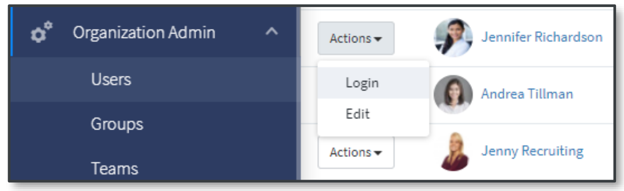
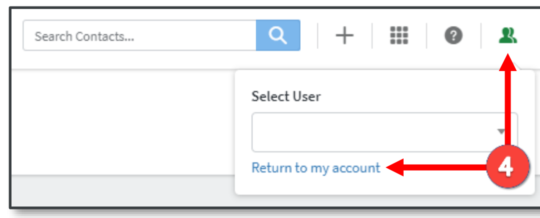
New User Reference Sheet

Acting on Behalf of Another User

A user with appropriate permissions can log in and perform tasks on behalf of another user. For example, a loan officer assistant might log in to their LO's account to set up email templates.



1. Navigate to **Organization Admin → Users**.
2. For the user you want to log in as, select **Actions → Login**.
3. Perform any actions on behalf of this user.
4. To return to your own account, click the **Switch Account** button in the header of any page and click **Return to my account**.

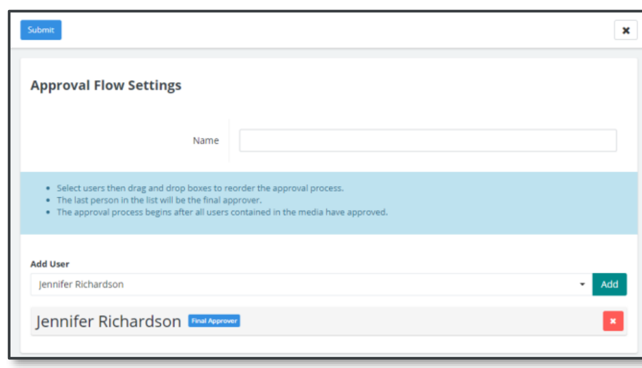


Approval Flows

An approval flow can be assigned to email messages or print marketing materials. It requires that one or more Total Expert users review and approve the item before it can be sent out.

To create an approval flow:

1. Navigate to **Manage Marketing → Approval Flows**.
2. Click the **+Create** button at the top of the page.
    a. Enter a name in the **Name** field.
    b. In the **Add User** drop-down menu, select a user who will have to approve the items assigned this approval flow.
    c. Click the **Add** button.
    d. If multiple users must approve, repeat b and c above for each approver.
    e. Drag and drop the approvers in the order they must approve the item. The user listed last is designated as the Final Approver and has the last opportunity to approve or reject the item.
    f. Remove an approver by clicking the X to the right of their name.
    g. Click the **Submit** button at the top of the page.

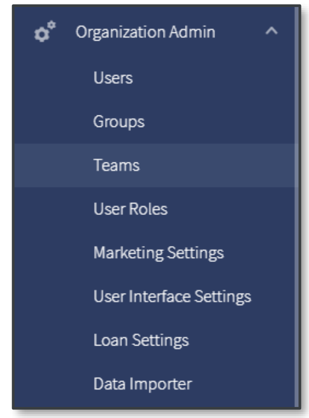


To edit an existing approval flow:

1. Navigate to **Manage Marketing → Approval Flows**.
2. Check the box for the approval flow you want to edit.
3. Click the **Update Selected** button at the top of the page.
4. Follow steps 2a–g above.

TOTAL EXPERT

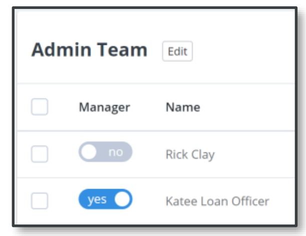
Creating/Editing a Team



Teams are used to assign content to appropriate users in your organization. Users marked as managers of a team can assign tasks to other members of the team.

To create a new team:

1. Navigate to **Organization Admin → Teams**.
2. Click the **+Add Team** button at the top of the page.
3. In the dialog box, enter a team name and click **Save Team**.
4. On the team details page, click the **Add Users** button at the top of the page.
    a. Check the boxes for any users you want to add to the team.
    b. Click the **Add Users** button in the lower-right corner.
5. By default, users are added to teams as non-managers. Click the toggle in the **Manager** column for any users who should have manager control of the team.



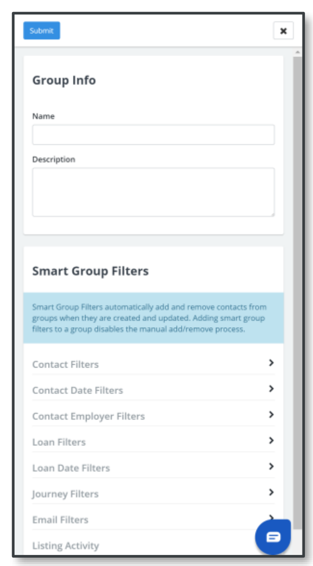
To edit the users in an existing team:

1. Navigate to **Organization Admin → Teams**.
2. For the team you want to edit, click the team's name or select **Actions → Edit**.
3. Follow steps 4 and 5 above.

Contact Groups

There are two types of contact groups: standard groups and smart groups. You must manually add contacts to standard groups, but contacts are automatically added to and removed from smart groups according to specified criteria. Auto campaigns must be associated with smart groups.

To create a new contact group:



1. Navigate to **Leads & Contacts → Groups**.
2. Click the **+Create** button at the top of the page.
3. Fill in the Name and Description fields.
    a. For a standard group, do *not* fill in any Smart Group Filters fields. If any fields are filled, the group automatically becomes a smart group.
    b. For a smart group, fill in any Smart Group Filters fields that should determine which contacts are in the group.
4. Click the **Submit** button at the top of the page.

To assign contacts to a standard group:

1. Navigate to **Leads & Contacts → Contacts**.
2. Check the boxes for any contacts to be added.
3. Select **Actions → Set Groups**.
    a. Select **Add Groups**.
    b. Check the boxes for any groups you want to add the selected contacts to.
    c. Click the **Submit** button at the top of the page.