Co-Marketing for Free Accounts

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Introduction

Co-marketing is a feature of Total Expert (TE) that allows 2 separate users to include their contact information on the same piece of marketing material so that both may benefit from the exposure. This is typically a partnership between a loan officer and a real estate agent who both benefit from marketing aimed at people interested in buying a house.

Provided that both users have entered their account information, co-marketed templates automatically display full contact information, a headshot, any relevant logos, and disclaimers.

A user who does not have an account through their organization, such as a real estate agent, can sign up for a free account on the TE website when they are invited to connect by an existing user. The free account is offered by TE and is not provided by the user sending the invitation or their organization.

Once a connection is made, co-marketing partners can share contacts stored in TE and collaborate on email, Web, and print marketing. If any costs are incurred by placing an order for printed materials, both parties must pay their share of the cost according to a predetermined cost share arrangement for the piece before the order is sent to the printer.

Working together on leads and marketing materials enables both users to extend their business to areas they would otherwise not reach. Successful co-marketing partnerships strengthen working relationships.

> **Note**
> No existing contacts are shared between users when a connection is made. Sharing (or assigning) contacts is done manually. A new contact captured by co-marketed Web marketing is automatically shared with both users.

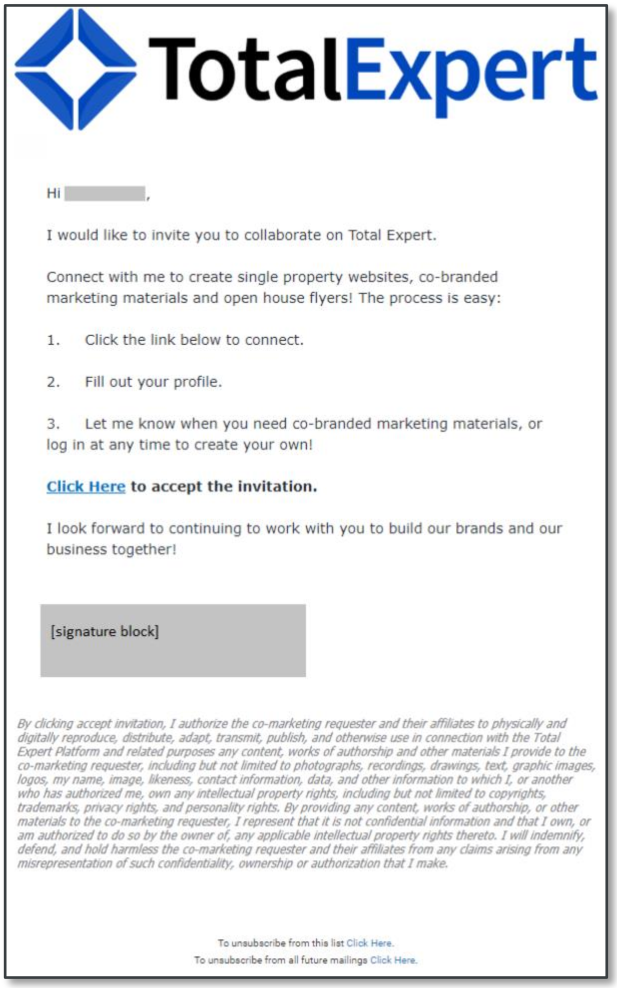
Commonly Used Terms

Name	Description
co-marketing partners	TE users who have linked their accounts to share contacts and collaborate on marketing. Most partnerships are between a free account and a full account. Any combination is allowed, but a user with a free account cannot invite another user.
free account	An account used by an independent co-marketing partner. An account of this type has fewer features and generally more restricted options, but can be upgraded to a paid individual account with access to even more tools, but there is no obligation to do so. The user can keep their account (including any connections and stored contacts) even if they change organizations. A free account is not part of any organization in the TE platform. Because TE—not the partner's organization—provides these free limited accounts, the organization is compliant with rules that prevent providing something of value.
full account	Any account that is part of an organization of licensed Total Expert users. Due to differences in each organization's setup and between roles within an organization, not all full accounts include the same features, but they are generally have access to more than a free account. The user can share selected marketing templates with a co-marketing partner, even if they are using a free account.

