

The Expert Academy Admin Onboarding Handout: 5 Things You Need to Know

1. **Campaign Builder** allows you to deploy email communications quickly and easily to a specified audience.
 - The senders, audience, and content are configured by the marketers.
 - This tool allows organizations to send the same message at the same time to the recipients of their choosing.
 - Common use cases include newsletters, organization-wide initiatives, and company notifications like holiday hours and system outages.
2. **Pipeline Views** are org-wide tabs on the Leads & Contacts page that allow admins to publish saved, segmented contact lists to their users.
 - Consider each tab as a category of related saved lists.
 - You can publish tabs out to individual teams of users or to everyone in your org. LOs can also create their own tabs with related lists.
 - Check out our [Pipeline Views Playbook](#) in the Help Desk for suggestions and best practice configurations.
3. **Expert Content** includes emails, print and web marketing, and journey campaigns which have been designed in-house by our Expert Content team and distributed to our customers, free of charge.
 - Expert Content can be used “out of the box”, completely customized, or mixed and matched.
 - A newsletter is created and published on a regular basis to keep you informed of newly available Expert Content.
4. **Email Builder** is a drag-and-drop email building tool.
 - With multiple layouts and elements available, marketers can easily create beautiful, designed emails which include text, image, video, buttons, and other content.
 - Using the email builder, marketers can create emails from scratch, use our prebuilt layouts, or edit Expert Content emails provided by the Total Expert team.
5. **The Help Desk** is the hub for all things related to Total Expert product training.
 - The Help Desk includes user guides, webinar recordings, videos, and eLearning courses to help all users learn how to use the features and functionality within Total Expert.
 - These resources can be used to create your own internal training course for new users or can be used to complement your own curriculum.
 - New resources are created and optimized as the Total Expert platform evolves.
 - The Help Desk can be accessed within the platform by clicking the Help Center in the upper-right hand corner and selecting Help Desk.