Inside a Co-Marketer's Account

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Understanding Types of Accounts

Suppose you want to promote the use of Total Expert to a new potential co-marketing partner or assist a new partner with using their new free account. Either way, understanding the similarities and differences between your full account and a free account will help you promote the value of the platform and support their use of its available features. With greater awareness of how your respective roles are able to use the system, you and your partners will benefit from the increased business opportunities and strengthened relationships.

Note
In this document the term *full account* is used to refer to any account that is part of an organization of licensed Total Expert users. Due to differences in each organization's setup and between roles within an organization, not all full accounts include the same features. This term is used here merely to contrast with a *free account* used by an independent co-marketing partner, which has fewer features and generally more restricted options.

Primary Uses

Your co-marketing partner using a free account has 5 main features available:

1. Single Property Sites
2. Lead Capture Apps
3. Print Marketing
4. Email and Drip Campaigns
5. Contact Management

Each of these features works the same way as it does in your full account, though some aspects may be limited or absent. In addition to these, there are some smaller features they can use, including limited reporting related to contact management and email, tasks, and the activity stream.

Single Property Sites

By navigating to **Web Marketing → Single Property Sites** and clicking the **+Create** button, your co-marketing partner can create a fully functioning single property site.

As with a full account, a free account user must select a property to showcase and be sure to click the **Add** button for both the Agent Partners and Lender Partners fields to include contact information for both parties. On the **Customize** tab, all the same options are available as in a full account. On the **Publish** tab, if they have specified any custom domains on the page at **Web Marketing → Domains**, they can select one where their single property site will be available to their contacts.

Lead Capture Apps

By selecting **Lead Capture Apps** in the navigation menu and clicking the **+Create** button, your co-marketing partner can create a fully functioning lead capture app, though only the Open House and Home Valuation layouts are available. For these layouts, all the same options are available as in a full account.

The Open House layout is a simple form collecting basic contact information and using that to create a contact record. The Home Valuation layout collects specific information about a property in addition to contact information and adds that block of details to the new contact record. This is a great way for a real estate agent to learn who might be in the market to sell their home and work directly with them.

Regardless of layout, any new contact records generated are available to both partners featured on the form.

Print Marketing

By navigating to **Print Marketing → Create New** and selecting **Actions → Select** for a template, your co-marketing partner can initiate a print media order, but only using a template that has been shared with them via a partner with a full account. (The partner does not need to share it manually; this is controlled by access settings applied to the template during setup.)

Free account users cannot create their own content and any orders they place are subject to the same cost split and approval flow settings that would apply if you used the same template and made the same customizations in your full account.

- Every Door Direct Mail (EDDM) postcards are a great way for an agent to advertise Just Sold listings.
- Rate flyers rely on a financial user being integrated with a pricing engine in Total Expert. This means your co-marketing partners would not be able to create one on their own, but they might find it valuable to have one that you created handy as they work with their clients.

Note
Similarly, free accounts can post to integrated social media accounts, but only using content that has been shared with them. Available items to post are listed at **Web Marketing → Social Media → Create New**.

Email and Drip Campaigns

By navigating to **Email Marketing → Emails** and selecting **Actions → Send** for a template, your co-marketing partner can select a saved email template to send. In the email editor, they can select recipients from their contact list and (depending on the settings of the template) may be able to edit the body of the message. They can also schedule an email to send at a selected date and time in the future.

Available saved templates may be shared from a partner's full account, but free account users can create their own by clicking the **Create Email** button. A co-marketing user can also create and send one-off emails without saving a template by clicking the **Send Direct Email** button.

They can create a drip email campaign using any saved email templates by navigating to **Campaigns → Drip Campaigns** and clicking the **+Create** button. Emails in a drip campaign can be set to send out on specified days or in time increments beginning whenever the campaign begins. They can then begin a saved contact on a drip campaign via the Actions menu in the Contacts list.

Contact Management

By navigating to **Leads & Contacts → Contacts**, your co-marketing partner can review much of the same information associated with a contact available to a user with a full account. However, feature-specific, permission-controlled fields (such as those related to loans or campaigns) are not included. Column visibility control, sorting, and filtering are fully functional for any applicable fields.

In addition, some limited actions (such as sending email or assigning to groups) are available for each contact.

