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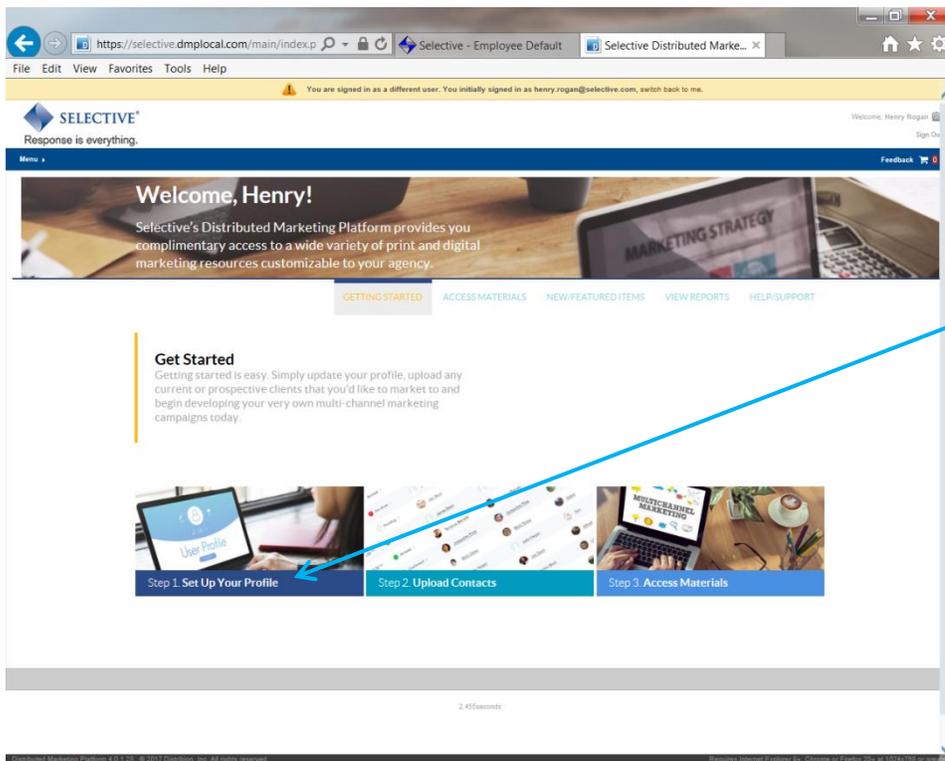
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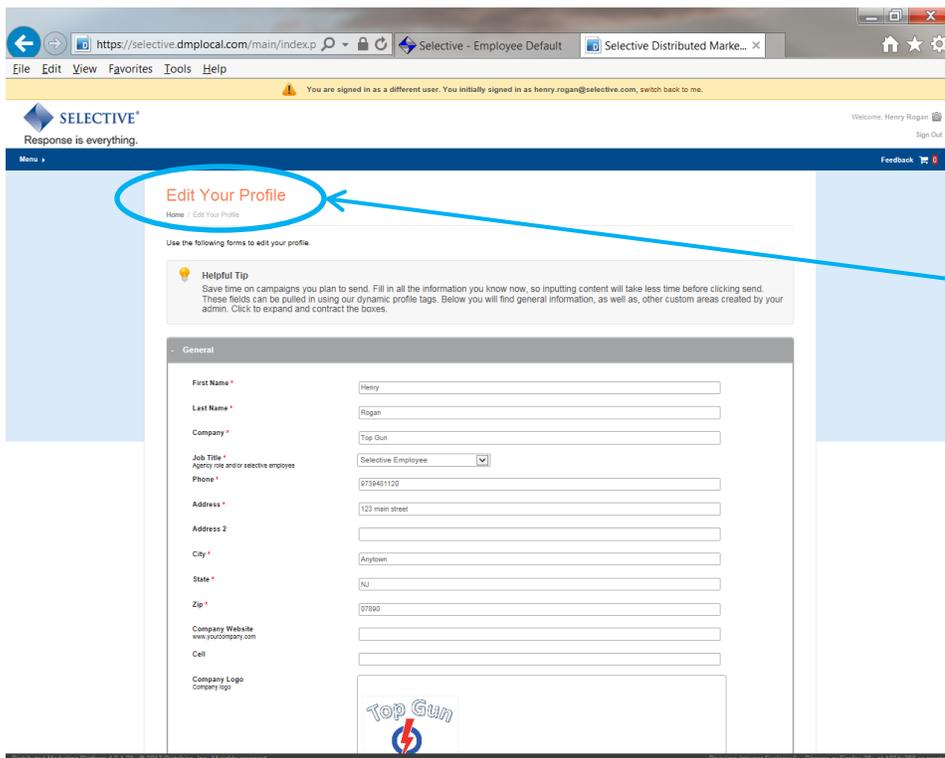
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Setting up your profile

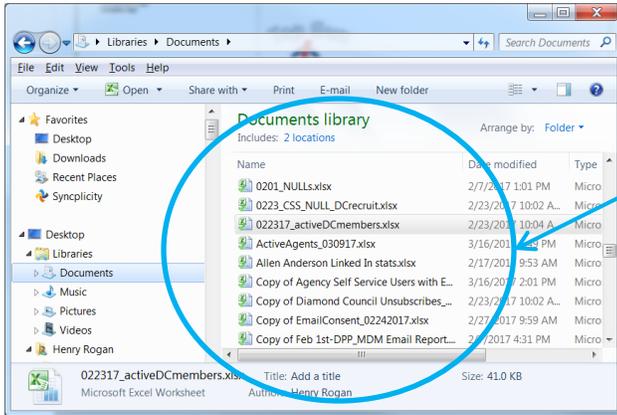


Click here to go to your profile page

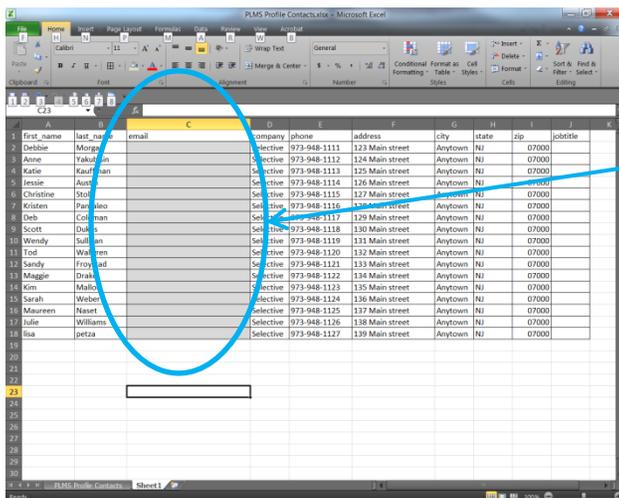


- Here you can edit all of the fields in your profile.
- Fields marked with a red star are REQUIRED.
- The more information that is uploaded, the better the user experience will be.
- Uploading a your logo here, will make customization quicker and easier.

