



Total Expert Reporting Center Administrator Job Aid

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Introduction

This job aid contains applied use cases that illustrate how administrators (admins) can use the Reporting Center and its templates to generate reports that help resolve real world issues for retail mortgage organizations.

If you've opened this job aid to access setup information (including necessary user permissions and applying permissions to user roles), click [HERE](#).

Note

While Reporting Center can be enabled for all users, it is mainly suited for administrators and marketing administrators, because it provides organization-wide data access. Typically, organization would not intend this access to be enabled for managers, loan officers, or other users.

Report Templates

Reporting Center's ready-to-use templates are derived from more than 8,000 historical reporting requests.

Category	Report Templates
Audits and EBRs (Executive Business Reviews)	Email, Print, Sites State Audit Report - User License State
Co-Marketing Partners	List of LO Users and CMPs (Certified Mortgage Professionals)
Contacts	Contact Groups List with Basic Contact Level Information
	Contact Group List with Contact Count
Email	Email Template Access Settings
	Email Utilization by Template
	Email Utilization by Template, Type, Category
Journeys	Journey Access by Journey
	Journey Access by User
	Journey Contacts
Print and Social	Print and Social List
	Print and Social Utilization per Template
User Data	User Info Report



Category	Report Templates
	User Integrations
	User Login and Spoof List

Applied Use Cases

IMPORTANT: These applied use cases are written as *common customer scenarios* that can be supported using the Reporting Center.

Additionally, these use cases are written from the perspective of a Total Expert (TE) admin named Josh and a couple of colleagues who work at Voyageur Mortgage.

The Great State of Texas

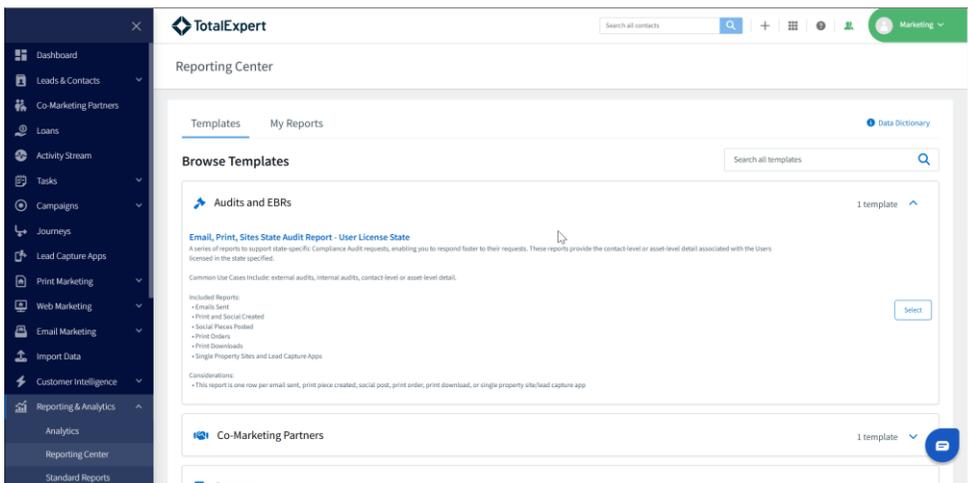
The state of Texas is conducting a routine audit of licensed mortgage activity for the past 12 months. It is requesting:

- All marketing communications sent by Texas-licensed loan officers
- Copies of print and digital marketing materials
- Documentation of sites including single property sites and lead capture tools
- Proof that activity was conducted by properly licensed individuals

Texas has given Voyageur Mortgage ten business days to respond.

Email, Print, Sites State Audit Report - User License State Report

Josh uses the *Email, Print, Sites State Audit Report - User License State* template to generate reporting. This template is found in **Audits and EBRs**.





This template requires that Josh set a start date and end date as well as select the state.

Email, Print, Sites State Audit Report - User License State

A series of reports to support state-specific Compliance Audit requests, enabling you to respond faster to their requests. These reports provide the contact-level or asset-level detail associated with the Users licensed in the state specified. Common Use Cases Include: external audits, internal audits, contact-level or asset-level detail. Included Reports: • Emails Sent • Print and Social Created • Social Pieces Posted • Print Orders • Print Downloads • Single Property Sites and Lead Capture Apps Considerations: • This report is one row per email sent, print piece created, social post, print order, print download, or single property site/lead capture app

Report Name

Email, Print, Sites State Audit Report - User License State - 03-11-2026

Starting timestamp of the audit.

Ending timestamp of the audit.

User's state.

Note: custom fields are not included in reports at this time.

Six separate reports are generated. Josh can download each report for distribution to Texas.

