Permission Recommendations – Banking

This list does not include all the permissions available in Total Expert; you will see other permissions listed in the platform. This list is merely a suggested starting point for several common TE personas in banking organizations. You can give any available permissions to any user role.

The shorthand codes in the Feature column are keyed in the table header. These codes are chosen so you can search for the code text and find that letter combination only in the Feature column (and in the header). The entire header, including the feature key, is repeated on each page for reference.

Feature Key					
		help center	HLP	organization admin	OADM
campaigns	CMPN	intelligence	INT	platform	PTFM
co-marketing	CMK	integrations	ITG	print marketing	PRNT
compliance	CMPL	journeys	JRN	reporting	RPT
email marketing	EML	leads & contacts	L&C	settings	STG
focused view	FV	loans	LNS	tasks	TSK
general merchandise	MRCH	manage marketing	MKTG	Web marketing	WMKT

Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
EML	Email Marketing → Emails	Access Controlled Item Settings	Allows the user to select user settings and team settings for email templates created by the user.	✓	✓			
EML MKTG	Email Marketing → Emails Manage Marketing → Content Blocks	Access Items Templates	Allows the user to give or revoke the ability to create an email template or content block to their organization or individual user roles in their organization.	✓	✓			
JRN L&C OADM	Journeys Add menu → Create Contact Import Data	Accounts: View	Allows the user to create a trigger in a journey that fires when a product is created or updated or on a date associated with a product. Allows the user to add an account to a contact while creating that contact. Allows the user to import product data.	✓	✓			
PTFM	Print Marketing → Create New	Advanced Pricing Engine Options	Allows the user to input additional parameters to pass to the API when generating a rate flyer.	✓	✓	✓		

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EML MKTG	Email Marketing → Emails Manage Marketing → Manage Templates	Blocks: View Expert Content Gallery	Allows the user to view the Expert Content tab and select corresponding blocks in the Blocks tab of the WYSIWYG email and print editors. Activates the Expert Content tab in the print Template Gallery.	✓	✓			
EML MKTG	Email Marketing → Emails Manage Marketing → Manage Templates	Blocks: View Organization Content Gallery	Allows the user to view the Organization Content tab and select corresponding blocks in the Blocks tab of the WYSIWYG email and print editors. Activates the Organization Content tab in the print Template Gallery.	✓	✓			
CMPL	Compliance → Media Compliance Report	Compliance Report	Allows the user to review information relating to emails and other media that have been created and distributed by users in their organization.	✓				
RPT	Reporting → Connected Partner Report	Connected Partner Report	Allows the user to see pending and active co-marketing connections of users in their organization and to review how those connections are being used.	✓	✓			
EML FV	Email Marketing → Emails Manage Marketing → Focused View Builder	Contact View: Organization	When sending broadcast emails, this allows the user to access contacts owned by or assigned to any user in their organization. Allows the user to select specific teams a specific focused view should apply to.	✓	✓			
L&C	Leads & Contacts → Contacts	Contact: New Contact Details	Allows the user to view and use the 2022 version of the contact details page.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts	Contact: Transfer Owner	Allows a user to transfer ownership of a contact record to another Total Expert user.	✓	✓			
MKTG	Manage Marketing → Content Blocks	Content Block: Delete	Allows the user to delete a saved content block.	✓	✓			
MKTG	Manage Marketing → Content Blocks	Content Block: Edit	Allows the user to edit a saved content block.	✓	✓			

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MKTG	Manage Marketing → Content Blocks	Content Block: Manage Org Blocks	Allows the user to view content blocks created by any user in their organization.	✓	✓			
MKTG EML	Manage Marketing → (Content Blocks or Manage Templates) Email Marketing → Emails	Content Blocks Module	Allows the user to view the list of saved content blocks. Allows the user to view and select content blocks in the WYSIWYG print and email editors.	✓	✓			
MKTG PRNT	Manage Marketing → Manage Templates Print Marketing → Create New	Content: Content Module	Allows an admin user to define pre-set options in a media template that an end user building a piece from that template can choose to add to their piece. Allows an end user to select one of these pre-set options.	✓	✓	✓	✓	✓
EML	Email Marketing → Emails	Content: View Basic Content Gallery	Allows the user to view the Basic Content tab and select corresponding templates in the email Template Gallery.	✓	✓			
EML	Email Marketing → Emails	Content: View Expert Content Gallery	Allows the user to view the Expert Content tab and select corresponding templates in the email Template Gallery.	✓	✓			
EML	Email Marketing → Emails	Content: View Organization Content Gallery	Allows the user to view the Organization Content tab and select corresponding templates in the email Template Gallery.	✓	✓			
L&C	Leads & Contacts → Groups	Copy Groups To Users in Org	Allows the user to select an option while creating a contact group that would make that new group available to all users in their organization.	✓	✓			
OADM	Organization Admin → Custom Fields	Create Custom Fields - Account	Allows the user to select Account as the field type when creating a custom field.	✓				
EML	Email Marketing → Emails	Create Video Email Template	Allows the user to designate a new email template as a video template. A user sending an email based on a video template must select a video before the message can be sent.	✓	✓			

