BrandMaker

Basic Guide

For Users

Version 7.1

EN

19 November 2021

100100000002

Table of Contents

Copyright

Rüppurrer Straße 1, 76137 Karlsruhe (Germany), www.brandmaker.com

Your feedback is important to us!

We would be grateful to be notified of any errors you may discover. Just send us an e-mail to documentation@brandmaker.com.

1 Introduction

This documentation provides users with information about the following topics:

- Basic navigation in the system
- The user area, in which each user can configure personal settings such as entering address data, creating substitutes for absences or changing the password.
- Managing notifications that you receive as the system user

This documentation is intended for all system users, regardless of their role in the system.

2 Basic Navigation

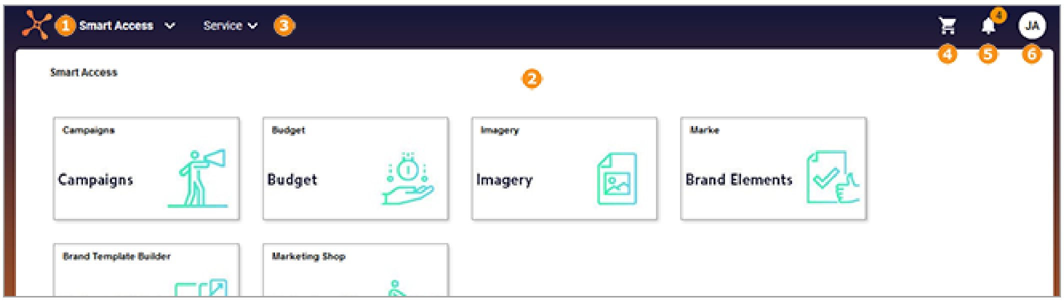
The BrandMaker system generally consists of multiple modules that provide an extensive range of functions. In addition, as the system user, you can always access your personal settings and notifications. This chapter explains the basic navigation for these functions.

Note

Note that the system does not support the back button in your browser. It is therefore only in exceptional cases possible to open a previous view again by clicking the back button. Note that such exceptional cases may also no longer work in later versions.

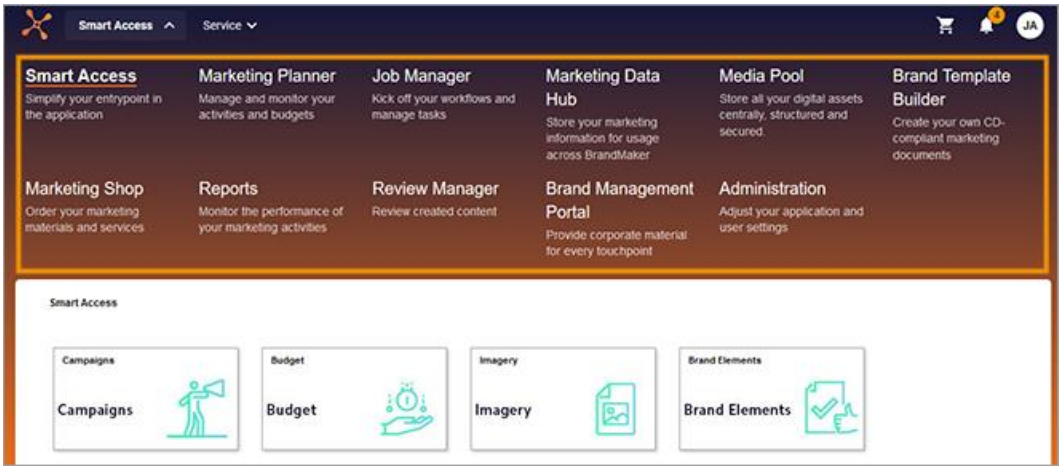
Header

You can navigate between the modules, your notifications and your system settings using the system header:



You can use the dropdown list on the left in the header (1) to access the modules. When the list is closed, the top field displays the current selected module, which is where you currently are. The selected module is displayed below (2). To the right of the dropdown list you can reach the navigation at the top-level within the module (3), in the picture in the *Smart Access* module of the *Service* entry.

