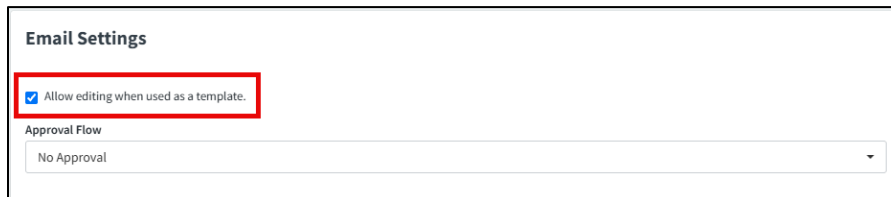


Getting Started with Element Locking in Email Builder

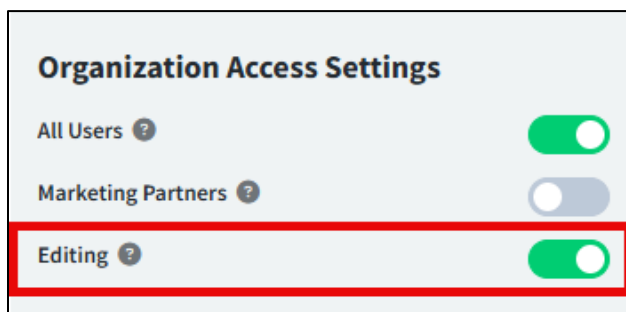
This guide features 5 scenarios to help you get started with email builder element locking functionality. Element locking allows you to mark individual elements within an email template as “editable” and “uneditable” or “deleteable” and “undeleteable”. This gives admins a crucial level of control and ensures compliance details remain intact, while allowing loan officers to add the content they want to share in their own voice and tone. The scenarios and recommendations highlighted below are only a few ways that element locking can be utilized.

General Best Practices

- Always lock down the compliant signature block in emails with any level of editability.
- When publishing at the user-, team-, or org-level, the “Allow Editing” button or toggle (see below) is the primary “switch” to determine whether an email can be edited. Even if you leave every element unlocked, if this option was not selected upon publishing the template, the email will not be editable by the end user.



The screenshot shows the 'Email Settings' section. A red box highlights the checkbox labeled 'Allow editing when used as a template.', which is checked. Below it is the 'Approval Flow' dropdown menu, currently set to 'No Approval'.



The screenshot shows the 'Organization Access Settings' section. It has three rows: 'All Users' with a green toggle, 'Marketing Partners' with a grey toggle, and 'Editing' with a green toggle. A red box highlights the 'Editing' row.

- Based on how elements and rows are locked, here is the expected behavior:

Element	Row	Behavior
Unlocked	Unlocked	Can fully edit, move, or delete the element and the row.
Unlocked	Locked	Can edit the element, cannot delete the row or the element.
Locked	Locked or unlocked	Element is locked and uneditable. Row cannot be deleted.

1. Rate Quotes

Application

- Start with Expert Content rate quote email templates.
- Lock the rate table when it pulls in data dynamically from the rate quotes feature, integrated with Optimal Blue or Polly.
- Lock the text box with the “Rates as of” date.
- Leave a text box editable for loan officers to add a personal message – allowing them to be the trusted advisor.
- Lock the image and text rows to ensure the elements don’t get deleted, if appropriate.

Considerations

- Relies on completely accurate pricing coming from the PPE into Total Expert.
- Approval flow needs for emails with locked down rates, but editable text.

2. Rate Updates/Editable Rates

Application

- Start with Expert Content rate quote email templates.
- Create an editable rate table and text box.
- Lock the signature block.
- Send email through approval flow prior to the email going to the customer, as desired.

Considerations

- Creating a comprehensive, editable rate table means that LOs can choose to either use the fields available or delete rows, depending on the pricing information they want to include in the email.

3. “Blank” Templates

Application

- Start with *Basic Content*, Expert Content “blank single- or co-branded, Just Listed, or Just Sold templates.
- Add as many different types of element blocks as you think your LOs might want. Make them all editable so LOs can either use them, move them, or delete them from the email.
- Lock the signature block.

Considerations

- What types of email formats and editability configuration would encourage your LOs to use and send emails in Total Expert?
- This idea could also be applied to more specific use cases with “blank” templates available and themed to just listed/just sold partner properties, events, etc.

4. Holiday Messages

Application

- Use Expert Content holiday messaging to complement or supplement your existing campaigns.
- Utilize marketing-approved images and text, while giving LOs a blank text box to add in personal messages.
- Lock the signature block.

Considerations

- Would you want emails to go through approval flows with one text box as editable?
- If you use Campaign Builder for holiday email blasts, consider having a fully blank and editable holiday template for LOs to use instead.

5. Agent Newsletters

Application

- Use the weekly Expert Update newsletters and adjust imagery and editability, as desired.
- Leave everything editable/deleteable to allow loan officers to choose which information they want to leave in the newsletter.

Considerations

- Agent newsletters are often sent via marketing admins through Campaign Builder but consider if there is value and/or a need from sales users to provide relevant market information in their own voices.
- What types of compliance and approval mechanisms may be needed for partner communications?