# EngineRoom+ tutorial guide

Enter →

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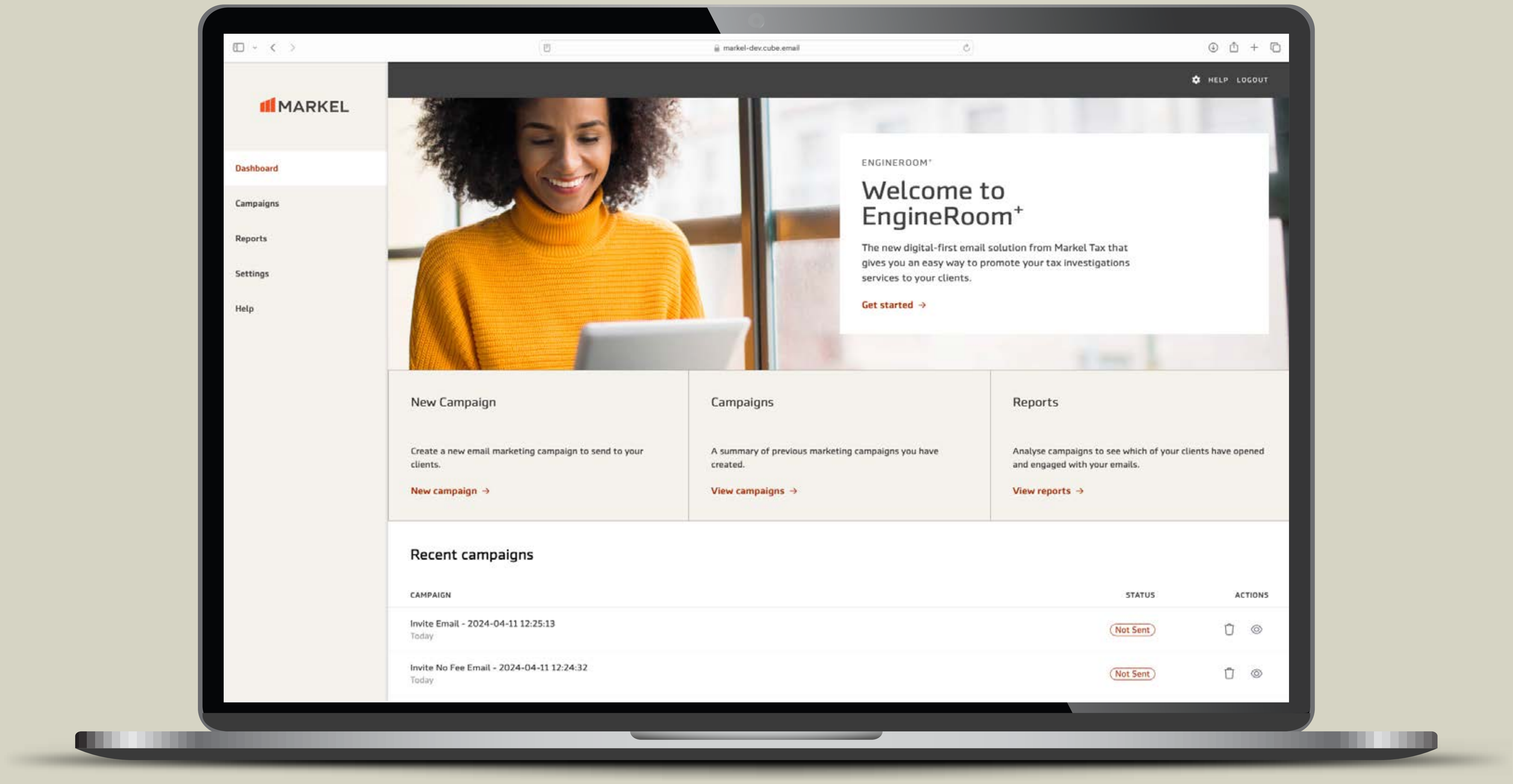
# What is EngineRoom+?

EngineRoom+

The innovative online marketing platform from Markel that helps change how you promote your tax investigations service to clients.

