



Upgrading a Free TE Account

A member of a paying organization can invite a person outside their organization to sign up for a free account with Total Expert. Sending an invitation email from within Total Expert generates a unique registration link. When you, the invited party, follow this link and complete the form, your new account is automatically linked with theirs as a co-marketing partner.

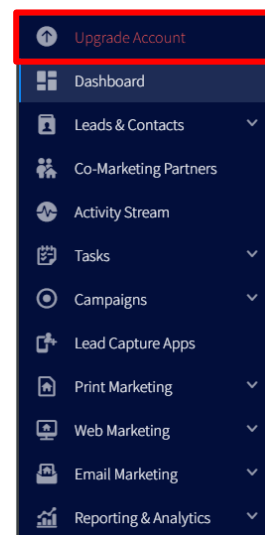
- Your new user is not counted against their organization's user limit; you are not part of their organization.
- You are able to keep the new account indefinitely at no cost, even if you change agencies.
 - You have the option to upgrade to a paid account at any time, but there is no obligation.

A user with a free account sees an **Upgrade Account** option at the top of the navigation menu. (Users with paid accounts do not see this option.) Clicking this option takes you to a page listing the features of free accounts and the benefits of upgrading to a paid account.

Note

This helps differentiate between the two levels for compliance purposes.

- If you do not want to upgrade, simply take no action and continue to use Total Expert's free features.
- If you want to upgrade, click the **Purchase Upgrade** button at the bottom of the feature comparison page. This opens a new email in your standard email program directed to Total Expert's sales team to begin the upgrade process.



Grow Your Business With Total Expert

Our Complimentary solution provides all the tools you need to grow your business

Total Expert's Complimentary Agent offering provides the tools and resources to deliver professional co-marketing, automate multi-channel marketing, all with integrations to the tools you use every day.

Your Complimentary plan includes:

- Unlimited inbound co-marketing connections
- Access to the Total Expert CRM
- Open House lead capture app
- Single property websites
- Home valuation landing pages
- Print marketing ordering and shipping tools
- Marketing automation tools like lead follow-up, SMS, and drip e-mail campaigns
- Integrations with Gmail, Zillow Tech Connect, Office365 and BombBomb

Total Expert Professional Plan

Total Expert's paid offering provides options beyond the complimentary version, including features prioritized lead and contact management using Focused View and the addition of teams:

	Complimentary	Professional
Annual Fee	\$0	\$1,200/user/annually (up-front credit card payment)
Collaboration Teams	Disabled	Up to 20 team members to collaborate in Total Expert
Focused View	Disabled	Build views to organize and prioritize your contacts into daily call lists to focus your efforts
Lead Capture Apps	Open House	Open House and Event Registration

Ready to Upgrade?

To upgrade, you will be required to provide accurate credit card and billing information. There is a standard processing period where Total Expert processes payments prior to activating upgraded account settings.

Purchase Upgrade