

2023 Summer Release



Continuous Innovation

As the leading purpose-built Sales and Marketing platform for financial services, Total Expert is committed to listening to our customer's needs and responding to industry shifts with the latest enhancements and innovations.

With our **quarterly releases**, we deliver enhancements to boost sales productivity, enhance customer engagement, and help your organization build lifelong customer relationships.

Here's a summary of our recent platform enhancements and what we have planned*:

Winter 2023

- Customer Intelligence Rate Alert
- Salesforce Enhanced Integration
- MLS Listing Statuses
- Email Builder Enhancements
- Journey Create Lead Actions
- New Contact Details
- Bulk Task Creation & Changes
- Local Time Zone on Leads
- Finlocker Integration
- Blend Integration Enhancement

Spring 2023

- Analytics: Reporting and Dashboards
- Saved Lists on All Contact View
- Editing Outcomes on Focused View
- Advanced Lead Management
 - SMS Platform Notifications
 - Lead to Voicemail
- Recruiting View on Contact Details
- Instagram Integration
- Milestones Integration
- Capacity Integration
- Lenderprice Integration

Summer 2023*

- Equity Enrichment for CI
- Advanced Lead Management
 - Voicemail Dropping
 - Claimable Leads
- Co-Marketing Partners Search
- Contact Record Memos
- Saved Loan Lists
- Advanced Firm Offer of Credit (FOC)
- Floify Integration
- Simple Nexus Enhanced
- Ingenius Integration

* Not inclusive of all platform enhancements. Future enhancements are subject to change

