol to disable a filter.

Applying advanced filters: 2

To enable an advanced filter: Click onto the filter required, select the options required and click 'Apply'. To remove an advanced filter click onto the 'x' next to it's description.

Previewing data

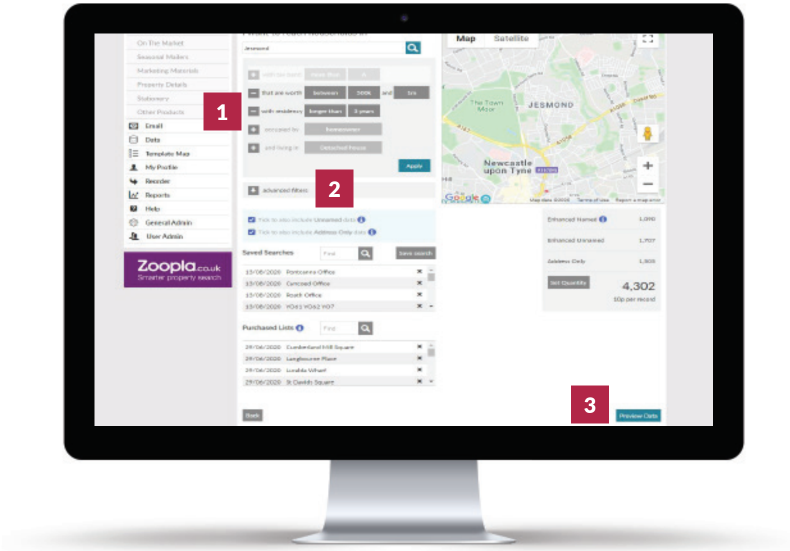
Click the 'Save Search' button and name and save your results. Click onto the name of your saved or purchased data to reload it. Click the 'Preview Data' 3 button to continue.

In the name column you may see [Enhanced Name] and some blanks.
From the drop-down list 4 at the bottom of the name column you can fill in the blanks with: The Occupier, The Tenant, The Homeowner or The Legal Owner (unnamed only) OR change all names to one of these terms (e.g. The Homeowner (All Records).

Making exclusions and buying data

To exclude an address tick the box in the exclude column 5. Use the search function 6 in the upper left corner to make larger numbers of exclusions. Enter an area name or postcode and click the magnifying glass icon (or press Enter). At the bottom of the exclude column tick the box labelled 'Select/Deselect all'. Click the 'x' to the right of the search term used to perform the exclusion.

When you have filled-in the name column and made your exclusions click 'Buy Data' 7, enter a name for your data and click 'Continue'. Click 'Buy' to complete the purchase.



For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Direct Mail - On the Market data

On the Market Data supplied by LeadHub

Our On the Market data comes without contract or subscription, is 99% accurate and is updated each working day.

Performing a search

First select the size of your search radius 1 (from25m to 10KM. Default 5KM). Type a postcode into the text field 2 in the upper left corner and either press the enter key or click on the magnifying glass icon, OR click 'Add Pin' 3 and click onto the map. The system will return the available properties.

Apply filters if required 4. Applicable filters: Current Property Value, Length of Time on the Market and Build Type. These are disabled by default.

Click onto the '+' symbol to enable a filter. Click through the options available and click the 'Apply' button to see the results.

Click onto the '-' symbol to disable a filter.

Click the 'Save Search' button and name and save your results. You can click onto the name of your saved data or purchased data to reload it.

Click the 'Preview Data' 5 button to continue.

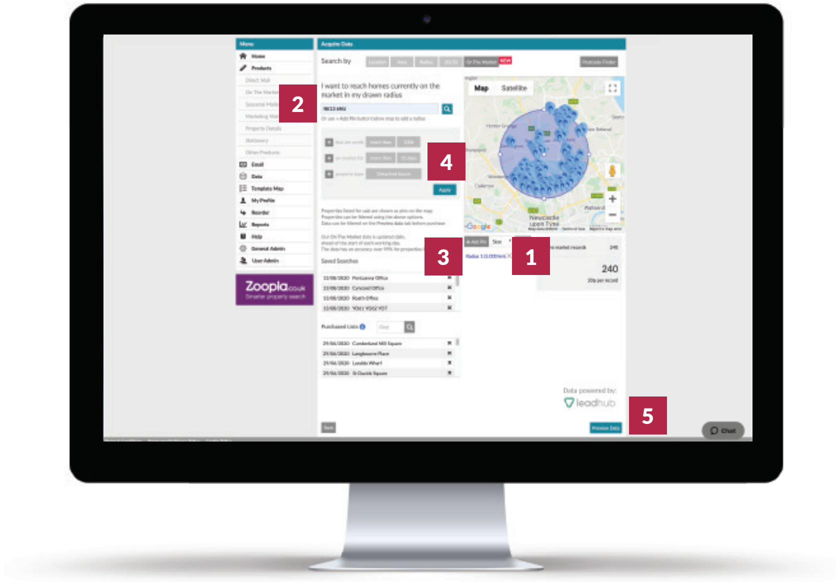
You are shown the streets on which the properties are located and the names of the listing agents.

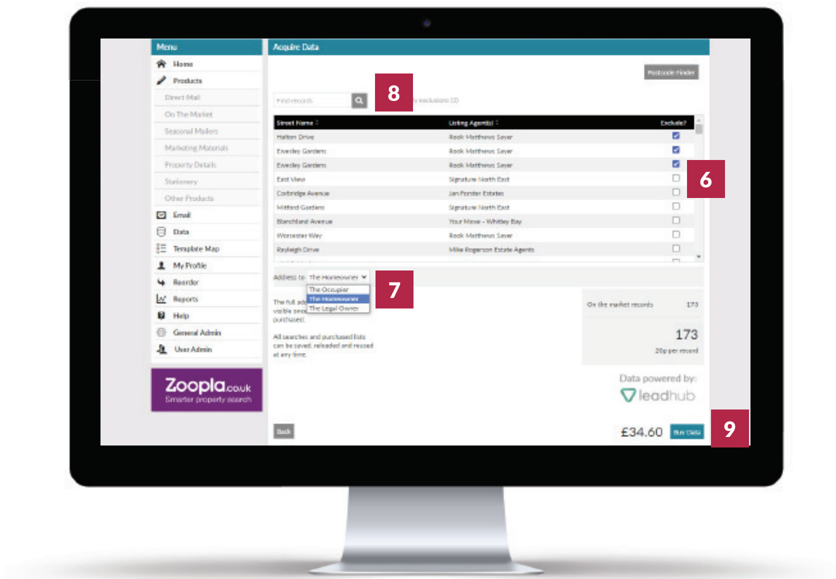
Place a tick in the exclude column 6 to ensure that your own clients are not contacted.

