



Organizing Your Content Library

Planning

Total Expert recommends that you take some simple actions to keep your library of print, email, and social media content organized. Before changing or creating any content, develop a plan covering the system your organization will use to navigate your library. The conventions given below are recommendations provided by Total Expert, but you are free to use any system you like.

Whatever your plan is, follow through by applying it to each piece in the library. This will make it much easier for your users to find what they are looking for quickly when they need it. Not only will this keep your message going out to the right people at the right time, but it will drive adoption and use of the Total Expert platform among your users by making it easy to use. In addition, it will keep your users' experience consistent, even as your organization's content library grows.

Naming Convention

The name of each piece is visible to end users. Anything in the name is searchable. Give each piece a name with elements that makes it identifiable and easy to search, such as:

- A brief title
- The reference number (see below)
- Either **SB** for single-branded or **CB** for co-branded, depending on the layout of the piece
- The date the piece was created

Folders and Tags

Content pieces can be associated with any number of folders and tags. These are visible to end users as part of the listing for each piece. Neither folders nor tags are open to a text search, but a user can filter their library by them via drop-down menus.

To manage the folders and tags available for your organization, navigate to **Manage Marketing → Folders & Tags**. From this page, you can add, edit, or remove any folders or tags. It is a good idea to review this page regularly to ensure that there are no duplicates or unused options.

- This page is the only place you can create a folder.
 - Folders should be used to group pieces by broad concepts, such as Holidays.
 - A piece can be associated with more than one folder.
- Tags can be created here, but they can also be created when setting up a content piece or by an end user to further organize their personal library.
 - Tags should be used to associate pieces with more specific topics. For example, items in a Holidays folder might be tagged Halloween or New Year's.



Content Description

You can add a text description to any content piece. This is visible to end users, though it will be truncated when a library is displayed in grid view. Any text included here is searchable, so include as much information here as you like, such as:

- Full name of the piece
- Type, if not included in the name
- Branding information
- Intended audience
- Products mentioned
- Names of any folders and tags applied to the piece
 - Including these in the description makes them searchable.

Reference Numbers

A reference number applied to a print or social media piece is not visible to end users, but it is searchable. There is no reference number field in Total Expert's email editor, but you could add a number to the name and description.

If you have an existing numbering plan for content, you can continue using it in TE. If not, consider one of the systems below (or a combination of them). Either way, you will need to maintain any necessary documentation of the system and specific pieces outside of TE.

Example System: x####

- **x** represents a single letter indicating the type of piece. For example, **P** for print, **S** for social media.
- **####** represents a number, ordered sequentially starting from **0001** and counting up.
 - Plan for enough digits to cover future needs.

Example System: YYYYMMDDxxx

- **YYYYMMDD** represents the date the piece was created.
- **xxx** represents the initials of the person who created the piece.