



MAXA Getting Started Guide

How to Use This Guide

This guide outlines first steps for administrator users new to the MAXA platform. It is written primarily for new administrators that are configuring the MAXA setup for their organization.

Business Decisions to Consider As You Begin

- What custom designs are your priority?
 - Choose about 18 pieces, including 10 print pieces, 2–3 postcards, and 5 social media posts.
- What design types or specific designs will require compliance approval?
- How do you want to organize users?

Step-By-Step

Step 1: Log In

- Log in via the Marketing Admin user in Total Expert for Integrated Design Studio implementations.
- Log in as a MAXA administrator user for standalone MAXA implementations.
- Click the user name in the upper-right corner and click **Admin** to navigate to the Admin panel.

Step 2: Review Designs

- In the Admin panel, click the **Designs** drop-down menu at the top of the page, then select **Designs** to review all available MAXA-created templates.
- For the designs you want to deploy for launch, you will need to ensure field mapping in signature lines and other parts of the design are mapped to the correct user, partner, property, or loan product field(s).
- Determine which aspects of each design you want to make editable and which will be locked down to end users.

Tip

Total Expert recommends creating co-branded versions of all applicable designs.

Step 3: Controlling Mass Availability of Content

- Hide design types you will not want to use for any users at launch.
- Hide categories you will not want to use for any users at launch.

Tip

Commonly hidden design types are email signatures, large brochures, and business cards.

Step 4: Managing Users

- Assign user roles/permissions.
- Assign users to groups and/or offices.
- Assign manager roles and assign users to the correct manager.