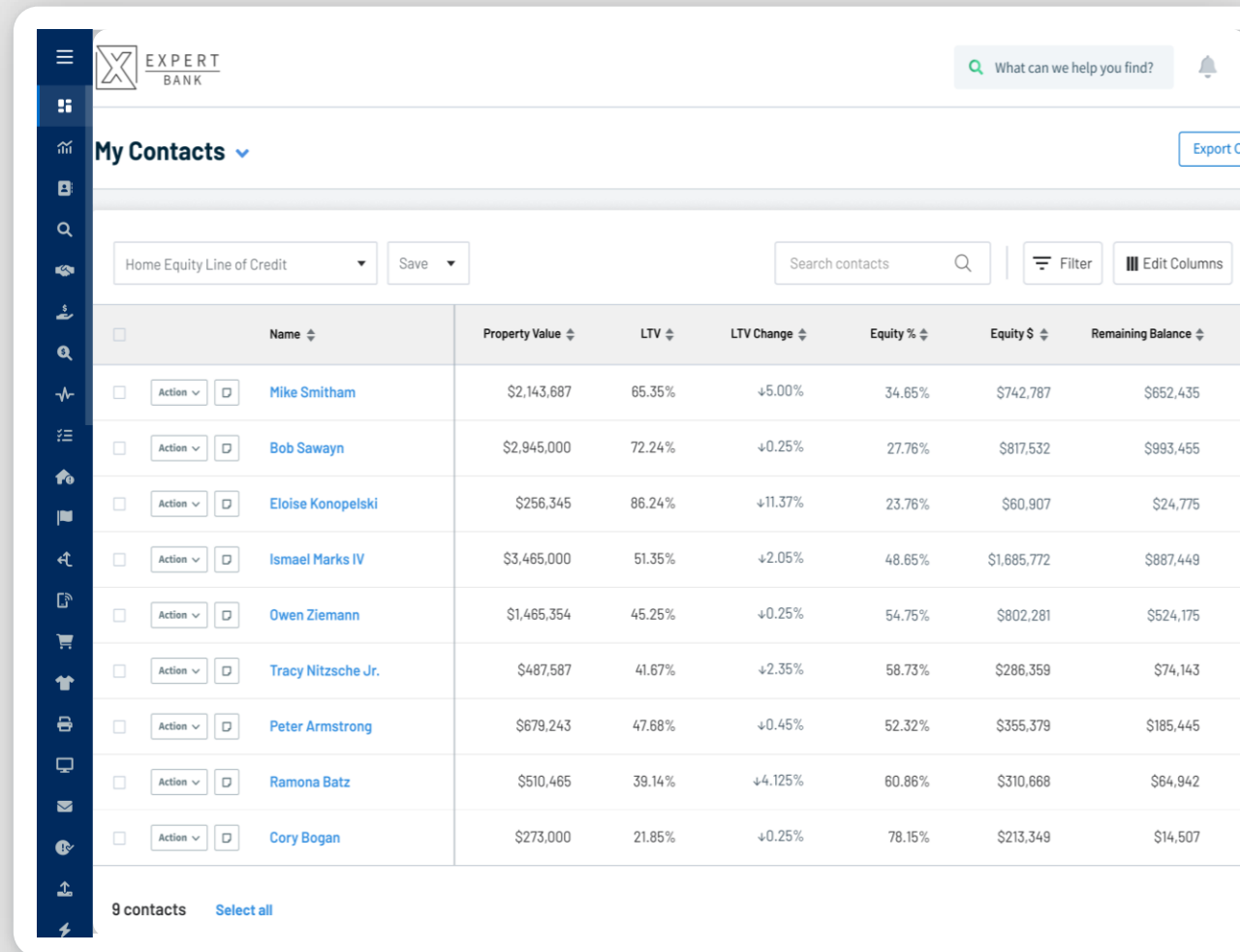
Featured Solutions



GENERATE MORE OPPORTUNITIES

Customer Intelligence: Equity Enrichment

Make data-driven decisions with robust insights on your existing customers home equity status. Uncover more opportunities by sorting, filtering, and grouping contacts through the contact details page.



The screenshot displays the 'My Contacts' interface of EXPERT BANK. At the top, there's a search bar with the placeholder 'What can we help you find?' and a bell icon. Below this, the 'My Contacts' title is followed by a dropdown menu. A filter is set to 'Home Equity Line of Credit' with a 'Save' button. To the right, there's a search bar for contacts, a 'Filter' button, and an 'Edit Columns' button. The main table lists 9 contacts with columns for Name, Property Value, LTV, LTV Change, Equity %, Equity \$, and Remaining Balance. Each row includes an 'Action' dropdown and a document icon. At the bottom, it shows '9 contacts' and a 'Select all' link.

	Name	Property Value	LTV	LTV Change	Equity %	Equity \$	Remaining Balance
<input type="checkbox"/>	Mike Smitham	\$2,143,687	65.35%	+5.00%	34.65%	\$742,787	\$652,435
<input type="checkbox"/>	Bob Sawayn	\$2,945,000	72.24%	+0.25%	27.76%	\$817,532	\$993,455
<input type="checkbox"/>	Eloise Konopelski	\$256,345	86.24%	+11.37%	23.76%	\$60,907	\$24,775
<input type="checkbox"/>	Ismael Marks IV	\$3,465,000	51.35%	+2.05%	48.65%	\$1,685,772	\$887,449
<input type="checkbox"/>	Owen Ziemann	\$1,465,354	45.25%	+0.25%	54.75%	\$802,281	\$524,175
<input type="checkbox"/>	Tracy Nitzsche Jr.	\$487,587	41.67%	+2.35%	58.73%	\$286,359	\$74,143
<input type="checkbox"/>	Peter Armstrong	\$679,243	47.68%	+0.45%	52.32%	\$355,379	\$185,445
<input type="checkbox"/>	Ramona Batz	\$510,465	39.14%	+4.125%	60.86%	\$310,668	\$64,942
<input type="checkbox"/>	Cory Bogan	\$273,000	21.85%	+0.25%	78.15%	\$213,349	\$14,507

9 contacts [Select all](#)

