MAXA Fields Guide

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Introduction

This document is intended to be used as a reference for the various fields available to users in MAXA. The descriptions should be helpful for any administrator who is configuring their instance of MAXA.

Designs

Field Name	Field Type	Description
Title*	Text field	Display name of the design.
Design Type*	Drop-down	Type can indicate format, size, and distribution method. Examples: email signature, brochure, business card, 8.5 x 11 flyer
User	Drop-down	The creator of the design or the selected owner of the design.
Is Template	Checkbox	Indicates that a design will be cloneable and edits will be made to the duplicate.
Archived	Checkbox	Indicates that a design is archived and will not be accessible on the user dashboard.
Suspended	Checkbox	Indicates that a design is suspended. Suspending allows for administrators to temporarily inactive designs for the purpose of making changes ahead of re-releasing.

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Field Name	Field Type	Description
Weight	Numeric field	Indicates the order that the design will appear in the dashboard. Example: Weight of 1 appears at the top of the category list. Weight of 100 will appear at the bottom of the category list. Note: MAXA defaults to alphabetical organization for items with the same weight. The default weight for a design is 50.
Requires Compliance	Checkbox	Indicates that a design will require administrator compliance approval prior to publishing and distribution (download, print, post to social) by an end user.
Mark as New	Drop-down	Selecting this option ataches a blue "new" indicator to new design templates for a specified period of time.
Caption Suggestion	Text field	Used for social media designs. Text in this field will populate as the default message attached to the design. This field is comparable to the social media message field in Total Expert. Note: Users are able to edit the text in this field when using the design.
Display All Users as Partners	Checkbox	Indicates that a design allows for internal users to be available for selection as co-marketing partners in co-branded designs.
Tags	Drop-down	Tags allow administrators to organize designs. Examples: First time Home buyer, holiday, refinance, USDA.
Categories	Checkbox	Organizational tool to provide access to designs. Examples: Presidents Club, Southwest Region, Top Producers, Letterhead, Business Cards. Note: Category names can mirror design types. See the Categories section in the platform for additional examples.

Categories

Categories are used to organize content in the user's dashboard.

Field Name	Field Type	Description
Categories > New Group > Name	Text field	Category groups are the top of the organizational structure. This field indicates the name of the field as it appears on the user dashboard. Example: Print, Digital, Admin Only
Categories > New Group > Position	Numeric field	Indicates the order that the category group will appear in the dashboard. A position of 1 appears at the top of the group list, and a position of 100 appears at the bottom of the group list. Note: MAXA defaults to alphabetical organization for items with the same position. The default position for a group is blank.
Title*	Text field	Display name of the category.
Description	Text field	This field does not display for end users. It can be leveraged as an administrator note for the category. Example: Business card category description is "3.5in x 2in".

Field Name	Field Type	Description
Position	Numeric field	Indicates the order that the category will appear in the dashboard. A position of 1 appears at the top of the category list, and a position of 100 appears at the bottom of the category list. Note: MAXA defaults to alphabetical organization for items with the same position. The default position for a category is 0.
Group	Drop-down	Groups organize categories. Examples: Digital and Print
Split Bill Percentage	Drop-down / Numeric field	Indicates the shares of the professional print cost shared between the user and parter. In Total Expert, this feature is referred to as a media markup or cost split. Default is no split or 100% covered by the user. Note: This setting will apply to all designs in the category.
Hidden	Checkbox	Removes the category from the dashboard view for all users regardless of user role.
Hidden From Regular Users	Checkbox	Removes the category from the dashboard view for regular users.
Hidden From Account Owners	Checkbox	Removes the category from the dashboard view for users with the role of Account Owners specifically
Requires Compliance	Checkbox	Indicates that any design added to this category will require administrator compliance approval.
Disable Create Button	Checkbox	Disables the Create Design button.
Download Now	Checkbox	Enables the Download Now button.
Download Now Description	Text field	The design loads the user's information and immediately downloads, bypassing the designer. Downloadable just means the design downloads as-is.
Content Type	Drop-down	Allows admins to choose whether the category supports Designs, Print Ready, or Downloadable options. Note: In order to publish a Downloadable asset, you need to have a category that is marked as a Downloadable content type.
Custom Redirect URL	Text field	The category becomes a link instead.
Block Category with Title	Text field	Category is blocked with a headline pop-up.
Block Templates with Title	Text field	Templates in the category are blocked with a headline pop-up.
Block Templates with Message	Text field	Templates are blocked with longer text than a headline.
Mark As New	Drop-down	Attaches a blue "new" indicator to the category for a specified period of time.
Show Concierge Request	Checkbox	Indicates that a user can request that the administrator create a design on their behalf. If this is enabled, a user is able to request completion of a design or a custom design. Any design in this category will show the Concierge Request button. Users can indicate needs via the available notes section.