Occupier's proper names are not available from Leadhub. From the 'Address to' drop-down list 7 select either "The Occupier", "The Home Owner" or "The Legal Owner".

Click 'Buy Data' 8, enter a name for your data set and click 'Continue'. Click 'Buy' to complete the purchase.

Purchased address data is added to your monthly invoice immediately. Purchased address data is available for use for up to 90 days. Purchased data appears in the 'PURCHASE DATA' Panel in the 'DATA' Menu and in the 'Imported Data Selection' section of the Data Page when placing a Direct Mail order.





For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Placing a Direct Mail order

Placing your Direct Mail order

Once you have completed a Direct Mail document click 'Order'. If applicable, choose a Paper Weight. Click 'Next' to go to Data.

• Click 'Search Data' 1 to start a new data search. (Once you have purchased your Data you will return to this Screen so that you can complete your order), OR

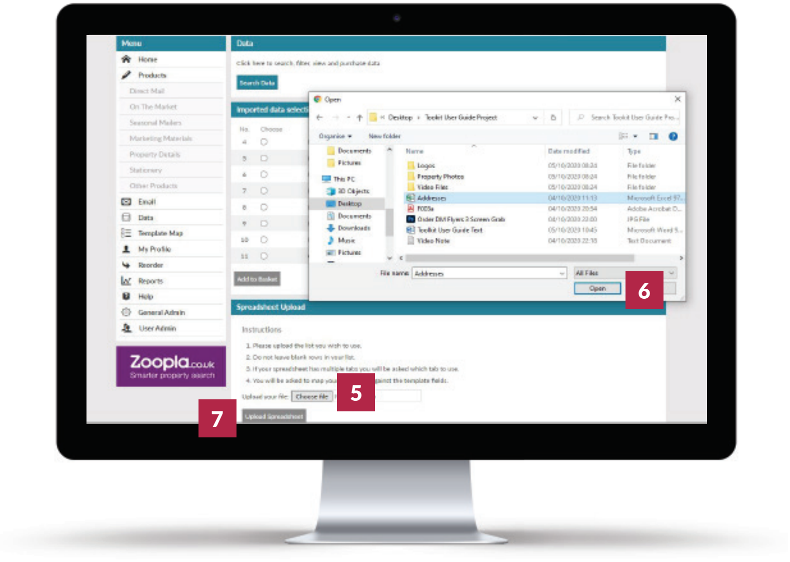
• Select a Data List you have previously purchased. Click the circular button in the Choose Column 2 , next to the Data List you wish to use and click 'Add to Basket' 3.

• OR Upload a Spreadsheet of Addresses of your own 4.

Uploading a Spreadsheet of your Own Data

This only occurs at the Data stage of the Direct Mail ordering process.

Click 'Choose File' 5 . Select your Spreadsheet File and click 'Open' 6 . Click 'Upload Spreadsheet' 7 .



For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Placing a Direct Mail Order - Uploading your own Data

Your spreadsheet will be uploaded and you will be shown the field matching dialogue Box 8 .

Match the columns from your spreadsheet to the address fields in your Direct Mail. Click ‘Import Data’ 9.

You will be shown a list of your recipients 10.

Click ‘Edit/Proof’ 11 to delete a record from the list or edit the text.

ALWAYS Click ‘Edit/Proof’ and click ‘View PDF’ 12 to check the format of the address data you have uploaded, on at least one or two of the listed recipients. Their address can be found on page 2 of the PDF. If in-doubt contact us.

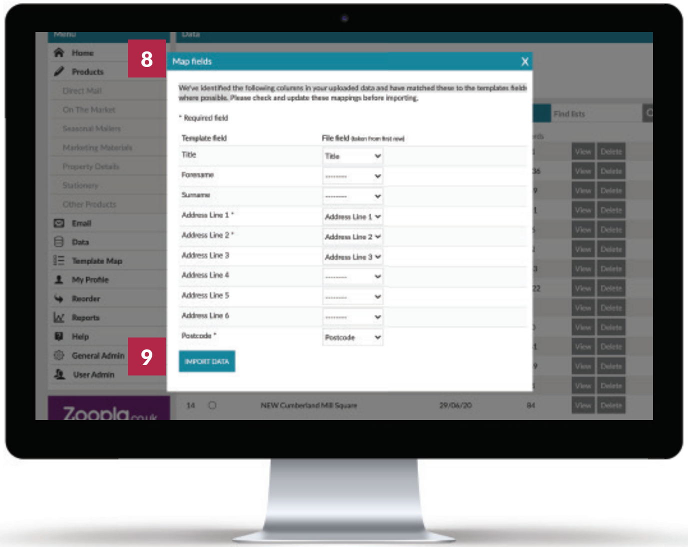
After checking a PDF proof close the PDF and recipient’s address record 13 .