Email, Print, Sites State Audit Report - User License State - 03-11-2026

This report **completed** with 6 files

Created At: Mar 11, 2026
 Starting timestamp of the audit: 2025-02-01
 User's state: TX
 Ending timestamp of the audit: 2026-02-28

File Name	Rows	
Print Orders.csv	0	
Print Downloads.csv	0	
Emails Sent.csv	0	
Social Pieces Posted.csv	0	
Single Property Sites and Lead Capture Apps.csv	0	
Print and Social Created.csv	0	

Productive Comarketing Relationships

It's October, and Voyageur Mortgage's leadership team is starting to plan next year's marketing budget. One of the biggest line items in the budget? Agent events and co-marketing sponsorships.

Last year, Voyageur spent heavily on happy hours, continuing education (CE) classes, lunch-and-learns, and joint marketing campaigns with real estate agents.

Voyageurs CFO asks a fair question: "Are our co-marketing relationships actually productive? And how do we know which LOs and agents are worth investing more budget in next year?"

Josh needs data — not anecdotes!



List of LO Users and CMPs Report

Josh selects the *List of LO Users and CMPs* template (under Co-Marketing Partners) because it provides:

- Every co-marketing partner connection
- Which LO they’re connected to
- Connection status
- CMP profile completion
- One row per LO–CMP relationship

Connected CMPs by LO	Connections, Invitations, Partners	CMP Profile Completeness
<p>Review:</p> <ul style="list-style-type: none"> • Which LOs have strong partner networks? • Which LOs have only 1–2 connections? - Which LOs have none? 	<p>Filter report by and review:</p> <ul style="list-style-type: none"> • Accepted/Active connections • Pending invitations • Disconnected partners 	<p>Review:</p> <ul style="list-style-type: none"> • % complete of CMP profiles • Missing branding or contact information
<p>Data discovered:</p> <ul style="list-style-type: none"> • 20% of your LOs account for 60% of active CMP relationships. • Several branches have very low comarketing adoption. 	<p>Data discovered:</p> <ul style="list-style-type: none"> • 30% of invited CMPs never accepted their connection. • Some LOs have sent invites but never followed up. 	<p>Data discovered:</p> <ul style="list-style-type: none"> • Many CMPs are under • 70% profile complete.
	<p>Insight:</p> <p>Before spending more on events, Voyageur may need adoption coaching.</p>	<p>Insight:</p> <p>If profiles aren’t complete, cobranded marketing materials may not even be optimized — meaning you’re not maximizing value from existing partnerships.</p>

Conclusions

Instead of evenly distributing event dollars across all branches, Voyageur’s leadership team should make strategic decisions:

- Target Investment:
 - Allocate more event budget to branches with high CMP adoption.
 - Sponsor events tied to top-producing agent networks.
 - Provide additional budget to LOs actively maintaining strong CMP relationships.



- Conditional Investment:
 - Require a minimum number of active CMP connections before approving event sponsorship.
 - Tie event funding to profile completion standards.
 - Reduce Waste: Avoid investing in markets where CMP adoption is low and inactive.

Executive Summary

The executive summary that Josh presents:

Our data shows that LOs with 10+ active co-marketing partners generate 35% more production on average. However, 40% of our organization has fewer than 3 active CMP connections. We recommend prioritizing event budget toward high-adoption branches while launching a CMP activation initiative in underperforming regions.

The *List of LO Users and CMPs* report enabled budget planning that is strategic, data-backed, defensible to Finance, and aligned with production growth.

Why This Report Was the Right Report

The *List of LO Users and CMPs* report was critical because it:

- Shows the structure of every LO-agent relationship
- Quantifies adoption and engagement
- Surfaces incomplete or inactive partnerships
- Provides the foundation for productivity analysis

Without this report, Voyageur Mortgage would be planning agent events based on gut feel. With this report, Voyageur is planning agent events based on relationship strength and measurable adoption.

Evaluating and Cleaning Up a Grouping Strategy

Samantha, Marketing Operations Manager, is Josh's colleague at Voyageur Mortgage.

Over the past two years, LOs have been manually adding contacts into groups like Past Clients, Referral Partners, Pre-Approved – Shopping, and Closed 2024.

Recently, Samantha noticed inconsistent campaign performance. Some Past Clients campaigns had low engagement, and referral partner emails were going to people who clearly weren't referral partners. She suspected the contact grouping strategy had become inconsistent across users.

She needs to answer a few key questions:

- Who is actually in each group?
- Are the same types of contacts grouped consistently across loan officers?
- Are contacts sitting in multiple groups that don't make sense?
- Do we need to standardize naming conventions or restructure groups?



Contact Groups List with Basic Contact Level Information

That's when Samantha opens the *Contact Groups List with Basic Contact Level Information* template (under Contacts in Reporting Center) to a report of the same name.

Why this Report was the Right Report

Samantha is specifically looking to:

- See all contacts within a specific group
- Compare group membership across users
- Evaluate whether groups are being used consistently
- Prepare for a group cleanup and standardization effort

This report provides:

- One row per contact per group per user
- Group name
- Assigned user
- Basic contact details (so Samantha can spot mismatches quickly)

The report allows Samantha to analyze both at the individual user level and across the entire organization.

