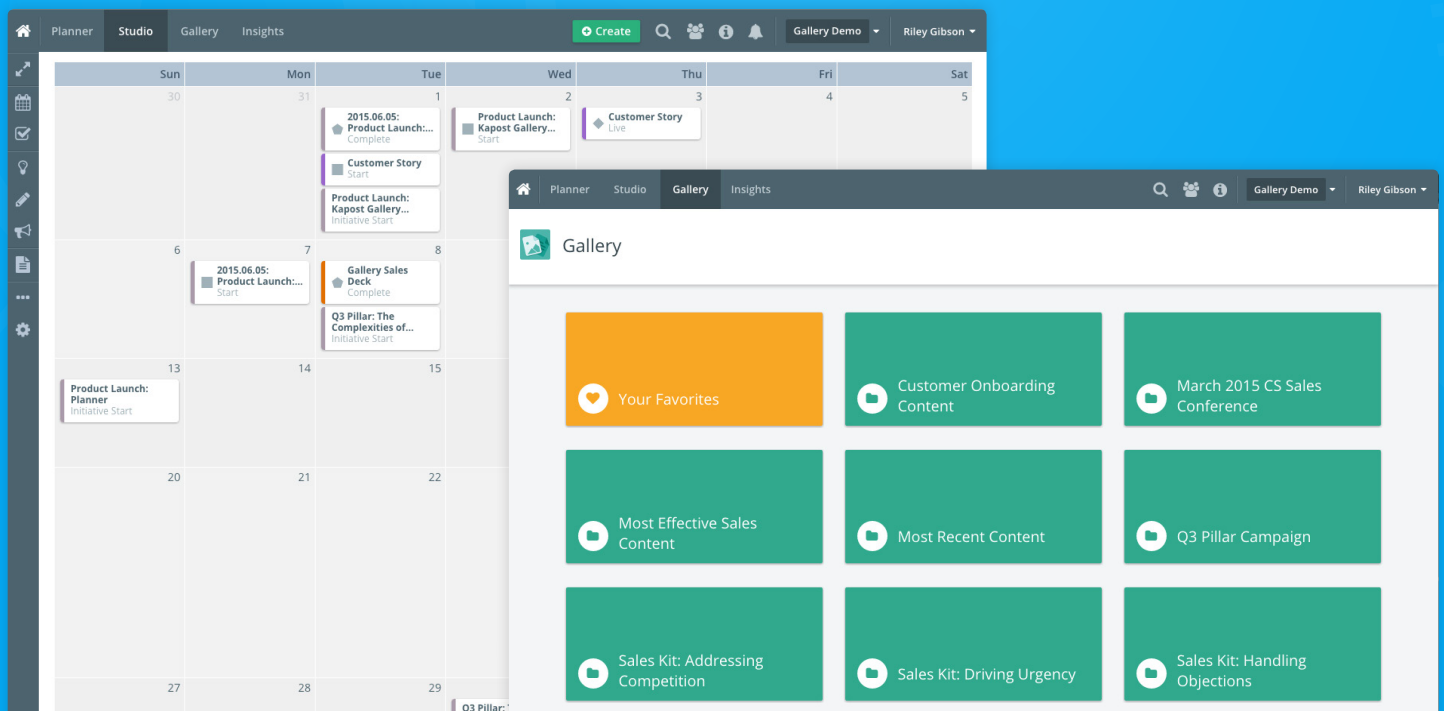


Welcome to Kapost

New User Getting Started Guide



The image displays two overlapping screenshots of the Kapost software interface. The background screenshot shows a calendar view with a dark header bar containing navigation tabs (Planner, Studio, Gallery, Insights), a 'Create' button, search, and user profile options. The calendar grid shows dates from Sunday 30 to Saturday 5, with various content items represented as colored blocks with status indicators (Complete, Start, Live).

The foreground screenshot shows the 'Gallery' view, which has a white header with the same navigation tabs and user profile. The main content area is a grid of content cards, each with a play button icon and a title:

- Your Favorites (orange card)
- Customer Onboarding Content (green card)
- March 2015 CS Sales Conference (green card)
- Most Effective Sales Content (green card)
- Most Recent Content (green card)
- Q3 Pillar Campaign (green card)
- Sales Kit: Addressing Competition (green card)
- Sales Kit: Driving Urgency (green card)
- Sales Kit: Handling Objections (green card)

Welcome to Kapost!

Welcome and thank you for becoming the newest Kapost rock star!

