



# Creating Accounts for Co-Marketers

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## Introduction

Total Expert allows you to create account for co-marketing partners and use those accounts to create co-marketing materials without first needing the partner to accept an emailed invitation to create their own account. You can, and should, still send an email, but you are not required to do so because your action has already created the partner account.

However, you cannot send marketing materials to the printer (with cost sharing) until the co-marketing partner has accepted the invitation. (You will see an error if you attempt to send a co-branded document to the printer before the partner accepts the invitation.)

### Note

It remains Total Expert's position that users should *always* send an email invitation to any and all co-marketing partners with whom they are partnering. Total Expert understands this is not always practical and has updated the co-marketing partner registration process to make it easier for loan officers to connect with co-marketing partners and collaborate in the platform.

Creating a partner account allows you to create examples of co-branded marketing materials, so you can better demonstrate the benefits of partnering in the Total Expert platform.



The ability for a user to create an account for a co-marketer has been part of all Total Expert customer implementations since mid-2024. If your organization has used Total Expert since before that time and you are not able to complete the steps described below, contact your Customer Success Manager for more information.

## Inviting a New Co-Marketing Partner

A new co-marketing partner is one who is not already a co-marketing partner connected with another Total Expert user.

There are 2 ways to begin the co-marketing process:

1. From the Co-Marketing Partners page (select **Co-Marketing Partners** from the navigation menu)
  - a. This works whether or not the desired co-marketing partner is already one of your contacts.
2. From the Contacts list (**Leads & Contacts** → **Contacts**)
  - a. This only works if the desired co-marketing partner is already one of the user's contacts.

Both of these processes are described in detail below.

### From the Co-Marketing Partners Page

1. Select **Co-Marketing Partners** from the navigation menu.
2. Click the **Invite New Connection** button. The Create Co-Marketing Connection box opens.
  - a. On the first step of this box, you can search for existing Total Expert contacts by name or type in the email address for the co-marketing partner you want to co-market with.

Create Co-Marketing Connection

Enter your connection's email address for Co-Marketing

smith.john@example.com X

Next

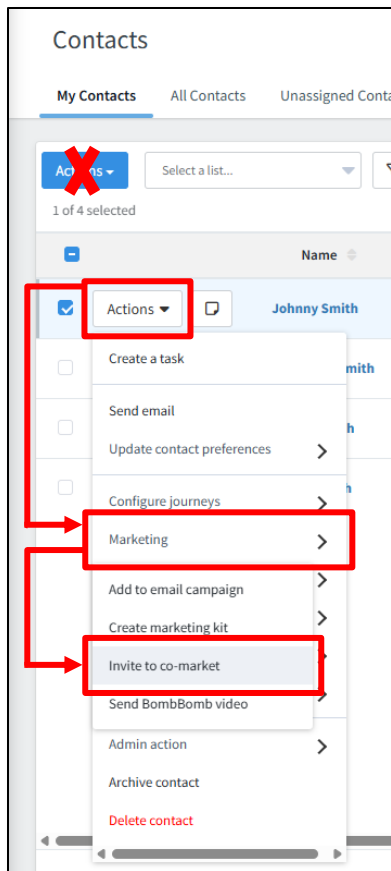
3. Click the **Next** button after entering the name or email address.

From this point, continue with Pre-Filling Profiles below.

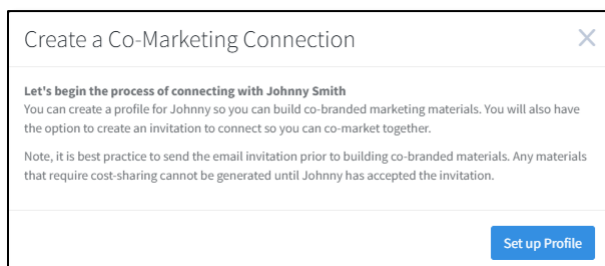


## From the Contacts List

1. Navigate to **Leads & Contacts → Contacts**.
2. Locate the contact you want to co-market with in the list. You can only do this with 1 contact at a time.
3. In the contact's row, select **Actions → Marketing → Invite to co-market**. (This option does not appear in the Actions menu above the list, because you cannot perform this action for more than 1 contact at a time.)



