



Content Editor

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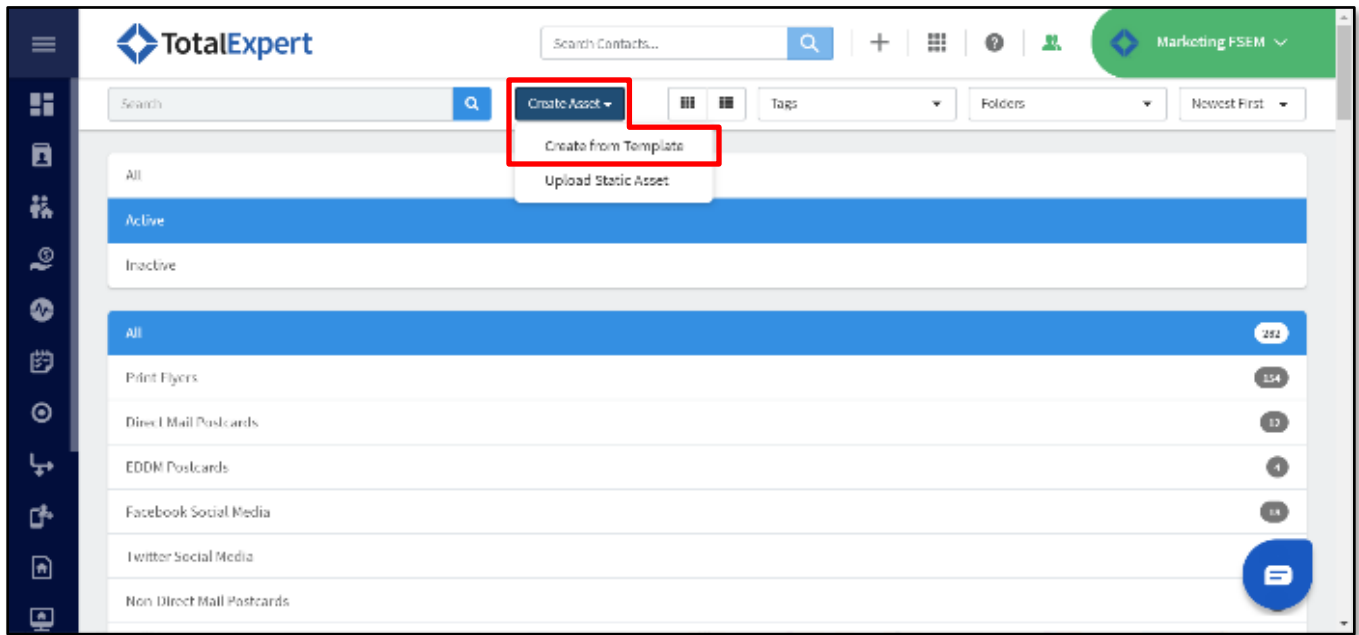
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Print and Social Content Editor

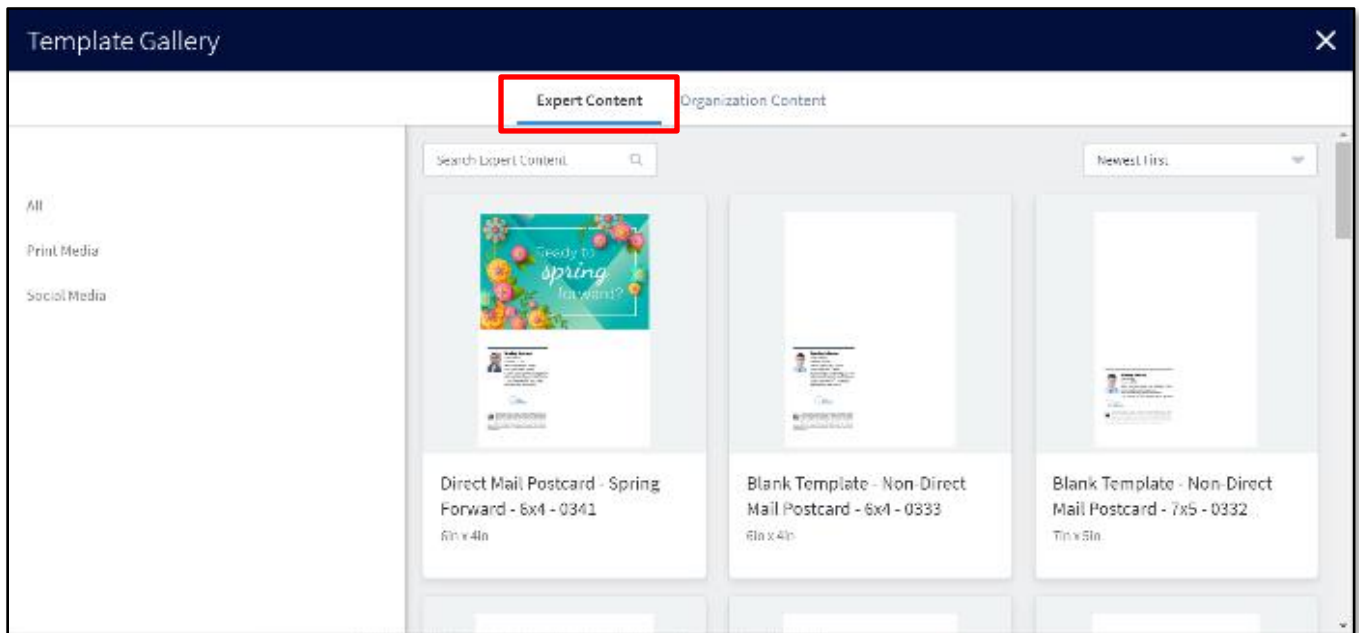
Total Expert’s print and social content editor allows your users to get your content to market quickly and deliver an optimal brand experience by creating basic print and social media assets with an easy-to-use interface.

