Print Marketing for End Users

Table of Contents

Introduction

> **Note**
> This guide is designed to walk end users through the print marketing product feature.

Print marketing materials are essential to building up your brand. They help to grow your business by allowing you to easily present marketing material to a wide range of customers and audience members through certain delivery methods.

Common print marketing assets include the following:

- Print flyers
- Direct mail postcards
- EDDM postcards
- Infographics

Commonly Used Terms

Name	Description
Co-Branded	When two or more brands of companies collaborate on advertising efforts to help promote their business. Co-branded materials involve two user profiles on a marketing asset. • **Ex:** A real estate agent can work closely with a loan officer when creating certain marketing content.
Single Branded	Print assets that only advertise one user profile.
Direct Mail Postcards	Postcard print asset that is sent to a set list or group of contacts. Direct mail postcards are an effective tool when wanting to generate awareness and interest on certain listings.
Every Door Direct Email (EDDM)	Helps you promote your business by sending postcards, flyers, and coupons to specific customers within a canvased postal route area.
Print Flyer	A marketing print piece that helps to promote your business.
Cost Split	A co-marketed print piece where the cost is split between the two parties.
Infographics	Visual images/charts/diagrams that help customers understand the information you are trying to display.

Co-Branded vs Single Branded

Co-branded print materials are assets that include contact information of members of more than one business. For example, a loan officer and a real estate agent could co-market on a print flyer. This flyer is then sent to all possible home buyers while promoting both businesses through the advertisement.

Single branded print marketing are print assets that *do not* advertise multiple businesses. These materials only display one user profile.

How to Locate Different Print Materials

Note
Your marketing administrator is responsible for the creation of your print materials. Please reach out to them if you cannot find the specific piece you are looking for.

1. On the left navigation, click **Print Marketing > Create New**.

- **Note:** You are creating a new variation from a marketing asset template.
2. At the top of the page, use the search bar to find a specific template.
3. Use keywords, tags, and folders to help narrow your search.
4. Once you find your template, on the right side of the page, click **Actions > Select**.

> **Tip**
> Co-branded print material usually have "Co-Branded" or "CB" tags in the title. You can also tell if a print piece is co-branded if it has a cost split assigned to it.
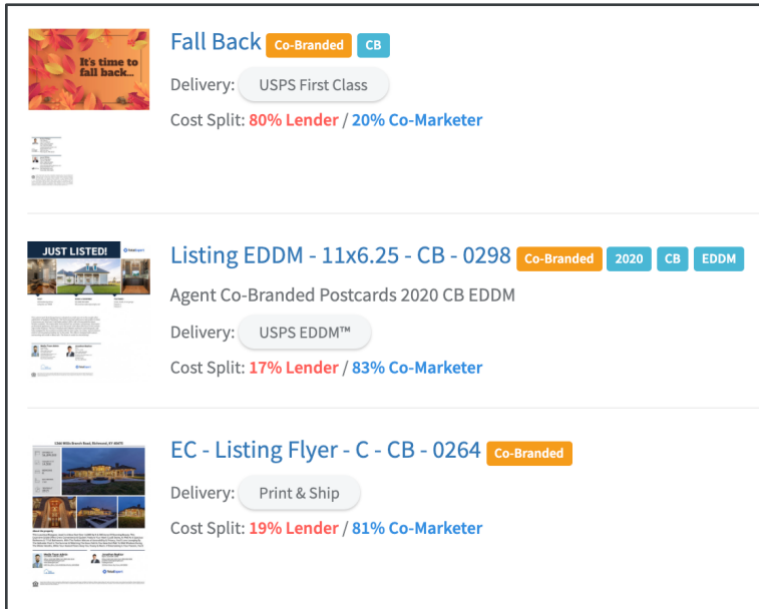
## How to Create Co-Branded Print Materials

> **Note**
> Certain template options do not show listing information.

Your co-marketing partner must first be connected to you in your Total Expert platform before you can add them to print material. Two loan officers are not able to collaborate on one print piece.

1. On the left navigation, click **Print Marketing > Create New**.
   - This page shows you all of the material available to you by your organization or from your co-marketing partner.
2. Use the search bar or tags to look for infographics, print flyers, postcards, or EDDM postcards.
3. Next to the print material you want to use, click **Actions > Select**.
4. Under *Step 1: Select Media Options*, choose a co-marketing partner.
   - This populates your co-marketer's listings.
5. Under *Step 2: Search for a Listing to Market*, search by MLS#, Listing Status, OR select a state, location, and agent name.
   - **Note:** Some print material does not require listing information and will not show this option.
6. On the right side of the page, under a listing, click **Select**.
7. At the top of the page, click **Customize and Publish**.
   - (Optional) Update the template.

