

 **RAVENSWORTH**

**CUSTOMERS CANVAS  
and  
TOOLKIT™ USER GUIDE**

**L** | LEADERS

**ROMANS** 

# WELCOME

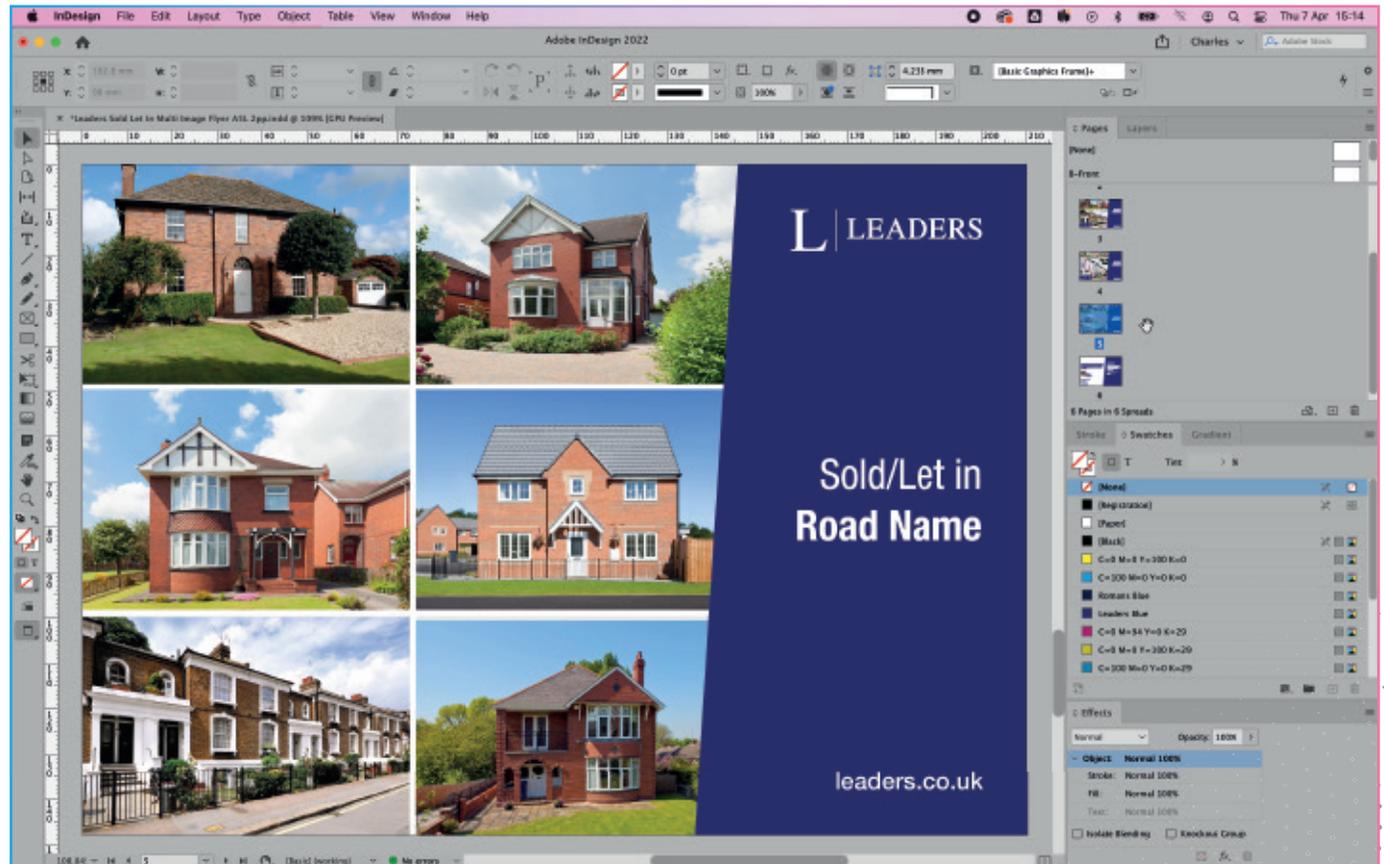
## About this guide

Users can now create their own editable templates using Adobe™ InDesign™ and upload them into the Toolkit™ system.

Using specific tags set within the 'Layers' panel of each document, every page element can be controlled, edited and populated using these templates within the familiar Toolkit environment.

The following is a brief visual description of the process of preparing your designs for use within the system.

A major benefit of this method is that your artworks still live within the standard everyday design environment and can be used for other stand alone projects. They haven't been converted to a bespoke proprietary filetype - they are still Indesign files...



# SYSTEM REQUIREMENTS

## System requirements

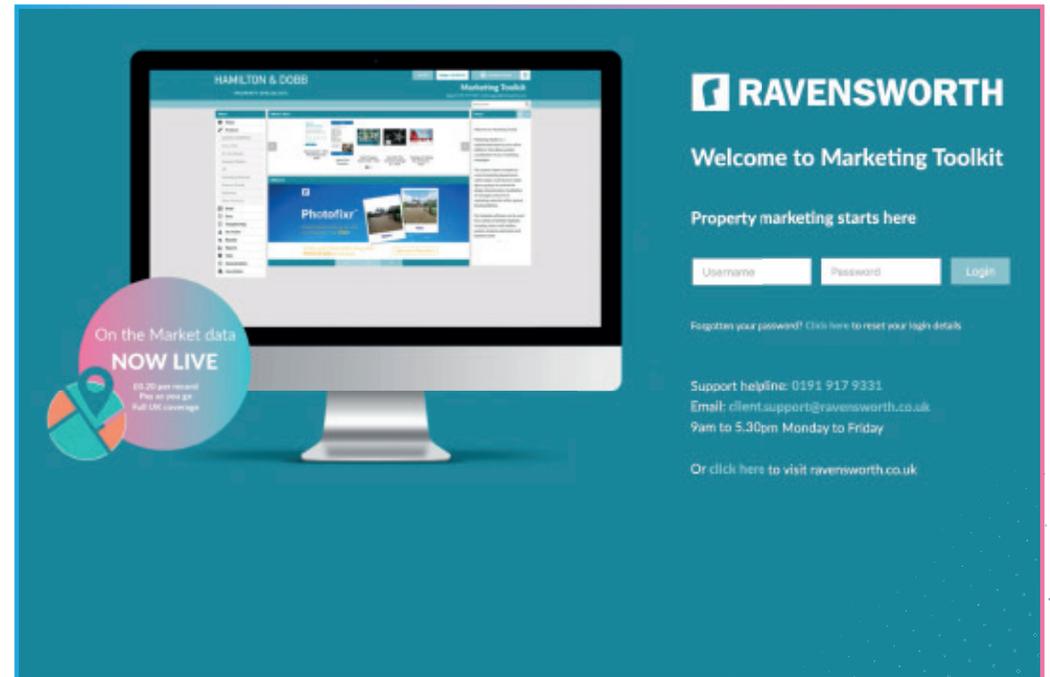
Adobe™ Indesign™

Adobe™ fonts cannot be packaged from Indesign, so alternative fonts must be used.

The system database requires file names to have a limit of 34 characters and without any spaces. Dashes and underscores are recommended:

Leaders\_Sold-Let-In\_Multi\_A5L\_2pp has 33 characters.

Naming your final design from the start of this process is less complicated than trying to rename multiple files at the end of the template preparation process.



# ARTWORK PREPERATION

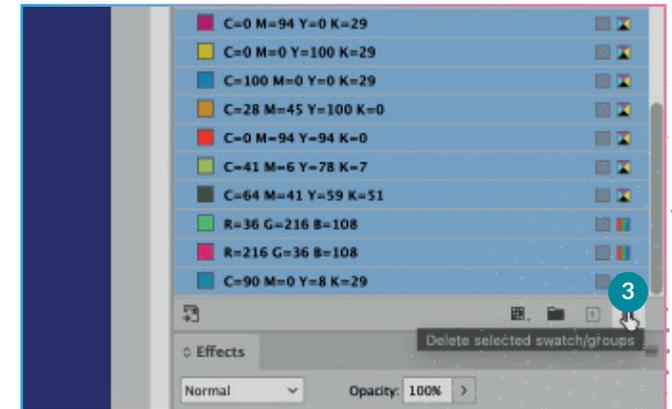
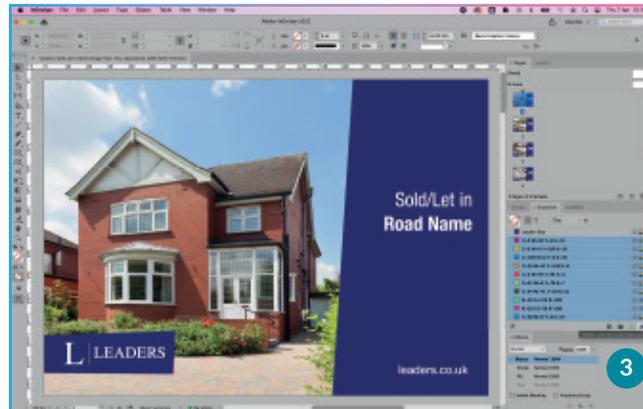
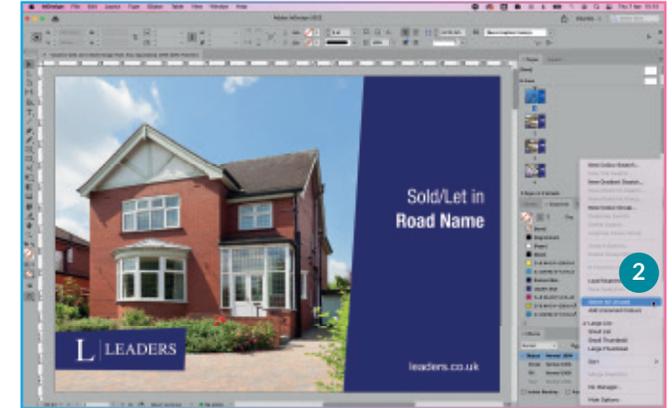
## Prepare your Indesign files

