# RAYMOND JAMES MARKETPLACE USER GUIDE

Creating Stationery in Marketplace



# **OVERVIEW**

# Marketplace

<u>Marketplace</u> is the online print ordering system where you can personalize corporate stationery items such as business cards, letterhead, envelopes and notepads. It also contains a selection of marketing materials such as newsletters, brochures, and greeting cards that can be personalized.

# MyProfile

MyProfile is the firm's information and personalized brand repository. The information in MyProfile feeds into other systems that leverage your personal information, such as Marketplace. Therefore, the first step to ordering stationery in Marketplace, is ensuring that your information in MyProfile is accurate and complete.

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# **MYPROFILE**

If your MyProfile information is already accurate and complete, please skip to the <u>Marketplace</u> instructions in this document.

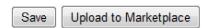
Each associate needs to fill out their own compliance-approved information in <u>MyProfile</u>. If you order stationery items on behalf of another associate and need access to his or her <u>MyProfile</u> information, please email <u>rjmarket-place@webbmason.com</u> with both you and your associate's username. Access to the profile requested will be granted within a 24-hour period.

You can access MyProfile through Advisor Access (Advisor Access > Support > Corporate Services > MyProfile).

On the left hand side (see image below) you will see the sections of MyProfile that need to be filled out for stationery requests.



Once everything is filled in, Click the 'Save' and 'Upload to Marketplace' button in the bottom right corner.



#### Name

Preferred full name: Enter your name as you would like it to appear on stationery items.

Title: You can enter up to two titles in the boxes provided.

Signature: This will not appear on stationery items. If you order other marketing materials that require a signature, complete a <u>Marketing Signature Request Form</u>. A signature file will be created and returned to you for uploading and general use.

Once everything is filled in, Click the 'Save' and 'Upload to Marketplace' button in the bottom right corner.

#### Address

#### Address:

Confirm that both your street address and mailing address have populated.

If your address is not appearing or if it is incorrect, contact the appropriate party listed below, and inform them that your address needs to be updated or added so that you can complete an order for stationery.

RJA // Email: <u>HRDataManagement@RaymondJames.com</u> RJFS // Email: RJFSRegistrations@RaymondJames.com

#### E-mail Address:

Confirm that the correct email address is entered here.

#### Web Address:

If you have a compliance-approved website address, enter it here.

Please ensure that your web address does not begin with 'http://www.' The 'http://www.' is not required when visiting a website and therefore is not included in the Raymond James brand guidelines.

If for some reason your web address does not save, send a request to <u>Marketing Web Services</u> with the correct information – they can add it to the system for you. Once your request is completed by Web Services, go back to this page in My-Profile and click 'Save' and 'Upload to Marketplace'.

Once everything is filled in, Click the 'Save' and 'Upload to Marketplace' button in the bottom right corner.

#### Phone

#### Phone Numbers:

If you do not see your phone number(s) here don't worry because you can edit your phone numbers in Marketplace when placing an order.

If you want these numbers updated, send a request to the appropriate contact below. Please inform them that you would like your phone numbers updated in MyProfile.

RJA // Email: <u>HRDataManagement@RaymondJames.com</u> RJFS // Email: <u>RJFSRegistrations@RaymondJames.com</u>

# **MYPROFILE**

Once everything is filled in, Click the 'Save' and 'Upload to Marketplace' button in the bottom right corner.

# Branding

#### Company Branding/Department or Group Name:

Enter your Group, DBA or Department name here. If you use the Raymond James logo this will appear as an additional title line on business cards, but will appear above the address line on letterhead and notepads.

#### Byline/ Marketing Tagline:

Enter your compliance-approved byline or marketing tagline here.

#### Logo (for those with custom group logos):

If you have a Group or DBA custom logo and want to use it on stationery items, please <u>e-mail</u> the logo to Marketing. Marketing will upload the appropriate file formats to MyProfile.

#### Photo:

Photos do not appear on stationery items, but can appear on other Marketing collateral if interested. If you have a photo you would like added, please <u>e-mail</u> the photo to Marketing.

Once everything is filled in, Click the 'Save' and 'Upload to Marketplace' button in the bottom right corner.

# Designations

You can enter up to three approved designations in this area.

