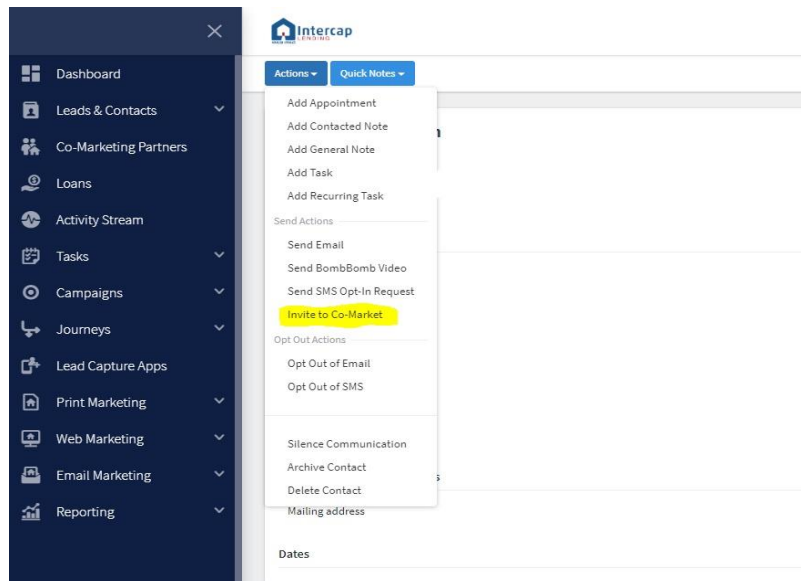


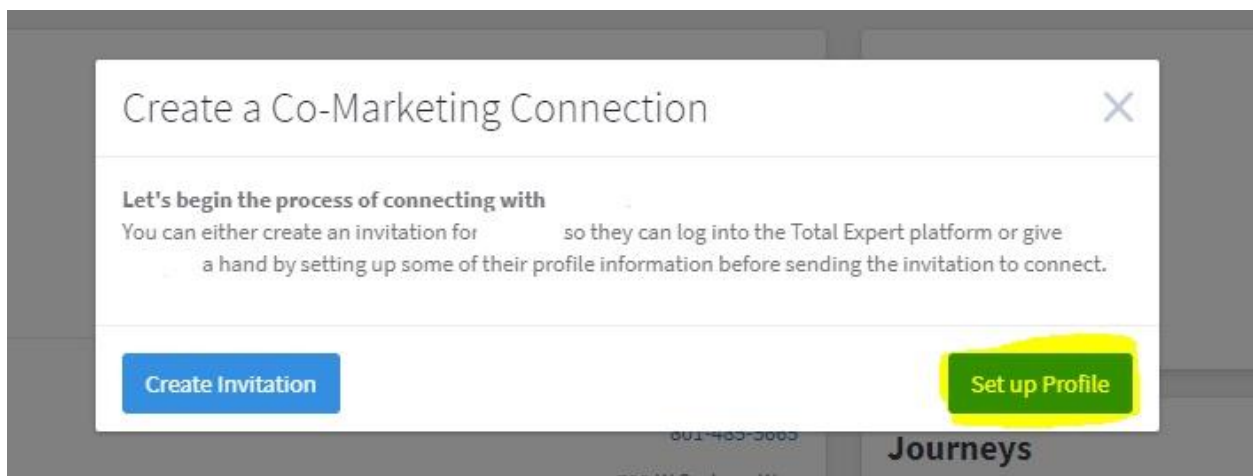
Total Expert Co-Marketer Set-up

Loan Officer View:

- 1) Set up a contact for your Co-Marketing Partner and in the Actions menu, click 'Invite to Co-Market'



- 2) This window will pop up. If you know some information about your Co-Marketing Partner, set up their profile with what you know before sending the invitation.