4. Click the **Set up Profile** button.



From this point, continue with Pre-Filling Profiles below.

## Pre-Filling Profiles

Fill out the form with the partner's information. All the fields in the form are optional.

**Note**

Only one profile can be pre-filled at a time.

If the selected contact has any of the following information in their profile, it is populated into the profile setup form for you.

1. Enter the following information into the profile on behalf of the partner:
  - a. First Name
  - b. Last Name
  - c. Company
  - d. Street Address
  - e. Suite/Unit/Building/Floor/Other
  - f. City
  - g. State
  - h. Zip
  - i. Job Title
  - j. Office Phone
  - k. Mobile Phone
  - l. Time Zone
2. Click the **Next** button.
3. Fill out the partner's MLS and license information:
  - a. License Number
  - b. MLS Agent ID
  - c. MLS Association
4. Click the **Next** button.
5. Upload images for the partner's account:
  - a. Profile Photo
  - b. Logo Image

**Note**

If the desired co-marketing partner is an existing contact in the Total Expert platform, the information you enter as part of the pre-fill process will *not* update the original contact record but *will* be reflected in the new user account.

6. Click the **Next** button.
7. At this point, you can either:
  - a. Send an email to the co-marketing partner (select the **Yes, send email** option).
    - i. The account will be created and an email will be sent to the co-marketing partner inviting them to set up their account with Total Expert and partner with you.
  - b. Just create their account (select the **No, don't send email; I'll reach out directly** option).
    - i. The account will be created.



Create Co-Marketing Connection

1

Contact Selection

2

General Info

3

MLS Info

4

Images

5

Review and Confirm

Let's create Johnny Smith's co-marketing account

You will be able to create co-marketing materials immediately after account creation.

CO-MARKETING PARTNER

Name

Johnny Smith

Email Address

smith.john@example.com

Send email notification to Johnny Smith that account is created? \*

☒ Yes, send email ☐ No, don't send email; I'll reach out directly

Previous

Confirm and Create Account

8. Click the **Confirm and Create Account** button.

The co-marketing partner's account is created, and you are free to create any co-branded marketing materials with the partner and share it as usual. The only exception is that you will not be able to send any co-branded materials to a printer; this requires cost sharing, and the co-marketing partner must have accepted the invitation for cost sharing to work correctly. (You will see an error if you attempt to send a co-branded document to the printer before the partner accepts the invitation.)

#### Note

If you are using the MAXA integration, once the partner account is connected to your TE account, it will be synced to your list of co-marketers in MAXA, even if the partner has not finalized the connection. Ensure that you know the status of your connections before creating shared materials.

## Inviting an Existing Co-Marketing Partner

An existing co-marketing partner is a user who is already a co-marketing partner connected with another Total Expert user.

There are 2 ways to begin the co-marketing process:

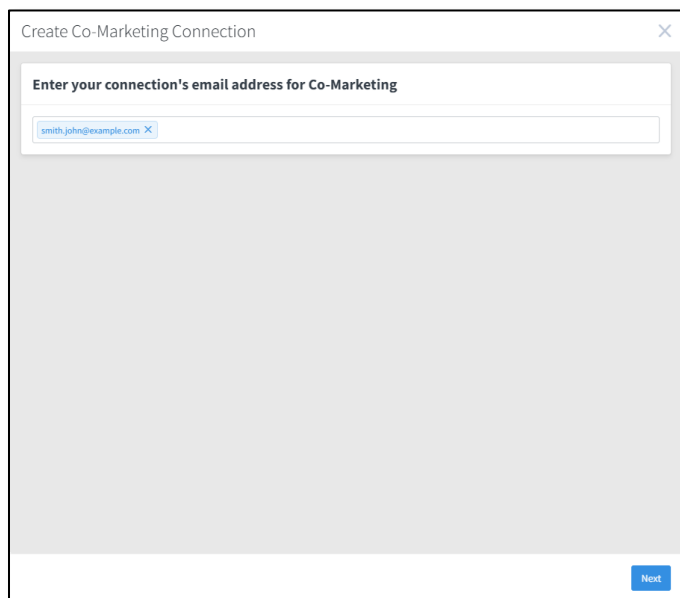
- From the Co-Marketing Partners page (select **Co-Marketing Partners** from the navigation menu)
  - This works whether or not the desired co-marketing partner is already one of the user's contacts.
- From the Contacts list (**Leads & Contacts** → **Contacts**)
  - This only works if the desired co-marketing partner is already one of the user's contacts.



Both of these processes are described in detail below.

## From the Co-Marketing Partners Page

1. Select **Co-Marketing Partners** from the navigation menu.
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  - a. On the first step of this box, you can search for existing Total Expert contacts by name or type in the email address for the co-marketing partner you want to co-market with.

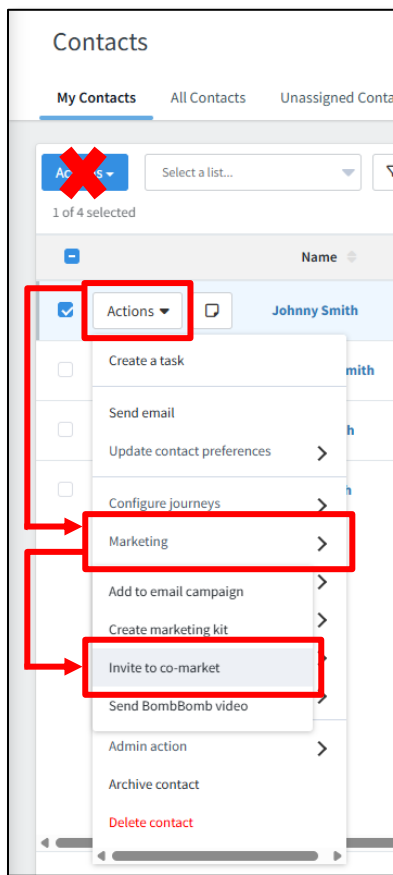


3. Click the **Next** button after entering the name or email address.

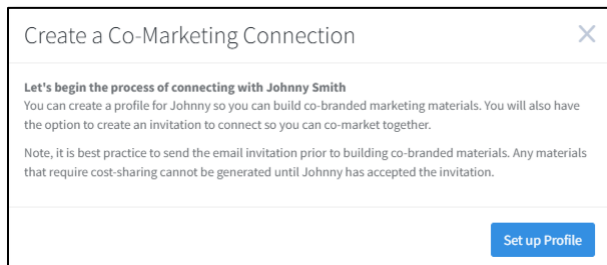
From this point, continue with Linking Accounts below.

## From the Contacts List

1. Navigate to **Leads & Contacts → Contacts**.
2. Locate the contact you want to co-market with in the list. You can only do this with 1 contact at a time.
3. In the contact's row, select **Actions → Marketing → Invite to co-market**. (This option does not appear in the Actions menu above the list, because you cannot perform this action for more than 1 contact at a time.)



4. Click the **Set up Profile** button.



From this point, continue with Linking Accounts below.

## Linking Accounts

For an existing co-marketing partner, you do not get the opportunity to provide profile information.

1. You can either:
  - a. Send an email to the co-marketing partner (select the **Yes, send email** option).
    - i. Your account will be linked to the co-marketing partner's account and an email will be sent to the co-marketing partner inviting them to partner with you.
  - b. Just link your accounts (select the **No, don't send email; I'll reach out directly** option).
    - i. Your account will be linked to the co-marketing partner's account.