These will display near your preferred full name on stationery items. If your designation is not listed in the dropdown, please callTSC (ext. 7-HELP)

Once everything is filled in, Click the 'Save' and 'Upload to Marketplace' button in the bottom right corner.

Once your MyProfile is complete, you are now ready to place your order on <u>Marketplace</u>.

#### STEP ONE

When you first enter Marketplace, you will see a carousel showing items currently available on Marketplace and the divisions you have access to order for at the bottom. Choose either the division stationery catalog or the 'Shop' tab at the top of the page to get started.



#### STEP TWO

#### **Business Cards**

Select the stationery that pertains to your division. For instance; RJFS associates will select, 'ICD/RJFS Stationery'.

Click on the stationery item you are ordering (business cards, letterheads, note-pads, envelopes, etc.). Select whether you have a Group Logo or a RJ Logo.

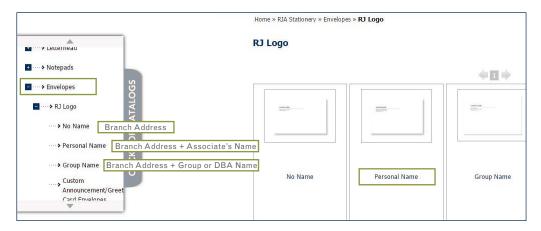
If ordering business cards make sure to select whether it's flat print or raised print. Raised print is literally raised and can be felt by the touch of



your hand across the business card. If you have a custom logo and would like raised print cards, this system will NOT raise the logo portion of the card. It will ONLY raise the text portion of the business card. If you want your custom logo raised, you will need to order your cards custom through the Marketing Account Services team by submitting a <u>Marketing Job Request Form</u>.

#### **Envelopes**

Select your Division's Stationery catalog. Select envelope type. Select RJ Logo or Group Logo. Select whether you want only the address, the address and the associates name or the address and the group name.



#### STEP THREE

Click the item you would like to order. The small proof has now been slightly enlarged, but this is still an example of the item – this is not your customized item.

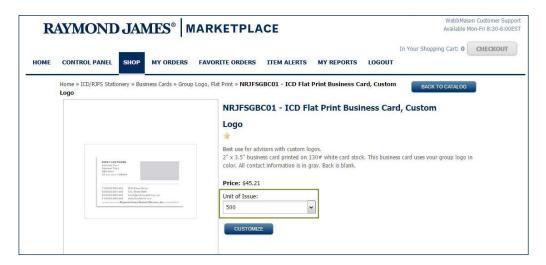


#### STEP FOUR

Select the quantity you would like from the 'Unit of Issue' drop down. If you do not see the unit of issue you would like, select the highest quantity offered.

After you submit your order, you can increase the quantity by contacting the vendor Webb Mason at <a href="mailto:rjmarketplace@webbmason.com">rjmarketplace@webbmason.com</a> or call them at 727-531-1112 x1704.

Make sure you include the confirmation number you are provided after the order is placed, this is a nine digit number that generally starts with, '15-J0...'.



#### STEP FIVE

Click 'Customize'. This will bring you to the next page to create and proof your item.



#### STEP SIX

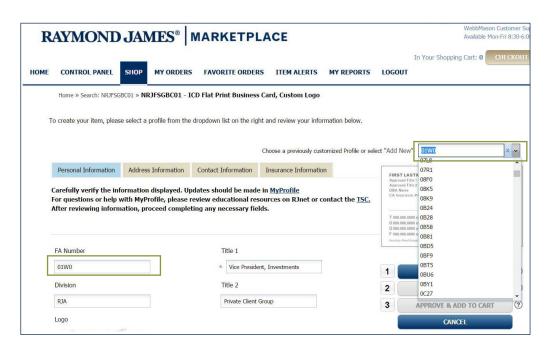
You are now at the page where you begin to create the item.

At the top of the screen you will see the following text: 'To create your item, please select a profile from the dropdown list on the right and review your information below.' Click on the drop down menu above the proof on the right side of the screen: 'Choose a Previously Customized Profile or select "Add New". Select either the ID number or FA number of the person for whom you are placing the order.

If you do not see the person for whom you are ordering in the drop down, **DO NOT** click 'Add New' or 'Add New from Current'. You'll need to request access to order for that associate from our vendor WebbMason. Email WebbMason at <a href="mailto:rjmarketplace@webbmason.com">rjmarketplace@webbmason.com</a>. Let them know that you are requesting 'Marketplace Access' to order stationery.