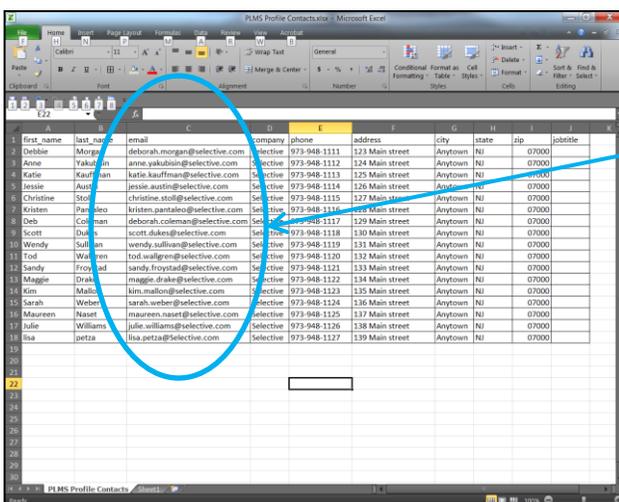
Importing Contacts



Locate the file that has the contacts you want to upload and open the file

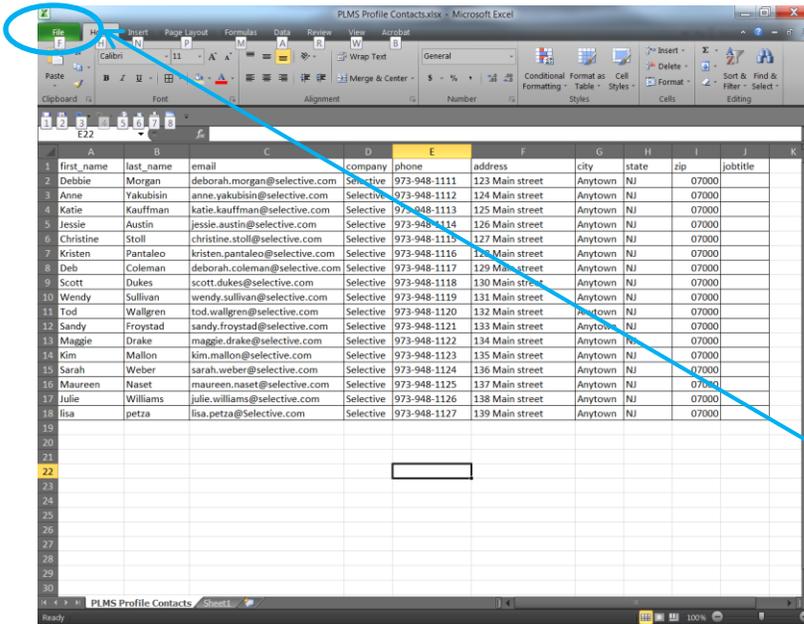


- If the list is for Direct Mail, it is okay to have no email addresses as seen here.
- Since all contact records require an email address, when loading a direct mail ONLY file, the system will add “dummy” email addresses.



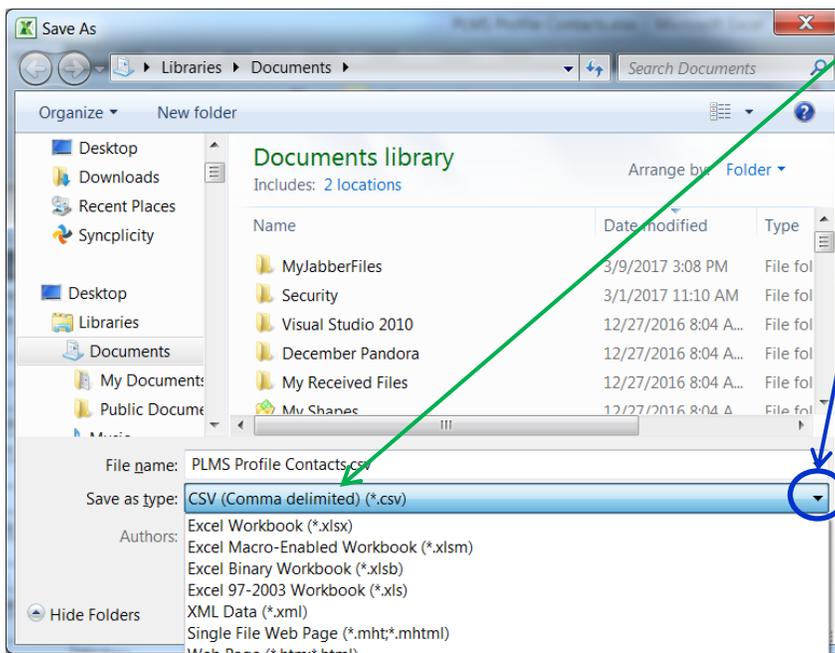
- If the list is going to be used for an email marketing campaign, make sure all fields have an email address.

Importing Contacts

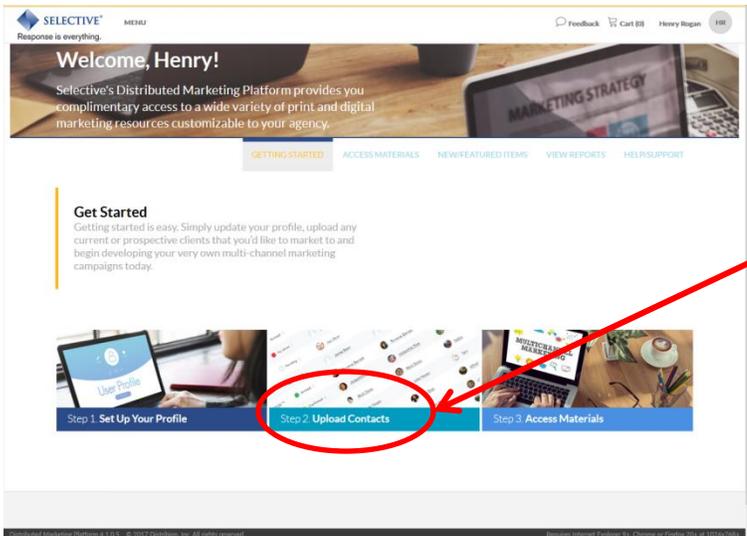


In order to import your contact records, they must be saved in a comma delimited (CSV) format.

