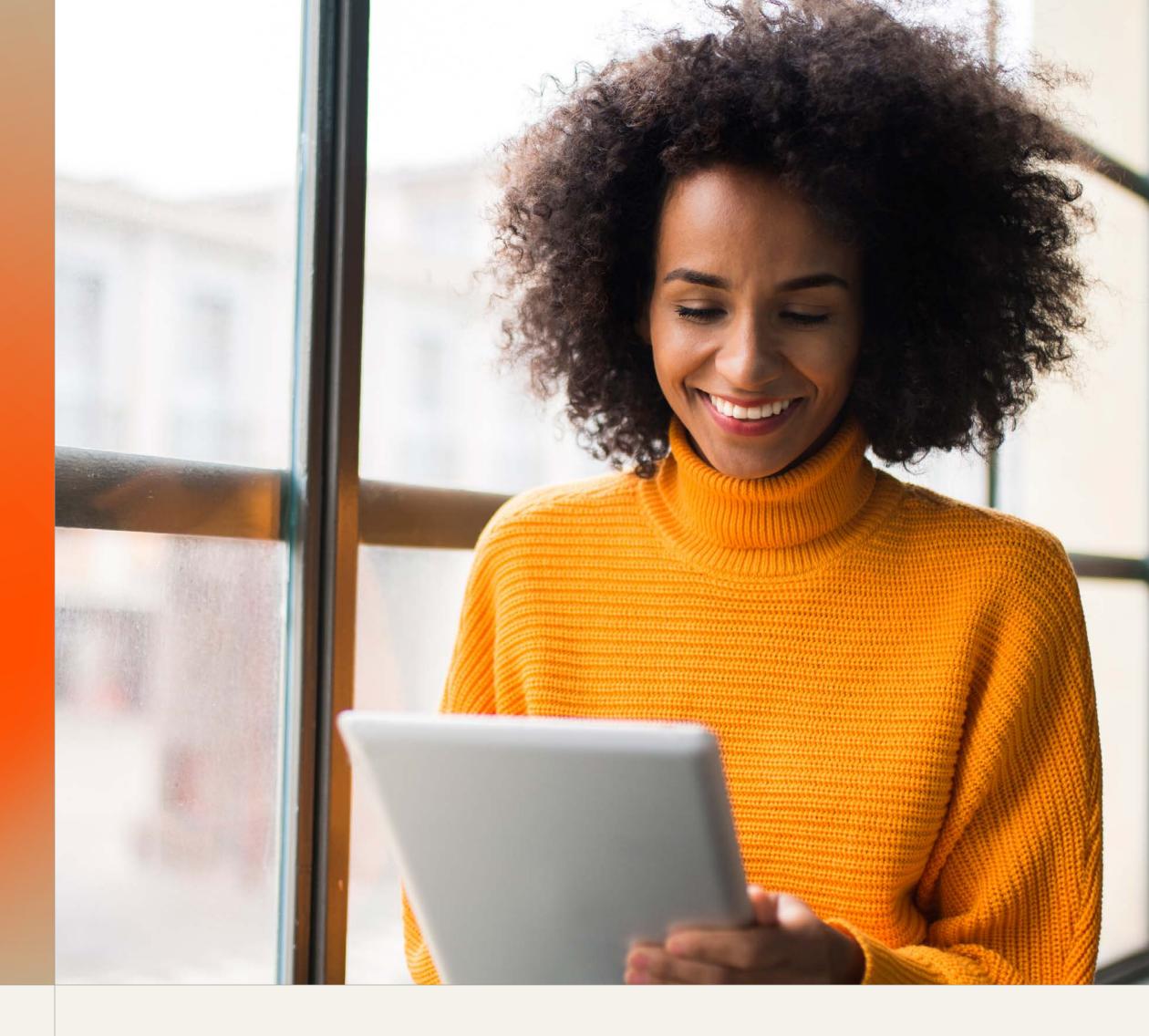
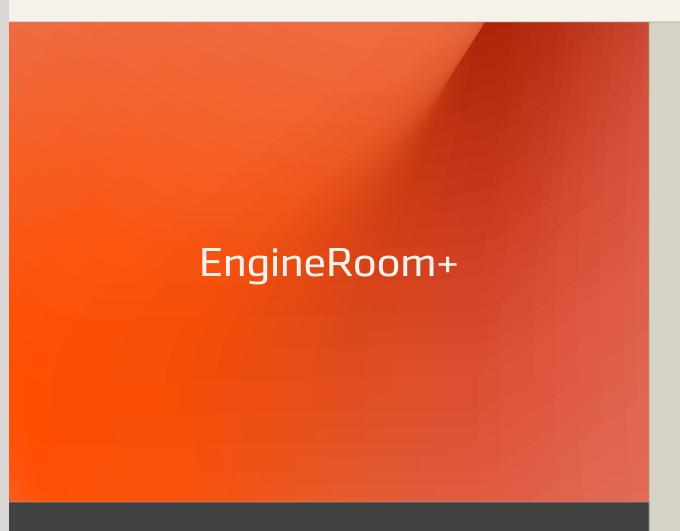
EngineRoom+ tutorial guide