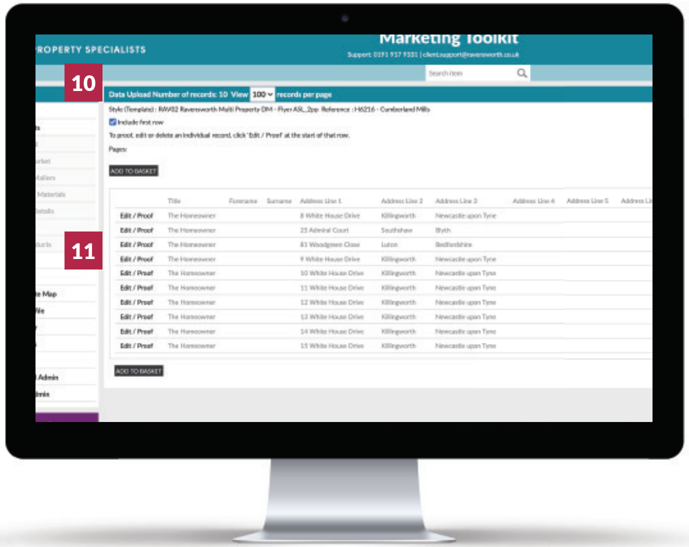
Click the ‘Add to Basket’ button 14 . You will be shown the basket.

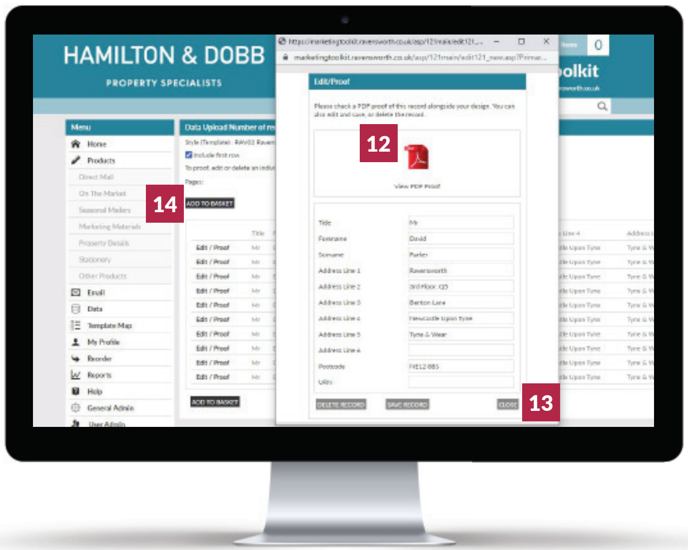
When you use our databases to purchase the use of address data you are automatically included as a recipient when your order is placed. If you upload a spreadsheet you will need to include yourself as a recipient.

Delivery & Returns

Production and delivery takes between 3 and 5 days. For your convenience we handle all returns. All physically returned direct mail comes to Ravensworth. Recipients can go to our website and enter their unique code printed onto every Direct Mail flyer. We then remove these addresses from our database.







Placing orders

The basket

A budget figure may be shown in the upper left corner.

From left to right you will see: a description of the Order 1, the [View] Link 2 enables you to view the PDF proof, Quantity 3 , Order Date 4 , Order Cost 5 and delete dutton. 6

If you have a budget you will be shown how much will be left if you place the order.

If the description includes the words "Variable Job" the items will be delivered by Post NOT to your office.

The delivery address 7 is shown in the lower left and the total cost 8 in the lower right.

An optional alternative address 9 drop-down list appears below the main delivery address. Use this to have your order delivered to another of your offices. (Does not apply to Direct Mail).