Creating a New Template

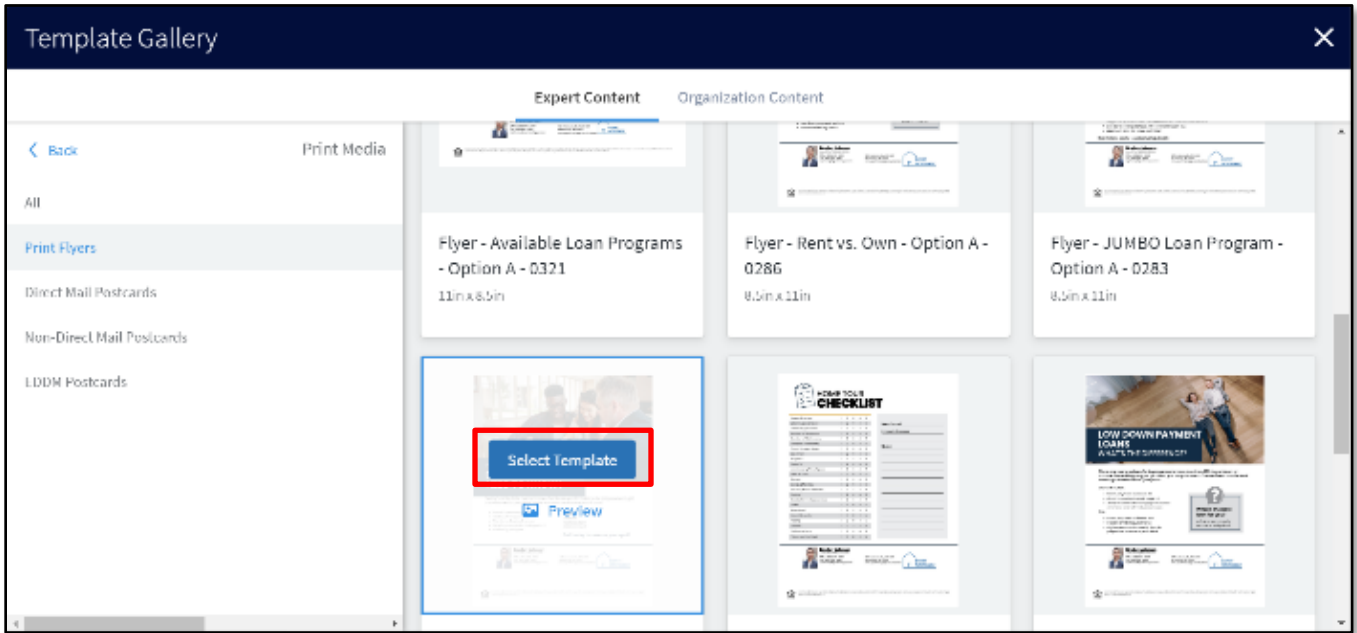
1. Navigate to **Manage Marketing → Manage Templates**.
2. Click the **Create Asset** button and select **Create from Template** from the list.