MARKEL





What is EngineRoom+?



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



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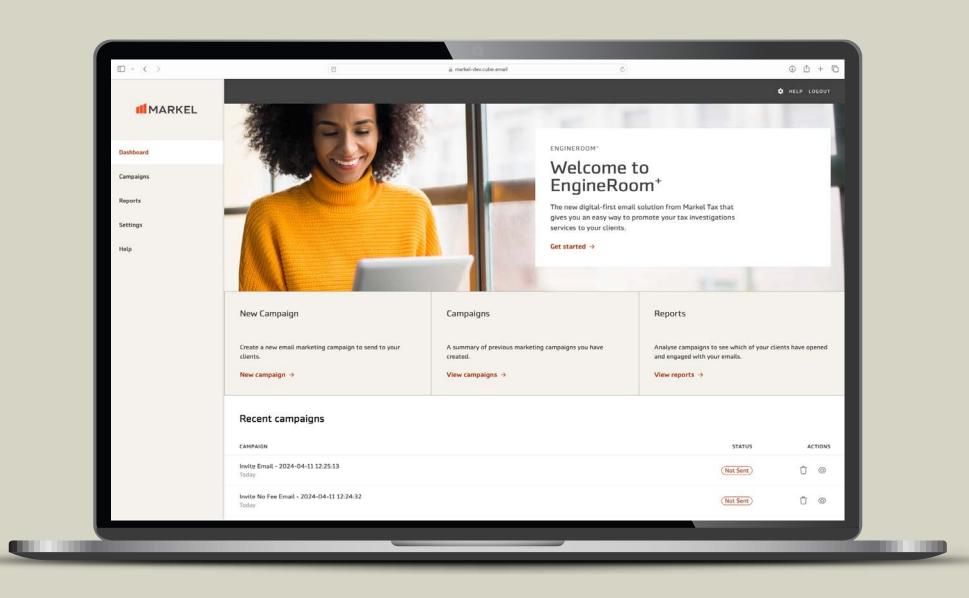
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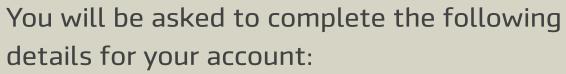
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How to register for an account

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



- \bigcirc Name
- Account email address your log-in details will be sent here
- Company name
- Scheme ID $\left(\checkmark \right)$

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



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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**.

Please wait .ink in the	If you have any issues with receiving this email or with registering your account, please contact:	
	markelsupport@incontrolmarketing.co.uk	

Your first time logging in

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'.



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



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.

Complete set-up

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.

Branding

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



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

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.



Profile

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



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,

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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.

