



Co-Marketing Requests

Table of Contents

- Co-Marketing in Total Expert..... 1
- Sending a Request 1
- Receiving a Request..... 4
 - When You Do Not Have a TE Account Yet 5
 - When You Already Have a TE Account 6
 - After Accepting the Connection..... 7
- Sharing Contacts..... 7

Co-Marketing in Total Expert

Connecting with co-marketing partners in the Total Expert (TE) platform creates value for both partners. By including both users’ contact information on marketing materials, each has the opportunity to be seen by the other’s contacts and new potential customers through email, online, and print channels.

Co-marketing partners can include real estate agents, builders, lawyers, or anyone else who could help you get your brand in front of people who are searching for a mortgage.

If you do not already have a TE account through your organization, and you are invited to co-market, you can sign up for a free account. This 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. Free accounts come with limited features but can be upgraded to paid individual accounts with access to even more tools.

Sending a Request

To send a co-marketing request:

1. Create the person as a contact in your contact list.
 - a. Click the **Add Contacts & Connections** button (plus symbol) in the header of any page and select **Create Contact**.
 - b. Enter as much information as you have about the person. At a minimum, you must provide first name, last name, and email address.
 - c. Click the **Save** button at the top of the page.
2. Select **Co-Marketing Partners** from the navigation menu.
3. Click the **Invite New Connections** button at the top of the page.
4. In the Create Co-Marketing Connection(s) dialog box, begin typing the name of the contact you just added.
5. Select the name from the drop-down menu when it appears.
6. Click the **Next** button.



Note

At this stage, depending on your organization's setup, you may see further setup options for the contact (steps 7–12 below), or you may be routed directly to customizing the email invitation (step 13 below). Even when these steps are available, they are not required to send a co-marketing invitation.

7. (optional) Fill in any additional general information about the contact.
8. Click the **Next** button.

The screenshot shows a web form titled "Create Co-Marketing Connection(s)" with a progress bar at the top. The progress bar has five steps: 1. Contact Selection (active), 2. General Info, 3. MLS Info, 4. Images, and 5. Invitation. The main content area is titled "Let's add some general information for Sam Agent" and contains the following fields: First Name (Sam), Last Name (Agent), Company (Realtor Company), Street Address (123 First Street), and Suite / Unit / Building / Floor / Other. At the bottom, there is a "Create Invitation" button on the left and "Previous" and "Next" buttons on the right. A mouse cursor is hovering over the "Next" button.

9. (optional) Fill in any known MLS information about the contact. You will likely need to get this information from the contact directly or have them fill it in themselves later.
10. Click the **Next** button.

The screenshot shows the same web form, now at Step 3: "Let's add some license and MLS information for Sam Agent". The progress bar shows Step 2 as completed and Step 3 as active. The main content area includes a note: "If you don't know this information you may leave it blank." Below this are three optional fields: License Number (optional) with the value "12345", MLS Agent ID (optional) with the value "SAMA123" and a question mark icon, and MLS Association (optional) with a dropdown menu showing "REALTOR Association of Southern Minnesota". At the bottom, there is a "Create Invitation" button on the left and "Previous" and "Next" buttons on the right.