This guide will help you get started quickly with the Kapost Studio. You will find tools to help you fully leverage the software so you can create and collaborate on impactful content, keeping prospects and customers engaged with your brand. Efficiently planning, creating, and amplifying your content will help you meet your goals as a marketer.

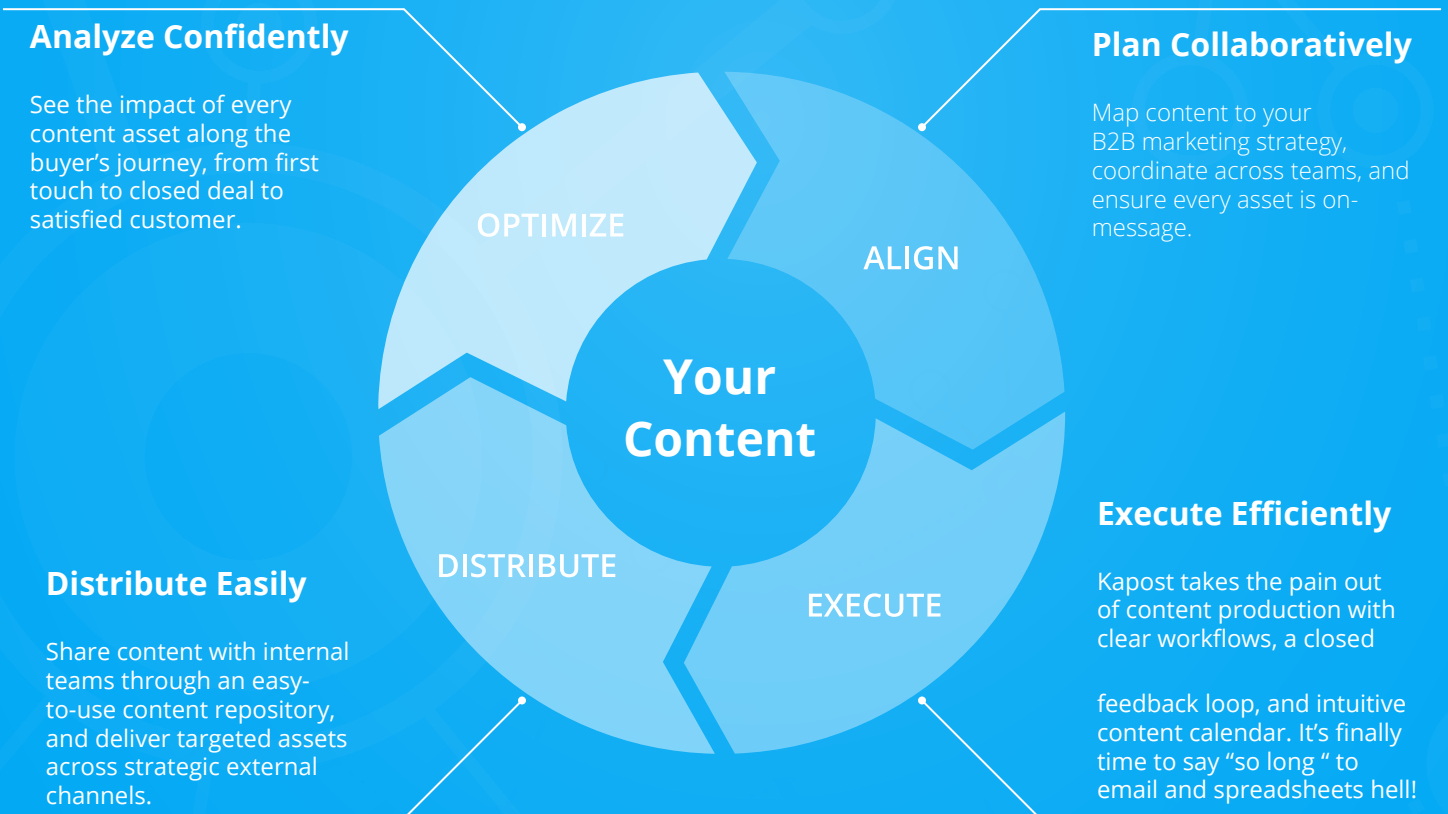
So What's Kapost?

Kapost is the B2B marketing content platform that helps you and your teammates to plan campaigns and create more content smarter.

From blog posts to product sheets to case studies, Kapost gives each piece of content a "home" to collaborate with your teammates, and workflows so everybody can see who's next to help move this project along.

What's in it for me?