Dear Alex,

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

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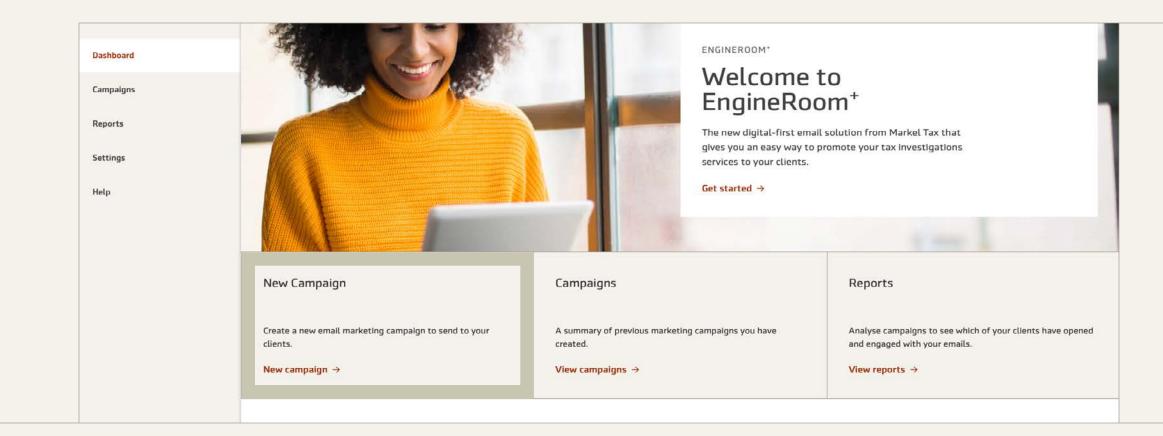
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We partner with Markel Tax to offer a quality tax investigation service that ensures the best possible outcome, whether it's a cross-tax enquiry or a detailed review of your records.

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.





In 2023-2024, HMRC raised over £843 billion in tax, which was a 3.6%

\rightarrow 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 bonefits of y

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

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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.

Step 1

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

Invite Opt Out Email

Please enter a name for this campaign below.

Name

Invite Opt Out Email 2025

This is for reference for campaign reporting.

Servio

Please pop included as

Service start

Service end c

18/06/20

The sche



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 '	
Upload Contact Data To create the mailing list for your campaign, download the csv template below and re-upload once saved with your client data.	
1. Download2. Open in3. Add your4. Save as a5. UploadTemplateExcellcontact dataCSVCSV file	
Click here to download the CSV template Open the file using Excell Do not rename the first row, or add columns Save or export as a CSV file Click here to upload your CSV file Important Tips for Your CSV File Important Iper entity to adhere to GDPR. If duplicate email addresses are entered, only one email will be received by the recipient. Important CSV File	

Brsure your CSV is saved in the CSV UTF-8 (Comma delimited) (*CSV) format for optimal compatibility.

Step 4

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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

Review Contact Data

Alex Parry Please take a moment to review your contact data below. You can preview an email for a specific contact by clicking on the

Any invalid rows are highlighted and must be resolved if not exluded, you can update any row by clicking on the pen icon. Invite Email and unable to send. Use the 'Back' button if you need to return to the data upload step.

Search	Search Clear Filter by not valid (1)		Gain pea	
ACTIONS	FIRST NAME	ANNUAL_FEE_AI	Preview tex	
200	Alex	100	As a valu	
	Веп	200		

Step 5	Step 6
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.	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.
Delivery details Add personalised subject lines and details to your campaign From From name Alex Parry Invite Email Subject line Gain peace of mind with our tax investigation service Preview text	Schedule Please pick a date below for your email to be scheduled. Date 17/06/2025 All email will be scheduled at 11am. If you are sending on the same day, your email will then be scheduled to send straight away
As a valued client, we want to make sure that you are prepared	

Step 7

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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 <u>markelsupport@</u> <u>incontrolmarketing.co.uk</u>

STEP 7 OF 7

Confirm + Send Please check the details are correct.

Details

Subject Gain peace of mind with our tax investigation service

Pre Header As a valued client, we want to make sure that you are prepared

Recipients Contacts found in CSV: 1

Alex Parry <noreply@engineroom.uk.markel.com>

Scheduled 17/06/25 11:00

Approve

🛛 🗹 I confirm I am happy with all details of this email.



Gro Use ti tempi



Grow your scheme and ren

is template to include all clients in you ate notifies clients that they'll be invoi ect the fees.

Your campaign is now scheduled!

Dashboard

Campaign scheduled, you can create another or return to the dashboard and view your reports. A resend of this email will be sent to all non-openers after 72 hours to help increase conversion rate for your scheme.

