I've Just Signed Up, How Do I Get My Stuff In And Organized?

Learn how to create brand cards, add assets, assign those assets to categories & workspaces, and retrieve them using the filter.

First, thanks for signing up! It's great to have you here. Now let's get all that stuff in and organize it.

After reading this article you will know how to create brand cards, add assets, assign those assets to categories & workspaces, and retrieve those assets using the filter. So grab yourself a coffee, tea, or some other strong beverage, and follow the steps below.

This PDF is better viewed online where you can follow along step-by-step with animated GIFs not included here. To view this information online, [please click here](#).

Here are the steps this article takes to get your stuff into BrandKeep:
1. Create your brand cards
2. Add assets, and assign assets to a brand card
3. Create categories and assign assets to them
4. Create workspaces and assign assets to them

And one more step to learn how to retrieve those assets:
5. Using the filter to retrieve specific assets

These steps are just the beginning of how you can utilize BrandKeep. Be sure to view the other articles in the [knowledge base](#) to learn all about how BrandKeep can help you keep your stuff, and you, organized.

Step 1: Create your brand cards

The first thing to do is create cards for the brands you work with. Brand cards are your central location in BrandKeep where you store all a brand's content - files & image assets, contacts, tasks - which are accessible by all your team.
You can add a brand card one at a time, but it will be a more efficient use of your time to create all your brand's cards at one time.

How to use the import sheet to create multiple brands
Using the BrandKeep import sheet you can fill-in and import all brands at once.

Navigate to the Brands dashboard. Locate the + Brand Card button and click on the three vertical dots. Next, click on Import Brand Cards.
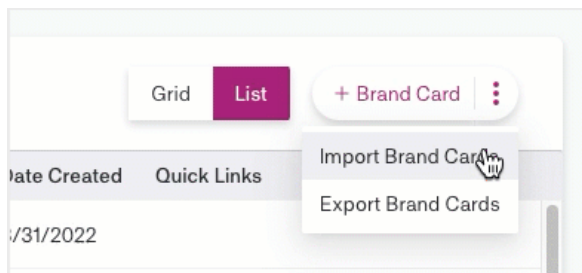
Now, download the sample .csv template. This is the sheet you'll use to populate brand information and then reimport the template back into BrandKeep creating a bunch of new brand cards all at once.
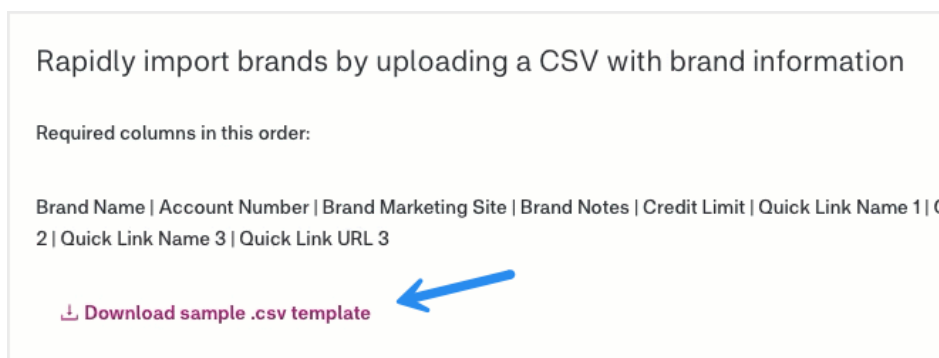
Important note: The names and sequence of the columns must remain as they are on the .csv template spreadsheet.
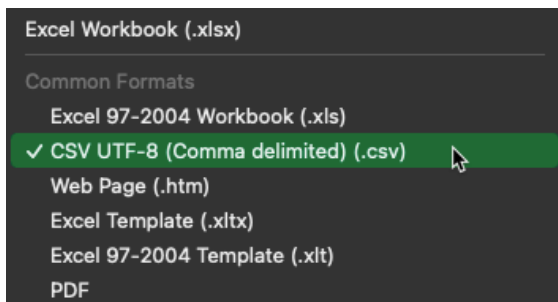
Fill in the information on the spreadsheet.
The only column that is required is the Brand Name column. All other columns can be left blank if you do not have that information. You can always add these details later.
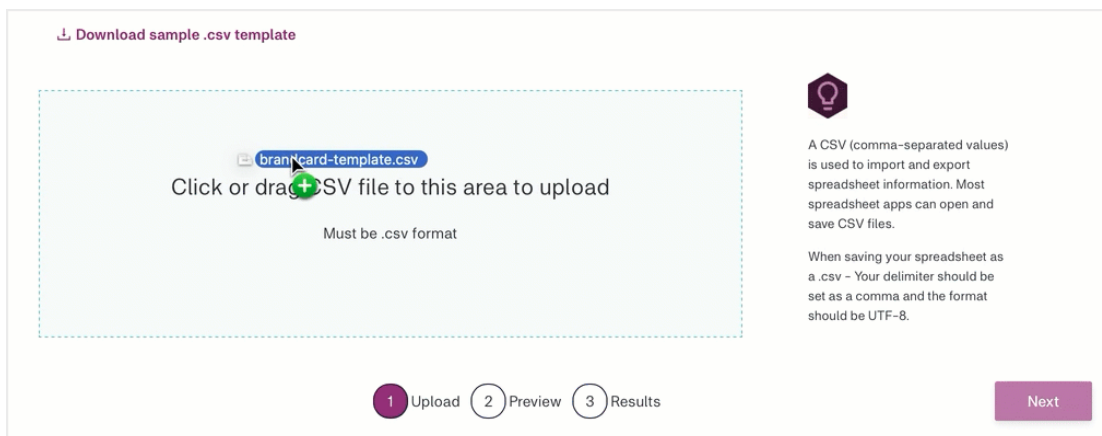
Quick links appear on your Brand Card for quick access to sites that you utilize frequently. Add whatever links you use the most (the brand's B2B is a great example). Note that if you add a URL to the .csv, you must add a quick link name and vice-versa.