Create Co-Marketing Connection(s)

1 Contact Selection 2 General Info 3 MLS Info 4 Images 5 Invitation

Let's add some general information for

First Name

Last Name

Company

Street Address

Suite / Unit / Building / Floor / Other

City

State

Zip

Create Invitation Next

Create Co-Marketing Connection(s)

1 Contact Selection 2 General Info 3 MLS Info 4 Images 5 Invitation

Let's add some license and MLS information for

If you don't know this information you may leave it blank.

License Number (optional)

MLS Agent ID (optional) ?

MLS Association (optional)

Select association name

Create Invitation Previous Next

Create Co-Marketing Connection(s) ✕

1 Contact Selection 2 General Info 3 **MLS Info** 4 Images 5 Invitation

Let's add some images for

Profile Photo
Allowed types are jpg, png, gif (max:1MB)
[Click to upload](#)

Logo Image
Allowed types are jpg, png, gif (max:1MB)
[Click to upload](#)

Create Invitation Previous **Next**

Create Co-Marketing Connection(s) ✕

1 Contact Selection 2 General Info 3 **MLS Info** 4 **Images** 5 Invitation


Let's invite **to Co-Market**

Email Subject
{{ sender.f_name }} Invited You to Co-Market on Total Expert!

Email Message

File Edit View Insert Format Table

Formats Verdana 14px B I



Hi {{ recipient.f_name }},

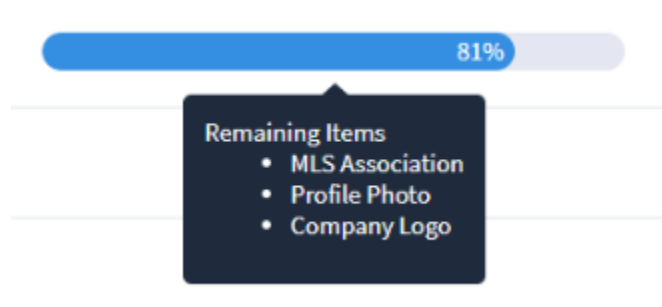
Previous **Send Invitation**

3) Once the Invitation is sent, you can check the status of their profile on the 'Co-Marketing Partners' tab. Here you can see whether they've opened the invitation email, clicked on the invitation link, or started their profile set-up.

Pending - Email Not Delivered

Pending - Email Opened


You can also see the progress they've made on their profile set-up and what things they may be missing.



Co-Marketing Partner View:

- 1) You will receive an email from the Loan Officer inviting you to be a comarketing partner. Click the invitation Link.


Eric Invited You to Co-Market on Total Expert!

 Eric Simonson <eric@intercaplending.com>
To

[↩ Reply](#)

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

[EXTERNAL]



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!

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

- 2) The link will bring you to the Total Expert website and will prompt you to set-up a password for your account. There is a checkmark you can click if you would like the Loan Officer to be able to make changes to your Total Expert Profile. This is optional.

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.

Some information has been pre-populated for you.

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) You will then go through the process of setting up your profile. Some of the information may already be filled in by the Loan Officer, but if any of this is incorrect, feel free to change it. You will also need to upload a profile photo and a company logo. These are important when it comes to co-marketing materials.



Great! Let's finish setting up your account by adding your agent license and MLS information.

Providing this information allows both you and your co-marketing partners quick and easy access to your listings to create co-branded marketing assets faster.

License Number (optional)

MLS Agent ID (optional)

MLS Association (optional)

Select association name

MLS Association Not Listed

[Continue Setting Up Profile](#)

**** These are not optional.
See instructions below.**

- License Number: your real estate license number.
- MLS Agent ID: Found on UtahRealEstate.com. To find...
 - Login to your UtahRealEstate account.
 - Go to the Billing Page

utahrealestate.com/wfrms/billing/

Utah RealEstate.com

Search Clients My Listings CMA Forms Statistics Tools

Search Address Search Agent or Office Search MLS#

Billing

Subscriber Information

Member: [97020]

Status: Active

Office:

Status: Active

Questions?