Create new →

paigns require a CSV file containing contact data to be uploaded before 1. You can view sample data by clicking the "Sample CSV" link below each 20. You will be quided through the process when you send a campaign

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

ey renew. This voice to the client

New Campaign



Are you protected agend increasingly high levels of PMRC tax enquineer? As a valued chert, we want to make sure that you protect yourself, which is why we offer our tax investigations service. Whether it's a cross tax enquiny, teamical chellenge, or a detailed books and records review our tax, investigations package is designed to achieve the best possible result for you.

in 2023-2024. HMNC reased over £343 billion in fax, which use a 3.6% fre presents year. With 5.000 new compliance staff set to join over the next five years. th 09

Reporting and dashboard

Analyse your campaigns with:

- Number of recipients
- 🕑 Open rate

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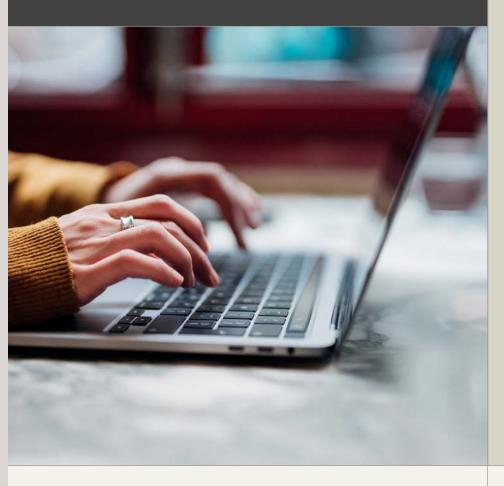
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- 🕑 Total clicks
- Bounce rate
- Contacts who clicked

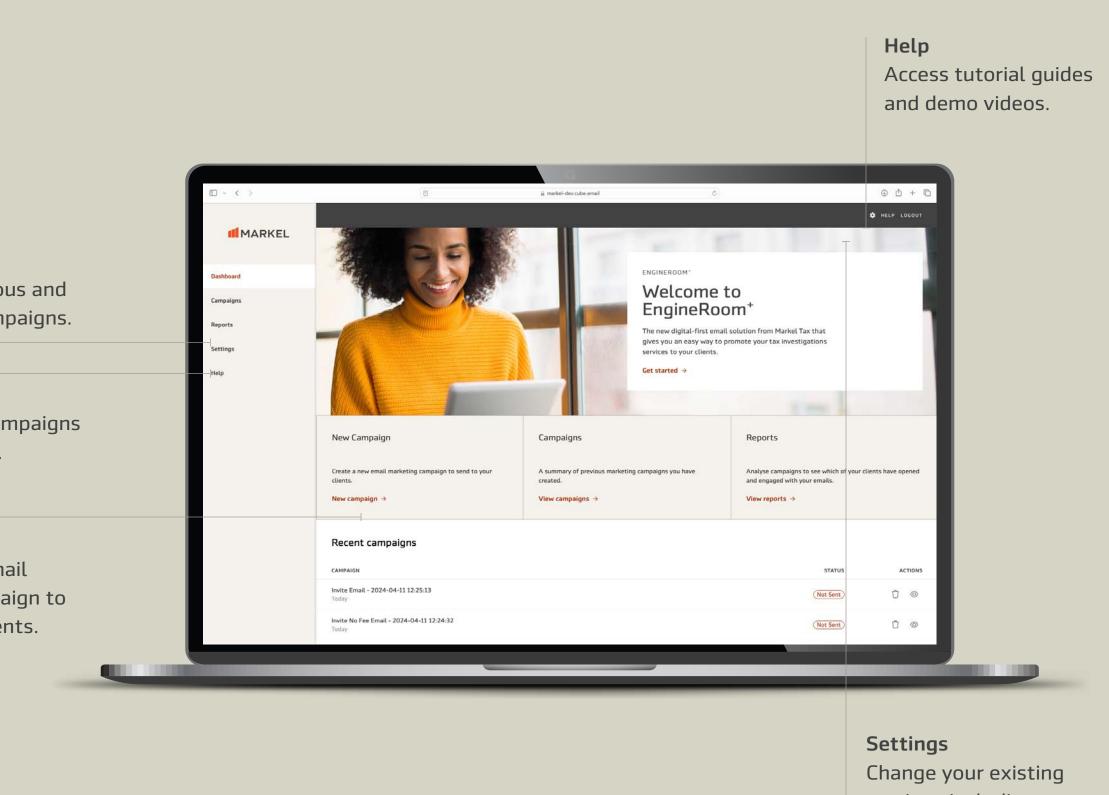


Campaigns View your previous and existing live campaigns.

Reports See how your campaigns have performed.

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





Change your existing settings including company details, names etc.



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

engineroom.uk.markel.com