	A	B	C	D	E	F	G	H	I	J
1	Brand Name	Account Number	Brand Marketing Site	Brand Notes	Credit Limit	Quick Link Name 1	Quick Link URL 1	Quick Link Name 2	Quick Link URL 2	Quick Lir
2	Schroeder Inc	6854PS			75,000	B2B	schroeder.b2.com			
3	Harvey and Sons	HAS0912	hasfootwear.com		40k	B2B	has.b2b.com	Invoice Payment	payme.com	
4	Dickens Ltd	D-01-403	dickens.com							
5	CGK	887-4588	cgk.com		100k					
6	Medhurst LLC	MM22-45111								
7	McLaughlin Outdoor	96845732		b2b login info UN: info@wearhouse.com PW: Passw0rd! Only Fall and Spring order deadlines!	100k	B2B	mclaughlinb2b.com			
8	Pacocha LLC	449912								
9	Hansons	103564								

Once the brand information has been added to the import sheet, we recommend you save the sheet as a CSV UTF-8. This will allow any special characters that may have been used to display on the site as expected.

Excel Workbook (.xlsx)

Common Formats
Excel 97-2004 Workbook (.xls)
✓ CSV UTF-8 (Comma delimited) (.csv)
Web Page (.htm)
Excel Template (.xltx)
Excel 97-2004 Template (.xlt)
PDF

Drag your .csv from your files into the grey box on the import page. Then click on Next to proceed to the preview page.

⤓ Download sample .csv template

brandcard-template.csv
Click or drag CSV file to this area to upload

Must be .csv format

A CSV (comma-separated values) is used to import and export spreadsheet information. Most spreadsheet apps can open and save CSV files.

When saving your spreadsheet as a .csv – Your delimiter should be set as a comma and the format should be UTF-8.

1 Upload 2 Preview 3 Results Next

On the preview page you will see a summary of how many new brands you are creating. Here you can verify that your data is displaying as expected.

If all the information looks correct, click on Import to proceed.