Once you have your designs created, the final stage is to remove any unused elements from pasteboards and clean up any unused colours throughout the document.

From the Colour Swatches tab, click the hamburger to the top right of the panel, then choose 'Add Unnamed Colours' **1**, this will add any colours not added to the swatch when copying elements from other designs you've previously worked on.

Next, select 'Select All Unused Colours' **2** then click the bin icon **3** to remove any unused colours from the document.

All colours must be converted to CMYK.



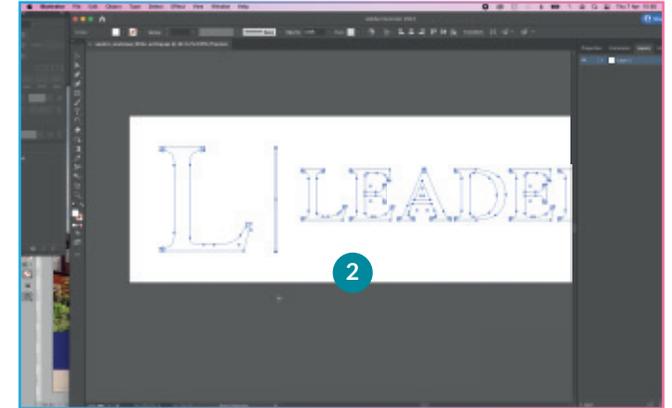
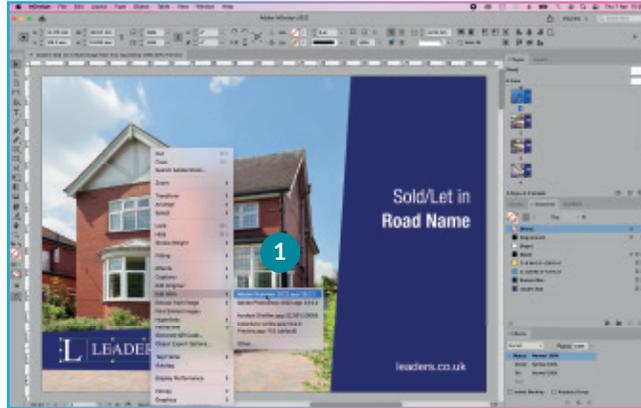
# ARTWORK PREPERATION

## Replacing static logos

This template example has a static brand logo on the front, and in this case it's better to 'bake' the logo into the artwork, as only the text and property images will ever be changed by the end user.

(There are variable dynamic options available to use for your brand logos within your templates, this will be explained elsewhere).

To convert the logo from a placed graphic, open it with Illustrator **1**, select all, copy all **2** and paste this directly into Indesign, creating an outlined version of your logo **3**.



# INSERTING MARKER 'TAGS'

## Adding Marker Tags to objects

Every item created in an Indesign document is added within the Layers panel when it is created or pasted in from an existing document.

To control what happens to these elements in a template, specific 'Marker Tags' are used to tell the software what type of container or graphic element it is and what can be done with it.

The image rectangle shown here has the default of <gettyimages\_xxx.jpg> **1**

This needs to be changed to:

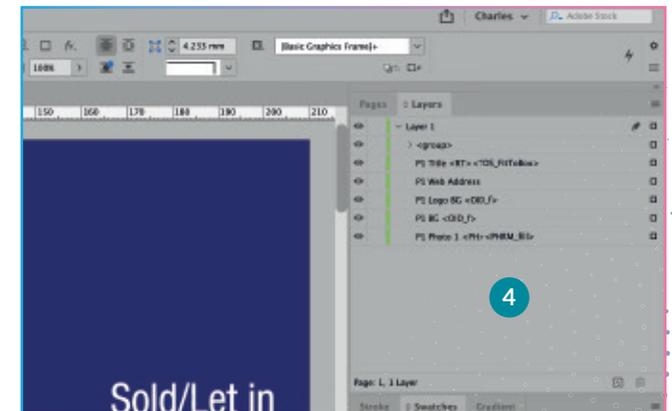
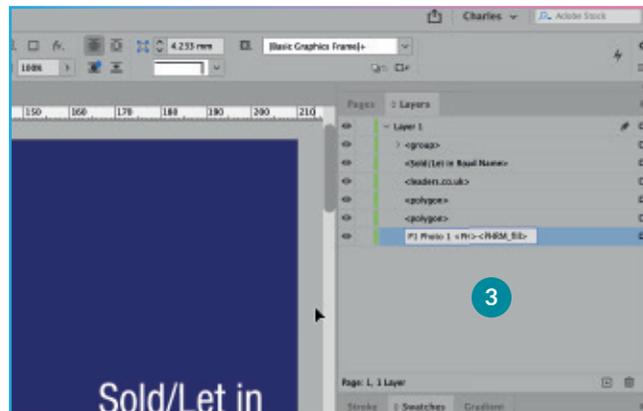
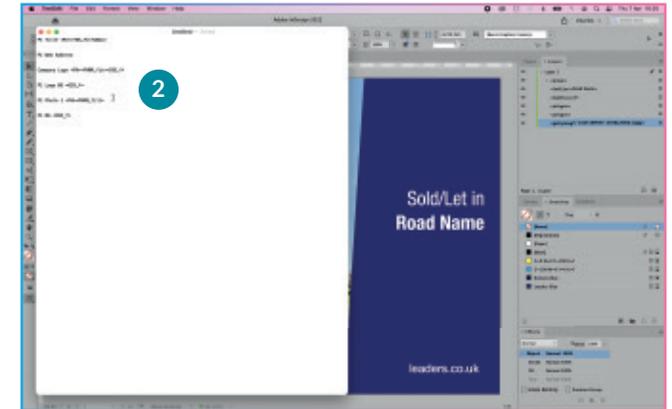
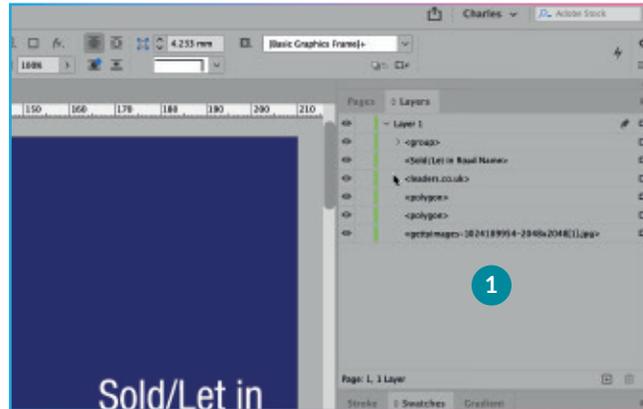
P1 Photo 1 <PH><PHRM\_fill> **2**

allowing the software to know it contains an image.

Triple-click the existing layer name to highlight it, **3**, then paste (or type) the required 'tag' in its place:

P1 Photo 1 <PH><PHRM\_fill> **4**

A full list of the Marker Tags you require will be supplied at the end of this guide.



# CREATING MULTIPLE LAYOUT OPTIONS

## Creating the other layouts

Once all the Marker tags have been created, shift-select each one, then 'Group' them and give them a name of '1 Image'.

