



Self-Serve Branding User Guide

Table of Contents

Introduction and Overview.....	2
What Is the Self-Serve Brand Configuration Tool?.....	2
Who Should Use This Tool?	2
Key Benefits.....	2
Tool Interface at a Glance	2
How It Works: A Quick Overview.....	3
Before You Begin: Prerequisites	3
Dynamic Branding with User Profile Fields.....	4
What Are User Profile Fields?	4
How to Use Double Curly Braces: {{ }}	4
Rules for Dynamic Tags.....	4
Combining Static Text and Dynamic Tags.....	4
Understanding Disclaimers in Branding Configuration.....	5
Defining Total Expert Attributes.....	5
Required Total Expert Attributes.....	5
Recommended and Optional Attributes	6
Best Practices	7
Step-by-Step Configuration.....	7
Creating Custom Attributes.....	8
How to Create a Custom Attribute	8
Pre-Save vs. Post-Save Behavior	11
Example Custom Attribute Use Cases	11
Managing Multiple Brands, DBAs, or Business Units	11
Understanding the Attribute Mapping Framework	12
Attribute Types and Their Roles	12
Mapping Logic	12
Cost Center Configurations.....	12
Fallback Values.....	13
Creating Cost Center Attributes.....	13
Step 1: Define Attribute Type and Name	13



Step 2: Define Attribute Values14

Step 3: Map to a Brand Attribute15

Editing Cost Center Attributes16

Creating and Managing Cost Center Configurations17

 Step 1: Add Cost Center Configurations18

 Step 2: Review Defaults and Enter Values18

 Step 3: Save Configurations.....19

Planning and Testing Branding Changes.....20

 Scenario 1: Updating an Existing Brand (For Example, Rebrand)20

 Scenario 2: Adding a New DBA.....21

 Testing Branding Configurations.....21

Introduction and Overview

What Is the Self-Serve Brand Configuration Tool?

The *Self-Serve Brand Configuration* tool empowers your marketing team to manage branding elements (logos, colors, and disclaimers) across your organization *without relying on external support*. Whether you are a single-brand business or manage multiple brands (DBAs, branches, or teams), this tool lets you:

- **Update branding instantly** (for example, add a DBS, rebrand a logo, or adjust compliance disclaimers).
- **Apply dynamic branding** using cost-center-specific values.
- **Ensure consistency** across emails, print materials, social campaigns, and Web content.

Who Should Use This Tool?

Audience	Use Case
Marketing Administrators	Manage logos, colors, disclaimers, and compliance for your organization.
Single-Brand Companies	Streamline branding with a simple, cost-effective solution.
Multi-Brand Organizations	Customize branding for branches, teams, or joint ventures (JVs).

Key Benefits

- **Autonomy** – Make changes in real time—no tickets or approvals.
- **Cost Savings** – Eliminate fees for internal service requests.
- **Compliance** – Quickly update disclaimers to meet regulations.
- **Flexibility** – Support single brands or complex multi-brand setups.

Tool Interface at a Glance

The Brand Configuration page, where you can manage all branding elements, is shown below:



How It Works: A Quick Overview

The tool uses *branding attributes* to apply your brand elements dynamically:

1. Total Expert attributes
 - Predefined elements (for example, Primary Color or Email Disclaimer) used in Total Expert templates.
 - For example: `{{brand_primary_color}}` pulls your brand's main color.
2. Custom attributes
 - Create unique elements (for example, a custom CTA or tertiary color) for specialized content.
3. Cost center attributes (multi-brand only)
 - Assign different branding values to teams, branches, or DBAs.
 - For example, Branch A uses `#FF0000` (red), while Branch B uses `#0000FF` (blue).

Before You Begin: Prerequisites

1. Verify permissions:
 - Ensure your role has:



- **Manage Marketing: Branding** (*BrandingLite*)
 - **Branding Lite: Snippet Validation** (*BrandSnippetValidation*)
 - If access issues occur, contact your organization's administrator.
- 2. (multi-brand only) Set up cost centers:
 - Navigate to **Organization Admin → Manage Cost Centers**.
 - Create a cost center for each brand:
 - **Name** – Enter the brand's customer-facing name (for example, `ABC Mortgage West`).
 - **Cost Center** – Enter the ID as a numeric code (for example, `001`).
 - **Description** – Add brief context if needed.
- 3. Create disclaimers
 - Create compliance disclaimers in **Manage Marketing → Disclaimers**.
 - **Critical:** Follow the [State Disclaimers Setup Guide](#) for dynamic, state-level legal language.
- 4. Prepare branding elements (for example, logos and color codes)

Dynamic Branding with User Profile Fields

What Are User Profile Fields?

User profile fields let you personalize content dynamically by pulling information directly from a user's profile (such as their name, company, or logo). These fields update automatically, ensuring every piece of content stays accurate and relevant—no manual edits are needed.

How to Use Double Curly Braces: {{ }}

Wrap profile field tags in `{{ }}` and `}}` to insert dynamic values.

Example

User's Company Name: `{{brand_user.company}}`

User's Company Logo: `{{brand_user.logo_image}}`

This code will display the logged in user's actual company name or logo in emails, social media posts, or print materials.

Rules for Dynamic Tags

1. Case sensitivity:
 - `{{brand_user.company}}` works.
 - `{{Brand_User.Company}}` fails.
2. Spacing:
 - Both `{{brand_user.company}}` and `{{ brand_user.company }}` are valid.
3. When to use vs. override:
 - **Use profile fields** for values that vary by user (such as individual agent logos).
 - **Override with attributes** for values that are standardized (such as a shared DBA color).

Combining Static Text and Dynamic Tags

Mix fixed text with dynamic tags to create flexible branding elements.



Example

Custom CTA for multiple brands:

Attribute Value:

Call `{{brand_user.company}}` today at `{{brand_user.phone_office}}!`

Renders As:

For User 1: “Call ABC Mortgage today at (555) 123-4567!”

For User 2: “Call XYZ Loans today at (555) 765-4321!”

Understanding Disclaimers in Branding Configuration

Disclaimers help ensure your marketing materials remain compliant. These are created and named by your organization by navigating to **Manage Marketing → Disclaimers**.

To use a disclaimer in your branding configuration, reference it using the following format:

```
{{organization.disclaimers.[Your_Disclaimer_Name].content}}
```

Example

If you created a disclaimer named `Standard_Social_Disclaimer`, you would use:

```
{{organization.disclaimers.Standard_Social_Disclaimer.content}}
```

Note

Disclaimer names are case sensitive.

Next steps:

1. Define your **Total Expert attributes** (such as Primary Color and Email Disclaimer).
2. (optional) Create **custom attributes** for unique branding needs.