When you open the dropdown list, the desktop is moved down and a list of the modules accessible to you is displayed:



Please note that the dropdown list will probably look different in your system. There are several possible reasons for this:

- The dropdown list in the image above shows all the modules with their default names. These names can be changed in your system based on the selected language. Your system administrator will inform you about which name is used to access which function.
- Not all the modules are activated in your system. Possibly your company may not require all the modules.
- You do not have access to all the modules. Depending on your tasks in the system, it may make sense to allow you to access only selected modules. Discuss any changes that you consider necessary with your system administrator.

If you are able to place orders in the *Marketing Shop* module, you can also see the shopping cart icon (4) in the header. You can click the icon to open the shopping cart.

Clicking the bell icon (5) opens a dialog opens in which you see two items:

- The dialog shows the latest notifications that have been sent to you. By clicking *Show all*, you get an overview of all notifications. The number on the bell indicates how many unprocessed notifications you have. For more information, see chapter 4.
- Administrators who have started an export or import can view the status here. The administrator, who has started an export, can download or delete the result via a link here. The link is valid for 3 hours. For more information, please refer to the administration manual.

When you click your name (6, here: John Admin), a list with two options opens:

- User settings (see chapter 3)
- Logout (i.e. you are logged out of the system)

3 User Settings

In the user settings, you can edit and change some of the information that has been stored for your user account. Click *your user name* and then *User Settings* in the upper area of the Marketing Efficiency Cloud.

The following functions are available:

- *Settings*: Specify when you want to receive messages from the system. You can edit your user data and configure personalized settings such as the interface language or your preferred start module.
- *Change password*: Change your password.
- *Manage affiliate*: Change your assignment to an affiliate.
- *Substitutes*: Edit substitution rules for the *Media Pool*, *Brand Template Builder*, *Marketing Shop*, or *Job Manager* modules.
- *Distribution lists*: Create or edit distribution lists.

Note

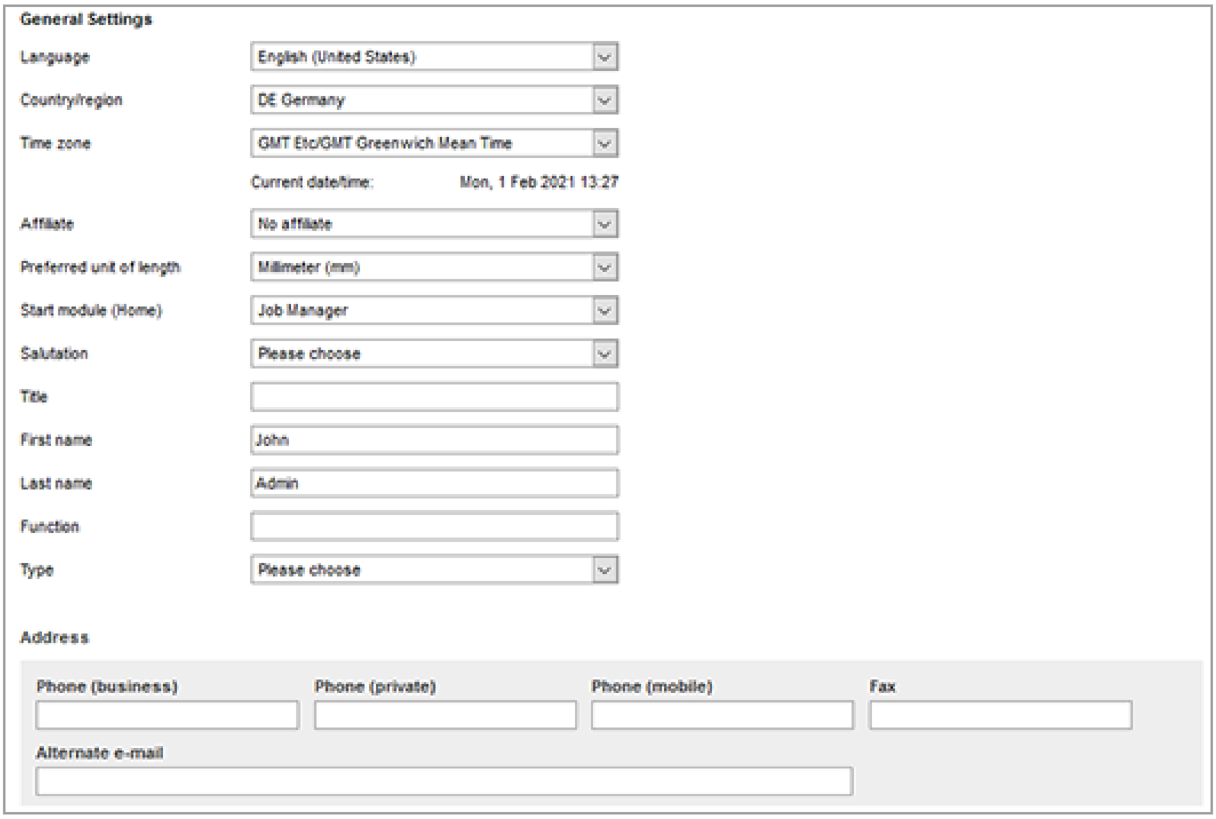
You can also access the *Working hours* and *Absences* areas. The areas are created in preparation for functionality that will be introduced with version 7.2. In version 7.1 the areas are without function.

