



Managing Users

Table of Contents

Introduction	1
Creating a New User.....	2
Account Settings	2
Profile.....	2
Address	2
Team	3
Business Unit.....	3
Contact Information.....	3
Notification Settings	3
Reset Password	4
3 rd Party Source Settings.....	4
Email Settings	4
Marketing Profile.....	5
Account Images	5
Print Media Settings	5
Threshold Settings	5
Post Close Survey Link	5
Social Media Settings	5
Web Media Settings.....	6
Web Content.....	6
MLS/IDX Settings	6
Editing an Existing User	6
Bulk Edit Options	7
Activating and Deactivating Users	8
Logging in on Behalf of Another User.....	8

Introduction

Administrators with appropriate permissions in Total Expert can quickly create and edit user accounts to keep up with changes in their organization. They can also activate and deactivate accounts to ensure that exactly the right people have access to company data and materials.



Everything covered below begins by navigating to your organization's Users page at **Organization Admin → Users**.

Creating a New User

When a new user joins your organization, you can create an account for them from the Users page by clicking the **+Add User** button at the top of the page and filling out the form, which is broken into the following tabs:

- Account Settings
- Email Settings
- Marketing Profile
- MLS/IDX Settings

On the Account Settings tab, you must enter the new user's first name, last name, and email address and select a user role and status (active or inactive). All the other settings are optional, but the more information you provide will give the user a more robust experience, especially in regard to information that can be automatically added to marketing materials.

Warning

When you are finished setting up the user, you must click the **Save User** button in the upper-left corner of the page to create the new user account. If you navigate away from the page without saving, your settings will be lost.

Tip

The user's contact information is frequently added automatically to marketing materials, so ensure that information is correct.

Account Settings

Profile

- **First Name (required)** – Enter the new user's given name.
- **Last Name (required)** – Enter the new user's surname.
- **Select the user's role (required)** – Select the user role that will determine the permissions that apply to the user's account.
- **User Status (required)** – Select **Active** from the drop-down list if you want the user to be able to log in right away; select **Inactive** if you want to wait until later. You can toggle the account between Active and Inactive at any time after it is created.
- **Website** – Enter the full URL of the user's business website.
- **Company Name** – Enter the name of the organization the user belongs to, as it should appear on marketing materials.
- **Job Title** – Enter the user's job title, as it should appear on marketing materials.
- **Testimonial Website** – Enter the full URL of a website with positive feedback provided for the user.

Address

- **Address** – Enter the street address of the user's business location.
- **Address 2** – If the address requires a second line, such as a suite number, enter that information here.
- **City** – Enter the name of the municipality of the user's business location.



- **State** – Select the state where the user’s business location is located.
- **Zip** – Enter the ZIP code of the user’s business location.
- **Timezone** – Select the time zone where the user will be primarily using TE. This is used to determine when automatically generated and scheduled emails are sent. Daylight Saving Time is applied automatically, as appropriate.

Note

The selections for the state and time zone fields apply only to locations in the United States and its territories.

Team

- **Choose Team** – Select 1 or more teams from the drop-down list that the user should belong to. You can remove a team from the field by clicking the small **x** next to its name.

Business Unit

- **Cost Center** – Select a cost center from the drop-down list. The list entries are determined by what the options set up for your organization at Organization Admin → Manage Cost Centers.
- **Location Number** – Enter a location number that applies to the user.

Contact Information

- **Email (required)** – Enter the user’s business email address. This serves as the account username when logging in.

Note

Each user must have a unique email address. If you enter an email address that is already in use by a TE user and attempt to save the entry form, you will see an error message at the top of the screen and the new user will not be created.

- **Confirm Email (required)** – Enter the email address again. The text must match the field above to be able to submit the form.
- **Office** – Enter the user’s office phone number.
- **Fax** – Enter the user’s fax number.
- **Mobile** – Enter the user’s mobile phone number.
- **Cell Service Carrier** – Select the service provider of the mobile number entered above.

Notification Settings

Tip

Turn on all notification types for new users. They can turn off notifications they prefer not to receive in their own account settings.

- **Receive Text Message Lead Notifications?** – Select **Yes** to have the user receive a text message each time a new contact is added to their list via a lead capture app or a single property site. This does *not* include contacts you add manually, contacts shared by another user, or updates to shared contacts.
- **Receive Daily Email Digest?** – Select **Yes** to have the user receive an email summary each morning including:



- emails scheduled to be sent that day
- that day's appointments
- tasks that are due (or overdue)
- contacts who recently engaged with an email by clicking a link
- new contacts added to their list who have not been contacted yet and who do not have a loan attached to their record
- contacts with a birthday that day
- contacts with a loan anniversary that day

Each section includes a link to the relevant area of Total Expert to make it as simple as possible for the user to engage with the platform.