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L&C LNS OADM	Import Data	Data Importer: Administrator	Allows the user to import loans and users (in addition to contacts) for any user in their organization and to see past imports they have performed for any user.	✓	✓			
OADM L&C LNS	Organization Admin → Data Importer	Data Importer: Feature	Allows the user to import one or more .csv files containing data for leads or loans. As part of the import process, the imported data can be specified to be associated with any user.	✓	✓			
OADM	Import Data	Data Importer: User	Allows the user to access the data importer tool via the main navigation menu.	✓				
MKTG	Manage Marketing → Manage Templates	Delete Template	Allows the user to delete a media template in the UI.	✓	✓			
EML	Leads & Contacts → Contacts	Edit Lead Email When Opted-Out	Allows the user to edit the email address of a contact that has opted out of communications.	✓	✓	✓		
EML	Email Marketing → Emails	Email Marketing: Allow Blank Template	Allows the user to create new email messages from scratch to send immediately. The user has the option to save these messages as templates to the list.	✓	✓			
EML	Email Marketing → Emails	Email Marketing: Append Signature	Enables the option for a user to add their configured email signature to an individual email message whose template does not include a signature.	✓	✓			
EML	Email Marketing → Email Stats	Email Marketing: Cancel Send	Allows the user to cancel email messages that have been scheduled to send at a future date or time.	✓	✓	✓		
EML	Email Marketing → Emails	Email Marketing: Compliance Notification Settings	Allows the user to apply a threshold value and one or more compliance reviewers to an email template.	✓	✓			

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STG EML L&C LNS	settings menu → Email Settings Email Marketing → Emails Leads & Contacts → Contacts Loans	Email Marketing: Email Lead	Enables the Email Settings option on the settings menu. Enables the Emails option in the Email Marketing section of the navigation menu. Allows the user to send an email to a contact from the Contacts page. Allows the user to send an email to a loan participant from the Loans page.	✓	✓	✓		
EML RPT	Email Marketing → Emails Reporting → Email Analytics	Email Marketing: Email Library	Allows the user to view the list of saved emails and to edit, delete, and send messages from the list. Allows the user to view the Email Analytics report.	✓	✓	✓		
EML	Email Marketing → (Emails, Email Stats, or Broadcast Stats)	Email Marketing: Statistics	Allows the user to review statistics for email messages that they have scheduled or sent.	✓	✓	✓		
EML	Email Marketing → Emails	Email: Access to Unpublished Gallery Templates	Allows the user to select between Published and Unpublished templates in the email gallery.	✓	✓			
EML	Email Marketing → Emails	Email: Allow Copying Emails	Allows the user to create an exact copy of an email template that can then be modified.	✓	✓			
EML	Email Marketing → Emails	Email: Code Editor	Allows the user to view and edit the HTML code that describes an email template.	✓	✓			
EML	Email Marketing → Emails	Email: Compatibility Redirect	Allows the user to open an email template in the same version of the email builder that was used to create it (blocks-compatible or legacy). Blocks-compatible templates are marked with an icon next to the name on the email list page.	✓	✓			

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EML	Email Marketing → Emails	Email: Create Base Template	Allows the user to designate an email template as the base template for their organization. Users with access will then be able to create templates for their own use starting from this base template.	✓	✓			
EML	Email Marketing → Emails	Email: Disclaimer	Allows the user to either replace or append to the standard disclaimer in an email block using a disclaimer saved in the organization's setup.	✓	✓			
LNS EML	Loans Email Marketing → Emails	Email: Loan Status Section	Allows the user to create and send an email to a loan customer containing information regarding their loan.	✓	✓			
EML	Email Marketing → Emails	Email: New Email Builder	Allows the user to create or edit an email template using a WYSIWYG-style builder, including selecting among saved templates from a gallery as a starting point.	✓	✓			
EML	Email Marketing → Emails	Email: Publish Organization Templates	Allows the user to publish an email as an organization template in the WYSIWYG email builder.	✓	✓			
EML	Email Marketing → Emails	Email: Set Transactional Template	Allows the user to designate an email template as transactional.	✓	✓			
EML	Email Marketing → Emails	Email: Skip Dedup	Allows the user to circumvent the deduplication logic for an email template that otherwise suppresses sending multiple emails driven by that template to the same contact in a 24-hour period.	✓	✓			
EML	Email Marketing → Emails	Email: Test Send Mode	Allows a user to select Test Mode when sending an email. This bypasses deduplication logic so the same email template can be sent to the same address more than once in a 24-hour period.	✓	✓			
EML	Email Marketing → Emails	Email: Vidyard Integration	Allows the user to integrate a Vidyard account with their Total Expert account. Allows the user to record a video or select 1 or more saved videos from their Vidyard account and add them to an email template.	✓	✓			

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EML	Email Marketing → Emails	EmailClassicSender: VidyardIntegration	Allows the user to add placeholders to reference a Vidyard video in an email template that is created using the classic email builder.	✓	✓			
HLP	Help Center menu	Help Library	Allows access to the Help Center menu.	✓	✓	✓	✓	
HLP	Help Center → Help	Help Library: General Help	Directs the user to a general support help site.	✓	✓	✓	✓	
HLP	Help Center → Product User Guides	Help Library: Product Guides	Allows the user to access a Freshdesk page with links to several product guide documents.	✓	✓	✓	✓	✓
WMKT	Lead Capture Apps	HomeValuation	Activates the Home Valuation layout option when creating or editing a lead capture page.	✓	✓	✓		
STG ITG L&C	settings menu → Integration Settings	Integration: BombBomb	Allows the user to integrate a BombBomb account with their Total Expert account. Allows the user to send a BombBomb video to a contact from the Contacts page.	✓	✓	✓	✓	
STG ITG	settings menu → Integration Settings	Integration: Facebook	Allows the user to integrate a Facebook account with their Total Expert account.	✓	✓	✓	✓	
STG ITG	settings menu → Integration Settings	Integration: LinkedIn	Allows the user to integrate a LinkedIn account with their Total Expert account.	✓	✓	✓	✓	
STG ITG	settings menu → Integration Settings	Integration: Twilio	Allows the user to integrate a Twilio account with their Total Expert account.	✓	✓	✓	✓	
STG ITG	settings menu → Integration Settings	Integration: Twitter	Allows the user to integrate a Twitter account with their Total Expert account.	✓	✓	✓	✓	
JRN CMPN	Journeys	Journeys	Allows the user to access the journey list page and activate/deactivate available journeys.	✓	✓	✓		
JRN CMPN	n/a	Journeys: Allow SMS Send	Allows a user with an integrated Twilio account to send SMS messages as part of a journey.	✓	✓	✓		