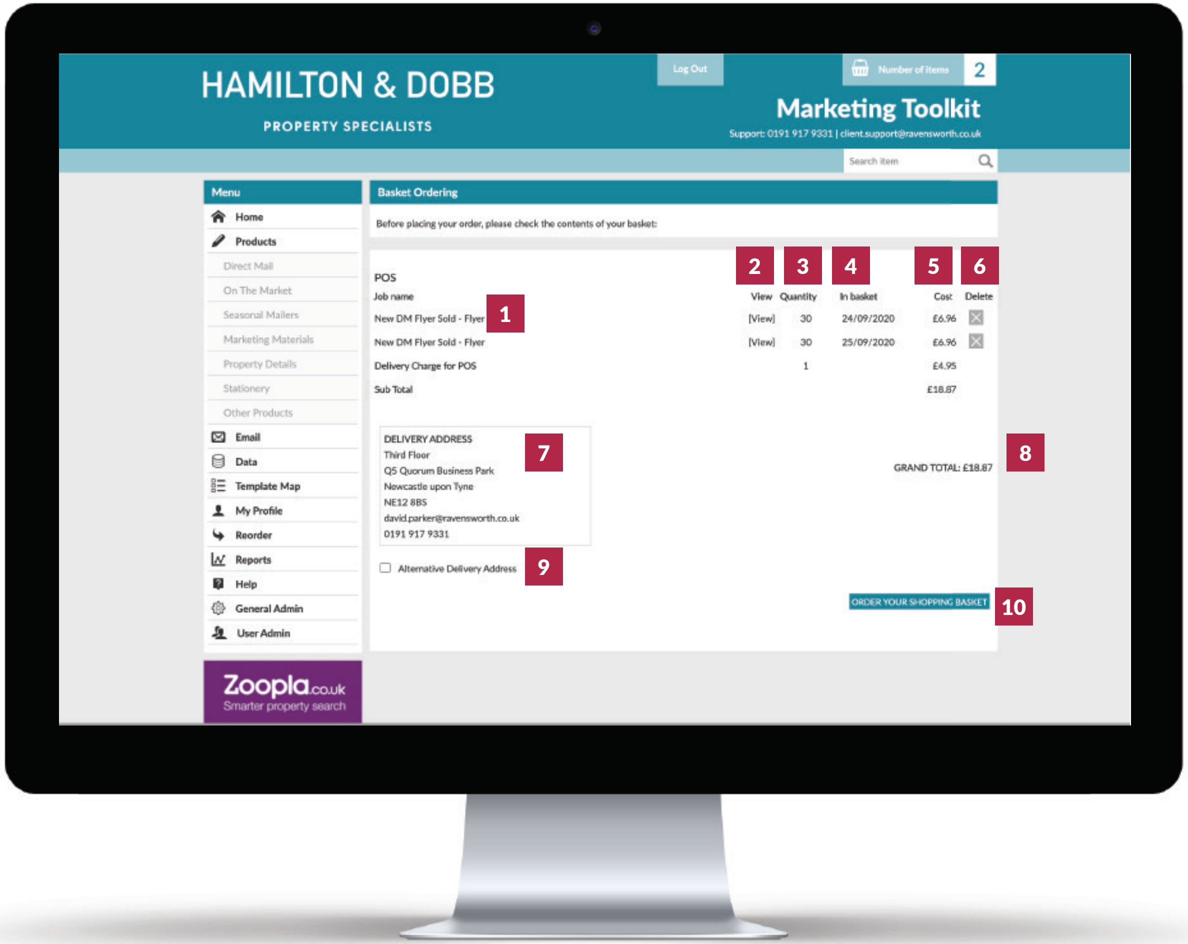
Complete your order

Click the order My Shopping Basket button 10 and then 'Yes' to confirm your order or 'Close' to return to the basket.

Order confirmation

An order acknowledgment message will appear advising you of the order reference number (DMK Number).

If you need to contact us your will need to know this. To find your order reference number or to check the status of you order go to REPORTS and click ORDER STATUS. See REPORTS.



Other services

REORDER 1

In a column on the left you will see a list or previous orders. To the right a ‘Reorder’ Button appears for each item. Click the appropriate button to begin the process.

This selects the original document used to place the order. You can edit the content or order the document in its original state.

EMAIL See our separate email advertising service user Guide for further details.

PDF UPLOAD 2

Select the type of product you wish to order. Enter your file name (or reference). Click ‘Choose File’.

Select your File and click ‘Open’. Click ‘Continue’. Your file will be uploaded and checked against the product selected. If the two match you will be shown your paper and quantity options (including Price). Click ‘Order’ and ‘Add to basket’ to continue. You will be taken to the basket.

DOCUMENT DOWNLOAD 3

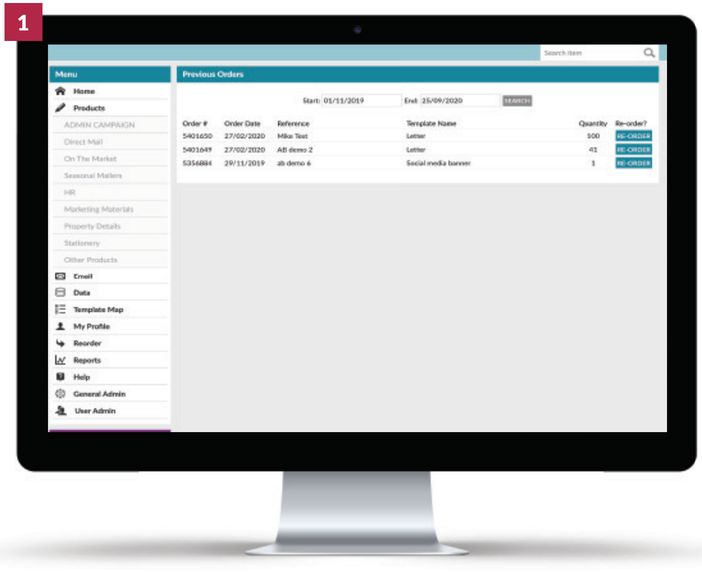
A useful repository for company forms and other documents.

Click the Download dutton to begin an immediate download of your chosen File.

MERCHANDISE 4

Click ‘Order’. Choose the quantity required then click ‘Order’ and ‘Add to Basket’. You will be taken to the basket. These ‘Pick & Pack’ items are set-up offline and warehoused ready for you to order.

1



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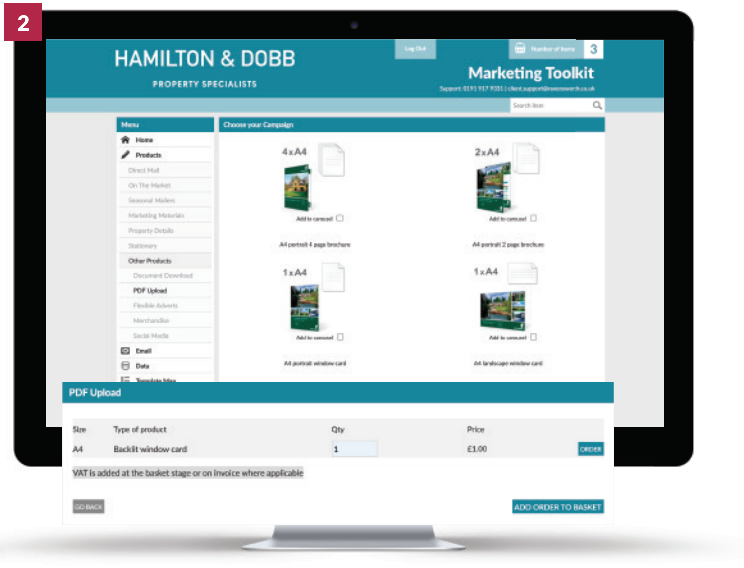

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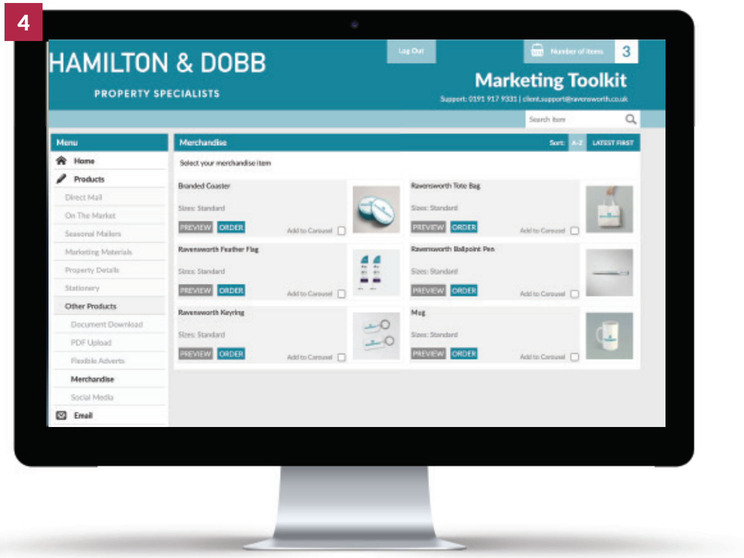


For more in-depth information please visit our Knowledge Centre, accessible from the ‘Help’ tab

Reports

There are many types of reports available. General users will usually see a different set of reports to managers. Most reports can be filtered by date, and the results downloaded as an excel file by clicking the 'Download to Excel' button.

