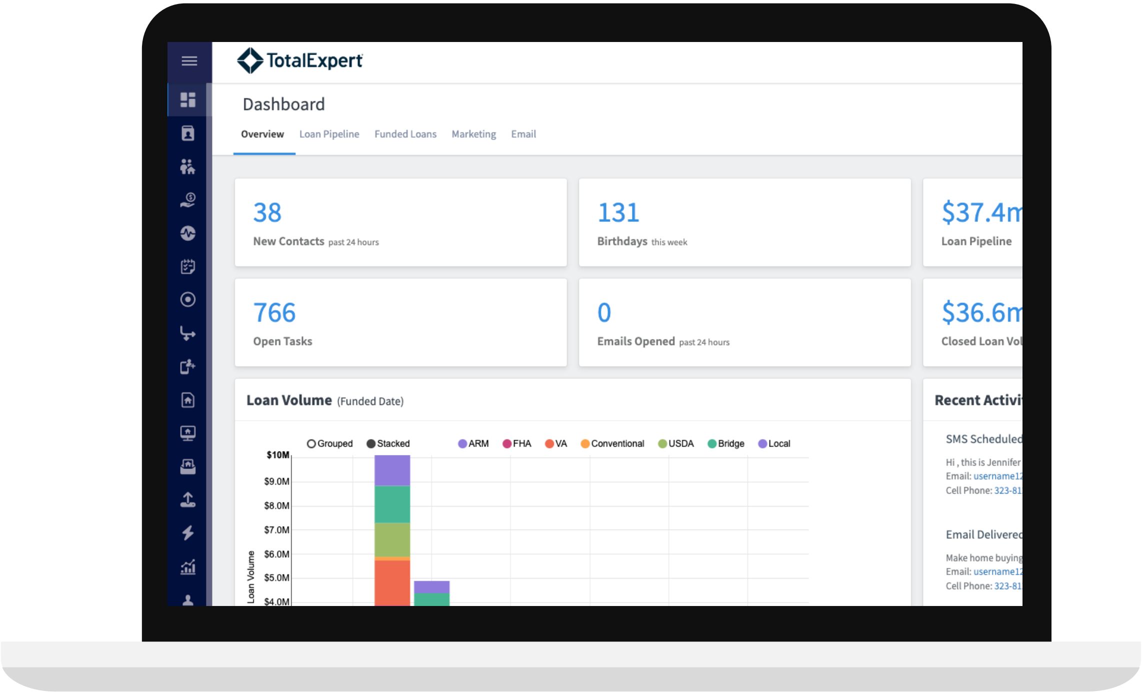
2023 Fall Release

TotalExpert®

Transform your tech stack into a deal flow engine

Deepen your customer relationships with a dynamic, data-rich customer profile.

- Capitalizing on data-driven deal flow.
- Streamlined workflows, heightening productivity.
- A better customer experience with centralized data through connected integrations.