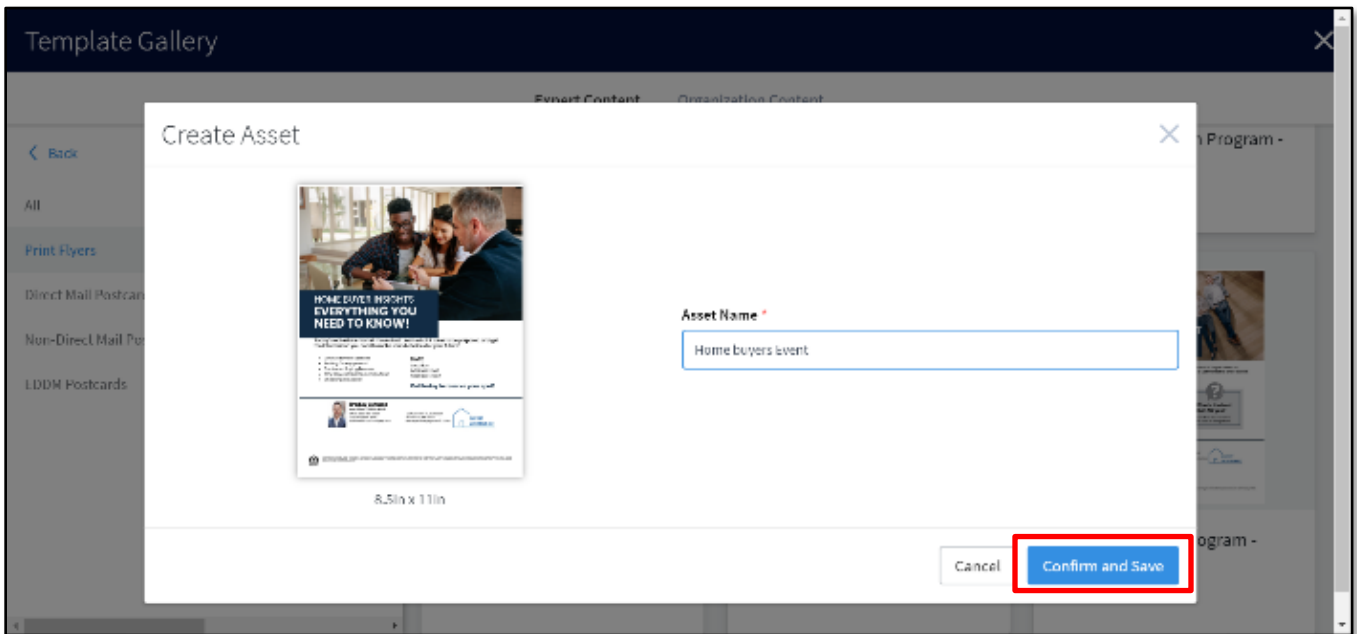
3. In the template gallery, click the **Expert Content** tab.



4. Locate the Expert Content piece you want to use, hover over the piece and click the **Select Template** button.



5. In the Create Asset dialog box, enter a name for your template in the **Asset Name** field.
6. Click the **Confirm and Save** button to enter the content editor.



Working in the Content Editor

The content editor has the following features:

- A header bar, including
 - A Back button on the left side, which returns you to the media list. You will be prompted to confirm this, as unsaved changes will be lost.
 - The name you provided. Click in this field to change the name.