3.1 Settings

Click > *Your name* > *User Settings* > *Settings* to configure various settings for your user account.

Area	Description
Notifications	Specify whether you want to receive system messages by e-mail. Define a *Signature*. The signature is used when you send an e-mail (for example, when you *send an asset by e-mail* from the Media Pool).

Area	Description
General Settings	• *Language*: Choose your interface language. • *Country/region*: Select your country or region. • *Time zone*: Select your time zone. • *Affiliate*: If you are assigned to multiple affiliates, specify your default affiliate. • *Preferred unit of length*: Select the unit of measure in which lengths are specified in the *Brand Template Builder* module. • *Start module*: Specify which module is displayed after you log in. • *Personal data*: Edit your own personal data (title, name, function, (user) type).
Address	Edit your address or enter a different invoice address, delivery address, or postal address.



3.2 Change Password

Click > *Your name* > *User Settings* > *Change password* to choose a new password. You have to enter your current password before you can change your password.

Note: The requirements for the password can be set on a customer-specific basis and can therefore be different. The rules for creating a valid password are displayed as an info text to the right of the input fields. A tool tip specifies which rules have been violated. The selected password must not be the identical to the user name.

3.3 Editing Affiliates

Click > *Your name* > *User Settings* > *Manage affiliate* to define the affiliate to which you are assigned.

Note: A user can select an affiliate.

Prerequisites:

- You have selected an affiliate.
- Multiple affiliates are stored for you.

An affiliate can be linked to information such as an address or opening times, which can then be used automatically (for example, when customizing a document in *Brand Template Builder* module).

Note: The list of existing affiliates and their linked information is displayed using custom structures. If you have any additional questions, contact your BrandMaker contact person.

3.4 Defining Substitutes

You can set another user as your substitute either on a permanent basis or for a specific time period. You can activate these substitution rules for the following modules:

- Media Pool
- Brand Template Builder
- Marketing Shop
- Job Manager

Define a substitute for the *Media Pool*, *Brand Template Builder,* and *Marketing Shop* modules. You can also define a principle substitute for the *Job Manager* module. The principle substitute is selected from all the users with access to the *Job Manager* module. In this case, the principle substitute takes on all the tasks of the delegating user.
If you want to retain the functional separation of the user groups for a substitution in the *Job Manager* module, select substitutes for each user group to which you are assigned. These substitutes take on only the specific tasks that are assigned to you as part of the collective user group.

Tasks

The user defined as your substitute adopts the following tasks:

- Media Pool: The approval of assets that were imported to a VDB that requires approval.
- Brand Template Builder: The approval of documents and templates that have been imported to a VDB that requires approval.
- Marketing Shop: The substitute takes on all of the tasks.
- Job Manager: The substitute for the delegating user takes on the tasks resulting from his or her role as the processor of a job. If a substitute is defined for each user group, the substitutes take on only the tasks related to their membership of the user group.

Prerequisites

Note that users who are selected as substitutes must have the appropriate authorizations in the *Media Pool* and *Brand Template Builder* modules. If you select a user who does not have these rights, a warning message is displayed. You can still select the user. However, the user is not able to substitute for you. If you have any questions, please contact your system administrator.

In the *Marketing Shop* module, the substitute inherits all the rights of the user for whom he or she is substituting. In the Job Manager, the substitute receives the same rights as the delegating user for delegated tasks. There are no restrictions here as a result.

Starting and ending a delegation

You can start and end a delegation in several ways:

> **Note**
>
> A prerequisite for starting a delegation is that you have entered substitutes for the modules.