Receiving an Invitation to Connect

When a TE user invites you to be a co-marketing partner, you will receive an email from the platform (the default form is shown below). This email invitation is the same whether you already have a TE account or not.

Do not forward the invitation email or share the link with anyone else. The link includes a custom token that is keyed to your email address.



TotalExpert

Hi ,

I would like to invite you to collaborate on Total Expert.

Connect with me to create single property websites, co-branded marketing materials and open house flyers! The process is easy:

1. Click the link below to connect.

2. Fill out your profile.

3. Let me know when you need co-branded marketing materials, or log in at any time to create your own!

Click Here to accept the invitation.

I look forward to continuing to work with you to build our brands and our business together!

[signature block]

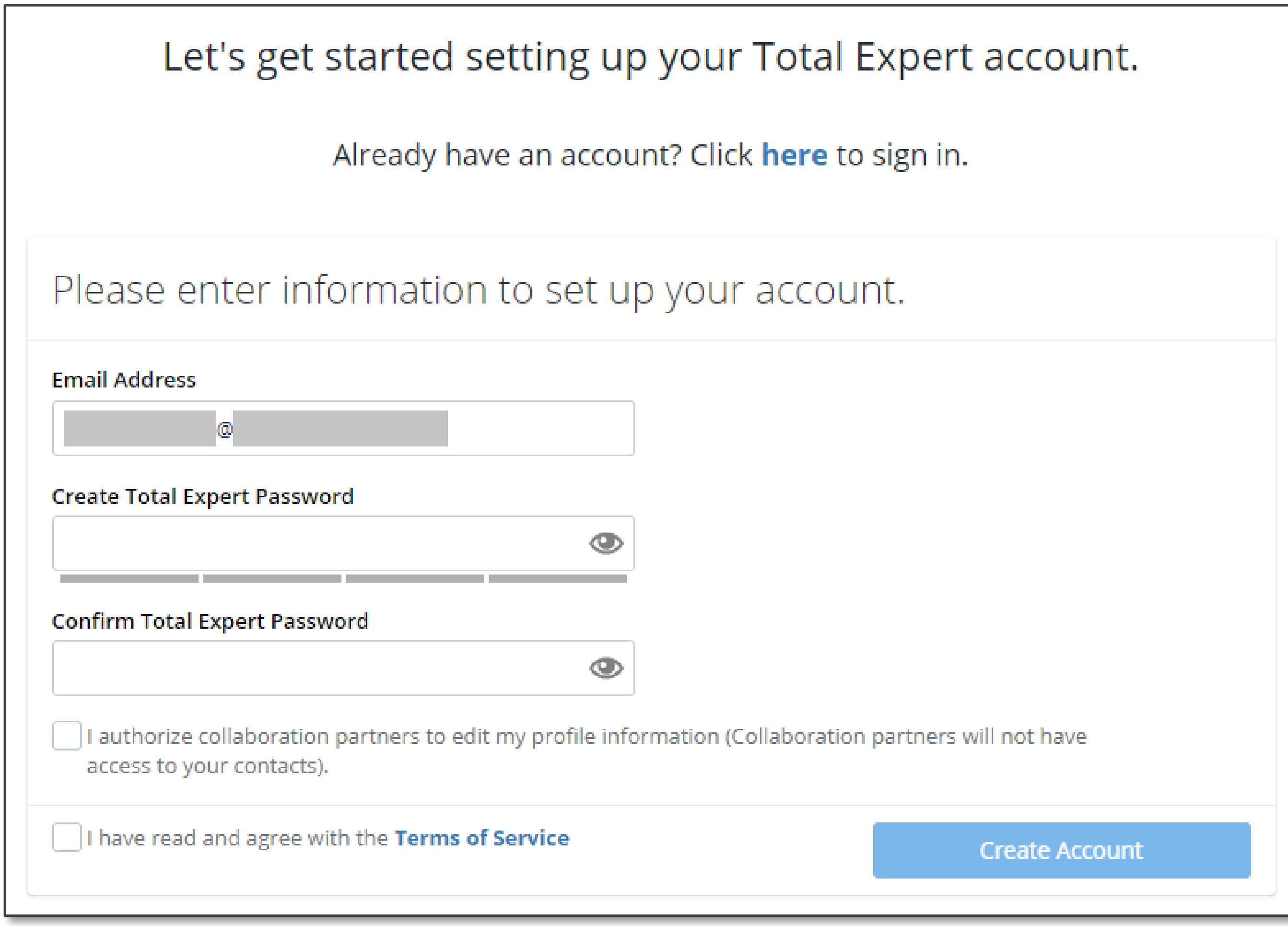
By clicking accept invitation, I authorize the co-marketing requester and their affiliates to physically and digitally reproduce, distribute, adapt, transmit, publish, and otherwise use in connection with the Total Expert Platform and related purposes any content, works of authorship and other materials I provide to the co-marketing requester, including but not limited to photographs, recordings, drawings, text, graphic images, logos, my name, image, likeness, contact information, data, and other information to which I, or another who has authorized me, own any intellectual property rights, including but not limited to copyrights, trademarks, privacy rights, and personality rights. By providing any content, works of authorship, or other materials to the co-marketing requester, I represent that it is not confidential information and that I own, or am authorized to do so by the owner of, any applicable intellectual property rights thereto. I will indemnify, defend, and hold harmless the co-marketing requester and their affiliates from any claims arising from any misrepresentation of such confidentiality, ownership or authorization that I make.

