EngineRoom+ tutorial guide

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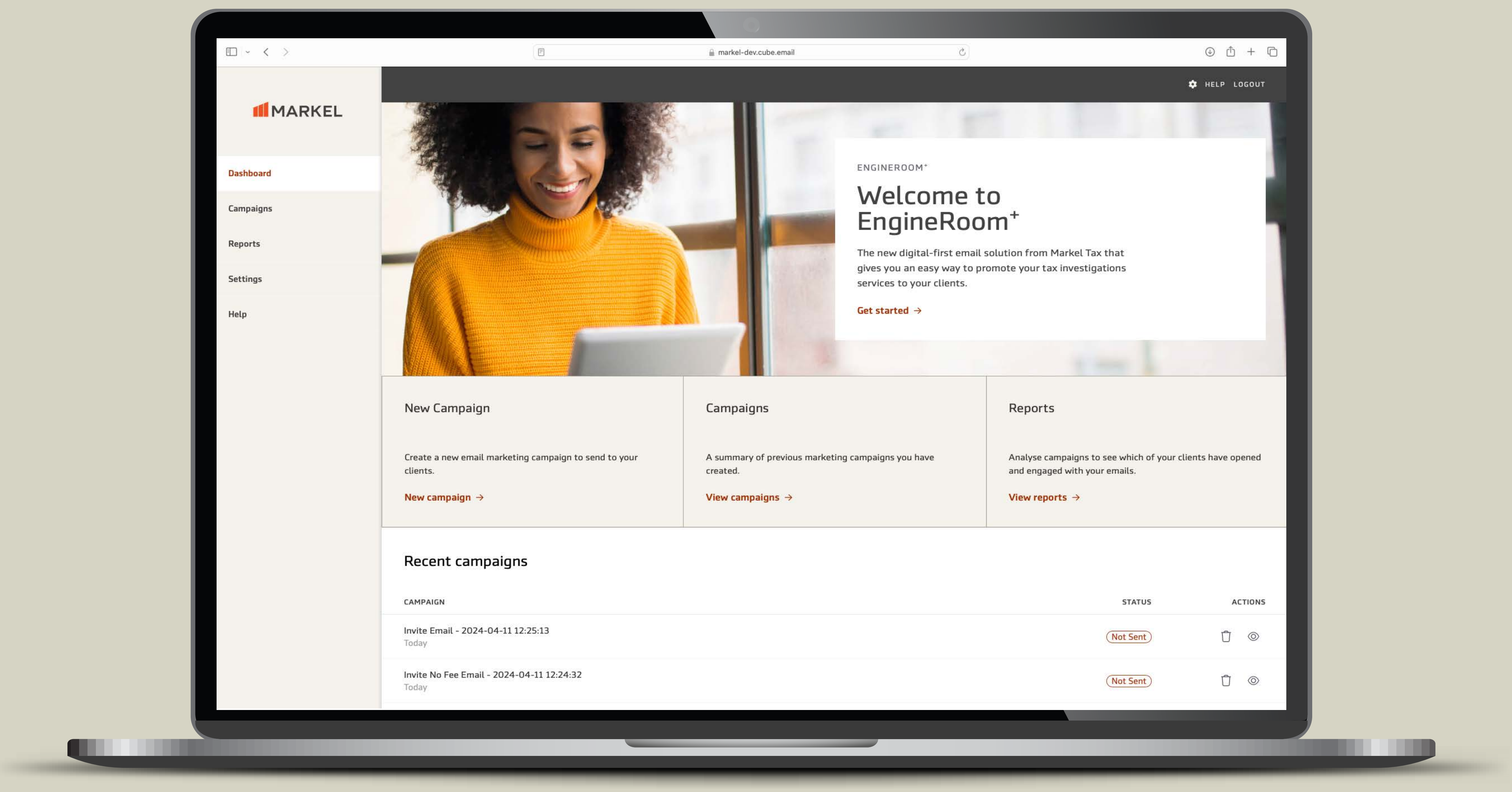
What is EngineRoom+?

EngineRoom+ is the innovative online marketing platform from Markel that helps change how you promote your tax investigations service to clients.

Creating an account is fast and simple. After you've done that, you can set up and plan a campaign in less than 10 minutes.



How to register for an account

You can register for an account by going to: https://engineroom.uk.markel.com/sign-up

You will be asked to complete the following details for your account:

- Name
- Account email address - your log-in details will be sent here
- Company name
- Scheme ID

Once you have completed this, you will need to read and agree to the following terms and conditions:

- Anti-spam policy
- Third-party agreement
- Terms and conditions

After you finish, you need to press the '**check**' button and **submit**.

You will receive an email with your log-in details. Please wait for one working day to get your details. Click the link in the email to finish your registration.

If you have any issues with receiving this email or with registering your account, please contact:

markelsupport@incontrolmarketing.co.uk

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Your first time logging in

You will receive an email detailing your log-in username and password.

It will also include the link to the page where you can log in: https://engineroom.uk.markel.com

Your first time logging in will require you to 'complete set-up'.

Key terms

From sender name:
This is the name that will appear in your recipients' inbox.

From email:
The email address it appears from. Please note: all emails will end **noreply@engineroom.uk.markel.com**.

Reply-to email:
The email address recipients can send their replies to.

Subject line:
The subject of your email campaign e.g., 'Invitation to subscribe to our tax investigations service'.

Pre header text:
The preview of the content that will sit in the email. This commonly sits underneath the name of the sender within your inbox.

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Complete set-up

Completing your set-up is one of the first things we will ask you to do upon entering your account for the first time.

Company details

You can update all of your practice information such as address and telephone number. These will automatically pull through to your campaign template.

Company registration

These are the registered details for your company. If these are the same as your company details, you can tick your box to automatically populate.