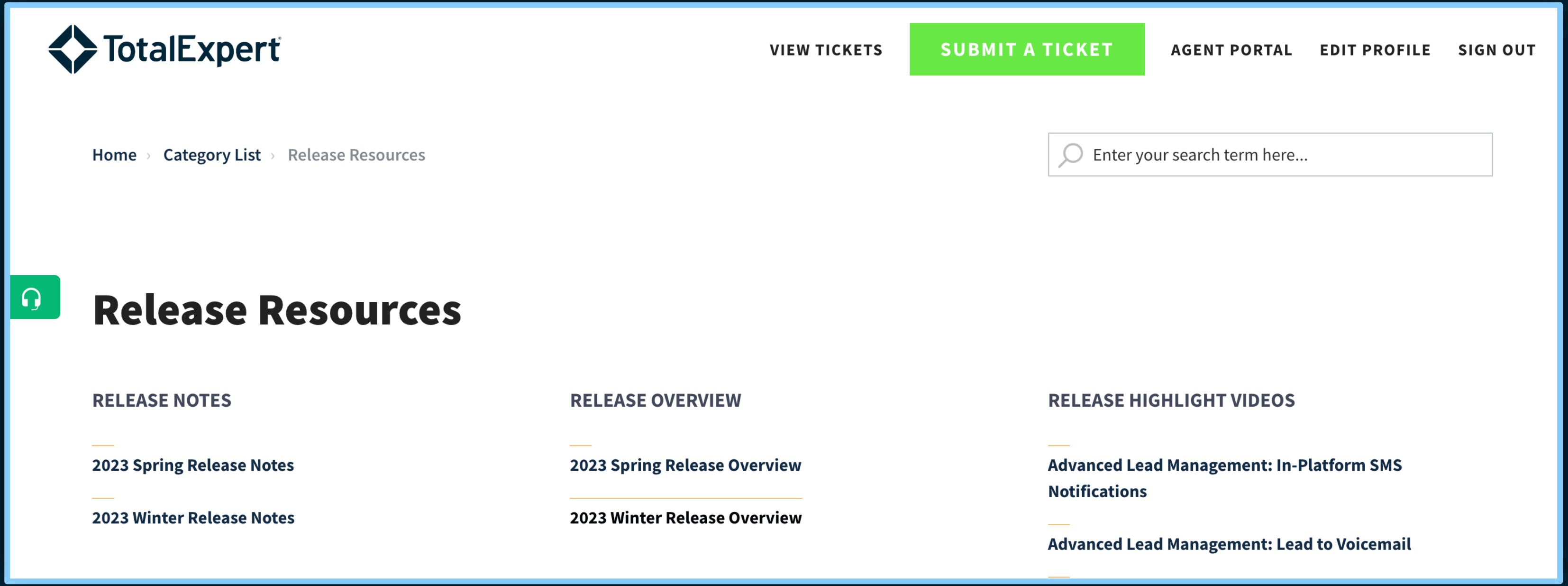


KEY DATES

KNOWLEDGE BASE
RELEASES PAGE UPDATE
November 3rd

GA
RELEASE ANNOUNCEMENT
November 8th

Releases Page within Knowledge Base



One-Stop Shop for customers to access release materials

- ➢ Release Highlight Videos
- ➢ Release Overview Presentation (Business Value Presentation)
- ➢ Release Notes

Overview- ‘23 Fall Release

Feature/ Integration	Description	Cost and Dependency
ALM: Contacted Date Optionality	Configure the lead distribution rule to determine how long a new assigned lead stays with a specific user	Requires ALM functionality – no additional cost for existing ALM customers
ALM: Custom Fields on a Lead	Lead entities are now able to have custom fields on their records like contact records	Requires ALM functionality – no additional cost for existing ALM customers
Customer Intelligence - Credit Improvement	Lenders can monitor contacts with a poor credit score and receive alerts when they achieve a minimum credit score threshold	Subscription Required, Implementation TBD
Dashboard Analytics – CI Attribution	Aggregates CI usage data and helps Admins attribute loan production and revenue to CI performance	None
Optimal Blue Enhanced Integration	A new user experience allows users to see and edit search criteria and choose all relevant loan products for inclusion in marketing flyers.	Optimal Blue account required - $2.50/user/mo
TrustStar Integration	TrustStar provides LOs with an interactive and personalized way to capture information about real estate agents and agencies, empowering them to create necessary partnerships to fuel their pipelines.	3rd Party License Required, no Implementation
Encompass Multi-Connection Support	Users can push Total Expert contacts to Encompass and map their Encompass data to Total Expert and save with the click of a button.	Existing Encompass Customers- $3,000 migration consulting fee*
TE for Salesforce	Iterative improvements from customer feedback including the ability to map several objects to TE’s contact/leads entity, create ability for contacts originating in TE to be shared with Salesforce.	Requires Salesforce Managed App Implementation - $30/user/month, Services TBD on Scoping
Platform Optimizations ‘Quick Wins’	With every release, we listen to your feedback and invest in making your daily tasks smoother, faster, and more productive. For a full list of improvements – see next slide.	None

$ **Add-on Pricing**

Fall Release – Platform Improvements

Feature	Cost and Dependency
Sales Productivity and Marketing Automation: • Journey Stats • Agent YouTube Training Videos for Agent Accounts on Quick Links menu • Memos Field added to Contact List and enable export abilities • Add Contact IDs to the Contact List • Add visibility of the ok to call field on the contact details • Support Video Across Social Networks • Filtering Users by Status • Add Filtering to Add User to Teams modal • Remove inactive users from spoofing user list **Customer Intelligence:** • Add Equity Enrichment Data to Content Management Templating • Add Equity Enrichment Data to Journey Conditions • Add state, city, zip, address 'empty' checks to inquiry estimated counts	**None**