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# 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](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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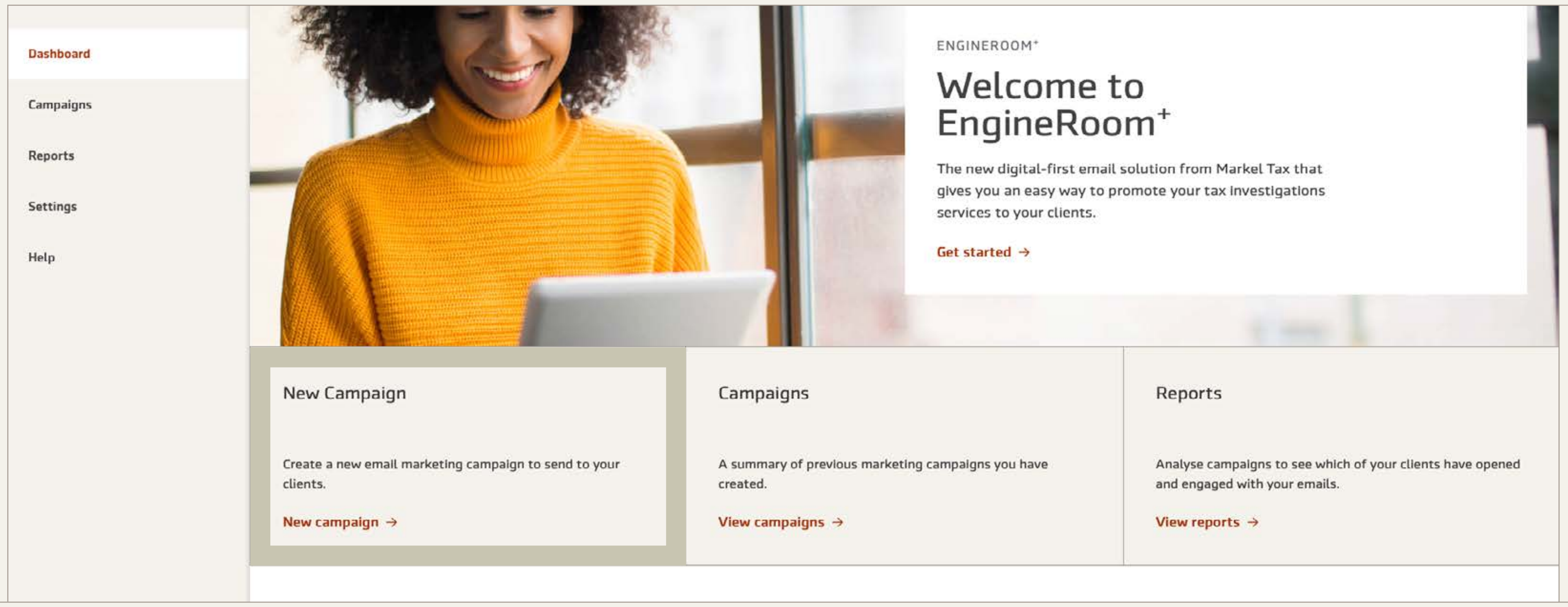
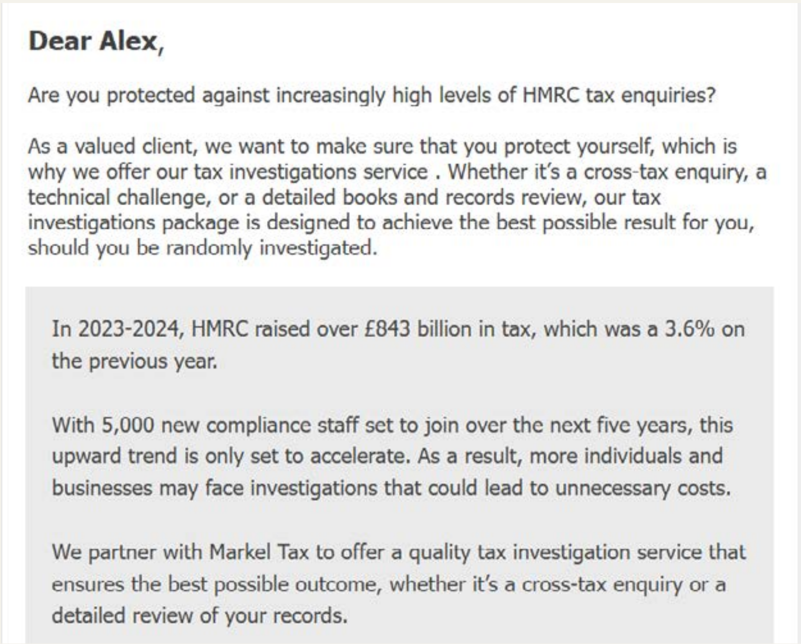
# Creating your campaign



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.



**Dear Alex,**

Are you protected against increasingly high levels of HMRC tax enquiries?

As a valued client, we want to make sure that you protect yourself, which is why we offer our tax investigations service . Whether it’s a cross-tax enquiry, a technical challenge, or a detailed books and records review, our tax investigations package is designed to achieve the best possible result for you, should you be randomly investigated.

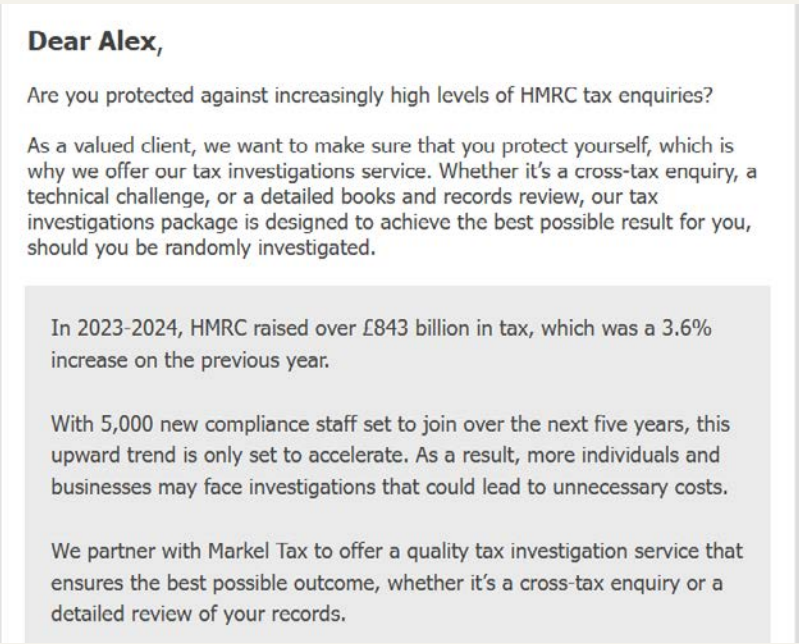
In 2023-2024, HMRC raised over £843 billion in tax, which was a 3.6% on the previous year.

With 5,000 new compliance staff set to join over the next five years, this upward trend is only set to accelerate. As a result, more individuals and businesses may face investigations that could lead to unnecessary costs.

We partner with Markel Tax to offer a quality tax investigation service that ensures the best possible outcome, whether it’s a cross-tax enquiry or a detailed review of your records.

### Grow your scheme and renew clients with ease

Use this template to include all clients in your service or target those who have signed up previously – ensuring they renew. This template notifies clients that they’ll be invoiced for the service, UNLESS they opt out.



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### Invite clients to subscribe

This set of emails allows you to invite clients to join your service and provides payment options. It can be used for both new and existing clients, but if you already have subscribers, it is recommended to send them the opt-out template.

