



Setting Team Priority

In the Total Expert platform, when you create journeys and templates for email, print, and social media marketing, you can assign access to these items to other users in your organization. You can assign access at the organization, team, or user level.

- Organization – Allows all users in the organization to access the item.
- Team – Allows all users in selected teams to access the item.
- User – Allows all selected users to access the item.

At each level, access can be added, denied, or neither (cleared). When you initially create an item, these settings are neither added nor denied. When set, team settings take precedence over organization settings, while user settings take precedence over both. If the item is neither allowed nor denied to a given user, then their team settings apply. If the user's teams are also neither allowed nor denied, then the organization setting applies.

For example, if access is denied to the whole organization and a user's teams, but that user is allowed access at the user level, then that user has access because the user access setting takes priority. Likewise, if either the organization or a user's teams have access, but that specific user is denied access, then that user will not have access.

In addition, a user may belong to more than 1 team. In the case where a user belongs to multiple teams with conflicting team settings, their access to the item is determined by the *team priority* setting. The user's team setting is determined by the highest priority team to which they belong.

To set team priorities:

1. Navigate to the page where your item is listed.
 - a. For journeys: **Journeys**
 - b. For email templates: **Email Marketing → Emails**
 - c. For print and social media templates: **Manage Marketing → Manage Templates**
2. Locate the item you want to work with and select **Actions → Team Settings**.
3. Click the **Set Team Priority** button in the upper-left corner of the page.
4. A Team Priority slide-out panel opens. In this panel, the teams that have been assigned access to the item are listed.

Note

This assumes that some teams have already been assigned access. If not, the list in the panel is blank.

In this case, close the panel, select the checkbox for a relevant team, and click the **Change Settings** (pencil icon) button). In the slide-out panel, select **Add Access** (and any other relevant settings), then click the **Submit** button. Repeat this with the appropriate settings for each team, then return to the Team Priority panel.

Drag and drop the team names in the list into the order you prefer. The settings for the listed teams will be prioritized in the order the teams appear, with the settings for the team at the top given highest priority.

5. Click the **Submit** button.



The screenshot shows two panels from the TotalExpert interface. The left panel, titled "Team Settings: 2024-01-19 settings test", contains a table with the following data:

Team Name	Allow Access	Allow Template	Allow Publish
test team 2	✓	✓	✓
test team 1	✓	✓	✓

The right panel, titled "Team Priority", contains a list of teams with a priority order indicator. The indicator shows "test team 1" above "test team 2", with a red double-headed arrow between them. A blue banner at the top of the panel reads: "Highest priority teams should be placed at the top, lowest priority at the bottom."

While the Team Settings page does indicate which teams have access (and the various access settings), it does not indicate the priority order of teams with access. You would have to open the Team Priority panel again to review this.

Tip

Remember that user settings take precedence over team settings. If any user access settings have been applied to a user, then all team (and organization) access settings, including team priority, for the same item are ignored.