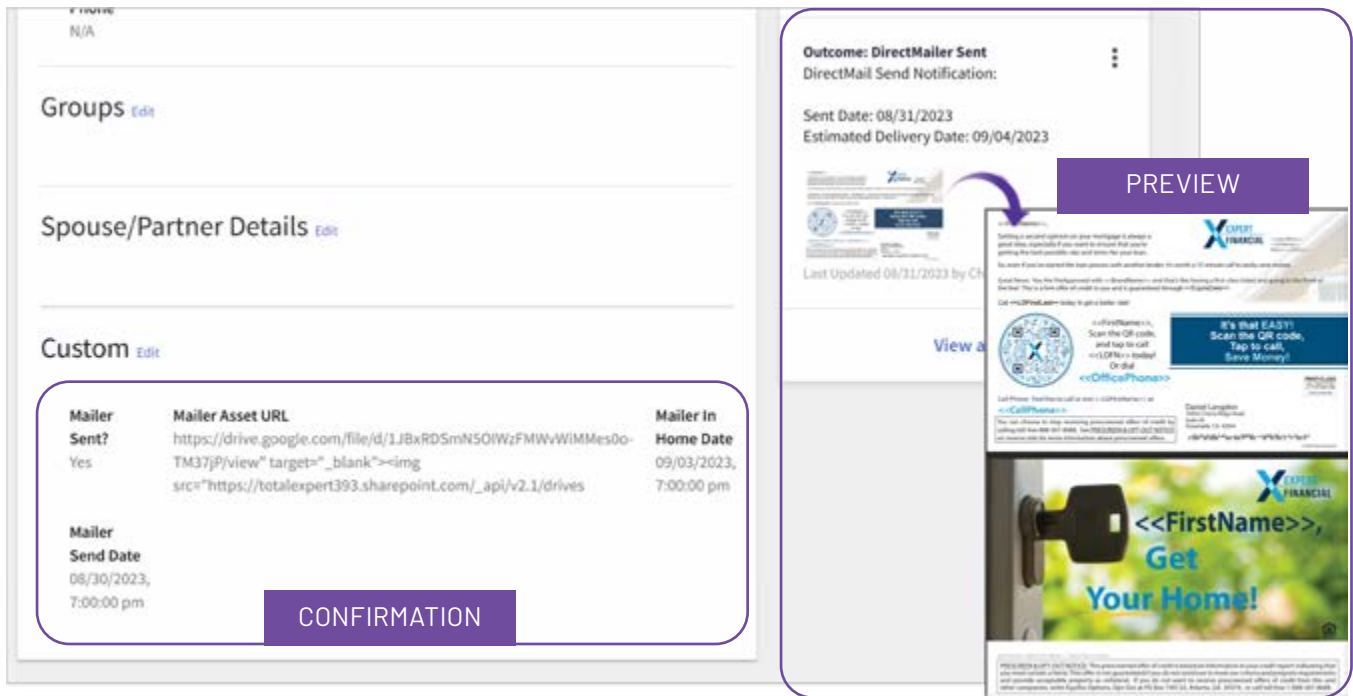


Advanced Firm Offer of Credit

When the Total Expert platform sends out a print firm offer of credit (FOC) via our print vendor DirectMailers, three important events take place. First, the FOC is sent to the client with the appropriate brand logo, colors, and name as you have configured for the contact owner. Secondly, tracking information such as a confirmation that the mailer was sent, when it was sent, a link to a digital copy of the print asset, and the delivery date all appear in the contact record. Lastly, a clickable image of the mailer is displayed in the Recent Notes if you want to preview it.

Images of the Tracking Notations and Clickable Image



The screenshot shows a CRM interface with a 'Groups' section and a 'Spouse/Partner Details' section. Below these is a 'Custom' section containing a table of mailer tracking data:

Mailer Sent?	Mailer Asset URL	Mailer In Home Date
Yes	https://drive.google.com/file/d/1JBxRD5mN50IwzFMWvWIMMesDo-TM37jP/view?target="_blank"><img src="https://totalexpert393.sharepoint.com/_api/v2.1/drives	09/03/2023, 7:00:00 pm

Below the table is a 'CONFIRMATION' button. To the right, a 'PREVIEW' button is shown above a thumbnail image of a Direct Mailer. The mailer features the Total Expert Financial logo and the text: 'It's that EASY! Scan the QR code, Tap to call, Save Money!' and 'Get Your Home!'.

More Information

Please visit our [Total Expert Knowledge Base](#) to view additional materials.