→ **Invite Email**

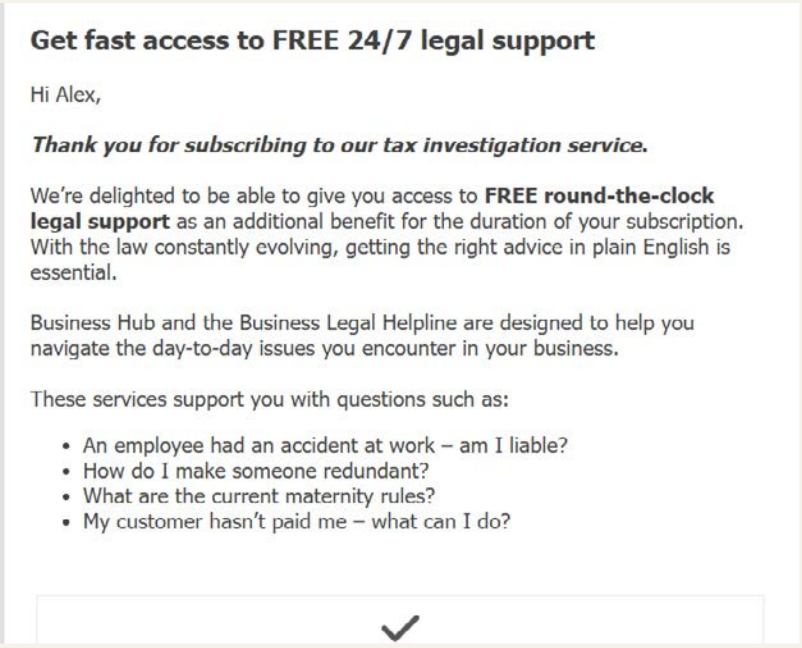
Send an invitation to your clients to join your tax investigation service.

→ **Reminder Email**

Don’t let signing up slip your clients’ minds – remind them to subscribe with this email.

→ **Ongoing Promotion Email**

Ensure none of your clients miss out on the benefits of your service with this mid-year invite to subscribe.



**Get fast access to FREE 24/7 legal support**

Hi Alex,

***Thank you for subscribing to our tax investigation service.***

We’re delighted to be able to give you access to **FREE round-the-clock legal support** as an additional benefit for the duration of your subscription. With the law constantly evolving, getting the right advice in plain English is essential.

Business Hub and the Business Legal Helpline are designed to help you navigate the day-to-day issues you encounter in your business.

These services support you with questions such as:

- An employee had an accident at work – am I liable?
- How do I make someone redundant?
- What are the current maternity rules?
- My customer hasn’t paid me – what can I do?

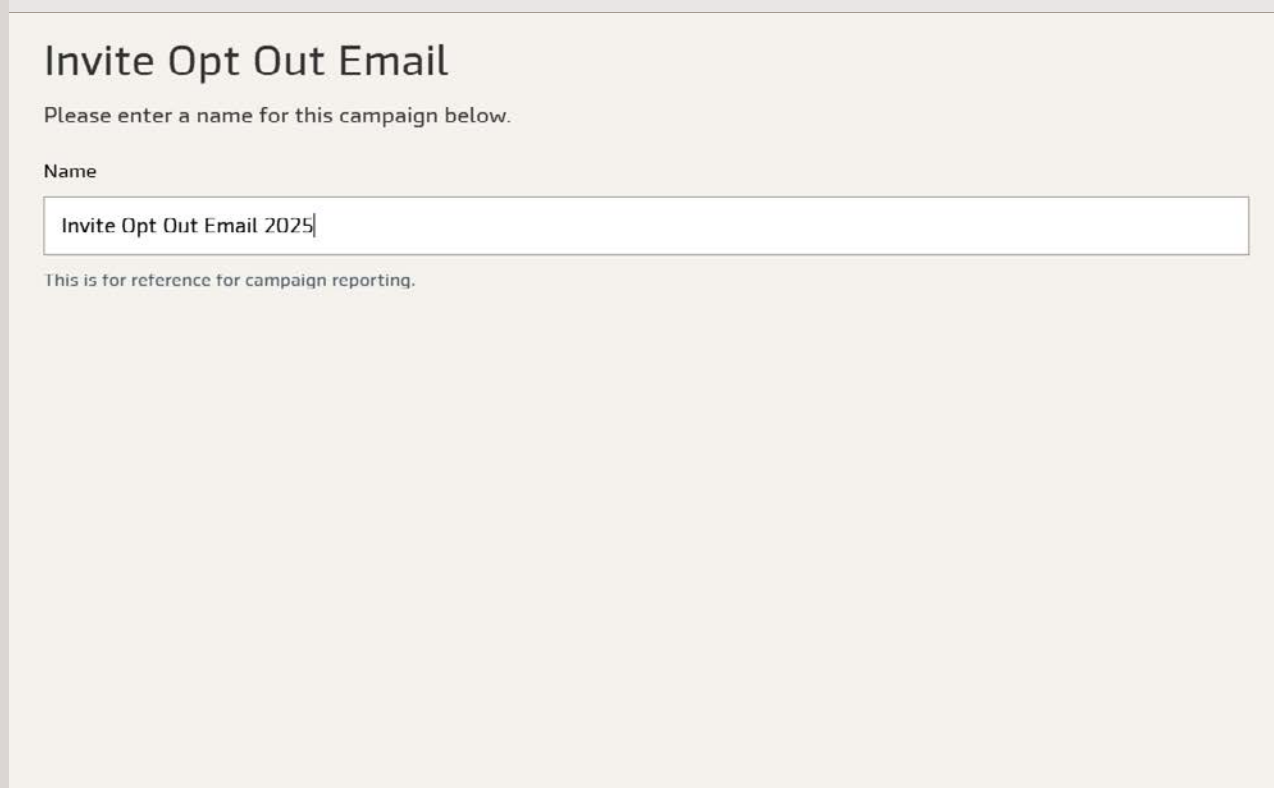
### Ensure your client’s access business legal support

Once clients have subscribed, make sure they get the full benefit of your service. This email provided them with the access codes and information they need to start using the Business Hub and Legal helplines.