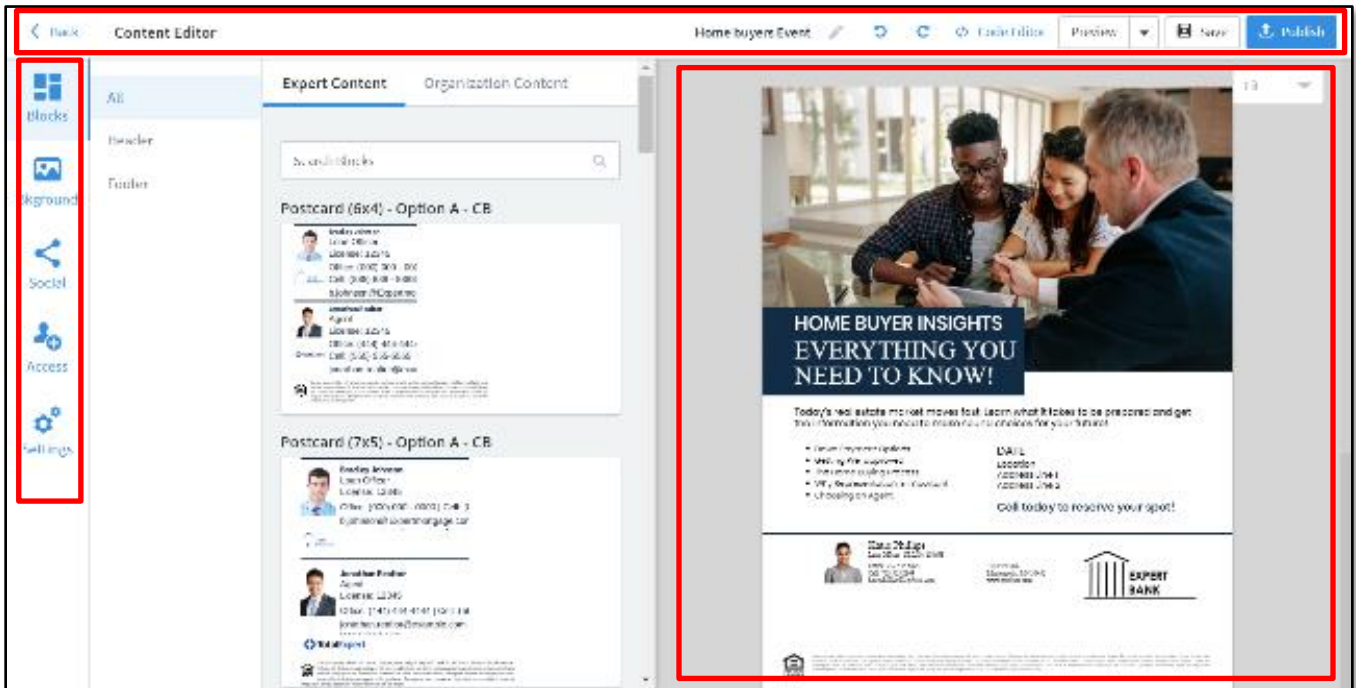


- Undo and Redo buttons. These apply only to actions applied in the preview area, not settings selections in the sidebar.
- A Code Editor button, which opens a panel with all the code building your template. It is not necessary to use this.
- Preview, Save, and Publish buttons. See details on these below.

Tip

Save often!

- Several tabs on the left side. Clicking each tab reveals various options available for your template. These are covered in detail below.
 - Blocks
 - Bkground
 - Social
 - Access
 - Settings
- A preview of the current state of the content you are working on, including any changes you have made to this point in a WYSIWYG editor.
 - In the upper-right corner of this section, you can click the **Zoom** button to select whether the piece should **Fit** on the screen or **Fill** the available display width.



Sidebar

Blocks

Blocks are pre-built header and footer sections that you can easily add to a template. In the first panel to the right of the sidebar, you can filter by **Header** or **Footer** blocks or view **All** at once. The relevant blocks are shown in the

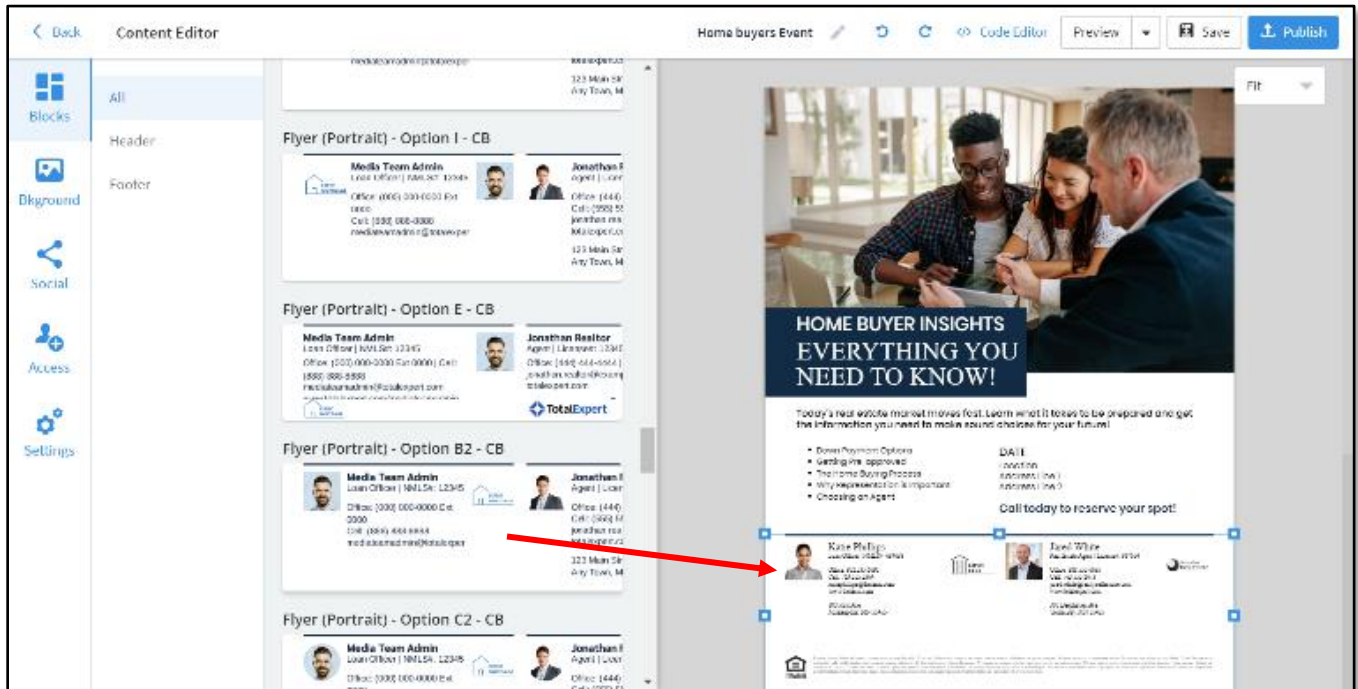


second panel, further filtered by the tab selected at the top of the panel, either **Expert Content** or **Organization Content**, and by the text search box. Look for blocks that match the type of template you are building (for example, Flyer or Postcard). Single-branded and co-branded options exist. The Blocks tab is depicted above with the filters set to All and Expert Content.

