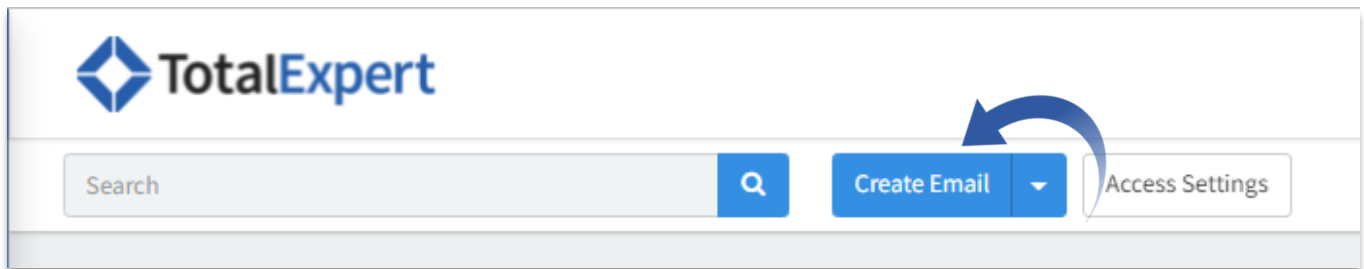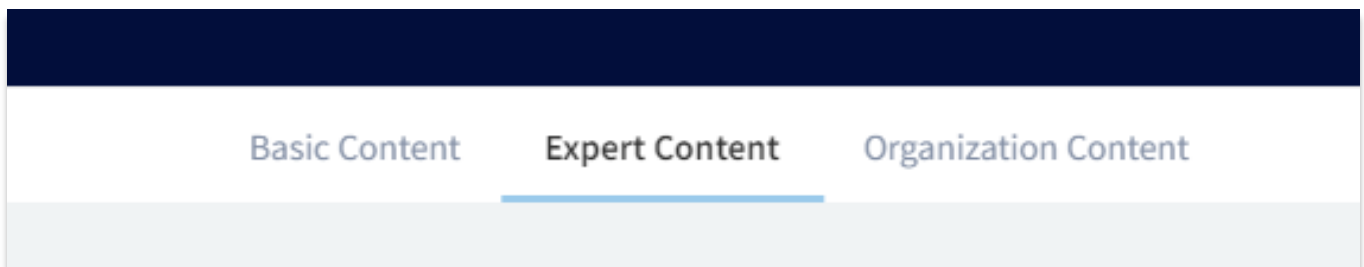## Accessing the Newsletter

1. To obtain the Newsletter, you must first open the "Expert Content Gallery." To view the gallery navigate to **Create Email**.

2. Once in the template gallery you now have access to a new tab at the top of the page labeled "**Expert Content**".


3. Within this tab you are able to select the Newsletter the same as any other template, name it, and have it copied to your Organization content to edit and send. Please note: When the email is copied from the Expert Content Gallery the following are preserved:
   a. Footers (Uses the Organization's CB or SB Footers)
   b. Tags
   c. CSS

Accessing the Newsletter (continued)

4. The newsletter will now appear in your library to edit in the new Email Builder.

Basic Content   **Expert Content**   Organization Content
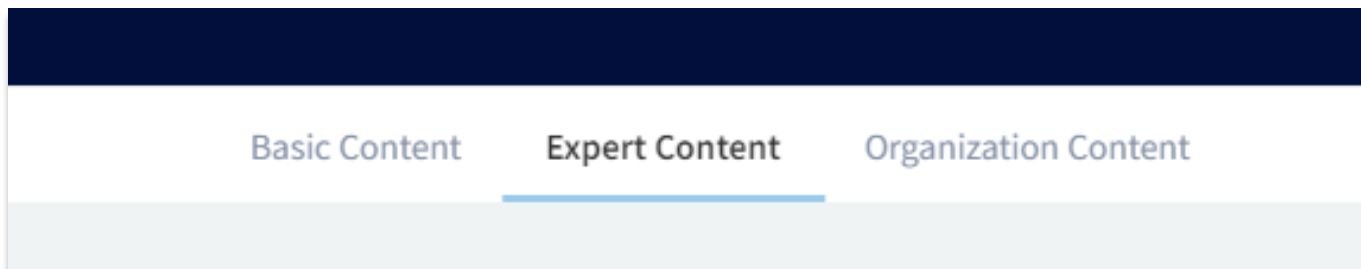
Deploying in Campaign Builder

1. The newsletter will now appear in your library to edit in the new Email Builder.

2. Our best practice is to create an initial campaign for each newsletter type (Weekly Expert Update, Monthly Elevate, and Wealth). Set up the Audience and Senders, then copy this campaign updating the content for the following campaigns.

3. To set up the Audience identify the criteria for who you'd like to receive the newsletter, and create this group.

4. To set up the Senders, our best practice is to utilize Teams. Organize users of newsletters into a Team or Teams for multiple types of newsletters, or toggle for all users if there are no limits to which users have access.

5. Update content after copying the campaign by searching and adding the newsletter template in the Expert Content Template Gallery.

6. Be sure to hit Run after scheduling your campaign.