Admin Onboarding: Managing Users and Teams

Users and teams provide your organization with access to the features, functionality, and content in the Total Expert platform. This guide outlines how to manage users and teams, and how permissions and roles are involved.

Permissions → User Roles → Users → Teams

Permissions

Permissions are used to allow or restrict access to features and functionality in the platform. They are assigned to user roles.

Access

Depending on the feature, new permissions created by Total Expert may be automatically added to your organization, or you may have to request them from Total Expert.

When permissions have been added to your organization, you can add them to a role as follows:

1. Log in to your Super Admin account.
2. Navigate to **Organization Admin → User Roles**.
3. Check the box for the user role you want to add the permission to.
4. Click the **Update Selected** button (pencil icon) at the top of the page.
5. In the slide-out panel:
    a. Check the **Grant Access** box for the permission(s) you want to add to the selected role.
    b. Click the **Submit** button at the top of the panel.

You can remove permissions from a user role by following the same steps, except you would uncheck the Grant Access boxes for the permissions.

Warning
Only add or remove permissions if you are certain of the effects. Some permissions control multiple related features in separate parts of the platform.

Key Considerations

Reach out to Total Expert if you have any questions or concerns about permissions before you make any adjustments.

Accessing the Super Admin account and user roles should only be done by a qualified person in your organization.

Certain permissions may be restricted to certain types of user roles, such as marketing administrators.

Links to Training Resources

https://totalexpert.freshdesk.com/support/solutions/articles/22000279749-permission-recommendations-mortgage-industry-users

https://totalexpert.freshdesk.com/support/solutions/articles/22000279750-permission-recommendations-banking-industry-users

User Roles

User roles are assigned to individual users, depending on the type of job they do and the specific level of access to features and functionality they should have in the platform.

Access

You can manage the user roles for in your organization as follows:

1. Log in to your Super Admin account.
2. Navigate to **Organization Admin → User Roles**.
3. On the User Roles page, existing roles are listed. You can:
    a. Create a new user role – Click the **+Add Role** button.
    b. Modify an existing user role – Check the box for the user role you want to modify and click the **Update Selected** button.
    c. Make a copy of an existing user role – Check the box for the user role you want to copy and click the **Copy Role** button.
    d. Delete an existing user role – Check the box for the user role you want to delete and click the **Delete Selected** button.

Key Considerations

Tip
When creating a new user role, Total Expert does not recommend starting from scratch. Instead, copy an existing user role and adjust it as needed.

Link to Training Resource

https://totalexpert.freshdesk.com/support/solutions/articles/22000284925-managing-users

Users

A user is an individual account with a unique email address and password for the Total Expert platform. These are typically for individual people, but they can also be shared accounts such as for marketing administrators or a compliance team.

Access

You can manage users in your organization as follows:

1. Log in to an admin-level role with access to the Users page.
2. Navigate to **Organization Admin → Users**.
3. On the Users page, existing users are listed. You can:
    a. Create a new user – Click the **+Add User** button.
    b. Modify an existing user – Check the box for the user you want to modify and click the **Edit Selected Users** button. You can edit more than 1 user at a time.
    c. Toggle a user's access on or off – In the **Status** column, click the toggle switch to either **active** or **inactive**. (You may need to scroll to the right to see this column.)

Key Considerations

Each user must have a unique email address and password associated with it. No other user can have the same email address.

Each user will have a user role assigned to it, giving that user permission to access specific features in the platform.

Links to Training Resources

https://totalexpert.freshdesk.com/support/solutions/articles/22000284926-new-user-creation-checklist

https://totalexpert.freshdesk.com/support/solutions/articles/22000284925-managing-users

Teams

Teams in Total Expert are used for 2 main purposes:

- Organizing users to manage access to print content, emails, and journeys.
- Allowing loan officer assistants, branch managers, and other support users to log in on behalf of the users they work with.

Access

You can manage teams in your organization as follows:

1. Log in to an admin-level role with access to the Teams page.
2. Navigate to **Organization Admin → Teams**.
3. On the Teams page, existing teams are listed. You can:
    a. Create a new team – Click the **+Add Team** button.
    b. Modify an existing team – Select **Actions → Edit** for the team you want to modify. This includes:
        i. Adding or removing users from the team.
        ii. Granting manager status to 1 or more users on the team, which allows those users to log in on behalf of other users on that team.
    c. Other actions – Click the **Actions** drop-down menu. The available options depend on your user role's permissions, but include such things as Manage Users and Delete.

Key Considerations

Anyone designated as a manager on a team, such as a loan officer assistant or branch manager, has access to other team members' accounts to manage tasks, send emails, access print and web marketing, and more on their behalf.

Common use cases for teams are:

- multiple branches
- sales regions
- geographical locations
- loan officer/loan officer assistant combinations.

Links to Training Resources

https://totalexpert.freshdesk.com/support/solutions/articles/22000279641-teams

https://totalexpert.freshdesk.com/support/solutions/articles/22000279092-assign-users-to-a-team-simulation

https://totalexpert.freshdesk.com/support/solutions/articles/22000279093-removing-users-from-a-team-simulation

https://totalexpert.freshdesk.com/support/solutions/articles/22000280377-admin-101-users-and-teams

Data Importer

The data importer tool allows you to add an entire batch of data (contacts, loans, users, products, or recruiting data) to the Total Expert platform in a single bulk action. You can import data for 1 user or multiple users at a time.

Access

You can manage data imports for your organization as follows:

1. Log in to an admin-level role with access to the Data Imports page.
2. Select **Import Data** from the navigation menu.

Key Considerations

The importer accepts .csv files.

Tip
For best results, use the Data Importer templates, which are available on the right side of the Data Imports page.

Link to Training Resource

https://totalexpert.freshdesk.com/support/solutions/articles/22000279650-using-the-data-importer

Approval Flows

An approval flow specifies one or more users who must explicitly approve a requested print piece or email before it can be printed or sent.

Approval flows are an important compliance feature in Total Expert.

Access

You can manage approval flows for your organization as follows:

1. Log in to an admin-level role with access to the Approval Flows page.
2. Navigate to **Manage Marketing → Approval Flows**.

Key Considerations

Common use cases for approval flows are to manage how editable print flyers and emails are approved.

Approval flows can be set up to require 1 or more users to explicitly approve the content.

Tip
Leverage a shared user account, like a marketing administrator or a compliance user, to accept or reject requests. This will ensure that if an individual is out of office or unable to access Total Expert, someone else will be able to access the shared account to manage approvals.

Link to Training Resource

https://totalexpert.freshdesk.com/support/solutions/articles/22000279627-approval-flows