



# Updating Email Disclaimers

## Table of Contents

- Overview.....1
- Adding and Removing Disclaimers.....1
  - Adding Disclaimers .....1
    - New Email Template .....1
    - Existing Email Template .....3
  - Removing Disclaimers.....3
- Creating a Disclaimer to Use.....3

## Overview

You can update the disclaimers in Total Expert email blocks in the email builder without needing to write or modify any HTML code. This allows you to respond quickly when an updated version is needed to keep communications flowing while ensuring compliance is maintained.

## Adding and Removing Disclaimers

An email block that references a disclaimer is set up to display the organization’s standard email disclaimer by default. You can specify additional disclaimers saved by your organization to either replace or add to the standard disclaimer. If the specified disclaimers are added to the standard disclaimer, the standard disclaimer’s text is shown first, followed by the text of the other disclaimers in the order they were selected.

You can also easily remove any disclaimers that have been added to a block.

## Adding Disclaimers

### *New Email Template*

1. Navigate to **Email Marketing → Emails**.
2. Create a new email template in the email builder.
  - a. Click the **Create Email** button at the top of the page.
  - b. In the Template Gallery, click the **Select** button on any graphic template in the Basic Content, Expert Content, or Organization Content tab.

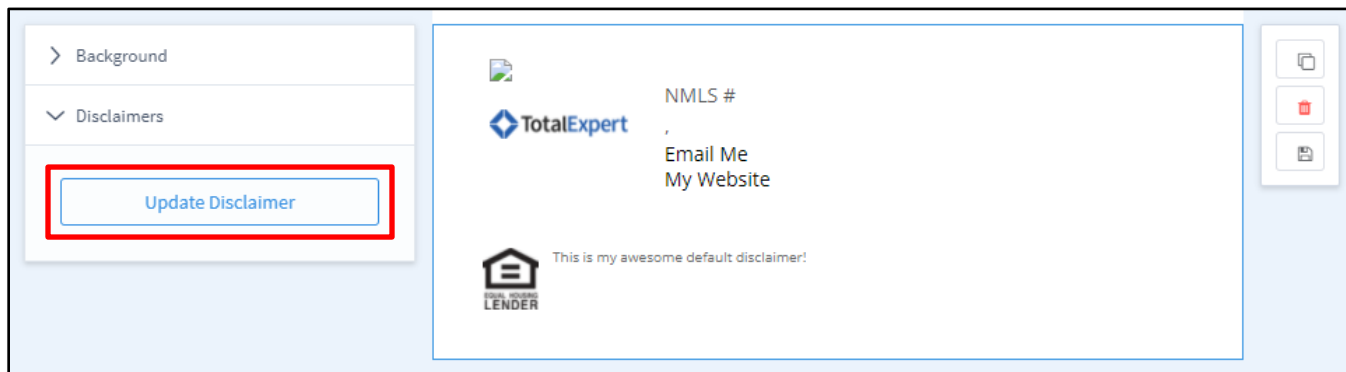
### **Note**

Do not use a blank Simple Text or Paste in code template (or one based on either of these), as this opens a version of the email builder that does not allow adding blocks.

- c. In the Create Email box:
  - i. Enter a name for the new email template in the **Name** field.



- ii. Click the **Confirm and Save** button.
3. Click the **Blocks** tab on the left side of the page.
4. Drag any saved block that includes a disclaimer (typically a footer) into the email template. The organization's default email template is shown in the block.
5. Click anywhere on the block.
6. The options for that block appear. In the menu to the left of the block, expand the Disclaimers section if it is not expanded by default.
7. Click the **Update Disclaimer** button.



8. In the Update Disclaimer box:
  - a. Click the **Select Disclaimer** field and select the desired disclaimer(s) from the drop-down list. Selected disclaimers are indicated by a checkmark in the list and by the name being added to the field above the list. A preview of the text of the selected disclaimer(s) is shown in the space to the right.

### Note

Disclaimers are strung together in the order you select them.

- b. In the **Replace Disclaimer** box:
  - i. Unchecked – The selected disclaimer(s) are appended to the standard disclaimer already shown in the block.
  - ii. Checked – The selected disclaimer(s) replace the standard disclaimer.
- c. Click the **Update Disclaimer** button to apply the changes.





The preview of the block updates to show the disclaimers you selected. The default disclaimer is either retained or omitted, depending on whether or not you checked the Replace Disclaimer box.

**Tip**

Save the email template to avoid losing your changes.

**Note**

In the event that your email template has more than one block with disclaimers, the view in the email builder only updates the block you initially selected. However, your most recent selection applies to all instances where disclaimers are called in the email template. This is shown if you enter preview mode; all blocks display the same set of disclaimers.

*Existing Email Template*

To modify an existing email template, navigate to the email list and select **Actions → Edit** for the template you want to open. If the template already includes a block with a disclaimer, simply make changes using the instructions above, beginning with step 5.

## Removing Disclaimers

To remove a disclaimer that has been added by the above method, simply reopen the Update Disclaimer box, remove the disclaimer from the Select Disclaimer field (click the **X** to the right of its name or or uncheck it in the drop-down list), and click the **Update Disclaimers** button.

If you remove all the disclaimers, the default disclaimer will be shown when the block is refreshed.

## Creating a Disclaimer to Use

Administrators can create additional disclaimers that can be inserted into email templates.

1. Navigate to **Manage Marketing → Disclaimers**. The page shows a list of existing disclaimers.
2. Click the **+Create** button in the upper-left corner of the page. A slide-out panel opens on the right side of the page.
3. Enter a recognizable name in the **Disclaimer Name** field.

**Warning**

The name must not include any spaces. A disclaimer with spaces in the name will appear in your list in the Update Disclaimer box, but will not be recognized by the code used in the email block. Use underscores or another consistent naming method instead.

4. Enter the text of the disclaimer in the **Disclaimer Description** field.
5. In the **Disclaimer Type** field, select **Email Disclaimer** from the drop-down list.
6. Click the **Submit** button at the top of the panel.