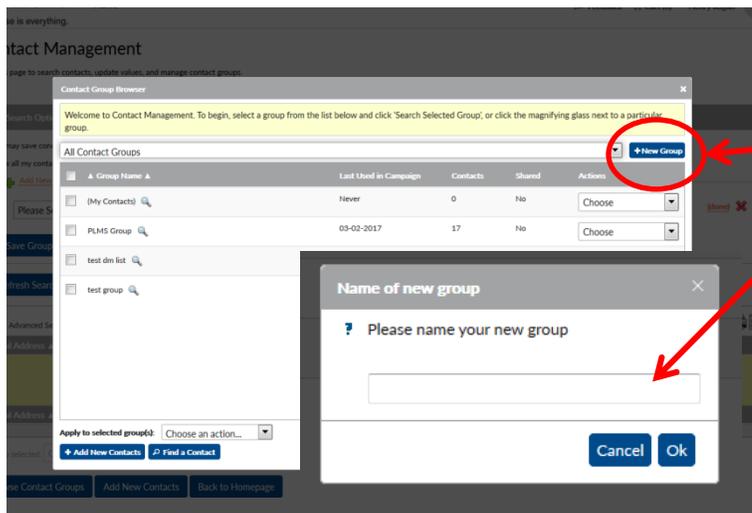
1. Click "file", then select "save as".
2. Open the "Save as type" drop down by clicking the down arrow.
3. Select "CSV (Comma delimited) (*.csv)".
4. Name your file in the "file name" field.
5. Click Save.



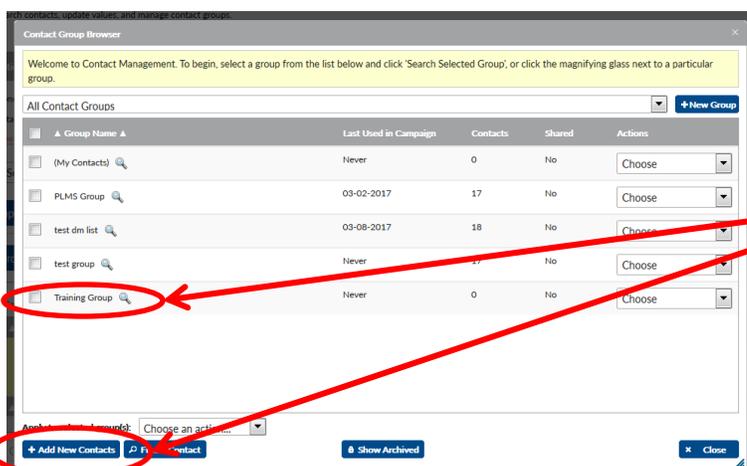
Importing Contacts



After you have created your CSV file, go to the home page and click on the “Upload Contacts” link.

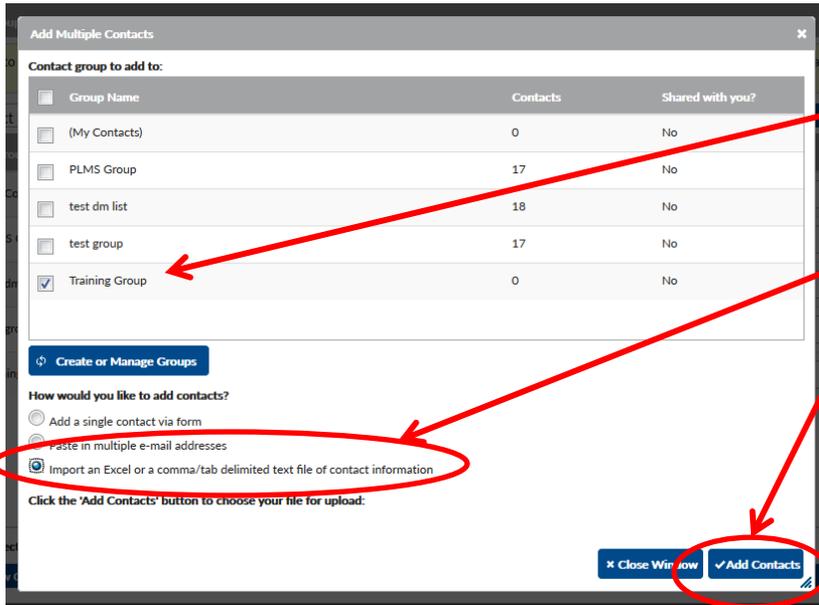


After the Contact Management screen opens, the Contact Group Browser opens. Click on the “+New Group” button. Next, you will name your new list and click OK. You will receive a message that your group was created with “0” contacts.

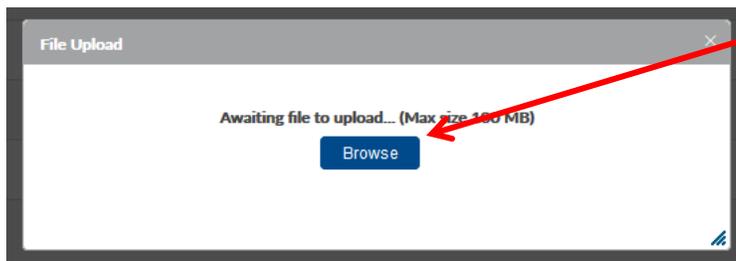


From this window, find your new list name, Click the box next to the name, and at the bottom of the window, click “+ Add New Contacts”

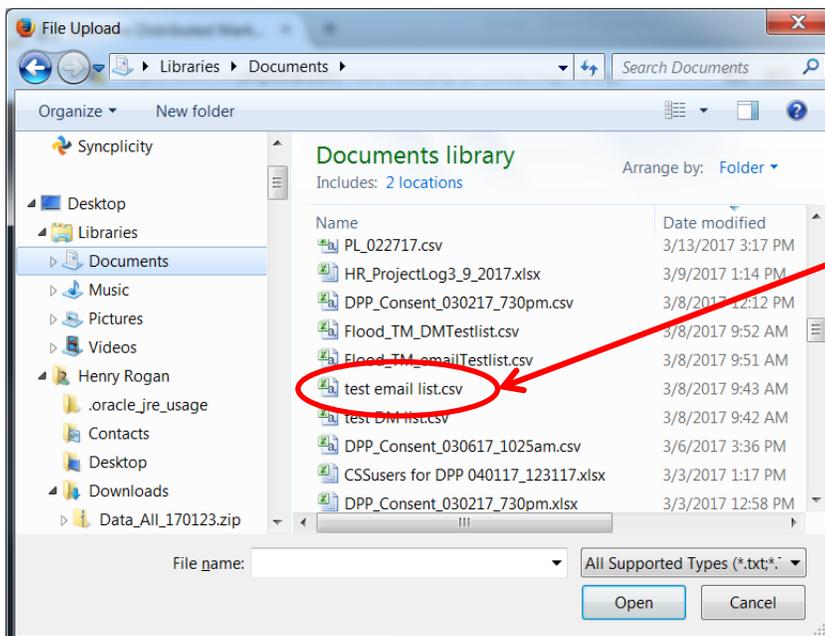
Importing Contacts



On the “Add Multiple Contacts” window, make sure your list is selected, choose the correct radial button, then click the “Add Contacts” button to begin the upload.