Payment

Here you can enter in your payment details to accept payment, either via BACS or the Markel Payment Portal.

Branding

Upload your company logo and select your brand colours to personalise your campaign.

Profile

You can customise your user profile that will appear across your campaigns.

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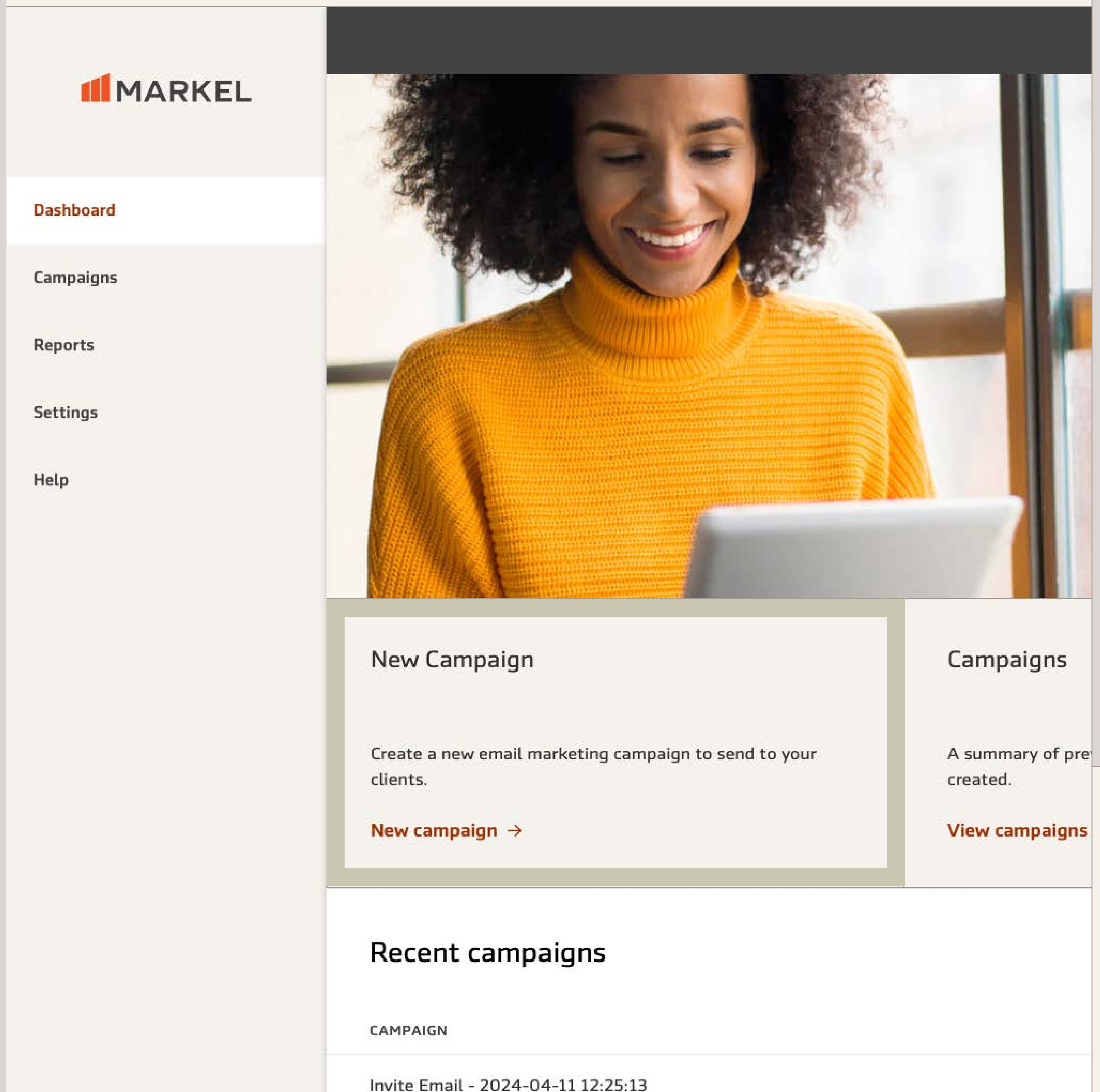
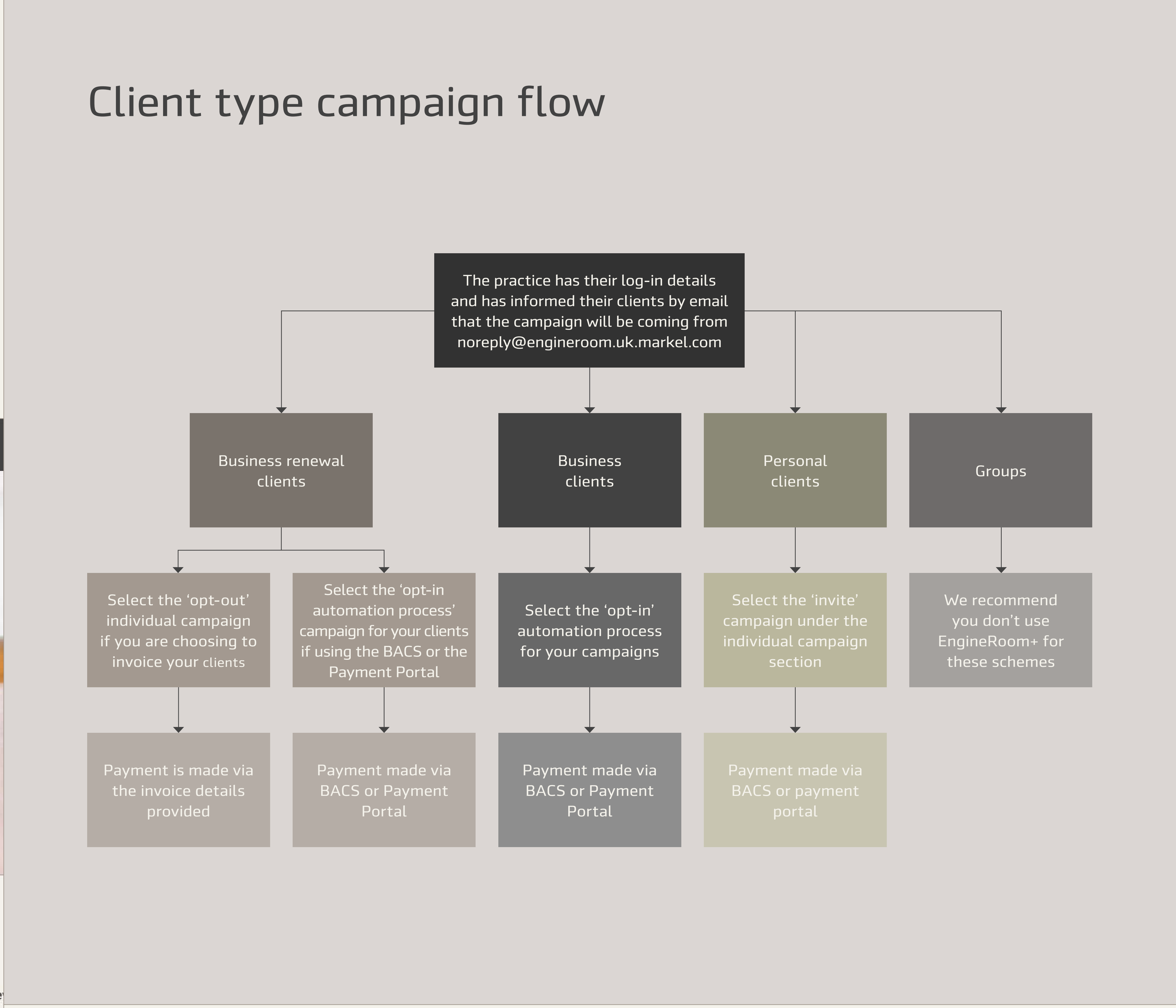
Creating your campaign