Field Name	Field Type	Description
Concierge Request Only	Checkbox	Indicates that the user must submit a concierge request to access the design. The user cannot edit or publish the designs in these categories.
Concierge Request Design View Only	Checkbox	Indicates that the user can make a concierge request but not customize the design. Administrators still see the Create Design button.
Mobile Concierge Request Only	Checkbox	Concierge request is for mobile only.
Terms of Use	Text field	The disclaimer displayed before users are able to edit designs. All designs added to this category display this disclaimer.
View Only	Checkbox	Category is viewable only; users cannot open designs for editing.
Available To	Drop-down	When Managers is selected in the Users drop-down list, the category is visible to Account Managers, Managers, and Admins, but Users will not see this category. When Account Managers is selected in the Users drop-down list, the category is accessible to Account Managers and Admins only. Managers and Users will not be able to see this category.
Available on Mobile App	Checkbox	Indicates that the category is available when using the mobile app.
Available on Mobile Browser	Checkbox	Indicates that the category is available when using a mobile browser.
Limit to Selected User Groups	Checkbox	Indicates that a specific category should only be available to specified user groups, and would not be available for other groups.
Limit to Selected Offices	Checkbox	Indicates that a specific category should only be available to a specified office, and would not be available for all other offices.
Hide from Selected User Groups	Checkbox	Indicates that a specific category should not be available for users in a specific group, but would be available for all other user groups.
Hide from Selected Offices	Checkbox	Indicates that a specific category should not be available for users in a specific office, but would be available for all other offices.
Subcategories- add new subcategory-name	Text field	Adds a new subcategory, or “folder” in the category and defines the name of the new folder.
Subcategories- add new subcategory-position	Numeric field	Orders the new subcategory in the list of all other subcategories in this category. Note: MAXA defaults to alphabetical organization for items with the same position.

User and Partner Fields

These fields are available in the User and Partner profiles. Many of them are set as default but can be enabled as requested. Additionally, individual fields can be locked for editing or required, as requested. By default, the fields with a red asterisk (*) below are the only required fields and no fields are locked.

Field Name	Field Type	Description	Default User Field	Default Partner Field
Address 1	Text field	Used to capture the primary part of the user's street address.	Yes	No
Address 2	Text field	Used to capture additional address details such as apartment or floor.	Yes	No
Bio	Text field	The user's biography details that can be used in content as desired.	No	No
Branch License	Text field	The branch license number that the user belongs to.	No	No
Branch Location	Text field	The location of the branch the user belongs to.	No	No
Branch Name	Text field	The name of the branch the user belongs to.	No	Yes
Branch Number	Text field	The number of the branch the user belongs to.	No	No
Broker DRE	Text field	The license number for the user's brokerage as required by California DRE licensing that may differ from their NMLS number.	No	No
City	Text field	The city the user lives in.	Yes	No
Company Address	Text field	The address of the user's company.	No	Yes
Company License	Text field	The license of the user's company.	No	Yes
Company Name	Text field	The name of the user's company.	No	Yes
Company nmls	Text field	The NMLS number of the user's company.	No	Yes
Country	Text field	This field stores the country the user resides in. This must be filled out as "US" for the states to populate.	Yes	No
DBA Address	Text field	The address of the DBA a user belongs to.	No	Yes
Dba license number	Text field	The license number of the DBA a user belongs to.	No	Yes
Dba name	Text field	The name of the DBA a user belongs to.	No	Yes
Disclaimer	Text field	The entire disclaimer a user needs to populate every time they create a marketing piece.	No	No