Click the “Browse Button”



Locate the correct list from your documents folder and double click it to continue the upload.

Importing Contacts

You have reached the “Map CSV Columns” window. This is the most important step in the upload process. This is where you will map the data in your contact file to the correct fields in the database. Be careful to select the correct fields that match your data.

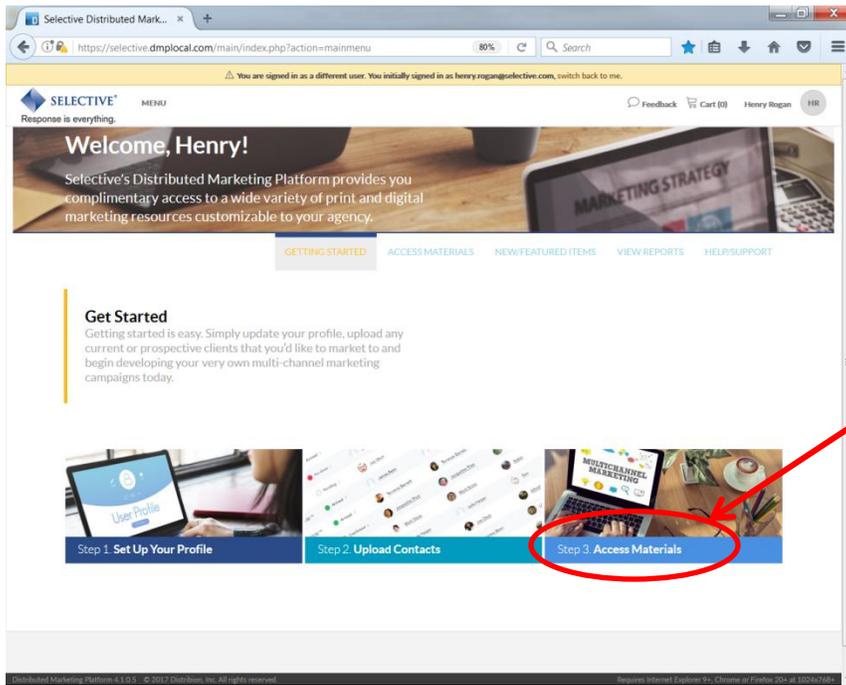
****Note:** there are 3 sets of address fields, if you are using the list for mailing, then you must map your address data to the “mailing” fields from the drop downs.

ID	AGENCY_NO	AGENCY_NAME
4759	1185200000	EASTERN SHORE ASSOCIATES
3306	2406600000	CHAP ARNOLD INSURANCE AGENCY INC
4052	2406000000	COUNTY WIDE INS AND REAL ESTATE AG INC
11996	9257000000	STARR-MATHEWS & AGENCY INC

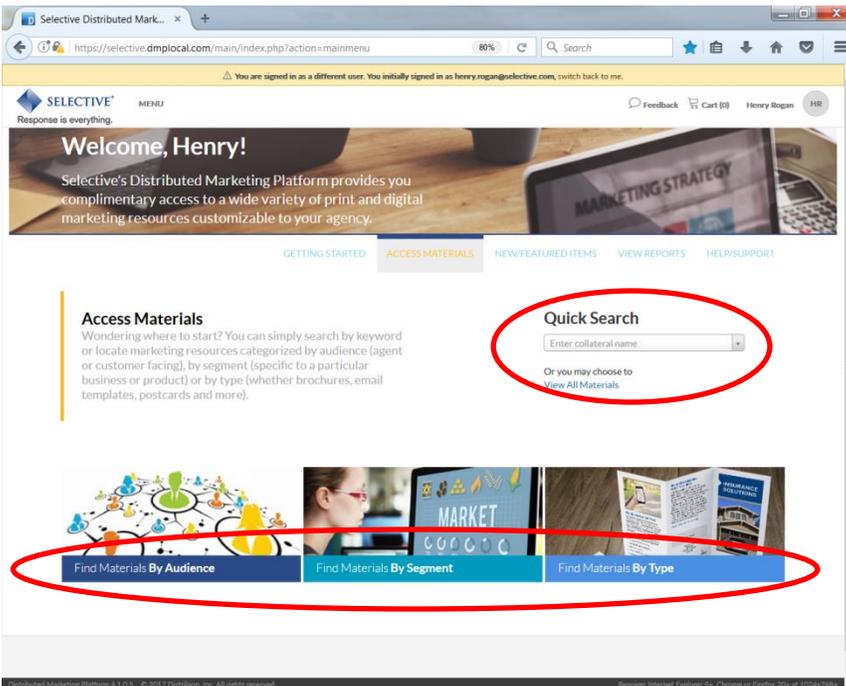
Once you have completed mapping the fields correctly, click the “Add Contacts” Button. This completes the process of the upload.

****Note:** If the list is a direct mail ONLY file, then you must click the “Create fake e-mails for contacts without emails” box in order to have the list upload. *The system recognizes ALL contacts via an email address.*

Accessing the Marketing Asset Manager



From the home screen, click on the "Access Materials" link



The DMP offers many options when searching for materials. You can type the name of the item in the quick search bar, click the "View All Materials" link", or click either of the 3 links at the bottom to search by Audience, Segment, or Type.

Accessing the Marketing Asset Manager

In the Marketing Asset Manager, you can continue your search by using:

The Navigation Options on the left or The Search Bar

The screenshot displays the Selective DMP Marketing Asset Manager interface. A red oval highlights the search bar at the top, which contains the text "Search". A red arrow points from the search bar to the left-hand navigation menu. The navigation menu is a dark sidebar with a white background for the text, containing the following sections:

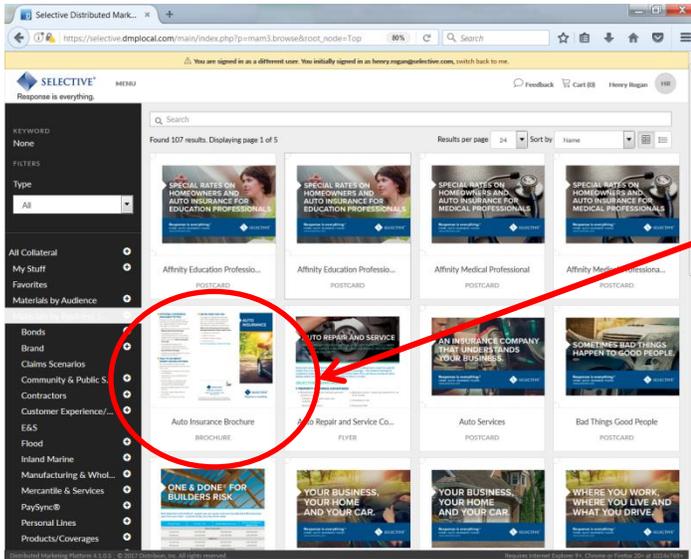
- KEYWORD: None
- FILTERS: Type (All)
- Materials by Audience:
 - All Collateral
 - My Stuff
 - Favorites
 - Materials by Audience
- Materials by Business S...:
 - Bonds
 - Brand
 - Claims Scenarios
 - Community & Public S...
 - Contractors
 - Customer Experience/...
 - E&S
 - Flood
 - Inland Marine
 - Manufacturing & Whol...
 - Mercantile & Services
 - PaySync®
 - Personal Lines
 - Products/Coverages