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JRN CMPN	Journeys	Journeys: Create New Journey	Allows the user to begin creating a new journey from the journey list page. Allows the user to create an exact copy of an existing journey.	✓	✓			
JRN CMPN	Journeys	Journeys: Journey Published Trigger	Allows the user to create a trigger in a journey that fires for a specified contact group for a user when the journey is published for that user.	✓	✓			
JRN CMPN L&C	Leads & Contacts → Contacts	Journeys: Lead Page View	Allows the user to associate a published journey with a selected contact. Allows the user to filter the contacts list using journey-related criteria.	✓	✓	✓		
JRN CMPN	Journeys	Journeys: Lead Status	Allows the user to create statuses to be used in journeys.	✓	✓			
JRN CMPN	Journeys	Journeys: Non-Mortgage Accounts	Allows the user to select a product type as a parameter in the journey conditions Loan Value, Loan Date, Loan Status, Loan Type, Loan Program, and Loan Purpose.	✓	✓			
JRN CMPN	Journeys	Journeys: Org User Settings	Allows the user to configure various publishing settings associated with journeys.	✓	✓			
JRN CMPN	Journeys	Journeys: Trigger Inline Conditions	Allows the user to add one or more conditions to any trigger that will be applied before a contact is affirmatively added to a journey. A contact that does not match the conditions is not added and is thus not counted in the statistics for the journey.	✓	✓			
JRN CMPN	Journeys	Journeys: v2 Editor	Allows the user to create a new journey or update an existing journey using the 2nd-generation journey editor interface.	✓	✓	✓		
JRN CMPN	Journeys	Journeys: View Journey Report	Allows the user to create reports for a journey that the user has access to view.	✓	✓			

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L&C	Leads & Contacts → Contacts	Lead Action Plans: Assign	Allows the user to assign a lead action plan to a specific lead, then make limited modifications to that lead action plan that apply to that lead only, or remove a lead action plan assigned to a lead.	✓	✓	✓		
L&C	Leads & Contacts → Settings → Action Plans	Lead Action Plans: Create	Allows the user to create, edit, and delete lead action plans.	✓	✓	✓		
L&C	Leads & Contacts → (Contacts or Archived Contacts)	Lead Management: Limited	Allows the user to view, edit, and delete contacts and allows the user to search for contacts using the search bar in the header section of every page. Allows the user to view the list of archived contacts.	✓	✓	✓		
L&C	Add menu → Create Contact	Lead Management: Unlimited Add On	Allows the user to create a contact manually in the platform.	✓	✓	✓		
L&C	Leads & Contacts → Lead Management → Lead Sources	Lead Settings: Lead Intake Routes	Allows the user to add, edit, pause, and delete lead sources.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Settings → Lead Routing	Lead Settings: Routes	Allows the user to add, edit, and delete lead routes. Also allows the user to select a lead route to use when defining a lead source rule.	✓	✓	✓		
L&C	Leads & Contacts → Settings → Lead Sources	Lead Settings: Source Welcome Email	Allows the user to select (when configuring a lead source rule) a welcome email to be sent to leads automatically when they are created. Also allows the user to select a delay time to wait before sending the welcome email.	✓	✓	✓		
L&C	Leads & Contacts → Settings → Lead Sources	Lead Settings: Sources	Allows the user to add, edit, and delete lead source rules. Also allows the user to specify (or create) a lead source rule when creating a lead capture page.	✓	✓	✓		

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L&C WMKT	Leads & Contacts → Settings → Lead Sources Lead Capture Apps Leads & Contacts → Contacts Add menu → Create Contact	Lead Sources: Create Lead Source	Allows the user to create, edit, and delete lead sources.	✓	✓	✓		
L&C	Leads & Contacts → Contacts Reporting → Appointments Campaigns → Campaign Builder	Lead: Appointments	Allows the user to schedule appointments with contacts. Allows the user to review a report of appointments scheduled for either members of teams of which the user is the manager or the user's co-marketing partners. Allows the user to select from Appointments criteria when building an inclusion rule or exclusion rule in the campaign builder.	✓	✓	✓		
L&C	Leads & Contacts → Focused View	Lead: Custom Focused View	Allows the user to create, edit, and delete custom views for their own use.	✓				
L&C	Leads & Contacts → Contacts Add menu → Create Contact	Lead: Edit Credit Score Info	Allows the user to edit credit score information as part of editing a contact record.	✓	✓	✓	✓	✓

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L&C	Leads & Contacts → Contacts Add menu → Create Contact	Lead: Edit Employer Info	Allows the user to edit employer information as part of editing a contact record.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts Add menu → Create Contact	Lead: Edit Listing/Transaction Dates	Allows the user to edit transaction-related dates as part of editing a contact record.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts Add menu → Create Contact	Lead: Edit Spouse Info	Allows the user to edit spouse information (including anniversary) as part of editing a contact record.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts Add menu → Create Contact	Lead: Edit Web/Social Values	Allows the user to edit website information as part of editing a contact record.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts	Lead: Export Leads to CSV	Allows the user to export their contact list data as a comma-separated variable (.csv) file.	✓	✓	✓	✓	
FV CMPN	Leads & Contacts → Focused View Campaigns → Campaign Builder	Lead: Focused View	Allows the user to access the Focused View page. Allows the user to select from Outcomes criteria when building an inclusion rule or exclusion rule in the campaign builder.	✓	✓	✓	✓	