Defining Total Expert Attributes

Total Expert attributes are predefined branding variables used throughout Total Expert–provided content. These attributes ensure a consistent brand presence across email, print, and social marketing materials.

Note

When the Branding Configuration page first loads, placeholder values are automatically populated. If these align with your organization’s branding needs, you can leave them as-is. Otherwise, you should modify them to meet your specific requirements.

Required Total Expert Attributes

These attributes must be defined to ensure Total Expert–provided content renders properly.

Attribute	Description	Action
Primary Color	Main brand color used across templates	Update with your brand’s HEX or RGB value
Secondary Color	Secondary/accent brand color	Update with your brand’s HEX or RGB value



Attribute	Description	Action
Company Name	Customer-facing company name	Leave as <code>{{brand_user.company}}</code> to dynamically pull from the user profile
Logo	Main logo used across content	Leave as <code>{{brand_user.logo_image}}</code> to pull from user profile
Print Disclaimer	Used in print materials	Leave as-is and ensure a disclaimer named <code>Standard_Print_Disclaimer</code> exists in the disclaimer library
Social Disclaimer	Used in social media marketing materials	Leave as-is and create <code>Standard_Social_Disclaimer</code> in the disclaimer library
Email Disclaimer	Used in email campaigns	Leave as-is and create <code>Standard_Email_Disclaimer</code> in the disclaimer library
Web Disclaimer	Used in Web content such as single property sites and lead capture apps	Leave as-is and create <code>Standard_Web_Disclaimer</code> in the disclaimer library

Recommended and Optional Attributes

The following attributes are available to enhance flexibility and compliance in your branded content.

- **Recommended attributes** support consistent logo use across various layouts.
- **Optional attributes** are use-case specific and should only be configured if your organization requires them.

Attribute	Type	Purpose	Action
Logo Stacked	Recommended	Vertical logo layout for specific templates	Update with image URL
Logo Horizontal	Recommended	Horizontal logo layout for emails or headers	Update with image URL
Logo Stacked White/Black	Recommended	White version of the vertical logo (for dark backgrounds)	Update with image URL
Logo Horizontal White/Black	Recommended	White version of the horizontal logo (for dark backgrounds)	Update with image URL
Organization State Disclaimers	Optional	Appends state-specific compliance language to other disclaimers	Add <code>{{organization_state_disclaimers}}</code> at the end of any standard disclaimer tag to populate state disclaimers where a user is licensed



Attribute	Type	Purpose	Action
FOC Disclaimer	Optional	Required only if your organization sends print customer intelligence alerts related to firm offers of credit	Leave as-is and create <code>Standard_FOC_Disclaimer</code> in the disclaimer library (only if this use case applies)

To use organization state disclaimers:

- Set up your state-level disclaimers using the [State Disclaimers Setup Guide](#).
- Append the system-generated state disclaimer tag inside any branding attribute value.
- Example (Print Disclaimer field):

```
{{organization.disclaimers.Standard_Print_Disclaimer.content}} {{organization_state_disclaimers}}
```

Best Practices

- Define Total Expert attributes before custom attributes.
- Do not create new attributes for values already available via user profile fields (such as user email or user profile image).
- Use the provided placeholders when they meet your needs—they are designed to cover common scenarios.

Step-by-Step Configuration

1. Navigate to **Manage Marketing → Brand Configuration**.
2. Update attribute values.
 - Click in each field and:
 - Enter static values. Use HEX codes for colors.
 - Use dynamic tags. For example, `{{brand_user.logo_image}}`.
 - Refer to disclaimers. For example, `{{organization.disclaimers.Standard_Email_Disclaimer.content}}`.

Color

Manage [HEX](#), [RGB](#) value or [Cost Center Attribute](#)

Primary Color*

rgb(19,44,69)

System-generated name: brand_primary_color

3. Click the **Save** button in the upper-right corner of the page to save your changes.
 - Changes apply immediately to all *new* content created after you save.



Creating Custom Attributes

Custom attributes are unique to your organization. These attributes can be used in addition to Total Expert attributes across supported areas of the platform or in custom content created through Total Expert Content Services.

Tip

Use a custom attribute when you need a branding variable that is not provided by Total Expert attributes, the value is consistently used across content, and is not available in the user profile.

How to Create a Custom Attribute

1. On the Brand Configuration page, click the **+Add Custom Attribute** button.

Brand Configuration

Brand Attributes Cost Center Configurations (0)

Total Expert Attributes

These attributes are used across the Total Expert platform and within Expert Content. They are required to ensure your brand is accurately represented across all marketing channels.

Color
Manage [HEX, RGB value](#) or [Cost Center Attribute](#)

Primary Color*

System-generated name: brand_primary_color

Secondary Color*

System-generated name: brand_secondary_color

Name

Company Name*

System-generated name: brand_company_name

Logo
Manage [image location url](#) or [Cost Center Attribute](#)

Logo*

System-generated name: brand_user_logo
[Show optional logos](#)

Disclaimer
Manage [tag](#) or [Cost Center Attribute](#)

Print Disclaimer*

System-generated name: brand_print_disclaimer

Social Disclaimer*

System-generated name: brand_social_disclaimer

Email Disclaimer*

System-generated name: brand_email_disclaimer

Web Disclaimer*

System-generated name: brand_web_disclaimer

Foc Disclaimer*

System-generated name: brand_foc_disclaimer

Organization State Disclaimer*

[+ Add Custom Attribute](#)

2. Select 1 of the available options from the **Attribute Type** drop-down list:
 - a. Color
 - b. Logo
 - c. Disclaimer
 - d. Name
 - e. Link
 - f. Other (best for text-based values)

Tip

The selected type helps organize attributes and provides formatting tips during setup.



3. Enter the name of your attribute in the **Attribute Name** field.
 - a. This is the name you will see in the administrator interface when managing attributes.
 - b. Once you enter the name, the system automatically generates a system name (for example, `brand_email_logo`) that is used to insert the attribute into content.

4. Click the **Next** button.
5. Under Define Value:
 - a. Select the **New Value** option.
 - b. Enter the value in the **Attribute Value** field. This is what will appear when the attribute is used in branded materials.

Examples:

- i. Text string: `Apply today with confidence.`
- ii. Liquid tag: `{{brand_user.logo_image}}`
- iii. Image URL: `https://yourdomain.com/logo-email.png`
- iv. Color: `rgb(79,121,66)`



Add Custom Attribute

Define an attribute unique to your organization for use across the platform and content where available or through custom engagements.

1

Define Type and Name

2

Define Value

3

Review and Confirm Attribute

Which type of value would you like to enter for "Tertiary Color"?*

☒ New Value
Optimal for single-brand organizations

☐ Existing Cost Center Attribute

Attribute Value*

rgb(79,121,66)

[Color formats](#) universally accepted across email, social, web and print.