Phone number: 801-676-5400

[Add/Pay a Service](#) [View Payment History](#)

Current Active Services

Name	Signup Date	Activation Date	End Date
Autopay 1 Month Service Fee (Recurring)	03-01-2020	03-01-2020	

[Add/Pay a Service](#) [View Payment History](#)

Need help?
We are here!

[START CHAT](#)

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All data, including all measurements and calculations of area, is obtained from various sources and has not been, and will not be,

- **MLS Association: UtahRealEstate.com**

Continue with setting up your profile.



Let's add some general information to your profile.

This information will help to provide a detailed description of you when you or your partners create marketing assets within the Total Expert platform.

First Name

Last Name

Company

Address

Suite / Unit / Building / Floor / Other

City

State



Let's add some images to your profile.

These images will be used on any marketing and co-marketing collateral that you or your partners create within Total Expert platform.

Profile Photo

Allowed types are jpg, png, gif (max 1MB)

 [Click to upload](#)

Logo Image

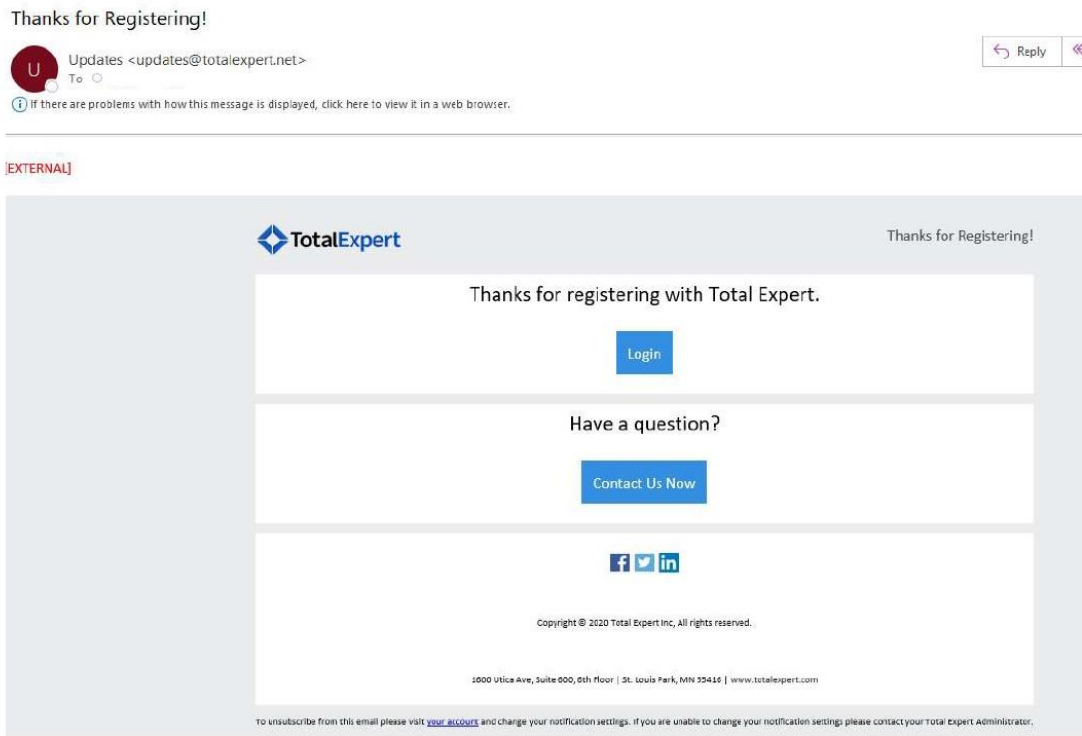
Allowed types are jpg, png, gif (max 1MB)

 [Click to upload](#)

[Previous](#)

[Sign In](#)

- 4) You will receive a second email that is verifying your registration. This includes a link to get to the Total Expert website to log in.



- 5) After completing your profile, click 'Sign in'. You will then be brought to your main dashboard that looks like this.