The main content area shows a grid of 12 marketing assets. The first row contains four "Affinity Education Professional" and "Affinity Medical Professional" postcards. The second row contains an "Auto Insurance Brochure", an "Auto Repair and Service Co..." flyer, "Auto Services" postcard, and "Bad Things Good People" postcard. The third row contains "ONE & DONE® FOR BUILDERS RISK", "YOUR BUSINESS, YOUR HOME AND YOUR CAR.", "YOUR BUSINESS, YOUR HOME AND YOUR CAR.", and "WHERE YOU WORK, WHERE YOU LIVE AND WHAT YOU DRIVE".

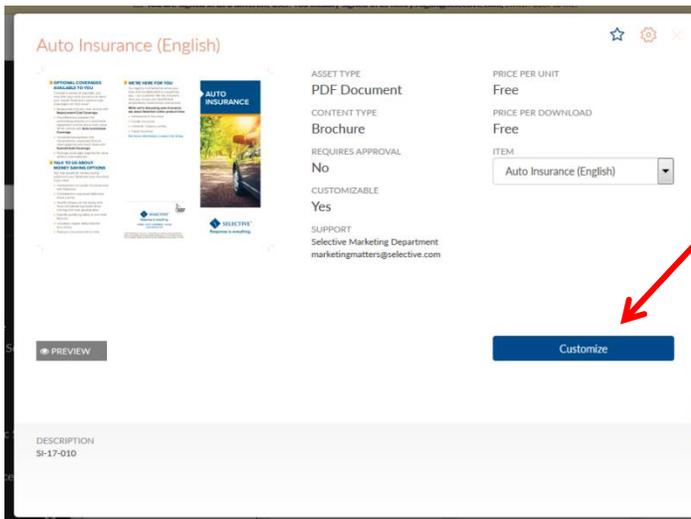
At the bottom of the page, there is a footer with the text: "Distributed Marketing Platform 4.1.1.5 © 2017 Distribution, Inc. All rights reserved." and "Requires Internet Explorer 9+, Chrome or Firefox 20+ at 1024x768+".

Customizing And Distributing A Marketing Piece

Download and Print



Locate the piece you want to customize



Click the "Customize" button

Customizing And Distributing A Marketing Piece

Download and Print

Select the area you want to customize

Info will be defaulted based on the current user profile that you are logged in with.

Page 1 Customizable Areas

- Agency Info
- Agency Logo

OPTIONAL COVERAGES AVAILABLE TO YOU

WE'RE HERE FOR YOU

TALK TO US ABOUT MONEY SAVING OPTIONS

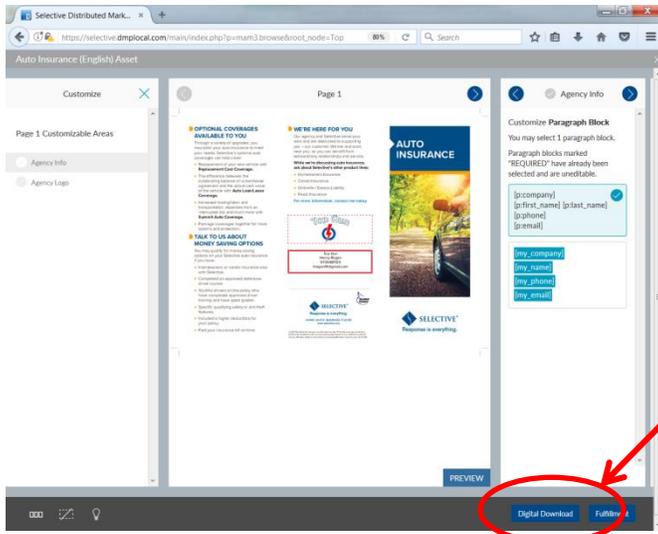
PREVIEW

Digital Download Fulfillment

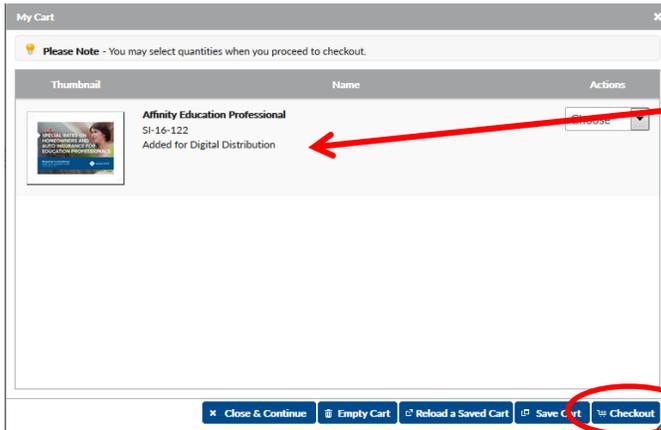
The area that you select will have the red highlighted box around it.

Use these fields to update the piece with the info from the agent you are setting this piece up for.

Customizing And Distributing A Marketing Piece *Download and Print*

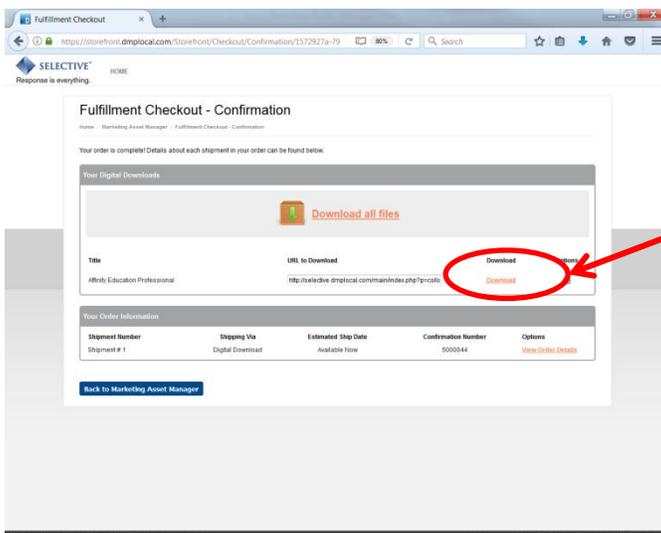


Once you have completed customizing the piece, *FOR PRINTING*, click the “Digital Download” button