Import Brands ✕

Creating **2** new brands   Updating **0** existing brands

Updates to existing brands will replace imported data with current data. Any empty row data will be ignored and will not delete existing infromation

Brand Name	Account Number	Brand Marketing Site	Brand Notes
Hansons	103564	hansons.com	UN: steve@wearhouse PW: passw0rd!
Saturn Optics	WH-352	saturnoptics.com	

If your import doesn't look correct:
Required columns are missing or in wrong order, file isn't using a comma as the delimiter, file isn't in UTF-8 formatted.

Back   1 Upload 2 Preview 3 Results   **Import**

You'll receive a results page with information on how many rows were imported and how many new brands were created.

Import Brands ✕

Success   **2/2** rows imported   **2** new brands created successfully   **0** existing brands updated successfully

1 Upload 2 Preview 3 Results   **Ok**

Step 2: Add assets, and assign assets to a brand card

Now that brand cards have been created you can start adding all your stuff. In BrandKeep we use the term "assets" to collectively refer to all the spreadsheets, workbooks, order forms, invoices, product images and videos, policies, line lists, sell-in decks, and so on.

The easiest way to add a lot of assets to BrandKeep at one time is to drag and drop a bunch of files all at once from your file browser. If you already have your assets in a folder on your computer, then you'll have them into BrandKeep in a minute.

Adding a brand's assets into the assets tab in a brand card will assign those assets to the brand on upload. This is the method we'll use below to add assets.

Adding assets
To add assets to a brand card, first navigate to the Brands dashboard and click on the brand card you would like to add an asset to.