- You require the delegation for a specific time period (for example, because you are on vacation or cannot process your regular tasks in the system due to a trip abroad):
  a. Click the *Date period* field.
  b. In the displayed *Date period* dialog box, enter the time period with the start and end date.
  c. If necessary, edit the time for the start and end date.
  d. Choose *Apply*.
  e. Choose *Schedule delegation*.

     A confirmation dialog box is displayed.
  f. Choose *Confirm*.

     The delegation is scheduled and starts and ends at the specified times.

- You need to start a delegation for an undefined time period from a specific date:
  a. Click the *Date period* field.
  b. In the dialog box that opens, choose *Single selection* and enter the start date.
  c. If necessary, edit the time for the start date.
  d. Choose *Apply*.
  e. Choose *Schedule delegation*.

     A confirmation dialog box is displayed.
  f. Choose *Confirm*.

     The delegation is scheduled and starts and ends at the specified times. If you want to end the delegation, choose *Stop delegation*.

- You want to delegate the tasks immediately for an undefined time period:
  a. Choose *Start delegation now*.

     A confirmation dialog box is displayed.

  b. Choose *Confirm*.

     The delegation is scheduled and starts and ends at the specified times. If you want to end the delegation, choose *Stop delegation*.

Notifications during the delegation

An administrator can choose whether the function for sending notifications to the delegating user is generally deactivated. If the administrator allows notifications to be sent, you as the delegating user can choose whether you want to receive the notifications. If you do, activate the checkbox *Send changes during the delegation by e-mail to me*.

3.4.1 Specifying a Substitute

You want to define the user *Max Mustermann* as your substitute for the *Media Pool* and *Brand Template Builder* modules during your vacation (14.10.2019 to 25.10.2019).

1. Click > *Your name* > *User Settings* > *Substitutes*.
2. Click the pencil icon next to *Media Pool*.

The dialog box *Substitute for group Media Pool* opens.

3. Select a user.
   You can search through the list of users manually or enter a part of the name. The list then automatically displays only the hits found.
4. Select your substitute (*Max Mustermann*) from the search hit list.
5. Choose *Confirm*.

The user *Max Mustermann* is loaded to the overview of substitutes.

6. Repeat steps 3 to 6 for Brand Template Builder.
7. Click the *Date period* field above the module list.

A dialog box for selecting a time period opens.

8. Enter the desired time period for the delegation:

a. Choose *Range selection* to define a start and end date.

b. Select the time period from October 14, 2019 to October 25, 2019.

c. Enter the time at which you want the delegation to start on the start date and end on the end date. The default time is midnight.

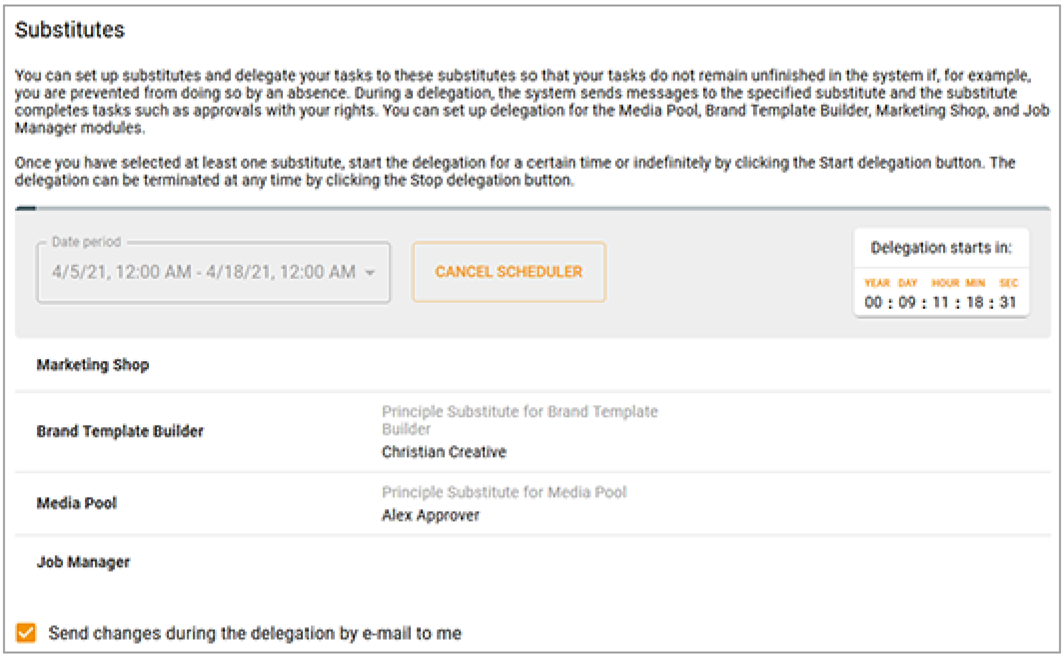
d. Choose *Apply*.