Continuous Innovation

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*:

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
  - Lead API Endpoint GET & PATCH
  - 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

Fall 2023*

- Credit Improvement for CI
- Advanced Lead Management
  - Contacted Date Optionality
  - Custom Field on a Lead
- Analytics Reporting and Dashboards
  - CI Attribution
- Platform Improvements
  - Memos Field on Contact Lists
  - Contact IDs on Contact Lists
  - And more…
- Optimal Blue Enhanced Integration
- TE for Salesforce
- Encompass Enhanced Integration
- TrustStar Integration

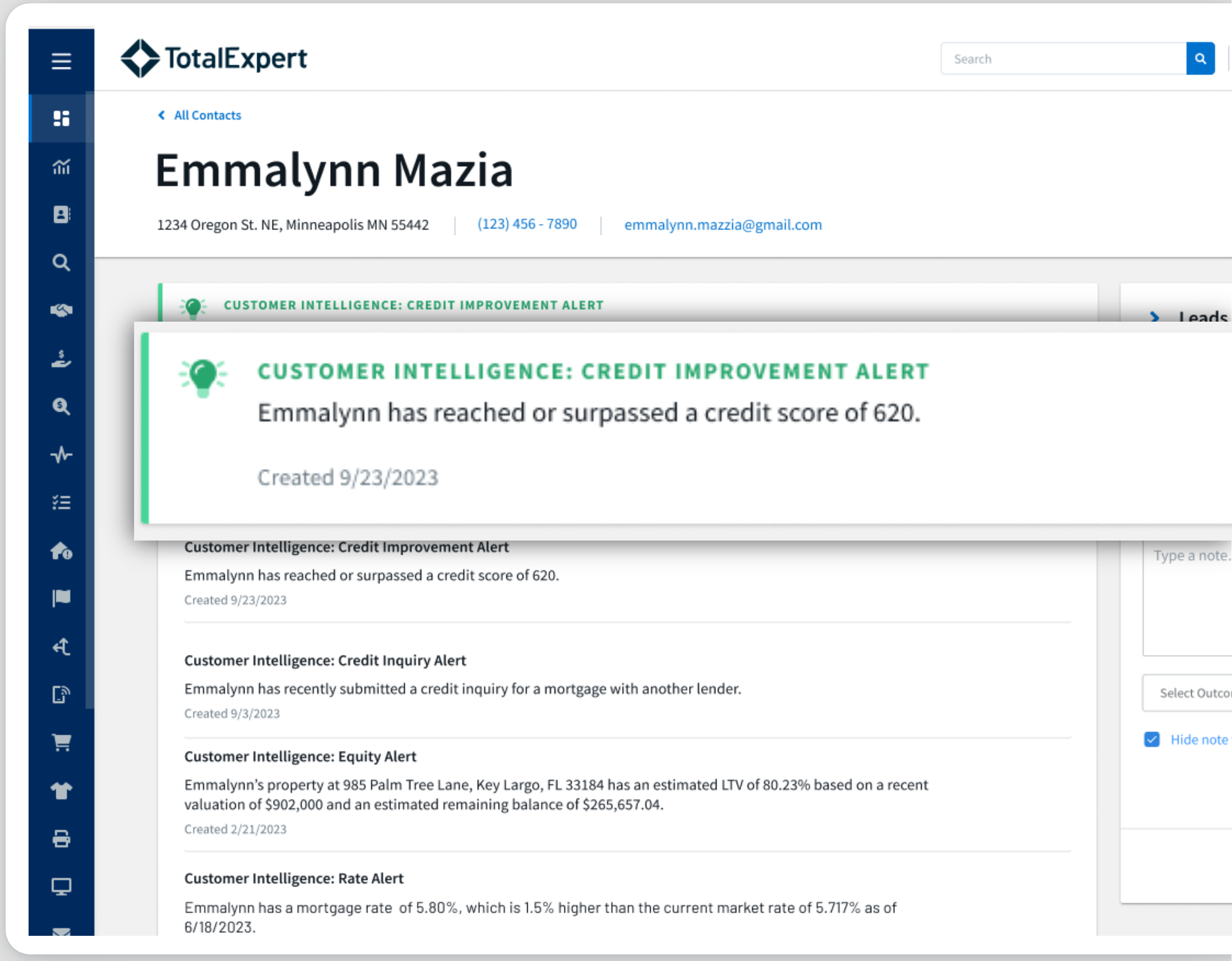
* Not inclusive of all platform enhancements. Future enhancements are subject to change