LEAD QUALITY, VOLUME & ROUTING

Customer Intelligence: Advanced FOC

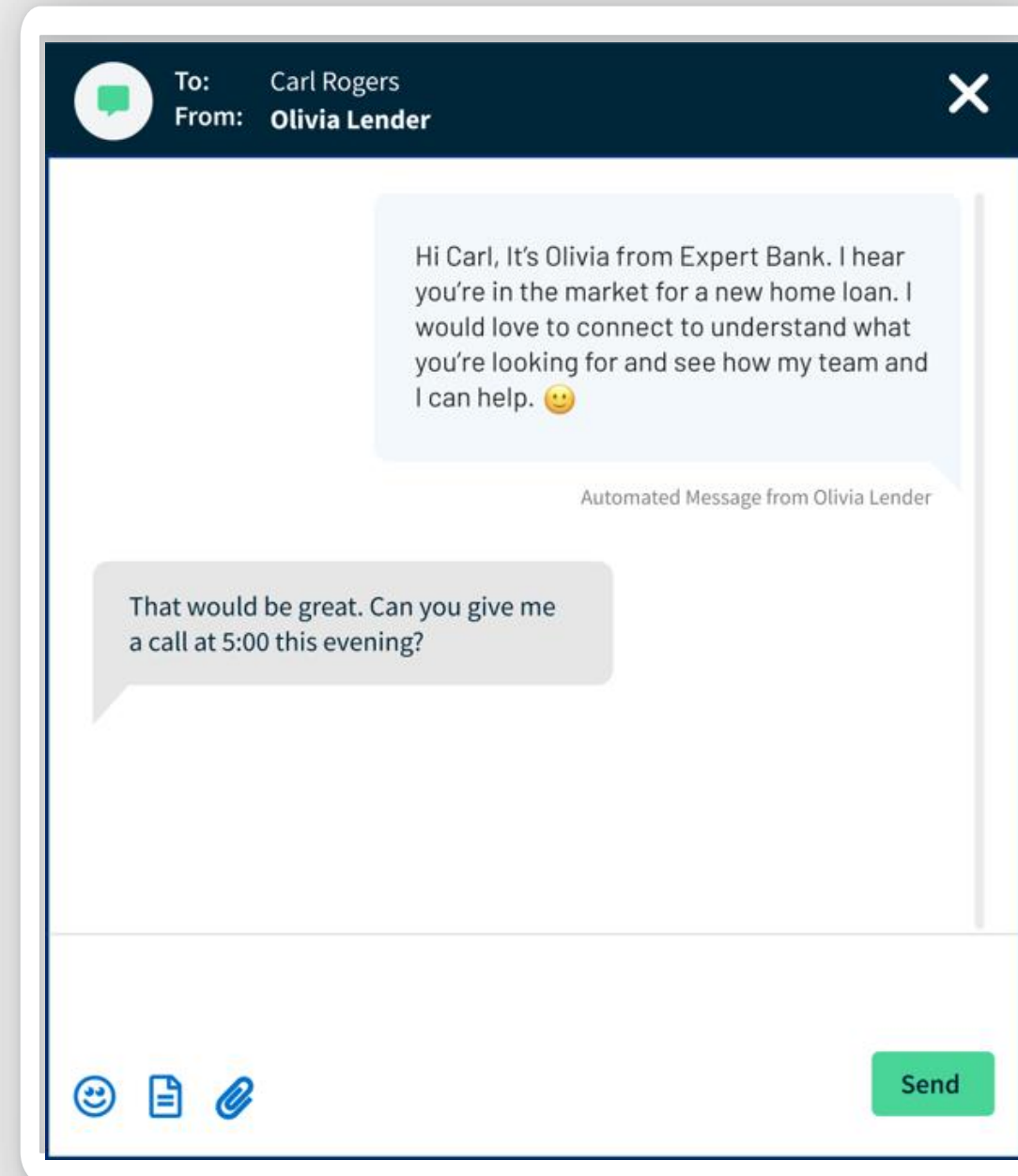
Initiate a Firm Offer of Credit mailer for existing customers directly within Total Expert. When a Credit Alert is triggered, you can respond immediately to customer actions by leveraging pre-built postcards or advanced functionality via Direct Mailers.

The screenshot displays the TotalExpert CRM interface for a customer named Sally Jones. The interface includes a sidebar with navigation icons, a top header with the TotalExpert logo and a search bar, and a main content area. The customer profile for Sally Jones is shown, including her address (1234 Main Street, Lincoln, NE 68521) and phone number (4561234154). A green alert box indicates a "CUSTOMER INTELLIGENCE: CREDIT INQUIRY ALERT" with the message "Sally has had a credit inquiry with another lender." and a creation date of 07/28/2023. Below this, the "Activity" tab is selected, showing a "Note" by Demo Admin with the subject "DirectMail Send Notification:". The note includes the sent date (07/28/2023), estimated delivery date (08/01/2023), and a thumbnail image of a direct mail postcard. The postcard text includes "Cell Phone: 4561234154". The interface also features a "MEMOS" section, a "Tasks (0)" section, and a "Recent Notes" section with a text input field and a "Select Outcome (optional)" dropdown. A bottom right corner shows a chat bubble for Sally Jones.