On the dashboard, click '**New Campaign**' and select the email template based on the type of client.

Refer back to our FAQ guide to pick the correct campaign.





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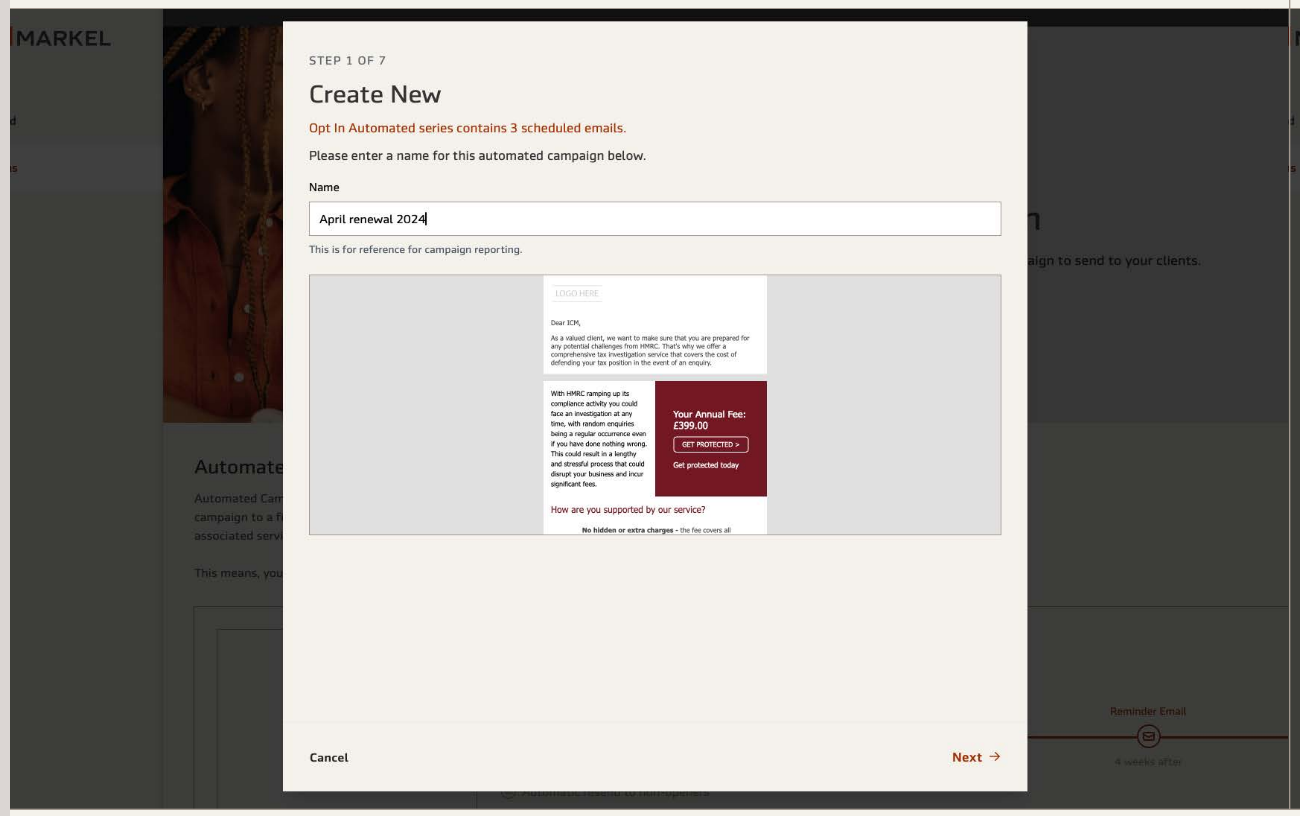
Creating your campaign