By incorporating Kapost into your daily workflow, you will be able to quickly stay on top of your most important tasks and deliver content that matters most to you, your team, and your customers. It's about working smarter, not harder.



Steps Toward Success

1. Accept Kapost's Invite

Your organization has its own custom URL, which we call an "instance." You should have received an email invitation to this instance. Open that email and click the "Join Now" link to create a unique password and login for the first time. We suggest you bookmark your instance so you never lose it.

If you did not receive an email with this invitation, please email implementation@kapost.com.

2. Setup Your Profile

In the top right corner of your Kapost instance, click your name to access your profile screen. Add your full name, headshot, company, and job title so your team members can easily recognize you.

3. Customize Your Views

Whether you want to view content assigned to you or content your team is responsible for, creating a customized task view is the best way to go and it's super easy to set up. These views can be used to display the status of content you are responsible for, to manage workload, or to keep tabs on tasks.

Click Content in the navigation bar. In your content list choose the funnel icon on the top righthand side to start customizing your views. Choose to filter by any custom field, content type, or task that you need to. Save your views under the views drop down list at the top of the content catalog.

4. Read the Reference Guide Below

This guide will help you understand the critical function and areas in Kapost that you should become familiar with.

5. Sign Up for a Getting Started Webinar

Our Getting Started with Kapost webinar outlines how to use Kapost on a daily basis whether you are a content creator, manager, or you just contribute to content as a reviewer or writer. Run by our Education Lead this is the best way to interact with the Kapost education team, understand best practices, and get your questions answered right away. You can sign-up here: kapost.com/events.

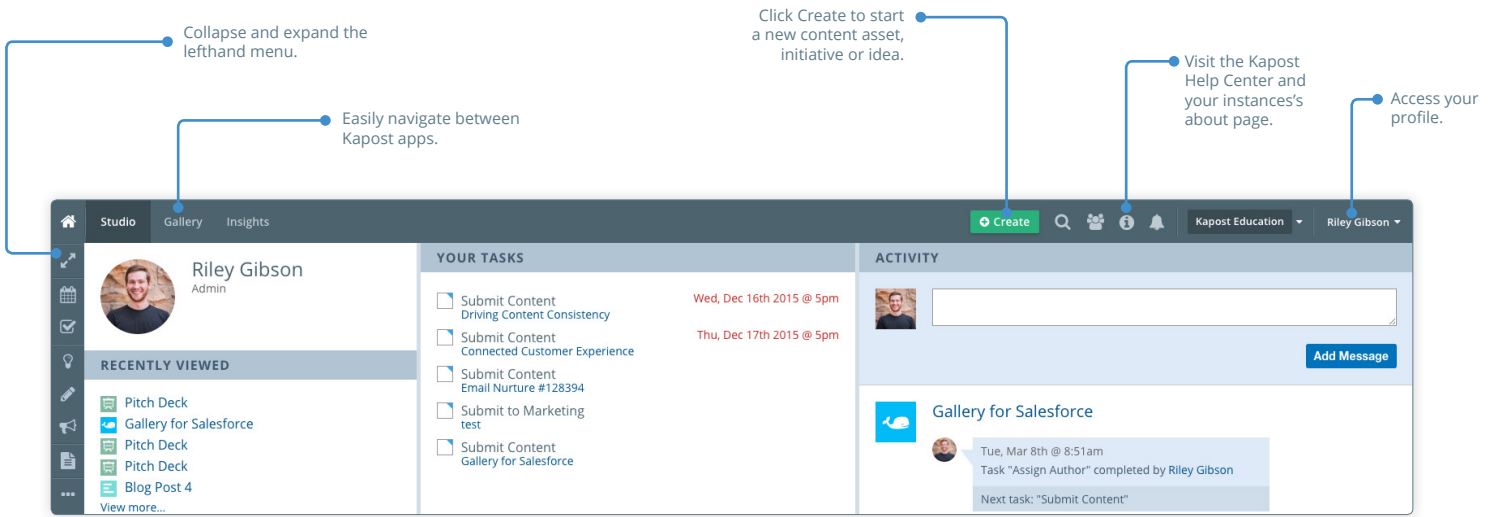
Kaposter Best Practice! Create a saved task view for content you manage:

In the filter options, click Tasks, then in the dropdown choose Filter by All My Tasks. Choose which data points you'd like to see as columns under the column tab selector [insert image] such as next task deadline to see when your task is due.

At the top where it says 'Content' click the dropdown list, type in "[Your Name] Tasks" then choose update.

Then you can find your new saved view in the list easily every time you access Kapost.