# Creating your campaign

## Step 1

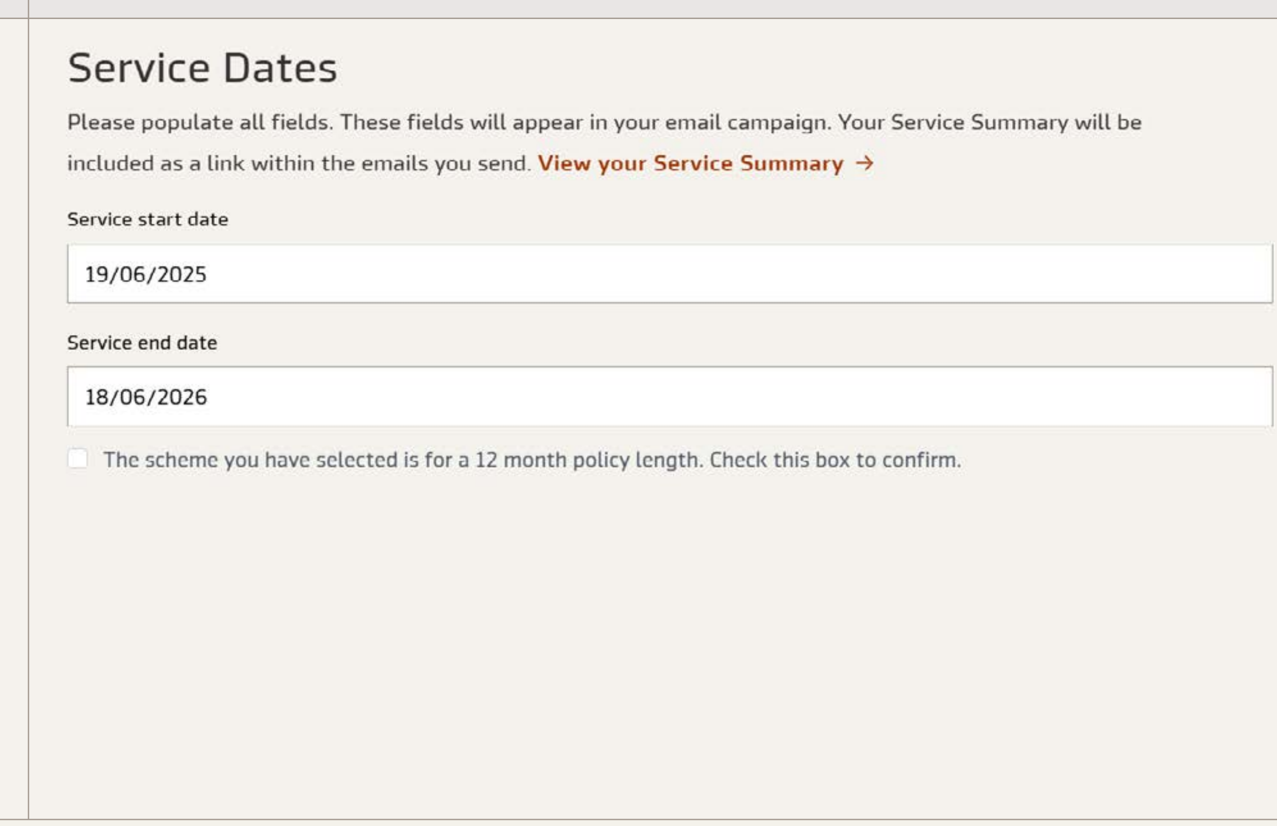
The first step is to give your campaign a name – this is for your own reporting. For example: '**Invite Opt Out 2025**'.




## 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.

*This step won't appear for Business Hub email and the Midterm email.



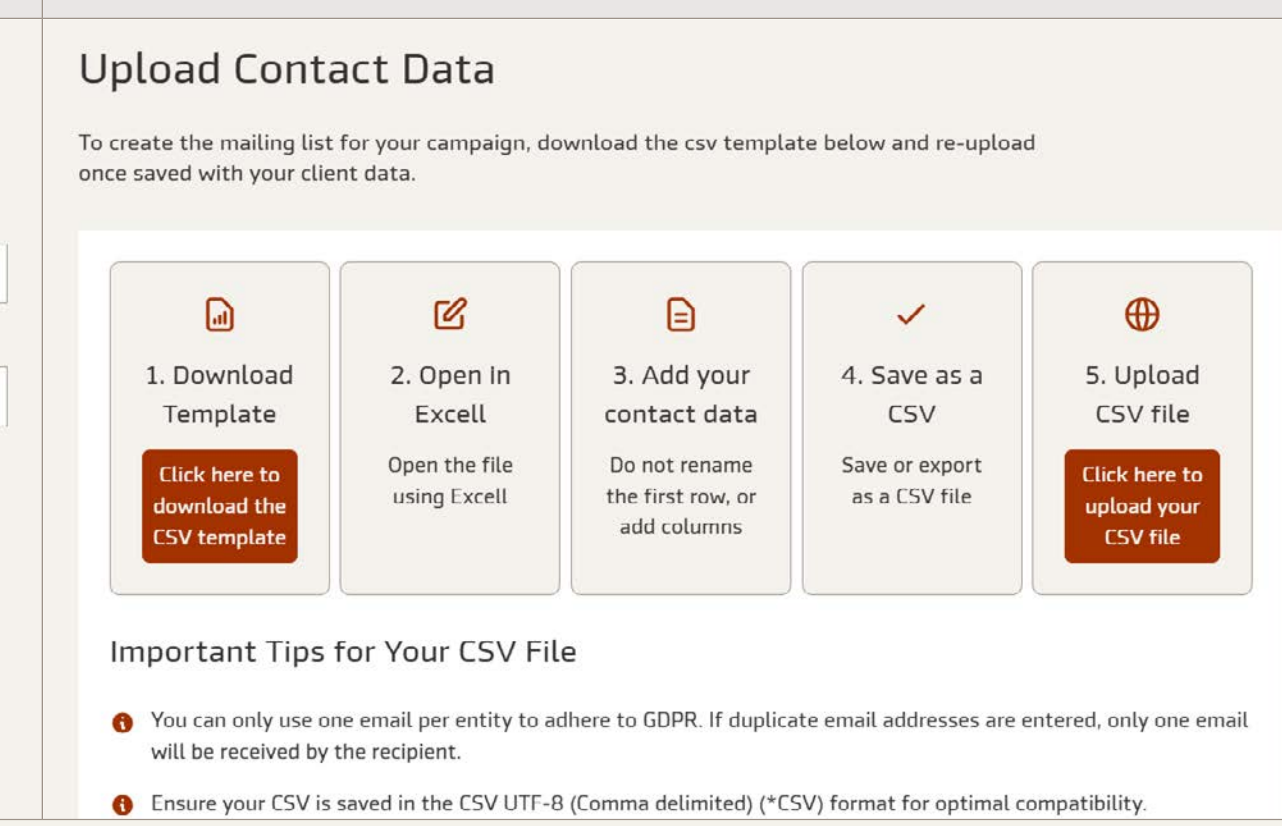

## Step 3

Upload contact data here. Select '**Download the CSV template**' – you will need to format your data into the following*

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

Format your data then select '**Click here to upload your CSV file**'

*Business Hub email will only require first name and email address.