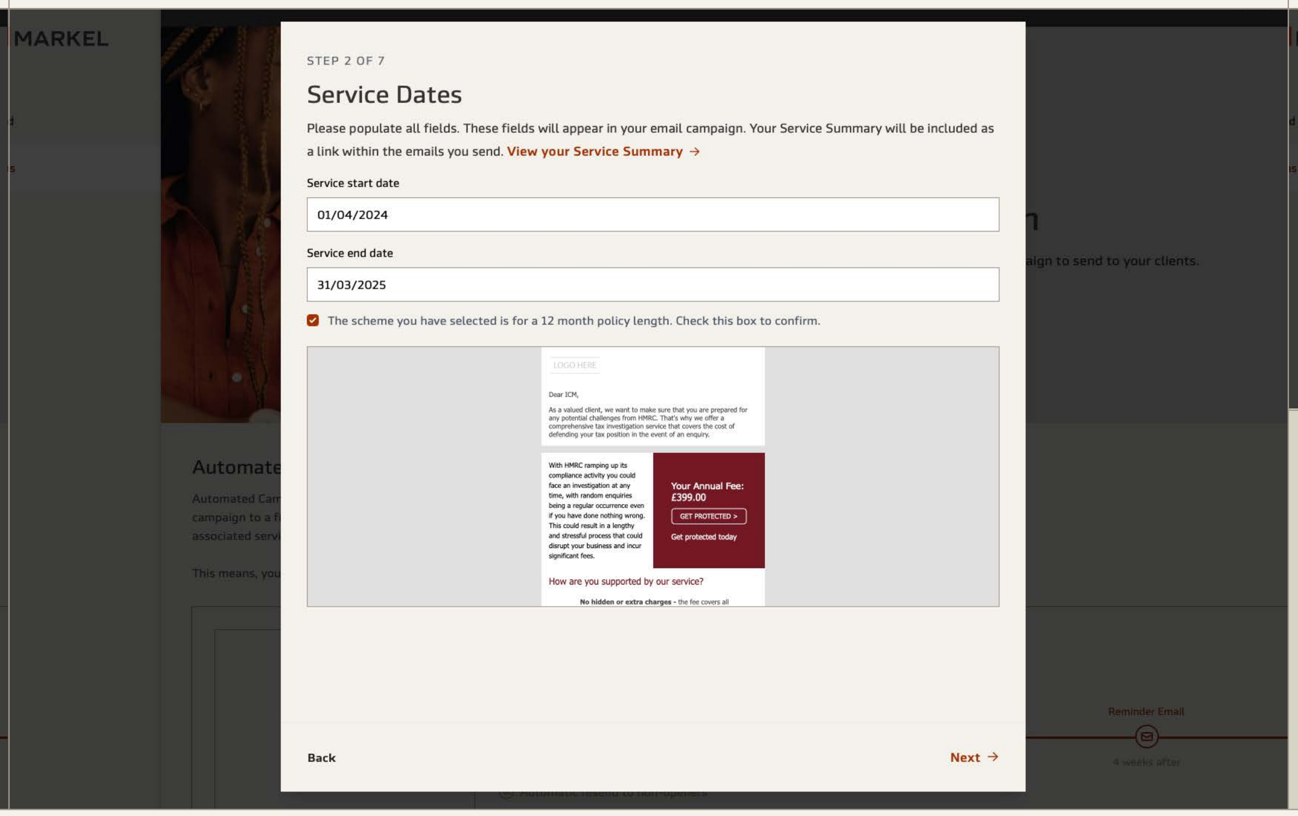
Step 1

The first step is to give your campaign a name – this is for your own reporting. For example: '**April renewal 2024**'.



Step 2

– Select your service start date.
– The service end date will automatically date to 12 months from the selected start date.
– Click the tick box to confirm the policy length.

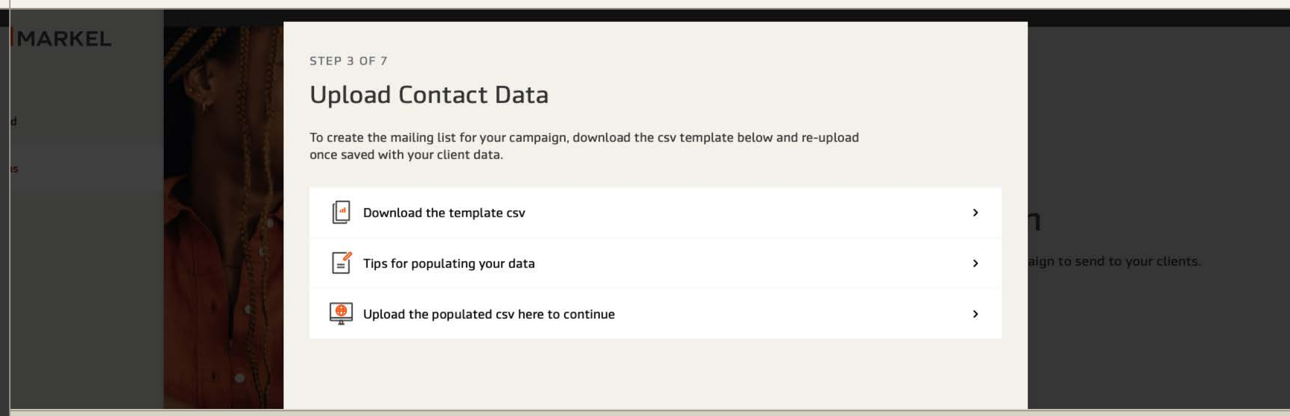


Step 3

Here you can upload the data of the recipients you'd like to send your campaign to. Select '**Download the template csv**'- you will need to format your data into the following:

– First name
– Annual fee amount
– Client Reference number
– Email address
– Entity

Once you have formatted your data into the CSV provided, select '**upload the populated csv here to continue**'.