To unsubscribe from this list Click Here.
To unsubscribe from all future mailings Click Here.

If you do not sign up for an account with TE within 3 days, you will be sent a reminder email. If you still have not signed up within 7 days, you will be sent a second (and final) reminder.

When You Do Not Have a TE Account Yet

1. Click the link in the invitation email.
2. Scroll down to the registration form and fill it out.
   a. By using the link emailed directly to you, your email address is already filled in.
   b. Enter and confirm a password for your new account.
   c. (optional) Select the first checkbox to allow anyone you connect with in TE (including the person who sent you this request) to update the information in your profile that would appear on any co-marketed materials. TE recommends that you check this box to expedite the setup process and get started marketing sooner.
   d. Click the link to review the Terms of Service. (These are available to review at any time by visiting totalexpert.com/terms-of-service/.) Check the box indicating that you have read and agree with these terms. You must agree before proceeding.
   e. Click the **Create Account** button.



3. At this point, your account has been created. You can continue entering your professional information, contact information, and profile images through the form or proceed directly to totalexpert.net/login to log in. All this information can be added later while logged in.

Note

The user who invited you may have pre-filled some information for you. You can modify any pre-filled values. If any key contact and business information has not been filled out within 3 days, you will be sent a reminder email. If it still has not been filled out within 7 days, you will be sent a second (and final) reminder.

Tip

Enter as much information as you can to start seeing the marketing benefits of TE right away.

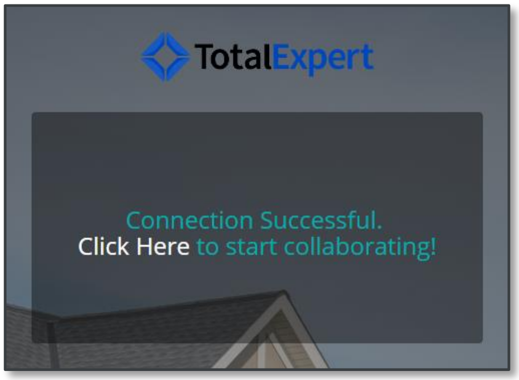
Log in with your new account and start exploring the available features! Bookmark totalexpert.net and log in daily to take full advantage of the platform.