6. Click the **Next** button.

7. Check your work and click the **Confirm and Add Attribute** button.

Add Custom Attribute

Define an attribute unique to your organization for use across the platform and content where available or through custom engagements.

1

Define Type and Name

2

Define Value

3

Review and Confirm Attribute

SUMMARY

Attribute Type	Color
Attribute Name	Tertiary Color
System-Generated Name	brand_tertiary_color
Value Type	New Value
Attribute Value	rgb(79,121,66)

Please check your work

After adding, Tertiary Color can be edited or deleted **prior to page Save**; value settings are editable anytime.



Custom Attributes (optional)

Unique to your organization, these attributes can be used in addition to Total Expert attributes across the platform and content where available or through custom engagements.

1 Attributes

COLOR

Tertiary Color

brand_tertiary_color

New



Note

Once you save the page, the attribute name and type are locked. You can continue to edit the attribute value and (if needed) map it to a cost center attribute.

Pre-Save vs. Post-Save Behavior

Action	Before Saving the Page	After Saving the Page
Edit Attribute Name	Yes	No
Delete Attribute	Yes	No
Edit Attribute Value	Yes	Yes
Map to Cost Center Attribute (future-proofing)	Yes	Yes

Unsaved attributes are marked with a **New** badge. These attributes can be freely edited or removed until the page is saved.

Example Custom Attribute Use Cases

Name	System-Generated Name	Use Case	Example Value
CTA Text	brand_cta_text	Dynamic call to action used across multiple templates	Apply today with <code>{{brand_user.name}}</code>
Email Logo	brand_email_logo	Logo variation optimized for email layouts	<code>{{brand_user.logo_image}}</code> or image URL
Tertiary Color	brand_tertiary_color	Additional brand color used in custom content when 2 colors are not enough	rgb(102,204,153)

Managing Multiple Brands, DBAs, or Business Units

Organizations that operate under multiple brands, DBAs, or business units often require unique branding elements for each group—such as different logos, colors, and disclaimers. This section outlines how to configure branding in a scalable way using cost centers, attributes, and mappings, so that each user sees the correct brand based on their



assigned cost center. Whether you are supporting 2 brands or 20, these steps will help ensure brand consistency across all marketing materials.

Understanding the Attribute Mapping Framework

When your organization supports multiple brands, DBAs, or business units, it is important that each group displays the correct branding across all marketing channels. The Brand Configuration tool supports this by using a structured attribute-and-mapping system that allows you to set brand-specific values and connect them to platform-wide variables.

This section outlines how the different types of attributes work together and how values are pulled based on the user’s assigned cost center.

Attribute Types and Their Roles

Attribute Type	Purpose
Cost center attributes	Dynamic values that vary based on the user’s assigned cost center (for example, different logos, disclaimers, or colors for each DBA).
Total Expert attributes	Standardized platform attributes used across Total Expert–provided content. These attributes must be mapped to cost center attributes to support brand variations.
Custom attributes	Optional attributes used in editable templates or custom content. These can also be mapped from cost center attributes if variations are needed by brand.

Mapping Logic

Mapping is what connects your cost center attributes to either Total Expert attributes or custom attributes. This ensures the correct value is used for each user based on their cost center assignment.

Example

You create a cost center attribute called `dba_logo_horizontal`, and map it to the optional Total Expert attribute `brand_user_logo_horizontal`. When content references `{{brand_user_logo_horizontal}}`, it dynamically displays the appropriate logo for the user’s assigned cost center.

Mapped values automatically update in content wherever those attributes are used.

Cost Center Configurations

Each configured cost center has its own set of attribute values—this is called a *cost center configuration*. You must define a value for every cost center attribute for each configured cost center.

- If most cost centers share the same value for an attribute, you can apply a default and override individual values as needed.
- Only 1 configuration exists per cost center. Editing a configuration updates branding for all users assigned to that cost center.



Fallback Values

Fallback values are used when:

- A user does not have a cost center assigned.
- The user's cost center has not yet been configured.

Each attribute includes a fallback option to ensure consistent branding in these cases. Fallbacks apply only when the entire cost center is missing or unconfigured—not when individual values are left blank within an existing configuration.

Administrators are prompted to complete any missing values before saving.

Creating Cost Center Attributes

For organizations with multiple brands, DBAs, or business units, *cost center attributes* are the key to applying different branding standards for each group. Each attribute represents a specific branding element—like a logo, color, or disclaimer—that can vary by brand. You must define values for each cost center, then map those attributes to platform-wide brand attributes so they appear correctly in content.

Before creating cost center attributes, make sure your cost centers have already been created under **Organization Admin → Manage Cost Centers**. A link to this page is also available in the sidebar during setup.

Step 1: Define Attribute Type and Name

To begin, click the **+Add Cost Center Attribute** button.

The screenshot displays the 'Brand Configuration' page in Total Expert. The left sidebar contains 'Brand Attributes' and 'Cost Center Configurations (0)'. The main content area is divided into two sections: 'Total Expert Attributes' and 'Cost Center Attributes (optional)'. The 'Total Expert Attributes' section includes fields for Color (Primary and Secondary), Logo, Name (Company Name), and various Disclaimers (Print, Social, Email, Web, FOC, and Organization State). The 'Cost Center Attributes (optional)' section currently shows 'No Attributes Found'. A red arrow points to the '+ Add Cost Center Attribute' button at the bottom right of the interface.

In the Add Cost Center Attribute box:

1. In the **Attribute Type** drop-down list, select the appropriate type for your attribute (such as Logo, Color, or Disclaimer).



2. In the **Attribute Name** field, enter the name you want for your attribute. This name is used to identify the attribute in your configuration and elsewhere in the platform.
3. Click the **Next** button.

Step 2: Define Attribute Values

Next, determine how values for this attribute will be applied across your cost centers.

1. Select 1 option for the **Will most cost centers share the same “[name]” value?** setting:
 - a. **Yes, most share the same value** – Enter the shared value in the **Shared Value** field that appears below. This value will apply to all cost centers by default. You can override individual cost centers later if needed.
 - i. Use this option when most brands share a value (such as primary color), with few exceptions.
 - b. **No, most have unique values** – Enter the default value in the **Default Value** field that appears below. This value will be used only when a user does not have an assigned or configured cost center.
 - i. Use this when each cost center is likely to have a unique value (such as logo or DBA name).

Tip

If most users belong to one main brand, use the default value for that brand and configure exceptions only where needed.

2. Click the **Next** button.



Step 3: Map to a Brand Attribute

A cost center attribute must be mapped to a Total Expert attribute or a custom attribute to be usable in content. Mapping tells the system how to reference the right value based on the user's cost center.