COMMUNICATE WITH EASE

2-Way SMS*

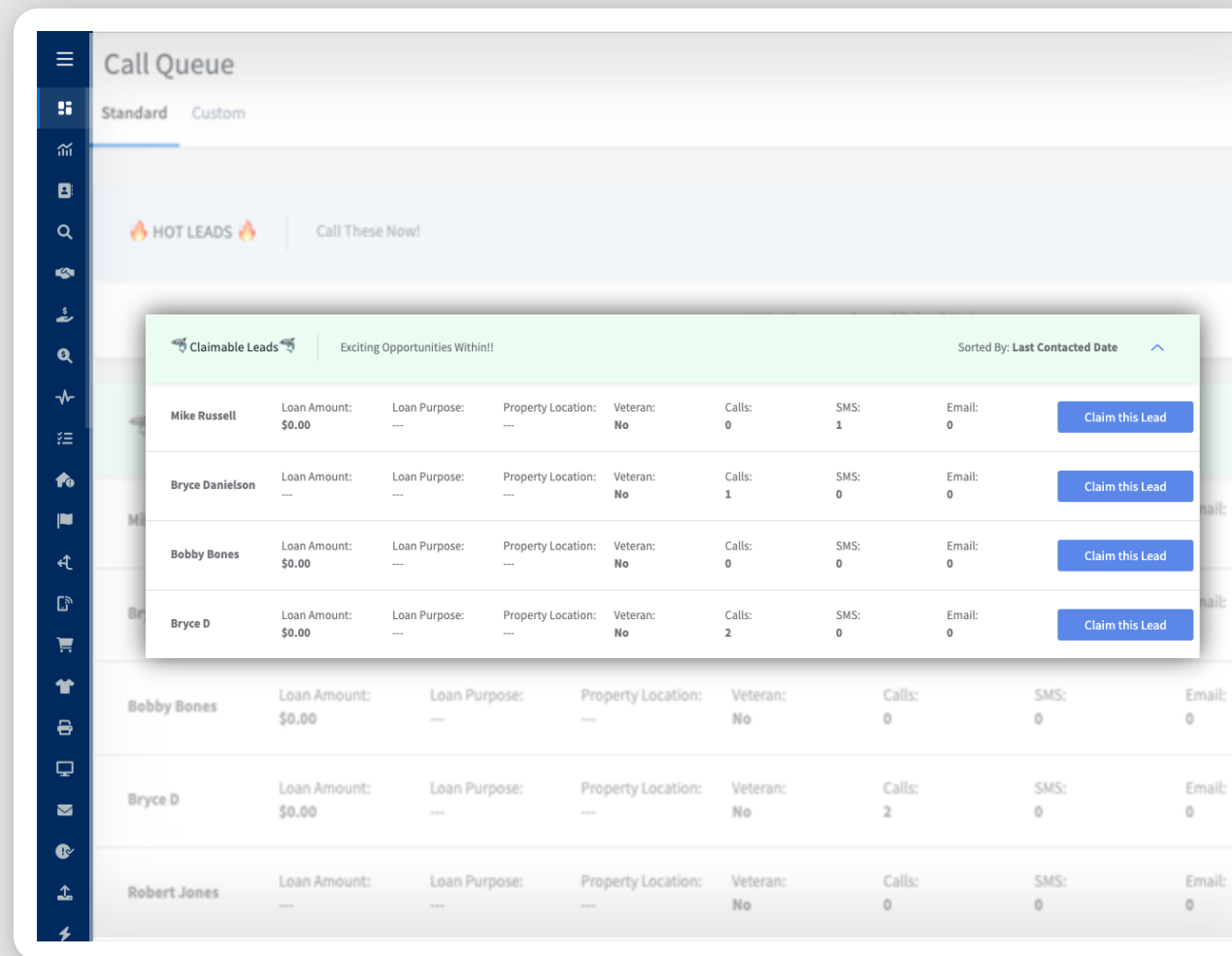
Stay in contact and respond quickly to customer requests with a seamless SMS experience. All communications are centralized within the platform and enables LOs with the ability to quickly refer to the SMS thread over time.



LEAD QUALITY, VOLUME & ROUTING

Advanced Lead Management

Leave no opportunities behind. Advanced Lead Management enables you to surface the right opportunities, at the right time, to the right LO, and provides LOs the tools necessary to convert on those opportunities.



Call Queue

Standard Custom

HOT LEADS Call These Now!

Claimable Leads Exciting Opportunities Within!! Sorted By: Last Contacted Date

Name	Loan Amount	Loan Purpose	Property Location	Veteran	Calls	SMS	Email	Action
Mike Russell	\$0.00	---	---	No	0	1	0	Claim this Lead
Bryce Danielson	---	---	---	No	1	0	0	Claim this Lead
Bobby Bones	\$0.00	---	---	No	0	0	0	Claim this Lead
Bryce D	\$0.00	---	---	No	2	0	0	Claim this Lead
Bobby Bones	\$0.00	---	---	No	0	0	0	
Bryce D	\$0.00	---	---	No	2	0	0	
Robert Jones	---	---	---	No	0	0	0	