When You Already Have a TE Account

1. Click the invitation link in the email.
2. The token in the link keyed to your email address determines that an account is associated with that address and directs you straight to the TE login page. Enter your username and password and click the

Sign In button. (If you are already logged in when you click the link, you are immediately routed to the success screen below.)

3. The connection is made automatically and a success message is shown. Click the link to continue.



Once a Connection Is Made

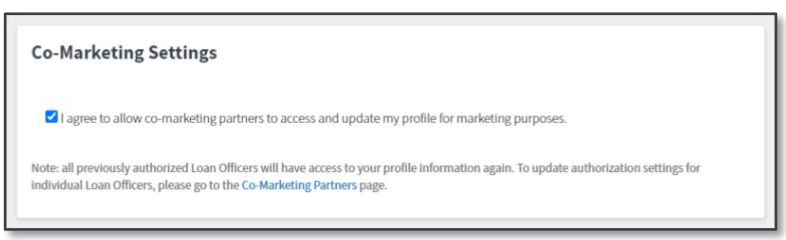
When you log in, click your name in the upper-right corner of the page to open the settings menu and fill in the information on the **Account Settings**, **Marketing Profile**, and **MLS/IDX Settings** pages if you have not already during the signup process. Be sure to click the **Save Changes** button at the top of each page before moving on.

Complete your profile if you have not already. You will need to have your full contact and licensing information complete so the platform can automatically place this information into materials that you create or your co-marketing partner creates on your behalf.

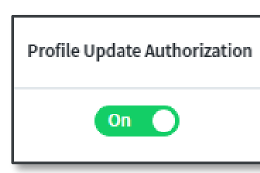
Note
Partners cannot change your MLS information, so make sure this is filled out correctly.

Additionally, if you want co-marketers to update profile information on your behalf:

1. On the Account Settings page, scroll down to the Co-Marketing Settings section and verify that the checkbox is marked.