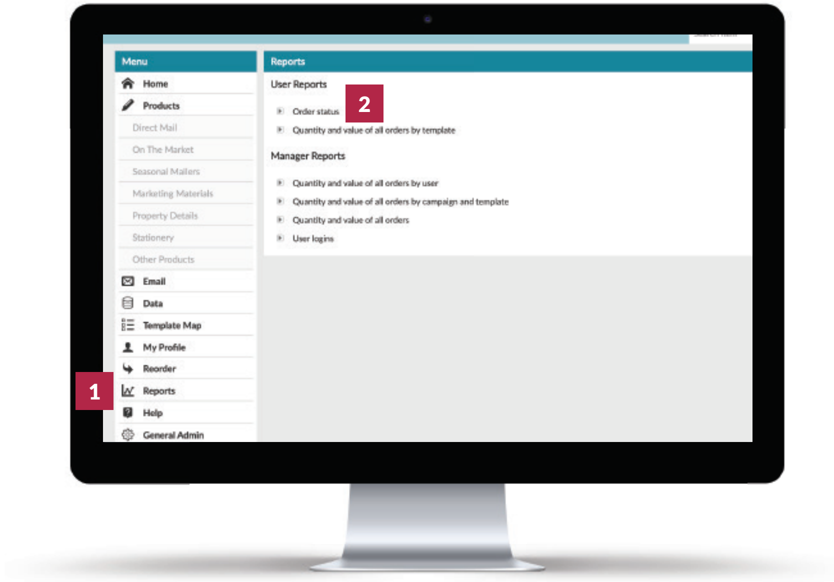
For all users the most commonly used report is ORDER STATUS. Click 'REPORTS' 1 then 'ORDER STATUS'. 2

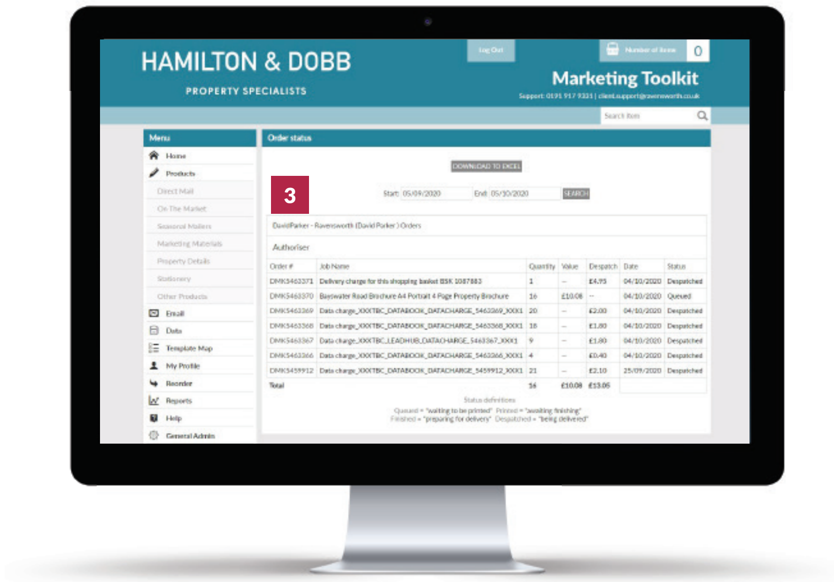
From left to right you will see: The order reference number (DMK), Job Name, Quantity, Value, Despatch Date and Status. 3

Before contacting Ravensworth about your order please check the Order Status report.

Users can also see a report based on quantity of orders and value per template type.

Managers reports include:
• Quantity and Value by User - report to show all orders by user. Filter on Username, Surname and Branch or by all (including no order ones).
• Quantity and Value by Campaign and Template - Shows the quantity and value of all orders by Campaign and Template. Adjust the Date Range to see information on orders placed by Campaign in that time period.
• Quantity and Value all orders - report will allow you to filter on multiple scenarios: Filter on specific users (or all users), specific template types (or all templates). Tick to include Merchandise orders and/or SMS orders. As well as showing different charge types.
You can filter on the date range for your report. If you select both Users and Templates a date range of less than 1 month will display results per day. A date range exceeding 1 month will display results per month. You can view the report on Screen or download to Excel.
• User Logins – Shows who has been using Marketing Toolkit





