State Disclaimers Setup Guide

State disclaimers allow your organization to store and manage required legal language for each US state where your users are licensed. These disclaimers are entered and maintained in your organization's disclaimer library and mapped by state abbreviation (for example, MN for Minnesota).

Behind the scenes, the system compiles the relevant state-level disclaimers into a single output based on each user's licensing. This compiled output is stored as an internal attribute that can be added to your content when needed.

Setting up state disclaimers ensures that the content is available, but *it does not automatically add it to your marketing materials*. These disclaimers must be intentionally added to content; please contact the Content Marketing Services team if you are unsure whether this is configured.

Who Should Use This Guide?

This guide is designed for marketing administrators who manage branding and compliance settings in Total Expert. To follow this guide, you must be familiar with the disclaimers library.

Step 1: Access the Disclaimers Library

1. Log in to Total Expert.
2. Navigate to **Manage Marketing → Disclaimers**.

The library is presented as a table, with each row representing 1 saved disclaimer.

Step 2: Add State-Specific Disclaimers

To set up state-specific disclaimers from the disclaimers library page:

1. Click the **+Create** button.
2. In the slide-out panel:
    a. In the Disclaimer Name field, enter the state's postal abbreviation (for example, MN for Minnesota). This is required for the system to match disclaimers correctly.
    b. In the Disclaimer Description field, enter the full legal text of the disclaimer associated with the state (for example, the Minnesota state disclaimer).
    c. In the Disclaimer Type drop-down list, select **Sub-Disclaimer**.
    d. Click the **Submit** button.

Disclaimer Settings

Disclaimer Name* Example: Standard_Disclaimer	MN

- No spaces allowed; can use underscore between words
- Allowed characters A-Z a-z 0-9 _ - * ( ) #

ℹ️ Disclaimer Name is not editable after "Submit"

Disclaimer Description: Minnesota State Disclaimer

Disclaimer Type*: Sub-Disclaimer

Note

Create standard disclaimers (for print, email, and social media) in the disclaimers library without state legal text. The recommended practice is to append state disclaimers to your standard disclaimers using this method. This approach ensures that only relevant state disclaimers appear for each user.

Step 3: Add State Names to User Disclaimers

To ensure disclaimers work correctly:

1. Navigate to **Organization Admin → Users**.
2. In the list of users, locate the user whose information you want to update and select **Actions → Edit**.
3. On the user configuration page, click the **Disclaimers** tab.

4. For each state disclaimer you want to create:
    a. Click the **+Add New Disclaimer** button.
    b. In the Add Disclaimer box:
        i. In the Disclaimer Name field, enter the state's postal abbreviation (for example, MN for Minnesota). This must match the name used in the disclaimers library.
        ii. Leave the Disclaimer Text field blank.
        iii. In the Disclaimer Type drop-down list, select **Sub-Disclaimer**.
        iv. Click the **Submit** button.

Add Disclaimer

Disclaimer Name

MN

Disclaimer Text

Disclaimer Type

Sub-Disclaimer

Close   Submit

The disclaimer is added to the list for that user.

Warning

Leave the Disclaimer Text field blank in this box. The actual disclaimer text will be populated from the corresponding disclaimer from the disclaimers library.