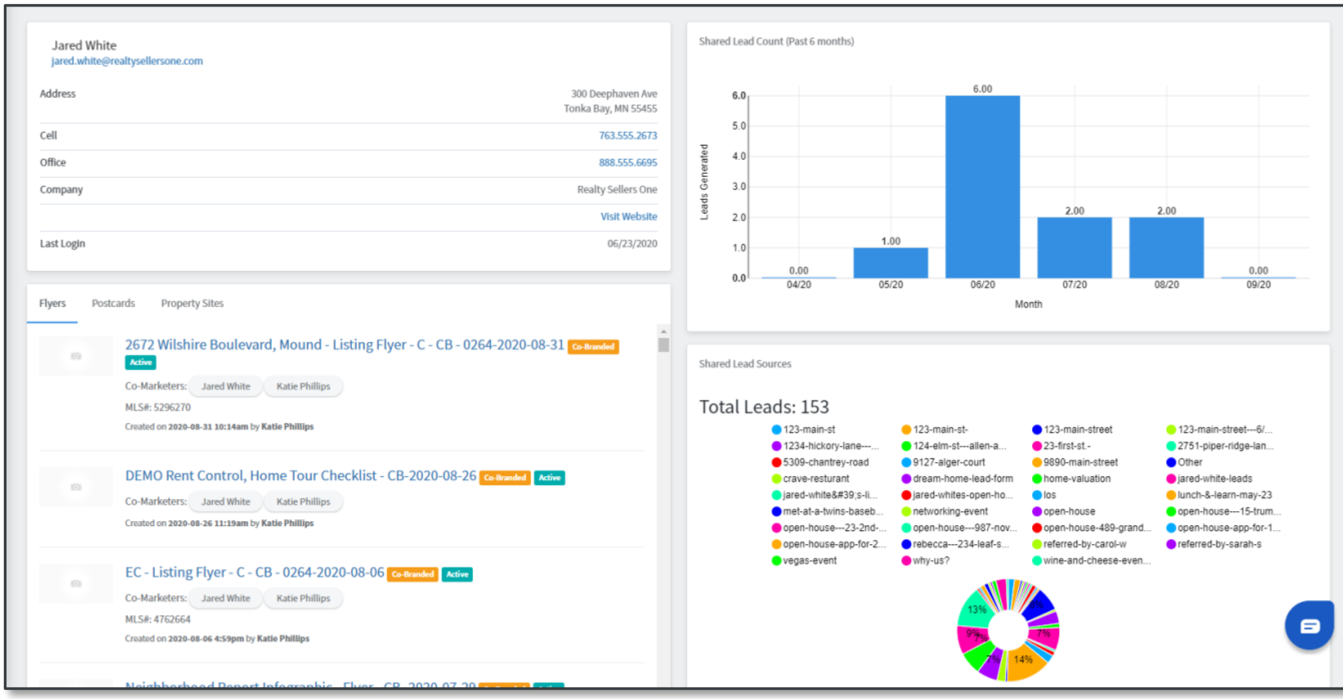


2. Select **Co-Marketing Partners** in the navigation menu. Your new connections are listed here, and you can individually toggle whether each partner can update your profile information. (If the checkbox above is not marked, the toggle switch in each row is Off and cannot be switched on.)



Once you have had some collaboration with your co-marketing partner, click their name on the list to see a report of shared leads and marketing activity.

Tip
Use this to help evaluate each partnership to determine whether it is worth maintaining.



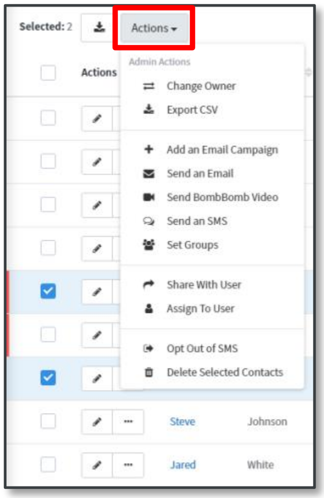
Select **Actions → Delete** if you ever feel you need to terminate a co-marketing partnership in TE. While a connection can be remade if it was deleted prematurely, this should only be used as a last resort. You will not be able to review the details of a deleted connection.

Note
Users with a free account cannot initiate a co-marketing connection through the platform.

