



Teams

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Introduction

As a marketing administrator you can organize your users by creating teams and defining who will be a team manager.

Use teams for cases such as multiple branches, sales regions, geographical locations, or loan officer/loan officer assistant combinations. Anyone designated as a manager on a team, such as a loan officer assistant or branch manager, has access to other team members' accounts to run reports, send email, content, social materials and more on their behalf. Use teams to distribute varying versions of content.

Tip

Create an All Users team as an easy method to distribute marketing materials.

Select **Manage Teams** from the navigation menu to see a page with a list of teams that you are currently a manager of. You have several options under the Actions menu for each team.

Note

Depending on your organization's setup, some of the options described below may not be available.

Manage Users

The Manage Users option allows you to see a list of members in your team and log in to their accounts.

1. Locate the appropriate team and select **Actions → Manage Users**.
2. Locate the appropriate team member and select **Actions → Login**.



The screenshot shows the Total Expert dashboard. The top right corner features a user profile dropdown menu for 'Katie', which is highlighted with a red box. The dashboard includes several key metrics: 0 New Contacts (past 24 hours), 1 Birthdays (this week), \$11.5m Loan Pipeline, 0 Expiring Pre-Approvals (next 30 days), 6 Open Tasks, 2 Emails Opened (past 24 hours), \$0.00 Closed Loan Volume (YTD), and 1 Co-Marketing Partners. Below these are sections for 'Loan Volume (Funded Date)' (No Data Available) and 'Recent Activity (Last 30 days)' listing several email events.

Manage Print Orders

The Manage Print Orders option allows you to see all print orders placed by members of your team. You can see who placed the order, their co-marketing partner for the order (if applicable), media name, order date, status, and cost.

1. Locate the appropriate team and select **Actions** → **View Report** to see a more detailed report of a specific order.

The screenshot shows the 'Print' order details page. The page is framed with a red border. It includes an 'Order Details' section with the following information: Total Expert Order ID (52832), Status (Order Declined), Order Created Date (February 12, 2019), Submitted to Printer Date, Files, Created By (Katie Phillips), Company (First Superior Expert Mortgage), Product Code (18807), Order Quantity (1727), Delivery Service (USPS EDM™), Distribution area (See details), and Distribution period (February 2019). Below this is a 'Payment Details' section showing a Total Price of \$1,072.13, with a note that Jared White canceled \$964.92 and Katie Phillips declined to pay \$107.21. The 'Approved By' field is empty. The main content area features a 'JUST SOLD' real estate advertisement for 11086 Holland Circle, Eden Prairie, MN 55347. At the bottom, there is contact information for Katie Phillips, Loan Officer, including her phone number (952.335.6895), cell number (763.555.2362), email (kphillips@thefirst.com), and website (www.thefirst.com). A 'Thank You!' message is also present.



Manage Single Property Sites

The Manage Single Property Sites option shows all single property sites created by team members. You can view the name, a link to the site, listing ID, template used, creation date and time, the creator of the site, and their co-marketing partner on the site (if applicable).

1. Locate the appropriate team and select **Actions → Manage Single Property Sites**.

| Name | Link | Listing ID | Template | Created | Creator |
|---------------------------|---|------------|------------|---------------------|--------------------------------|
| 10606 Sonoma Ridge | http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-553mngg/hvbw47 | 5026834 | Cavallo | 08/16/2019 1:10 pm | Katie Phillips Loan Officer |
| 10606 Sonoma Ridge | http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-553mngg/hvbw47 | 5026834 | Cavallo | 09/19/2019 10:21 am | Katie Phillips Loan Officer |
| 10606 Sonoma Ridge | http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347333 | 5026834 | Stylish | 10/25/2019 9:56 am | Katie Phillips Loan Officer |
| 10606 Sonoma Ridge | http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347444 | 5026834 | Modern | 10/25/2019 1:43 pm | Katie Phillips Loan Officer |
| 123 Main Street - 6/24/20 | http://sites.totalexpert.net/123-main-street-62420-241062 | | Open House | 06/24/2020 10:05 am | Katie Phillips Loan Officer |
| 1331 North Arm Drive | http://sites.totalexpert.net/1331-north-arm-drive-orono-mn-5536455 | 5264725 | Modern | 10/23/2019 10:20 am | Katie Phillips Loan Officer |

Loan Overview

The Loan Overview option allows you to view a quick overview of your team members' loan volume.

1. Locate the appropriate team and select **Actions → Loan Overview**.
2. On the Overview page, click a team member's name to view their loans in more detail.



Team Users

100 ▾

| Rank | Name | Volume | Loan Count |
|------|----------------------------|--------------|------------|
| 1 | Katie Phillips | \$54,689,308 | 186 |
| 2 | Daniel Thomas | \$1,180,000 | 4 |
| 3 | Luke Wieneke | \$0 | 0 |
| 4 | Marketing Admin | \$0 | 0 |
| 5 | Ryan Johnson | \$0 | 0 |
| 6 | Training Demo Loan Officer | \$0 | 0 |

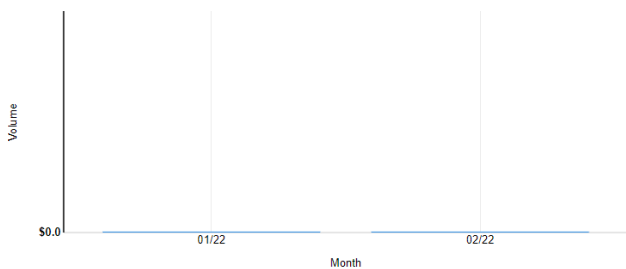
Showing 1 to 6 of 6 entries Previous **1** Next

Katie Phillips
Loan Officer

Rank
1
Loans Closed
186

Total Volume
\$54,689,308
Catch the Leader
\$0

Volume (Year To Date)



Loan Status

Finished Funded Processing



Loan Types

ARM Conventional FHA VA