On the brand card pop, click the Brand Assets tab and then click on the + Asset button. Choose 'Add File' from the options.
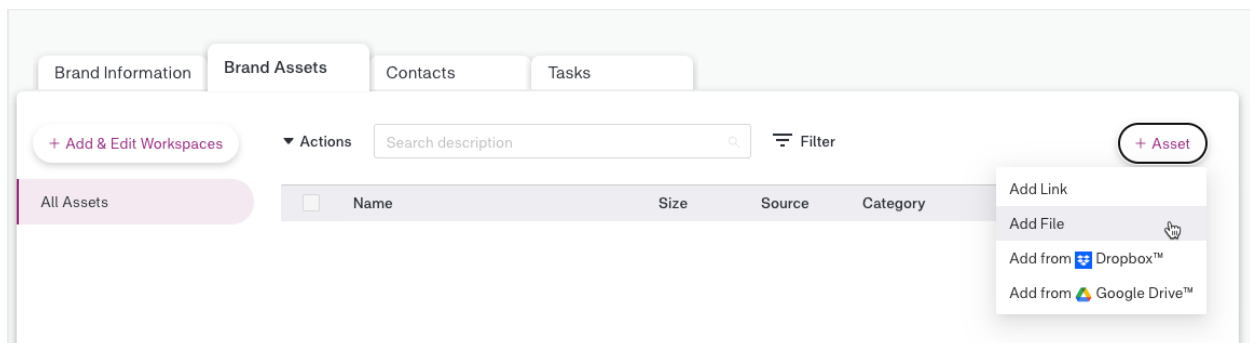
Next, drag your files into the Add Files window (or you can click into the Add Files window to open the file browser on your computer and add them that way).
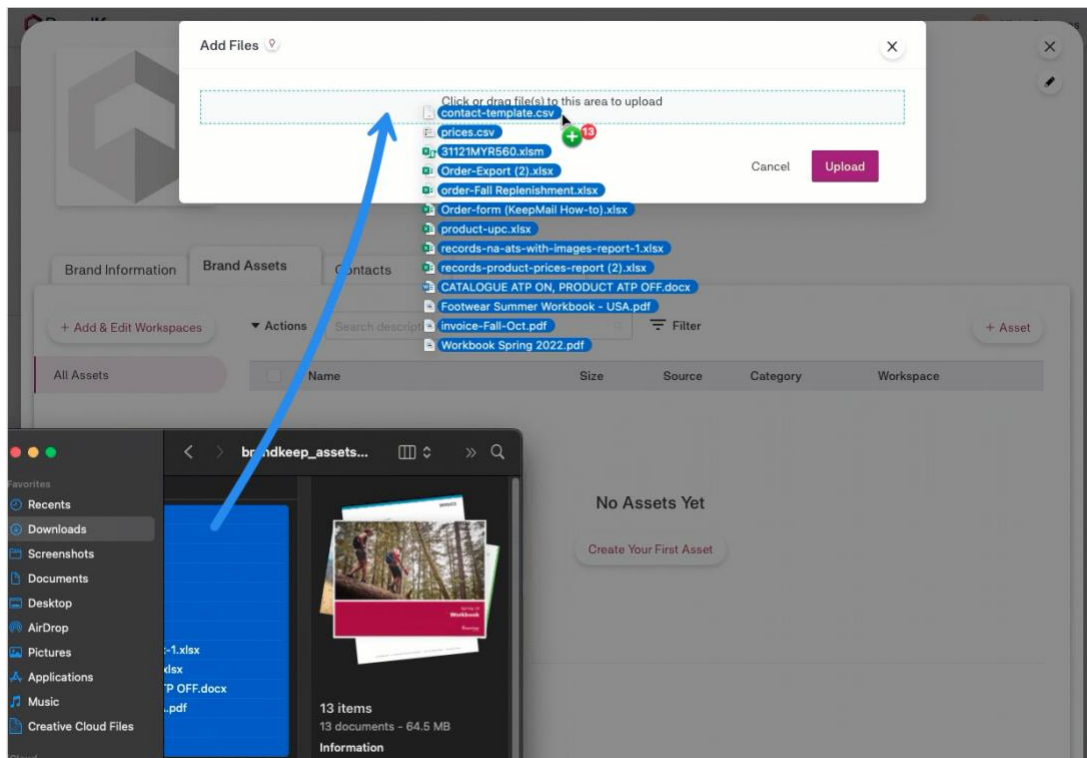
Then click on upload.
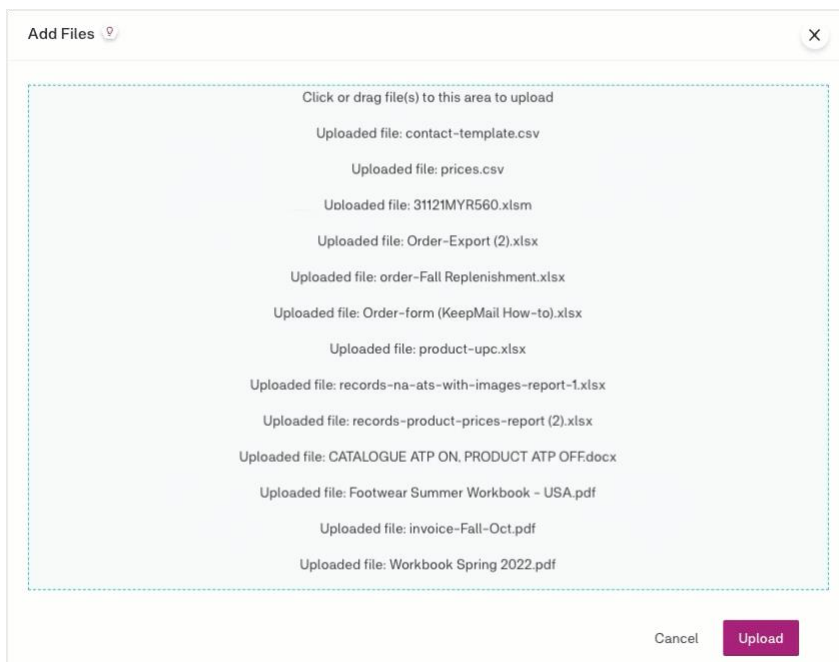
Step 3: Create categories and assign assets to them

Categories are used to organize and retrieve your assets across a brand card, as well as across all your brands in BrandKeep.

For example, you can assign a brand asset to a category called "Order Forms" and then use the filter to view all of that brand's order forms. But, since categories also work across all brand cards, you can filter all your assets by category and see every asset assigned the "Order Forms" category, regardless of what brand card the asset is associated with.

