

Co-Branding ERMA Marketing Materials

This document will cover two important headings; how to set up a realtor's profile for co-branding, and how to co-brand the individual materials that can *be* co-branded. This training is very in depth, but the process is actually very easy and quick as long as information is already correctly entered.

Setting Up a Realtor For Co-Branding

Setting up a realtor for co-branding is simply a matter of making sure specific information is in the realtor's profile in ERMA. Make sure to include the following for a complete profile. If any are missing it won't break anything, but it looks a lot nicer as long as each of those are included.

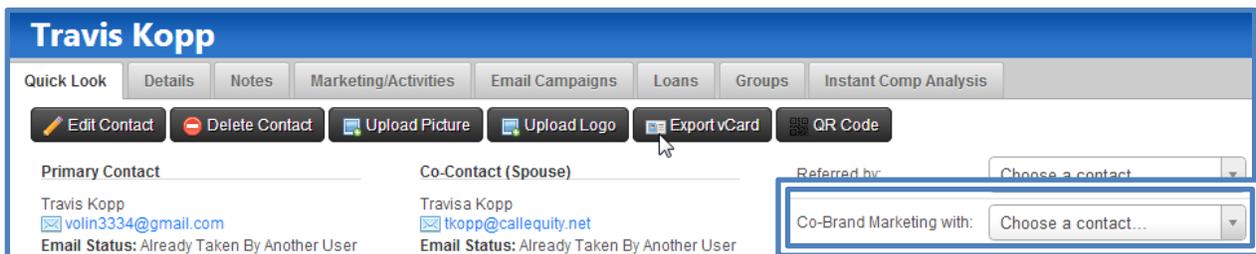
- **First and Last Name**
- **Email Address**
- **Company Name**
- **Title**
- **Work Phone**
- **Company Website**

Once those items are input, you will also want to make sure that the realtor has a picture uploaded. Click on **upload picture, add files**, and after selecting the file on your computer click on **start upload**. For more in depth directions on uploading realtor pictures refer to the specific guide about that.

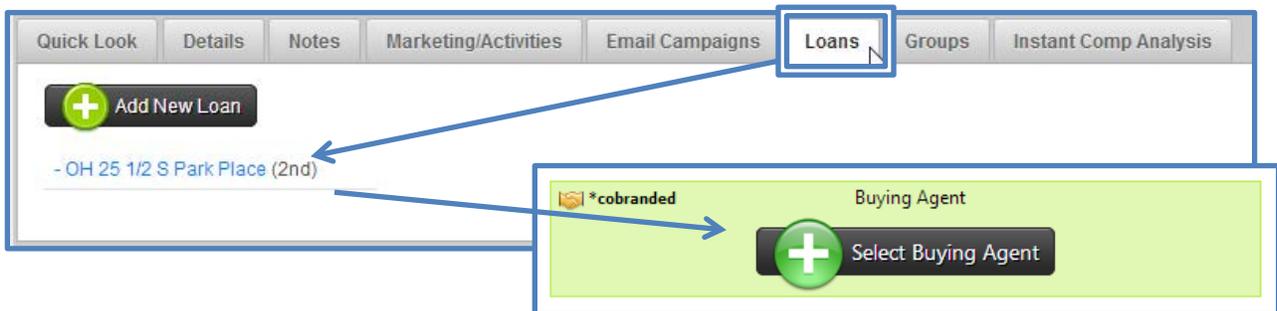
Items That Can Be Co-Branded, And How to Make Sure They Are

Many things that are sent out of ERMA can be co-branded, but it can be a little confusing trying to figure out all of them. Before covering those we should go over the two kinds of co-branding you can select; **profile specific** and **loan specific**.

Profile specific co-brand partners are selected by choosing them under the **Co-Brand Marketing With** dropdown on the client's profile (see the image if you're unsure).



The other kind of co-brand partner is **loan specific**, and that is the buyer's agent on the loan. If not automatically selected, you can manually choose the buyer's agent by going to the contact's profile, clicking on the loans tab, clicking on the loan's link (usually the address) and clicking the **Select Buying Agent** button.



Co-Brandable Materials

- **Email Blasts**
 - Profile Specific (contacts should have **Co-Brand Marketing With** filled in on their profiles)
 - **Allow Co-Brand Marketing** should be selected **yes** in order to co-brand.
 - Please Note: Not all email blasts allow cobrand marketing.
 - Please Note: The email preview will never show co-branding even if every email going out *does*. Do not be concerned if the preview email isn't co-branded.
- **Holiday Videos**
 - Profile Specific (contacts should have **Co-Brand Marketing With** filled in on their profiles)
 - Must be sent out as part of an email blast
- **Physical Mailings (cards, jumbo cards)**
 - Loan Specific (buyer's agent must be selected on the loan)
- **In-Process Videos**
 - Loan Specific (buyer's agent must be selected on the loan)
 - Of Note: If any information in the loan is changed after the video is sent out it will update the video, even after it has been sent. So, if the buyer's or listing agent isn't selected *before* the video is sent, it can be selected *after* the video is sent, and will affect any subsequent views.
- **Campaigns**
 - If *In-Process* or *Post Closed* – Loan Specific
 - If any other phase – Profile Specific
- **Flyers**
 - Not specific to a loan or to a profile – you select the co-brand on flyers
 - Note: The Co-brand is selected by clicking the **Select Co-Brand** button at the top of the flyer.
 - Note: Remember to always click "Print Letter Size" when printing or saving a flyer. Clicking that button will simply give you a pdf of the flyer.