Tip

Please leave the first row of data in the CSV, this is used as the identifier for each column of data.

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Creating your campaign

Step 4

Once you have uploaded your data, you will be able to review it before approving your campaign.

If any of the rows of data within your CSV are invalid, it will be highlighted red. To progress to the next step, you will need to resolve any rows, unless they are excluded due to being a duplicate.

If one of the rows has been highlighted red, you can select the pen icon to make any amendments to this row of data. If a row is showing as invalid, you may want to check:

– The contact is not a duplicate that has already been recorded in the CSV
– Validity of the email address used

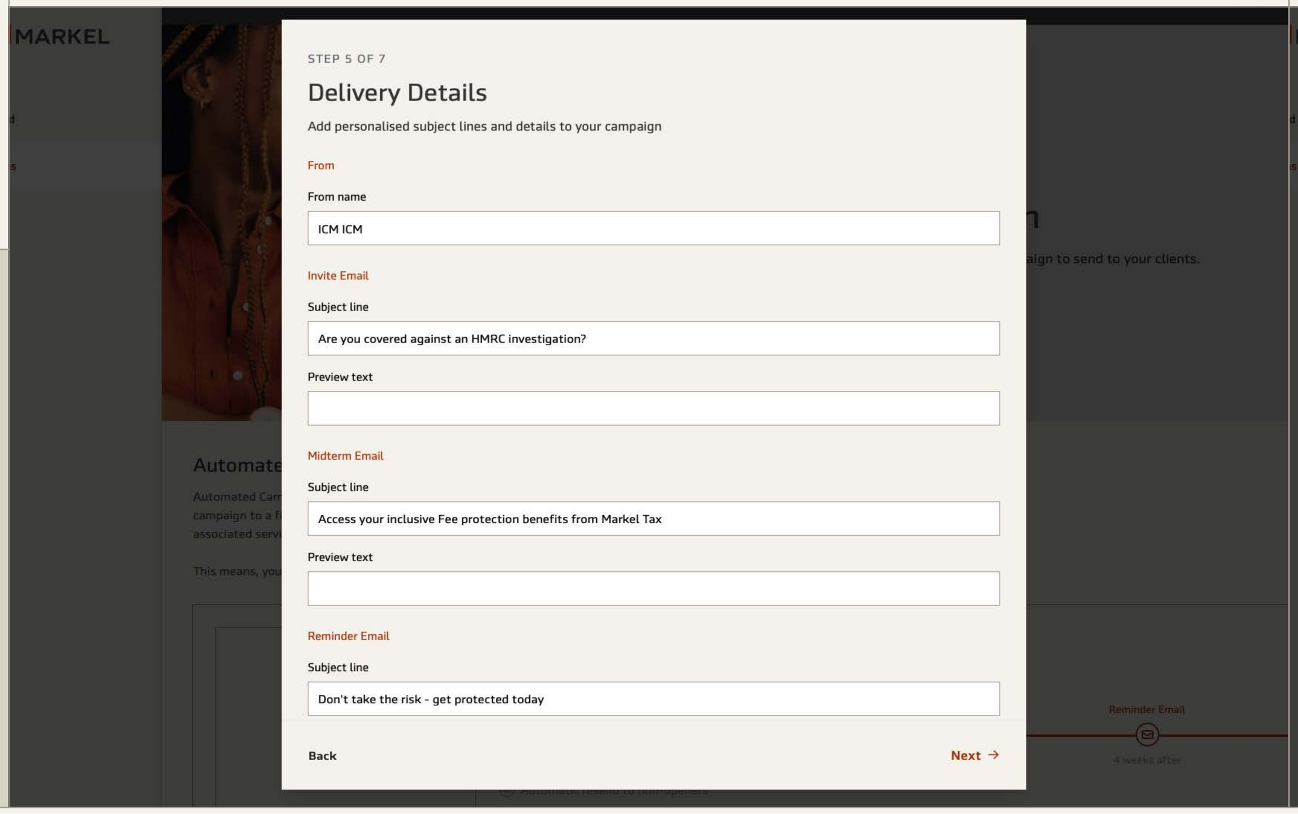
Tip

If one of the rows has been highlighted red, you can select the pen icon to make any amendments to this row of data.

Step 5

You are now ready to finalise the subject line for each of your three emails.

You will find ghost copy populated here with our recommendations; however, you are able to amend this if you would like.