# Creating your campaign



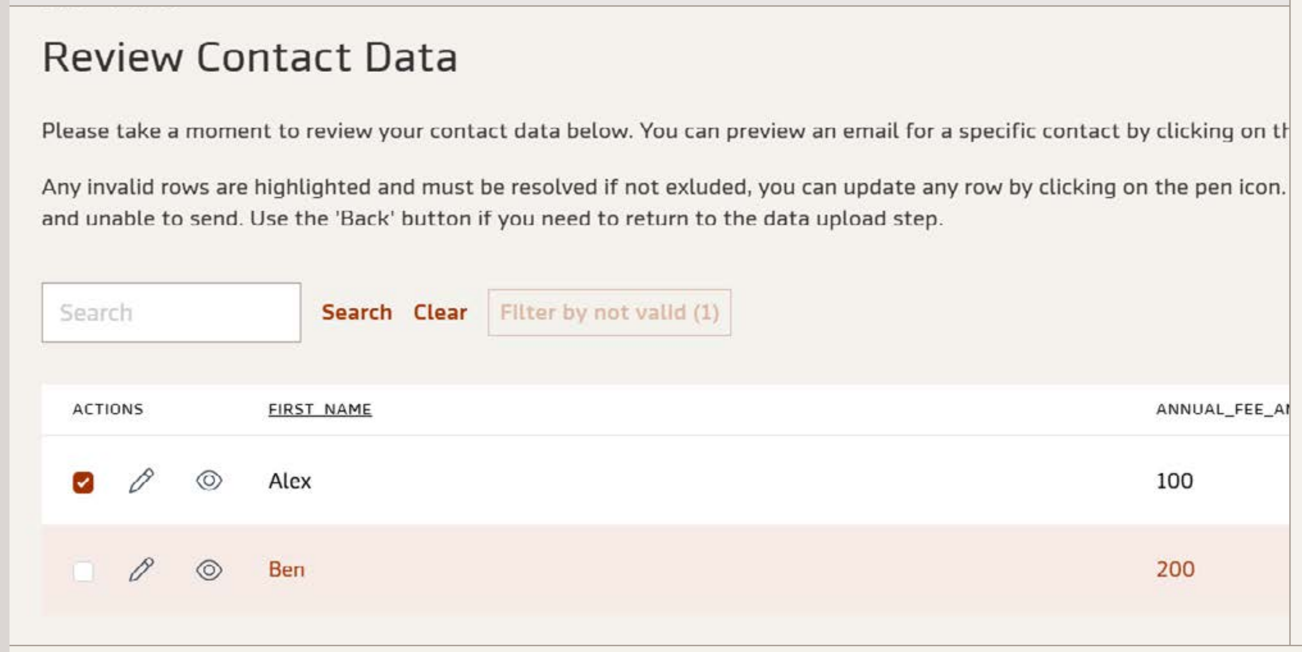
## Step 4

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:

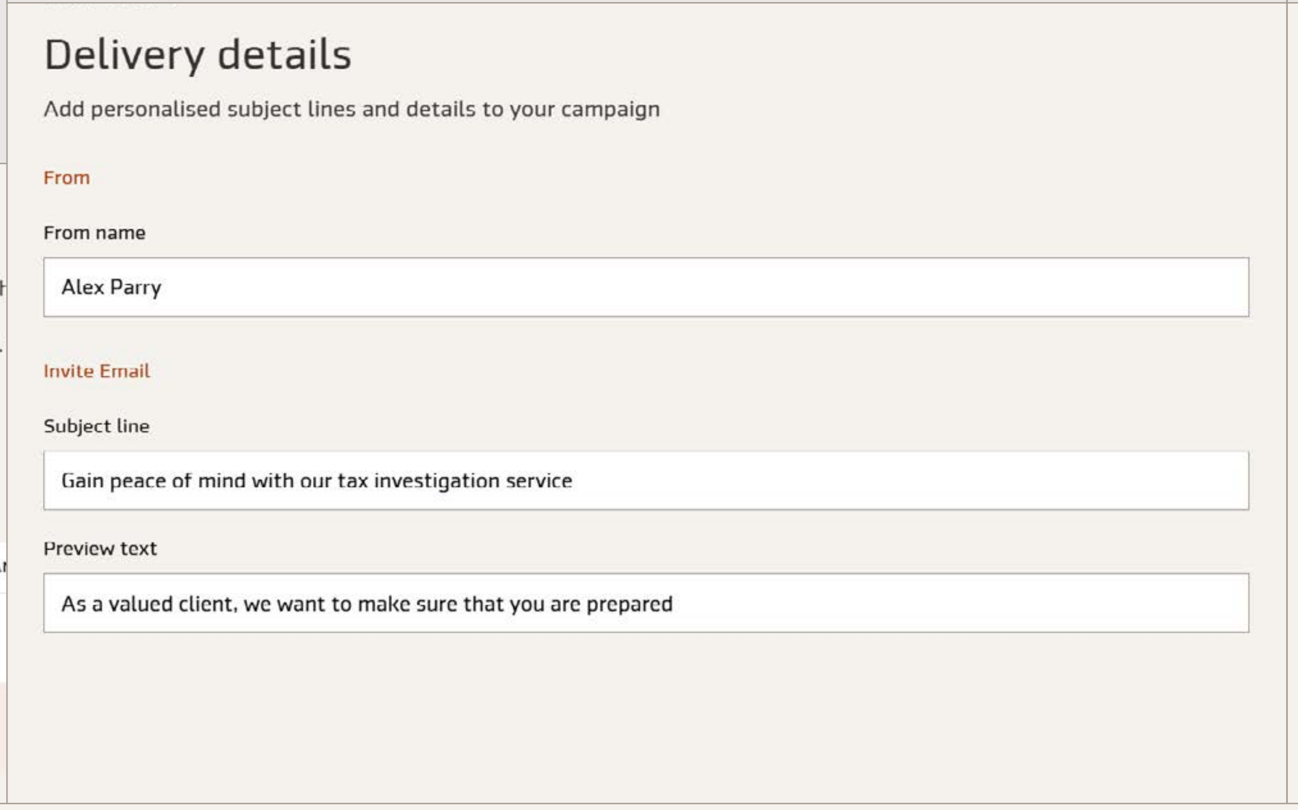
– The contact is not a duplicate that has already been recorded in the CSV
– Validity of the email address used




## Step 5

You are now ready to finalise the subject line for your email.