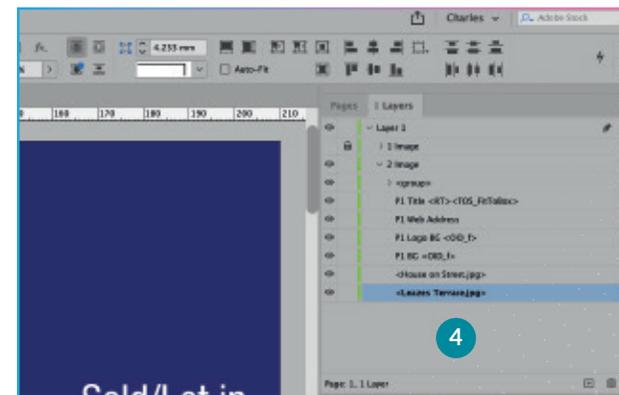
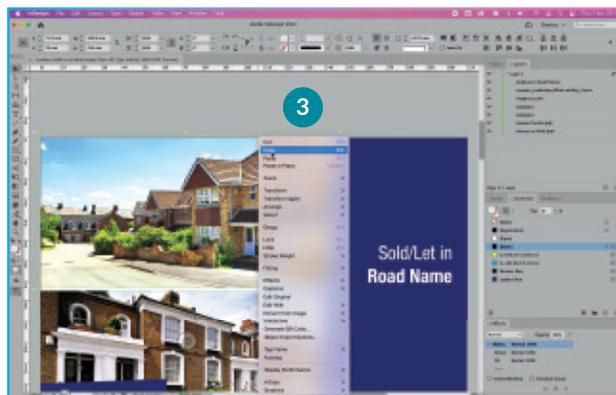
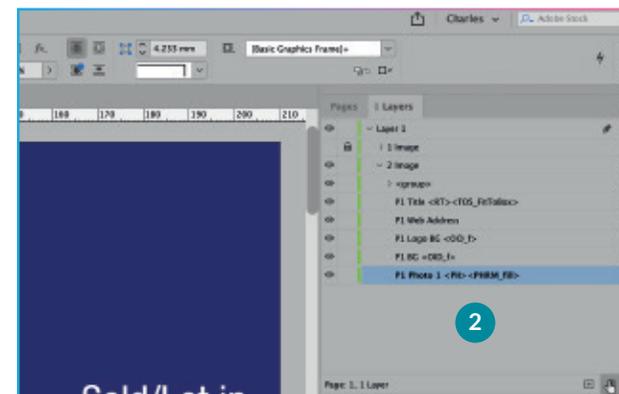
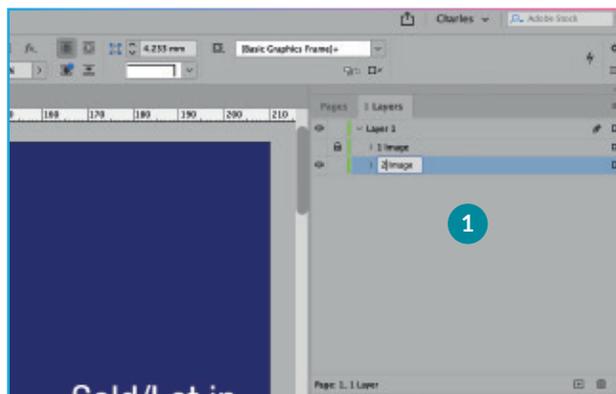
Duplicate this 'set', lock and hide the '1 image' set and start on the next version/layout (locking and hiding prevents deleting the wrong image set).

Rename this new set to '2 Image', **1** expand its contents and delete the 'P1 Photo 1 <PH><PHRM\_fill>' element **2**

From page 2 of the document copy both the images, **3** move back to page 1 and 'paste in place' (Edit > Paste in place), the images (they must have exactly the same position and layer order as they had on page 2).

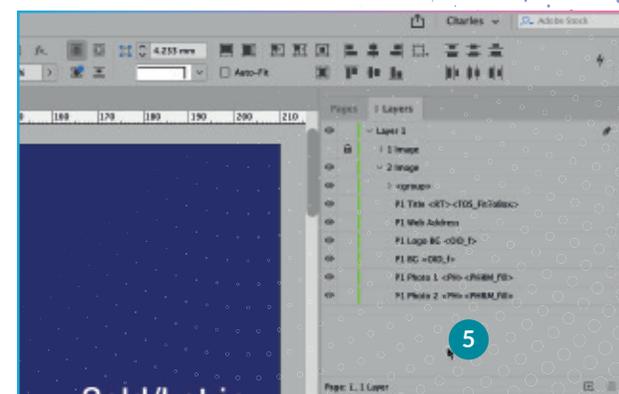
In the layers panel, move these images into the '2 images' set, **4** then rename these as:

P1 Photo 1 <PH><PHRM\_fill> and  
P1 Photo 2 <PH><PHRM\_fill> **5**



## NOTE

Check the image place holders stacking order is correct, as InDesign can swap these when moving elements from one page to another - select the layers name, right-click - select item(s) - it will show you where it appears on the page, within the layers panel, move items to the correct order if required.



# CREATING THE REMAINING LAYOUTS

## Creating the other page layouts

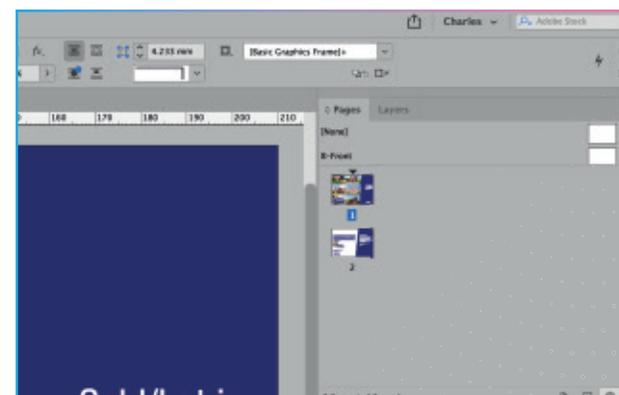
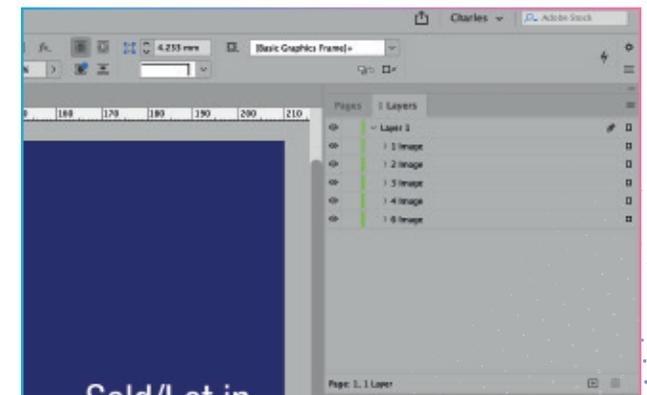
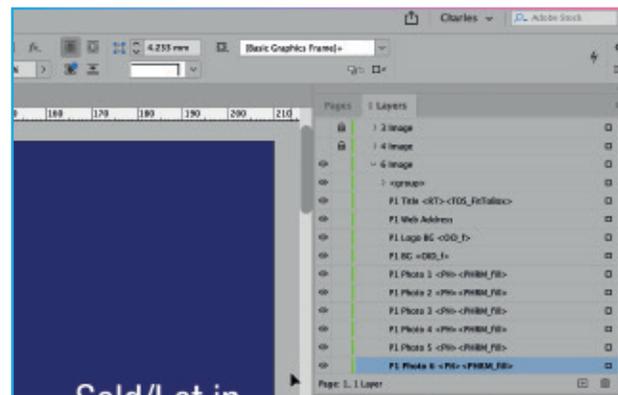
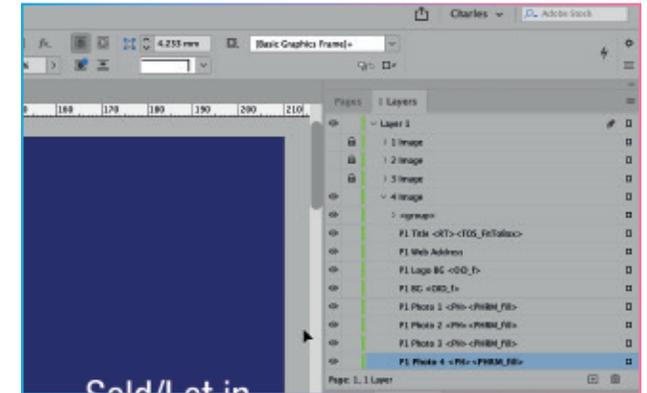
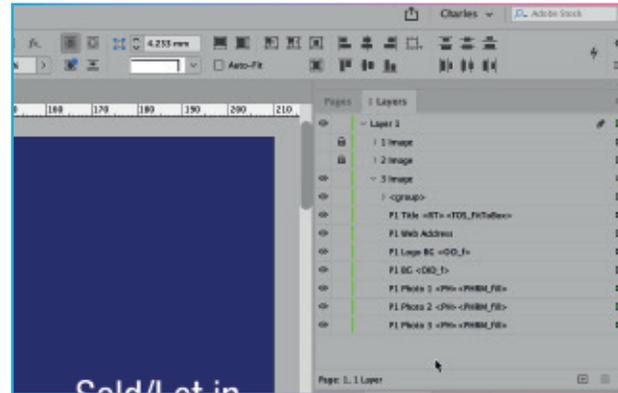
The rest of the layout options are created in the same way, each time they will require another image placeholder and be named as required.