- **Receive Co-Marketed New Listing Alerts?** – Select **Yes** to have the user receive an email each time one of their co-marketing partners adds a property to their MLS listing.
- **Receive Co-Marketed Pending Listing Alerts?** – Select **Yes** to have the user receive an email each time one of their co-marketing partners' MLS listings has its status changed to indicate that a sale is pending.
- **Receive Email New Task Notifications?** – Select **Yes** to have the user receive an email each time a task is added to their list. This includes tasks they add for themselves and those assigned to them by co-marketing partners and members of their organization. Also sends an email each time a task assigned to them is edited by any of the same people. This applies when the task is assigned directly through the Tasks page or by attaching a task to a contact record.
- **Receive Email Lead Notifications?** – Select **Yes** to have the user receive an email each time a new contact is added to their list. This includes contacts shared with them by co-marketing partners and members of their organization. It also includes contacts generated from lead capture apps and single property sites. This does *not* include contacts they add manually or updates to shared contacts.
- **Receive Print Order Reminders?** – Select **Yes** to have the user receive an email notifying them of a print order awaiting payment from them before it can be submitted to the printer. These reminders are sent after 1, 3, and 7 days unless payment is approved earlier. Also sends an email confirmation when all parties responsible for paying for a share of a print order have approved payment.

Reset Password

- **Send Email** button – You do not need to click this when creating a new user account. When editing an existing account, click the button to generate a password reset email to the user's email address. You cannot manually set the user's password.

3rd Party Source Settings

- **External ID** – Enter the user's unique identifier in their LOS or data warehouse. This ID can be used to identify the TE user when importing data.

Email Settings

Note

These settings are used only in legacy text-only emails and do not apply to blocks-based email templates.

- **Outgoing Email From Name** – Enter the name that should appear in the From field when a recipient receives an email from this user.



- **Outgoing Email From Address** – Enter the email address that should appear in the From field when a recipient receives an email from this user.
- **Property Alert Email** – Select a saved email from the drop-down list. This email is sent any time the system generates a property alert.
- **Property Alert Cobranding Partner** – Select the name of a co-marketing partner whose information should be included on property alert emails. This draws from the list of users connected to the current user, so you cannot select a partner when settings up a new account.
- **Email Signature** – Enter the text that should be appended to any email that includes a reference to the email signature.

Marketing Profile

Account Images

Note

Image files must be no larger than 1MB. TE recommends that they are no larger than 50kB. Valid file types are .jpeg, .jpg, .png, and .gif.

- **Profile Image** – Upload an image that will serve as both a user avatar in TE and be applied as the user’s primary personal image in any marketing materials, such as a professional headshot.
- **Company Logo** – Upload an image that will represent the user’s organization in any marketing materials.
- **Team Logo Image** – Upload an image that will represent the user’s specific team in any marketing materials.

Print Media Settings

- **NMLS or License Number** – Enter the appropriate licensing information for the user.
- **Disclaimer** – Enter the text for a disclaimer that can be added to any print materials along with the user’s personal information.

Threshold Settings

- **Daily Limit** – Enter the value of the maximum amount (in dollars and cents) that the user can charge to their organization’s account in a single day. Entering 0 means no daily limit.
- **Weekly Limit** – Enter the value of the maximum amount (in dollars and cents) that the user can charge to their organization’s account in a calendar week. Entering 0 means no weekly limit.
- **Threshold Approver** – Select the name of the user who is responsible for reviewing and either approving or denying purchases whose cost would exceed the Daily Limit or Weekly Limit.

Post Close Survey Link

- **URL** – Enter the full URL of a website that a contact would be directed to after closing a loan with the user.

Social Media Settings

- **User Bio** – Enter a short marketing text blurb about the user.
- **Facebook, Twitter, Google, LinkedIn, Youtube** – Enter the full URLs for the user’s corresponding account pages.



- **Application URL** – Enter the full URL to a page where a potential customer would be able to apply for a loan and have their information captured and sent directly to the user.
- **Short Name** – The text entered in this field can be used in multiple ways. For example, it could be the user’s nickname to be referenced on informal materials or a tag in a user-specific URL.

Tip

Consult with your implementation manager to determine how to best use this field in your organization.

Web Media Settings

- **Web Disclosure Text** – Enter the text for a disclaimer that can be added to any Web materials along with the user’s personal information.

Web Content

Note

This section and the items in it are of limited availability. They allow you to set up standard text, a video link, and up to 3 images that are used when the user creates a lead capture app using the Loan Officer Website option. This option is not available to all TE customers.

- **User Quote**
- **Wistia Video ID**
- **Icon One**
- **Icon Two**
- **Icon Three**

MLS/IDX Settings

Settings on this tab are for real estate workers associated with a regional multiple listing service (MLS) only.

- **Access Key** – A read-only field that is populated when the user account is created. The value is a unique code that the user can paste into an external service to identify their Total Expert account.
- **MLS Agent ID** – Enter the user’s ID for the regional MLS.
- **State Licenses** – Select any states where the user is licensed for purposes of generating disclaimers.
- **Specify MLS Associations** – Select the regional MLS where the user’s listings can be found. If the option you are looking for is not listed, contact Customer Support.