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

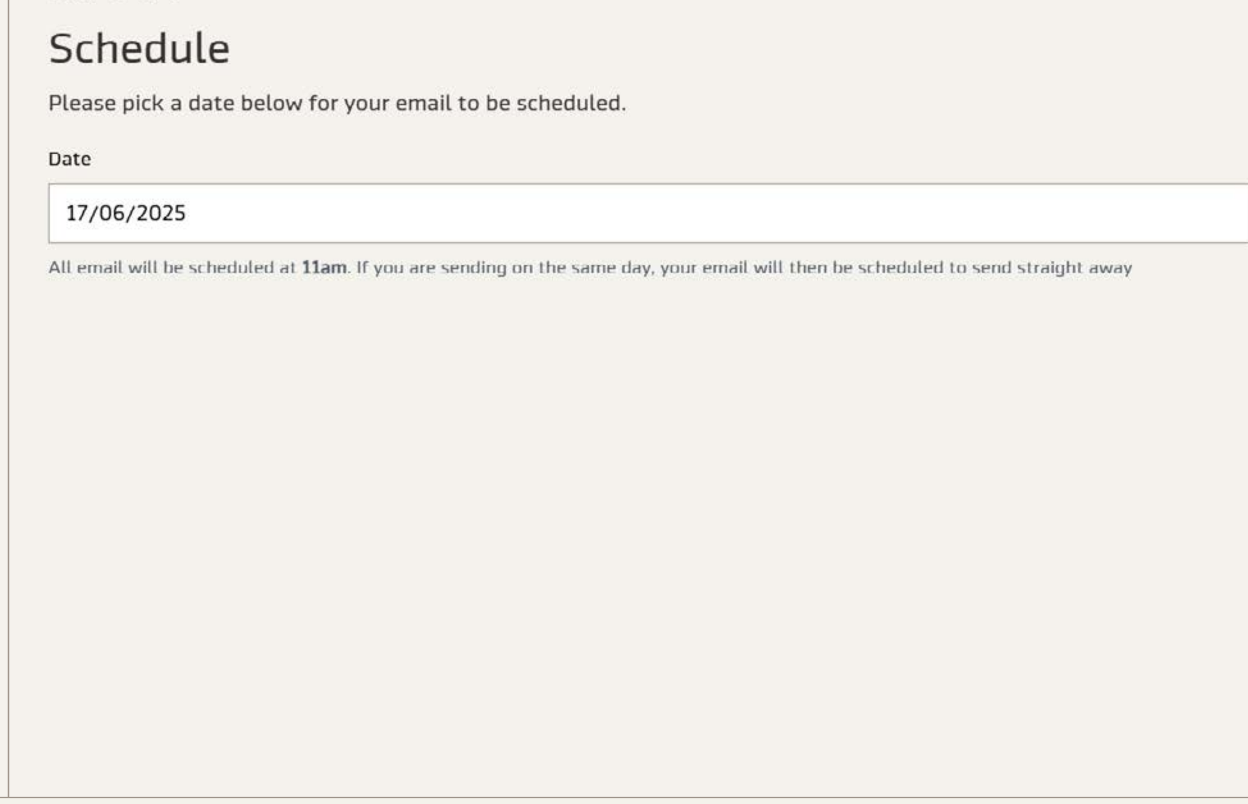



## Step 6

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

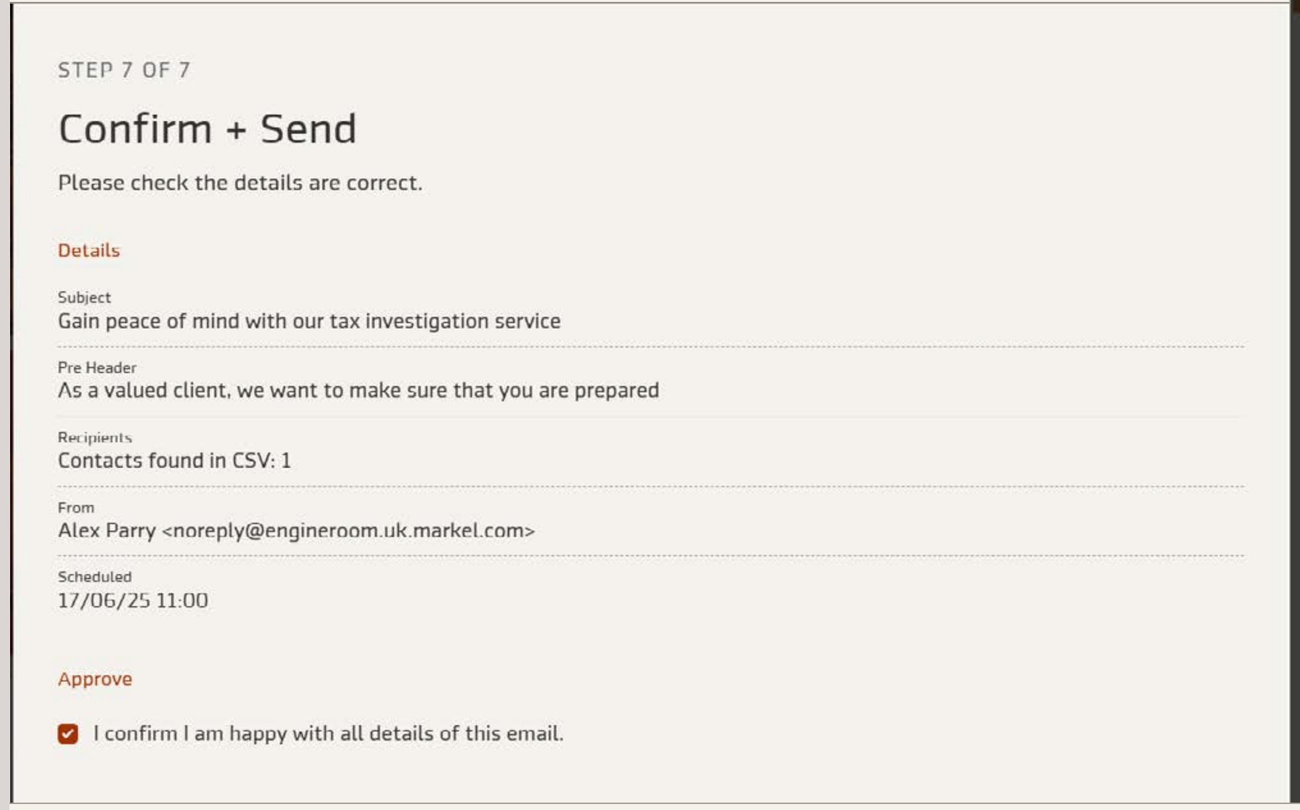


