



Implementation Customer Content Resources

Note

Resources labeled with **Custom Content Only** require a content hours package. Please reach out to your implementation manager or email contentmarketingservices@totalexpert.com for more information.

Best Practices

Branding

Covers the items Total Expert needs to ensure we have all the necessary branding information that matches your company standards. Required for submitting branding tickets.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000282989-customer-branding-workbook>

Email

Custom Content Only – Includes an overview of email best practices, sizing requirements, and email-safe fonts. Review is required for building email signatures.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279089-email-signature-best-practice-simulation>

Print Templates & Assets

Custom Content Only – Sizing requirements, standard template and asset examples, and terminology.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279788-content-print-marketing-templates-assets>

Sizing Guide

Custom Content Only – Sizing requirements for all media types, including flyers, postcards, and social media assets.

<https://totalexpert.freshdesk.com/en/support/solutions/articles/22000284074-total-expert-content-library-standard-sizing-guide>



Disclaimers

Adding Disclaimers

Includes naming conventions; DBA disclaimer considerations; example disclaimers for print, Web, and email; and step-by-step instructions on adding disclaimers into the disclaimer library.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279787-content-disclaimers>

Updating Email Disclaimers

Instructions on updating, adding, and removing disclaimers from individual emails using the email builder.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279592-updating-email-disclaimers>

Self-Serve Disclaimer Guidelines

Step-by-step instructions on adding and overriding disclaimers on individual self-serve print assets.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279789-content-self-serve-disclaimer-guidelines>

Expert Content

Self-Serve Print

Instructions and best practices for using self-serve print content.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279629-using-self-serve-print-content>

Content Toggles

Explains what content toggles are and how to use them, including detailed examples.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000281372-content-toggles>

Print Toggle Simulation

Instructions on using the toggles included in Expert Content print templates. These toggles further customize Expert Content to better match your brand standards.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000282483-self-serve-print-toggles-simulation>

Social Media Library

A strategy guide on the designs offered in the social library.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000282026-expert-content-social-media-library>



Content Library

Organizing

Provides guidance on planning and organizing your content library, covering naming conventions, folders and tags, and content descriptions.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279632-organizing-your-content-library>

Content Testing

Custom Content Only – Step-by-step instructions for testing custom content—an important step in the Total Expert custom content process. This allows you to review content to ensure it meets compliance and brand requirements.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279633-customer-qa-instructions>

Static Content

Step-by-step instructions and visuals on uploading static content into your content library.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279631-static-content-uploader>

Content Tools

Summarizes the capabilities of each content creation tool on Total Expert.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279881-content-tools-matrix>

Submission Requirements

Requirements

Custom Content Only – TE's content requirements for creating custom content. Use this as a checklist while creating custom content and before submitting your final content requests.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000282538-customer-submission-requirements>

Marked-Up PDFs

Custom Content Only – What to include and what not to include in the marked-up PDF TE requires when you submit custom content, along with an example. This helps us understand the functionality and details of your custom template or asset.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000279785-content-marked-up-pdf-examples>



Navigating Freshdesk

Training Video

A 30-minute training video on how to submit content requests in Freshdesk.

<https://totalexpert.freshdesk.com/support/solutions/articles/22000282593-freshdesk-training-webinar>

Quick Start Guide

Includes the link to the Freshdesk portal and step-by-step visual instructions on submitting requests in Freshdesk. (If you have trouble accessing Freshdesk, please let your coordinator know.)

<https://totalexpert.freshdesk.com/support/solutions/articles/22000282530-freshdesk-quick-start-guide>