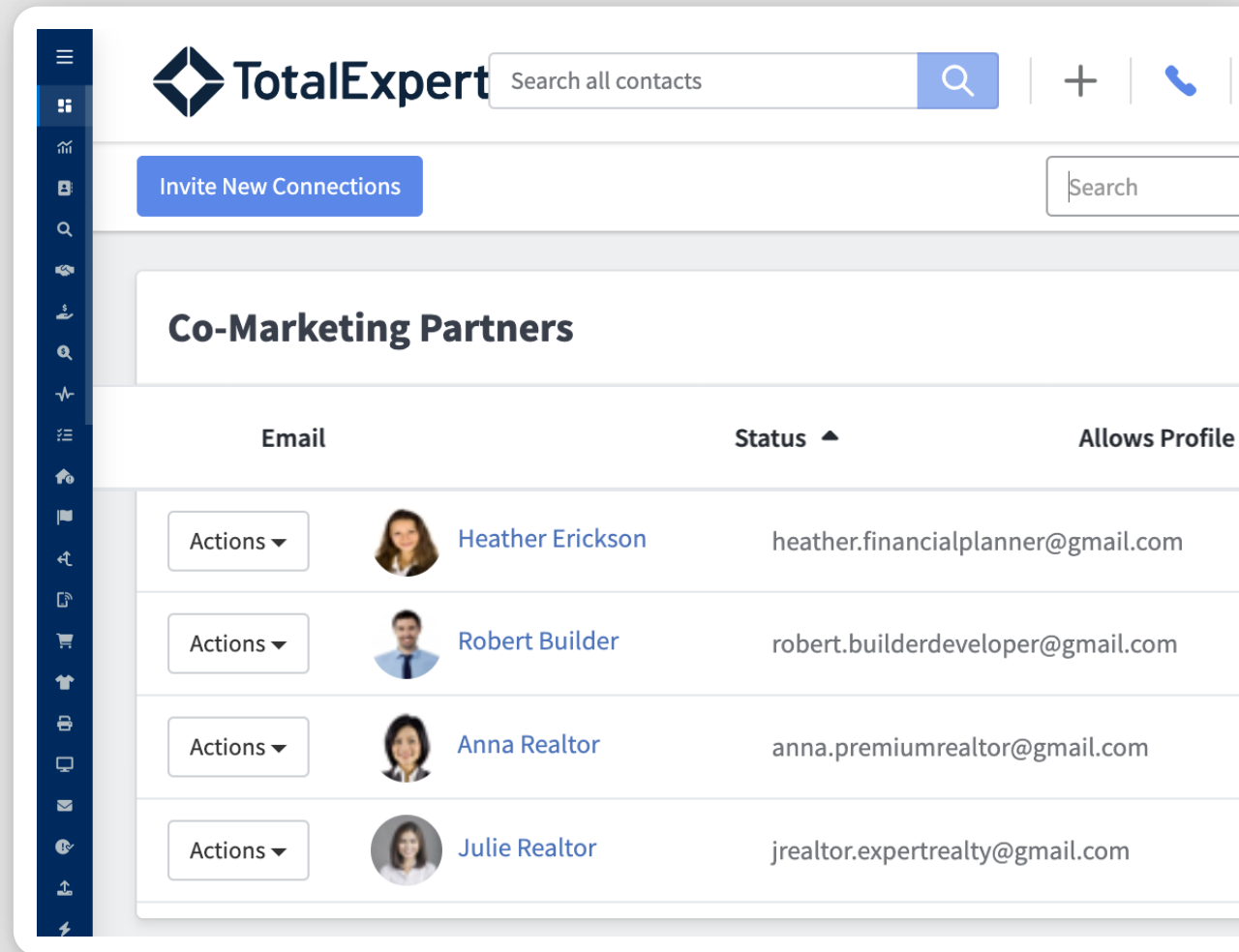
Platform Optimizations



IMPROVE SALES PRODUCTIVITY

Co-Marketing Partner Search

Easily find you co-marketing and referral partners within the platform by using the new search bar on the co-marketing partners' page. Co-marketing partners can be found by searching either their name or by email address.



IMPROVE SALES PRODUCTIVITY

Saved Loan Lists

To boost sales productivity, users can more easily locate loans by creating and saving loan lists via the Loans page. Avoid having to navigate off platform to view loan details and immediately see the most important loans by saving preferred lists for future access.