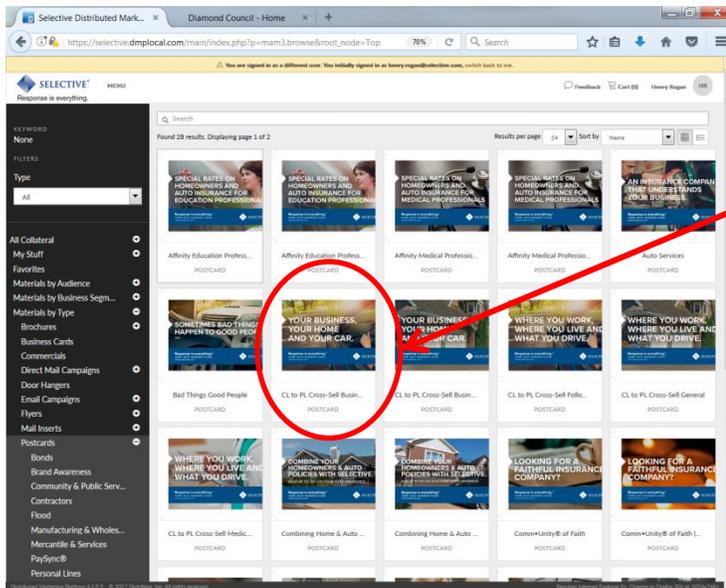
In the cart, your piece should be labeled as “Added for Digital Distribution”

At the cart, you will click the “Checkout” button

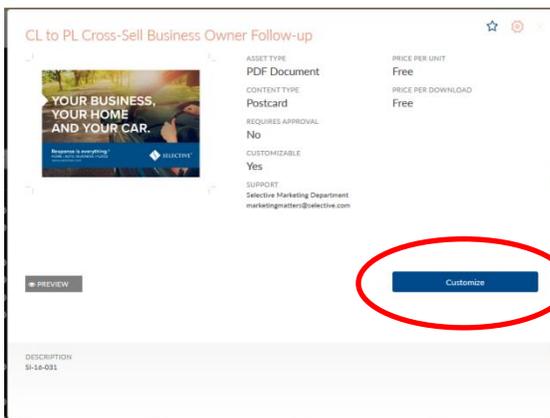


You have reached the fulfillment screen. From here you can click the download button and your piece will open as a pdf that can be saved and printed.

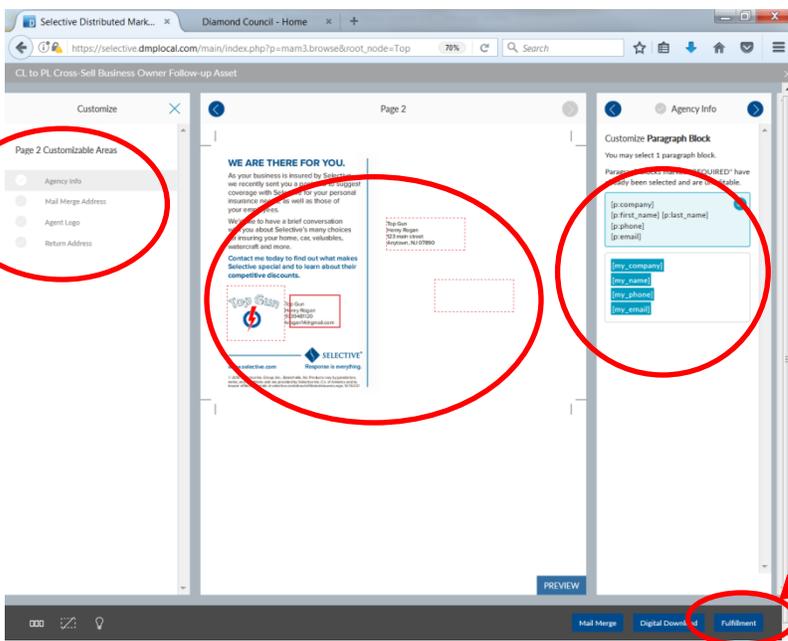
Customizing And Distributing A Marketing Piece For Bulk Mail



Locate the piece you want to customize and have sent in bulk.



Click the "Customize" button



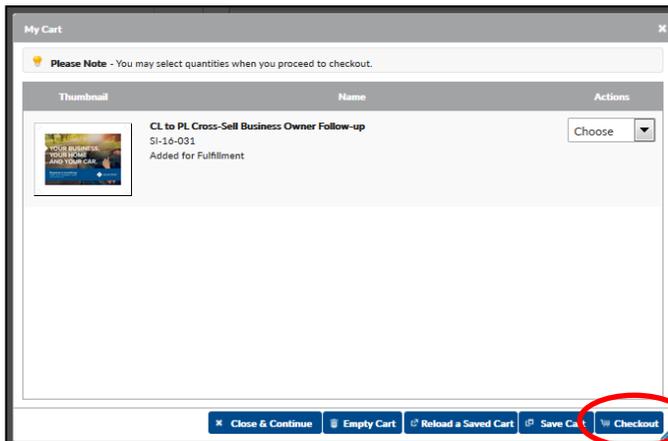
Customize all available fields using the tool:

- Agency info
- Agent Logo
- Return Address

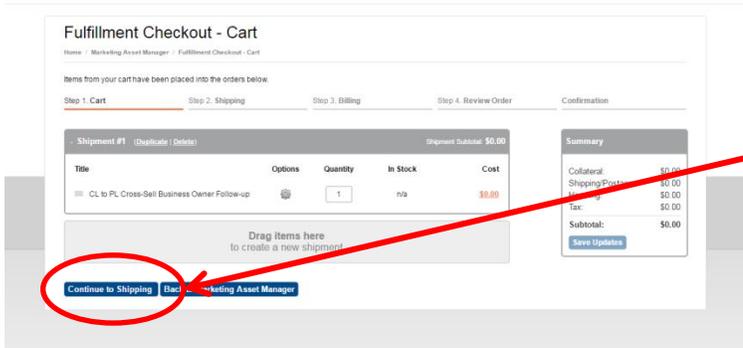
(for mail pieces).