Featured Solutions

GENERATE MORE OPPORTUNITIES

Customer Intelligence: Credit Improvement

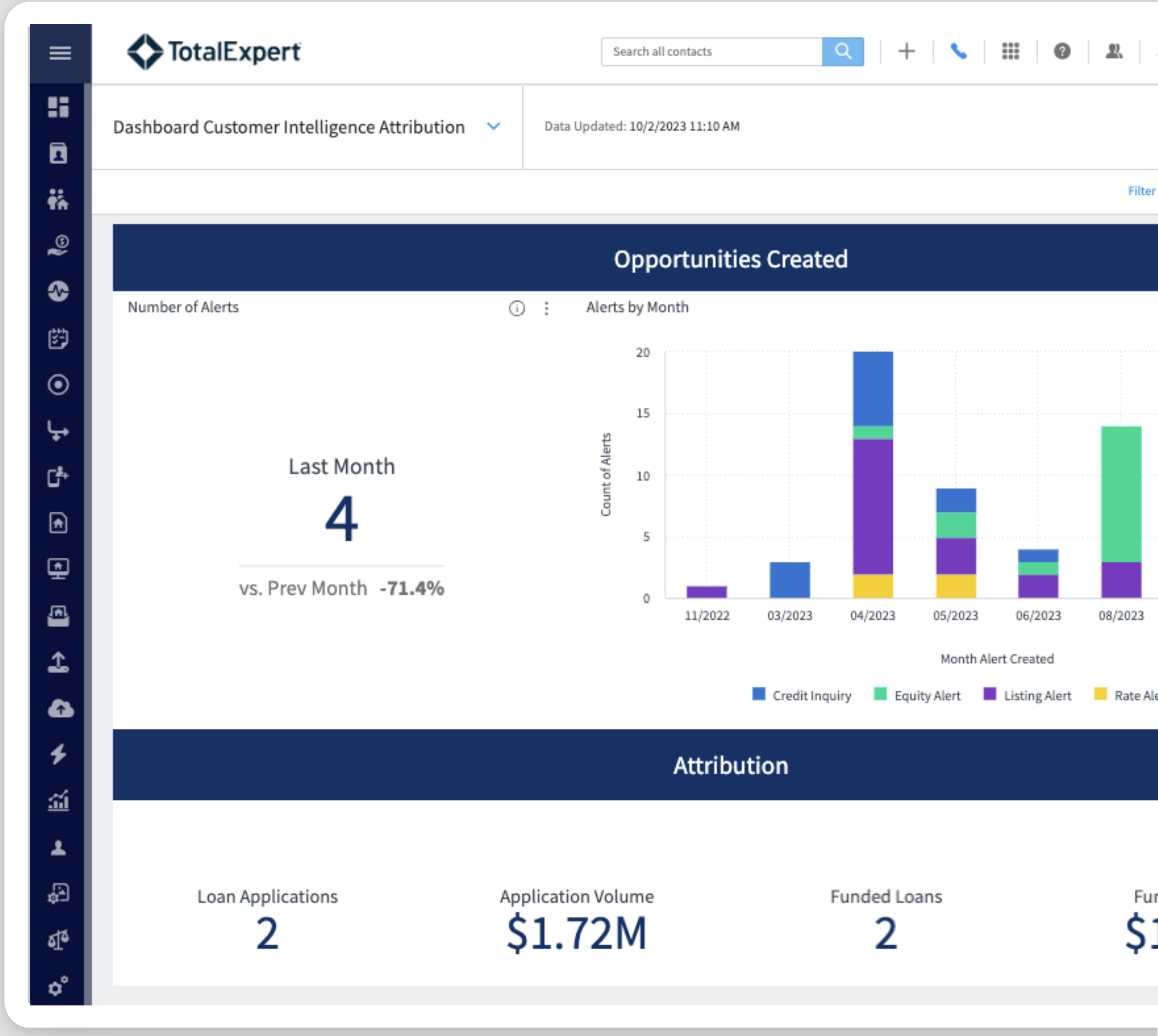
Make data-driven decisions with insights on your contacts credit worthiness. Uncover more opportunities by sorting, filtering, and grouping contacts based on credit score and leverage Journey automation for credit improvement.