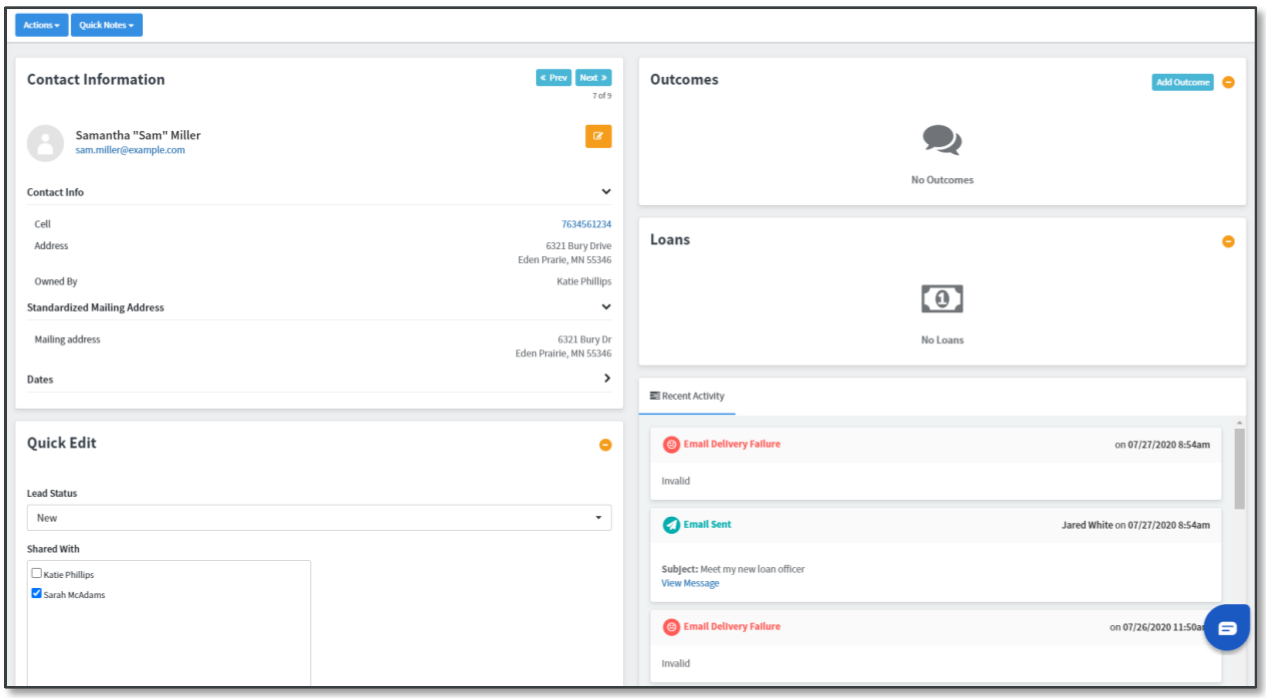
Contact Management

The heart of TE is its contact relationship manager (CRM). Navigate to **Leads & Contacts → Contacts** to see a list of all the contacts you have access to in the platform. This includes contacts you have added (or who have signed up through a lead capture app you created in TE) and those shared with you or assigned to you by a co-marketing partner.

By marking the checkboxes for 1 or more contacts in the list, you can perform various actions for the selected contacts by clicking the **Actions** menu. Options include adding them to groups, sending them email or SMS messages, and sharing them with co-marketing partners.



Click the first name of a contact to see a page with the full details for that contact and access further options, including saving appointment information and adding notes. If you own the contact or it has been assigned to you, you can click the **Edit** button to modify any details in the contact record.



Sharing Contacts

Either partner can share, unshare, assign, or unassign their contacts with the other.

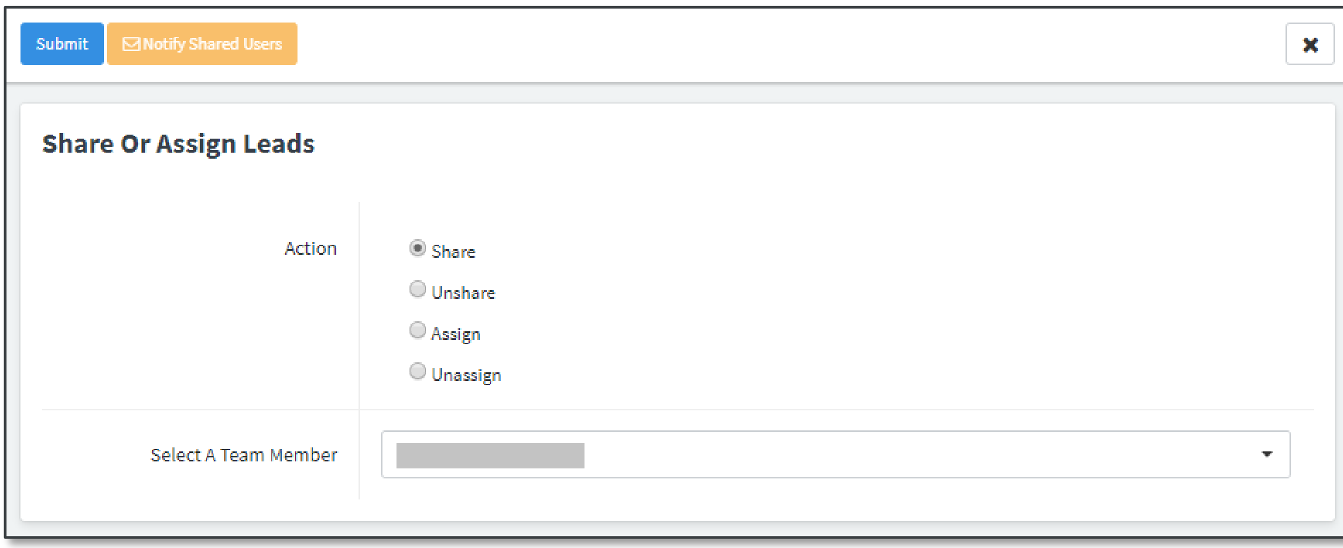
1. Navigate to **Leads & Contacts → Contacts**.
2. Check the contacts to share.
3. Select **Actions → Share With User**.
4. In the slide-out panel, select the **Share** option.
5. Select the co-marketing partner from the **Select A Team Member** drop-down menu.
6. Click the **Submit** button to share the contact.