Briefly...

Duplicate the previous 'X Image' set, lock and hide the one before, delete the existing image placeholder(s), copy the next set of image boxes from the relevant page, 'paste in place', move into the correct 'image set', check their order, rename as required, lock and hide...

Once all 'image sets' are created you can unlock and unhide all the image sets.

Once the multiple layouts for the front page are created, you can delete the 'design pages' as their content is no longer needed, leaving just the front and back pages.



# PAGE 2

## Back Page Tags

For Page 2, follow the same process...

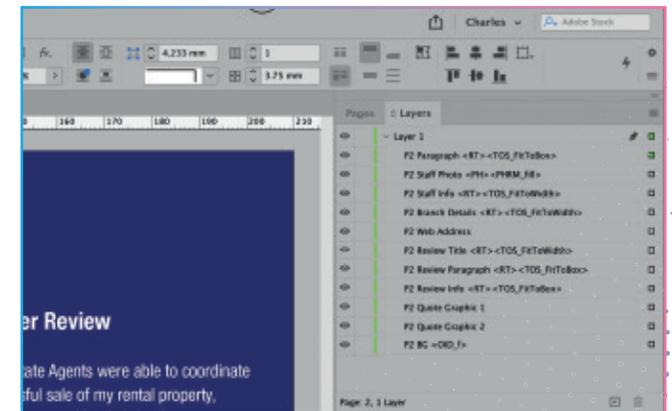
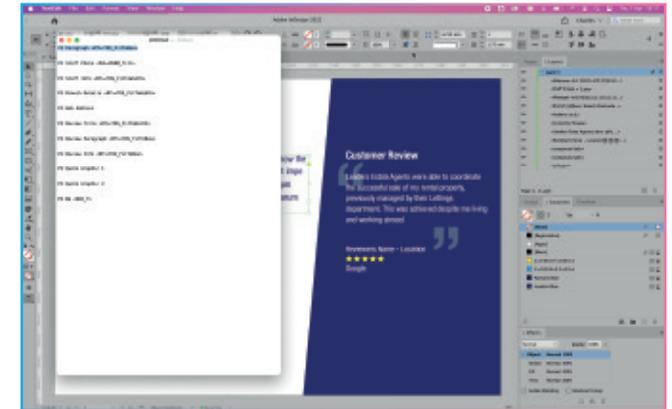
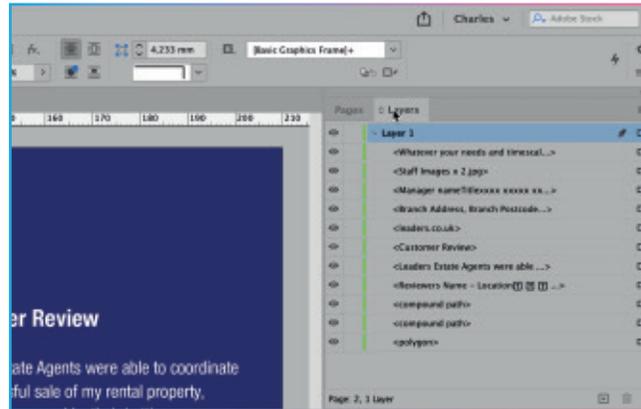
Although there are no different layout options, the procedure is the same.

Each element must have its own 'tag' applied, these can be overtyped or 'copy and pasted' from the supplied list.

As there are no multiple layout options on page two in this example, so there is no need to group and rename into a layer set.

### NOTE

The 'P2 Web Address' element is static and has no system or user action, so does not require a 'tag'. The same applies for the P2 Quote Graphic 1 and P2 Quote Graphic 2, but naming them helps to identify them later in the template editor if required.



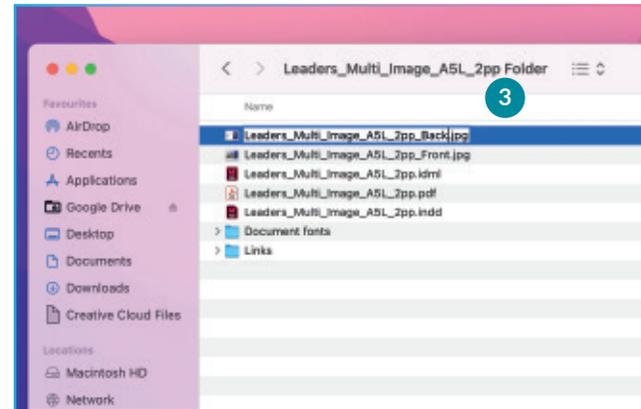
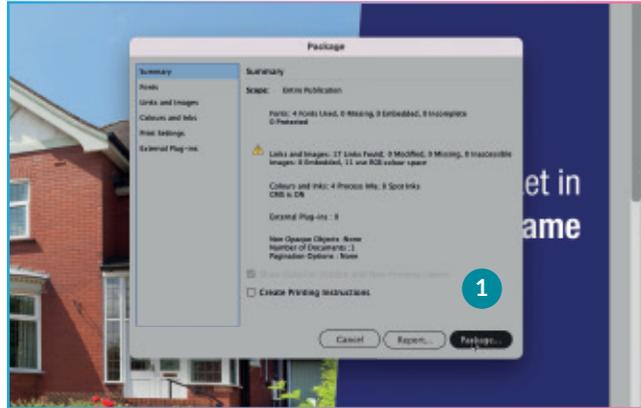
# PACKAGE AND CREATE TEMPLATE PREVIEWS

## Packaging the template

Package the artwork to a location on your local drive **1**

Into this packaged folder create the Front and Back page previews by exporting as a .jpg, using the quality settings shown here **2**

Change the default filenames to end with \_Front.jpg and \_Back.jpg **3**



The template creation process is now finished.

# REQUIRED 'MARKER TAGS'

## Page 1

P1 Title <RT><TOS\_FitToBox>

Front page text that shrinks to fit the place holder

P1 Logo BG <OID\_f>

Background shape containing the logo

P1 BG <OID\_f>

Background shape containing the Sold/Let

P1 Photo 1 <PH><PHRM\_fill

Image place holder for featured image

## Page 2

P2 Paragraph <RT><TOS\_FitToBox>

Paragraph text

P2 Staff Photo <PH><PHRM\_fill>

Staff photo

P2 Staff Info <RT><TOS\_FitToWidth>

Staff details that reduce in size when the edge of the textbox is reached

P2 Branch Details <RT><TOS\_FitToWidth>  
Branch details

The following text that MUST be included within the textbox itself - this allows the branch information to be loaded dynamically when the individual branch logs in:

[#varBranch\_FullAddress]

[#varUser\_Info\_02]

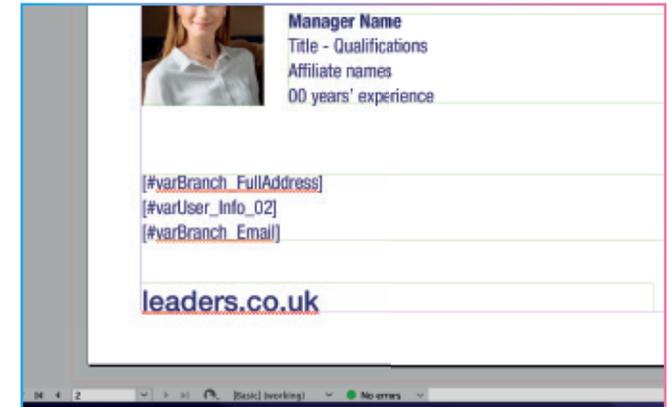
[#varBranch\_Email]

P2 Review Title <RT><TOS\_FitToWidth>  
Review title

P2 Review Paragraph <RT><TOS\_FitToBox>  
Review text

P2 Review Info <RT><TOS\_FitToBox>  
Reviewers details and rating

P2 BG <OID\_f>  
Background shape containing the review



P1 Title or P2 Staff Photo can be changed to something more logical relating to each design or layout as they have no effect on the system and are for user identification only.

