



# Teams

## Table of Contents

Introduction .....	1
Sharing Content with Team Members.....	1
Journeys .....	2
Print and Social Media Content .....	2
From the Template List .....	2
From the Template Editor.....	3
Emails .....	3
From the Email List .....	3
From the Email Editor .....	3
Managing a Team.....	4
Manage Users .....	4
Manage Print Orders .....	5
Manage Single Property Sites.....	6
Manage Directory Listings.....	6
Loan Overview.....	7

## Introduction

As a marketing administrator, you can organize your users into teams. Teams in Total Expert can represent any combination of users that share some characteristic, such as people who work in specific branches or combinations of loan officers and loan officer assistants.

As part of the setup of a team in Total Expert, you can designate 1 or more members to be the manager(s) of that team. A team manager has access to log in on behalf of the other team members to run reports, send emails, prepare print and social media materials, and more. For example, an administrator should create a team for each loan officer/loan officer assistant pair where the loan officer assistant is designated as a manager.

Teams are also the recommended method of sharing content and templates with users.

## Sharing Content with Team Members

The easiest way to share content with appropriate users in your organization is to set up teams that represent logical groupings of users, such as by geographic areas or specific branches of your organization. Then you can share things with all the users in a team at once. Users added to a team later automatically gain access to the materials that were previously shared with that team.



Access can also be given to the whole organization or to individual users. Giving access to a team takes precedence over an organization-level setting, but user-level settings take precedence over team-level settings. That is, if access to something is not explicitly allowed or denied for a given user, their access is determined by their team settings. If no team settings apply, then their access is determined by the organization setting.

## Journeys

Sharing a journey allows any user with access to have their appropriate contacts automatically triggered onto that journey. Users might also be able to manually trigger their contacts onto a journey they have access to, depending on the journey's settings.

The following instructions assume that you have built and tested a journey, and you are ready to share it with users via their teams.

1. Select **Journeys** in the navigation menu.
2. On the Journeys page, locate the journey you want to share and select **Actions → Team Settings**.
3. On the Team Settings page:
  - a. Check the boxes on the left side for any teams you want to share access with. You can select as many teams as you want.
  - b. Click the **Change Settings** button (pencil icon) at the top of the page.
  - c. In the slide-out panel:
    - i. Ensure that the **Add Access** option is selected.
    - ii. (optional) In the Journey Settings section, check the boxes for any other options that should apply to this journey for the selected teams.
    - iii. Click the **Submit** button.

## Print and Social Media Content

Sharing a print template allows any user with access to use that template to begin a print order. Whether the user can customize the template before printing it is determined by the settings of the individual template. Sharing a social media template allows any user with access to post that item to their integrated social media platforms.

There are 2 ways to share either print or social media templates: from the template list or from the template editor. Both sets of instructions below assume the template has been built and tested, and you are ready to share it with users via their teams.

### *From the Template List*

1. Navigate to **Manage Marketing → Manage Templates**.
2. In the list, locate the template you want to share and select **Actions → Team Settings**.
3. On the Team Settings page:
  - a. Check the boxes on the left side for any teams you want to share access with. You can select as many teams as you want.
  - b. Click the **Change Settings** button (pencil icon) at the top of the page.
  - c. In the slide-out panel:
    - i. Ensure that the **Add Access** option is selected.
    - ii. (optional) Set any other options that should apply to this template for the selected teams.
    - iii. Click the **Submit** button.



### *From the Template Editor*

1. Navigate to **Manage Marketing → Manage Templates**.
2. In the list, locate the template you want to share and select **Actions → Edit Template**.
3. Click the **Access** tab.
4. In the Team Access Settings section, click the **Edit** button.
5. On the Team Settings overlay:
  - a. Check the boxes on the left side for any teams you want to share access with. You can select as many teams as you want.
  - b. Click the **Change Settings** button (pencil icon) at the top of the page.
  - c. In the slide-out panel:
    - i. Ensure that the **Add Access** option is selected.
    - ii. (optional) Set any other options that should apply to this template for the selected teams.
    - iii. Click the **Submit** button.

## Emails

Sharing an email template allows any user with access to send that template to any of their contacts with a valid email address. Whether the user can customize the template before sending it is determined by the settings of the individual template.

There are 2 ways to share email templates: from the template list or from the email editor. Both sets of instructions below assume the template has been built and tested, and you are ready to share it with users via their teams.

There are 2 ways to share email templates: from the template list or from the template editor.