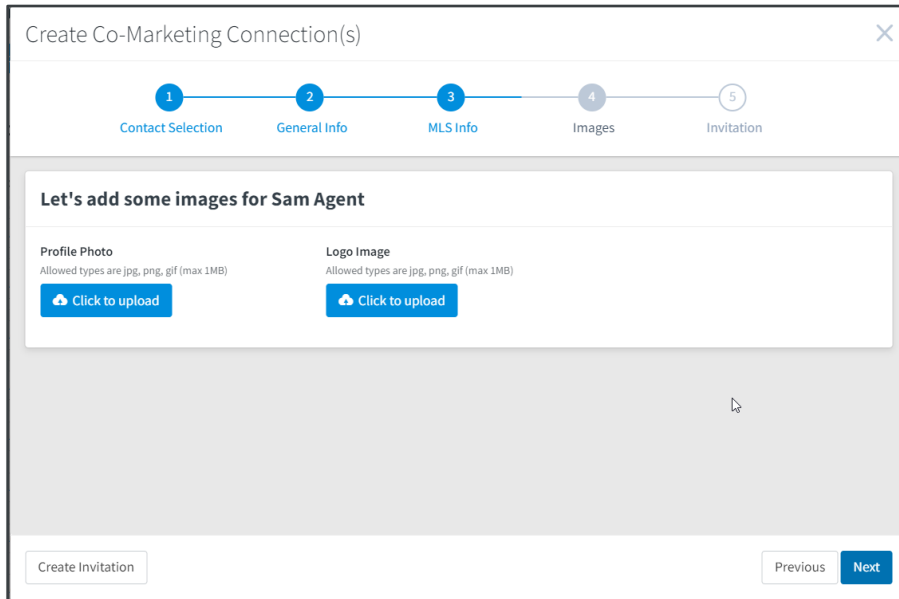
11. (optional) Upload a profile photo and logo image for the contact.



Tip

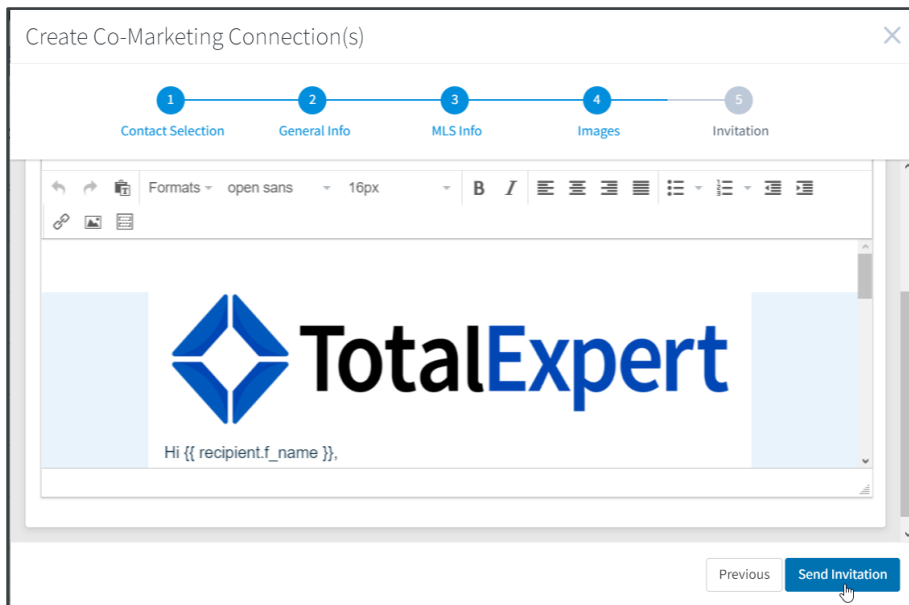
Square (1:1 ratio) images work well for profile images. Logos often use a banner format of 4:1 or 6:1 ratio. For both types, uploaded files must be .jpg, .png, or .gif format and no larger than 1 MB. The .webp format is not supported.

12. Click the **Next** button.



13. (optional) Customize the invitation email.

14. Click the **Send Invitation** button.



The dialog box closes and the Co-Marketing Partners page refreshes. The person you just invited is listed with the status *Pending - Email Not Delivered*. You can check back here periodically to track the progress of your request.

- When the email goes through, the status changes to *Pending - Email Delivered*.



- When the person opens the email, the status changes to *Pending - Email Opened*.
- When the recipient creates a TE account, the status changes to *Active*.

Tip

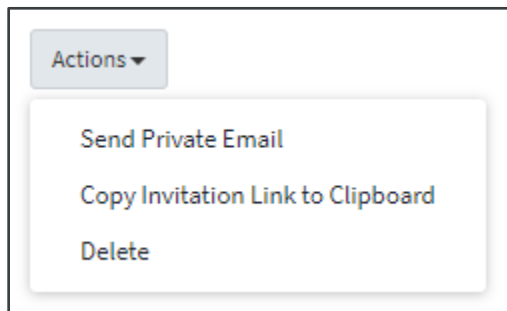
If you speak with the person you are trying to co-market with, and they have not seen the email, have them check their spam folder. The message is listed with the requester's name in the From field and has the subject line "[first name] Invited You to Co-Market on Total Expert!"