**The <Marker\_Tags> and the [#varTags] are system critical and must be entered exactly as shown.**

# UPLOAD TO TOOLKIT™

## Upload to Toolkit™ and set who has access to this template.

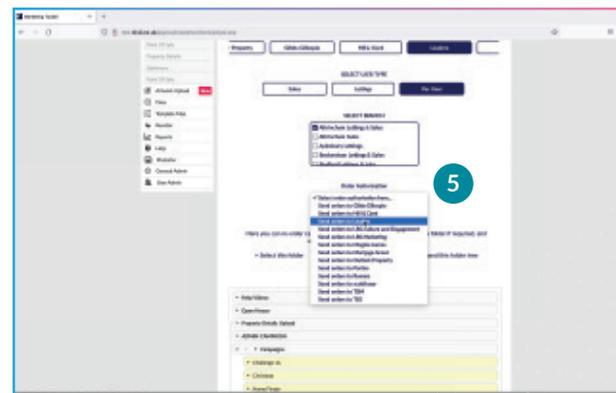
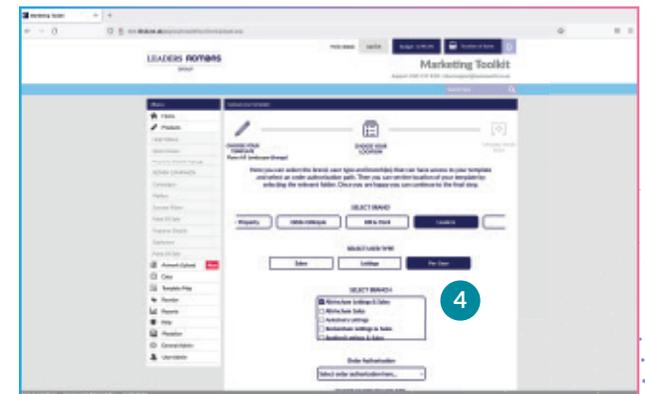
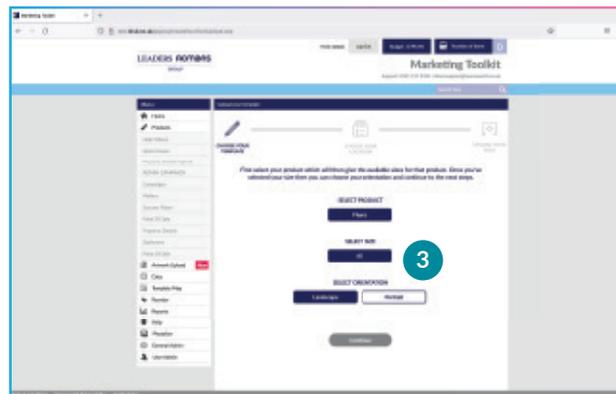
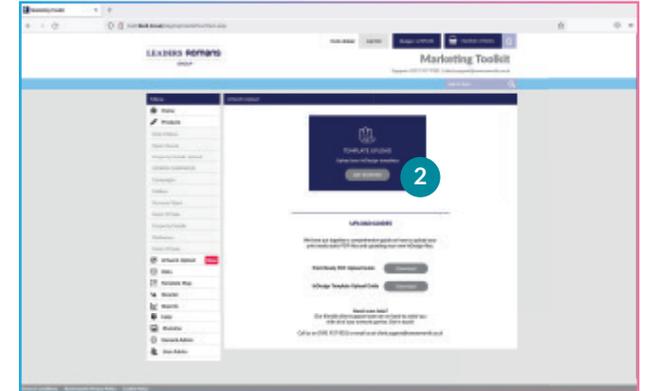
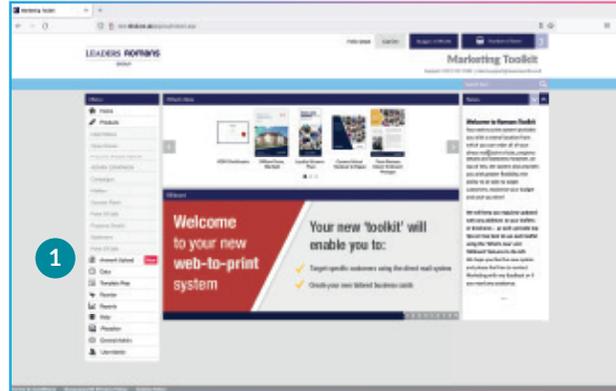
Login to Toolkit as usual, in the left menu you will see a NEW Artwork Upload link **1**

This takes you to the Template upload section.

Click 'Get Started' **2** this will load the Product Selection page, choose Flyers > A5 >Landscape, then Continue **3**

Choose which Brand has access to this template, which specific type of user, Sales, Lettings or ALL, or per individual user **4**

Next specify the 'Order Authorisation' from the dropdown list **5**



# CREATE A CAMPAIGN FOLDER

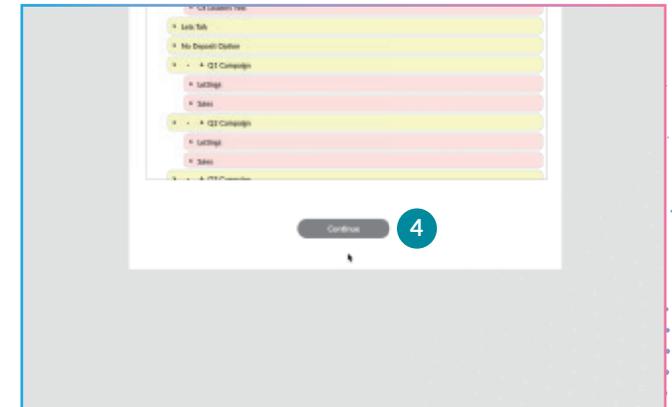
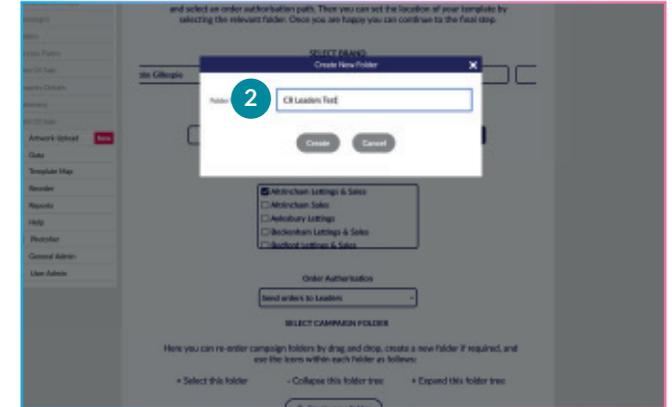
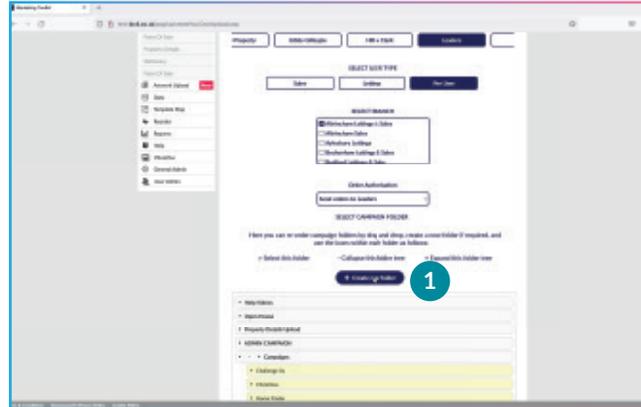
## Create and move campaign folders

You can either select an existing campaign folder or click 'Create New Folder' **1**

