

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, <u>please click here</u>.

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 <u>knowledge base</u> 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.

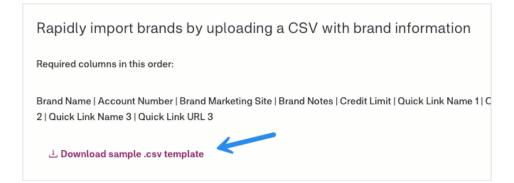
How to use the import sheet to create multiple brands

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.

	Grid	List	+ Brand Card
Pate Created Quick Links			Import Brand Car
/31/2022			Export 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.



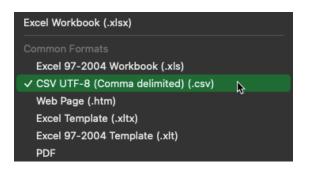
Fill in the information on the spreadsheet.

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	В	С	D	E	F	G	н	1 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 Lin
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								
			b2b login info UN: info@wearhouse.com PW: Passw0rd!						
7 McLaughlin Outdoor	96845732		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.



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

Click or drages SV 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.

Creating 2 new brands	Updating <mark>0</mark> existing brands	Updates to existing brands will replace imported dat Any empty row data will be ignored and will not dele	
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 co Required columns are missing		comma as the delimiter, file isn't in UTF-8 forma	atted.

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

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.

Brand Information Bran	nd Assets	Contacts	Tasks					
+ Add & Edit Workspaces	▼ Actions	Search description			- Filter			+ Asset
ll Assets	N	ame	S	Bize	Source	Category	Add Link	
							Add File	ŝ
							Add from 😝 Dre	opbox™
							Add from 🔼 Go	ogle Drive™



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).

	Add Files 🔮					×	×
6			lick or drag file(s) to this area ontact-template.csv ices.csv 1121MYR560.xlsm rder-Export (2).xlsx rder-Fall Repensitment.xlsx rder-form (KeepMail How-to)		Cancel Up	load	
Brand Information		Contacts Con	roduct-upc.xlsx cords-na-ats-with-images-re cords-product-prices-report ATALOGUE ATP ON, PRODUC potwear Summer Workbook - voice-Fall-Oct.pdf forkbook Spring 2022.pdf	(2).xlsx T ATP OFF.docx			+ Asset
All Assets	< > brindkeep	Name _assets (]]) \$	Size	Source	Category	Workspace	
avorites			17 C	lo Assets Yet			
Pictures Applications	Lxisx ix OFF.docx idf	13 items 13 documents - 64.5 MB Information					

Then click on upload.

Add Files 🔮		×
Click or drag file(s) to this area to upload		
Uploaded file: contact-template.csv		
Uploaded file: prices.csv		
Uploaded file: 31121MYR560.xlsm		
Uploaded file: Order-Export (2).xlsx		
Uploaded file: order-Fall Replenishment.xlsx		
Uploaded file: Order-form (KeepMail How-to).xlsx		
Uploaded file: product-upc.xlsx		
Uploaded file: records-na-ats-with-images-report-1.xlsx		
Uploaded file: records-product-prices-report (2).xlsx		
Uploaded file: CATALOGUE ATP ON, PRODUCT ATP OFF.docx		
Uploaded file: Footwear Summer Workbook - USA.pdf		
Uploaded file: invoice-Fall-Oct.pdf		
Uploaded file: Workbook Spring 2022.pdf		
	Cancel	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'.

Brand Information	Brand Assets	Contacts	Tasks					
+ Add & Edit Workspace	s • Action	s Search descr				Ву		+ Asset
All Assets	Edit	ad		Size	Source	Category	Workspace	
	Delete	aler Price List U	SA - V2.pdf	604 kb	Steve Dabbs			
		SP UPC list & DS.x	lsx	6 mb	Steve Dabbs			1
		SP MR Price List.xl	5X	20 kb	Steve Dabbs			1
		product-upc.xlsx		4 kb	Steve Dabbs			
		order-Fall Replenis	hment.xlsx	7 kb	Steve Dabbs			1
		Order-Export (2).x	lsx	95 kb	Steve Dabbs			1
		May Order submitt	ed.xism	118 kb	Steve Dabbs			1
		March Order xism		118 kb	Steve Dabbs			
		March Order subm	itted.xlsm	118 kb	Steve Dabbs			
		August Order subr	eitted sizes	118 kb	Steve Dabbs			

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.