9. Choose *Schedule delegation*.

The *Schedule delegation* dialog box opens.

10. Choose *Confirm*.

You have defined the user Max Mustermann as your substitute for the *Media Pool* and *Brand Template Builder* modules in the time period from October 14, 2019 to October 25, 2019. The time control is activated and the delegation will start on October 14, 2019. The remaining time until the start of the delegation is displayed.



3.5 Distribution Lists

You can use the relevant search fields to select a distribution list as a recipient in the same way as you select an e-mail address. You can create and use distribution lists to group together arbitrary users regardless of their organizational unit, user groups, or roles. You can then, for example, use the lists to send assets (Media Pool) or a created marketing plan (exported from the Marketing Planner) to the e-mail addresses of all the users included in the distribution list at the same time.

In the Marketing Efficiency Cloud, there is a difference between private and published distribution lists. A private distribution list can only be used by the user who created the distribution list. A published distribution list can be selected and used by all users.

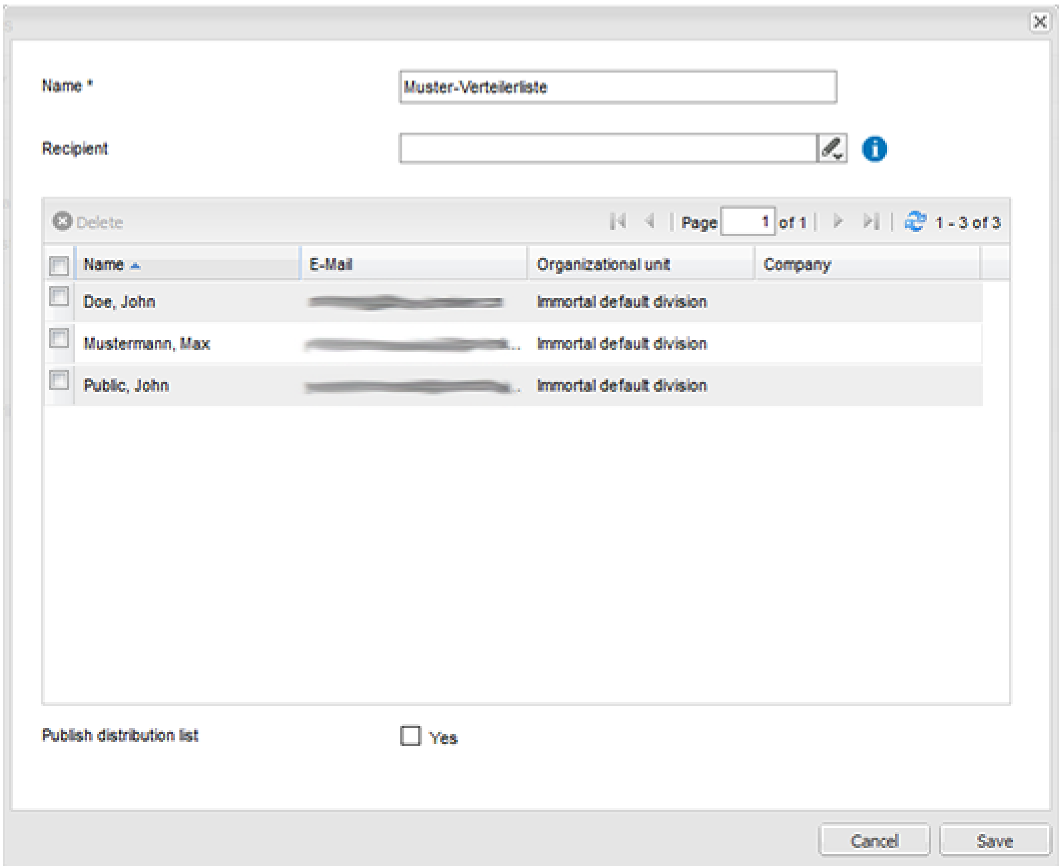
Prerequisites

- A distribution list must contain at least one user.
- You must have the right PUBLISH_DISTRIBUTION_LISTS to publish your distribution list.