Provide them with the username you use to log into the Raymond James network (*usually first initial and last name*) and the user name of the associate(s) for whom you are trying to order (*usually first initial and last name*).

Once the request is submitted, someone from WebbMason will reach out to you when that access is granted, typically within 24 hours.



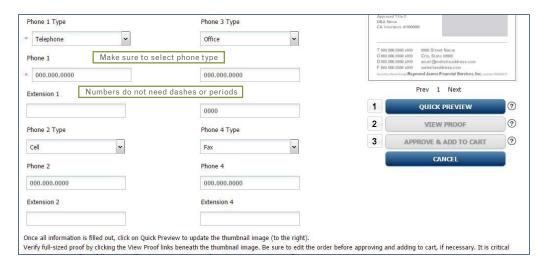
### STEP SEVEN

Once you select the number from the drop down, make sure the individual's information auto-fills into the contact information areas.

If information fills in properly, see STEP NINE.

If information does not fill in, see STEP EIGHT.

If phone numbers are incorrect, you can edit them directly in Marketplace.



#### STEP EIGHT

If the information does not fill in:

First make sure that associate has selected 'Upload to Marketplace' at the bottom of their MyProfile. You can do this yourself (*if you have access to the associate in MyProfile*) by opening a separate internet browser window; otherwise you will need to exit Marketplace. Alternately, you can simply ask the associate to log into MyProfile and click the 'Upload to Marketplace' button for you.

After MyProfile is checked, return to Marketplace and then select 'Add New' from the drop down. **Do not create a new profile,** this button is only to be used to refresh the page.

Once you select 'Add New', go back to the drop down in Marketplace and select the number for the associate you are ordering for. You should see that the contact information now populates on the screen.

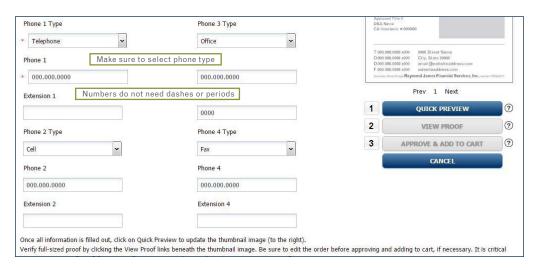
Still having trouble? Call 727-531-1112 x1704.

#### STEP NINE

Review the populated information and confirm that it is correct.

You can have up to four telephone numbers. The phone numbers do not require dashes or periods (*this is automatically added when a proof is created*). Make sure each telephone is labeled whether it's an office, telephone, fax, etc.

If information is missing, make sure the associate's <u>MyProfile</u> is updated. Please see the steps in the MyProfile section in the beginning of this document.

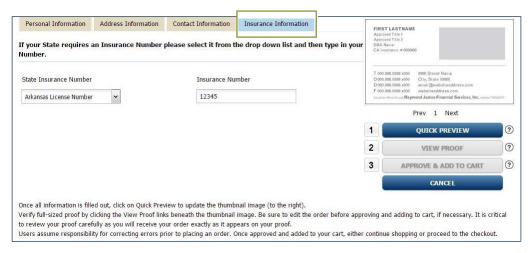


#### STEP TEN

Does your state require an insurance license number?

NO: Continue to **STEP ELEVEN**.

YES: Click on the tab labeled 'Insurance Information' in Marketplace. Here you will select your state, then enter the insurance license number.



#### STEP ELEVEN

When all of the information is correct and formatted how you would like it to print, click on the 'Quick Preview' button underneath the proof on the right-hand side of the screen. This will generate a very small proof.

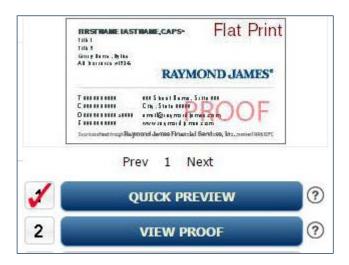


#### STEP TWELVE

Before you can continue, you must view your proof by clicking 'View Proof' on the right hand side, underneath 'Quick Preview'.

Your proof will pop up in another window. Carefully review your proof as it will print exactly as you see it.