8. Once satisfied, click **Save First Draft**.
   - You receive a notification if your print material needs to be approved by your admin, however some print pieces require you to request approval instead.
9. If you have the option to publish your document, click **Publish**.
   - A pop-up screen appears letting you know you are not able to make changes to the piece once published.
10. If you only have the option to request approval, click **Request Approval**.
    - A pop-up screen appears letting you know you are not able to make changes to the piece once published.
11. Choose **Ok** to proceed.
    - The marketing material will now be added to your saved folder.
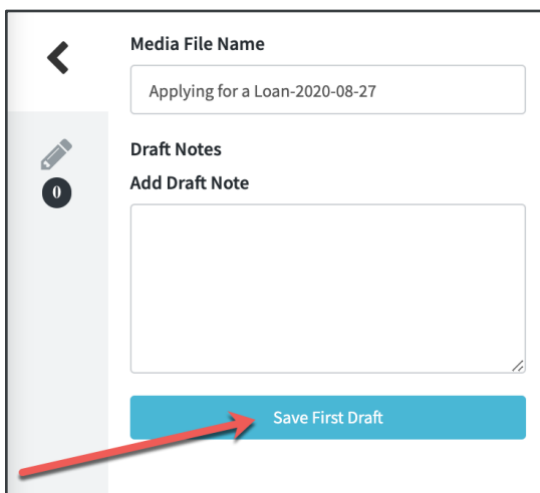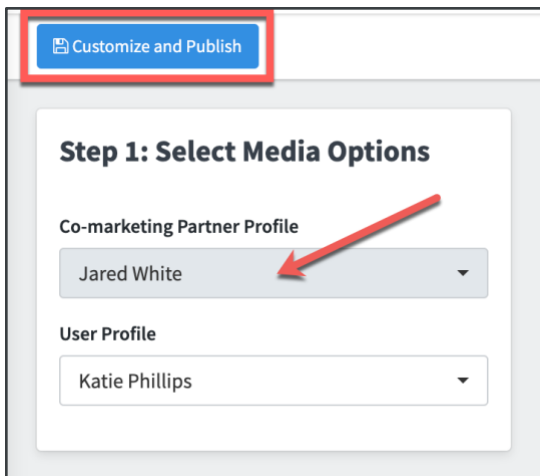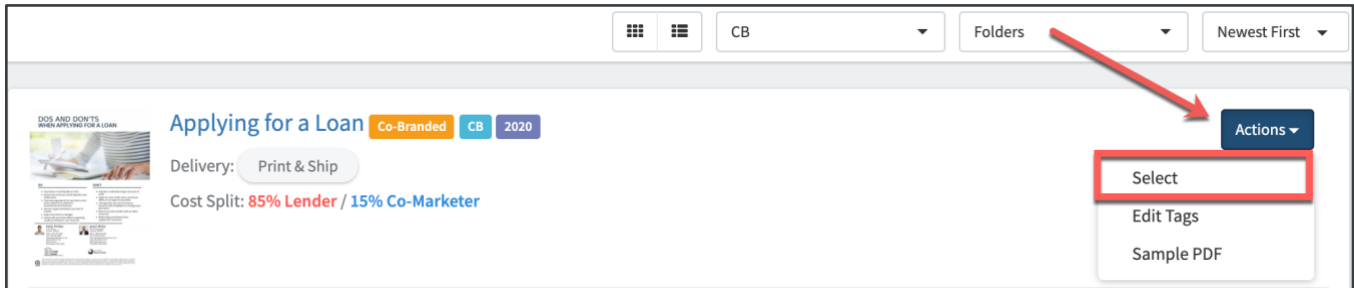
How to Create Single Branded Materials

1. On the left navigation, click **Print Marketing > Create New**.
   - This page shows all of the material available to you by your organization or from your co-marketing partner.
2. Use the search bar or tags to look for infographics, print flyers, postcards, or EDDM postcards.
3. Next to the print material you want to use, click **Actions > Select**.
4. Under *Step 1: Select Media Options*, choose the user profile then click **Customize and Publish**.
   - (Optional) Update the template.
5. Once satisfied, click **Save First Draft**.
   - You receive a notification if your print material needs to be approved by your admin, however some print pieces require you to request approval instead.
6. If you have the option to publish your document, click **Publish**.
   - A pop-up screen appears letting you know you are not able to make changes to the piece once published.
7. If you only have the option to request approval, click **Request Approval**.
   - A pop-up screen appears letting you know you are not able to make changes to the piece once published.
8. Choose **Ok** to proceed.

- The marketing material will now be added to your saved folder.

How to Edit Print Marketing Materials

> **Note**
> The material must be in a draft or pending approval status. You cannot edit published print marketing material.
> Some print materials cannot be edited. Please reach out to your marketing administrator for assistance.