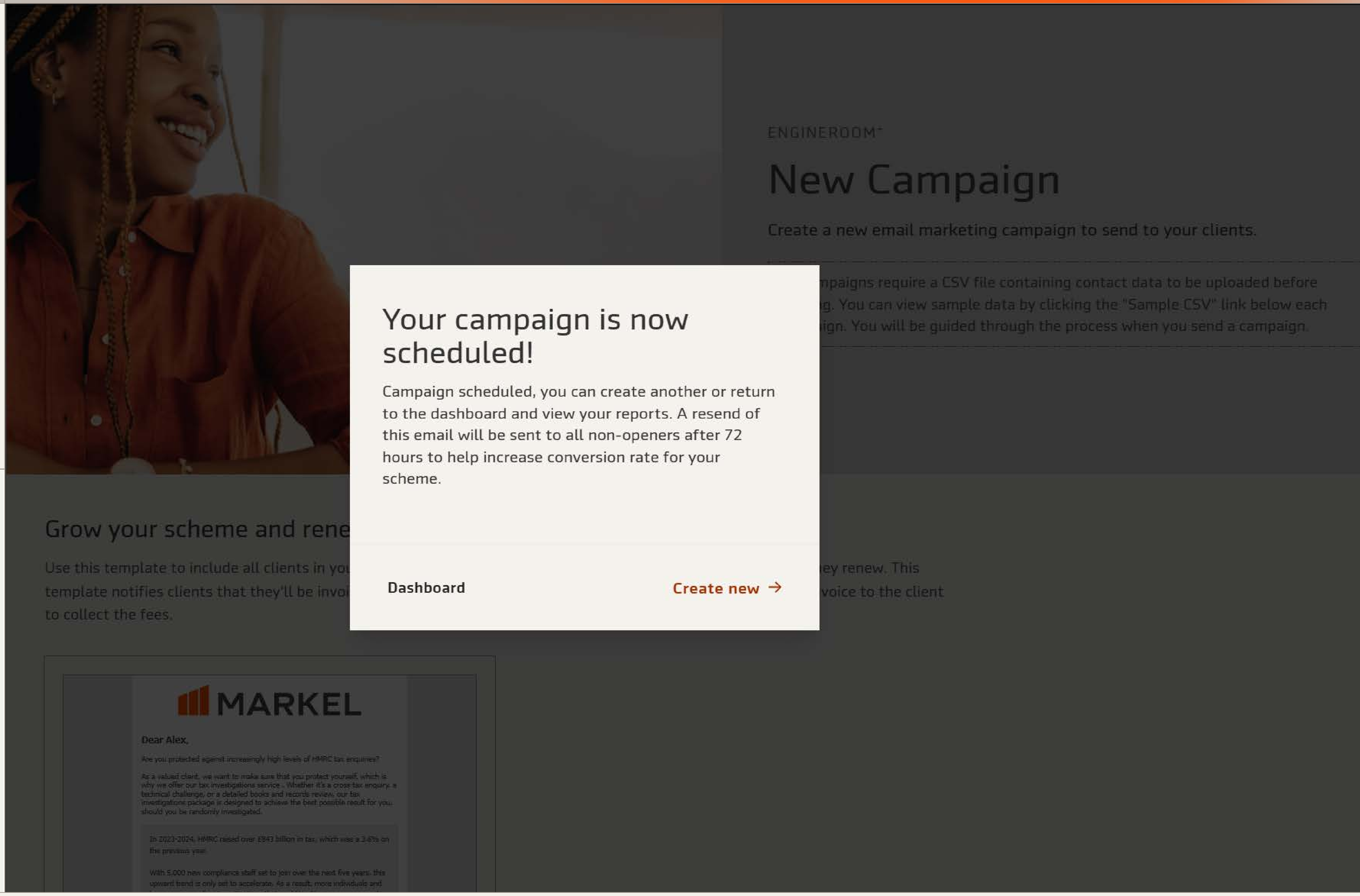
## Step 7

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



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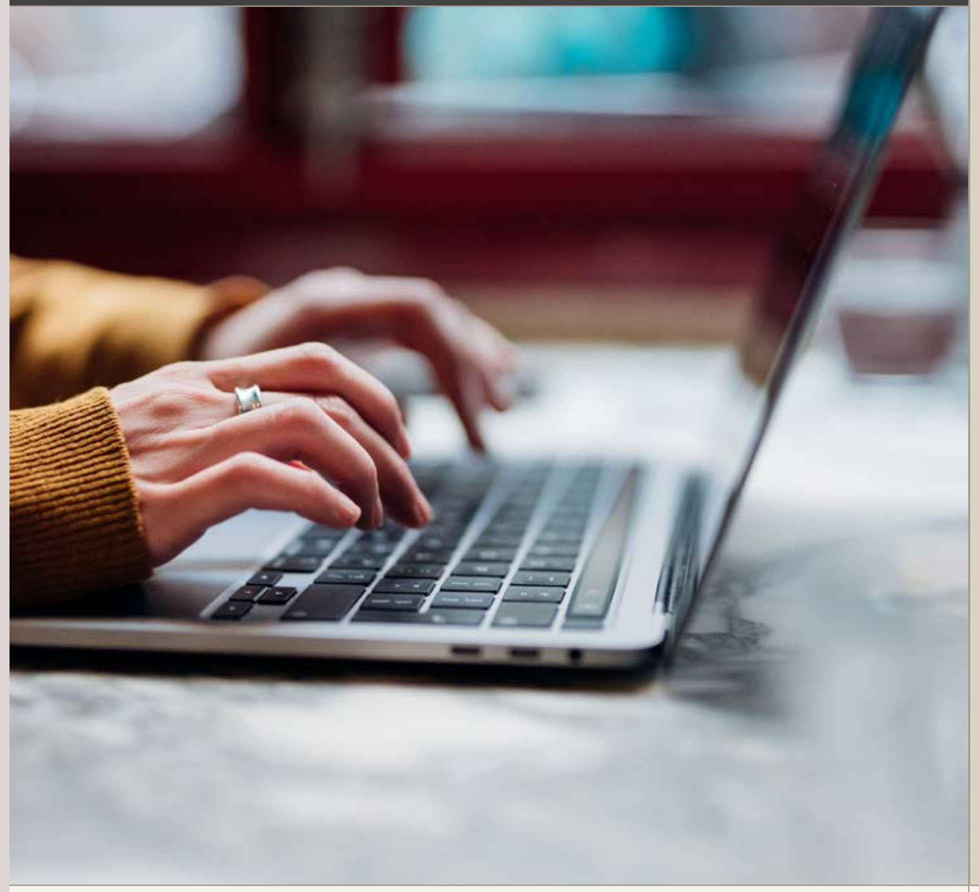
