Content Admin Settings

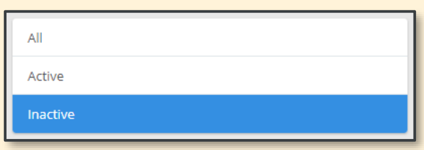
Table of Contents

Introduction

As a marketing administrator, when you set up a template and make that content available for members of your organization to use, there are a variety of options available to control how pieces based on the template will behave in Total Expert.

Navigate to **Manage Marketing → Manage Templates**. Then, for the template you want to modify settings for, select **Actions → Media Settings**. The available settings are described below.

> **Note**
> If you do not see the template you are looking for, it may be inactive. Click the Inactive filter on the left side of the page.



Depending on a template's definition, some of the settings described below may not appear for that template.

Media Settings Section

This section begins with a preview of the template to remind you of what you are working with as you fill out the settings.

Media Name – A name is required. The name of the template. The name provided when the template was saved is pre-filled and will remain in effect unless changed.

Description – A short description of what the template is and how it should be used. This text is shown along with the name in the list views of templates and saved print content pieces. (It is not shown in tile views.)

Reference Number – An optional reference code that can be used within your organization to identify orders based on the template. This is reflected in the Reference Number column on the Marketing Content report.

Expiration Date – Date on which the template will be moved from Active to Inactive for administrators on **Manage Marketing → Manage Templates**. Also on this date, the template will be removed from end users' lists on **Print Marketing → Create New** or **Web Marketing → Social Media → Create New** (as applicable).

- Previously created pieces based on the template remain viewable on **Print Marketing → Saved** even after the template expires, but they cannot be used to create new orders.
- Previously placed orders based on the template are unaffected on **Print Marketing → Orders** even after the template expires.

Download/View Link Text – Text that will be used for an Actions menu option on **Print Marketing → Create New**. This *only* applies to uploaded files and not to print or social media templates.

Hosted Download Content – A selection is required. If the template requires to content that is hosted elsewhere, select **Yes** and enter the URL of the relevant content in the External Content URL field. Otherwise, select **No** and leave External Content URL blank; this is usually the case.

External Content URL – The URL where content, such as a video, required by the content piece is hosted. Anything provided in the External Content URL field when the template was created is populated here. A user with access to a template including external content would not use it to place an order, but rather to view the external content via the Actions menu. This is used only on Total Expert–created content pieces and is left blank when Hosted Download Content is set to No.

Auto Archive – A selection is required. Select **Yes** to have the template automatically moved out of a user's list of available templates after that user creates one piece based on the template.

Status – Check this box to make the template available as Active for administrators on **Manage Marketing → Manage Templates**. Uncheck the box to move it to the Inactive section. This has the same effect as the Expiration Date passing, but it can be toggled at any time. Inactive templates can also be toggled back to Active at any time.

Applicable Pro Rata Share Markup – The cost share markup that will apply to pieces created from this template. Select a saved markup from the drop-down list. Saving a new value in this field also resets the markup set as active on the Media Markups page.

Published File Expiration Time – The number of days a saved draft or approved piece will remain available to users. When this time elapses, any saved pieces based on the template will no longer be available. However, the template itself remains available to create new pieces from, as long as the template itself has not also expired.

- The record of any orders placed is retained, even after a piece expires.
- While a piece remains available, the user can view or generate print orders from the piece.
- Enter `0` to make this unlimited (meaning the piece will never expire). You can manually archive a piece at any time on **Print Marketing → Saved** by selecting **Actions → Archive** for the piece.

Recreate Media – Check this box to allow users to create a new version of a saved content piece. All customization of the first piece (including MLS, co-marketing partner, and text changes in the piece) are retained. This means that the user does not have to start completely from scratch, but can use the published piece as a starting point. This option remains available as long as the Published File Expiration Time has not expired.

- If Published File Expiration Time is set to 0, this checkbox is not available.

