Firm Offer of Credit Disclaimers

When sending a firm offer of credit (FOC) to a potential customer, the flyer naturally includes appropriate disclaimer language. This is created in Total Expert (TE) and provided to the print vendor, DirectMailers, to insert into the selected template along with information from the contact record.

It is important to understand how these disclaimers are constructed so the FOC materials sent to your potential customers do not contain errors.

DirectMailers houses the templates, which each include a placeholder space where the disclaimer will be inserted. DirectMailers takes the disclaimer provided from TE's data push and inserts it into this space.

Warning

DirectMailers takes the disclaimer provided from TE's data push and inserts it into this space as an unformatted text string. Do *not* attempt to include formatting (such as HTML tags) in the disclaimer. Formatting cannot be rendered. You can only use Unicode characters.

For example, if you pass this great offer to DirectMailers, it will not be printed on the FOC material as "this **great** offer"; it will be printed as "this great offer".

Note

The maximum length of the disclaimer depends on the specific template being used. See *Firm Offer of Credit (FOC) Templates (Email and Print)* for more information on specific templates.

To send data from TE to DirectMailers, you must set up an outbound data connector (ODC). You can use this to structure the disclaimer you want to display, but whatever you specify will be assembled in TE before being passed to DirectMailers. This means you *can* use:

- Liquid tags
  - These dynamically pull in information (say, from the relevant user's profile).
  - They are populated in TE to create the full text of the disclaimer before anything is sent to DirectMailers.
  - Example: `{{user.f_name}}`
- References to TE snippets
  - These are created in TE with the purpose of using the same text in multiple places.
  - They can include Liquid tags.
  - Example: `{% include 'system_name' %}`, where `system_name` is the system name of the particular template snippet.

For more information on setting up an ODC, contact your implementation manager or customer success manager.