1. Select 1 of the 3 options under **How should "[name]" be mapped?**
 - a. **Map to existing branding attribute** – Use this when the attribute you are defining matches a supported branding element used in Expert Content. Then in the **Select Existing Brand Attribute** drop-down list, select the relevant field to map.
 - i. For example: A `dba_primary_color` attribute should be mapped to `brand_primary_color`.
 - b. **No similar brand attribute exists; map to custom** – Use this when no Total Expert attribute exists, but the attribute is needed in custom content or editable templates. When this is selected, the Mapped Brand Attribute shows which attribute will be used.
 - i. For example: `dba_cta_text` mapped to `brand_cta_text`.
 - c. **No mapping is needed** – Use this only if you are preparing for a future branding change or storing placeholder values. Unmapped attributes will not appear in content until mapped later.
2. Click the **Next** button.



Add Cost Center Attribute

Define an attribute for customization within entities.

1 ☒ Define Type and Name

2 ☒ Define Value

3 ☒ Map to Brand Attribute

Map connection to a similar custom brand attribute

How should "Horizontal" be mapped?

☒ Map to existing brand attribute

☐ No similar brand attribute

☐ No mapping is needed

Attribute Name

Horizontal Logo

brand_user_logo_horizontal
Not Mapped

brand_user_logo_stacked_white
Not Mapped

brand_user_logo_horizontal_white
Not Mapped

brand_user_logo_stacked_black
Not Mapped

brand_user_logo_horizontal_black

Previous Next

4 Review and Confirm Attribute

Note

Do not create a custom attribute for elements that already have a corresponding Total Expert attribute (such as horizontal logos). Always use the predefined attribute when available.

3. Review the configuration and click the **Confirm and Add Attribute** button.

Editing Cost Center Attributes

Before saving the Brand Configuration page:

- You can edit the attribute name, type, value, and mapping.
- Changing your shared value selection may impact individual cost center configurations. If switching from No to Yes, any custom values will be overwritten.

After saving the Brand Configuration page:

- Attribute names and types become locked.
- You can still update the values or change mappings at any time.



Cost Center Attributes (optional)

Manage attributes to customize within entities such as DBAs.

6 Attributes [Expand All](#) | [Collapse All](#)

COLOR		
dba_primary_color		
dba_secondary_color		
dba_tertiary_color		
DISCLAIMER		
dba_capture_disclaimer		
LOGO		
dba_logo		
NAME		
dba_company_name		

Tip

As a best practice, after creating all cost center attributes, save your work before proceeding to assign values for each cost center. This ensures a clear mapping structure is in place and helps avoid accidental misconfiguration.

Creating and Managing Cost Center Configurations

Once you have created and mapped your cost center attributes, the next step is to define the actual values for each cost center. This is done in the **Cost Center Configurations** tab.

Brand Configuration

Brand Attributes | **Cost Center Configurations (0)**

Total Expert Attributes

These attributes are used across the Total Expert platform and within Expert Content. They are required to ensure your brand is accurately represented across all marketing channels.

Color

Manage HEX, RGB value or Cost Center Attribute

Primary Color*

rgb(19,44,69)

System generated name: brand_primary_color

Secondary Color*

rgb(236,194,117)

System generated name: brand_secondary_color

Name

Company Name*

{{ brand_user.company }}

System generated name: brand_company_name

Logo

Manage image location url or Cost Center Attribute

Logo*

{{ brand_user.logo_image }}

System generated name: brand_user_logo

[Show options & notes](#)

Disclaimer

Manage tag or Cost Center Attribute

Print Disclaimer*

{{ organization.disclaimers.Standard_Print_Disclaimer.co }}

System generated name: brand_print_disclaimer

Social Disclaimer*

{{ organization.disclaimers.Standard_Social_Disclaimer.c }}

System generated name: brand_social_disclaimer

Email Disclaimer*

{{ organization.email_disclosure_text }}

System generated name: brand_email_disclaimer

Web Disclaimer*

{{ organization.web_disclosure_text }}

System generated name: brand_web_disclaimer

Fec Disclaimer

{{ organization.disclaimers.Standard_FOC_Disclaimer.co }}

System generated name: brand_fec_disclaimer

Organization State Disclaimers

[+ Add Custom Attribute](#)

Cost Center Attributes (optional)

Manage attributes to customize within entities such as DBAs.

5 Attributes [Expand All](#) | [Collapse All](#)

COLOR		
dba_primary_color		
dba_secondary_color		
dba_tertiary_color		
LOGO		
dba_logo		
NAME		
dba_company_name		

[+ Add Cost Center Attribute](#)



Each cost center configuration contains the set of branding values that will be applied to users assigned to that cost center. You can think of it as the “branding profile” for each brand, DBA, or business unit.

Step 1: Add Cost Center Configurations

Click the **+Add Configuration** button. In the box that appears, select the cost center(s) you want to configure. These options are pulled from your organization’s existing list of cost centers (configured at **Organization Admin** → **Manage Cost Centers**).

Click the **Add Configurations** button in the box. Each selected cost center appears in a separate row in the table.

Note

You can add multiple cost centers at the same time, but each one is configured separately. After adding cost centers, each one has its own row where you can enter and manage values independently.

Step 2: Review Defaults and Enter Values

Each cost center row lists the active attributes. Some may already be pre-filled—this happens when a shared or default value was applied when you created the cost center attribute.

Select the checkbox for a cost center row and select Actions → Edit to open a slide-out panel where you can configure the cost center’s values.

- You can override any default by clicking into the field and entering a new value specific to that cost center.
- Unconfigured values appear with an orange indicator along the left edge, which signals that they still need to be defined.
- Click the **Use Default Value** option to apply the default value to that specific attribute.

Click the **Confirm Changes** button at the bottom of the panel to apply your changes.



Brand Configuration

Brand AttributesCost Center Configurations (5)

Attributes by Cost Center

Assign attribute values to each cost center you intend to configure. These values determine what appears in content based on a user's assigned cost center. All attributes must be defined for each cost center. If a cost center isn't configured, default values will apply.