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L&C	Leads & Contacts → Contacts	Lead: Group SMS	Allows the user to send a text message to one or more Total Expert contacts.	✓	✓	✓		
L&C	Leads & Contacts → Groups	Lead: Groups	Allows the user to create, edit, and delete groups to associate with their contacts.	✓	✓	✓		
L&C	Mange Marketing → Focused View	Lead: Manage Focused View	Allows the user to create and modify views in the Focused View for users in their organization.	✓	✓			
L&C	Leads & Contacts → Contacts	Lead: Merge Contacts	Allows the user to combine multiple contact records they own into a single record.	✓	✓			
RPT	Reporting → (Appointments, Count Report, ROI Tracker, or Transactions) Dashboard → Loan Pipeline	Lead: Reports	Allows the user to view the Appointments, ROI Tracker, and Transactions reports. Allows the user to view a report summarizing the number of new contacts generated over time. Allows the user to access the Loan Pipeline dashboard.	✓	✓	✓		
RPT	Reporting → ROI Tracker	Lead: ROI Tracker	Allows the user to review a report of their contact generation and gross commission income data.	✓	✓			
L&C TSK	Leads & Contacts → Contacts	Lead: Schedule	Allows the user to see a calendar view for each contact. The calendar shows tasks and automatic campaign events associated with that contact.	✓	✓	✓		
L&C	Leads & Contacts → Contacts	Lead: Silence Contact	Allows the user to silence and unsilence all communication for a contact. This is distinct from the option to mark a contact as having opted out of email communication, which is always available.	✓	✓	✓		
L&C	Leads & Contacts → Contacts	Lead: Spouse Details	Allows the user to view and add contact information for the spouse of each of the user’s contacts.	✓	✓	✓		
L&C	Leads & Contacts → Contacts	Lead: Stats Filter	Allows the user to filter the Contacts page by email activity.	✓	✓	✓		

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L&C	Leads & Contacts → Contacts	Lead: View Credit Score Info	Allows the user to view credit score information when viewing a contact's details page.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts	Lead: View Employer Info	Allows the user to view employer information when viewing a contact's details page. Allows the user to filter by employer information on the contact list.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts	Lead: View Listing/Transaction Dates	Allows the user to view transaction-related dates when viewing a contact's details page.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts	Lead: View Spouse Info	Allows the user to view spouse information (including anniversary) when viewing a contact's details page.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts	Lead: View Web/Social Values	Allows the user to view website information when viewing a contact's details page.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → (Contacts or Archived Contacts)	Leads: Archive	Allows the user to archive a contact. Allows the user to review a list of archived contacts and reactivate an archived contact.	✓	✓	✓		
L&C	Leads & Contacts → Contacts	Leads: Bulk Delete	Allows the user to delete one or more contacts via the contact list's Actions menu. Contacts that are owned by another user or that have loans associated with them cannot be deleted (with or without this permission enabled).	✓	✓	✓		
L&C	Leads & Contacts → Contacts	Leads: Single Delete	Allows the user to delete a single contact via the contact list's context menu for a record or the contact's details page. Contacts that are owned by another user or that have loans associated with them cannot be deleted (with or without this permission enabled).	✓	✓	✓		
LNS L&C	Loans Leads & Contacts → Contacts	Loans: Edit	Allows the user to modify loan details in Total Expert. Details updated in the Total Expert system are *not* pushed back to the loan origination system. Allows the user to create a new loan record in Total Expert.	✓	✓			

Feature Key					
campaigns	CMPN	help center	HLP	organization admin	OADM
co-marketing	CMK	intelligence	INT	platform	PTFM
compliance	CMPL	integrations	ITG	print marketing	PRNT
email marketing	EML	journeys	JRN	reporting	RPT
focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
		manage marketing	MKTG	Web marketing	WMKT

Feature	Navigation	Permission Name	Description	User Persona (* = optional) Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
LNS	Loans	Loans: Edit Referral Source	Allows the user to modify the referral source for a loan without being able to edit the remaining attributes.	✓	✓			
LNS L&C OADM	Loans Leads & Contacts → Contacts Organization Admin → Data Importer	Loans: View	Allows the user to view the list of all loans associated with the user's contacts. Allows the user to view any loans associated with a specific contact. Allows the user to select loans as an option when initiating a data import. Allows the user to select from Loan Dates and Loan Information criteria when building an inclusion rule or exclusion rule in the campaign builder. Allows the user to select from loan-related options when adding text placeholders to an email template. Allows the user to access the Loan Pipeline and Funded Loans dashboards.	✓	✓	✓		
LNS	Loans	Loans: View Birthday	Allows the user to see the borrower's birthday in the loans list.	✓	✓	✓	✓	
L&C	Leads & Contacts → Contacts	Master Contact Transfer Owner	Allows the user to transfer ownership of contacts owned by another user while logged in as that user.	✓	✓			
L&C OADM	Leads & Contacts → Contacts	Master Lead Export	Allows the user to export a CSV file of contacts for another user while logged in as that user.	✓	✓			
PRNT	Print Marketing → (Create New, Saved, or Orders)	Media Creator	Allows the user to use the media creator to build flyers, postcards, merchandise, and so on from pre-defined templates. Allows the user to review these created pieces and select among appropriate publishing and ordering options. Allows the user to review orders of these created pieces.	✓	✓	✓		
PRNT	Print Marketing → Create New	Media Creator: Sample PDF Preview	Allows the user to generate sample PDFs of print media templates.	✓	✓	✓		