To assign a category to many assets at one time use the asset multi-select option. In the Brand Assets tab on your brand card, click the check box next to the assets that you would like to assign a category to. Click on the 'Actions' button, select 'Edit'.
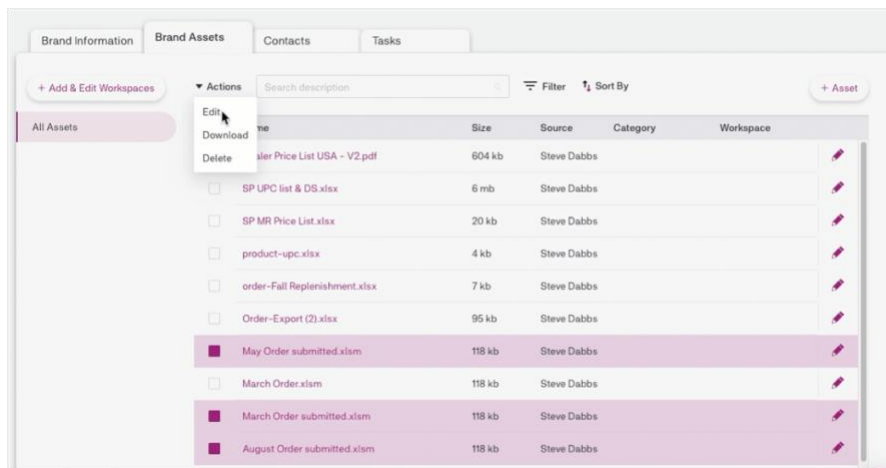
Type in a category name into the Category field. Click Save and that's it. You can also add multiple categories at one time if needed.
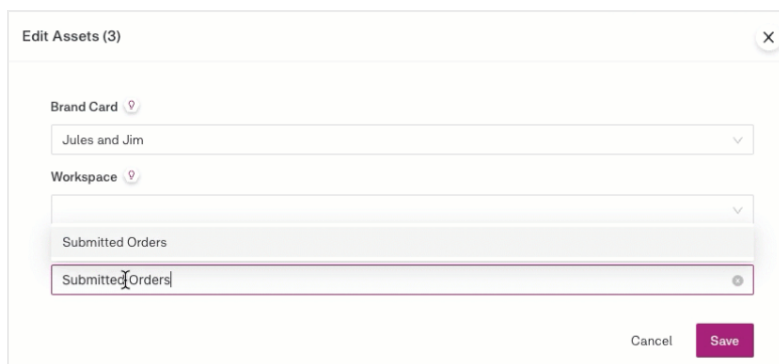
In the future, when you go to add categories to other assets, you'll see all the existing categories you've created displayed as a list to choose from.
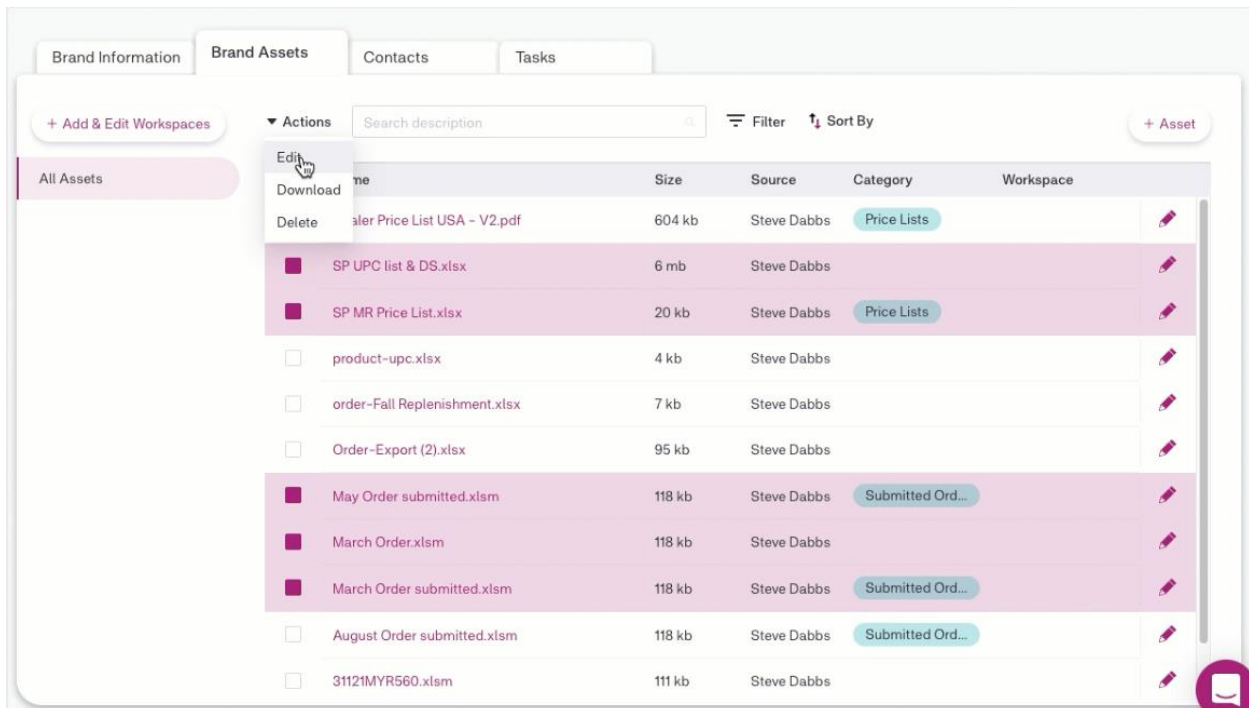
Step 4: Create workspaces and assign assets to them