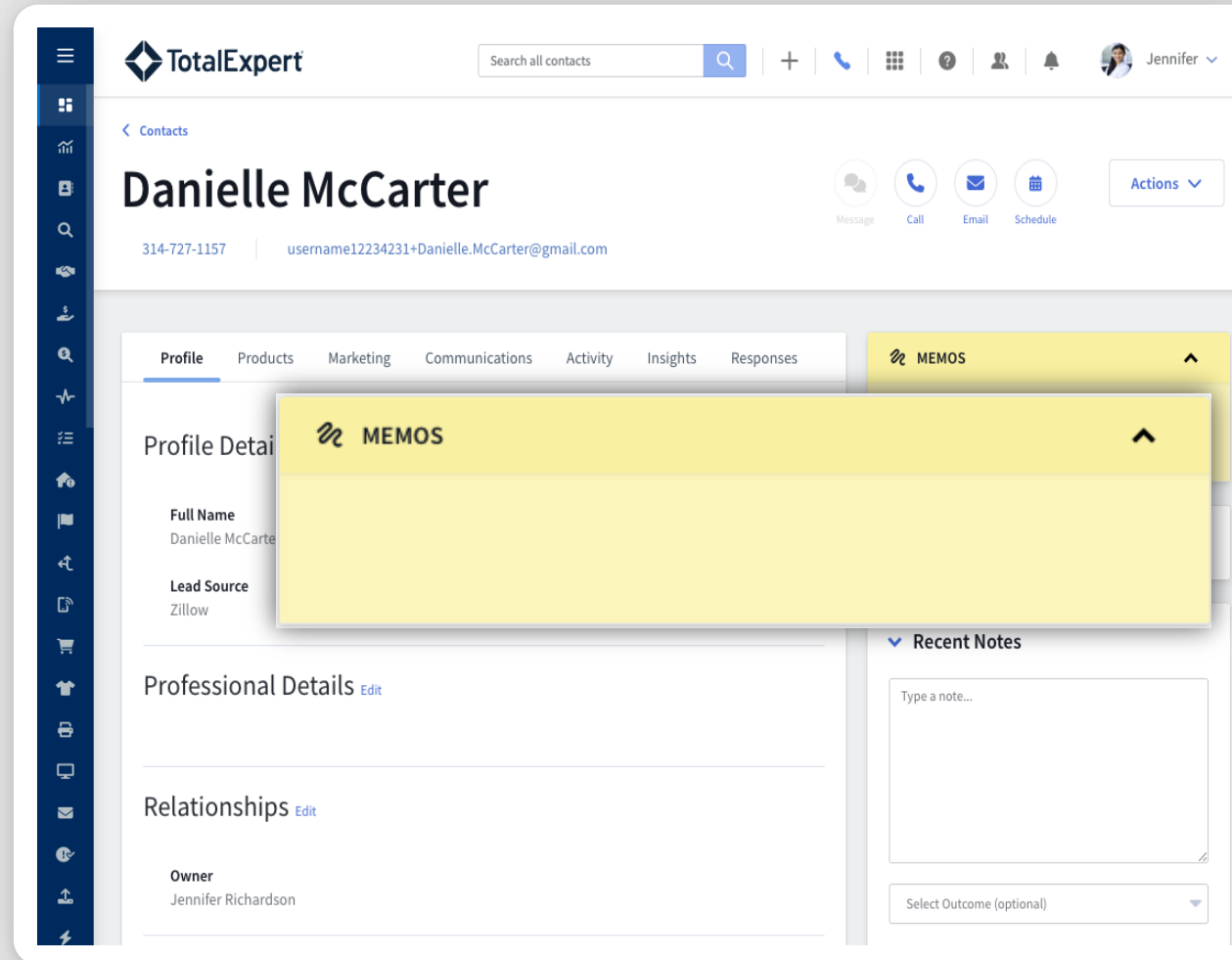
The screenshot displays the 'Loans' page in the TotalExpert application. At the top, there is a search bar labeled 'Search all contacts' and a 'Total: 675' indicator. Below this, a dropdown menu 'Select a list...' is visible next to a 'Save' button. A table of loan records is shown with columns: Actions, Loan Number, Status, Purpose, and Purpose. A context menu is open over the 'Save' button, showing options 'Save' and 'Save as new list'.

	Actions	Loan Number	Status	Loan Type	Purpose
<input type="checkbox"/>	Actions ▼	51300	Application	Conventional	Refinance
<input type="checkbox"/>	Actions ▼	960045	Lead	FHA	Purchase
<input type="checkbox"/>	Actions ▼	172344	Application	ARM	Refinance
<input type="checkbox"/>	Actions ▼	321730	Lead	USDA	Refinance
<input type="checkbox"/>	Actions ▼	56119	Clear to Close	ARM	Purchase
<input type="checkbox"/>	Actions ▼	57841	Funded	ARM	Purchase

IMPROVE SALES PRODUCTIVITY

Contact Memos

Pin important, timely notes or reminders to the contact details page. This common enhancement request saves user time by eliminating the need to reference activity logs for simple reminders.