DATA-DRIVEN MARKETING AND SALES

Reporting & Analytics: CI Attribution

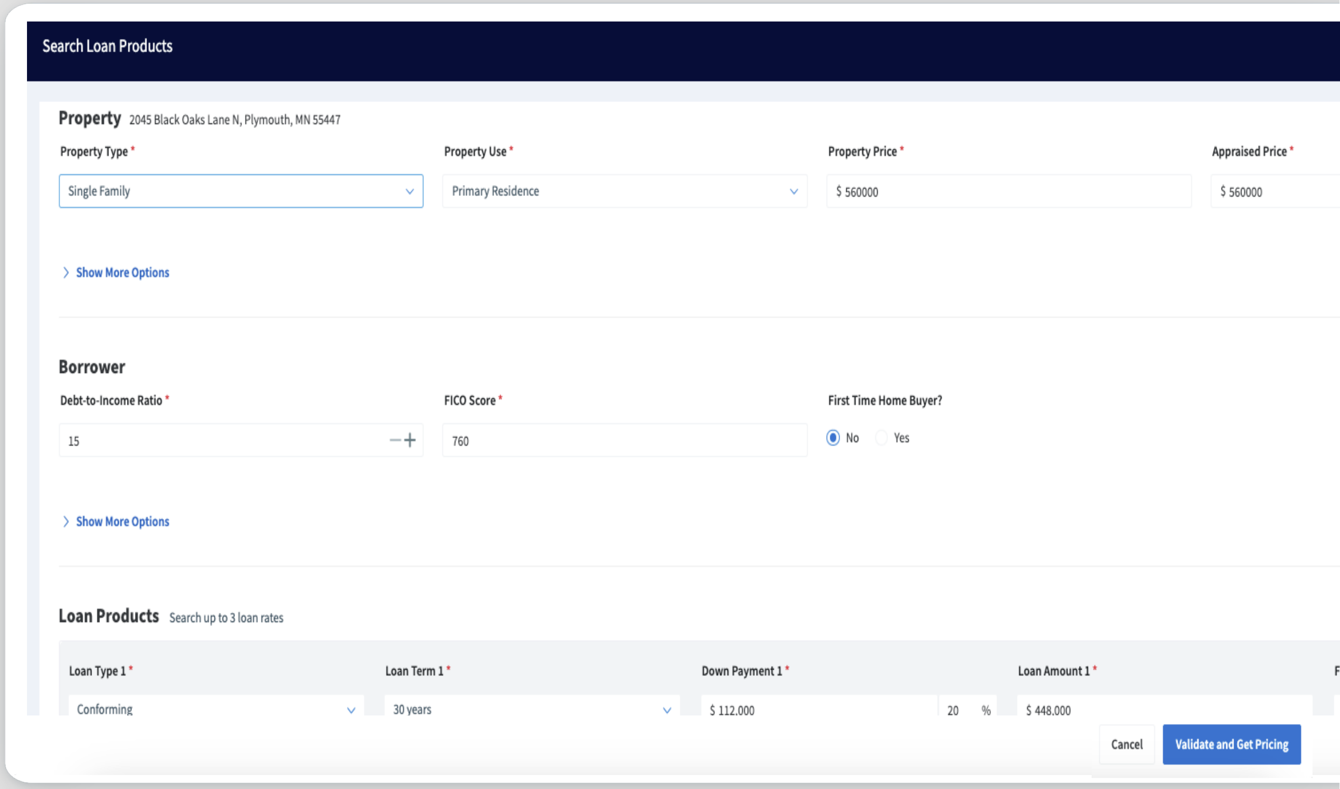
In addition to detailed, organization-specific dashboards to help you measure campaign performance and production, Customer Intelligence (CI) users can now visualize and optimize based on CI usage and attribution performance .