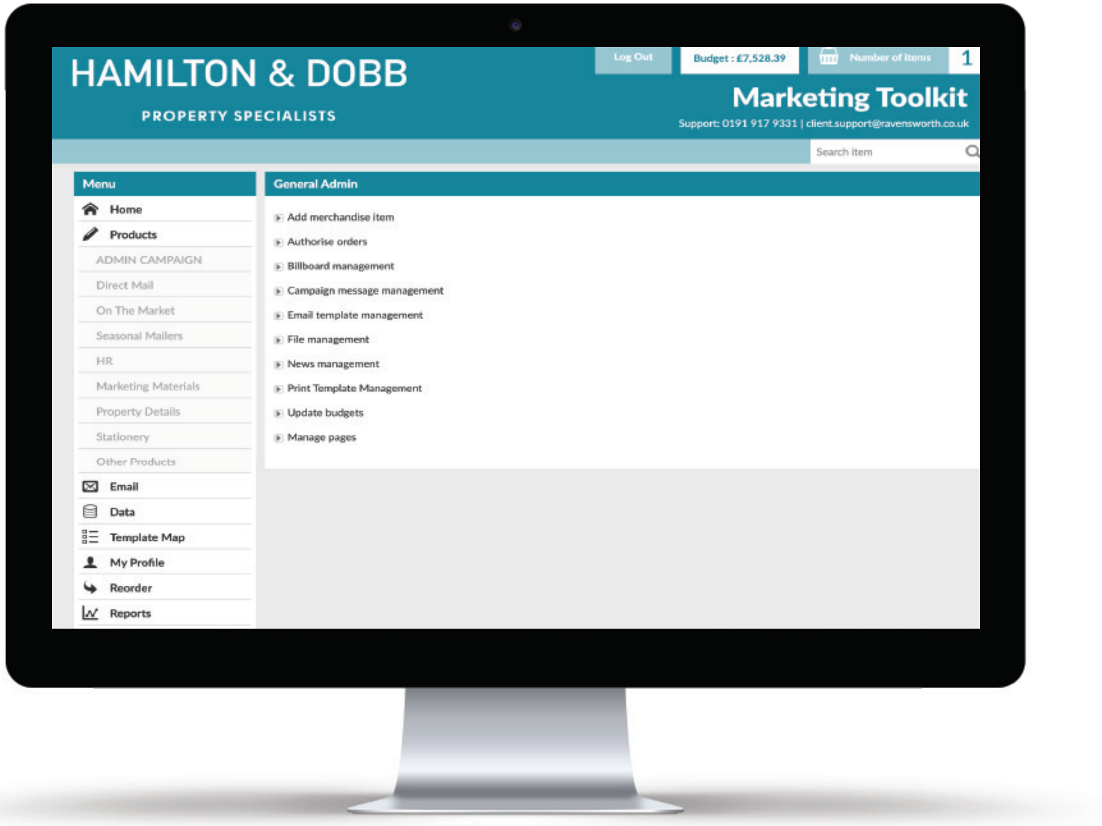
For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Administration - General admin

Overview of users

There are two types of users: General and Admin. We will discuss these roles with you before setting up the account.

- **Products** - Admin users will have the ability to add a template to the carousel on your home page.
- **Templates** - When building templates, we can set a template to admin only so it is only visible to an admin users, to allow the admin user to approve the template before it is available to all users.
- **Reporting** - admin users will be able to see all manager reports.
- Authorising orders - As an admin user you can authorise any orders.
- Billboard management - admin users can update the billboard, add new graphics, build links and delete old versions. You can choose to limit the billboard to specific groups (the groups you add to users to when you create a new user).
- Campaign message management - When users go to create a new campaign, you can set the message that they will see. Go to general admin, campaign message management.
- News management - admin users have the ability to add, edit and delete news stories, which appear in the news feed on the homepage.
- User admin - As an admin user , you can create, modify or delete and existing user.



Administration - General admin

Authorising orders

Some orders require a Manager's authorisation before printing. Go to 'GENRAL ADMIN' 1 then cick 'AUTHORISE ORDERS' 2 to see a list of orders awaiting authorisation. Orders can be viewed, edited, approved or rejected. You can filter by date, user first name, surname and order number (DMK).

NOTE! Orders can be delayed if they are not approved quickly. Check the order status report. 'Authorising' means that an order has not been approved and cannot be processed.

Billboard management

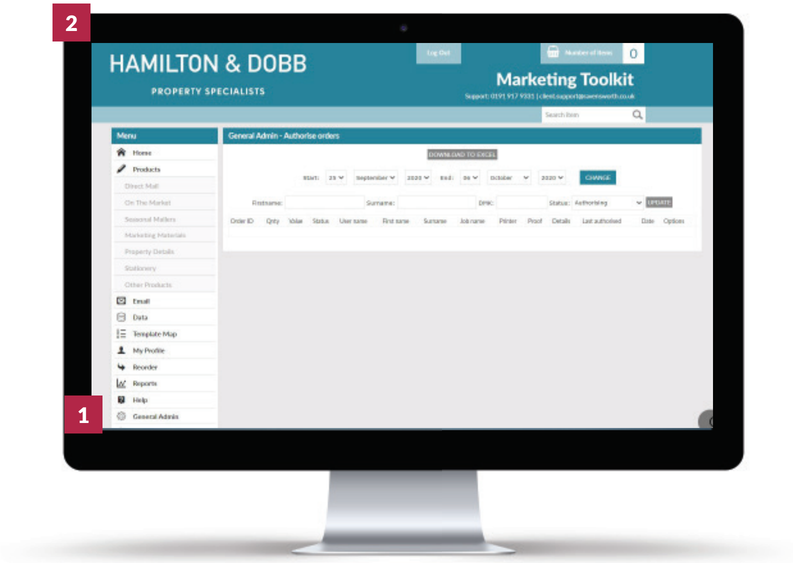
The billboard appears on all users homepage when they first log in to Marketing Toolkit. Create new billboard messages here. To change the content got to 'GENRAL ADMIN' 1 then click 'BILLBOARD MANAGEMENT.' 3

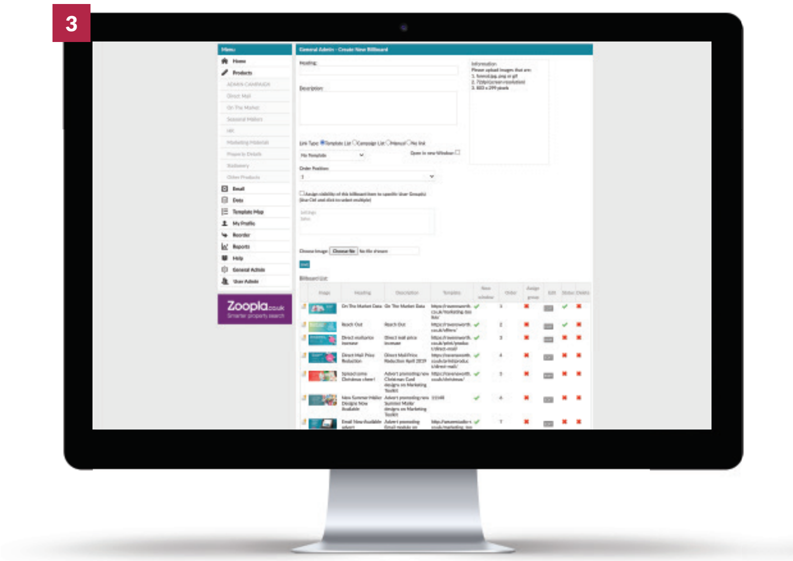
Add in the heading, description and link type and upload an image (recommended size is 803 x 299 px). You can choose to limit the billboard to specific groups (the groups to which you assign new users when you create them).