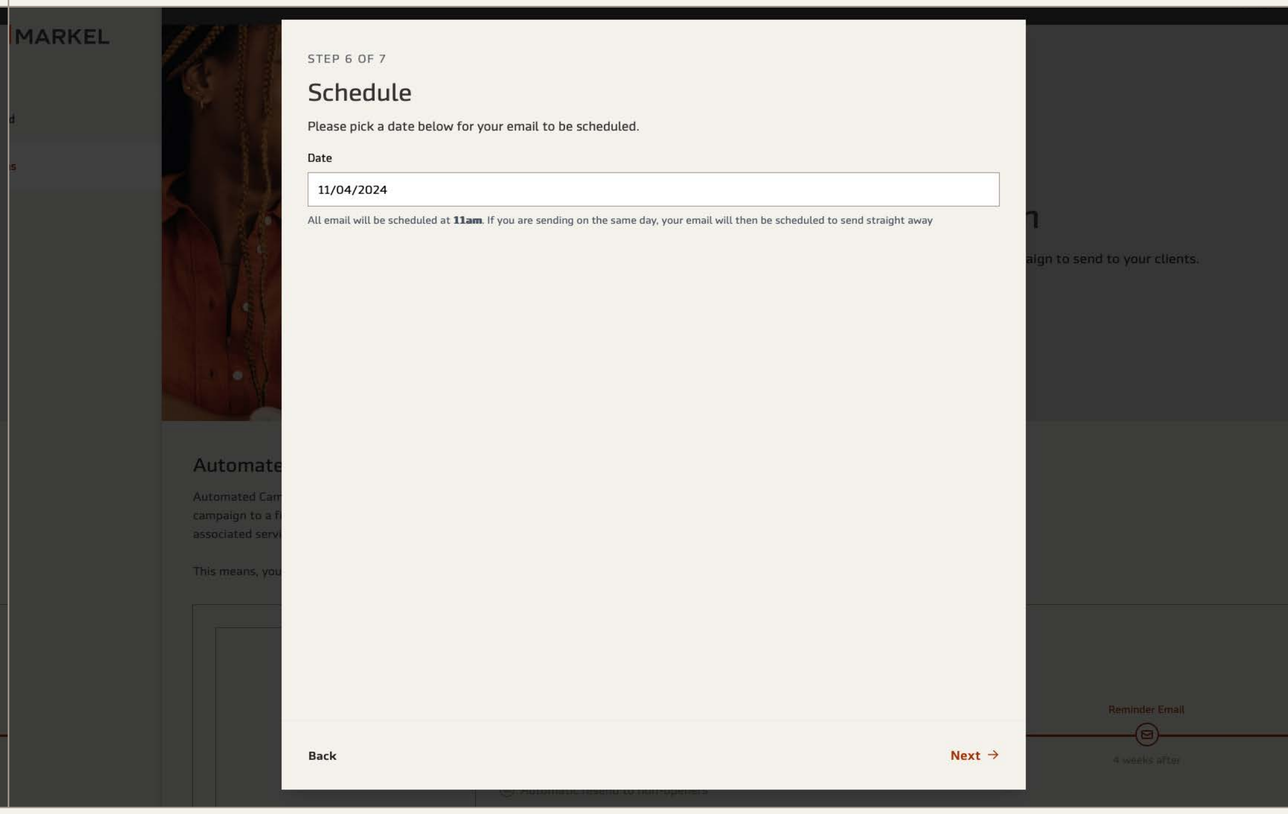


Step 6

The penultimate step to getting your campaign out is scheduling the date you'd like your recipients to receive the first email.

If you schedule your campaign in advance, it will go out at 11am on the selected date. If you choose to send this out on the same day, the campaign will go out ten minutes after it's been approved, unless this is before 11am on the selected date.

We recommend this being done one month prior to the scheme start date.



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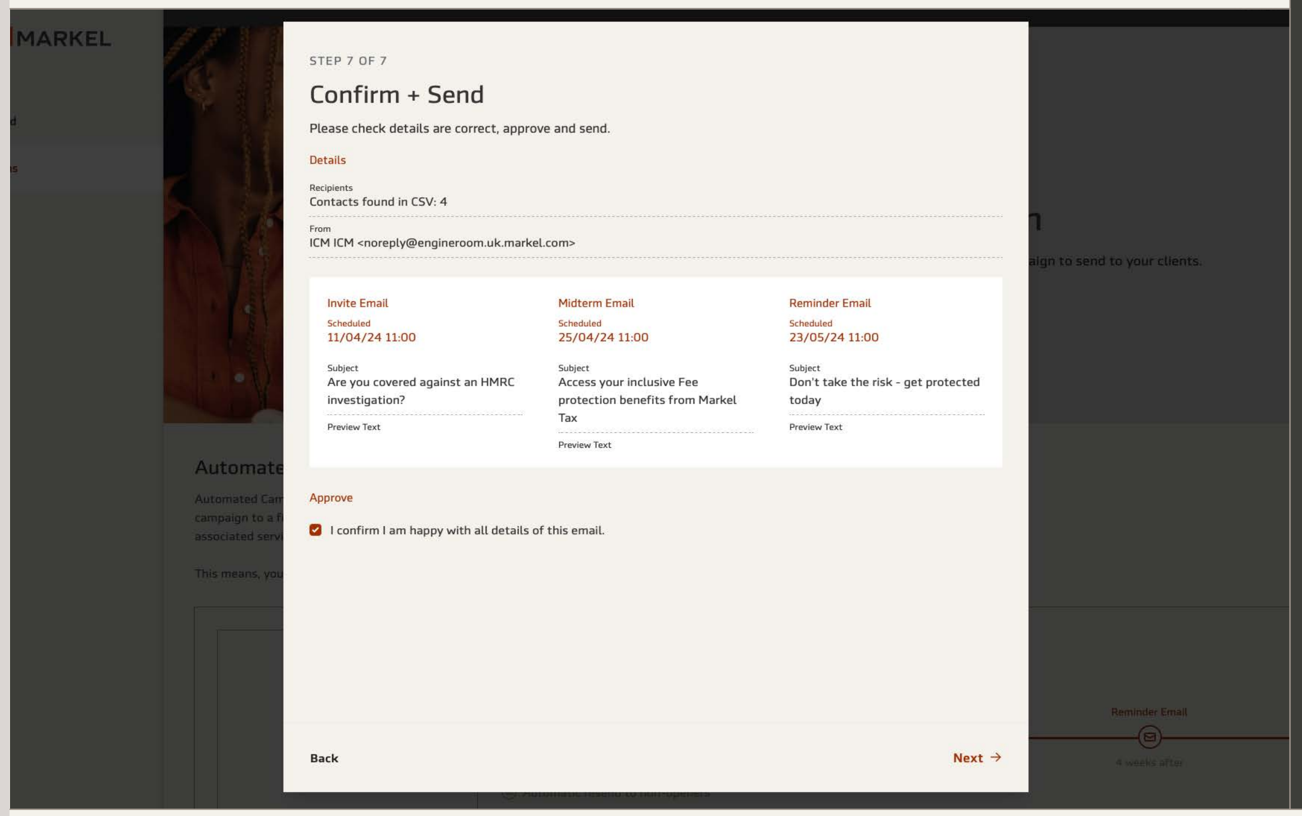
Creating your campaign