Click a block in this panel, and it is inserted into the appropriate location in the preview. The images and information shown in the thumbnails are placeholders; relevant information will populate when it is placed in the template preview. You can swap blocks as many times as you like.

Note

Do not attempt to drag and drop a block onto the preview; this does not work. Simply click the block you want.



Background

The background image appears centered on your template, behind any text or graphics. Click in the **Select Image** area. Then in the Select an Image pop-up box, upload an image or enter the URL to an externally saved file.

You can adjust the location of the background image slightly using the controls in the Background Position field.

Social

If your template is suitable for sharing on social media, this is where you set relevant options.

1. Check the boxes for the sites where you want to allow it to be shared. A user with access to the template will be able to post to any of the sites you select here. If the template should not be shared on social media, ensure that all the boxes are unchecked.
2. In the **External Content URL** field, select a website to be included as a link with the post. Options are User Website, User Testimonial Website, and User Application URL, all of which draw from the user settings of the user creating the post.



- a. Click the **Editable** toggle switch to allow the posting user to modify the link before posting.
3. In the **Default Message** field, enter the text that should be posted along with the template.
 - a. Click the **Editable** toggle switch to allow the posting user to modify the message before posting.

Social Media

External Content URL Editable

Select or create a source

Default Message Editable

0 / 280

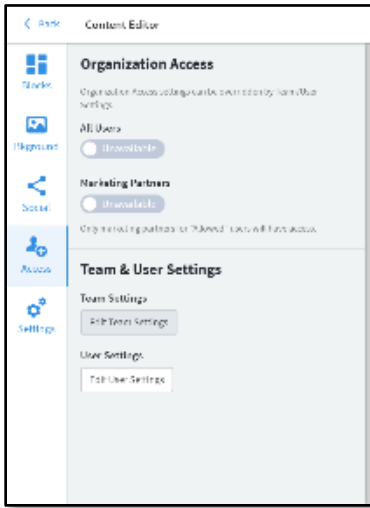
Access

You can grant access to use the template at the organization, team, or user level. You can also grant access to co-marketing partners of users with access.

Click the **All Users** toggle switch to grant access to every user in your organization. New users added to the organization after the template is set up will also receive access to the template automatically.

Click the **Marketing Partners** toggle switch to grant access to any co-marketing partners of your users who have access. If a user does not have access to the template, then their co-marketing partners will not have access either, even if this is switched on.

Click the **Edit Team Settings** or **Edit User Settings** buttons to open a pop-up window to select team or user settings, respectively. Select the checkboxes for any teams or users you want to have access, and click the Change Settings button to open a slide-out panel where you can add access, deny access, or clear all settings for the selected users or teams. Click the **Submit** button to close the panel and click the **X** in the upper-right corner to close the pop-up and return to the content editor.



Tip

Assign a cost split markup in the Settings tab before assigning access for co-marketed templates. A template with a co-marketing footer must have an active cost split markup before it can be assigned to teams or individual users.

Note

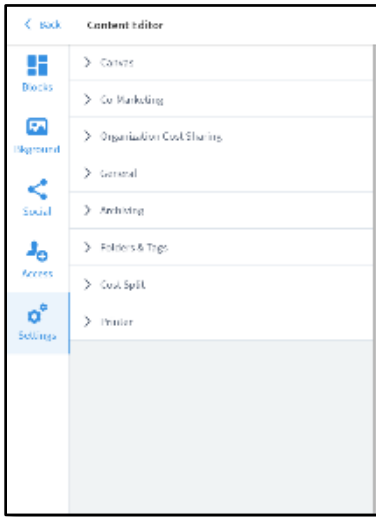
Team settings override global settings, and user settings override both team and global settings. The most granular setting takes precedence.

Whatever access settings are in place when you publish the template will determine which users (and co-marketers) will be able to use the template.

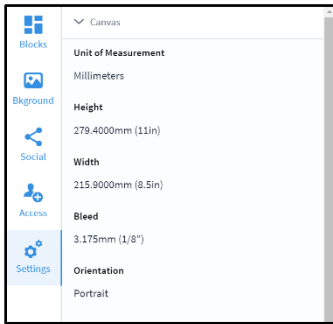
Settings

The Settings tab has several collapsible sections. Click on a section name to expand or collapse the section.