Navigating Kapost

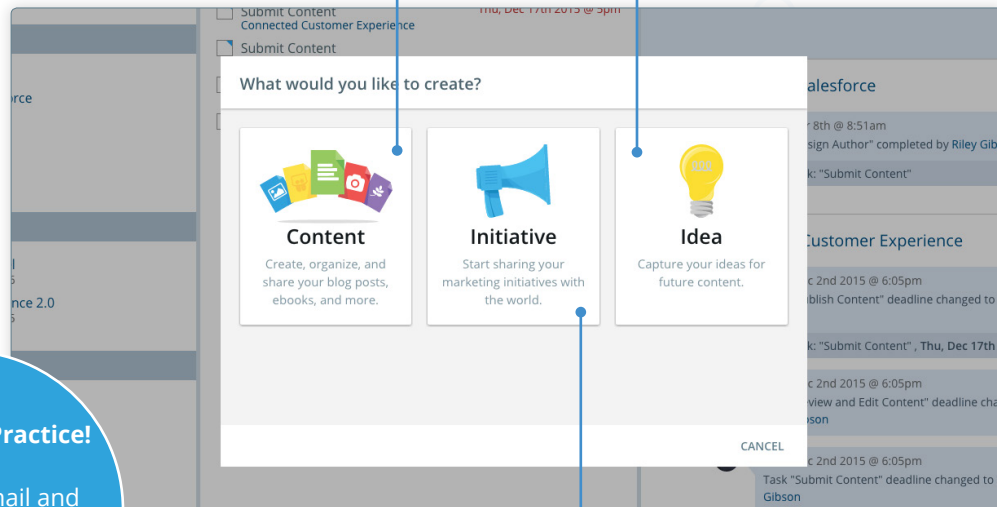


Creating in Kapost

To create a new content assets, initiative or idea in Kapost, simply click the green "Create" button in the top right of your screen.

Enter a name for the content asset and select the content type. If the content asset belongs to an initiative, select the initiative from the Add to Initiative search bar. Note, you can choose more than one initiative for this content to live in.

You have brilliant marketing ideas that can drive your marketing forward, but how do you share these ideas with your team? The Idea section is the best place to collect ideas for review, approval, or ask further questions.



Kapost Best Practice!
Get out of email and encourage your team to use the Idea submission option to send in ideas.

Once your initiative is created, you can add content assets individually or use an Initiative template to pre-populate a series of assets. Initiative templates allow you to upload many content assets simultaneously and make repeating standard initiatives faster.