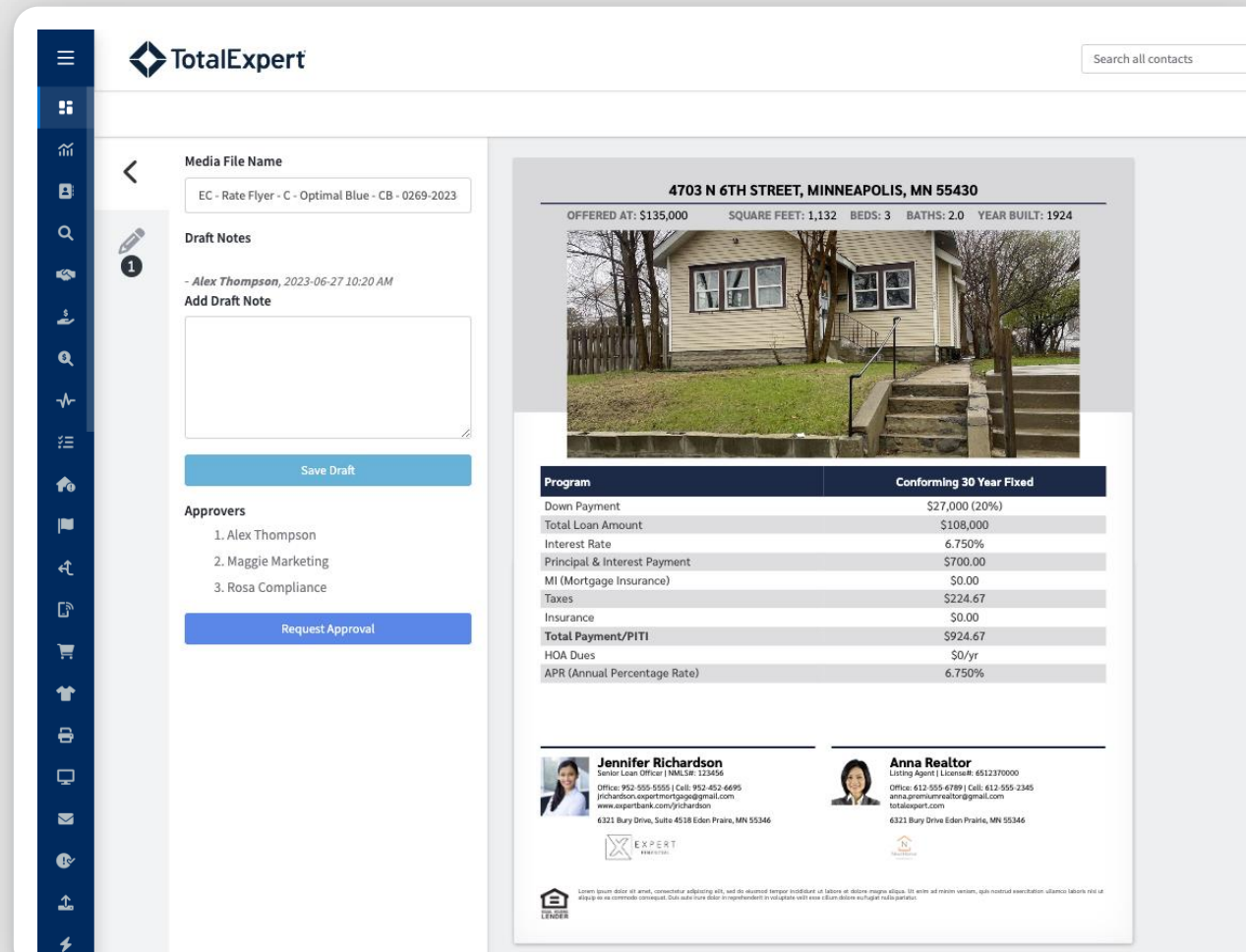


Integrations



Optimal Blue Integration

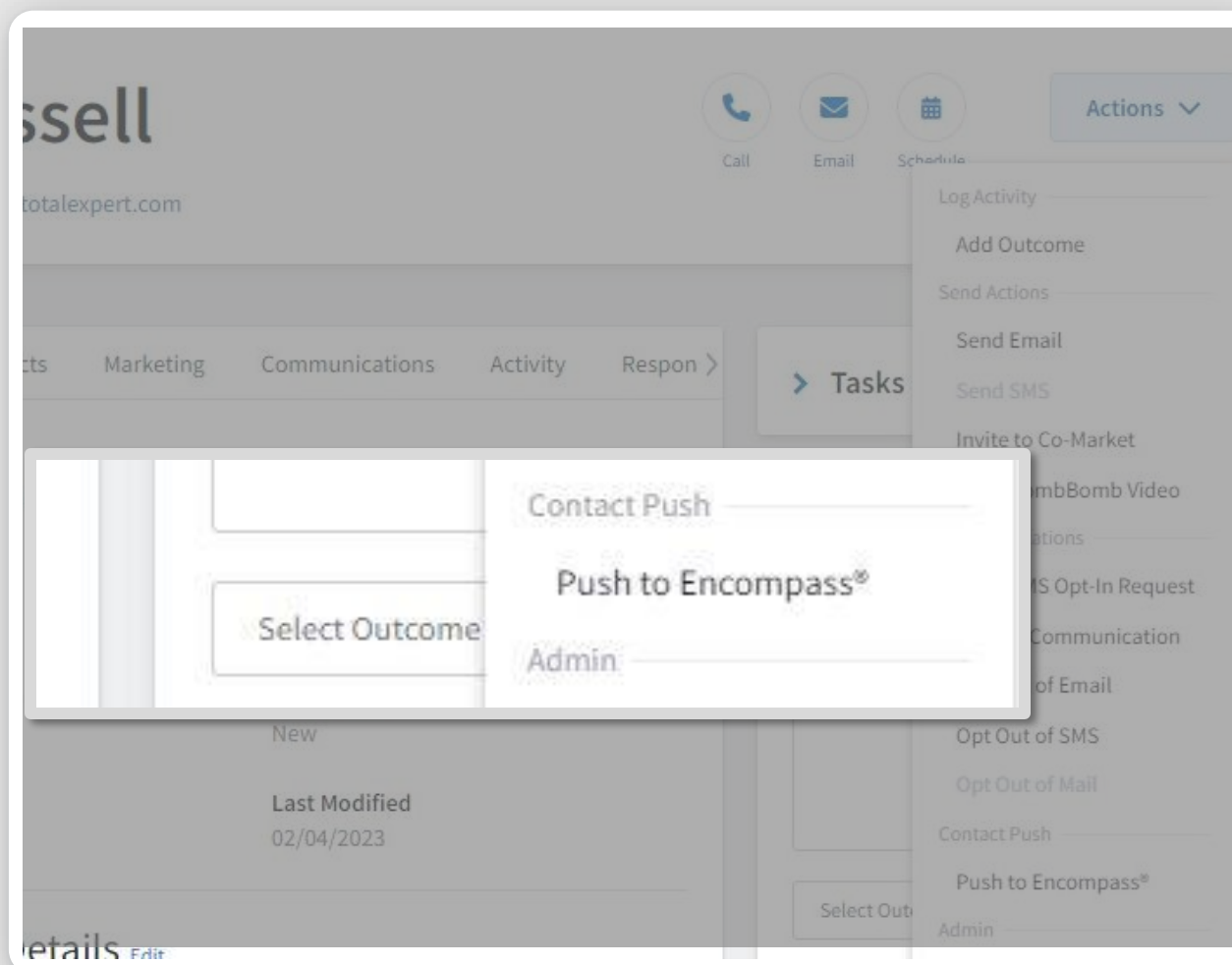
The enhanced Optimal Blue integration provides users with an enhanced user experience, configurability in searching for loan product, and optionality in which loan products can be used in rate flyers.



IMPROVE SALES PRODUCTIVITY

Encompass Integration

Sync contact data and receive real-time updates from Encompass to seamlessly trigger workflows and marketing automation.



ENHANCING THE ECOSYSTEM

Enhanced Integrations for Point-of-Sale Providers

Enhanced integrations with Floify and Simple Nexus enable data to flow more easily between point of sales systems and Total Expert. Providing users with the ability to create prospects and start loan applications more efficiently and the piece of mind that data is captured in both systems.



IMPORT RECRUITING DATA WITH EASE

InGenius Integration

Mutual Total Expert and InGenius users can push any user created list of recruits to Total Expert then enabling users to build out automated journey workflow, tasks, and focused views using the recruits as contacts



Thank you