- To recreate a piece, the user would navigate to either:
  - **Print Marketing → Saved**, then select **Actions → Recreate**.
  - **Print Marketing → Orders**, then click the button in the Actions column and select **Recreate Media**.

Folders – The names of any folders this template is saved in. Begin typing the name of an existing folder and select it from the drop-down list. You can list more than one folder. Use folders to group templates with a common connection on list pages.

Tags – The names of any tags applied to the template. To create a new tag, type the name and press Enter. To add an existing tag, begin typing the name and select it from the drop-down list. You can list more than one tag. Tags are searchable labels users can use to filter list pages to quickly locate desired templates.

Media Details Video Link – The link for a video providing an explanation of how the template should be used. A preview appears in the space below this field when you enter a valid video URL (such as a YouTube page).

- If a link is provided in this field, then when a user goes to **Print Marketing → Create New**, the Actions menu for this template will contain an option called **Video Explanation**. Clicking this triggers a popup to watch the video within the Total Expert page.

Social Media Settings Section

Social Media Networks – Check the boxes for any networks where a user should be able to share a piece based on the template. (A user must connect their TE account with the corresponding social media account before they can post to that network.) Networks that were selected when setting up the template are selected here by default.

Default Link – A link that will be included with the content in the post. The link is drawn from the posting user's account settings. For example, if you select User Website, when a user posts using this template, the post will automatically include whatever has been entered in the Website field of that user's settings.

- Check the **Allow Editing** checkbox to allow the user to alter the text of this link when creating the post.

Default Social Media Message – Any text entered here will be posted along with the content and the selected Default Link. Text that was entered when setting up the template is included here by default.

- Check the **Allow Editing** checkbox to allow the user to alter this text when creating the post.

Print Settings Section

The settings in this section are not editable. They are provided for reference only.

Print Company – The printer that any orders based on this template will be sent to.

SKU: TE SKU (Print Company SKU) – The stock keeping unit (SKU) used by Total Expert for the type of print product the template is, followed by the SKU used by the Print Company in parentheses.

Rates – The price thresholds charged by the Print Company for various numbers of copies of the assigned SKU.

Default User Settings Section

The settings in this section apply to all users in your organization unless they are overridden by Team Settings or User Settings set for the template.

Access – Check this box to allow any user in the organization to create a piece using this template. New users added to the organization after the template is set up will also receive access to the template automatically when they are created. For co-marketed pieces, a cost split markup must be saved before you can assign access.

Co-Marketing Partner Access – Check this box to allow co-marketing partners of any user in the organization to create a piece using this template. New co-marketers added by a user after the template is set up will also receive access to the template automatically when the accounts are linked. For co-marketed pieces, a cost split markup must be saved before you can assign access.

Proof Approval Process – Select an approval flow defined by your organization. Any attempt to publish a piece based on this template must be approved by the user(s) included in the selected approval flow.

Note
Specifying a Proof Approval Process is not required, but recommended for editable templates to ensure any alterations to the template meet your organization's compliance standards.

Organization Cost Share % – The percentage *of the share belonging to the user* who creates the piece from this template. For example, if a loan officer and real estate agent are to split the cost of pieces from this template 50/50, and this field is given the value 60, then if the loan officer creates a piece and submits an order worth $100, the organization would be responsible for 60% of the loan officer's $50 share, or $30. (The loan officer would then pay the remaining $20 from their share, while the agent would still pay $50.)

Organization Cost Share Approver – The user who must approve the cost associated with any orders where the Organization Cost Share % is not zero. Select a user from the drop-down list.

- If Organization Cost Share % is not zero, and no approver is selected, you will not be able to save the media settings.

Auto Pay – This option appears when a value is provided in the Organization Cost Share % field. Select **Yes** to bypass the organization's cost approval step. The selection in the Organization Cost Share Approver field will be ignored and the organization's share will be approved automatically. The default selection is No.