How She Uses the Report

- Filters the report by the Past Client group name, and immediately notices that some LOs added prospects who never closed, and other LOs forgot to add 2023 closings entirely
- Sorts it by user, comparing how different LOs are using the same group name, uncovering variations (e.g., Past Client, Past Clients, Closed Clients) that confirm the need for naming standardization
- Identifies overlapping groups because the report is one row per contact per group per user, meaning she can see contacts that appear in multiple related groups; she identifies contacts in both Pre-Approved – Shopping and Closed 2024,”signaling outdated group membership
- Prepares for cleanup in TE by exporting the data, creating a standardized group naming framework, plans a cleanup and re-assignment strategy, and uses existing groups to help assign new standardized groups

Outcome

After reviewing the report, Samantha:

- Standardizes group naming conventions
- Removes outdated or redundant groups
- Ensures consistent definitions across the organization
- Improves campaign targeting accuracy
- Increases engagement because the right people are now in the right groups



Key Takeaway

If you're looking to see all contacts that are in a group in order to evaluate the accuracy of your current grouping strategy, identify inconsistencies, or prepare for standardization, the *Contact Groups List with Basic Contact Level Information* report is exactly what you need. It provides a clear, contact-level view of group membership across users, making it the foundation for auditing, maintaining, and improving your group strategy.

Identify Overlapping Groups that are Targeting the Same Contacts

Voyageur Mortgage needs a high-level, structural view of group usage across the organization.

The *Contact Group List with Contact Count* report provides a strategic, birds-eye view of how groups are being used and where overlap is likely occurring. The report helps Josh spot potential overlap, sort by contact count, compare group types, identify redundant naming across users, and flag groups for deeper analysis.

If you're trying to determine where contacts may overlap across groups, start with the *Contact Groups List with Contact Count* template to generate a report that allows you to:

- Compare contact counts across similar groups
- Identify high-volume groups that may be duplicative
- See which groups are smart, editable, org-wide, or required
- Spot inconsistent group creation across users

Because the report is one row per user per group, it provides the structural visibility needed to detect potential overlap — before moving into deeper contact-level analysis.

The *Contact Group List with Contact Count* report is the strategic first step in cleaning up and standardizing your group strategy.

Are the Right People using the Right Templates and only the Right Templates?

Recently, an LO used a template that wasn't fully approved for their region. It triggered a compliance review. Voyageur Mortgage needs a complete access map.

The *Email Template Access Settings* template generates three reports:

- *Email Template Access Settings* report provides a high-level inventory that shows how each template is configured
- *Email Utilization by Template* report answers:
 - Which teams have access to which templates
 - Are regional teams restricted appropriately?
 - Are any teams missing access to required templates?



- *Email Utilization by Template, Type, Campaign* report details:
 - Which individual users have special access
 - Any legacy permissions from former team structures
 - Individual overrides that exist that bypass team-level settings

Using the reports, Voyager Mortgage can align access levels to company policy:

- Remove unnecessary individual overrides
- Ensure compliance-required templates are organization-level
- Restrict specialty templates to appropriate teams
- Document approval flows and recipient count rules for audit readiness

When should Someone use these Reports?

- Review who has access to what templates
- Prepare for a compliance audit
- Restructure teams or onboarding new branches
- Optimize template access at the organization, team, or user level
- Review transaction settings, approval flows, or recipient count approvals
- Look for access that may be misaligned or outdated

Print and Social Utilization

Voyager Mortgage's Marketing leader wants to evaluate the usage of the current print and social template library to identify what's being actively used, what's underperforming, and where to invest in creating more high-performing assets.

Print and Social Utilization per Template Report

The *Print and Social Utilization per Template* report:

- Includes one row per print or social template
- Covers all templates in the library
- Provides usage statistics within a selected date range, determined by the starting and ending timestamps

Use this Report To

- Identify the top-performing templates driving engagement and adoption
- Analyze usage trends by tags and folders
- Detect stagnant or unused templates that may need optimization or retirement
- Make data-driven decisions about what content to scale, refresh, or sunset

This visibility enables Voyager to focus resources on creating more of what users are actually leveraging, ensuring that the template library remains relevant, efficient, and aligned with user demand.



User Info Report

Voyageur Mortgages needs visibility into which users actually have those links populated in their Marketing Profile. So, Marketing wants to see which users in TE have social media links stored in their marketing profile before adding dynamic references for social media links (e.g., LinkedIn, Facebook, Instagram, etc.) into email templates.

The *User Info Report* (User Data templates) provides a comprehensive view of all users and their associated account settings and marketing profile information.

