



Reporting Center Data Dictionary

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Introduction

The information presented in the following sections corresponds to the collapsible sections on the Reporting Center page of Total Expert. Navigate to **Reporting & Analytics → Reporting Center** to view this page, then expand each section to see the templates in that section. The templates you can use to create reports there are described in the corresponding sections below.



For any template, click the **Select** button to open a box where you can provide a name for your report before triggering it to begin. Some templates also have parameters to select, such as a date range. Any parameters of this type are described in a Parameters table in the corresponding sections below.



Each template returns a report that includes 1 or more files. You can view these results by clicking the **My Reports** tab on the Reporting Center page. Click the name of a completed report to open a box where you can download any files associated with that report. A listing of the columns included in each output file is provided in the corresponding sections below.

Tags listed with each template can help you filter the list via the search tool on the Reporting Center page to help you find that template.

Audits and EBRs

This section has the following templates:

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

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

This template includes a series of reports that support state-specific compliance audit requests, enabling you to respond faster to these requests. These reports provide the contact-level or asset-level detail associated with the users licensed in the state you specify in the parameters.

Common use cases include: external audits; internal audits; finding contact- and asset-level detail

The reports in this template include 1 row per email sent, print piece created, social post, print order, print download, or single property site/lead capture app.

Included Reports

- Emails Sent
- Print and Social Created
- Social Pieces Posted
- Print Orders
- Print Downloads
- Single Property Sites and Lead Capture Apps

Tags

- Audit
- Email
- Print
- Social
- Sites

Parameters

Parameter	Description	Data Type
audit_start_time	Starting timestamp of the audit.	timestamp
audit_end_time	Ending timestamp of the audit.	timestamp
audit_state	User's state	string



Report Files

Emails Sent

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
state
user_licenses
user_teams
email_id
email_name
subject
email_type
campaign_id
campaign_name
email_file
recipient_lead_id
recipient_f_name
recipient_l_name
recipient_email
recipient_state
send_date
is_sent
is_delivered
is_opened
open_count
opened_date
link_clicked
link_clicked_date
link_clicked_url
is_failed
is_suppressed
is_bounced
is_unsubscribed
is_complained

TOTAL EXPERT



Print and Social Created

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
state
user_licenses
user_teams
media_id
media_status
media_name
media_type
saved_media_name
saved_media_status
URL
created_on

Social Pieces Posted

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
state
user_licenses
user_teams
media_id
media_status
media_name
media_type
saved_media_name



Columns
post_message
post_date
removal_date
on_network
network_posted_to
preview_image

Print Orders

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
state
user_licenses
user_teams
media_id
media_status
media_name
media_type
TE_order_id
comarketer_org_id
comarketer
comarketer_same_org
print_vendor
cost_share
order_quantity
user_charge
comarketer_charge
final_total_cost
order_date
TE_sku
printer_sku
order_status
preview_pdf



Print Downloads

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
state
user_licenses
user_teams
media_id
media_name
media_type
media_status
download_type
downloaded_at
preview_pdf

Single Property Sites and Lead Capture Apps

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
state
user_licenses
user_teams
site_id
site_name
template_name
template_type
status
created_on



Columns
mls_number
views
leads_created
site_link

Co-Marketing Partners

This section has the following templates:

- List of LO Users and CMPs

List of LO Users and CMPs

This template includes a report of co-marketing partners (CMPs) and their profile information, including connection status and associated users in the organization.

Common use cases include: finding count of connected CMPs by LO, connection status, incomplete CMP profile details, and completion percentage of CMP profiles

This report includes 1 row per co-marketing partner connection.

Tags

- Co-Marketing
- Users
- Partners
- LoanOfficers

Report File

List of LO Users and CMPs

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
user_teams
Comarketing_Connection_Status
connection_sent_at
agent_user_id



Columns
agent_f_name
agent_l_name
agent_email
agent_user_status
agent_mls_network
agent_mls_number
agent_website
agent_company
agent_job_title
agent_testimonial_website
agent_address
agent_address_2
agent_city
agent_state
agent_zip
agent_cost_center
agent_location_id
agent_phone_cell
agent_phone_office
agent_phone_fax
agent_timezone
agent_license
agent_disclaimer
agent_web_disclosure_text
agent_bio
agent_facebook
agent_twitter
agent_google
agent_linkedin
agent_youtube
agent_application_url
agent_short_name
agent_org_logo
agent_team_logo
agent_profile_image
agent_profile_completion_percentage
f_name_completed
l_name_completed
company_completed
address_completed
city_completed
state_completed
zip_completed
job_title_completed
phone_cell_completed



Columns
phone_office_completed
timezone_completed
mls_agent_id_completed
mls_network_completed
profile_img_completed
logo_img_completed

Contacts

This section has the following templates:

- Contact Groups List with Basic Contact Level Information
- Contact Groups List with Contact Count

Contact Groups List with Basic Contact Level Information

This template includes a report of all contacts in each group for each user. It also contains basic user and contact information details.