Field Name	Field Type	Description	Default User Field	Default Partner Field
Dre number	Text field	The license number for the user as required by California DRE licensing that may differ from their NMLS number.	No	No
Email*	Text field	The user's email address.	Yes	Yes
Fax number	Text field	The user's fax number.	No	No
First name*	Text field	The user's first name.	Yes	Yes
Html disclaimer	Text field	The disclaimer for a user if it contains any HTML entities.	No	Yes
Instagram handle	Text field	The user's Instagram handle.	No	No
Last name*	Text field	The user's last name/surname.	Yes	Yes
License number	Text field	The user's license number.	Yes	Yes
License numbers	Text field	Stores multiple license numbers.	No	No
License in	Text field	Describes the locations/states where a user is licensed.	No	No
Licensed in states	Checkbox	Indicates the states a user is licensed in and directly relates to the state disclaimer drop-down list that appears on assets when required.	Yes	n/a
Lo nmls number	Text field	The Loan Officer's NMLS number.	No	No
Logo	Image URL / upload	The user's primary logo.	Yes	No
Market center name	Text field	Used when a customer wants to use "market center" as a text replace field option. This is typically tied to an SSO set up.	Yes	Yes
Mobile phone	Text field	The user's cell phone number.	Yes	Yes
Number 800	Text field	The user's 1-800 phone number.	No	No
Office logo	Image URL / upload	The user's office logo.	Yes	Yes
Office phone	Text field	The user's office phone number.	Yes	Yes
Photo	Image URL / upload	The user's headshot.	Yes	Yes
Primary brand color	RGB / Hex color	The user's primary branding color as required by the brand guidelines.	Yes	No
Secondary brand color	RGB / Hex color	The user's secondary branding color as required by the brand guidelines.	Yes	No
State	Text field	The name of the state the user lives in.	Yes	No
State license number	Text field	The user's state license number.	No	No
Suite and floor	Text field	Additional address information for the user; interchangeable with Address 2.	No	No
Tagline	Text field	A tagline or slogan.	No	No

Field Name	Field Type	Description	Default User Field	Default Partner Field
Title	Text field	The user's job title.	Yes	Yes
Website	Text field	The user's website.	Yes	Yes
Zipcode	Text field	The user's ZIP code.	Yes	No
Invite Limit	Numeric field	If a user is a manager, this field indicates the number of invitations they can issue for new users.	Yes	n/a
Don't Save tutorial progress	Checkbox	If checked, this field resets all tutorial progress every time a user logs in.	Yes	n/a
Disallow creating partners	Checkbox	If checked, this field prevents a user from creating co-marketing partners.	Yes	n/a
Only SSO login	Checkbox	If checked, this forces specific users to log in with SSO only.	Yes	n/a
Dark mode	Checkbox	If checked, this enables the dark mode preference for the user.	Yes	n/a
Language	Drop-down	Sets the language for the user in the platform. Limited to English, Spanish, or French.	Yes	n/a
Cost Center	Text field	The user's cost center number, which is usually associated with billing.	Yes	n/a
External User	Text field	The external user ID if the ID is something other than an email address.	Yes	n/a
Email subscription	Checkbox	The email used to send our welcome email tutorial series.	Yes	n/a
Manager	Drop-down	Assigns the user's manager.	Yes	n/a
Offices	Drop-down	Assigns the user's office(s). A user can exist in multiple offices.	Yes	n/a
Managed Offices	Drop-down	Assigns offices that the user manages. They must have a manager role, and they must be a member of the office they manage.	Yes	n/a
Don't update offices with SSO	Checkbox	Designates that the user's offices should not be updated when they sign in with SSO.	Yes	n/a
Groups	Drop-down	Designates the groups a user is part of. Groups can be added in this menu or in the User Groups section of the platform.	Yes	n/a
Print Vendor	Drop-down	Designates the print vendor for the customer. Only available for custom printers.	Yes	n/a