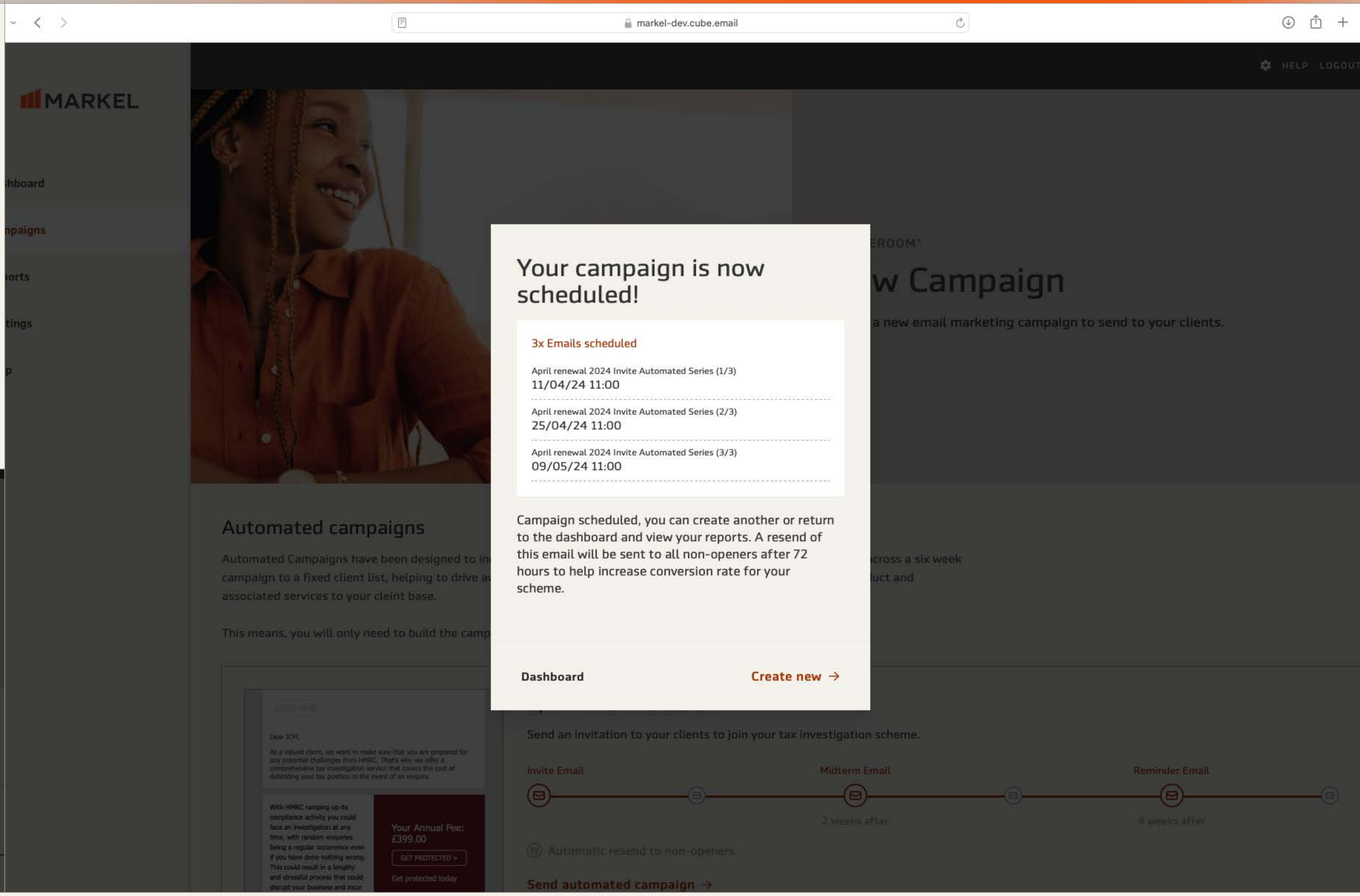
Step 7

Your campaign is ready to send. Please double check all the information you have entered before approving.

Once you've approved the campaign, your campaign will be scheduled to go.

If you do have any issues whilst setting up your campaign, please don't hesitate to contact the support team at markelsupport@incontrolmarketing.co.uk