### *From the Email List*

1. Navigate to **Email Marketing → Emails**.
2. In the list, locate the template you want to share and select **Actions → Team Settings**.
3. On the Team Settings page:
  - a. Check the boxes on the left side for any teams you want to share access with. You can select as many teams as you want.
  - b. Click the **Change Settings** button (pencil icon) at the top of the page.
  - c. In the slide-out panel:
    - i. Ensure that the **Add Access** option is selected.
    - ii. (optional) In the Email Settings section, set any other options that should apply to this template for the selected teams.
    - iii. Click the **Submit** button.

### *From the Email Editor*

1. Navigate to **Email Marketing → Emails**.
2. In the list, locate the template you want to share and select **Actions → Edit**.
3. Click the **Access** tab.
4. In the Team Access Settings section, click the **Edit** button.
5. On the Team Settings overlay:



- a. Check the boxes on the left side for any teams you want to share access with. You can select as many teams as you want.
- b. Click the **Change Settings** button (pencil icon) at the top of the page.
- c. In the slide-out panel:
  - i. Ensure that the **Add Access** option is selected.
  - ii. (optional) Set any other options that should apply to this template for the selected teams.
  - iii. Click the **Submit** button.

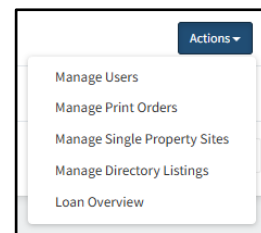
## Managing a Team

Select **Manage Teams** in the navigation menu to open a page listing all the teams for which you are assigned as a manager.

For each team, there is an Actions menu on the right side. The subsections below cover what each of the options in this menu gives you access to.

### Note

Depending on your organization's setup, some of the options listed here may not be available to you.



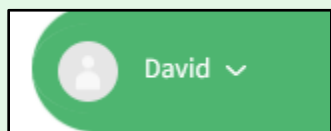
## Manage Users

This option allows you to log in on behalf of another user on a team you manage.

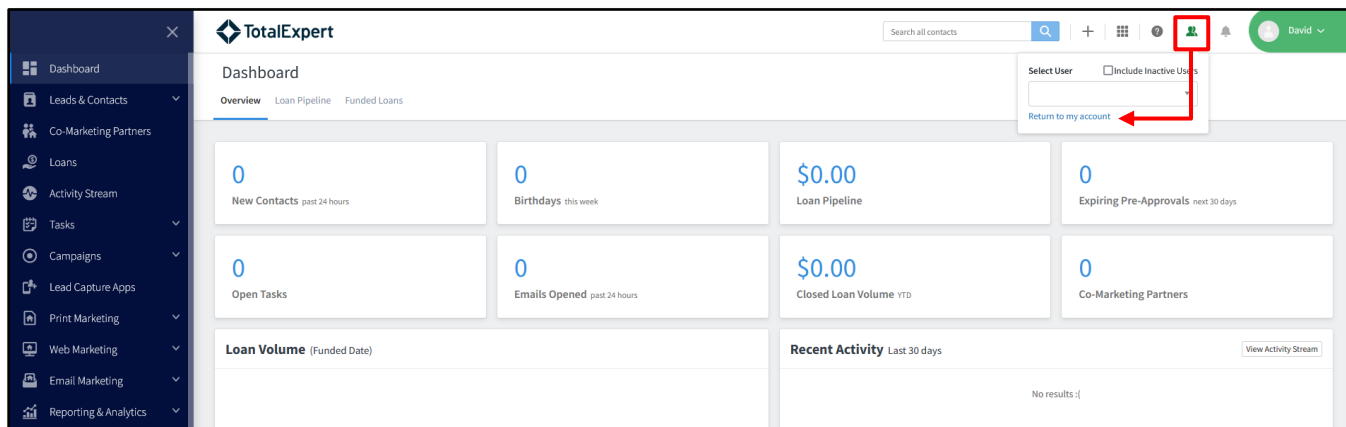
1. On the Manage Teams page, find the team you are interested in and select **Actions → Manage Users**. This opens the Team Users page, which lists all the users assigned to the selected team.
2. On the Team Users page, locate the user you want to log in on behalf of and select **Actions → Login**. TE directs you to the dashboard in the account of the selected user.

### Tip

You can tell when you are logged in on behalf of another user when the name displayed in the upper-right corner of the page is highlighted in green. This name reflects the user you are logged in as, not your own name.



3. Perform whatever actions in the user's account you need to complete.
4. When you are finished, click the **Switch Account** button (people icon) in the header of any page. This opens the Select User box.
5. Click the **Return to my account** link in the box.