Because this report is structured as one row per user, it allows Voyageur to easily:

- Validate which users have social links populated
- Identify missing or incomplete social profile data
- Assess overall data quality before launching campaigns
- Avoid rendering issues caused by empty dynamic fields

Acceptance Criteria

- The *User Info Report* includes fields for all available social media links stored in the Marketing Profile
- The report clearly indicates which users have populated versus blank social link fields
- Marketers can export and filter the report to identify users missing required social links
- The report remains structured as one row per user

Audit Users Signing in on Behalf of Others (Spoofing)

Voyageur Mortgage Compliance leadership wants to see which users in TE regularly sign in on behalf of other users in order to:

- Monitor spoofing activity
- Ensure appropriate usage
- Identify potential risk or process gaps

User Login and Spoof List Report

In some cases, users (e.g., admins, managers, support staff) sign in on behalf of other users to complete job-related tasks. While this can be operationally necessary, regular spoofing activity should be monitored for compliance, security, and process improvement purposes.

The *User Login and Spoof List* report captures all login and spoof events within the organization, including key details about:

- The user initiating the login or spoof
- The user being spoofed
- Date and time of the event
- Frequency of spoof activity

Since the report is structured as one row per login or spoof event, it allows for detailed auditing and trend analysis.



How Will this Report Help?

- Identify users who frequently sign in on behalf of others
- Monitor unusual or excessive spoofing behavior
- Understand when and how often spoofing occurs
- Support compliance reviews and internal policy enforcement
- Evaluate whether additional training or process changes are needed

Acceptance Criteria

- The User Login and Spoof List report includes all login and spoof events.
- The report clearly distinguishes between standard logins and spoof events.
- The report captures both the initiating user and the spoofed user.
- Users with frequent spoofing activity can be identified through filtering or aggregation.
- The report remains structured as one row per login or spoof event.
- The report can be exported for compliance review and auditing purposes.

Audit Facebook Integration Connections Post-Onboarding

Voyageur Mortgage's Operations leadership wants to see which users in the TE platform have connected their Facebook integration since their onboarding concluded. Why? So that Operations knows that LOs have completed their Facebook credential setup and are properly configured for social engagement and marketing activities.

User Integrations Report

During onboarding, Los were asked to enter their Facebook credentials to connect their account within the platform. A few months later, we need visibility into who has successfully connected Facebook and who has not.

The *User Integrations Report* captures integration connection status for users in the organization. Since the report is structured as one row per integration per user, it allows us to specifically filter for the Facebook integration and audit connection status at the individual level.

How Will This Report Help?

- Identify which users have an active Facebook integration connected
- Surface users who never connected or whose integration is disconnected
- Measure Facebook adoption post-onboarding
- Support targeted follow-up with users missing the required integration

Acceptance Criteria

- The User Integrations Report includes Facebook as a listed integration.
- The report clearly indicates Facebook connection status per user.
- Users without an active Facebook integration can be easily filtered and identified.
- The report remains structured as one row per integration per user.
- The report can be exported for follow-up and tracking purposes.



Cost-Split Review, Print and Social List

The Compliance Team wants visibility into the cost-splits associated with all print pieces in TE so that they can ensure accurate cost allocation, proper disclosures, and adherence to regulatory requirements.

Print and Social Report

Josh runs the *Print and Social List* report, which provides a comprehensive view of all print and social templates within the library, including folders, tags, and basic settings information.

The report:

- Includes one row per print or social template
- Covers all print and social templates in the library
- Displays cost-split configurations associated with print templates
- Provides visibility into folders, tags, and template settings
- Allows identification of expiring templates

With this report, the Compliance Team can:

- Review and validate cost-split structures across all print materials
- Ensure appropriate financial attribution and regulatory alignment
- Identify templates that may require cost-split adjustments
- Audit the overall library for governance, organization, and lifecycle management

This ensures transparency, reduces compliance risk, and supports proactive monitoring of print asset configuration across the organization.

Measuring Early Momentum

Josh just launched a brand-new Homebuyer Education Journey.

It was a big lift with carefully written emails, smart delays, task reminders for LOs, and two types of entry points:

- Automatic onramps (application started, pre-approval issued)
- Manual LO intervention (adding a contact directly)

The journey went live 30 days ago.

Now Josh has one big question: “Is this working the way we expected?”

Journey Contacts

Instead of guessing, Josh pulls the *Journey Contacts* report and filters for contacts onboarded within the last 30 days. Immediately, the data tells a story.



Step 1: Are We Gaining Traction?

The first thing Josh looks at: Total number of contacts onboarded in the first month

The number is strong. The journey is gaining adoption. But volume alone doesn't explain why.

Step 2: What's Driving Entry?

Because this report shows one row per contact per journey trigger, Josh can see exactly how each contact entered the journey. A pattern emerges:

- 70% were triggered automatically when a pre-approval milestone was completed
- 20% were added manually by LOs
- 10% entered via a task outcome trigger

That insight is powerful. It confirms:

- The automatic onramps are functioning as designed
- Loan officers are actively participating
- The workflow integration is influencing behavior

If most contacts had been manually added, it might indicate the automation wasn't firing properly. If no LOs were adding contacts, it might signal low adoption. But here, both automation and user behavior are contributing.

Step 3: Are Contacts Progressing?