Feature Key					
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co-marketing	CMK	intelligence	INT	platform	PTFM
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focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
MKTG	Manage Marketing → Template Snippets	Media Creator: Template Snippets	Allows the user to create, edit, and delete code snippets to use when creating print and email templates.	✓	✓			
MKTG CMPL RPT	Manage Marketing → (Folders & Tags, Manage Templates, Global Image Library, or Approval Flows) Compliance → Media Markups Reporting → Print Orders	Media Manager	Allows the user to: create, edit, and delete folders and tags; manage media templates; upload images to be used by anyone in their organization; create, edit, and delete media approval flows; and review the default print template markups for their organization.	✓	✓			
CMPL	Compliance → (any)	Media Manager: Compliance and Markups	Enables the Compliance option in the navigation menu.	✓	✓			
EML	Email Marketing → Approval Requests	Media Manager: Email Approvals	Allows the user to review email drafts based on template messages before the drafts are sent out.	✓	✓			
MKTG	Manage Marketing → Loan Scenarios	Media Manager: Loan Scenarios	Allows the user to create, edit, and delete loan scenarios to be used with marketing assets.	✓	✓			
MKTG	Manage Marketing → Manage Templates	Media Manager: View Media Templates	Allows the user to see a read-only view of the code generating a particular media template.	✓	✓			
MKTG	Manage Marketing → Manage Templates	Media Template: Groups Image Uploader	Allows the user to upload an image to represent a group in the WYSIWYG editor.	✓	✓			
PRNT MKTG	Print Marketing → Image Library Manage Marketing → Global Image Library	Media: Images Library	Allows the user to save images to a personal image library in their account. Allows the user to save images to an organization-wide image library in their account.	✓	✓	✓		

Feature Key					
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co-marketing	CMK	intelligence	INT	platform	PTFM
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focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
PRNT WMKT MRCH	Print Marketing → Create New Web Marketing → Create New General Merchandise → General Merchandise → Create New	Media: Video Link	Allows the user to view a video explanation of the media creation process.	✓	✓			
CMPN	Campaigns → Campaign Builder	Multi-Channel Campaigns: Assign Users	Allows the user to configure whether a campaign is mandatory or optional for its senders when creating a new campaign or editing the settings of an existing campaign. Allows the user to configure and see information regarding senders in the campaign builder.	✓	✓			
CMPN	Campaigns → Campaign Builder	Multi-Channel Campaigns: Audience Preview	Allows the user to run a query that returns the exact list of contacts who will be targeted by a campaign and presents the results as a downloadable CSV file. The campaign must be fully defined and in the Ready state for this to be available.	✓	✓			
CMPN	Campaigns → Campaign Builder	Multi-Channel Campaigns: Create & Copy	Allows the user to create a new multi-channel campaign. Allows the user to make a copy of an existing multi-channel campaign.	✓	✓			
CMPN	Campaigns → Campaign Builder	Multi-Channel Campaigns: Set Goals	Allows the user to configure whether recipients of a campaign's materials are removed from the campaign when TE detects they have opened a new loan (and the loan status that governs this) when creating a new campaign or editing the settings of an existing campaign.	✓	✓			
CMPN	Campaigns → Campaign Builder	Multi-Channel Campaigns: View	Allows the user to view multi-channel campaigns.	✓	✓			

Feature Key					
		help center	HLP	organization admin	OADM
campaigns	CMPN	intelligence	INT	platform	PTFM
co-marketing	CMK	integrations	ITG	print marketing	PRNT
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focused view	FV	loans	LNS	tasks	TSK
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				User Persona (* = optional)				
Feature	Navigation	Permission Name	Description	Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
EML	Email Marketing → (any)	Navigation: Email Marketing	Enables the Email Marketing option in the navigation menu.	✓	✓	✓		
JRN CMPN	Journeys Campaigns → Campaign Builder	Navigation: Lead Surveys	Allows access to the trigger Contact Survey Response Received and the condition Contact Survey Response Value in the list of journey components. Allows use of the contact survey-related endpoints of the public API (provided they are allowed access to the endpoints). Allows the user to select from Contact Survey Response criteria when building an inclusion rule or exclusion rule in the campaign builder.					✓
L&C	Leads & Contacts → (any)	Navigation: Leads & Contacts	Enables the Leads & Contacts option and its Settings submenu in the navigation menu.	✓	✓	✓		
OADM	Organization Admin → (any)	Navigation: Organization	Enables the Organization Admin option in the navigation menu.	✓	✓			
TSK CMPN	Tasks → (any) Campaigns → Campaign Builder	Navigation: Tasks	Enables the Tasks option in the navigation menu. Allows the user to select from Incomplete Task criteria when building an inclusion rule or exclusion rule in the campaign builder.	✓	✓	✓	✓	
WMKT	Web Marketing → (any)	Navigation: Web Marketing	Enables the Web Marketing option in the navigation menu.	✓	✓	✓		
PTFM	n/a	New UI	Enables the 2019 user interface. Should be on for every user, regardless of role.	✓	✓	✓	✓	✓
OADM	Organization Admin → Users	ORG Admin/Manager: Users	Allows the user to view a list of the users in their organization and basic information for each user, such as user role and whether the user is active.	✓	✓			
OADM	Organization Admin → Users	ORG Admin: Add New User	Allows the user to create a new user in their organization.	✓	✓			
OADM	Organization Admin → Users	ORG Admin: Change User Status	Allows the user to toggle the status of a user (active/inactive) in their organization.	✓	✓			