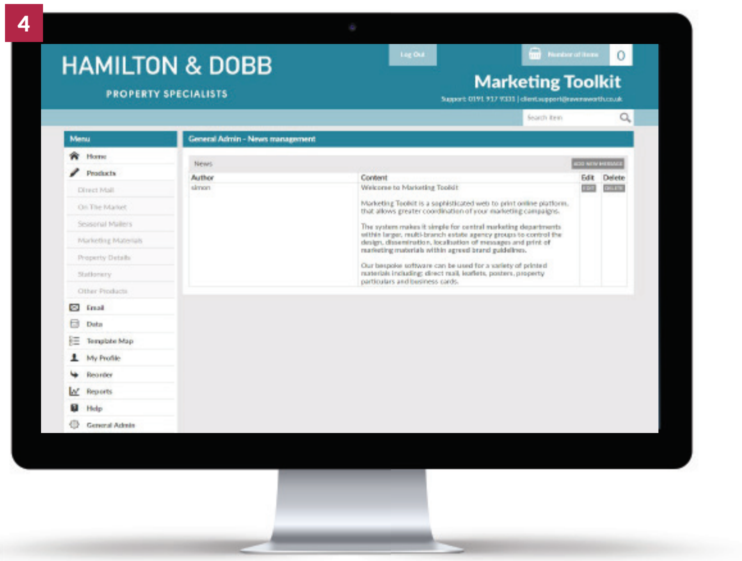
Click "Choose File" to upload your image and click 'Save'. Next, tick the red cross in the status column of your new billboard item. The new billboard item will be shown on the homepage.

News management

Go to 'GENRAL ADMIN' 1 and click 'NEWS MANAGEMENT'. 4 Click here the click 'Add New Message', 'Edit' or 'Delete'. After making changes to your content, click 'Save'. Your new message will be displayed to all users in the news pane on the homepage.







For more in-depth information please visit our Knowledge Centre, accessible from the 'Help' tab

Campaign message management

When users go to create a new campaign, you can set the message that they will see. Go to 'GENRAL ADMIN' 1 and click 'CAMPAIGN MESSAGE MANAGEMENT'. 2

Select your campaign from the drop-down menu. Add your text in and click 'Save'. Your message will be shown to all users.

File management

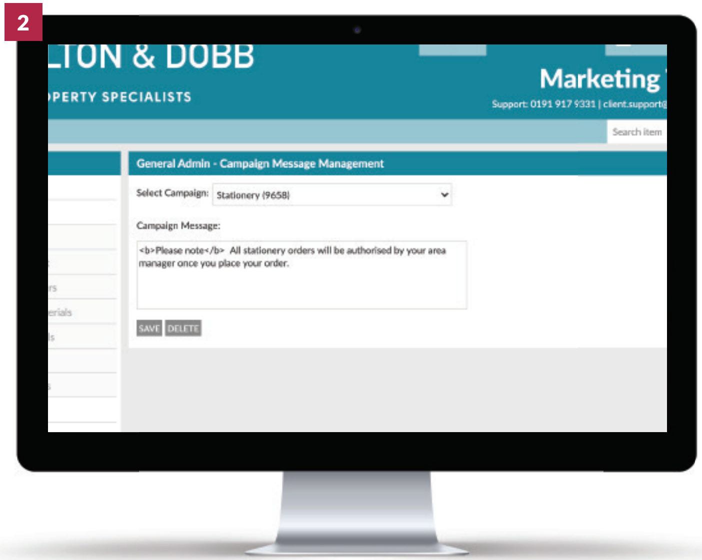
Control the files available on the document download area of the site. You can add, edit or delete files. Go to 'GENRAL ADMIN' 1 and click 'FILE MANAGEMENT'. 3

Budget control

Allows you to control the budget for a specific user or all users. Go to 'GENRAL ADMIN' 1 and click 'BUDGET CONTROL'. 4

Select a user and enter the new budget value. Click 'Update' to complete the update.

2



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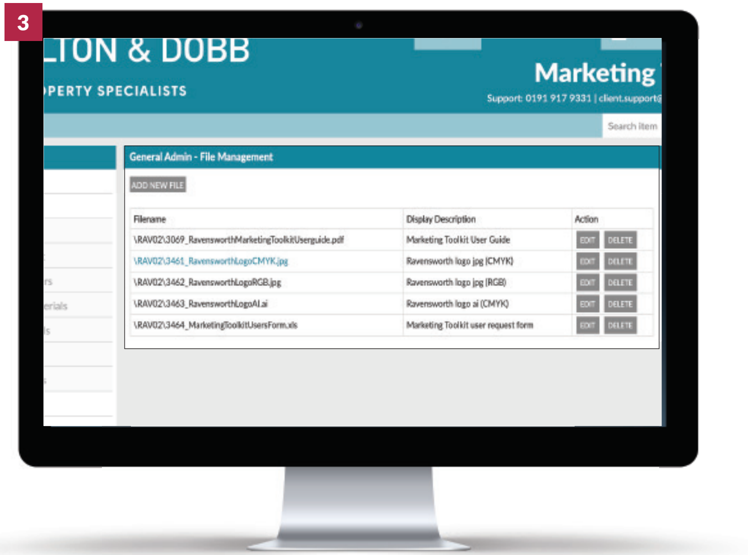