Actions Select to assign values

Manage Cost CentersAdd Configuration

Cost Center Name	Identifier	Primary Color (dba_primary_color)	Secondary Color (dba_sec...	Tertiary Color (dba_tertiar...	Horizontal Logo (dba_h...
<input checked="" type="checkbox"/> ABC Lending	001	#89CFF0	—	—	—
<input type="checkbox"/> Expert Mortgage	002	#89CFF0	—	—	—
<input type="checkbox"/> Total Lending	003	#89CFF0	—	—	—
<input type="checkbox"/> Reeves Mortgage	004	#89CFF0	—	—	—
<input type="checkbox"/> A to Z Home Loans	005	#89CFF0	—	—	—
Default Value:		#89CFF0	FF5733	#9FE2BF	www.company.com

1-5 of 5 Cost Center Configurations

Manage Values for ABC Lending (001)

All Attributes

COLOR

Primary Color (dba_primary_color)*

#89CFF0

Mapped to: brand_primary_color

Use Default Value

Secondary Color (dba_secondary_color)*

Mapped to: brand_secondary_color

Use Default Value

Tertiary Color (dba_tertiary_color)*

Not Mapped

Use Default Value

LOGO

Horizontal Logo (dba_horizontal_logo)*

Mapped to: brand_user_logo_horizontal

Use Default Value

Main Logo (dba_main_logo)*

CancelConfirm Changes

At the bottom of the table, there is a row labeled Default Value—this is the baseline configuration that applies to unconfigured cost centers or fallback scenarios.

Brand Configuration

Brand AttributesCost Center Configurations (5)

Attributes by Cost Center

Description

Actions Select to assign values

Manage Cost CentersAdd Configuration

Cost Center Name	Identifier	Primary Color (dba_primary_color)	Secondary Color (dba_secondary_...	Tertiary Color (dba_tertiary_color)
<input checked="" type="checkbox"/> ABC Lending	001	#89CFF0	—	—
<input type="checkbox"/> Expert Mortgage	002	#89CFF0	—	—
<input type="checkbox"/> Total Lending	003	#89CFF0	—	—
<input type="checkbox"/> Reeves Mortgage	004	#89CFF0	—	—
<input type="checkbox"/> A to Z Home Loans	005	#89CFF0	—	—
Default Value:		#89CFF0	FF5733	#9FE2BF

1-5 of 5 Cost Center Configurations

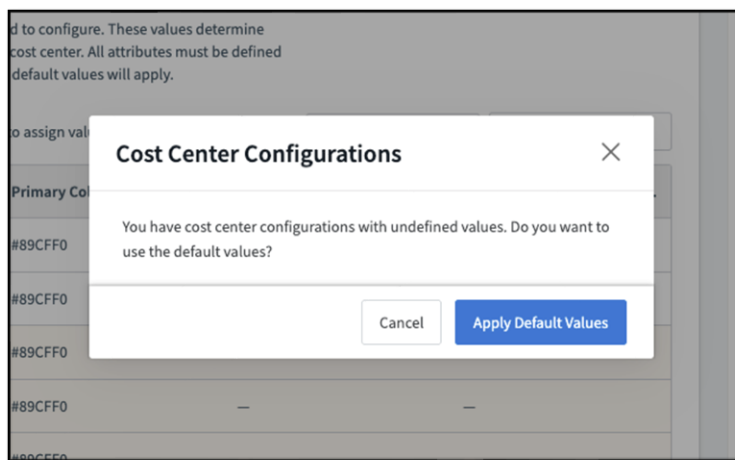
Step 3: Save Configurations

You cannot save the page until all cost centers are fully configured. This prevents issues with rendering incomplete branding in live content.



If you try to save while any attributes are still unassigned, you are prompted to either:

- Click the **Cancel** button to continue working.
- Click the **Apply Default Values** to assign the applicable default value to all unassigned fields.



Once all attributes are defined and saved, your branding configuration for those cost centers is complete.

Planning and Testing Branding Changes

All changes made in the Self-Serve Brand Configuration tool take effect immediately for users assigned to a cost center—*there is no staging or preview mode*. This real-time behavior introduces risk if updates are made before they are fully validated.

To protect brand integrity and avoid compliance issues, follow the recommendations below based on use case.

Scenario 1: Updating an Existing Brand (For Example, Rebrand)

If users are already assigned to a cost center and you need to make significant changes, use a test cost center to validate updates before applying them to live configurations.

Recommended steps:

1. Create a new test cost center (for example, Rebrand_Test) and apply your intended attribute changes there.
2. Assign a demo user to the test cost center.
3. Use the Branding Profile Asset and test dynamic content feature to ensure all branding variables render correctly.
4. Once confirmed, manually replicate the updated values in the original cost center configuration.
5. Delete or archive the test cost center if it is no longer needed.

Note

All users must be unassigned from a cost center before the system allows deletion.



Scenario 2: Adding a New DBA

If you are creating a cost center for a new DBA without any assigned users, you can configure the cost center directly—just complete setup before assigning users to avoid exposing incomplete branding.

Recommended steps:

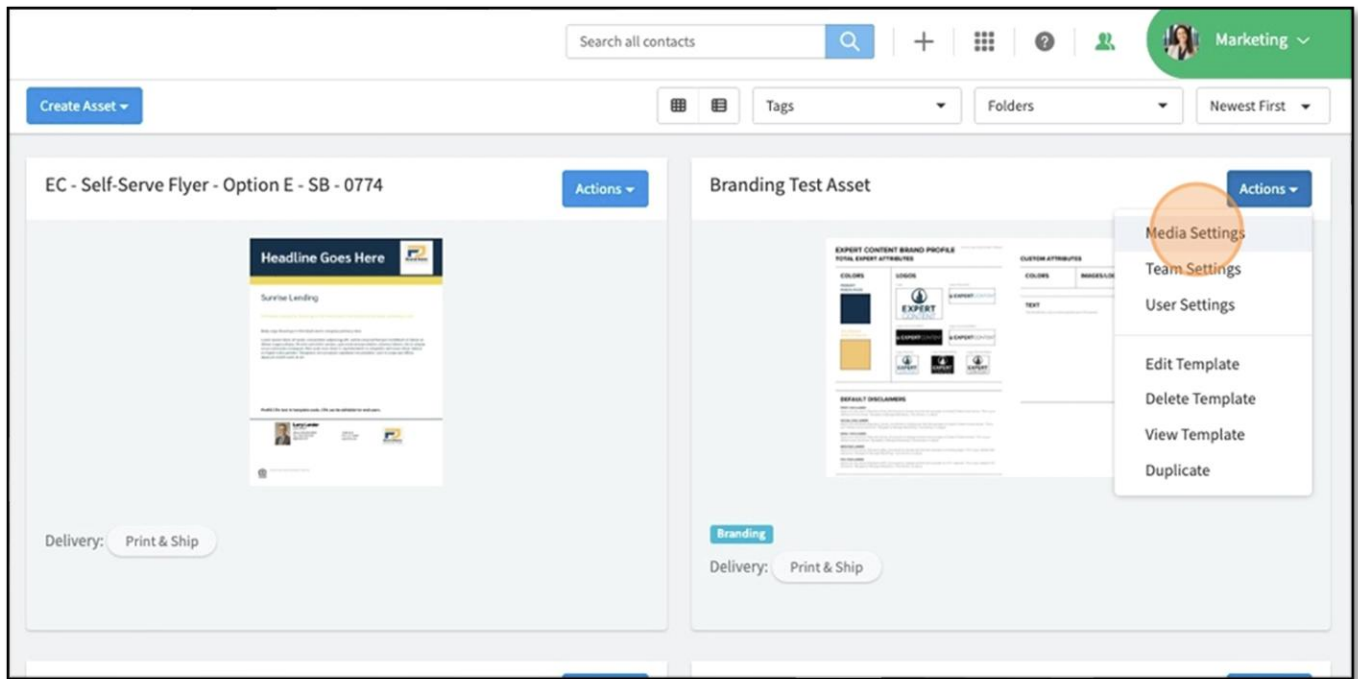
1. Create the new cost center using the official DBA name and identifier.
2. Configure all required branding attributes.
3. Assign a demo user to the cost center for testing.
4. Preview the template content to ensure all branding renders correctly.
5. Once confirmed, assign real users to the cost center.