Enhanced Integration

Optimal Blue

The enhanced Optimal Blue integration provides users with an enhanced user experience, optionality in searching for loan products, and which loan products to use in rate flyers.

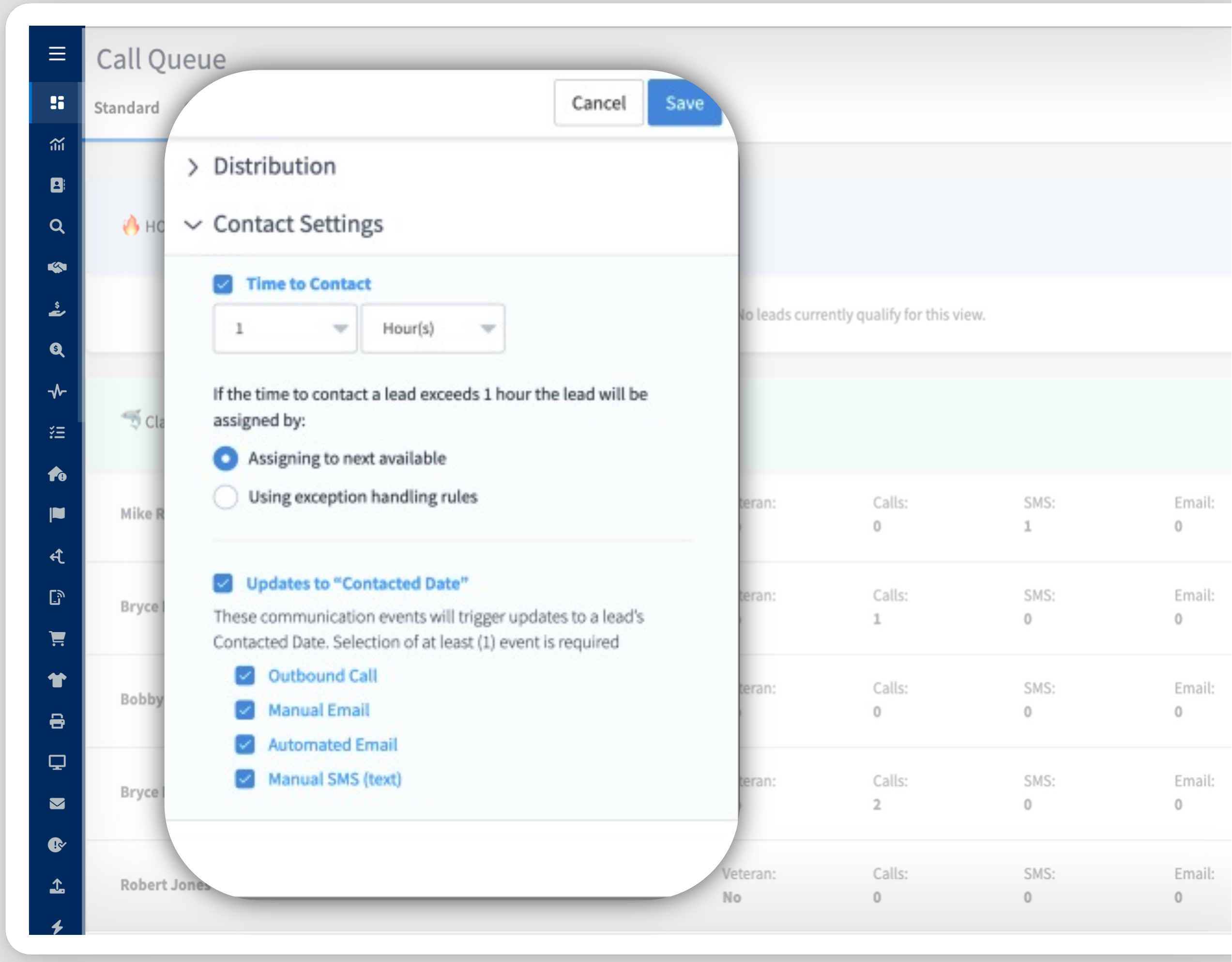


*Limited to Controlled Availability

LEAD QUALITY, VOLUME & ROUTING

Advanced Lead Management

Advanced Lead Management (ALM) enables you to surface the right opportunities, at the right time, to the right LO. ALM now boasts custom fields on lead records and the option for users to dictate which actions keep contacts assigned to each user.