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focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional)				
				Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
RPT CMPL OADM	Reporting → (Marketing Overview, Marketing Content, Connected Partner Report, Social Media Report, Print Orders, User Follow Up Report, Corporate Billing, User Data, or User Engagement) Compliance → (Approved Media, Websites, Media Compliance Report, or Directory Listings Report) Organization Admin → Data Validation	ORG Admin: Compliance Reports	Allows the user to view several reports from the Reporting and Compliance menus. Allows the user to validate data imports from the Organization Admin menu.	✓	✓			
OADM	Organization Admin → Configuration Settings	ORG Admin: Configuration Settings	Allows the user to access the Configuration Settings page. Page is blank by default.	✓	✓			
OADM	Organization Admin → Custom Fields	ORG Admin: Custom Fields - View All for Organizati	Allows the user to view a list of custom fields for their own organization.	✓	✓			
OADM	Organization Admin → Custom Fields	ORG Admin: Custom Fields - Write	Allows the user to create, edit, and archive (or unarchive) custom fields.	✓	✓			
OADM	Organization Admin → Data Validation	ORG Admin: Data Validation	Enables the Organization Admin → Data Validation option in the navigation menu.	✓	✓			
OADM	Organization Admin → Users	ORG Admin: Edit User	Allows the user to edit a user in their organization.	✓	✓			

Feature Key					
campaigns	CMPN	help center	HLP	organization admin	OADM
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email marketing	EML	journeys	JRN	reporting	RPT
focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
EML OADM	Email Marketing → Emails	ORG Admin: Email User Permissions	Allows the user to configure: - Which members of their organization or user teams can view or edit email templates - Which members of their organization or user teams can share email templates with co-marketing partners - Which (if any) approval process a message will be subject to when created by a specified member of the organization or user team	✓	✓			
OADM L&C LNS	Organization Admin → Data Importer	ORG Admin: Importer	Allows the user to import one or more .csv files containing data for leads or loans.	✓	✓			
OADM L&C LNS	Organization Admin → Data Importer	ORG Admin: Importer User Search	Allows the user to search for users in their own organization when assigning where the imported data will be assigned using the Data Importer.	✓	✓			
OADM PTFM	Switch Account button in header	ORG Admin: Log in as User, Carry Over Permissions	Allows the user to log in as another user in their organization through the header without changing which page in the UI is active.	✓	✓			
OADM	Organization Admin → Users	ORG Admin: Login as User	Allows the user to log in as another user in their organization through the user list.	✓	✓			
OADM	Organization Admin → Manage Cost Centers	ORG Admin: Manage Cost Centers	Allows the user to view a list of saved cost centers in their organization and to create, edit, and delete cost centers in that list.	✓	✓			
OADM	Organization Admin → Data Importer	ORG Admin: Marketing Automation	Allows the user to select whether automation should run automatically on the Automation page of the import.	✓	✓			
OADM	Organization Admin → Configuration Settings	Org Admin: Products Panel Add Products	Allows the user to add an existing product to a category or create a new category (using an existing product).	✓	✓			

Feature Key					
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focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
OADM	Organization Admin → Configuration Settings	Org Admin: Products Panel Configuration	Allows the user to modify settings associated with the configurable product panel.	✓	✓			
OADM STG	Organization Admin → Marketing Settings	ORG Admin: Settings	Allows the user to modify settings that apply to all users in the organization. Includes the ability to modify: - EHO, EHL, and company logos - Disclaimers - Web URLs	✓	✓			
OADM	Organization Admin → Loan Settings Organization Admin → Configuration Settings	ORG Admin: Settings Loans	Allows the user to add, remove, or modify the types, statuses, purposes, or programs that can be selected for a loan by a user in the organization.	✓				
OADM	Organization Admin → User Interface Settings Organization Admin → Configuration Settings	ORG Admin: Settings User Interface	Allows the user to change basic UI elements seen by all users in the organization (such as as company logo and color scheme).	✓				
MKTG OADM	Manage Marketing → Over Limit Orders	ORG Admin: Threshold Approver	Allows the user to review and then approve or reject orders that would cause the user placing the order to exceed their daily or weekly spending limit. This permission allows the user to review all over-limit orders placed by members of their organization.	✓	✓			
RPT OADM	Reporting → User Data	ORG Admin: User Report	Allows the user to review various user attributes for members of their organization.	✓	✓			
OADM	Organization Admin → User Roles	ORG Admin: User Roles	Allows the user to create, edit, copy, and delete a user role to be used by the organization.	✓				

Feature Key

campaigns	CMPN	help center	HLP	organization admin	OADM
co-marketing	CMK	intelligence	INT	platform	PTFM
compliance	CMPL	integrations	ITG	print marketing	PRNT
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focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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				User Persona (* = optional)				
Feature	Navigation	Permission Name	Description	Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
PTFM	dashboard → Marketing tab	Org Data Aggregate: Campaign Activity	Allows the user to see data on the Marketing dashboard tab's Campaign Activity widget.	✓	✓			
PTFM	dashboard → Marketing tab	Org Data Aggregate: Contacts	Allows the user to see data on the Marketing dashboard tab's Total Contacts, New Leads, New Leads by Source, and Contacts By Organization Group widgets.	✓	✓			
PTFM	dashboard → Email tab	Org Data Aggregate: Email Activity	Allows the user to see data on the Email dashboard tab.	✓	✓			
OADM	Organization Admin → Data Importer	ORG Importer: Test Import Step	Allows the user to run a Test step during the process of importing a .csv file of either contact or loan data. The test checks for errors in the file or field mapping.	✓	✓			
RPT WMKT OADM	Reporting → Social Media Report	Org Report: Social Media	Allows the user to review a report of social media posts created by members of their organization.	✓	✓			
MKTG OADM	Manage Marketing → Manage Templates	ORG Upload Static Media	Allows the user to upload static media files to their marketing library.	✓	✓			
OADM	Organization Admin → Configuration Settings	OrganizationSettingsRoles	Allows the user to view and create financial relationship roles.	✓				
STG	settings menu → Payment Methods	Payment Methods: Grant LO Access	Activates the menu option at settings menu → Payment Methods.	✓	✓	✓		
MKTG PRNT WMKT	Manage Marketing → Manage Templates	Print/Social: Allow Copying Template	Allows the user to create a clone of an existing media piece.	✓	✓			
MKTG PRNT WMKT	Manage Marketing → Manage Templates	Print/Social: Content Placeholders	Allows the user to access the template editor.	✓	✓			