Name the folder as required **2**

Drag this new folder to the campaign folder of your choice **3**

Click continue to upload the template to this location **4**



# UPLOAD A TEMPLATE

## Upload template elements

Give the template a name **1**

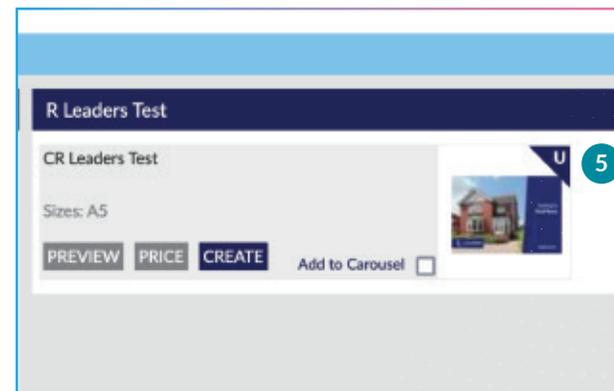
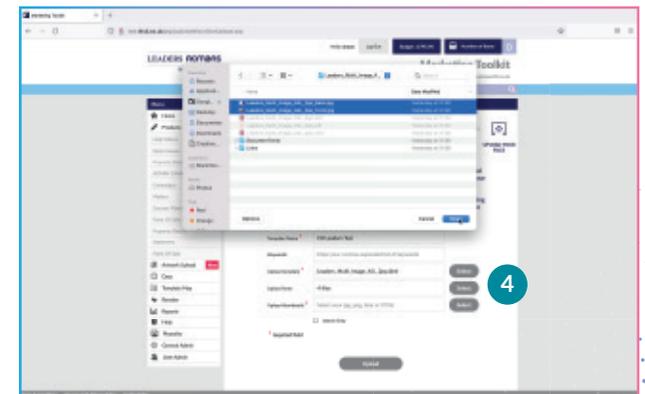
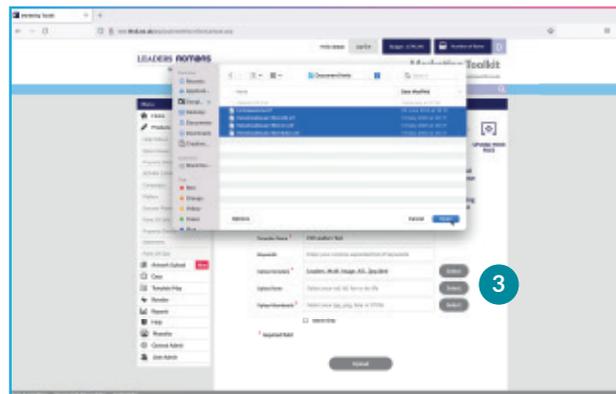
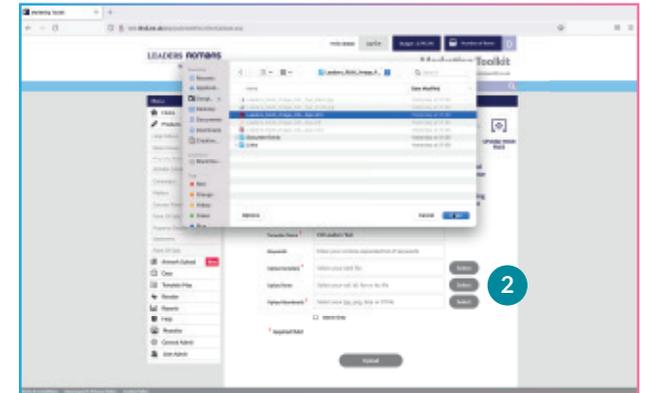
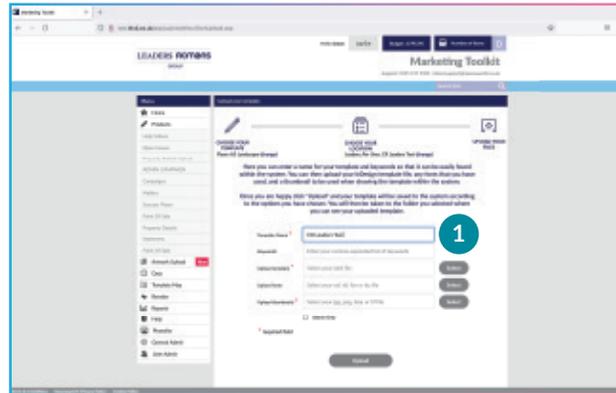
Select the template .idml file **2**

Select the template fonts **3**

Select the template previews **4**

### NOTE

User uploaded templates indicated by the U Corner triangle **5**



# END USER FLYER CREATION

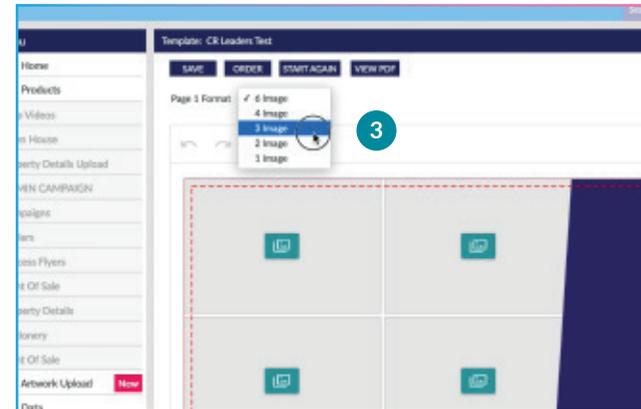
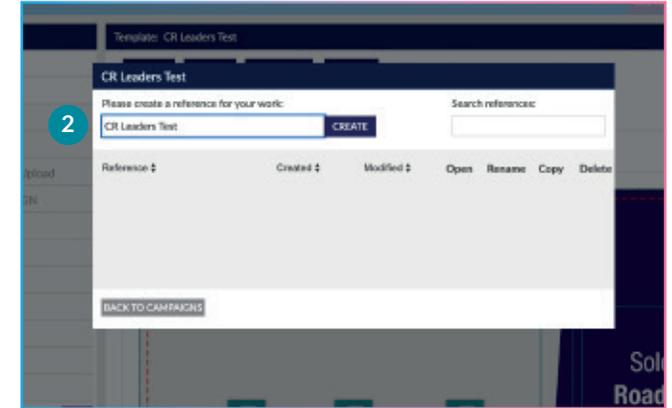
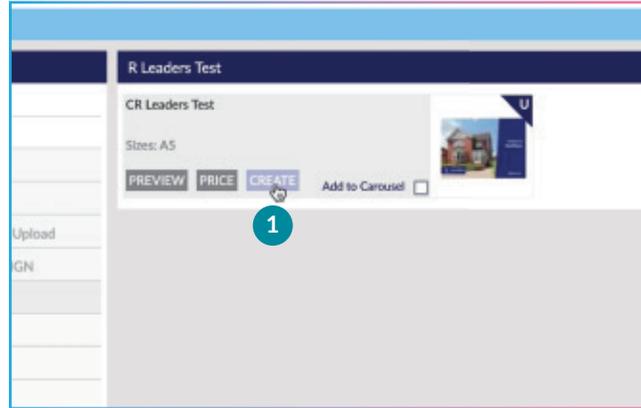
## Create and populate a flyer

End users with access to the template can now create and populate a version with their local details, images and information that can be sent to print.

Click 'CREATE' **1** to begin the process of creating a flyer from the template.

Name the specific flyer **2** click 'CREATE'

Choose which layout option **3** from the dropdown you want to use.



# ADDING IMAGES

## Adding images and graphics

Click the image place holder icon **1**

Click the insert images icon **2**

Choose a previously uploaded image **3** or click the 'upload' link **4**

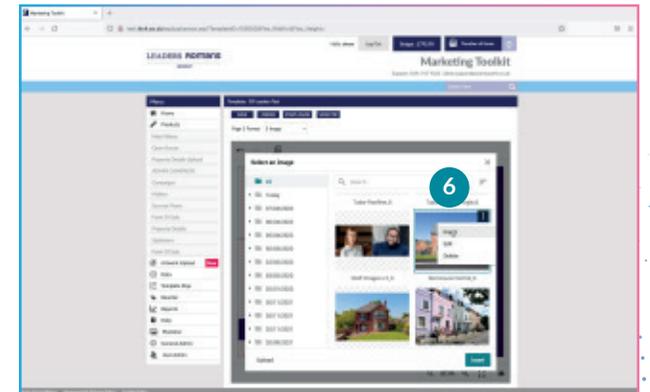
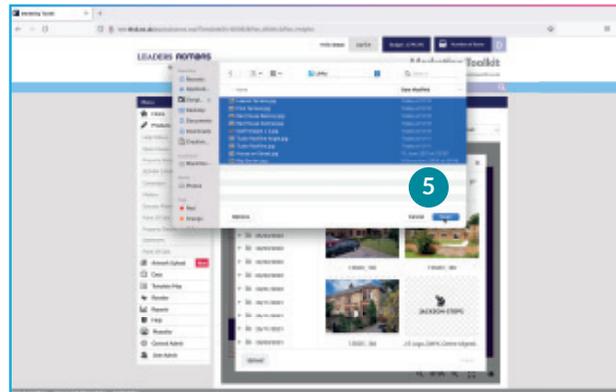
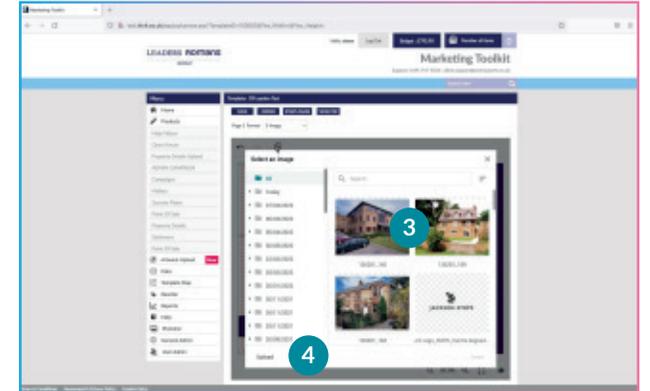
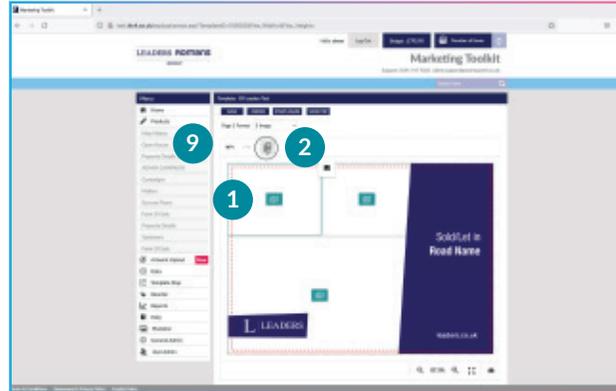
They can choose from 'Today' or previous dates to choose the images.