You are returned to your own account (note that the name in the upper-right corner is now your own and is not highlighted in green).

## Manage Print Orders

This option allows you to review the print orders that anyone on the selected team has been involved with.

1. On the Manage Teams page, find the team you are interested in and select **Actions → Manage Print Orders**. This opens a list page for all the orders by members of the selected team. Some details of each order are shown on the list page.
2. To view a preview of the ordered piece and see full details of the order, locate the order you want to review and select **Actions → View Report**.
3. The details page is divided into 2 parts:
  - a. On the left side is a listing of all the relevant details for the order, including a link to a PDF of the final piece.
  - b. On the right side is a preview of the piece that was ordered.
    - i. For co-marketed pieces, click the **Cost Split** tab to see the diagram showing which partner is responsible for which parts.
    - ii. For Every Door Direct Mail (EDDM) pieces, click the **Distribution** tab to see a breakdown of the areas that received this piece in the mail.
    - iii. Click the **Proof** tab to return to the preview.



Print

### Order Details

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 EDDM™
Distribution area:	See details
Distribution period:	February 2019

### Payment Details

Total Price	\$1,072.13
Jared White	Canceled \$964.92
Katie Phillips	Declined to Pay \$107.21

Approved By

ProofCost SplitDistribution

## JUST SOLD

11086 Holland Circle Eden Prairie, MN 55347

**Katie Phillips**  
Loan Officer  
NMLS#: 634633  
Office: 952.535.6695  
Cell: 763.555.2362  
katiephillips@thefirst.com  
www.thefirst.com  
100 First Ave  
Minneapolis, MN 55455

### Thank You!

Thank you for doing business with me. It's always a joy to help families make their dream home a reality.

## Manage Single Property Sites

This option allows you to review the single property sites that anyone on the selected team has made.

1. On the Manage Teams page, find the team you are interested in and select **Actions → Manage Single Property Sites**. This opens a list page for all the sites made by members of the selected team. Details of each site are shown on the list page, including a link to the site—click the link to view the site itself.
2. Click the **Inactive Sites** tab to see a list of any sites that have been deactivated.

Active Sites					
Inactive Sites					
Name	Link	Listing ID	Template	Created	Creator
10606 Sonoma Ridge	<a href="http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347mngghybv47">http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347mngghybv47</a>	5026834	Cavallo	08/16/2019 1:10 pm	Katie Phillips Loan Officer
10606 Sonoma Ridge	<a href="http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347mngghybv47">http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347mngghybv47</a>	5026834	Cavallo	09/19/2019 10:21 am	Katie Phillips Loan Officer
10606 Sonoma Ridge	<a href="http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347333">http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347333</a>	5026834	Stylish	10/25/2019 9:56 am	Katie Phillips Loan Officer
10606 Sonoma Ridge	<a href="http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347444">http://sites.totalexpert.net/10606-sonoma-ridge-eden-prairie-mn-55347444</a>	5026834	Modern	10/25/2019 1:43 pm	Katie Phillips Loan Officer
123 Main Street - 6/24/20	<a href="http://sites.totalexpert.net/123-main-street-62420-241062">http://sites.totalexpert.net/123-main-street-62420-241062</a>		Open House	06/24/2020 10:05 am	Katie Phillips Loan Officer
1331 North Arm Drive	<a href="http://sites.totalexpert.net/1331-north-arm-drive-orono-mn-5536455">http://sites.totalexpert.net/1331-north-arm-drive-orono-mn-5536455</a>	5264725	Modern	10/23/2019 10:20 am	Katie Phillips Loan Officer

## Manage Directory Listings

This option allows you to review and modify the directory listings that anyone on the selected team has created.

6

www.totalexpert.com

©2025 Total Expert Inc. All Rights Reserved.



1. On the Manage Teams page, find the team you are interested in and select **Actions → Manage Directory Listings**. This opens a list page for all the listings made by members of the selected team. Details of each site are shown on the list page.
2. On the left side of the page, select the checkbox for a listing. Then either:
  - a. Click the **Update Selected** button (pencil icon) to open a slide-out panel where you can modify the details of the listing. Click the **Submit** button to save your changes.
  - b. Click the **Delete Selected** button (trash can icon) to delete the listing permanently.

## Loan Overview

This option allows you to review a summary of the loans attached to any user on the selected team.

1. On the Manage Teams page, find the team you are interested in and select **Actions → Loan Overview**. This opens a list page with all the members of the selected team listed on the left side.
2. On this page, click a user's name to see the aggregated numbers for all that user's loans.