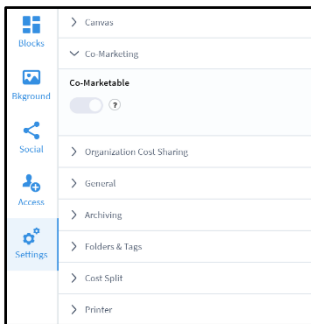
- Canvas
- Co-Marketing
- Organization Cost Sharing
- General
- Archiving
- Folders & Tags
- Cost Split
- Printer



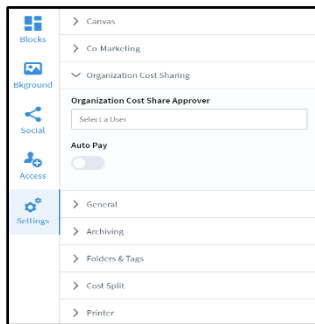
The **Canvas** section displays the dimensions and shape of the template. This information is read-only.



The **Co-Marketing** section contains a toggle switch to determine whether the template can be shared with co-marketing partners. The switch is automatically turned on and cannot be turned off when a co-branded footer has been applied.

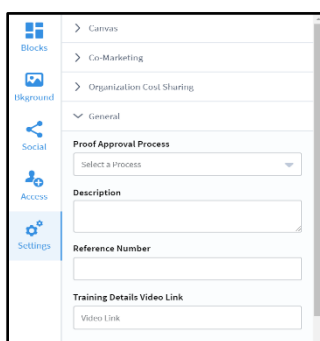


The **Organization Cost Sharing** section allows you to define how the cost is shared between the user and the organization. Move the **Organization Cost Share %** slider to the percentage of the user's share of the cost that should be paid by the organization. (Any co-marketer would still pay their full share, as determined by the cost split applied to this template.) Select a user from the **Organization Cost Share Approver** field to be the person who approves any cost undertaken by the organization for pieces based on this template. If the organization's share should be paid automatically, toggle the **Auto Pay** switch on.



The **General** section contains several options, all of which are optional.

- **Proof Approval Process** – You can assign an existing approval flow here by selecting it from the drop-down list. This requires one or more users to review and approve any piece based on this template before it can be sent out. This is recommended for editable templates to ensure any alterations to the template meet your organization’s compliance needs.
- **Description** – Enter a text description that will help users understand what the template is.
- **Reference Number** – If your organization uses reference numbers, enter an identifying code here according to your system.
- **Training Details Video Link** – Enter a link to a video that explains how to use this template.
- **Host Download Content** – If the template requires to content that is hosted elsewhere, toggle the switch on and enter the URL of the relevant content in the External Content URL field. Otherwise, leave the switch off 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 turned off.

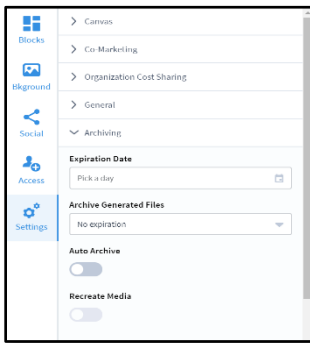


The **Archiving** section allows you to define how the system handles expiring and archiving the template.

- In the **Expiration Date** field, select the date on which the template will be moved from Active to Inactive for administrators and removed from end users’ list of available templates. Previously created pieces and orders are not affected when the template expires.

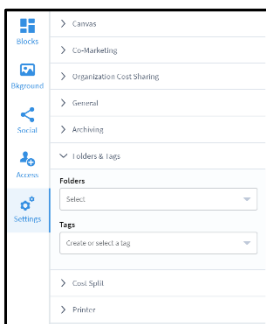


- In the **Archive Generated Files** drop-down list, select a timeframe during which a user's piece based on this template will remain available to them. The template itself remains available as long as it has not also expired.
- Switch the **Auto Archive** toggle on to have the template automatically moved out of a user's list of available templates after that user creates one piece based on the template.
- Switch the **Recreate Media** toggle onto allow users to create a new version of a saved content piece, including any customization options. This allows the user to use the saved piece as a starting point as long as the timeframe selected in Archive Generated Files has not expired. This option is not available if Archive Generated Files is set to No expiration.



The **Folders & Tags** section allows you to determine how the template will be organized.

- In the **Folders** field, begin typing the name of an existing folder and select it from the drop-down list. Use folders to categorize templates with a common connection, so users can search for them. You can assign a template to more than 1 folder. Folders are broader in scope than tags.
- In the **Tags** field, begin typing the name of an existing tag and select it from the drop-down list, or type a new tag name and select it. Tags are searchable labels that users can use to filter list pages to quickly locate desired templates. You can assign multiple tags to a template. Tags are more granular than folders.