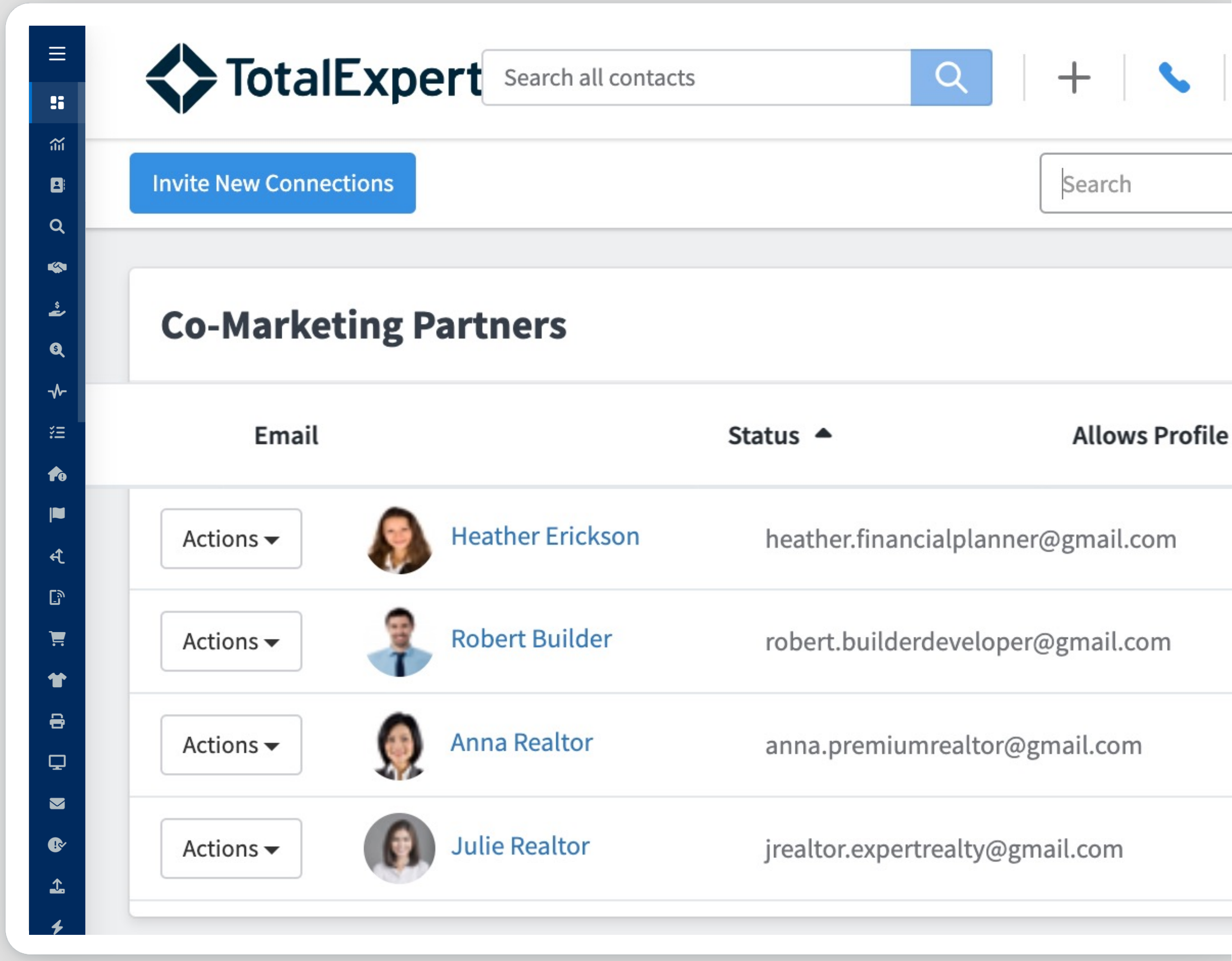


Platform Optimizations

PLATFORM SUCCESS

Platform Optimizations

With every release, we listen to your feedback and invest in making your daily tasks smoother, faster, and more productive. For Fall 2023, we have delivered enhancements to key capabilities across the platform from customer intelligence to sales productivity tools and marketing automation.