Note

You can also request one or more connections from the contact list page by checking the boxes for the contacts and selecting **Actions → Invite to Co-Market**. You then only have to customize and send the invitation.

If the recipient loses the initial email, you can send them a new copy from the Co-Marketing Partners page by selecting **Actions → Send Private Email**.

If you meet with the recipient privately, you can have them accept your request on your device without needing the email. In this case, select **Actions → Copy Invitation Link to Clipboard** and paste the URL into a new browser tab. Then have them follow the instructions under Receiving a Request below.



Warning

In all cases, TE generates a unique link for each co-marketing invitation. Do *not* copy the same link to share with multiple people. Each link will only work for the person it was created for.

When the recipient creates a TE account, the status changes to *Active* and a progress bar appears, indicating how complete their profile information is. Hover the mouse pointer over this bar to see a list of the missing information. You also receive an email notification that your invitation was accepted and you are now connected. You will also receive email updates when your connected partner updates their profile.

Receiving a Request

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.



Hi [redacted],

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](#).

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.
 - e. Click the **Create Account** button.



Let's get started setting up your Total Expert account.

Already have an account? Click [here](#) to sign in.

Please enter information to set up your account.

Email Address

Create Total Expert Password

Confirm Total Expert Password

I authorize collaboration partners to edit my profile information (Collaboration partners will not have access to your contacts).

I have read and agree with the [Terms of Service](#)

Create Account

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.

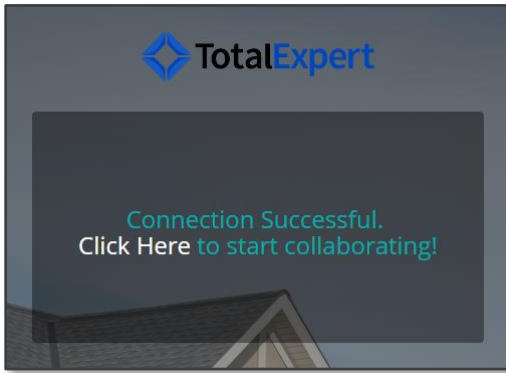
Tip

Enter as much information as you can to start seeing the marketing value 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.



After Accepting the Connection

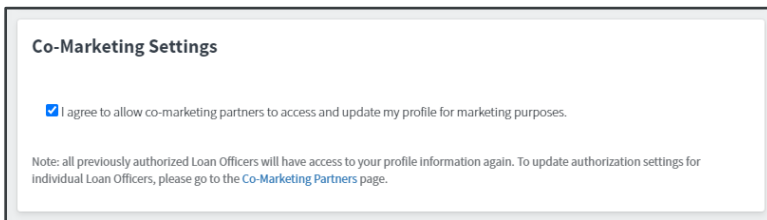
When you log in, click your name in the upper-right corner of the page to open the settings menu and fill in the information on the **Account Settings**, **Marketing Profile**, and **MLS/IDX Settings** pages if you have not already during the signup process. Be sure to click the **Save Changes** button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

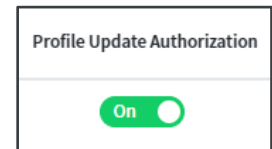
Note

Partners can never change your MLS information, so make sure this is filled out correctly.

Additionally on the Account Settings page, scroll down to the Co-Marketing Settings section and verify that the checkbox is marked if you want co-marketers to update profile information on your behalf.



Then 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 is not marked, the toggle switch in each row is Off and cannot be switched on.)



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.

Action
<input checked="" type="radio"/> Share
<input type="radio"/> Unshare
<input type="radio"/> Assign
<input type="radio"/> Unassign

Select A Team Member