The report also shows the last event for each contact. Josh scans the data:

- How many are still active?
- How many completed?
- Did anyone exit early?
- Are they getting stuck at a specific step?

A small cluster of contacts shows the same last event. They haven't moved forward in two weeks. That signals something to review:

- Is there a delay too long?
- Is a task not being completed?
- Is a trigger condition too restrictive?

This is early-warning intelligence, just one month in.

Step 4: LO Engagement Signals

Since the report includes trigger types and task-related outcomes, Josh can also see:

- Which LOs are actively using task outcomes to move contacts forward
- Who is relying fully on automation
- Where coaching opportunities may exist



Instead of waiting for quarterly results, Josh now has first-month adoption and performance data.

The Outcome

After reviewing the *Journey Contacts* report, Josh knows:

- How many contacts were onboarded in the first month
- What percentage came from automation vs. LO intervention
- Where contacts are currently sitting in the journey
- Whether any friction points need adjusting
- Which users are actively engaging with the journey

The journey hasn't just been published. It's already being measured, optimized, and improved - because early success isn't just about launching. It's about understanding what's driving momentum and making adjustments while it still matters.

Taking the Keys to the Journey Kingdom

When Josh's colleague Raoul stepped into the role of Marketing Automation Manager at Voyageur Mortgage, there was no formal handoff. No documentation. No clean spreadsheet. No "source of truth."



Just one statement from leadership: You own journeys now

Raoul logs into TE and immediately realizes the challenge: There are dozens of journeys in the library, but which ones are actually active? And who has access to what?

Journey Access by User report (Journeys templates)

Instead of clicking into each journey one by one, Raoul pulls the *Journey Access by User* report.



Step 1: Who Has Access to What?

The report displays one row per user per journey. This is exactly what Raoul needs. Instead of looking at journeys in isolation, he can now see:

- Every user
- Every journey they have access to
- How widely journeys are distributed across the organization

Patterns start to emerge. Some loan officers have access to 15+ journeys. Others have access to only 2. A few high-performing LOs aren't enabled on key nurture tracks at all. That's a gap.

Step 2: Identifying Over- and Under-Enablement

Raoul notices something else:

- The Post-Close Referral Builder journey is enabled for nearly every LO
- The Builder Partner Campaign is enabled for only one branch

Was that intentional? Or did no one roll it out?

Because the *Journey Access by User* report excludes journeys with no access granted, Raoul knows: If it's in the report, someone is actively enabled. This helps narrow focus to what's truly live in the field.

Step 3: Contact Volume Clues

By reviewing contact counts by journey at the user level, Raoul quickly assesses:

- Which users are actively running contacts through journeys
- Which users have access but aren't leveraging that access
- Which journeys are heavily adopted versus lightly used

One branch stands out. It has access to multiple journeys, but very low contact activity. That signals a training opportunity.

Step 4: Cleaning House

Raoul also discovers:

- Journeys enabled for former employees
- Duplicate access across test journeys
- Old campaigns still technically active



Here's the plan:

- Remove unnecessary access
- Standardize which journeys each role should have
- Identify core journeys that should be universally enabled
- Sunset outdated campaigns

The Outcome

Within one report, Raoul has:

- A clear view of active journeys in use
- Visibility into user-level enablement
- Insight into adoption and engagement
- A roadmap for governance and cleanup

What started as “I have no idea what’s going on” turns into structured oversight. Because managing journeys isn’t just about building them. It’s about knowing:

- Who has access
- Who’s using them
- And whether they’re aligned with strategy

And now, Raoul finally has control of the journey ecosystem.

Finding the Journeys that Actually Move the Needle

Over the past two years, the Marketing team at Voyageur Mortgage has built dozens of journeys: first-time homebuyer nurture tracks, refinance campaigns, realtor follow-ups, post-close check-ins, and more.

On paper, it looks impressive. But Josh has a nagging question: Are we building journeys... or are we building results?

Journey Access by Journey Report

Josh runs the *Journey Access by Journey* report to get clarity. Right away, hhe sees a full list of every journey in their library, each represented by a single row. Clean. Simple. No noise. Josh scans the data:

- Which journeys have the highest contact counts?
- Which ones are enabled across the most users?
- Which are just sitting there?



The Standouts

A few patterns emerge. These are their top-performing, most-adopted journeys:

- The *New Purchase Nurture* journey has the highest contact volume and is enabled across nearly every loan officer. No surprise, it's their bread and butter.
- The *Realtor Partner Anniversary* journey is also widely enabled and steadily growing in contacts. That's a great sign of adoption.

The Hidden Gaps

Then Josh notices something surprising.

- The *VA Loan Education Series* journey (one the team spent weeks building) is only enabled for three users.
- The *Refi Reactivation 2022* journey hasn't added meaningful contacts in months.