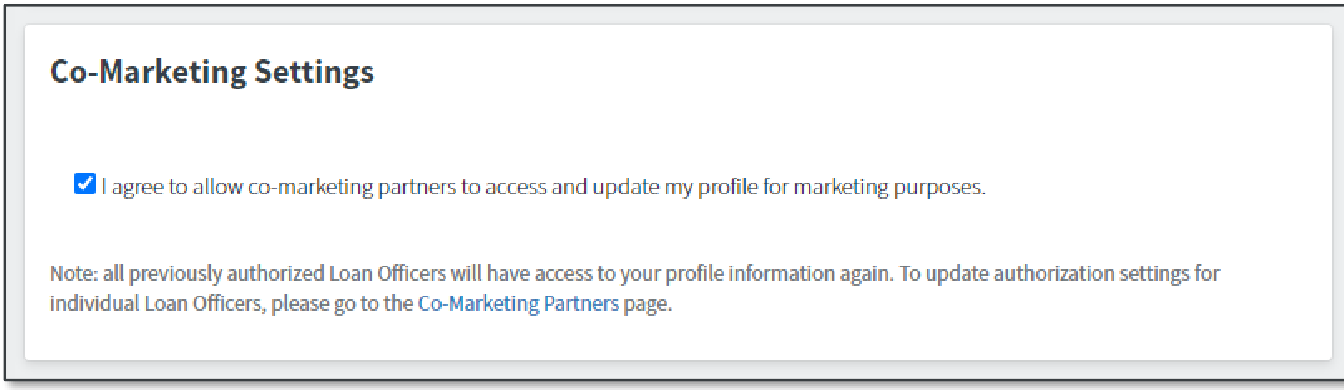
Note
No user, including one with a full account, can delete a contact owned by another user. Nor can any user share or assign a contact that has only been shared with them.

Managing Partnerships

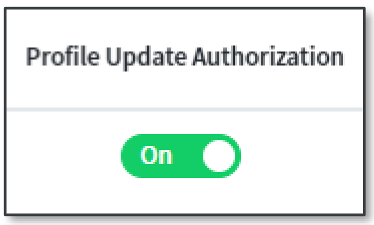
A user with a free account can allow a co-marketing partner with a full account to modify their incorrect account information or fill in blank fields so their marketing profile is as complete and accurate as possible on any co-marketed materials either of you creates. This does *not* allow you to log in on behalf of your partner. Rather, you would see an option to edit on the Co-Marketing Partners page.

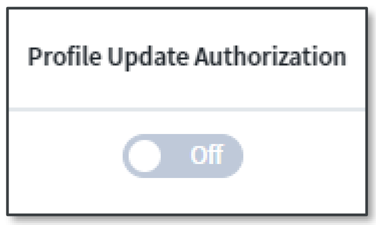
Your co-marketing partner must explicitly complete 2 steps to give you this access:

1. Allow the possibility of any co-marketer modifying their account.
    a. Navigate to **settings menu → Account Settings**.
    b. Scroll down to the **Co-Marketing Settings** sections and check the box. This makes it possible to give individual partners access, but does not give anyone access automatically.
    c. Click the **Save Changes** button.

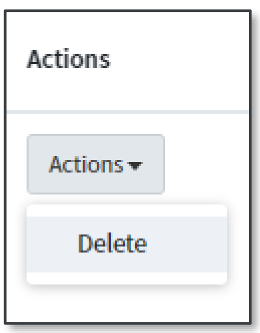


2. Give individual partners access.
   a. Select **Co-Marketing Partners** in the navigation menu.
   b. Toggle the switch under **Profile Update Authorization** to On for any partners who should have access. (The switches in this column are disabled if step 1 has not been completed.) Access can be revoked for a partner at any time by toggling the switch to Off or by terminating the connection.





Either partner may terminate the connection by selecting **Actions → Delete** on the Co-Marketing Partners page. It is possible to re-connect with a partner if a connection is broken inadvertently.



Note
If a connection is broken, your partner keeps access to their free account, but they lose access to any shared materials or templates. Shared contacts are retained by both parties.

Dashboard

Most of the tiles on a free account dashboard are related to generating and maintaining relationships with sales leads. Some, but not all, of these are the same as in a full account. The following tiles are common to free accounts and most full accounts:

- New Contacts
- Open Tasks
- Emails Opened (past 24 hours)
- Co-Marketing Partners

However, because free accounts are primarily tailored to real estate users, the loan-related tiles are not shown. The following tiles are shown on the free account dashboard instead:

- Hot Leads
- Pending Commission
- Recent Uncontacted Leads (Last 2 days)
- Recent Email Click Throughs (Last 2 days)

As with a full account, meaningful information is only presented when the user makes use of the platform.

What Is Not Included

Of course, free accounts do not have access to all the features of a full account. Some notable things not available in a free account include:

- Journeys – Free accounts have no access to create, edit, or use journeys. Journeys cannot be shared with a co-marketing partner the way a print or email template can.
    - If you are operating a journey that includes sending co-marketed email templates, you can select your preferred partner to include on those templates. The partner would have no control over this, however.
- Auto campaigns – As with journeys, free accounts have no access to auto campaigns, but your auto campaigns may include co-marketed materials.
- Focused Vew – Free accounts have no access to view or create any views.
- Loan information – Free accounts do not have visibility into any loan information, even for contacts that have been shared with them.

Note
This is not meant to be an exhaustive list of features not included in a free account.