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by draft or pending approval materials.
3. Use the search bar, tags, or folders to find specific content.
4. Next to the print material you want to update, click **Actions > Edit/Publish**.
5. Update your content.
6. Choose **Save Draft** OR **Publish**.

Print Marketing Payments and Orders

The price of a co-marketed print asset is split between both parties.

- **Ex:** The loan officer might pay 65% of the flyer, while the real estate agent only pays 35%.

Your marketing administrator creates the split cost. Please reach out to your marketing administrator if you have any questions regarding the split cost.

> **Warning**
> There is not a way to have the other party approve orders that are submitted if the marketing piece is 100% paid by one party.

How to Quickly View Co-Branded Split Costs

> **Note**
> This is just to get a good sense of what the cost breakdown is. You are not able to pay for the marketing order through this process.

1. On the left navigation, click **Print Marketing > Create New**.
2. On the left side of the page, filter by orderable material.
   - **Ex:** EDDM Postcards
3. Under the print piece, next to *Cost Split* is the breakdown of the lender percentage and the co-marketer percentage.

How to Pay for Print Marketing Orders

> **Note**
> Some organizations pay for marketing materials in full, however you may be responsible for a portion of the cost.

1. On the left navigation, click **Print Marketing > Orders**.
2. Under the *Actions* column, click the **three dots (…) > Pay [amount owed]**
   - **Note:** You are prompted to add a card if you do not have a credit card on file.
3. Proceed through the checkout screens.

> **Tip**
> Adding your card will not pay for your order. Please repeat steps 1 and 2 to pay.

How to Review My Print Material Orders

1. On the left navigation, click **Print Marketing > Orders**.
2. Under the *Actions* column, click the **three dots (…) > Review**.
3. This page outlines the following:
   - Order details
   - Payment details
   - Cost split information
   - Printable documentation and files
   - Featured user information

How to Decline Print Marketing Orders

> **Warning**
> This action cannot be undone!

1. On the left navigation, click **Print Marketing > Orders**.
2. Under the *Actions* column, click the **three dots (…) > Decline [amount owed]**
3. The order will be declined.

Direct Mail Postcards

Direct mail postcards allows you to send postcard print assets to specific contacts or groups.

How to Order Direct Mail Postcards

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the screen, filter by **Approved Direct Mail Postcards**.
3. Next to the print material you want to use, click **Actions > USPS First Class**.
4. Choose your distribution list.
   - Use filters to narrow down your search. The platform automatically excludes duplicate contacts.
   - **Note:** You may have to select a minimum amount of contacts to calculate your rates.
5. Next to the *Actions* column, click the checkbox to select all contacts within your group.
6. Under *Order - USPS*, click the button next to First Class.

7. Click **Calculate Rates**.
8. Review your cost breakdown, check the agreement box, and click **Submit Order**.

EDDM Postcards

Every door direct mail (EDDM) allows you to canvas every residence in a USPS postal route and is not customizable.

EDDM postcards can be more expensive than direct mail postcards as you are selecting hundreds of residents instead of specific contacts.

How to Order EDDM Postcards

Note
EDDM Postcards cannot be sent to PO boxes.

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by approved EDDM postcards.
3. Next to the print material you want to use, click **Actions > USPS EDDM™**.
4. In the search bar, enter your address and click **Search**.
   - (Optional) Adjust your radius setting.
5. Choose the zones you would like to send postcards to then click **Review Estimated Cost**.
   - Highlighting a zone with your cursor (green) gives you a breakdown of the zone under *Route Summary*.
   - Clicking the zone with your cursor (red) gives you a breakdown of the total route information under *Selection Summary*.
6. Check the box next to the payment agreement then click **Submit Order**.

With the current relationship we have with the USPS, we do not offer any distribution lists of the addresses where these postcards are sent to.

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Print Marketing Actions

How to Take Action on Print Marketing Material

Note
Your print material first needs to be approved by your marketing administrator before you can perform any publishing action.

Publishing your print marketing pieces allows you to broadcast your information out to your intended customer base.