Common use cases include: finding individual contacts in a specific group in a user or across the organization; assigning new groups based on existing groups; standardizing and maintaining groups

This report includes 1 row per contact per group per user.

Tags

- Contacts
- Leads
- Groups
- Export

Report File

Contact Groups List with Basic Contact Level Information

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
user_teams



Columns
contact_id
f_name
l_name
email
address
address_2
city
state
zip
phone_cell
phone_home
phone_office
lead_source
creation_date
group_id
group_name
contact_added_to_group_at
group_description
user_editable
smart_group
org_wide_group
required_group

Contact Groups List with Contact Count

This template includes a report of users and their associated groups, with a count of contacts for each group. It also indicates whether a group is editable, a smart group, an organization-wide group, or a required group.

Common use cases include: determining type of groups, editability of groups, unused or most frequently used groups; standardizing and maintaining groups

This report includes 1 row per user per group.

Tags

- Contacts
- Leads
- Groups

Report File

Contact Groups List with Contact Count

Columns
organization_id
org_name
user_id
user_external_id



Columns
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
user_teams
group_id
group_name
group_description
user_editable
smart_group
org_wide_group
required_group
group_created_at
contact_count

Email

This section has the following templates:

- Email Template Access Settings
- Email Utilization by Template
- Email Utilization by Template, Type, Campaign

Email Template Access Settings

This template includes a set of reports that capture email templates and their associated settings and access type (organization, team, or user level).

Common use cases include: reviewing a complete list of email templates and associated settings (transaction, approval flow, recipient count approval); reviewing existing access; optimizing and maintaining access at user, team, and organization levels

Included Reports

- Email Team Settings – includes 1 row per team per email template
- Email Template Settings – includes 1 row per email template
- Email User Settings – includes 1 row per user per email template

Tags

- Email
- Users
- Teams
- Templates



- Settings

Report Files

Email Team Settings

Columns
organization_id
org
owner_user_id
owner_user
owner_user_email
owner_user_role
email_id
email_name
email_subject
email_created_at
email_updated_at
email_folders
email_tags
email_file
is_transactional
team_id
team_name
priority
allow_access
connection_access
allow_edit
recipient_count_approval_threshold
approval_flow_id
approval_flow
settings_created_at
settings_updated_at

Email Template Settings

Columns
organization_id
org
owner_user_id
owner_user
owner_user_email
owner_user_role
email_id
email_name
email_subject
email_created_at
email_updated_at



Columns
email_folders
email_tags
email_file
is_transactional
allow_access
connection_access
allow_edit
recipient_count_approval_threshold
approval_flow_id
approval_flow
settings_created_at
settings_updated_at

Email User Settings

Columns
organization_id
org
owner_user_id
owner_user
owner_user_email
owner_user_role
email_id
email_name
email_subject
email_created_at
email_updated_at
email_folders
email_tags
email_file
is_transactional
user_id
user
user_email
user_role
allow_access
connection_access
allow_edit
recipient_count_approval_threshold
approval_flow_id
approval_flow
settings_created_at
settings_updated_at



Email Utilization by Template

This template includes a report of all email templates in your library and template-level usage statistics.

Common use cases include: identifying the top templates used; managing tags and folders; identifying stagnant or unused templates

This report includes 1 row per email template. This report includes all email templates in your library. The starting and ending timestamps determine the time range of the usage statistics.

Tags

- Email
- Templates
- Utilization

Parameters

Parameter	Description	Data Type
send_date_start_time	Starting timestamp of the email send date range.	timestamp
send_date_end_time	Ending timestamp of the email send date range.	timestamp

Report File

Email Utilization by Template

Columns
organization_id
org_name
owner_user_id
owner_user
owner_user_email
owner_user_role
email_id
email_name
email_subject
email_description
is_transactional
skip_dedupe
email_created_at
email_updated_at
email_deleted_at
email_folders
email_tags
email_file
first_send_date
last_send_date
users_that_sent
emails_sent



Columns
emails_delivered
emails_opened
email_clicks
emails_failed
emails_suppressed
emails_bounced
emails_unsubscribed
emails_complained

Email Utilization by Template, Type, Campaign

This template includes a report of all email templates in your library and template-level usage statistics, further broken down by campaign type and campaign.

