

Agent Co-Branding in FinLocker

Creating an Agent

1. Go to the Agents tab in PFM Admin



2. In Create New Agent section, enter your agents First Name, Last Name, Company Name, Email Address, Phone #, License #, and upload a headshot (headshot must be at least 1601px x 1201px). Note – you will need to verify that the headshot upload is complete before clicking 'Create'.

A screenshot of the 'Agents' management interface. At the top, there's a header 'Agents' with two tabs: 'Create New Agent' (active) and 'Manage Agents'. Below the header, the form is divided into two main sections. The first section contains four input fields: 'First Name' (with placeholder 'Enter First Name'), 'Last Name' (with placeholder 'Enter Last Name'), 'Company Name' (with placeholder 'Enter Agent's Company Name'), and 'Email Address' (with placeholder 'Enter Email Address'). The second section, titled 'Contact Details', features a circular profile picture placeholder with a red 'Agent Photo is required' message below it, a 'Phone Number' input field (placeholder 'Enter Phone Number'), and a 'License' input field (placeholder 'Enter License Number').

3. When uploading the headshot, be sure to use the zoom in/ zoom out tools as need to make the photo fit in the pre-sized rectangle. You can then drag the rectangle to center your image:

Profile Image Editor

×



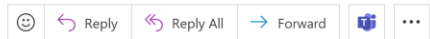
Save

4. Agent will receive an email notifying them that they have been created and to look out for future communications which will include invite info.

Welcome to the Vida network for HomeScout!



FinLocker <no-reply@finlocker.com>
To: ftterryjames@gmail.com



Thu 8/17/2023 4:04 PM

[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email originated from outside of FinLocker. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hello Agent Ethan,

You have been added as a trusted Agent of HomeScout for their app Vida. There's nothing you need to do at this time, just giving you a heads up! Keep an eye out for future communications.

Sincerely,

FinLocker
www.finlocker.com

Creating a co-branded invite link and code



1. Go to the Invites tab in PFM Admin
2. Go to the Link Invite section and click New Link

Invites

All Link Invite Batch Invite Email Invite

[New Link](#)

3. Select the LO in the 'Assign Invitation to' dropdown and select the agent in the 'Assign Agent' dropdown. Name the link, select 'none' for persona type, and set the number of lockers that can be created with the new link/code and then click 'Create Link'.

New link ×

Assign Invitation to: ▼

Assign Agent: ▼

Campaign Identifier:

Persona Type:

No Records Found

Link Name:

Max Number of Lockers:

Sponsor Code: ▼

[Create Link](#)

4. Agent will receive an email with details on your version of FinLocker, as well as their invite information (assigned LO will be cc'd):

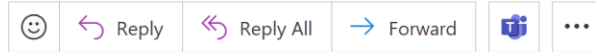
HomeScout Vida: New invitation link



FinLocker <no-reply@finlocker.com>

To flterryjames@gmail.com

Cc Ethan Vieaux



Thu 8/17/2023 4:05 PM

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hello Agent Ethan,

Great news! You have been assigned to an invitation link for HomeScout's Vida app. Here are the details:

Loan Officer: Ethan Vieaux

You're all set to invite your leads to join Vida! There are two ways to do so, and each method is explained below:

Method #1

Provide your lead with your mobile invitation code and links to download the Vida app.

Vida mobile invitation code: 7F633JIS

Vida App download links:

Apple Phones: <https://apps.apple.com/vn/app/vida-by-homescout/id1635630986>

Android Phones: <https://play.google.com/store/apps/details?id=com.homescout.locker>

Method #2

Provide your lead a link to register on a web browser:

<https://vida.finlocker.com/pfm/registration/invite?key=458c8766-0338-4430-8c73-f0cf0d8585c1>

Note – when one of your leads registers for an account using either invite method, you will receive an email notification from no-reply@finlocker.com.

The Vida app is a financial health and wellness tool, designed to guide your clients toward the path to homeownership, no matter where they are on their journey. To learn more about the features and benefits of the app, visit our website at <https://finlocker.com/for-customers/>

You can contact Ethan Vieaux with any questions at ethan.vieaux@finlocker.com.

Sincerely,