Actions for which you can use distribution lists

You can select your own distribution list or a published one from the *Recipient* search field and use it for the following actions:

- Sending a collection (Media Pool)
- Forwarding a collection (Media Pool)
- Sharing a collection (Media Pool)
- Sending a timeline (Marketing Planner)
- Sending a created export (Marketing Planner)



Creating a distribution list

You want to group multiple users together in a distribution list so that assets (the latest images for an image campaign, for example) can be sent to them by e-mail at the same time. You want to publish the distribution list so that your colleagues can also use the created distribution list.

1. Click > *Your name* > *User Settings* > *Distribution Lists*.
2. Choose *Create*.

This opens a new dialog box.

3. Provide a name for the distribution list.
4. Use the *Recipient* search field to select the users that you want to add to the distribution list.
5. Activate the *Publish distribution list* checkbox to make the distribution list available to other users.
6. Click *Save*.

The distribution list has been created and is listed under the name that you entered in the table overview.

4 Notifications

The system can be used to send e-mails when a variety of events occur. If you have activated this setting in your settings, notifications are sent to you by e-mail (see chapter 3).

You can also access your messages by clicking the icon 38 in the caption bar. The number indicates how many unread messages you have.

When you click on the bell, a list opens that shows your latest messages. In the list below, click *Show all* to get an overview of all notifications. The overview includes notifications from the following modules: Administration, Media Pool, Brand Template Builder, Job Manager, Event Manager, Marketing Data Hub and Review Manager. Unread notifications are displayed in bold.

Filters

You can apply filter functions to the overview of notifications on the left-hand side. You have the following options:

- *Keyword*: only notifications containing the keyword in the sender or the subject will be displayed.
- *Status*: you can decide to display read notifications, unread notifications or notifications with any status.
- *Module*: only notifications from specific modules will be displayed. To remove a module filter, click *Remove selection* below the dropdown list.
- *Date*: notifications are only displayed if they were sent during a specific period. To remove a date filter, click *Remove date*.

If you use more than one filter, notifications will only be displayed if they meet the requirements of all of the filters, e.g. unread notifications from the *Job Manager* module sent between September 1, 2018 and September 20, 2018.

Display

Above the overview you can reach the display functions on the right. You have the following options:

- *Select number of notifications per page*: you can choose between 5, 15, 25 or 50 notifications per page.
- *Arrow keys*: use these to move between pages.

You can also click the header of the *Date* column to sort notifications in ascending or descending order based on when they were received.

Associated tasks

- Opening a notification (see chapter 4.1)
- Changing a status (see chapter 4.2)
- Deleting a notification (see chapter 4.3)
- Selecting and editing multiple notifications (see chapter 0)

4.1 Open Notification

1. Open your overview of notifications.
2. Look for a specific message by filtering the overview.
3. Click the row the notification is on.

The notification opens on the right-hand side of the screen.
To close the notification again, choose X in the top right corner of the notification.

4.2 Change Status

1. Open your overview of notifications.
2. Look for a specific message by filtering the overview.
3. Place your cursor over the row the notification is on.

Icons will be displayed on the right-hand side of the row.

4. Click the letter icon.

You have changed the status of the notification.

If you would like to change the status of multiple notifications at once, please refer to Select and edit multiple notifications on page 16.

4.3 Delete Notification

1. Open your overview of notifications.
2. Look for a specific message by filtering the overview.
3. Place your cursor over the row the notification is on.

Icons will be displayed on the right-hand side of the row.

4. Click the trash can icon.

You have deleted the notification. You can also delete a notification after opening it. For more information, please refer to Open notification on page 16.

If you would like to delete multiple notifications at once, please refer to Select and edit multiple notifications on page 16.

4.4 Select and Edit Multiple Notifications

You can delete multiple notifications or change their status at the same time.

1. Open your overview of notifications.
2. Look for the messages by filtering the overview.
3. Check the boxes for the notifications you would like to edit in the first column.

   The actions which you can apply to the selected notifications (Delete and Change status) will be displayed above the overview.

4. Click the action you would like to perform.

You have applied the action to multiple notifications.