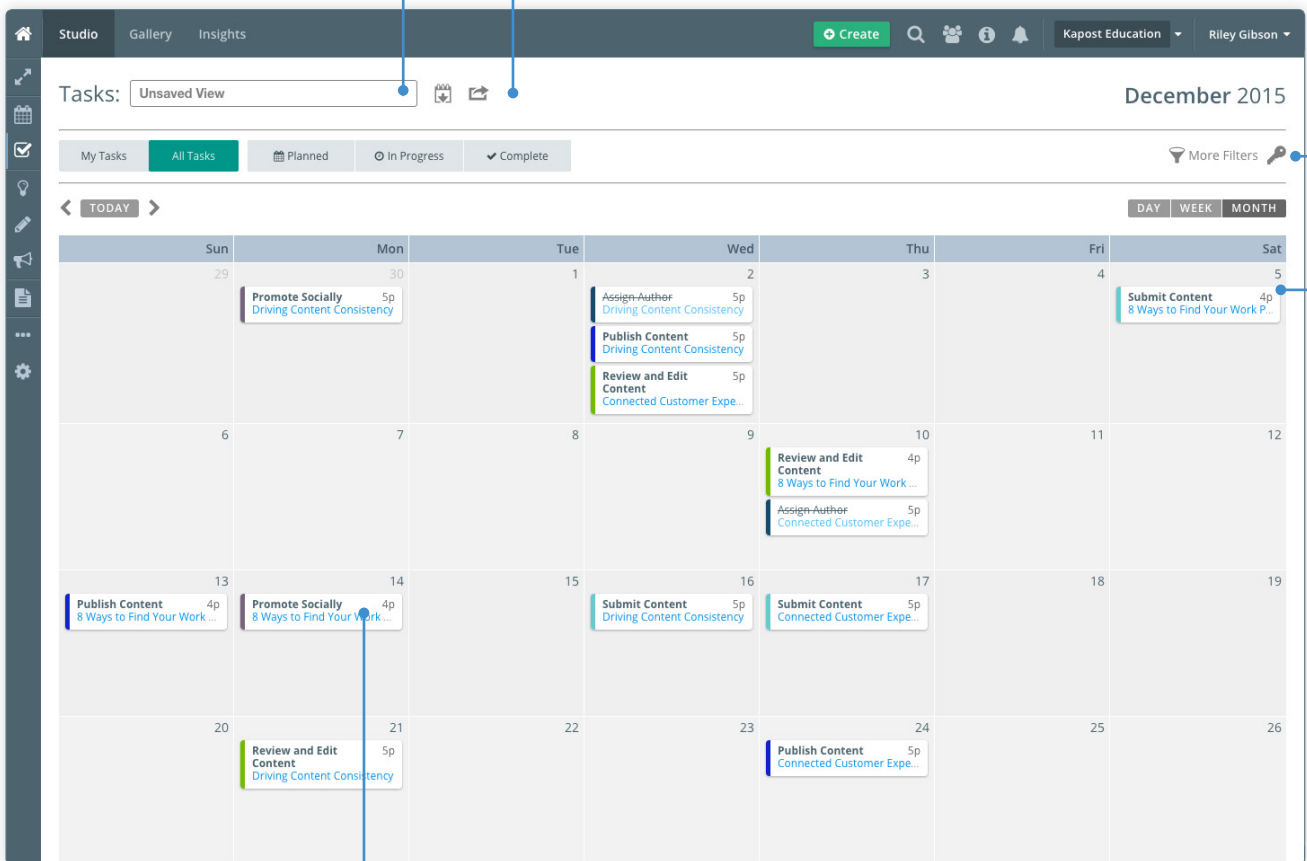
Using the Calendar

To create a new content assets, initiative or idea in Kapost, simply click the green “Create” button in the top right of your screen.

Just like creating custom saved task views, you can create custom Calendar views. Just use filters to get the right view - and then save the view by giving it a name.

Share a read only view of the calendar by grabbing a live link or getting embed code to embed a read-only calendar.

All tasks for content assets or initiatives will display in the Calendar.



Click to see a preview of the content. You can also Drag and Drop tiles to re-assign task dates more easily.

Filters let's you filter out any noise, so you can get the perfect calendar for you, your team, or a key stakeholder.

The “Key” let's you color code the calendar.

Kapost Glossary

Initiative: Multiple assets can be grouped together into an initiative. Initiatives typically represent a larger project, marketing initiative, or theme.

Initiative Templates: Initiative templates automatically add predetermined content assets to a initiative making it easy to run standard initiatives over and over. These templates can populate multiple assets in one click.

Initiative Type: Create different types of initiatives for larger events like product launches or web events to help organize content associated to a specific initiative. Initiative types can be adapted for your team.

Calendar: Where initiatives, content, and event dates can be easily created, viewed and shared in a calendar format.

Stages: Identify the status of your content and initiatives as planned, in progress, or complete by changing the content status for individual assets.

Content Type: Documents, videos, collateral and any other marketing assets you create. Content types, including the file type, can be adapted for your team.

Crowdsourcing: Crowdsourcing lets you gather ideas from external audiences (those without Kapost logins) via an online form. Crowdsourcing forms are accessed and shared using an external link. Ideas submitted via the form flow directly into your ideas tab inside Kapost and must be approved before they move into content production.

Ideas: Ideas capture incomplete concepts for future content creation. All submitted ideas will need to be approved before turning into content.

Instance: Your company's custom Kapost URL address.

Custom Fields (Meta data tags): These tags/fields let you capture unique data about your content that is specific to your company's needs. This data makes it easier to filter, find and run reports on content. They can be adapted for your team. Examples: *Product Line, Vertical, Region*

What's Next?

- 1. Visit the Kapost Help Center and Sign-up for Kapost's Self Service Portal.** Visit help.kapost.com to access our comprehensive education hub for of best practice and technical guidance articles and videos to help you learn the Kapost system. If you want to know how to submit a support ticket, or leverage our self service support portal, [this document](#) outlines the details and quick steps.
- 2. Visit the #1 Resource for B2B Marketers** - Our marketing team loves to share B2B marketing insights and news that will keep you on top of your game. Subscribe to our weekly Marketeer newsletter to receive the latest B2B marketing news, best practices, and case studies at marketeer.kapost.com/subscribe.
- 3. Sign-up for the Getting Started with Kapost Webinar** - Be sure to sign up for the Getting Started with Kapost webinar to jump start your learning and understanding of Kapost. Sign-up here: kapost.com/events.