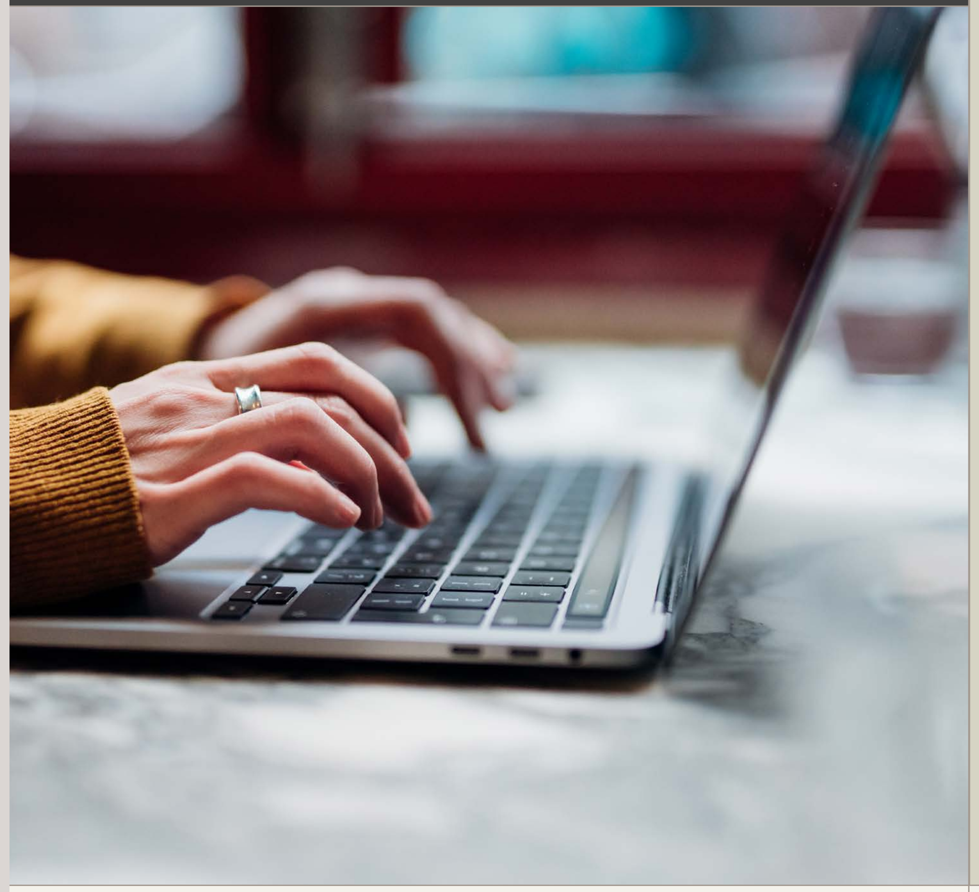




Reporting and dashboard

Analyse your campaigns with:

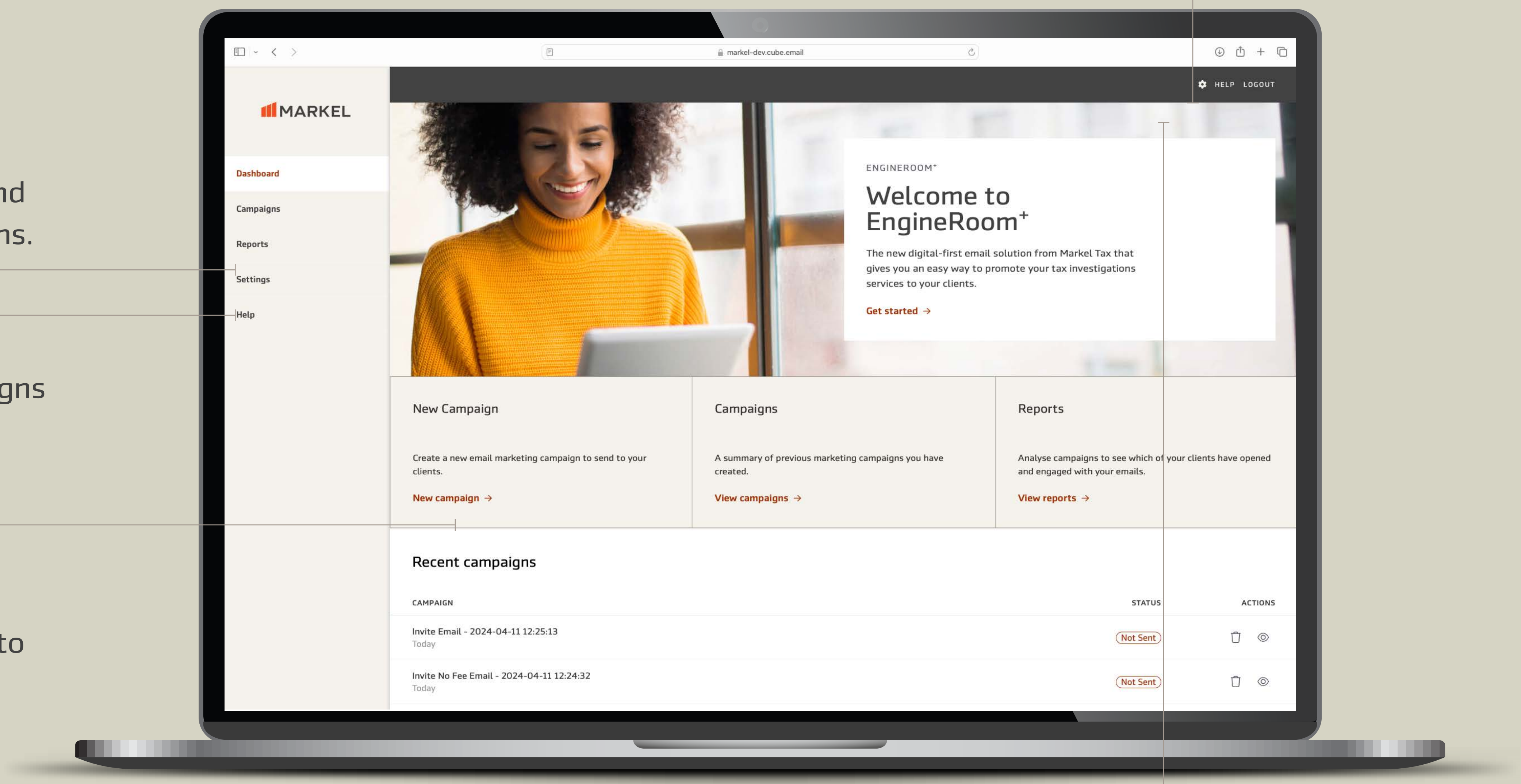
- Number of recipients
- Open rate
- Total clicks
- Bounce rate
- Contacts who clicked



Campaigns
View your previous and existing live campaigns.

Reports
See how your campaigns have performed.

New campaign
Create a new email marketing campaign to send to your clients.



Help
Access tutorial guides and demo videos.

Settings
Change your existing settings including company details, names etc.

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Our friendly team is always on hand to support you with additional queries, call us on 0345 355 2230.