Field Name	Field Type	Description	Default User Field	Default Partner Field
Password*	Text field	Can be used to set a new password for a user. The password is masked as it is entered. This field does not display their current password.	Yes	n/a
Apply Hidden Categories to team	Checkbox	In connection with the hidden categories section, this checkbox designates that a manager's team does not have access to the hidden categories.	Yes	n/a
Hidden Categories	Checkbox	Designates categories that are hidden from the user so they cannot access them.	Yes	n/a

Note
Custom fields, such as for QR codes, can be configured upon request.

User Roles

Role: Manager

Permission	Description
Office concierge request manager	These users have an administrator interface with the concierge section, where managers can view concierge requests submitted by users who are members of the same office. They have access to create designs from concierge requests.
Office compliance manager	These users have an administrator interface with the compliance section, where managers can view compliance requests submitted only by users who are members of the same office. They can approve or reject designs. They can modify a design submitted for compliance, but only with a loss of compliance progress. To modify a design without losing compliance progress, the account must have the **Office Compliance Manager bypass compliance** feature flag enabled.

Role: Regular User

Permission	Description
Concierge Admin	These users have an administrator interface with the concierge section, where they can view concierge requests submitted by any user of the account, regardless of office membership. They have access to create designs from concierge requests.
Compliance Admin	These users have an administrator interface with the compliance section, where they can view compliance requests submitted by any user of the account, regardless of office membership. They can approve or reject designs.

Permission	Description

Print Admin	These users have an administrator interface with the following sections:
	• Switch Account
	• Users
	• Print Settings
	  ○ In this section, **Print Shop Orders** displays all print orders from all accounts, not just the account to which the Print Admin belongs. Information from all accounts is shown in sections like Printable Design Types, Print Config, Print Vendors, Print Promo Codes, and Shipping Options.
	• Swag Shop
	• Designs
	If the account has the Local Print feature flag enabled, the Print Admin only has an administrator interface with the following sections:
	• Users
	• Print Settings
	  ○ This section only shows print orders from the specific account the Print Admin belongs to. However, Printable Design Types, Print Config, Print Vendors, Print Promo Codes, and Shipping Options still display information from all accounts.
	• Swag Shop
	• Designs

Partner-Specific Fields

Field Name	Field Type	Description	Default User Field
Assigned to	Drop-down	Determines whether a partner is connected to a single user, all users assigned to a specific office, or all platform users.	Yes
Assigned to (User/Office)	Drop-down	Determined by the "Assigned to" setting. If a partner	Yes

Offices

Offices can be used to organize users.

Field Name	Field Type	Description
Title*	Text field	The name of the office.
Logo	Image upload	The assigned logo for the office. If the logo does not differ from the corporate logo, this is not required.
Disclaimer	Text field	This should be used if the office has a specific disclaimer that is not required for all users.

Field Name	Field Type	Description
Cost Center	Text field	The assigned call center for the office, which is often used for billing purposes.
Concierge email	Text field	This email address is used for concierge requests that are routed through the office and not the corporate concierge.

Note
Custom fields can be added upon request. Examples include additional logos or accolade images.

User Groups

User groups are used to organize users. After assigning users to a group, administrators can assign groups to categories and individual designs for quick content distribution.

Field Name	Field Type	Description
Title*	Text field	The name of the user group as it appears on the platform.
Description	Text field	This should be used to quickly understand how the group functions or who is in the group. Example: President's Club, Southwest Region, Mortgage One DBA.
Available on signup	Checkbox	Reserved for users who are created not through registration, but through integration with other services.
Signup order	Numeric field	Denotes the order of the user group list in the user invite when users sign up via invite.
SSO resistant	Checkbox	Use this field to avoid unassigning people from a group when they sign in via SSO or API.
Account Fonts	Checkbox	This area should be used to assign brand-specific fonts to a user group or assigning all brand fonts to the user group. Leaving fonts unchecked limits the fonts available for end users to use in the designer.