Now Josh has insight:

- One journey needs better internal promotion
- Another journey may need refreshing or retirement

The Action Plan

With one report, Josh can now:

- Review user access to journeys
- Identify which journeys are most widely enabled
- Compare contact counts by journey
- Spot stagnant or stale campaigns
- Decide which journeys to optimize, relaunch, or sunset

Instead of guessing, he's prioritizing based on visibility and adoption. Because the most successful journeys aren't just the ones that exist. They're the ones that are enabled, adopted, and actively engaging contacts



Set up Reporting Center

Organization Setting	Not applicable
API Information	Not applicable

User Permissions

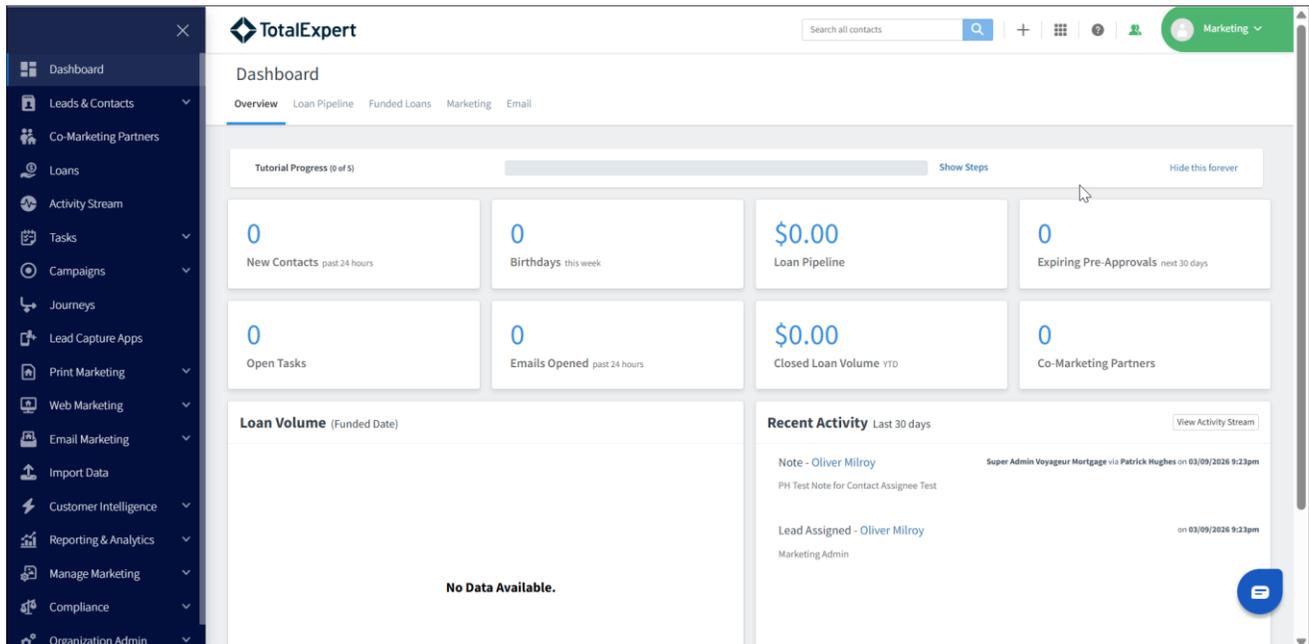
Users must have these permissions assigned to their role to access Reporting Center:

Download Custom Reports	<ul style="list-style-type: none"> DownloadCustomReports ID: 738 	Allows the user to access secure reports that belong to the organization the user is authenticated with.
Reporting Center	<ul style="list-style-type: none"> ReportingCenter ID: 753 	Allows the user to access Reporting Center by navigating to Reporting & Analytics > Reporting Center in TE.