Common use cases include: identifying top templates used by campaign and campaign type; identifying stagnant and unused templates

This report includes 1 row per email template per campaign. It does not include templates that were not sent in the timeframe specified. The starting and ending timestamps determine the time range of the usage statistics.

Tags

- Email
- Templates
- Utilization
- Campaigns

Parameters

Parameter	Description	Data Type
send_date_start_time	Starting timestamp of the email send date range.	timestamp
send_date_end_time	Ending timestamp of the email send date range.	timestamp

Report File

Email_Utilization_by_Template-Type-Campaign

Columns
organization_id
org_name
owner_user_id
owner_user
owner_user_email
owner_user_role
email_id
email_name
subject
email_type



Columns
campaign_id
campaign_name
email_description
email_created_at
email_updated_at
email_deleted_at
email_folders
email_tags
email_file
first_send_date
last_send_date
users_that_sent
emails_sent
emails_delivered
emails_opened
email_clicks
emails_failed
emails_suppressed
emails_bounced
emails_unsubscribed
emails_complained

Journeys

This section has the following templates:

- Journey Access by Journey
- Journey Access by User
- Journey Contacts

Journey Access by Journey

This template includes a report of all journeys in your library and journey-level access statistics.

Common use cases include: reviewing user access to journeys; identifying top journeys enabled, contact counts by journey, and stagnant or stale journeys

This report includes 1 row per journey.

Tags

- Journeys
- Access
- Users



Report File

Journey Access by Journey

Columns
organization_id
org
journey_id
journey_name
journey_created_at
journey_updated_at
journey_owner_user_id
journey_owner_user
journey_owner_email
journey_owner_role
journey_owner_status
full_org_access
team_level_access
user_level_access
teams_with_access
num_teams_with_access
user_with_access
users_with_journey_available
users_with_journey_active
users_with_journey_inactive
journey_leads
unique_journey_leads
active_journey_leads
active_unique_journey_leads
first_contact_onboarded_at
latest_contact_onboarded_at

Journey Access by User

This template includes a report of all journeys in your library and user-level access statistics.

Common use cases include: reviewing user access to journeys; identifying top journeys enabled, contact counts by journey, and stagnant or stale journeys

This report includes 1 row per user per journey. It does not include journeys that do not have any access granted.

Tags

- Journeys
- Users
- Access



Report File

Journey Access by User

Columns
organization_id
org_name
journey_id
journey_name
journey_created_at
journey_updated_at
journey_owner_user_id
journey_owner_user
journey_owner_email
journey_owner_role
journey_owner_status
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
user_teams
journey_publish_status_for_user
published_at
unpublished_at
allow_access
allow_user_trigger_events
allow_user_end
allow_user_publish
allow_user_unpublish
allow_edit
allow_template
access_modified_at
journey_leads
unique_journey_leads
active_journey_leads
active_unique_journey_leads
first_contact_onboarded_at
latest_contact_onboarded_at

Journey Contacts

This template includes a report of all contacts onboarded onto a journey in a specified period of time. It also includes the contact-specific onboarding trigger and last event for each instance of the contact.



Common use cases include: determining number of contacts onboarded, which contacts passed through a specific trigger or event, which contacts passed through specific journey statuses, and how LOs are using task outcomes

This report includes 1 row per contact per journey trigger.

Tags

- Journeys
- Contacts
- Leads

Parameters

Parameter	Description	Data Type
journey_onboard_start_time	Starting timestamp for contacts onboarded to journey.	timestamp
journey_onboard_end_time	Ending timestamp for contacts onboarded to journey.	timestamp

Report File

Journey Contacts

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
user_teams
contact_id
contact_f_name
contact_l_name
contact_email
journey_id
journey_name
journey_lead_id
journey_started_at
journey_ended_at
trigger_name
trigger_description
most_recent_event_name
most_recent_event_description
most_recent_event_time



Print and Social

This section has the following templates:

- Print and Social List
- Print and Social Utilization per Template

Print and Social List

This template includes a report of all print and social templates in your library with folders, tags, and basic settings information.

Common use cases include: reviewing your library, tags, folders, cost splits, and expiring templates

This report includes 1 row per print or social media template. It includes all print and social media templates in your library.

Tags

- Print
- Social
- Settings
- Templates

Report File

Print and Social List

Columns
organization_id
org
media_id
reference_number
media_status
media_name
system_name
is_comarketable
media_type
media_tags
media_folders
preview_image
approval_flow_id
approval_flow_name
allow_access
allow_comarketer_access
org_cost_share_percent
org_cost_share_user_id
cost_share_user
auto_pay_org_share



Columns
lender_cost_share
comarketer_cost_share
te_sku
printer_sku
printer_id
print_company
template_created_at
template_updated_at

Print and Social Utilization per Template

This template includes a report of all print and social media templates in your library and template-level usage statistics.