Editing an Existing User

After a user has been created, you can modify any of the settings at any time. From the Users page, locate the user you want to modify in the list and select **Actions → Edit**.

Tip

Enter some text the **Search Name or Email** box to display only users that match that text.

Click the **Filter** button and select roles, teams, and/or a range of dates when the user was created to display only users that match your choices.



The options available when editing an existing user are the same as those when creating a new user, with the following exceptions:

- On the Account Settings tab:
 - There is a read-only Username field in the 3rd Party Source Settings section. This and the External ID field below are both populated. This information is used to integrate the user's TE account with external data services.
 - There is a section to help you set up access to the Total Expert API for this user. Click the **View API Information** button, and the credentials will appear in the ID and Secret fields. Use these when establishing an API connection to allow data to flow into this user's account.
- There is an additional Disclaimers tab. Here you can add, edit, or delete disclaimers specific to the user's account. Available types are:
 - Sub-Disclaimer
 - Print Disclaimer
 - Web Disclaimer
 - Email Disclaimer
 - License Number

Bulk Edit Options

Some options can be modified for more than 1 user at a time.

1. From the Users page, locate the users you want to modify in the list and check the box in the leftmost column for each.

Tip

Use the search and filter options to display exactly the set of users you want to modify. Then check the box in the header row to select all the displayed users. The number of selected users is shown at the top of the page. Note that this "select all" option only selects the users currently displayed on the screen; users who are hidden by filtering or who are not listed on the current page are *not* selected.

2. Click the **Edit Selected Users** button at the top of the page.
3. The Edit Selected Users box reiterates the number of selected users. In this box, all settings are optional.

Warning

The box retains the selections from the last time it was open. Be sure to clear any previous selections before proceeding.

- a. **Role** – Select a role that will be applied to all selected users. If left blank, selected users retain their current roles.
- b. **Team** – Select a team from the drop-down list that should be added to or removed from all selected users (according to the radio button option). If left blank, team assignments for selected users are unaffected.
 - i. **Add Selected Users To Team** – Select this option to add the selected users to the team you selected in the drop-down list.
 - ii. **Remove Selected Users From Team** – Select this option to remove all selected users from the team you selected in the drop-down list.



Note

Teams that the selected users belong to other than the team in the drop-down list are not affected.

- c. **Location Number** – Enter a number to define the location where the selected users should be set. If left blank, selected users retain their current locations.
 - d. **Cost Center** – Select an option to define the cost center that applies to the selected users. If left blank, selected users retain their current cost centers.
 - e. **Notifications** – Check the **Change User Notifications** box to activate the options below. (The options here correspond to Notification Settings options in the Account Settings tab.) Then check the box for any of the notification types that should apply to the selected users. A checkbox left blank means the notification is turned off for the selected users. If the Change User Notification box is unchecked, selected users retain their current notification settings.
4. Click the **Save** button at the bottom of the box.
 5. Click the **Save** button in the confirmation box to finalize the changes.

The Users page refreshes with the updated settings.

Activating and Deactivating Users

On the Users list, locate the user whose status you want to change. The Status column is at the far right of the table.

Tip

You may need to scroll to the right to see all the columns.

- Click the green toggle switch on the right to deactivate an active user. You must click the **Ok** button in the confirmation box, which indicates that some integrations will be severed, to proceed.
- Click the gray toggle switch to activate a deactivated user. A reactivated user's information, such as account settings, contact list, and saved emails, are retained. As mentioned, some integrations were severed when the user was deactivated, so these would need to be set up again.

You can activate and deactivate a user as many times as you want.

Warning

The system does not prevent data from being imported into a deactivated account. When importing data, ensure that data is being targeted to the correct accounts.

Note

You cannot deactivate an organization's Super Admin user.

Logging in on Behalf of Another User

The Total Expert platform allows a user to log in on behalf of another user in their organization. For example, an administrator could log in as an end user to conduct testing and ensure that materials have been correctly assigned.

There are 2 ways to log in as another user:



1. On the Users list, locate the user whom you want to log in as. Select **Actions → Login**.
2. Click the **Switch Account** button in the header to the left of your name and select the name of the user whom you want to log in as from the drop-down list.

Either way, you are directed to the dashboard in the selected user's account. Note that the name of the logged in user in the upper-right corner of the screen has changed to the new user and is highlighted in green to draw attention to this.

On any page you can navigate to, the data and options available to the selected user are displayed (as opposed to those for your own user).

Note

The available features in this user's account are determined by their user role and may differ significantly from your own user's. Certain administrative features from your own account may be carried into this account with you to allow you to perform specific tasks on behalf of the user in their account that they would not be able to perform themselves.

You can return to your own account at any time.

1. Click the **Switch Account** button in the header to the left of the current user's name.
2. Click **Return to my account** below the drop-down list.

You are returned to your own account on the same page you were viewing in the other user's account. If you were accessing something available in their account, but not your own, such as a contact record page, you may see an error message concerning access. Simply select an option in the navigation menu to open a valid page in your own account.

Tip

If you are finished working, you can log out as usual while logged in as another user without having to return to your own account first.