TOTAL EXPERT

Feature Key					
campaigns	CMPN	help center	HLP	organization admin	OADM
co-marketing	CMK	intelligence	INT	platform	PTFM
compliance	CMPL	integrations	ITG	print marketing	PRNT
email marketing	EML	journeys	JRN	reporting	RPT
focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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				User Persona (* = optional)				
Feature	Navigation	Permission Name	Description	Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
MKTG PRNT WMKT	Manage Marketing → Manage Templates	Print/Social: Edit Base Template	Allows the user to edit a media template designated as a base template.	✓	✓			
MKTG PRNT WMKT	Manage Marketing → Manage Templates	Print/Social: Edit Template	Allows the user to edit a media template.	✓	✓			
L&C	Leads & Contacts → Contacts	Products Panel	Allows the user to see the Products panel on the contact details page.	✓	✓	✓		
JRN	Journeys	Related Users: Allow Access	Allows the user to add a Contact Related trigger to a journey.	✓				
L&C	Leads & Contacts → Contacts	Related Users: Edit Related Users	Allows the user to edit the related users associated with a given contact.	✓				
JRN	Journeys	Related Users: Journey Event User Settings	Allows the user to select an actor for certain journey components.	✓	✓			
L&C	Leads & Contacts → Contacts	Related Users: View Related Users	Allows the user to view the related users associated with a given contact.	✓	✓	✓	✓	
RPT CMPL OADM	Reporting → Corporate Billing	Reporting: Corporate Billing	Allows the user to review a report of charges incurred by members of their organization through Total Expert.	✓	✓			
RPT PRNT	Reporting → Print Orders	Reporting: Print Orders	Allows the user to review a report of print media orders placed manually in a specified time range.	✓	✓			
L&C	Leads & Contacts → Contacts Leads & Contacts → Lead Management → Leads	Saved Filters	Allows the user to save a customized view on the 2020 version of the contact list or the lead list.	✓	✓	✓		

Feature Key					
		help center	HLP	organization admin	OADM
campaigns	CMPN	intelligence	INT	platform	PTFM
co-marketing	CMK	integrations	ITG	print marketing	PRNT
compliance	CMPL	journeys	JRN	reporting	RPT
email marketing	EML	leads & contacts	L&C	settings	STG
focused view	FV	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
CMPN EML JRN	Email Marketing → Sending Profiles Campaigns → Campaign Builder Journeys	Sending Profiles	Allows the user to create, edit, and delete sending profiles. Allows the user to apply a sending profile to the setup of an email to be sent by a campaign or journey.	✓	✓			
WMKT	Web Marketing → Social Media → Scheduled/Posted	Social Covers: Create Post	Allows the user to create a new social media post using an account integrated with a social media account.	✓	✓	✓		
WMKT	Web Marketing → Social Media → (any)	Social Media Covers	Allows the user to view and edit existing social media posts, create new social media posts based on existing templates, and view lists of scheduled and posted social media posts.	✓	✓	✓		
RPT	Reporting → Standard Reports	Standard Reports	Allows the user to view and download reports of the organization's activity.	✓	✓			
MKTG EML	Manage Marketing → Style Sheets	Style Sheets: Delete	Allows the user to delete existing CSS files for email templates.	✓	✓			
MKTG EML	Manage Marketing → Style Sheets	Styles Module	Allows the user to view a list of existing CSS files that can be added to an email template. Allows the user to add a CSS file to an email template.	✓	✓			
MKTG EML	Manage Marketing → Style Sheets	Styles Sheets: Edit	Allows the user to create new and edit existing CSS files using a WYSIWYG editor. These files can be added to an email template.	✓	✓			
MKTG EML	Manage Marketing → Style Sheets	Styles: Access to Code Editor	Allows the user to create new and edit existing CSS files using a code editor, which can be added to an email template.	✓	✓			
OADM	Organization Admin → Groups	Teams: Collaboration Group Login (Manager Role)	Allows the user to view details for or log in as members of their collaboration teams.	✓				

Feature Key					
		help center	HLP	organization admin	OADM
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compliance	CMPL	journeys	JRN	reporting	RPT
email marketing	EML	leads & contacts	L&C	settings	STG
focused view	FV	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
OADM	Organization Admin → Groups	Teams: Collaboration Group Setup (Admin Role)	Allows the user to create and edit a collaboration team.	✓				
OADM	Organization Admin → Teams Manage Teams	Teams: Team Management (Manager Role)	Allows the user to review and modify various information associated with a user team, such as available media pieces, print orders, and loans.	✓			✓	
OADM	Organization Admin → Teams	Teams: Team Management Setup (Admin Role)	Allows the user to create a user team, assign users to that team, and designate the manager(s) of that team.	✓	✓			
HLP	Help Center → Training Resource Center	Training Resource	Allows the user access to Total Expert's Training Resource Center page.	✓	✓	✓	✓	✓
L&C	Leads & Contacts → Contacts	Transfer Contact : Create Optional Group	Allows a user who is transferring a contact to another Total Expert user to add the contact to a specified contact group in addition to the organization's standard group for transferred contacts.	✓	✓			
L&C LNS	Leads & Contacts → Contacts Loans	Transfer Loan	Allows a user to transfer ownership of a contact record to another Total Expert user even if a loan is associated with that contact. Allows a user to transfer ownership of a loan record to another Total Expert user, along with any associated contact records.	✓	✓			
STG	settings menu → (Account Settings, Email Settings, Phone Number Settings, Marketing Profile, or MLS/IDX Settings)	User Settings: Access	Allows the user to view their user account, email, and marketing profile settings.	✓	✓	✓	✓	
STG ITG	settings menu → Integration Settings	User Settings: API Integrations	Allows the user to integrate 3rd-party accounts with their Total Expert account.	✓	✓			
STG	settings menu → Account Settings	User Settings: Edit Phone Numbers	Allows the user to enter office, fax, and mobile numbers on the Account Settings page.	✓				