Testing Branding Configurations

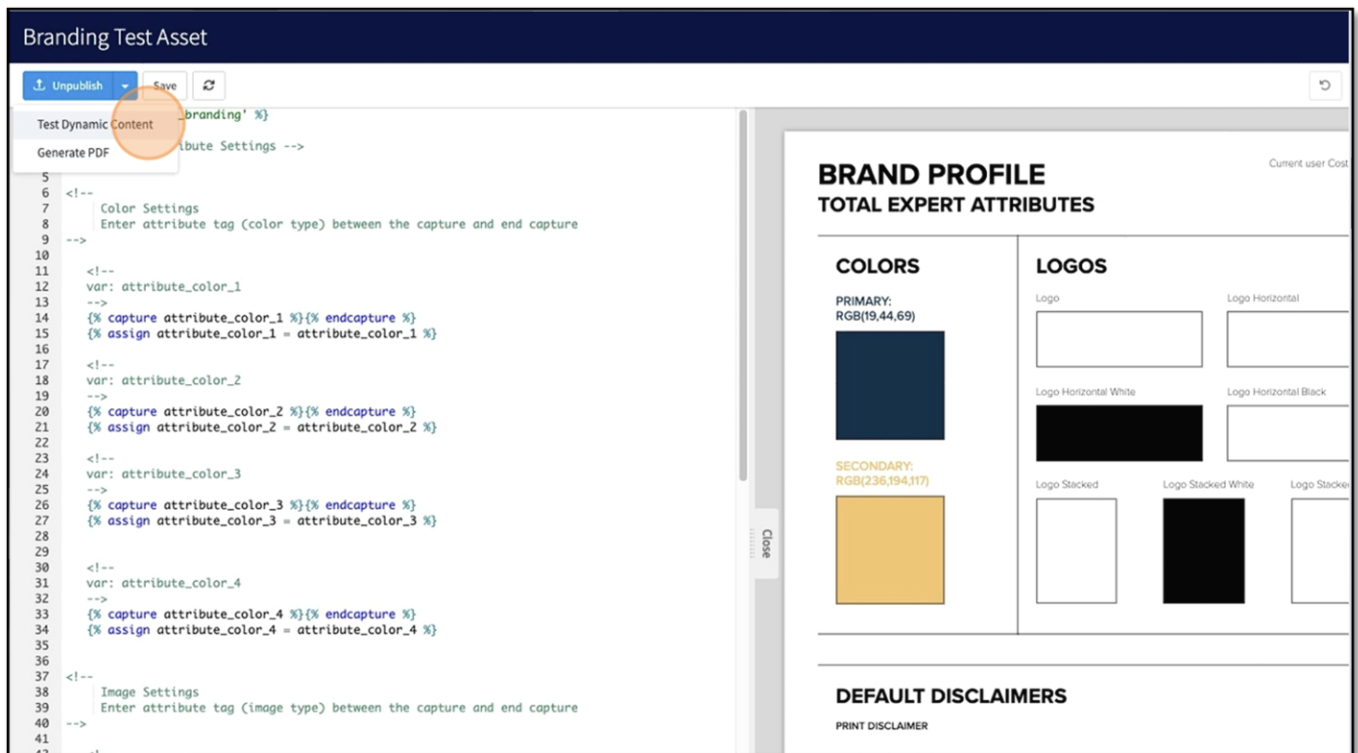
1. Once all attributes and DBA branding configurations (if applicable) have been created and saved, you are ready to test.
2. To test custom attributes, click the **Copy** button for the attribute you want to test.



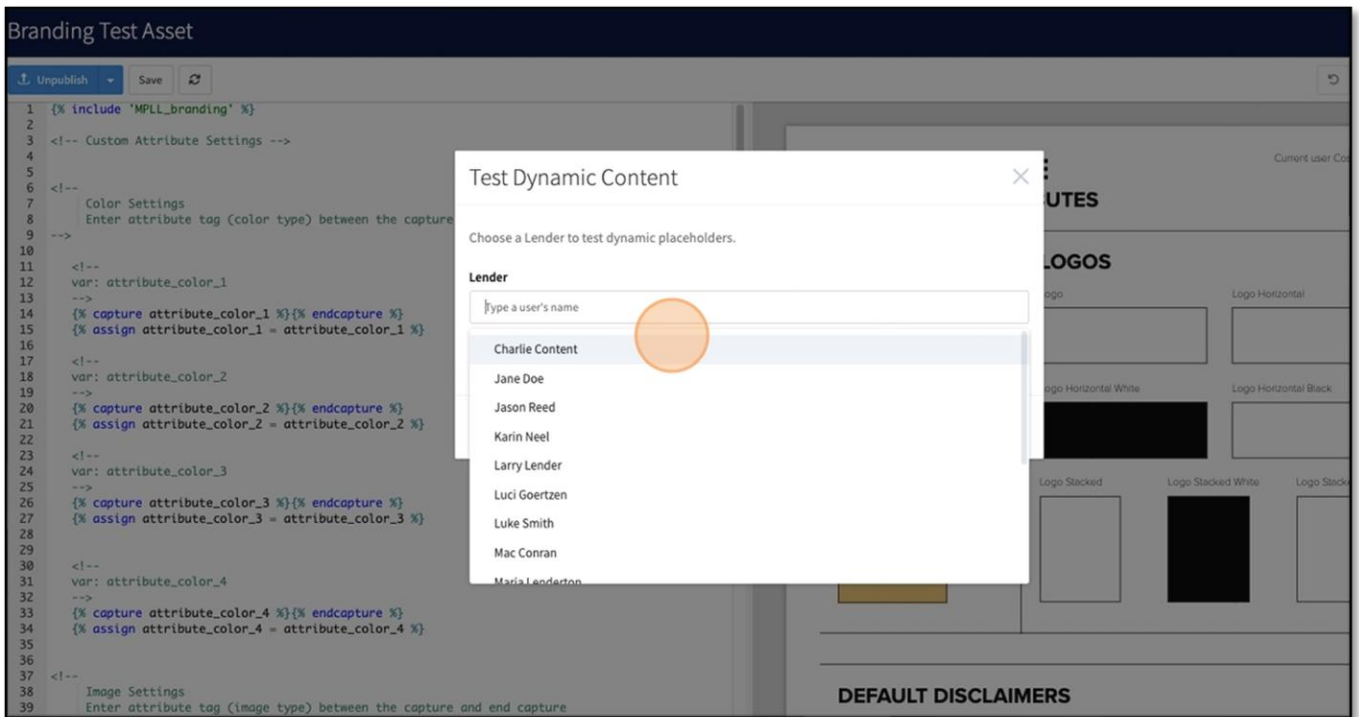
3. In a separate tab, locate the Branding Test Asset and select **Actions** → **Media Settings** to open it.