Workspaces are a way to classify your brand assets that represent your team/store workflow. For example, naming your workspaces to align with your seasonal buying-selling cycles, e.g., "Spring 2024", is ideal when applying a filter to retrieve assets within that seasonal workspace.
And, if you use the same workspace name across all your brand cards, you can easily filter and view every asset within that one workspace, regardless of which brand your workspace was created for.

Creating and assigning a workspace to an asset works the same as categories.
To assign a workspace to many assets at one time use the asset multi-select option. In the Brand Assets tab on your brand card, choose which assets that you would like to assign the workspace to. Click on the 'Actions' button, select 'Edit'.

Type in the workspace name into the workspace field. Click Save and that's it.

In the future, when you go to add a workspace to other assets, you'll see all the existing workspaces you've created displayed as a list to choose from.
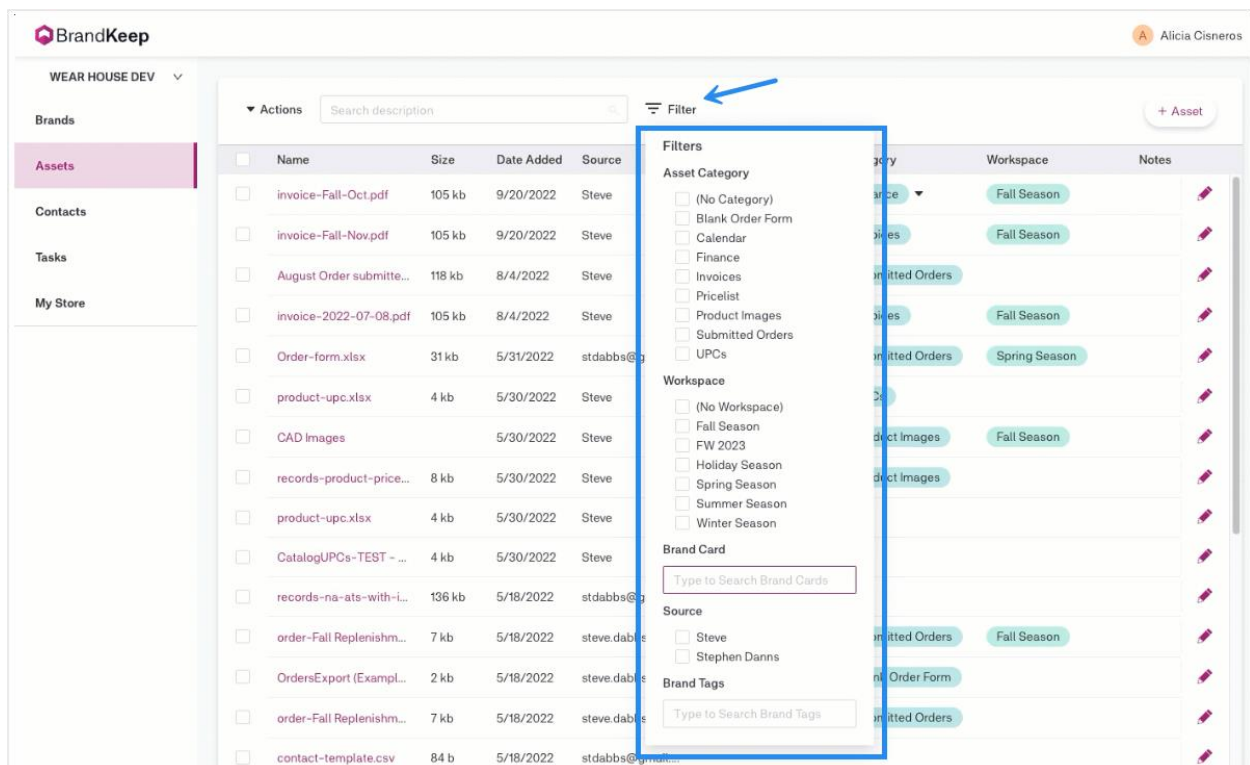
Now that you have your assets loaded and classified, let's move onto the last step and learn how to locate them.