Then click the "Fulfillment" button

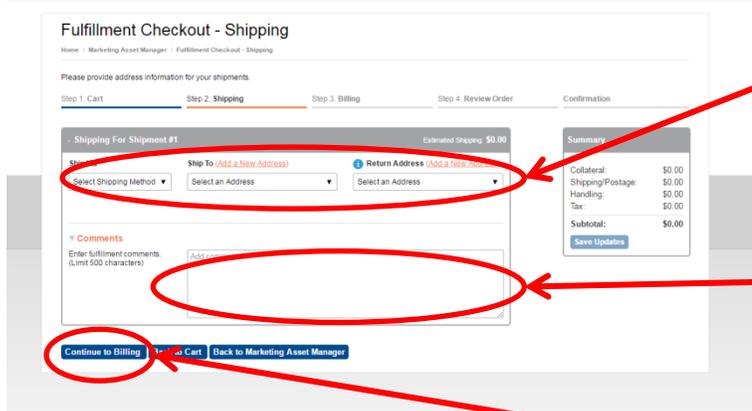
Customizing And Distributing A Marketing Piece For Bulk Mail



From the "Cart" click the "Checkout" button



At the Checkout cart you can review your order, then click the "Continue To Shipping" button.



At the Checkout Shipping screen you will:

1. Select "Standard Shipping"
2. Select or "add a new" "ship to" address.
3. Select or "add a new" "return Address"

Then, you can add comments as needed for the fulfillment house.

Then click the "Continue to Billing" button

Customizing And Distributing A Marketing Piece For Bulk Mail

At the Checkout – Review screen, you can review the details one last time. Then click the “I accept the terms and conditions”

Fulfillment Checkout - Review

Home / Marketing Asset Manager / Fulfillment Checkout - Review

Please review your order before submitting.

Step 1. Cart Step 2. Shipping Step 3. Billing **Step 4. Review Order** Confirmation

Your Contact Information

Please provide your contact information in case we need to contact you about your order.

Henry Rogan
henry.rogan@selective.com
Phone Number (ex. 123-123-1234)

Summary

Collateral:	\$0.00
Shipping/Postage:	\$0.00
Handling:	\$0.00
Tax:	\$0.00
Subtotal:	\$0.00

[Save Updates](#)

Terms and Conditions

Your order will ship within 3-5 business days from the date the order was placed.

If you need your order expedited or an item quantity increased, please send your request to marketingportal@selective.com, with a copy of your order.

I accept the Terms and Conditions

Details for Shipment #1 Shipment Total: \$0.00

Title	Quantity	Cost
CL to PL Cross-Sell Business Owner Follow-up (Preview)	1	\$0.00

Shipping

Ship Via	Ship to	Collateral: \$0.00
Standard Shipping	40 Wantage Ave Branchville, NJ 07890 US	Shipping/Postage: \$0.00
Return address		Handling: \$0.00
40 Wantage Ave Branchville, NJ 07890 US		Tax: \$0.00
		Total: \$0.00

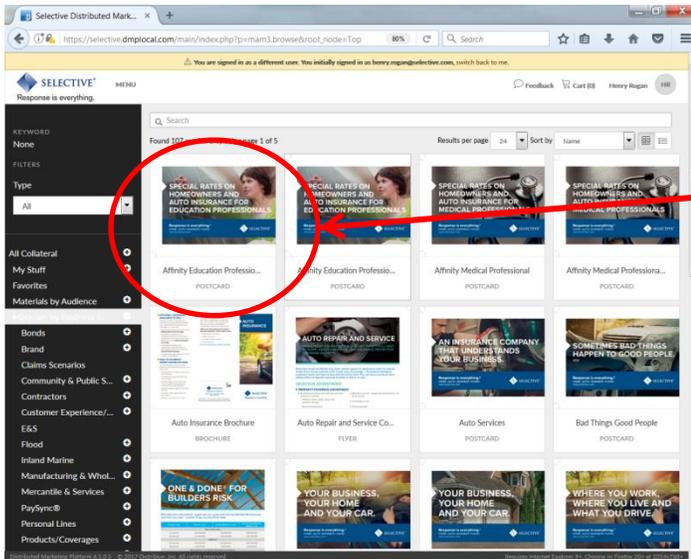
Comments

This is a Test Order DO NOT SHIP

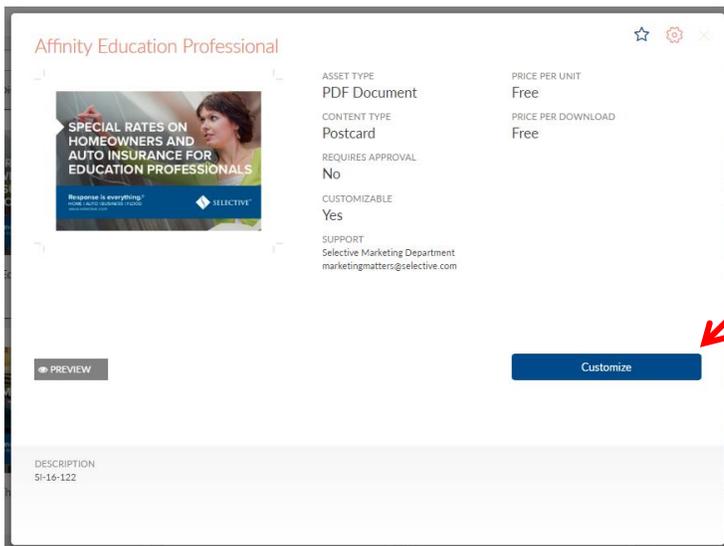
[Submit Order](#) [Back to Billing](#) [Back to Marketing Asset Manager](#)

Once you have reviewed your order and clicked the acceptance of the terms and conditions, you will click the “submit” button to complete your order.

Customizing And Distributing A Marketing Piece *For Mail Merge – Direct Mail*



Locate the piece you want to customize



Click the "Customize" button

Customizing And Distributing A Marketing Piece *For Mail Merge – Direct Mail*

Select the area you want to customize

Info will be defaulted based on the current user profile that you are logged in with.

The area that you select will have the red highlighted box around it.

Mail Merge Digital Download Fulfillment

Use these fields to update the piece with the info from the agent you are setting this piece up for.

Once you have completed the customization, click the "Mail Merge" button

Customizing And Distributing A Marketing Piece For Mail Merge – Direct Mail

The screenshot shows a web browser window with the URL <https://selective.dmplocal.com/main/index.php?p=mam3.browse>. The page title is "Affinity Education Professional". On the left, there is a preview of a marketing piece titled "PROFESSIONAL PEOPLE DESERVE PROFESSIONAL COVERAGE" for Henry Rogan. The main content area is titled "Select Contacts for Direct Mail Merge". It includes a summary of contact counts: Ready to Mail (0), Invalid Contacts (0), Skipped Contacts (0), and Document Warnings (0). Below this is a table with columns for First Name, Last Name, Address Line 1, Address Line 2, City, State, and ZIP. The table is currently empty, with a message: "You have not added any contacts. Please add contact(s).". At the bottom of the table area, there are three buttons: "Add Contact(s)", "Add Group(s)", and "Manage My Contacts". A red arrow points to the "Add Group(s)" button. Other buttons at the bottom include "Back to Customization Options", "Add to Cart for Mail Merge", "Add to Cart for Download/E-Mails", and "Add To Cart for Fulfillment".