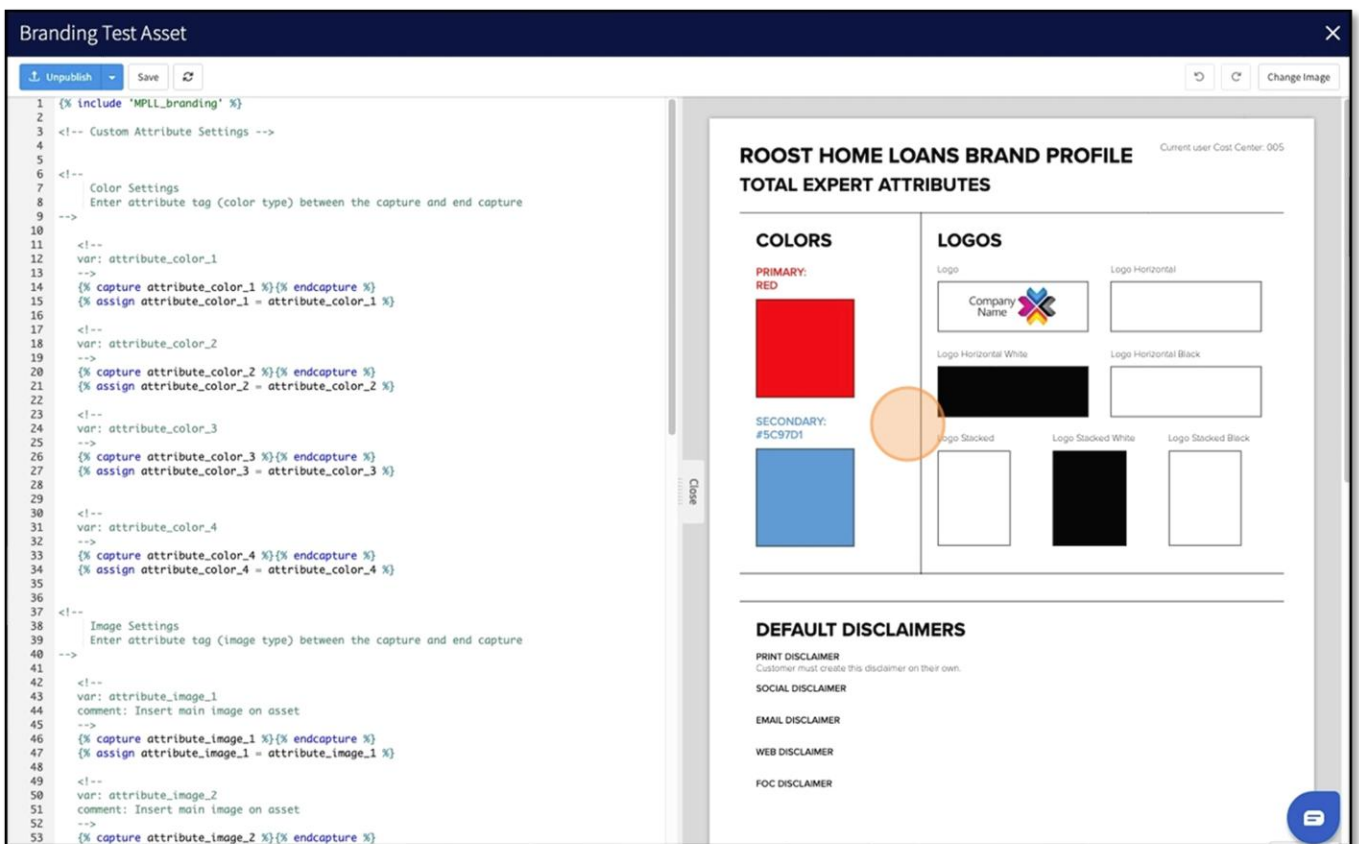
4. On the settings page, click the **Edit Template** button.
5. Do not be alarmed if you see inaccurate branding information populate when the page loads. Click the drop-down button and select **Test Dynamic Content** to select a demo user to test with.



6. In the pop-up box, select the desired demo user.



7. Click the **Update Preview** button.
8. The preview refreshes and populates the branding attributes associated with the demo user's branding configuration (cost center). The top section shows the standard attributes.



9. There are sections for each type of custom attribute on this page. Locate the type for the attribute you want to test. In the example shown, a color is being tested.

Branding Test Asset

Unpublish Save

```
1 {% include 'MPLL_branding' %}
2
3 <!-- Custom Attribute Settings -->
4
5
6 <!--
7   Color Settings
8   Enter attribute tag (color type) between the capture and end capture
9 -->
10
11 <!--
12   var: attribute_color_1
13 -->
14 {% capture attribute_color_1 %}{% endcapture %}
15 {% assign attribute_color_1 = attribute_color_1 %}
16
17 <!--
18   var: attribute_color_2
19 -->
20 {% capture attribute_color_2 %}{% endcapture %}
21 {% assign attribute_color_2 = attribute_color_2 %}
22
23 <!--
24   var: attribute_color_3
25 -->
26 {% capture attribute_color_3 %}{% endcapture %}
27 {% assign attribute_color_3 = attribute_color_3 %}
28
29
30 <!--
31   var: attribute_color_4
32 -->
33 {% capture attribute_color_4 %}{% endcapture %}
34 {% assign attribute_color_4 = attribute_color_4 %}
35
36
37 <!--
38   Image Settings
39   Enter attribute tag (image type) between the capture and end capture
40 -->
41
42 <!--
```

ROOST HOME LOANS BRAND PROFILE
TOTAL EXPERT ATTRIBUTES

COLORS

PRIMARY:
RED

SECONDARY:
#5C97D1

LOGOS

Logo

Logo Horizontal

Logo Horizontal White

Logo Horizontal Black

Logo Stacked

Logo Stacked White

Logo Stacked Black

DEFAULT DISCLAIMERS

PRINT DISCLAIMER
Customer must create this disclaimer on their own.