Step 5: Using the filter to retrieve specific assets

Using filters allows you to retrieve just the assets you need, when you need it. This is a core part of working within BrandKeep. Understanding how filtering works is an important step when determining how to classify asset categories and workspaces - since these are two often used options to filter content within BrandKeep.
The easiest way to query all assets is to use the assets dashboard. *Side note: the assets dashboard contains every asset you've uploaded to BrandKeep, regardless of brand card.*

On the Assets dashboard, click on the Filters button to display a dropdown with different criteria to select. Then choose the criteria you would like to use to filter your assets.


Let's look at an example below.

As a retailer I sometimes need to review submitted orders from a previous season. For this example, I want to retrieve **all orders submitted in the spring for the brand Jules And Jim**.

For this query, I'll select the following criteria in the filter:
- "Submitted Orders" (Asset Category)
- "Spring Season" (Workspace)
- "Jules And Jim" (Brand card)

Which retrieves the following assets:
- March Order submitted.xlsx
- April Order submitted.xlsx
- May Order submitted.xlsx
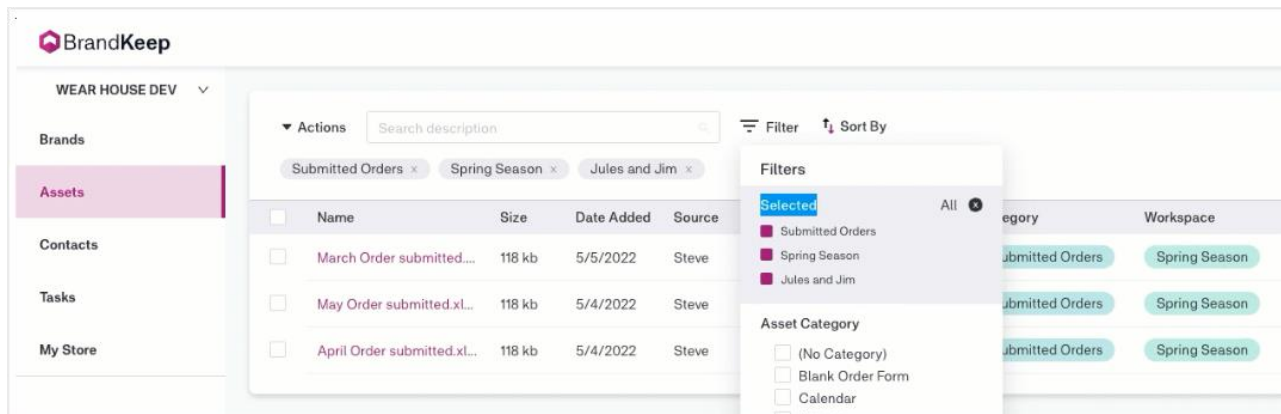
And that's it! You are on your way to getting all that stuff in and organized.