Select image(s) **5** click 'open'.

Once the images have finish uploading, select an image and click 'insert' **6**

Click the 'hand' **7** icon to adjust position and size of the image, click the 'tick' **8** once you are finish making adjustments.

Throughout the whole process, any changes can be undone by clicking the 'undo' icon to go back one step at a time **9**



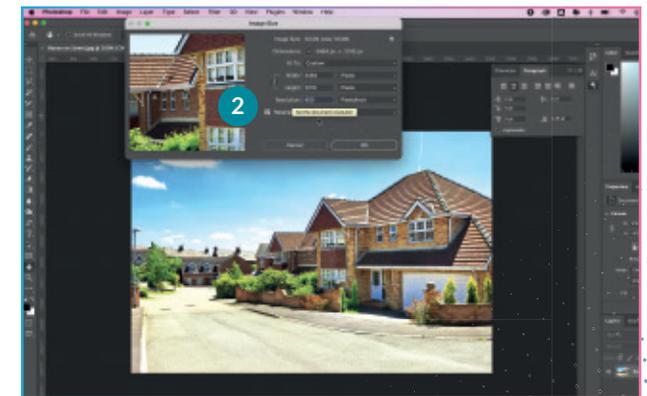
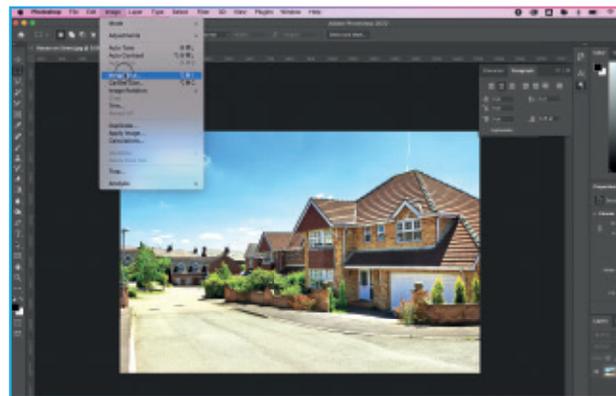
# IMAGE QUALITY AND TEXT OVERRUN WARNINGS

## Image quality warnings

The system checks images and graphics are of a printable quality and resolution, with a minimal resolution of 300dpi at final print output - if an error is found a warning triangle with a message appears **1**

A quick fix of image error warnings can be achieved by resampling the images in Photoshop™ (or equivalent) up to a larger physical size or increasing .dpi of an image **2**

Once the image has been re-uploaded and inserted, the error warning triangle will change to a green 'tick' **3** to say this image now meets minimum quality requirements.



## Text overrun warnings

If too much text is added to a text place holder, the system warns and suggests either reducing the amount of text or reducing the font size for it to fit within a text place holder.



# EDITING TEXT 'BASIC EDIT' USER MODE

## Editing text place holders

The system allows for mixed fonts, weights, sizes and colours within one text place holder.

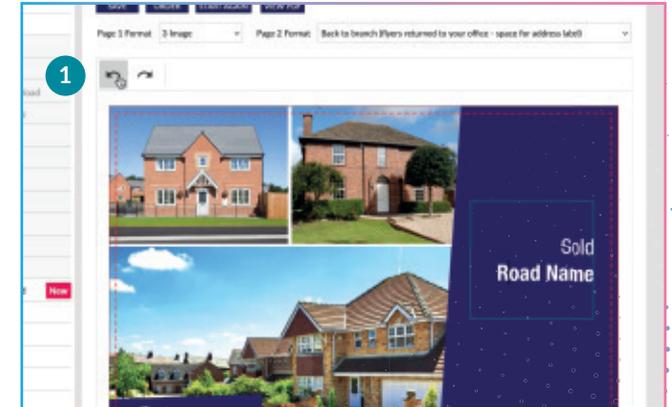
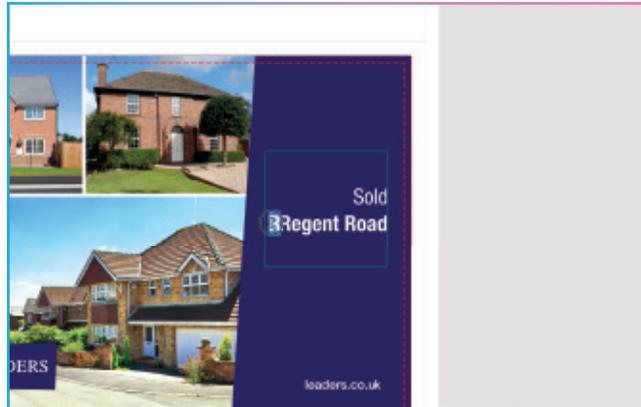
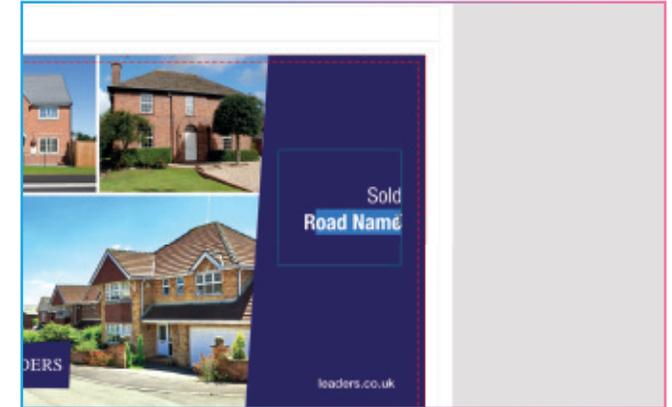
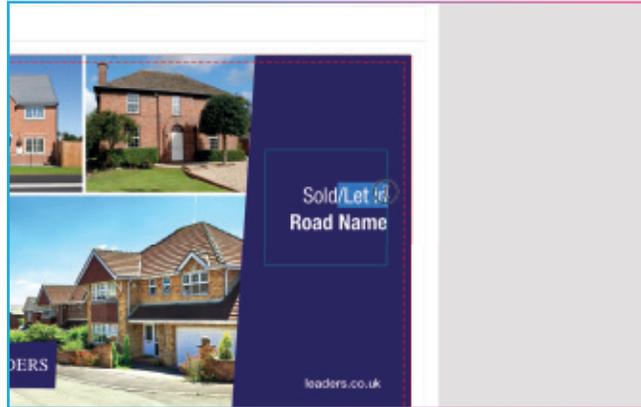
To make text changes, first highlight the contents of a textbox, delete and begin typing to replace the placeholder text.

### NOTE

In 'Basic Edit' user mode, the styling is set by the first style applied to the text place holder and deleting the mixed styled content will remove any subsequent styling - bold or italic or different font weight will be lost.

To retain the designed text styling, it is advised to highlight only part of the text (leave the first letter) and overtype, then delete the unneeded content, otherwise the styling will default to what has been set initially in the text place holder.

Users that have permissions to use 'Advance Edit' mode don't have any limitations on how they edit text and can apply styling options 'at will' anywhere within a text box.



### NOTE

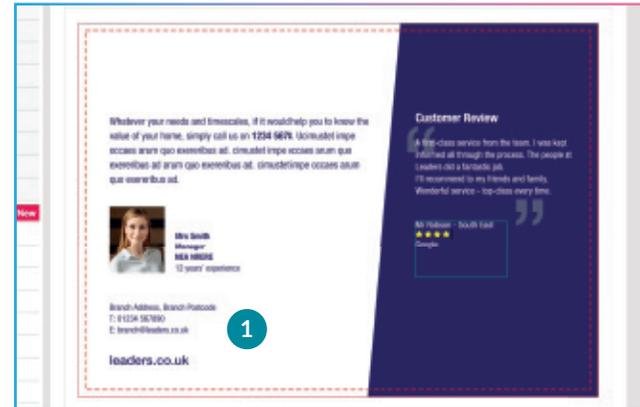
Throughout the whole process, any changes can be undone by clicking the 'undo' icon to go back one step at a time **1**

# DYNAMICALLY LOADED CONTENT

## Dynamic content

The templates can contain dynamically loaded content, in this example the branch information will change depending on which branch has logged into the system and display their branch address, tracking number and email address associated with that branch **1**

The end user is unable to change this content, but can make text and image changes throughout the page as previously shown.