Brand Card 9	
Jules and Jim	~
Workspace 9	
	~
Submitted Orders	
Submitted	0

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'.

Brand Information	Brand Assets	Contacts	Tasks				
+ Add & Edit Workspace	S Actions	Search description			, Filter †↓ So	rt By	+ Asset
ll Assets	Edit	ne		Size	Source	Category Workspace	
	Delete	aler Price List USA –	V2.pdf	604 kb	Steve Dabbs	Price Lists	
		SP UPC list & DS.xlsx		6 mb	Steve Dabbs		
		SP MR Price List.xlsx		20 kb	Steve Dabbs	Price Lists	
		product-upc.xlsx		4 kb	Steve Dabbs		
		order-Fall Replenishme	ent.xlsx	7 kb	Steve Dabbs		
		Order-Export (2).xlsx		95 kb	Steve Dabbs		
		May Order submitted.x	lsm	118 kb	Steve Dabbs	Submitted Ord	
		March Order.xlsm		118 kb	Steve Dabbs		1
		March Order submitted	.xlsm	118 kb	Steve Dabbs	Submitted Ord	
		August Order submitte	d.xlsm	118 kb	Steve Dabbs	Submitted Ord	
		31121MYR560.xlsm		111 kb	Steve Dabbs		



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

lit Assets (5)	
Brand Card ♀ + Add new Spring Seaso	
Spring Seaso	0
Category 📀	
Asset Category	

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.

WEAR HOUSE DEV 🗸 🗸									
Brands	• /	Actions Search description				∓ Filter	-		+ Asset
Assets		Name	Size	Date Added	Source	Filters Asset Category	золу	Workspace	Notes
Contacts		invoice-Fall-Oct.pdf	105 kb	9/20/2022	Steve	(No Category)	arce 🔻	Fall Season	
Jonacio		invoice-Fall-Nov.pdf	105 kb	9/20/2022	Steve	Blank Order Form Calendar	oi es	Fall Season	
fasks		August Order submitte	118 kb	8/4/2022	Steve	Finance Invoices	an itted Orders		1
lly Store		invoice-2022-07-08.pdf	105 kb	8/4/2022	Steve	Pricelist Product Images	ji es	Fall Season	1
		Order-form.xlsx	31 kb	5/31/2022	stdabbs@	g Submitted Orders	an itted Orders	Spring Season	
		product-upc.xlsx	4 kb	5/30/2022	Steve	Workspace (No Workspace)	De D		
		CAD Images		5/30/2022	Steve	Fall Season FW 2023	di ct Images	Fall Season	
		records-product-price	8 kb	5/30/2022	Steve	Holiday Season Spring Season	duct Images		
		product-upc.xlsx	4 kb	5/30/2022	Steve	Summer Season Winter Season			
		CatalogUPCs-TEST	4 kb	5/30/2022	Steve	Brand Card	-		
		records-na-ats-with-i	136 kb	5/18/2022	stdabbs@	Type to Search Brand Cards Source			
		order-Fall Replenishm	7 kb	5/18/2022	steve.dab	and the second se	m itted Orders	Fall Season	
		OrdersExport (Exampl	2 kb	5/18/2022	steve.dab	8 Brand Tags	nl Order Form		
		order-Fall Replenishm	7 kb	5/18/2022	steve.dab	s Type to Search Brand Tags	m itted Orders		
		contact-template.csv	84 b	5/18/2022	stdabbs@		_		

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

BrandKeep									
WEAR HOUSE DEV 🛛 🗸									
Brands	▼ A	Search description			〒 Filter t↓ Sort By				
	Submitted Orders × Spring Season × Jules and Jim ×					Filters			
Assets		Name	Size	Date Added	Source	Selected	All 🔇	egory	Workspace
Contacts		March Order submitted	118 kb	5/5/2022	Steve	Submitted Orders		ubmitted Orders	Spring Seasor
Tasks		May Order submitted.xl	118 kb	5/4/2022	Steve	Jules and Jim		ubmitted Orders	Spring Season
My Store		April Order submitted.xt	118 kb	5/4/2022	Steve	Asset Category (No Category) Blank Order Form Calendar		ubmitted Orders	Spring Season

And that's it! You are on your way to getting all that stuff in and organized.