If the proof is correct, click 'Approve & Add to Cart'. Your approval indicates that you intend for the order to be printed as seen in the proof. Users assume repsonsibility for correcting errors prior to placing an order.



#### STEP THIRTEEN

#### Adding the item to your cart:

Click the 'Approve & Add to Cart' button.

Once you add an item to the cart, it will stay in your cart until you place the order or remove it. You can always go back into your cart and edit an item after you have added it to your cart.

To edit an item *before* you place it in the cart, see STEP FOURTEEN.

To edit an item *after* it was placed in the cart, see **STEP FIFTEEN**.

To order additional items, repeat the same steps starting at **STEP TWO**.

If you are ready to place your order continue to <u>STEP SIXTEEN</u>.

#### STEP FOURTEEN

# To edit an item *before* you place it in the cart:

Once the information has been updated, click 'Quick Preview' and then 'View Proof'. Once your proof has rendered this will update the information that appears on your proof.

You can edit the phone numbers directly within Marketplace.

Any other information needs to be edited in your MyProfile, see <u>STEP SIX</u>.

#### STEP FIFTEEN

#### To edit an item *after* it was placed in the cart:

Click on 'Checkout', then find the item you need to edit.

Click on 'Edit' all the way to the right just beneath 'Actions'.

Edit the item, see STEP ELEVEN.

	BACK ORDER	ORDER QTY	UNIT OF ISSUE	PIECES ORDERED	UNIT PRICE	PRICE	ACTIONS
Firstname ush Options:    Add	No	1	500 ▼	500	\$45.21	\$45.21	Edit   Remove Save For Later
ush Options:	No	1	500 ▼	500	\$33.76	\$33.76	Edit   Remove Save For Later

#### STEP SIXTEEN

When you are ready to place your order:

Go to the top right hand corner of Marketplace and click 'Checkout'.



#### STEP SEVENTEEN

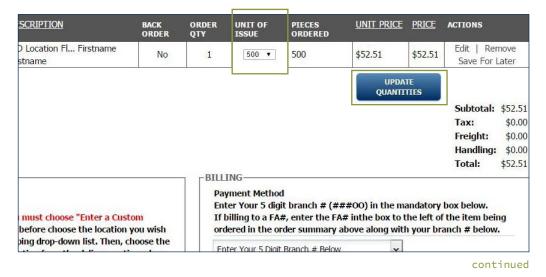
Review and confirm that your desired quantities are correct. If you need to update the quantity of an item, select the drop down for the 'Unit of Issue', and select the quantity you want to order. Select the 'Update Quantities' button towards the bottom.

If you need a larger quantity, select the highest quantity offered and after you place the order, forward your order confirmation email to rimarketpace@webbmason.com.

In the subject line type: 'Update Quantity - Job Number:'. The job number is the number that starts with (15-J0...).

If you need to RUSH or EXPEDITE an item, see <u>STEP NINETEEN</u>.

If you're not ready to place an order for all of these items, you can save items for later, see STEP EIGHTEEN.



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#### STEP EIGHTEEN

If you're not ready to order all of these items, you can save items for later. To the right, under the 'Edit' and 'Remove' button, click 'Save for Later' When you are ready to order that item, click on the link to your saved shopping cart and choose 'Move to Cart' on the items you wish to order. You can then continue with the checkout process, see STEP TWENTY.

If you need to remove an item from your order, you can do so before placing the order however; you must make sure you no longer want to order that item, as it will be permanently deleted. Click the 'Remove' button. To permanently deleted this item and can continue with placing the order. If you accidently remove an item, you will need to create it again.

3	BACK ORDER	ORDER QTY	UNIT OF ISSUE	PIECES ORDERED	UNIT PRICE	PRICE	ACTIONS
Firstname ush Options:  Add	No	1	500 ▼	500	\$45.21	\$45.21	Edit   Remove Save For Later
Firstname ush Options:  Add	No	1	500 ▼	500	\$33.76	\$33.76	Edit   Remove Save For Later

#### STEP NINETEEN

#### Print Timelines and Rush Fees:

Depending on your affiliation, Compliance may need to review your order. HOA and RJA orders go directly to processing, then to print. ICD/RJFS and FID orders go to compliance first for approval. Compliance takes 1-2 business days to approve the items. Once the items are approved, they are submitted for processing, then to print.