Create Co-Marketing Connection

1

Contact Selection

2

Review and Confirm

Let's connect with this contact

this contact is already an agent user in the Total Expert system. You can still co-market together, but to unlock cost-splitting on print jobs and access to their profile, you'll need to send the agent an email inviting them to partner with you.

CO-MARKETING PARTNER

Name

this contact

Email Address

davesmith@example.com

Send email notification to this contact requesting to partner with you? \*

☒ Yes, send email ☐ No, don't send email; I'll reach out directly

Previous

Confirm and Link Accounts

2. Click the **Confirm and Link Accounts** button.

The co-marketing partner's account has been linked with yours, and you are free to create any co-branded marketing materials with the partner and share it as usual. The only exception is that you will not be able to send any co-branded materials to a printer; this requires cost sharing, and the co-marketing partner must have accepted the invitation for cost sharing to work correctly. (You will see an error if you attempt to send a co-branded document to the printer before the partner accepts the invitation.)

#### Note

If you are using the MAXA integration, once the partner account is connected to your TE account, it will be synced to your list of co-marketers in MAXA, even if the partner has not finalized the connection. Ensure that you know the status of your connections before creating shared materials.

## Viewing Co-Marketing Partner Invitations

You can see your entire list of co-marketing partners by selecting **Co-Marketing Partners** from the navigation menu. On the Co-Marketing Partners page, you can see whether each of your co-marketing invitations has been sent, is pending, or has been accepted.

## Sending the Email Invitation at a Later Time

Whether you have connected with a new co-marketing partner or an existing one, you can send an email to them at any time by navigating to the Co-Marketing Partners page and selecting **Actions** → **Send Email** for the desired partner.



## Statuses

The Status column on the Co-Marketing Partners page indicates whether the connection is successful for each listed partner.

The status of new connections always begins with **Active - Profile Created**.

- This indicates that the partner's profile has been completed, and you can now create co-branded materials with them.
- This status with no other modifiers indicates that the invitation email has been sent and accepted and that the co-marketing partner has logged in to their account. Co-branded materials with cost sharing can now be sent to a printer.
- Anything appended to the **Active - Profile Created** status indicates that the profile is not fully connected, and you cannot send co-branded materials to a printer.

Active - Profile Created

If a status also includes **Email [Additional Status]**:

- This indicates information about an email sent to the co-marketing partner, such as whether it has been sent and whether it has been opened.
- Anything here indicates that the process has not been completed, and you cannot send co-branded materials to a printer.

Active - Profile Created - Email Not Sent

### Note

If you have any connections predating mid-2024, you may see some different statuses, such as **Invitation Link Clicked**. Any status that indicates the profile is not fully connected means that you cannot send co-branded materials to a printer.

You can also view whether the co-marketing partner has allowed you to submit profile updates in the Allows Profile Updates column.

## Registering as a Co-Marketing Partner

When you invite someone to partner with you using Total Expert, that person receives an email with a personalized link.

1. When an invited co-marketing partner clicks the **Click here to accept my invitation** link in the email, they are directed to the co-marketing partner registration wizard. The first step is to verify their email address.



Please Verify Your Email

We'll send you a message with a link to create your Total Expert account.

Email Address

Send Email

Already have an account? [Login here.](#)

[About Total Expert](#) [Terms of Service](#) [Privacy Policy](#)

2. They must enter their email address in the form and click the **Send Email** button.
3. This generates a second email, where the partner must click the **Create your account** button.
  - a. This link in the second email expires after 30 minutes. If they wait longer than 30 minutes they will be redirected to confirm their email address again, thereby generating another email. The inviting user can also resend the initial email.

**Note**

This is similar to the password reset process, which is why there is a timeout and additional confirmation.

4. From this point, the partner can simply follow the prompts to set up their account.