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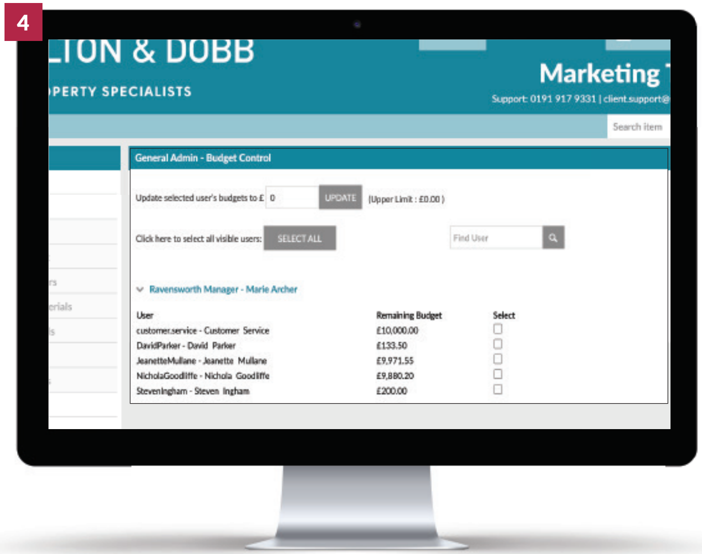

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Administration - user admin

User admin

Go to ‘USER ADMIN’ 1 and choose:

Create a new user 2

Click create a new user. Fill-in the form making sure that you fill-in all of the required Fields. Some of the information added here is accessed by our templates (e.g. contact details).

Be sure to pass on the login details to your new user. You can modify their details or the user can update their own profile later. You can set permissions and access levels directly from this menu.

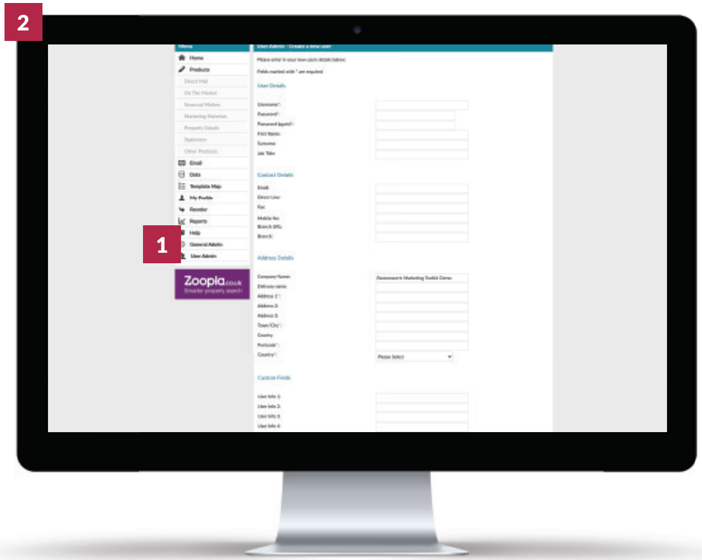
Modify an existing user 3

Search for or select an existing user from the list. You will be shown their current account details. Make your changes then click ‘Save’.

Delete an existing user 4

Choose a user from the drop-down list. Type in a reason (e.g. “No longer works for company”) and press ‘Delete’. Click ‘Yes’ to confirm.

2



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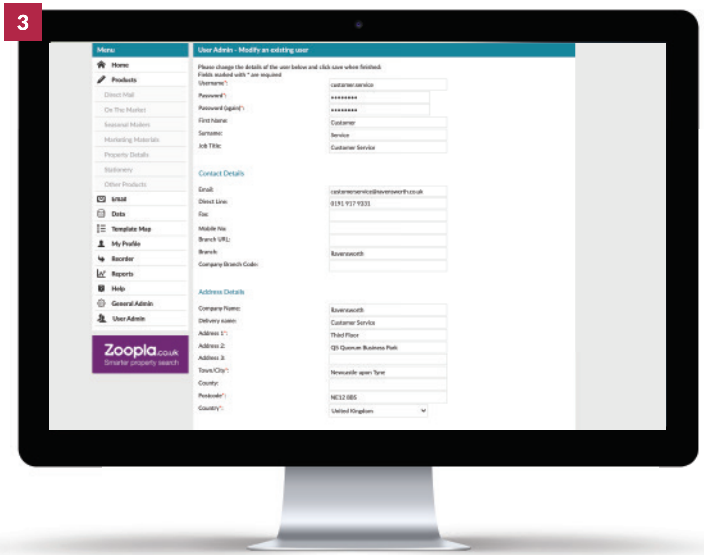

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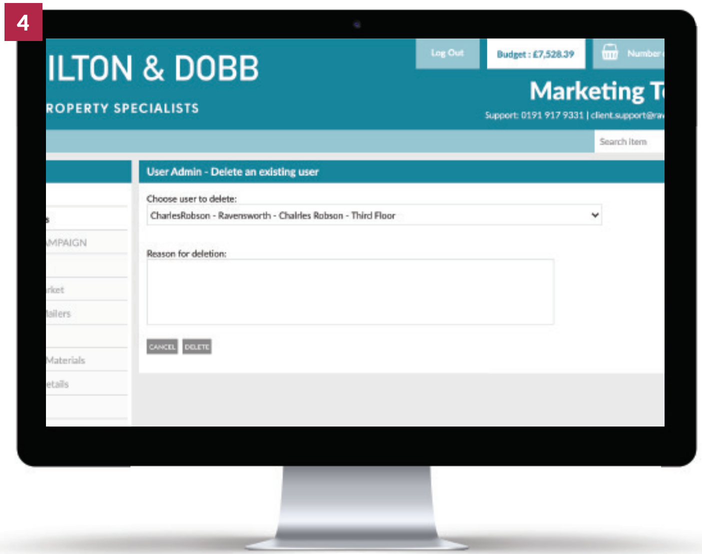

For more in-depth information please visit our Knowledge Centre, accessible from the ‘Help’ tab

Call: 0191 9179331

Email: client.support@ravensworth.co.uk

ravensworth.co.uk