



Using Self-Serve Print Content

The self-serve print content feature allows customers to create their own basic print marketing assets. Basic print assets are defined as assets that contain a dynamic footer, optional dynamic header, and a static background image as the main content of the asset. The self-serve print content builder is based on the concept of taking an existing organization template, duplicating the template, and then swapping out the background that contains the content for the asset.

Benefits

- **Save time and effort:** Free up your marketing administrators to focus on more strategic tasks by making it easier to create and assign basic marketing assets to a sales team in under 20 minutes per asset.
- **Independently produce content:** Empower marketing administrators to become more agile and productive by independently creating assets rather than relying on assistance from Total Expert.
- **Increase marketing-influenced leads:** Marketing administrators can independently produce content at scale to increase marketing output and ultimately influence more leads and prospects.

Use Cases

- **First-to-market assets:** Be first-to-market with new basic assets when new loan products become available or loan limits are updated.
- **Single-use flyers:** Easily create single-use flyers to draw attention to a variety of events or for your high-producing loan officers.

Step by Step

1. In the navigation menu, select **Manage Marketing → Manage Templates** and select the **Templates** folder.
2. Select **Actions → Duplicate** on the template you want to use.
3. In the pop-up window:
 - a. Enter a name in the **Name** field.
 - b. Select the checkbox for **Duplicate Access Settings**.
 - c. Click the **Duplicate** button.
4. When the duplication is complete, you will be taken to the Media Settings page. Review and update settings, as needed.
5. On the Media Settings page, select the **Edit Template** button.
6. Click the **Change Image** button to change the main background image of the asset. In the pop-up window, click to upload, or select an image, then click the **Update Main Image** button.
7. Select the blue drop-down arrow next to **Publish → Test Dynamic Content**. In the pop-up window, select a lender and co-marketing partner from the drop-down menus and select the **Update Preview** button to test any appropriate footers and/or headers, as well as logos and other dynamic information, in the template.
8. When you are done editing the template, select the blue drop-down arrow next to **Publish → Generate PDF** to download a PDF of the asset to your local drive to test and verify accuracy.



9. To officially activate and publish your new asset, click the **Publish** button. In the pop-up window, click the **Publish Asset** button.
10. If your new piece is co-branded, assign a cost split markup via your normal process.
11. Assign access via Team Settings and User Settings via your normal process. Once assigned, loan officers and co-marketing partners will be able to use and customize the asset by selecting **Print Marketing → Create New**.
12. Once a new piece has been created with that template, navigate to **Print Marketing → Saved** and select **Actions → Print & Ship** or **Actions → Generate PDF**.

Best Practices

- When duplicating templates, also duplicate its Access Settings.
- Use the downloaded PDF version of the asset as the source of truth.

Tips

- All assets created using this process by users in your organization can be edited by users in your organization. Any assets created by Total Expert will need to be deactivated and re-created by your organization to perform edits.
- All assets created using this process will require new cost split markups.
- Export images from InDesign at a maximum of 300 dpi with bleeds.
- Make sure to leave room at the bottom of the InDesign image to allow for the template footer.
- Total Expert will still need to create any new base templates.

Verify

If you are not seeing the results you expect with your new self-serve template, verify the following:

- Are you duplicating an approved template from the Templates folder?
- Is the Status set to Active?
- Has a cost split markup been assigned?
- Has access to this piece been assigned via Team Settings and/or User Settings?