The contact is added to the partner's contact list. The partner has read access to the information in the record by clicking the contact's first name in the contact list. However, when a contact is shared with a partner outside the owner's organization and has a private note applied, the external partner cannot see the private note. A free account does not have the option to apply a private note.

For a shared contact, only the owner can edit the items shown in the Contact Information section of the contact details page, such as name and address. Only the owner can see which users the contact has been shared with or assigned to. However, either user can add or modify some information to the record, such as contact groups, general notes, or tasks. This information is generally visible to both partners, except that groups are only visible and applicable to the user who added the group to the contact.

If you want to withdraw the partner's access to the contact record, follow the same steps as above, selecting **Unshare** in step 4. When the contact is unshared, the partner will no longer see their record in their contact list or be able to view or modify the record.

Assigning and unassigning a contact works the same way as sharing and unsharing (except that you would select either **Assign** or **Unassign** in step 4 above). The difference between assigning and sharing a contact is that the user a contact has been assigned to has access to edit the full contact record.



Marketing Content

Print

While you cannot create print (or social media) materials from scratch while using a free account, your co-marketing partner can leverage the resources of their organization and share these types of templates with you so you can create co-markting content with them using templates they shared with you. If your co-marketing partner places a print order for a piece using your marketing profile, you will be notified by email. You must agree to pay your share of the printing cost (according to a predetermined cost share arrangement for the piece) before the order is sent to the printer. If you decline the payment, the order is not placed.

See *Print Marketing_End User* for instructions on creating and paying for print materials.

To pay your share of a print order, you must first have saved a valid payment method by navigating to **settings menu → Payment Methods** and storing credit card information. Then follow the link in the notification email or navigate to **Print Marketing → Orders**.

Web

In a free account, you can create Web-based marketing in the form of Open House–type lead capture apps (select **Lead Capture Apps** in the navigation menu) and single property sites (**Web Marketing → Single Property Sites**), both of which are designed to promote real estate business.

See *Web Marketing Guide* for instructions on creating Web-based materials.

Email

You can freely create email templates and send messages using a saved or blank template in a free account (**Email Marketing → Emails**). TE also provides free accounts with a set of single-branded email templates to get you started. You can select any number of the contacts you have access to in TE as recipients.

When you send emails through the TE system, you can track how well the marketing effort is working for you by navigating to **Email Marketing → Email Stats**. Each row in this table represents a time you sent an email and includes information about bounced emails, open rate, click rate, and unsubscribes associated with that message. Click the name of the email in the list to see a full report for all recipients of that message.

Tip
Use the TE email feature to take advantage of these analytic insights!