Apply Permissions to Roles

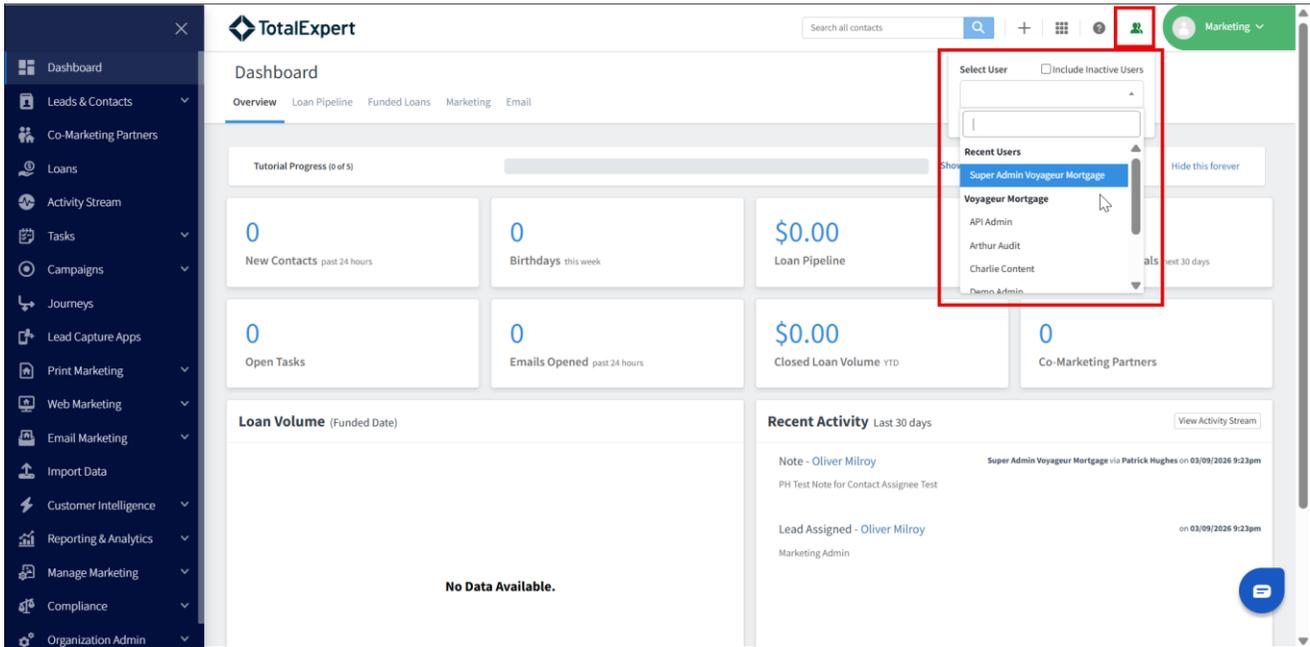
1. Log in to TE as yourself.

You must be an admin to complete this procedure.

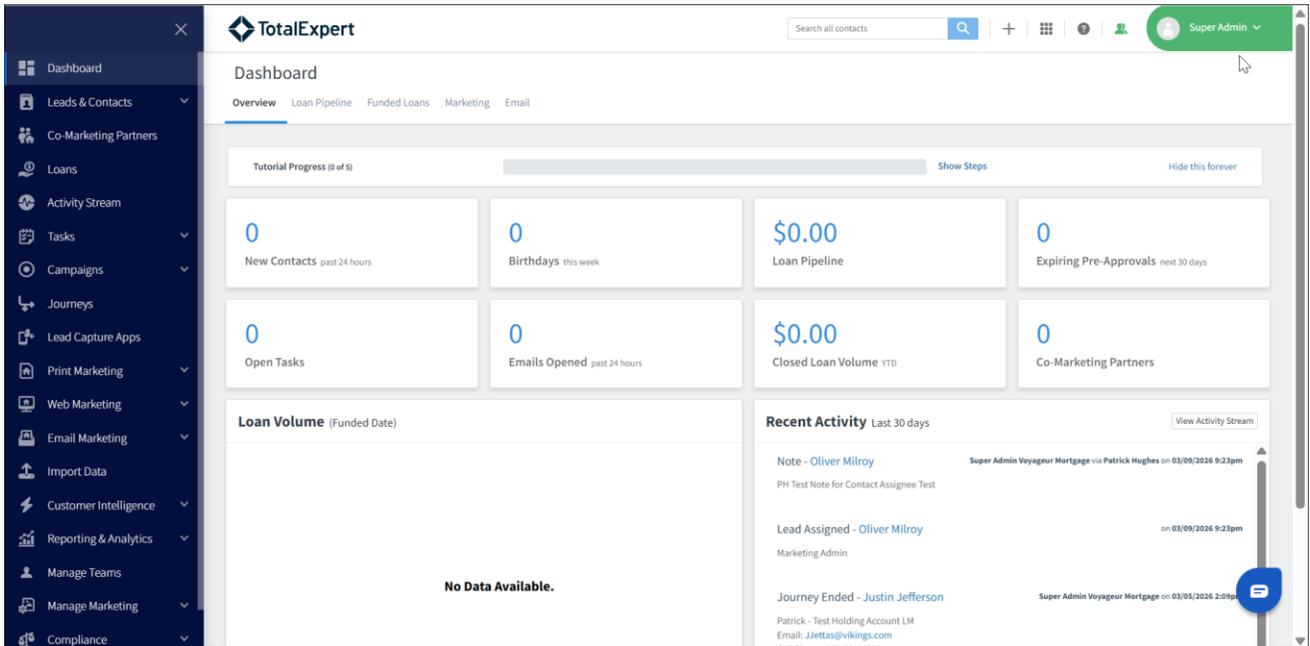




2. Select **Switch Account**, select the down arrow, then select the super admin account.



You're logged in as the Super Admin.