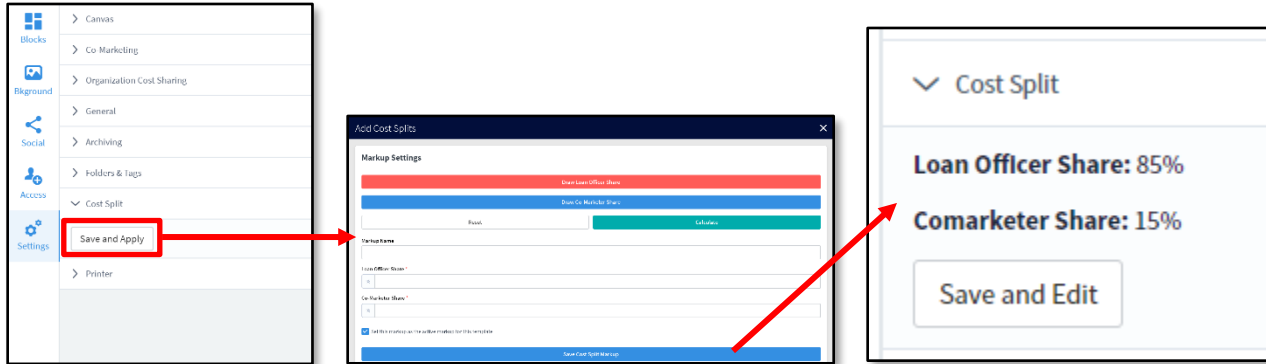


The **Cost Split** section only appears when the switch in the Co-Marketing section is turned on. The setup selected here only applies to orders sent to a professional printer that requires both parties to pay a share.

1. Click the **Save and Apply** button. The Add Cost Splits pop-up window opens.
 - a. If a previous markup is in place, click the **Redraw Markup** button.
2. Draw rectangles to represent each payer's share of the piece. These are referred to as Loan Officer Share (red) and the Co-Marketer Share (blue).
3. Click the **Calculate** button to determine the shares based on the markup.

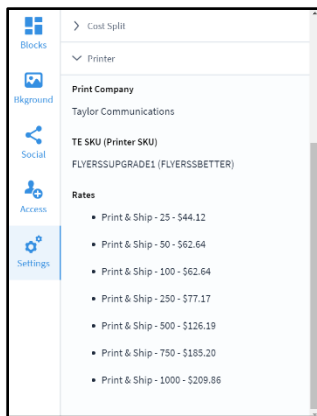


4. Enter a name for this markup. We recommend a markup name using the percentage followed by your initials. For example, 89%LO11%CMP – ABC.
5. Ensure the **Set this markup as the active markup for this template** box is checked.
6. Click the **Save Cost Split Markup** button to save the new markup.
7. Read the confirmation message and click the **Continue** button. You are returned to the content editor. The respective shares are now displayed in the Cost Split settings section.



For more information, refer to *Cost Split Markups*.

The **Printer** section lists which print vendor that any orders base on this template will be sent to along with the stock keeping unit (SKU) for the template used by the Total Expert platform (and the printer’s SKU in parentheses). This is followed by the price thresholds charged by the specified print vendor for their assigned SKU. This information is read-only.



Preview Area

You can modify the content of any text or image element in your template. In addition, you can create up to 8 options, or *presets*, for each element that a user can select from when building a piece from this template.

Image Presets

Click an image element. A pop-up options box appears to the left.

- Click the **Crop Image** button in the upper-right corner to allow you to resize and adjust the placement of the image in the allotted space. However you crop an image is how it will be saved in the presets.