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focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
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Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
STG	settings menu → Marketing Profile	User Settings: Edit Profile Image	Allows the user to upload an image on the Marketing Profile page to use as the user's profile picture.	✓				
STG	settings menu → Marketing Profile	User Settings: Edit Social Media Links	Allows the user to enter links on the Marketing Profile page to specify Facebook, Twitter, Google, LinkedIn, and YouTube sites to be associated with the user.	✓				
STG	settings menu → Email Settings	User Settings: Email Property Alerts	Allows the user to select property alert options on the Email Settings page.	✓	✓	✓	✓	✓
STG	settings menu → Email Settings	User Settings: Email Signature	Allows the user to configure an email signature that can be automatically applied to any outgoing email.	✓	✓	✓	✓	✓
STG	settings menu → Marketing Profile	User Settings: Image from URL	Enables the option on the Marketing Profile page for the user to import a profile picture from the Internet.	✓				
STG PTFM	settings menu → Payment Methods Organization Admin → Manage User Budget	User Settings: Payment Methods	Allows the user to enter credit card information to use when making purchases in Total Expert. Allows the user to create an organization Stripe account, connect it with a bank account, transfer funds from the bank account to the Stripe account, and import budget allocation rules for individual users.	✓	✓	✓	✓	✓
STG	settings menu → (Account Settings or Marketing Profile)	User Settings: Write	Allows the user to edit their account or marketing profile.	✓	✓			
RPT CMPL	Reporting → (any) Compliance → (any)	User: Admin Account	Excludes media created by the user to whom this permission is applied when generating reports.	✓	✓			
PTFM	Dashboard	User: Dashboard	Allows the user to view the Dashboard page. Should be on for every user, regardless of role.	✓	✓	✓	✓	✓

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focused view	FV	leads & contacts	L&C	settings	STG
general merchandise	MRCH	loans	LNS	tasks	TSK
		manage marketing	MKTG	Web marketing	WMKT

Feature	Navigation	Permission Name	Description	User Persona (* = optional): Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
PTFM L&C	Dashboard Activity Stream Leads & Contacts → Contacts	User: Dashboard - Activity Stream	Allows the user to see the Recent Activity stream on the Dashboard and the Activity Stream option in the navigation menu. Allows the user to see the Recent Activity section on the lead details page for each lead. Should be on for every user, regardless of role.	✓	✓	✓	✓	✓
STG MKTG OADM	settings menu → Disclaimers Manage Marketing → Disclaimers	User: Disclaimers	Allows the user to create, edit and delete disclaimers for their organization and for their own user.	✓	✓			
STG	settings menu → Email Settings	User: Email Settings	Enables the Email Settings option on the settings menu.	✓				
L&C EML	Leads & Contacts → Contacts	User: Group BombBomb Integration	Allows the user to send BombBomb videos to more than one contact at a time.	✓	✓		✓	
PTFM MKTG EML	Dashboard → Marketing Dashboard → Email	User: Marketing Dashboard	Allows the user to access the Marketing and Email dashboards.	✓	✓			
STG OADM	settings menu → Account Settings Organization Admin → Users	User: New Lead Email Alerts	Allows the user to choose whether or not to receive an email alert when a new lead is shared with or assigned to them. Allows the user to choose whether or not any users in their organization should receive this type of email alert.	✓	✓	✓	✓	

Feature Key					
		help center	HLP	organization admin	OADM
campaigns	CMPN	intelligence	INT	platform	PTFM
co-marketing	CMK	integrations	ITG	print marketing	PRNT
compliance	CMPL	journeys	JRN	reporting	RPT
email marketing	EML	leads & contacts	L&C	settings	STG
focused view	FV	loans	LNS	tasks	TSK
general merchandise	MRCH	manage marketing	MKTG	Web marketing	WMKT

				User Persona (* = optional)				
Feature	Navigation	Permission Name	Description	Super Admin	Marketing Admin	Banker	Branch/Regional Manager *	API Admin
STG TSK OADM	settings menu → Account Settings Organization Admin → Users	User: New Task Email Alerts	Allows the user to choose whether or not to receive an email alert when a new task has been assigned to them. Allows the user to choose whether or not any users in their organization should receive this this type email alert.	✓	✓	✓	✓	
PTFM	n/a	User: Onboarding Intro Slides	Shows an introductory slideshow to a new user when they log in for the first time.	✓	✓	✓	✓	✓
TSK	Tasks → Recurring Tasks	User: Recurring Tasks	Allows the user to create, edit, and delete recurring tasks.	✓	✓	✓	✓	
L&C	Listings & MLS Data → MLS Searches	User: Search MLS	Allows the user to create, save, edit, or delete searches of MLS listings.	✓	✓	✓		
TSK L&C	Tasks → Tasks Leads & Contacts → Contacts	User: Tasks	Allows the user to create, edit, and delete tasks. Allows the user to view and create tasks associated with a particular lead via the contact details page for each contact.	✓	✓	✓	✓	
JRN	Journeys	User: View Teams In Org	Allows the user to add a team-specific filter to a report on a journey they have have access to.	✓	✓			
JRN	Journeys	User: View Users In Org	Allows the user to add a user-specific filter to a report on a journey they have access to.	✓	✓			
JRN	Journeys	View Journey List Page	Allows the user to see a list of all journeys they have access to (regardless of publishing status) on a single page.	✓	✓	✓		