3. Select **Organization Admin**, then select **User Roles**.

The screenshot shows the TotalExpert dashboard interface. On the left, a dark blue navigation sidebar contains various menu items. 'Organization Admin' is highlighted with a red box, and its sub-menu 'User Roles' is also highlighted with a red box and a mouse cursor. The main dashboard area shows a 'Dashboard' header with tabs for Overview, Loan Pipeline, Funded Loans, Marketing, and Email. Below the header are four summary cards: 'Open Tasks' (0), 'Emails Opened' (0, past 24 hours), 'Closed Loan Volume YTD' (\$0.00), and 'Co-Marketing Partners' (0). A 'Loan Volume (Funded Date)' chart area displays 'No Data Available.'. To the right, a 'Recent Activity' section shows a list of events, including 'Note - Oliver Milroy', 'Lead Assigned - Oliver Milroy', 'Journey Ended - Justin Jefferson', and 'Journey Triggered - Justin Jefferson', each with associated user and timestamp information.

A list of user roles is displayed.

The screenshot displays the 'User Roles' list in TotalExpert. The interface includes a '+ Add Role' button at the top left and a search bar for 'Search Role or Organization Name' at the top right. The list contains seven entries, each with a checkbox, a 'Name' column, and an 'Organization Name' column. The roles listed are Admin, API Admin, Audit Admin, Loan Officer, Loan Officer Assistant (Licensed), Loan Officer Assistant (Not Licensed), and Marketing. All listed roles are associated with the 'Voyageur Mortgage' organization. The bottom of the list indicates 'Showing 1 to 7 of 7 entries'.

<input type="checkbox"/>	Name	Organization Name
<input type="checkbox"/>	Admin	Voyageur Mortgage
<input type="checkbox"/>	API Admin	Voyageur Mortgage
<input type="checkbox"/>	Audit Admin	Voyageur Mortgage
<input type="checkbox"/>	Loan Officer	Voyageur Mortgage
<input type="checkbox"/>	Loan Officer Assistant (Licensed)	Voyageur Mortgage
<input type="checkbox"/>	Loan Officer Assistant (Not Licensed)	Voyageur Mortgage
<input type="checkbox"/>	Marketing	Voyageur Mortgage

There are three admin roles listed: Admin, API Admin, and Audit Admin. In this example we'll enable user permissions for the Admin role.



4. Select the checkbox for **Admin**, then select **Update Selected**.

	Organization Name
<input checked="" type="checkbox"/> Admin	Voyageur Mortgage
<input type="checkbox"/> API Admin	Voyageur Mortgage
<input type="checkbox"/> Audit Admin	Voyageur Mortgage
<input type="checkbox"/> Loan Officer	Voyageur Mortgage
<input type="checkbox"/> Loan Officer Assistant (Licensed)	Voyageur Mortgage
<input type="checkbox"/> Loan Officer Assistant (Not Licensed)	Voyageur Mortgage
<input type="checkbox"/> Marketing	Voyageur Mortgage

Role Settings and Permissions are displayed.

Role Settings

Name * Admin

User Role Classifications * Admin

Customer Segment * Retail Mortgage

Permissions

Name	Grant Access
Access Controlled Item Settings	<input checked="" type="checkbox"/>
Access Items Templates	<input checked="" type="checkbox"/>
Advanced Pricing Engine Options	<input checked="" type="checkbox"/>
Analytics Dashboard Customer Intelligence Attribut	<input type="checkbox"/>
Analytics: Base Access	<input type="checkbox"/>
Blocks: View Basic Gallery	<input type="checkbox"/>
Blocks: View Expert Content Gallery	<input type="checkbox"/>
Blocks: View Organization Content Gallery	<input type="checkbox"/>



5. Scroll through the alphabetized permissions list until you see **Download Custom Reports**. Select the permission's checkbox to select the permission.

The screenshot shows the 'Role Settings and Permissions' interface in TotalExpert. On the left, a sidebar lists various system areas. The main area is divided into two panes. The left pane shows a list of roles, with 'Admin' selected. The right pane, titled 'Submit', displays a list of permissions. The 'Download Custom Reports' permission is highlighted with a red rectangular box, and its checkbox is checked. Other permissions listed include 'Customer Intelligence: User', 'Daily Digest Email', 'Data Importer: Administrator', 'Data Importer: Feature', 'Data Importer: Import Leads', 'Data Importer: Recurring Import Reports', 'Data Importer: User', 'Delete Template', 'Edit Lead Email When Opted-Out', 'Email Marketing: Add Template', 'Email Marketing: Append Signature', 'Email Marketing: Cancel Send', 'Email Marketing: Compliance Notification Settings', 'Email Marketing: Email and Campaign Library', 'Email Marketing: Email Lead', 'Email Marketing: Email Library', and 'Email Marketing: Statistics'.

6. Continue to scroll through the permissions list until you see **Report Center**. Select the permission's checkbox to select the permission, then select **Submit**.

The screenshot shows the 'Role Settings and Permissions' interface after the 'Submit' button was clicked. A green success message 'Success' is displayed in a box at the top of the main content area, highlighted with a red rectangular box. The role 'Admin' is still selected, and the permissions list is visible. The interface also shows a search bar for contacts, a search bar for roles or organization names, and a 'Reset' button. The user is identified as 'Super Admin'.

Role Settings and Permissions are closed, and a **Success** message is displayed. Users who have the Admin role now have access to Reporting Center.