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by approved material.
3. Next to the print material you want to use, click **Actions**.
4. Choose one of the following options:
   - **Generate a PDF (if applicable) –** Creates a PDF link that you can send to your co-marketing partner.
   - **Share via social media (if applicable) –** Share your material on Facebook, Twitter, or LinkedIn.
   - **Print & Ship (if applicable) –** Order a certain amount of prints to be shipped to a specific address.
   - **USPS EDDM™ (Specific to EDDM Postcards)** – Select a postal carrier zone on a map where you want to send postcards.
   - **Archive –** Removes file from your account.
   - **View Draft Notes –** Reveals any notes that were added to the material when drafted.
   - **Recreate (if applicable) –** Allows you to recreate the asset in a draft-state to make changes.
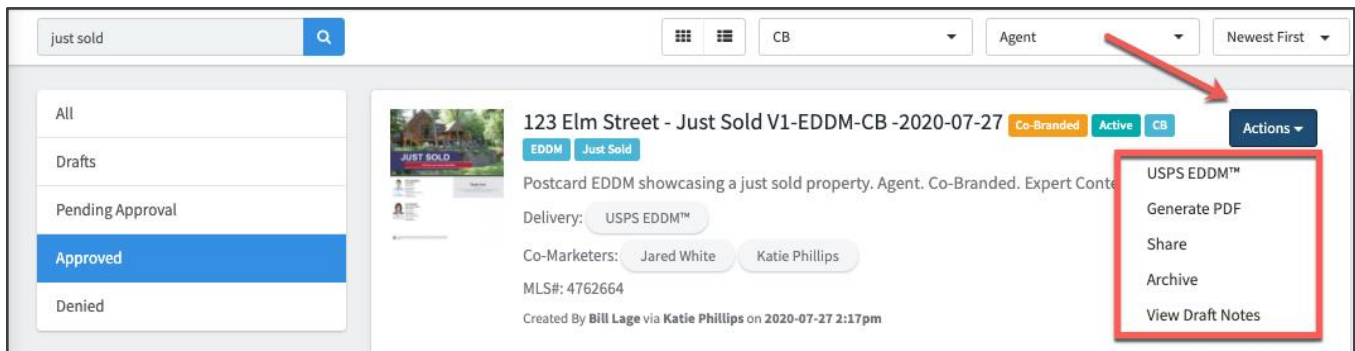
How to Generate a PDF

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by approved materials.
3. Next to the print material, click **Actions > Generate PDF**.
   - A new tab appears with your generated PDF to print or share.

Tip
Copying the URL of the PDF is an easy way to quickly send the marketing asset to your customers. Downloading the PDF allows you to upload/attach the asset to an email.

How to Share to Social Media

> **Note**
> Some marketing materials are not able to be posted to social media. Please reach out to your marketing administrator for assistance.

The three different social media platforms you can share your content to are:

- LinkedIn
- Facebook
- Twitter

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by approved materials.
3. Next to the print material you want to use, click **Actions > Share**.
   - A pop-up screen appears.
4. Check the box next to each social media integration.
5. Connect your social media integrations by clicking **Connect**.
   - (Optional) Feel free to choose a date, time, and removal day if you don't want to post anything right now.
6. Click **Schedule** OR **Post Now**.
   - **Note:** You can only choose schedule if you picked a post date, post time, and removal date.

How to Print and Ship Marketing Material

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by approved materials.
3. Next to the print material you want to use, click **Actions > Print & Ship**.
   - A pop-up screen appears.
4. Input the address you want the prints to be sent to.
5. Update the order quantity (amount of prints that should be shipped)
6. Click **Calculate Rates**.
7. Review the rate cost split, check the agreement, then click **Submit Order**.

Order - Print And Ship		Cost Information	

Order - Print And Ship

Full Name	Katie Phillips
Shipping Address	100 First Ave
Address 2	
City	Minneapolis
State	Minnesota
Zip Code	55455
Order Quantity	○ 25 ● 50 ○ 100 ○ 250 ○ 500 ○ 750 ○ 1000

Calculate Rates

Cost Information

Printed material will be shipped back to the provided address. A tracking number will be available under print orders after order has been shipped.

Total cost includes shipping charge and applicable sales tax.

Total Quantity	50
Print Cost	$62.64
Shipping & Handling	$0.00
Total Cost	**$62.64**
Cost Breakdown	
Jet Carter	$8.77
Katie Phillips	$53.87
Organization Total	$0.00

☑ By checking this box, you indicate that you have the authority to enter into this payment agreement with Total Expert. **See details**.

Submit Order

How to Archive Print Marketing Material

Note
You will no longer have access to the material once archived.

Archived print pieces still show in the marketing compliance reports. Archived pieces also show in the approved media page and are counted in the marketing overview reports.

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by approved materials.
3. Next to the print material, click **Actions > Archive**.
4. Click **Ok** to confirm.

How to View Marketing Draft Notes

1. On the left navigation, click **Print Marketing > Saved**.
2. On the left side of the page, filter by approved materials.
3. Next to the print material, click **Actions > View Draft Notes**.

Tip
Feel free to print the notes by clicking **Print**.

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How to Delete Print Marketing Materials

Note

You are only allowed to delete print material in either a draft or pending approval status.

1. On the left navigation, click **Print Marketing > Saved**.
2. Sort by drafts or pending approval material.
3. On the right side of the page, click **Actions > Delete**.
   - A pop-up screen appears.
4. Choose **Ok** to confirm.

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