# Reporting and dashboard



## Analyse your campaigns with:

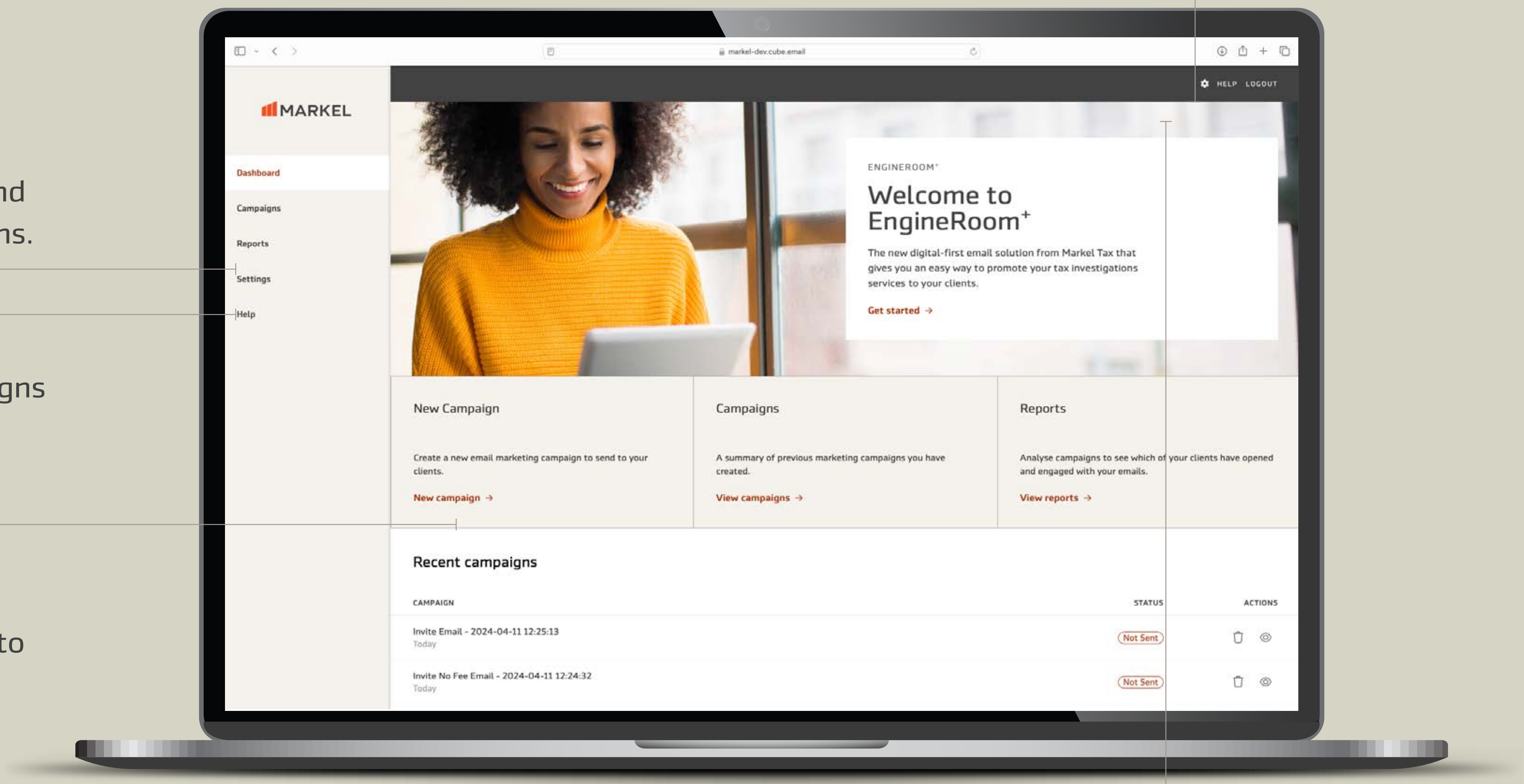
- Number of recipients
- Open rate
- Total clicks
- Bounce rate
- Contacts who clicked



**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.