



New User Creation Checklist

- Create a new user account in Total Expert. Ensure that all demographic information, licenses, and disclaimers are correct.
 - Add state licenses to the disclaimers tab.
 - If you need to add more than 10 users at once, consider having Total Expert import these users rather than manually adding them.
- Add the new user to the appropriate team(s).
 - Designate them as a manager of the appropriate team(s).
- If connected to a loan origination system (LOS), enter the user's External ID in Account Settings and have the user add it to their LOS account. If you need to import historical data from the LOS, notify Total Expert.
- Submit spreadsheets for the new user's current contacts and loans to your data contact or customer support at Total Expert to have the data imported into the database.
- Ensure that the new user has access to the correct marketing materials. If you are not using the "Grant New User Access" feature, grant the new user access to the following:
 - Emails (**Email Marketing → Emails**, then for each email template, select either **Actions → User Settings** or **Actions → Team Settings**)
 - Drip campaigns (**Campaigns → Drip Campaigns**, then for each campaign, check the box and click **User Settings**)
 - Auto campaigns (**Manage Marketing → Auto Campaigns**, then for each campaign, select **Actions → User Settings**)
 - Marketing Templates, including print and social media (**Manage Marketing → Manage Templates**, then for each piece, select either **Actions → User Settings** or **Actions → Team Settings**)
- If you are using In-Process, Post Close or other auto campaigns that are company-mandated or automatically opted in, notify Total Expert of the new users and appropriate contact groups to have them added to each campaign.
- Provide the new user with their Total Expert user name and password.
- Provide the new user with Total Expert onboarding, support, and other training materials.
- Have the new user send out initial promotional material (email, print, and social media).
 - For example, "I've Moved!"