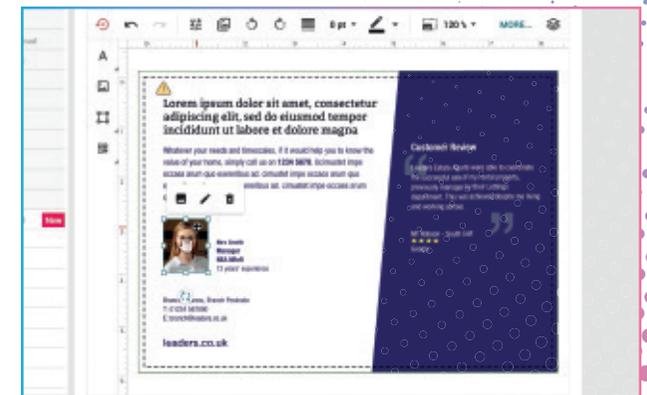
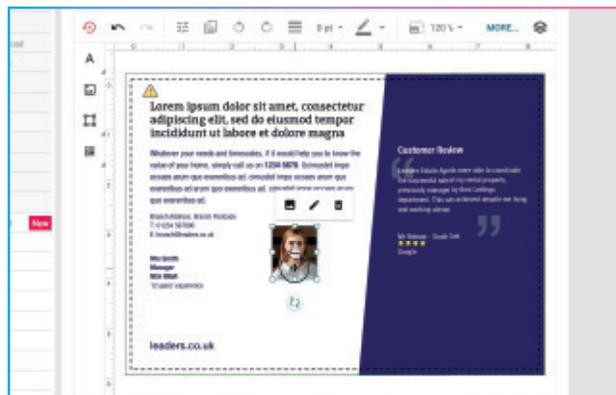
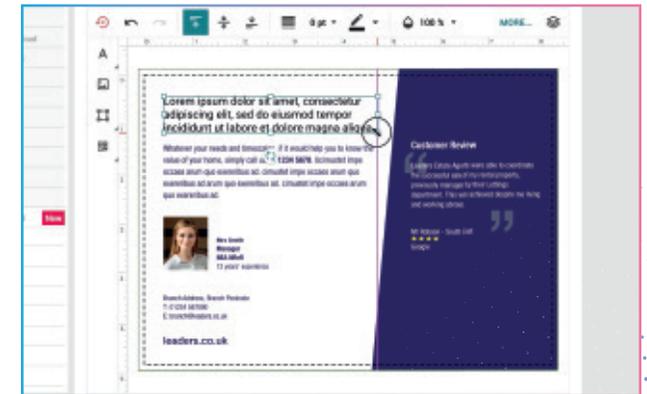
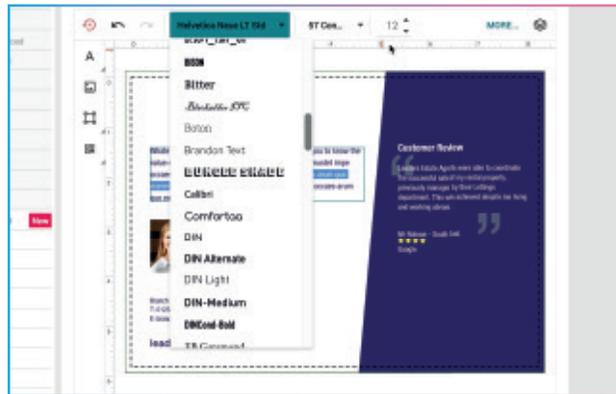
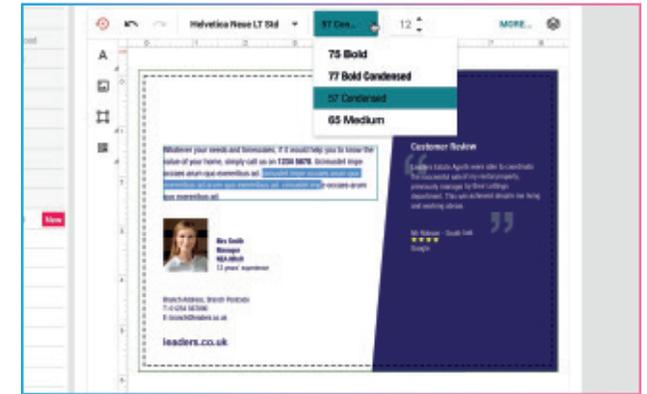
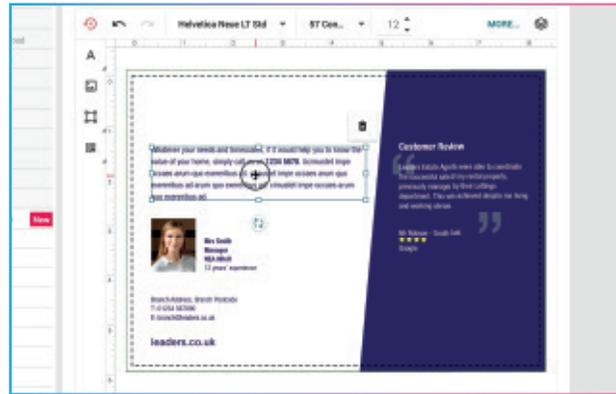
# EDITING IN 'ADVANCED EDIT' USER MODE

## Advanced Editing

In this mode only the Marketing login (and selected users) will have the ability and freedom to delete, move and change every element within the layout - text sizes, weights, colours, positions... remove and delete content, add new shapes and place holders for images, graphics and text.

These users can also create unique layouts based on the initial template... or remove everything and create a bespoke document within this specific campaign folder.

The branches **will not** have access to the Advanced Editing features such as changing colours, fonts, moving elements on the page etc. They will only have access to 'Basic Editing' so that they can upload images and edit text, where allowed.



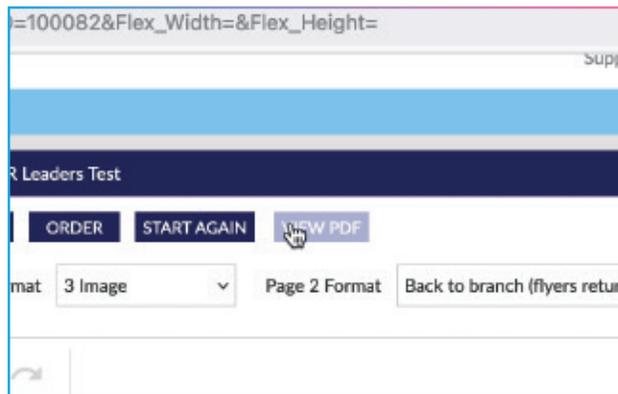
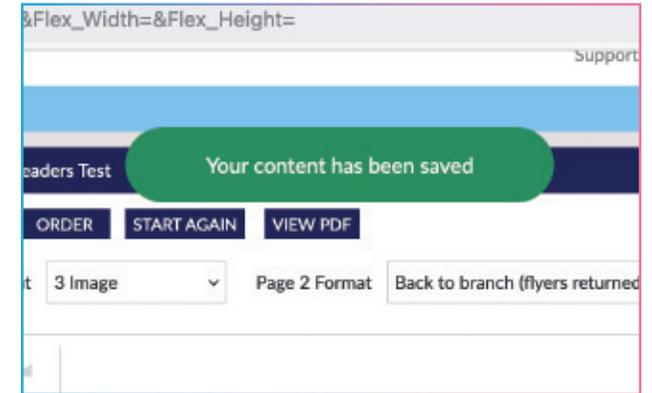
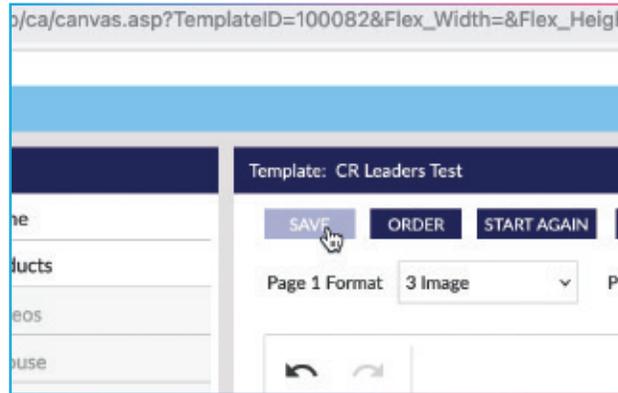
# SAVING THE COMPLETED FLYER

## Saving and viewing a proof

It is highly recommended to frequently save your progress during the population of a flyer.

Once completed, you can view a proof of how your flyer will look before it is sent to print.

Click 'VIEW PDF' to show a screen representation of the final output, to check if you need to make any changes or revisions.



# SEND TO PRINT

## Placing an order

Click 'ORDER' to move to the Order confirmation page **1**

The paper stock and finish have already been set during the initial setup process **2**

Select quantity **3**

Click 'ORDER' **4**

'ADD ORDER TO BASKET' **5**

Confirm delivery address **6** and click on 'ORDER YOUR SHOPPING BASKET'.