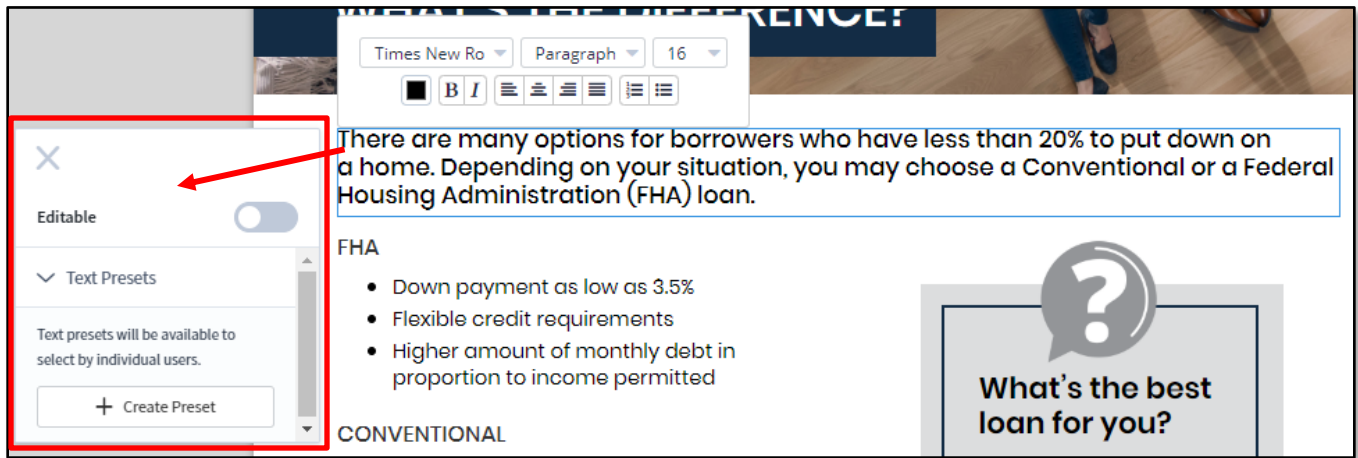
- If you want to allow users to add their own image to this space, switch the **Allow Image Uploads** toggle on. With this off, users will only be allowed to select among your preset selections.
- The default image is included as a preset.
 - To create an additional preset, click the **+Create Presets** button. Upload images or enter the URLs to externally saved files. These are added to the gallery in the pop-up box.
- Whichever preset you select to have inserted in the template will be the default presented to an end user; this is indicated by a green check icon in the pop-up box. To switch the default, click the image in the template, then click the image of the desired preset.
- You can remove an image from the gallery by hovering over it and clicking the trash can icon.



Text Presets

Click a text element. A pop-up options box similar to the image options box appears to the left.

- If you want to allow users to modify the text in this element, switch the **Editable** toggle on. With this off, users will only be allowed to select among your preset selections.
- The default text is *not* included as a preset by default.
 - If you want to make the default text a preset, click the **+Create Preset** button. Enter a name for the preset and click the **Save** button.
 - To create an additional preset, click the **+Create Preset** button. Enter a name and click the **Save** button. Then, click the pencil icon to edit the preset, modify the text in the text area, adjust its formatting via the toolbar above it (font type, color, style, and size; paragraph style and alignment; and optional bullets or numbering), and click the **Save** button again.
- Whichever preset you select to have inserted in the template will be the default presented to an end user. To switch the default, click in the text area in the template, then click the name of the desired preset.
- You can remove an option from the list by clicking the trash can icon.



Header Buttons

Preview

Click the **Preview** button to view pop-up window with a full mockup of the template using current settings. Here, you can save a PDF version of this and even test the dynamic content elements by selecting a user and co-marketer whose information will be applied to the preview. Click the **X** in the upper-right corner to close the pop-up and return to the content editor.

Click the down arrow and select **Generate PDF** to save a PDF copy of the template using current settings.

Click the down arrow and select **End User View** to step through the process an end user would see when building a piece with this template.

1. Select the user and co-marketing partner whose information should appear on the piece.
2. Click the **Preview** button.
3. Click on any elements with saved presets. You are presented with the exact options a user would see based on the options you set up. This allows you to anticipate what users would interact with your preset options.
4. Click the **X** in the upper-right corner to close the pop-up and return to the content editor.

Save

Click the **Save** button often to ensure your changes are retained.

Publish

When you are satisfied that the template setup and settings are to your liking, click the **Publish** button. If any required options have not been set, such as a cost split, you are notified to complete this before you can proceed. If everything is ready, the Publish Asset pop-up window appears. Here, you can upload a custom thumbnail that users would see for this template in their list. If the template is co-marketable, you also have the option to modify the cost split that you selected. If you are satisfied, click the **Publish Asset** button.

At this time, the template is made available to any users allowed by the Access settings. It is also available under the Active filter at **Manage Marketing → Manage Templates**.



The content editor refreshes, and the Publish button is now an Unpublish button. Click the **Unpublish** button to return the template to an inactive state. If you make changes and click the Save button after publishing, the button changes back to Publish; this alerts you that there are unpublished changes.

Template Actions

Once you have saved the template, you can click the **Back** button at the left end of the header. This returns you to the list at **Manage Marketing → Manage Templates**. If you published your template, it is available with the Active filter on; otherwise, select the **Inactive** filter on the left side of the page.

You can return to edit the template further by selecting **Actions → Edit Template** for the template you created. You can also perform some of the actions available in the content editor covered above, such as setting a cost split markup and various settings, including user and team access.

Note

Many of the options in the sidebar are also available to edit for a template outside the content editor. See *Content Admin Settings*, *Cost Split Markups*, and *Organizing Your Content Library* for more information.