10. Paste in the attribute tag you copied in step 2.

Unpublish Save

```
{% include 'MPLL_branding' %}

<!-- Custom Attribute Settings -->

<!--
  Color Settings
  Enter attribute tag (color type) between the capture and end capture
-->

<!--
var: attribute_color_1
-->
{% capture attribute_color_1 %}{% endcapture %}
{% assign attribute_color_1 = attribute_color_1 %}

<!--
var: attribute_color_2
-->
{% capture attribute_color_2 %}{% endcapture %}
{% assign attribute_color_2 = attribute_color_2 %}

<!--
var: attribute_color_3
-->
{% capture attribute_color_3 %}{% endcapture %}
{% assign attribute_color_3 = attribute_color_3 %}
```

ROOST
TOTAL EXPERT

COLOR

PRIMARY:
RED

SECONDARY:
#5C97D1

11. Click the **Refresh Preview** button.

Branding Test Asset

Unpublish Save Refresh Preview

```
1 {% include 'Main' %}
2
3 <!-- Custom Attribute Settings -->
4
5
6 <!--
7   Color Settings
8   Enter attribute tag (color type) between the capture and end capture
9 -->
10
11 <!--
12   var: attribute_color_1
13 -->
14 {% capture attribute_color_1 %}{{ brand_tertiary_color }}{% endcapture %}
15 {% assign attribute_color_1 = attribute_color_1 %}
16
17 <!--
18   var: attribute_color_2
19 -->
20 {% capture attribute_color_2 %}{{ endcapture %}
21 {% assign attribute_color_2 = attribute_color_2 %}
22
23 <!--
24   var: attribute_color_3
25 -->
26 {% capture attribute_color_3 %}{{ endcapture %}
27 {% assign attribute_color_3 = attribute_color_3 %}
28
29 <!--
30   var: attribute_color_4
31 -->
32 {% capture attribute_color_4 %}{{ endcapture %}
33 {% assign attribute_color_4 = attribute_color_4 %}
34
35
36 <!--
37   Image Settings
38   Enter attribute tag (image type) between the capture and end capture
39 -->
40
41
42
```

ROOST HOME LOANS BRAND PROFILE

TOTAL EXPERT ATTRIBUTES

COLORS

PRIMARY: RED

SECONDARY: #5C97D1

LOGOS

Logo

Logo Horizontal

Logo Horizontal White

Logo Horizontal Black

Logo Stacked

Logo Stacked White

Logo Stacked Black

DEFAULT DISCLAIMERS

PRINT DISCLAIMER

Customer must create this disclaimer on their own.

12. Scroll down to the Custom Attributes section. Here you will see Tertiary Color populate.

Attribute Settings -->

Settings

attribute tag (color type) between the capture and end capture

```
attribute_color_1
re attribute_color_1 %}{{ brand_tertiary_color }}{% endcapture %}
n attribute_color_1 = attribute_color_1 %}

attribute_color_2
re attribute_color_2 %}{{ endcapture %}
n attribute_color_2 = attribute_color_2 %}

attribute_color_3
re attribute_color_3 %}{{ endcapture %}
n attribute_color_3 = attribute_color_3 %}

attribute_color_4
re attribute_color_4 %}{{ endcapture %}
n attribute_color_4 = attribute_color_4 %}
```

CUSTOM ATTRIBUTES

COLORS

Attribute Color 1: rgb(0,0,255)

IMAGES

TEXT

Test disclaimers, links, or brand-specific text in this section.



13. If you are testing multiple configurations, in a separate tab, open up the demo user you are testing with and change their cost center. In the example shown, the user wants to preview the branding attributes for Horizon Mortgage. Change the cost center and save the user.

City: Pleasantville

State: Minnesota

Zip: 55555

Timezone: Central

Team

Choose Team: Media Testing Group

Business Unit

Cost Center: Roost Home Loans (005)

Location Number: None

Horizon Mortgage (001)

Roost Home Loans (005)

Sunrise Lending (004)

Notifications

Receive Email New Task Notifications? Yes

Receive Email Lead Notifications? Yes

Receive Print Order Reminders? Yes

Reset Password

Send this user a password reset email

Send Email

3rd Party Source Settings

This username is used to pull in leads from 3rd party sources. To use it, take this username@totalexpert.com as the email address setting used for notifications on the service.

For Zillow Tech Connect, this is the username to input into Zillow to make the connection. [Click here for more info.](#)

Username (letters, numbers, or dashes only): charlie.content@mpll-mpll.com

External ID:

14. Switch back to the Branding Test Asset and click the **Refresh Preview** button.
15. The asset now reflects the brand attributes for the Horizon Mortgage branding configuration.



capture and end capture

try_color }}{% endcapture %}

1 %}

}

2 %}

}

3 %}

}

4 %}

capture and end capture


HORIZON MORTGAGE BRAND PROFILE

Current user Cost Center: 001


TOTAL EXPERT ATTRIBUTES

COLORS

PRIMARY:
RGB(19, 44, 69)




SECONDARY:
RGB(72, 144, 189)




LOGOS


Logo




Logo Horizontal




Logo Horizontal White




Logo Horizontal Black




Logo Stacked



Logo Stacked White



Logo Stacked Black



16. Scroll down to see the custom attributes.

'MPLL_branding' %}

m Attribute Settings -->

Settings

attribute tag (color type) between the capture and end capture

tribute_color_1

ure attribute_color_1 %}{ brand_tertiary_color }}{% endcapture %}

gn attribute_color_1 = attribute_color_1 %}

tribute_color_2

ure attribute_color_2 %}{% endcapture %}

gn attribute_color_2 = attribute_color_2 %}

tribute_color_3

ure attribute_color_3 %}{% endcapture %}

gn attribute_color_3 = attribute_color_3 %}

tribute_color_4

ure attribute_color_4 %}{% endcapture %}

gn attribute_color_4 = attribute_color_4 %}



Settings

attribute tag (image type) between the capture and end capture

CUSTOM ATTRIBUTES

COLORS

Attribute Color 1: rgb(222, 198, 64)



IMAGES/LOGOS

TEXT

Test disclaimers, links, or brand-specific text in this section.

27

www.totalexpert.com

©2025 Total Expert Inc. All Rights Reserved.