

Branding & Cost Center Management Guide

This document is designed to help you provide Total Expert with the necessary branding information for your brand(s), ensuring a seamless configuration process in the Total Expert platform.

For Organizations with Multiple Brands, Joint Ventures (JVs), or DBA Entities

If your organization encompasses multiple brands, JVs, or DBA entities, please complete a new line item in this workbook for each distinct brand. Ensure that all brands have information provided in each column. To stay prepared for future adjustments and brand additions, maintain an up-to-date copy of this workbook.

How to Fill Out This Form

- **Cost Center Number** – Enter a numerical value. This specific number can be found on a user's profile page (Business Unit section, Cost Center field). It plays a crucial role in assigning users to specific brands. If your organization operates with only 1 brand, you may leave this field blank.
- **Company Name** – Provide the full name of the company linked to the designated cost center.
- **Primary Color** – Enter a single color value using RGB format (for example: 155, 155, 155) that represents your brand's primary color.
- **Secondary Color** – Enter a single color value using RGB format (for example: 155, 155, 155) that represents your brand's secondary color.
- **Logos** – If possible, provide direct links to your logo files. Alternatively, you can include the logo filenames if you plan to attach the logos to an email along with this workbook.
 - Total Expert recommends using a 2:3 ratio and 300DPI.
 - The file type must be .jpeg, .jpg, .png, or .gif.
 - For a transparent background, a .png file is recommended.
- **Default Logo** – Specify which of the given versions of your logo should serve as the default for your organization. For businesses with multiple brands, Total Expert's best practice is to adopt the same default variation (for example: Color Stacked) across all brands.
- **Disclaimers** – Indicate the name of the disclaimer from your disclaimer library that should be associated with each specific media type. Remember: a single disclaimer can be used for multiple media types.
- **Additional Text Fields** – These fields are only necessary if you plan to use them in custom content. For example, you might include your brand's address or NMLS number, if relevant.
- **Comments** – Use this column to share any comments or notes related to particular cost centers. Add any information that will help Total Expert better understand your branding needs.

Using This Guide for DBA/JV Adjustments or Additions

If you are making brand adjustments or additions, simply update the workbook by including existing brands and any new ones. Highlight the necessary fields to indicate new or adjusted information.