Common use cases include: determining top templates used; managing tags and folders; identifying stagnant or unused templates

This report includes 1 row per print or social media template. It includes all print and social media templates in your library. The starting and ending timestamps determine the time range of the usage statistics.

Tags

- Print
- Social
- Templates
- Utilization
- Statistics

Parameters

Parameter	Description	Data Type
media_start_time	Starting timestamp associated with the media.	timestamp
media_end_time	Ending timestamp associated with the media.	timestamp

Report File

Print and Social Utilization per Template

Columns
organization_id
org
media_id
media_name
system_name
media_type
media_status
reference_number
description



Columns
media_folders
media_tags
template_created_at
template_updated_at
template_deleted_at
preview_image
times_created
users_that_created
last_time_created
downloads
users_that_downloaded
last_downloaded
print_orders
users_that_ordered
last_print_order
print_orders_recipient_count
facebook_posts
users_posted_to_facebook
twitter_posts
users_posted_to_twitter
linkedin_posts
users_posted_to_linkedin
instagram_posts
users_posted_to_instagram
last_post_date

User Data

This section has the following templates:

- User Info Report
- User Login and Spoof List

User Info Report

This template includes a report of all users in your organization and their associated information, such as commonly requested account settings and marketing profile information.

Common use cases include: validating data; identifying missing data; understanding notifications enabled by the user

This report includes 1 row per user.

Tags

- Users



Report File

User Info Report

Columns
organization_id
org
user_id
external_id
username
email
user_status
user_role_id
user_role
user_type
last_login
created_on
last_modified
tcpa_disclaimer_accepted_date
org_threshold_approver_user_id
org_threshold_approver_name
user_sku
saml_subject_id
latest_activation_date
latest_deactivation_date
job_title
f_name
l_name
company
website
testimonial_website
phone_home
phone_cell
phone_office
phone_fax
address
address_two
city
state
zipcode
timezone
timezone_name
cost_center
location_id
custom_ad_placement_compliance_ack_date
collab_approval
preferred_dialer_setting



Columns
user_licenses
user_teams
disclaimer
license_title
agent_bio
social_facebook
social_twitter
social_google
social_youtube
social_linkedin
web_disclosure_text
agent_logo_img
application_url
post_close_survey_url
short_name
spend_limit_week
spend_limit_day
icon_one_img
icon_two_img
icon_three_img
user_quote
wistia_id
team_profile_img
award_one_img
award_two_img
qr_code_img_one
qr_code_img_two
banner_one_img
banner_two_img
social_instagram
social_tiktok
social_whatsapp
social_custom_one
social_custom_two
reviews_google
reviews_facebook
reviews_zillow
reviews_yelp
reviews_custom
vanity_url
appointment_scheduling_url
referral_url
customer_portal_url
mobile_app_download_url
bill_pay_url



Columns
file_claim_url
team_name
team_tagline
current_promotions
veteran_status
designations
languages
insurance_companies_represented
insurance_plans_offered
receive_daily_digest
receive_new_task_alerts
receive_email_lead_notifications
receive_text_lead_notifications
receive_print_order_reminders
receive_comarketed_new_listing_alerts
receive_comarketed_pending_listing_alerts
org_logo_image
team_logo_image
profile_image

User Integrations

This template includes a report capturing common integrations for users in your organization.

Common use cases include: auditing user integrations

This report includes 1 row per integration per user.

Tags

- Users

Report File

User Integrations

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id



Columns
user_teams
integration_name
date_added

User Login and Spoof List

The report in this template returns a list that captures all logins and spoofs by users in your organization. It also captures key details related to the user logging in and the spoofed user.

Common use cases include: auditing user logins to drive engagement; reviewing for unusual login activity; understanding where, when, and frequency of spoofing

This report includes 1 row per login or spoof event.

Tags

- Users
- Logins
- Spoofing

Parameters

Parameter	Description	Data Type
login_range_start_time	Starting date of report range.	timestamp
login_range_end_time	Ending date of report range.	timestamp

Report File

User Login and Spoof List

Columns
organization_id
org_name
user_id
user_external_id
user_f_name
user_l_name
user_email
user_role
user_status
cost_center
location_id
user_teams
action_type
action_performed_on
spoofed_into_user_id
spoofed_into_user_name
spoofed_into_user_email



Columns

spoofed_into_user_role