From “Contacts for Direct Mail Merge” screen, click the “Add Group(s)” button. You will receive a pop up window where you can select a group or groups to add to your mail merge. Be sure to select a group where you have mailing contact field info. Then click the “Add Selected Groups” button

The screenshot shows a pop-up window titled "Add Group(s) for Mail Merge". It has a "Show:" dropdown set to "All Contact Groups". Below is a table with columns for Group Name, # of Contacts, and Shared. A red circle highlights the "Group Name" column. A red arrow points from the "Add Group(s)" button in the previous screenshot to the "Add Selected Group(s)" button at the bottom right of this pop-up.

Group Name	# of Contacts	Shared
henry.rogan@selective.com's groups(s)		
<input type="checkbox"/> ActiveAgents_030917	14259	No
<input type="checkbox"/> ActiveAgents_NotinNYCU	0	No
<input type="checkbox"/> Chamberlist no PA	135	No
<input type="checkbox"/> CL_022717	6990	No
<input type="checkbox"/> CL_022717 Group 1	6990	No
<input type="checkbox"/> CL_022717 Group 10	6973	No
<input type="checkbox"/> CL_022717 Group 2	7013	No
<input type="checkbox"/> CL_022717 Group 3	6995	No
<input type="checkbox"/> CL_022717 Group 4	6999	No
<input type="checkbox"/> CL_022717 Group 5	7001	No
<input type="checkbox"/> CL_022717 Group 6	6970	No

Customizing And Distributing A Marketing Piece *For Mail Merge – Direct Mail*

Once your groups have been loaded, you can spot check to make sure the data looks correct, then click the “Add to Cart For Mail Merge” button

The screenshot shows a web browser window with the URL <https://selective.dmplocal.com/main/index.php?p=mam3.browse>. The page title is "Affinity Education Professional Asset". The main content area is titled "Affinity Education Professional" and "Select Contacts for Direct Mail Merge". It includes a summary of contact counts: 17 Ready to Mail Contacts, 0 Invalid Contacts, 0 Skipped Contacts, and 0 Document Warnings. Below this is a table of contacts with columns for Actions, First Name, Last Name, Address Line 1, Address Line 2, City, State, and ZIP. The table shows 6 rows of data, with the first row being Warren Mckinney at 129 Main Street, Anytown, NJ, 11111. At the bottom of the contact list, there are buttons for "Add Contact(s)", "Add Group(s)", and "Manage My Contacts". A red arrow points from the text above to the "Add to Cart for Mail Merge" button at the bottom of the interface.

The screenshot shows a "My Cart" window. At the top, there is a "Please Note" message: "You may select quantities when you proceed to checkout." Below this is a table with columns for Thumbnail, Name, and Actions. The table contains one item: "Affinity Education Professional SI-16-122 Added for Direct Mail". The Actions column for this item has a "Choose" dropdown menu. At the bottom of the cart window, there are several buttons: "Close & Continue", "Empty Cart", "Reload a Saved Cart", "Save Cart", and "Checkout". A red arrow points from the text above to the "Checkout" button.

At the cart, click the “Checkout” button

Customizing And Distributing A Marketing Piece *For Mail Merge – Direct Mail*

Fulfillment Checkout - Cart

Home / Marketing Asset Manager / Fulfillment Checkout - Cart

Items from your cart have been placed into the orders below.

Step 1. **Cart** Step 2. Shipping Step 3. Billing Step 4. Review Order Confirmation

Title	Options	Quantity	In Stock	Cost
Affinity Education Professional		17	n/a	\$0.00

Drag items here to create a new shipment

Continue to Shipping [Back to Marketing Asset Manager](#)

Click the “Continue to Shipping” button

Fulfillment Checkout - Shipping

Home / Marketing Asset Manager / Fulfillment Checkout - Shipping

Please provide address information for your shipments.

Step 1. Cart Step 2. **Shipping** Step 3. Billing Step 4. Review Order Confirmation

This is a mail merge shipment. No shipment information is necessary.

Comments
Enter fulfillment comments. (Limit 500 characters)

Continue to Billing [Back to Cart](#) [Back to Marketing Asset Manager](#)

Add comments if needed, then click the “Continue to Billing” button

Fulfillment Checkout - Billing

Home / Marketing Asset Manager / Fulfillment Checkout - Billing

Select a payment method for each of your shipments below. If you have multiple payment methods available, you can divide the cost of a shipment across multiple payment types.

Step 1. Cart Step 2. Shipping Step 3. **Billing** Step 4. Review Order Confirmation

Payment Method	Payment Amount
Add Payment: <input type="text" value="Select a Billing Method"/>	\$ <input type="text" value="8.33"/>

Continue to Review [Back to Shipping](#) [Back to Marketing Asset Manager](#)

Click to “Add Payment”, add your credit card info.

Then click the “Continue to Review” button

Customizing And Distributing A Marketing Piece *For Mail Merge – Direct Mail*

At the Checkout – Review screen, you can review the details one last time. Then click the “I accept the terms and conditions”

Fulfillment Checkout - Review

Home / Marketing Asset Manager / Fulfillment Checkout - Review

Please review your order before submitting.

Step 1. Cart Step 2. Shipping Step 3. Billing **Step 4. Review Order** Confirmation

Your Contact Information

Please provide your contact information in case we need to contact you about your order.

Henry Rogan
henry.rogan@selective.com
Phone Number (ex. 123-123-1234)

Summary

Collateral:	\$0.00
Shipping/Postage:	\$0.00
Handling:	\$0.00
Tax:	\$0.00
Subtotal:	\$0.00

[Save Updates](#)

Terms and Conditions

Your order will ship within 3-5 business days from the date the order was placed.

If you need your order expedited or an item quantity increased, please send your request to marketingportal@selective.com, with a copy of your order.

I accept the Terms and Conditions

Details for Shipment #1 Shipment Total: \$0.00

Title	Quantity	Cost
CL to PL Cross-Sell Business Owner Follow-up (Preview)	1	\$0.00

Shipping

Ship Via	Ship to	Collateral:	\$0.00
Standard Shipping	40 Wantage Ave Branchville, NJ 07890 US	Shipping/Postage:	\$0.00
Return address		Handling:	\$0.00
40 Wantage Ave Branchville, NJ 07890 US		Tax:	\$0.00
		Total:	\$0.00

Comments

This is a Test Order DO NOT SHIP

[Submit Order](#) [Back to Billing](#) [Back to Marketing Asset Manager](#)

Once you have reviewed your order and clicked the acceptance of the terms and conditions, you will click the “submit” button to complete your order.