#### Order Processing and PrintTimelines:

When an order is placed *before* 11am, it will be processed on the same day. The following day is considered the first day in the printing timeline. *Example: Order is placed Monday before 11am, the order is processed that day and day one of printing starts Tuesday morning.* 

If an order is placed *after* 11am, the order will be processed the following day. Day one of the printing timeline will be the day *after* the order is processed. *Example: Order is placed Monday at 12pm, the order is processed Tuesday then day 1 of printing starts on Wednesday morning*. Any order that is sent for approval is not considered formally processed until the time of compliance approval. Production timeline will be based on the time and date of compliance approval, not the time and date of order.

#### Flat Business Cards:

Raymond James logo only 3 day print timeline, plus shipping time \$20 rush fee speeds printing to two days

#### Group Name or DBA Name logo (full color):

5 days print timeline, plus shipping time \$20 rush fee speeds printing to three days

#### All other items (letterheads, envelopes, memo pads, newsletters, etc.):

5 days print timeline, plus shipping time \$20 rush fee speeds printing to three days

#### Rush Fees:

All rush fees are per item. These are in addition to shipping fees.

#### Additional Rush Fees:

If the \$20 rush fee isn't fast enough, you can inquire about other additional expedite fees. Please call 727-531-1112 x1704 or email rjmarketplace@ webbmason.com and you will be directed to the appropriate person to help expedite your order. To calculate how many days it will take for your order to deliver via UPS Ground, please consult the map below. For exact shipping timelines, please email rjmarketplace@webbmason.com.



#### STEP TWENTY

From the Shipping Destination drop down on the left, select a new custom location or an existing saved location.

**NEW:** Enter all of the shipping information and click 'Save as default'. Proceed to STEP TWENTY-ONE.

SAVED LOCATION: Proceed to STEP TWENTY-ONE.



#### STEP TWENTY-ONE

Beneath the ship-to address, you will see the 'Delivery Options' section.

Select which delivery option you prefer: UPS Ground, UPS 2nd Day Air, UPS Overnight, or UPS Next Day Air 8:30am.

Everything ships on Raymond James UPS account number, which is a discounted rate. Shipping will be charged separately by your home office.

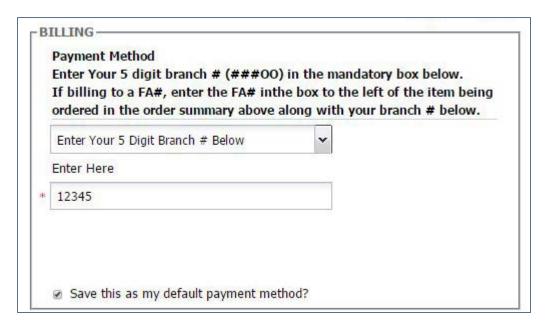


#### STEP TWENTY-TWO

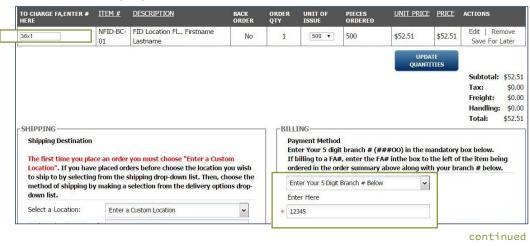
#### Billing:

Here you will choose whether you want to bill your Branch or FA#.

Choose the 'Enter Your 5 Digit Branch # Below' in the dropdown. In the field below labeled: 'Enter Here' with the red asterick to the right, enter your 3 or 5 digit branch number. If only 3 digits, please add two zeros after (example: ABC00).



If charging an FA#, fill out both the branch information as indicated above and type in the FA# number on the line item under the header 'To Charge FA, Enter # Here'. Both the information for the branch and FA must be entered if charging an FA.



Once your bill-to information is selected and your branch number is entered, select the 'Add Selected Billing Method' button. You can now move to the final step to complete your order.

#### STEP TWENTY-THREE

# Placing your order:

Confirm all of the information is correct. Once you confirm, click 'Place This Order Now'. You have successfully placed your order!

You will receive an order confirmation with the job number. If you have any questions about your order please contact the vendor WebbMason at 727-531-1112 x1704. For order timeline see <u>STEP NINETEEN</u>.