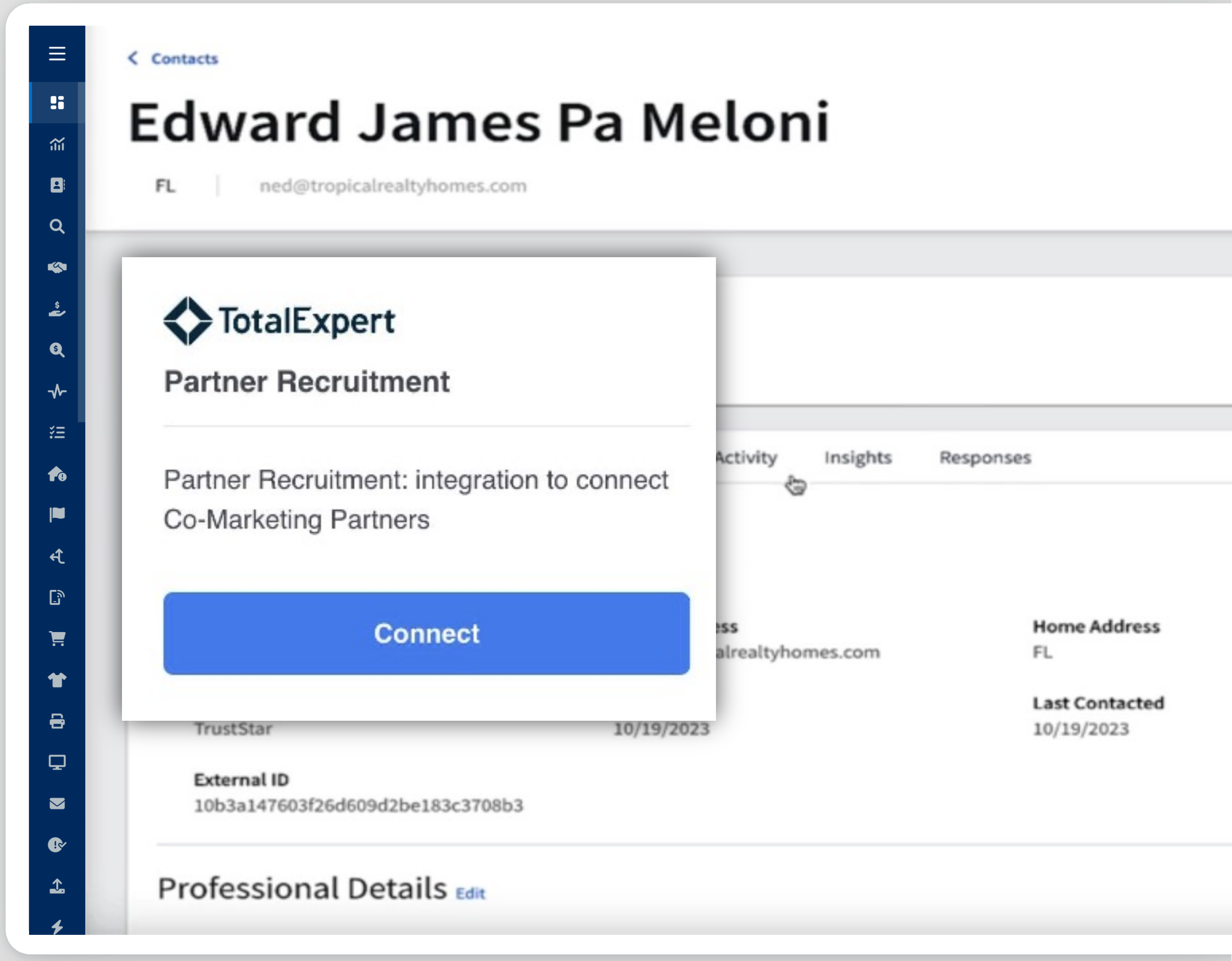


Integrations

INTEGRATION

TrustStar

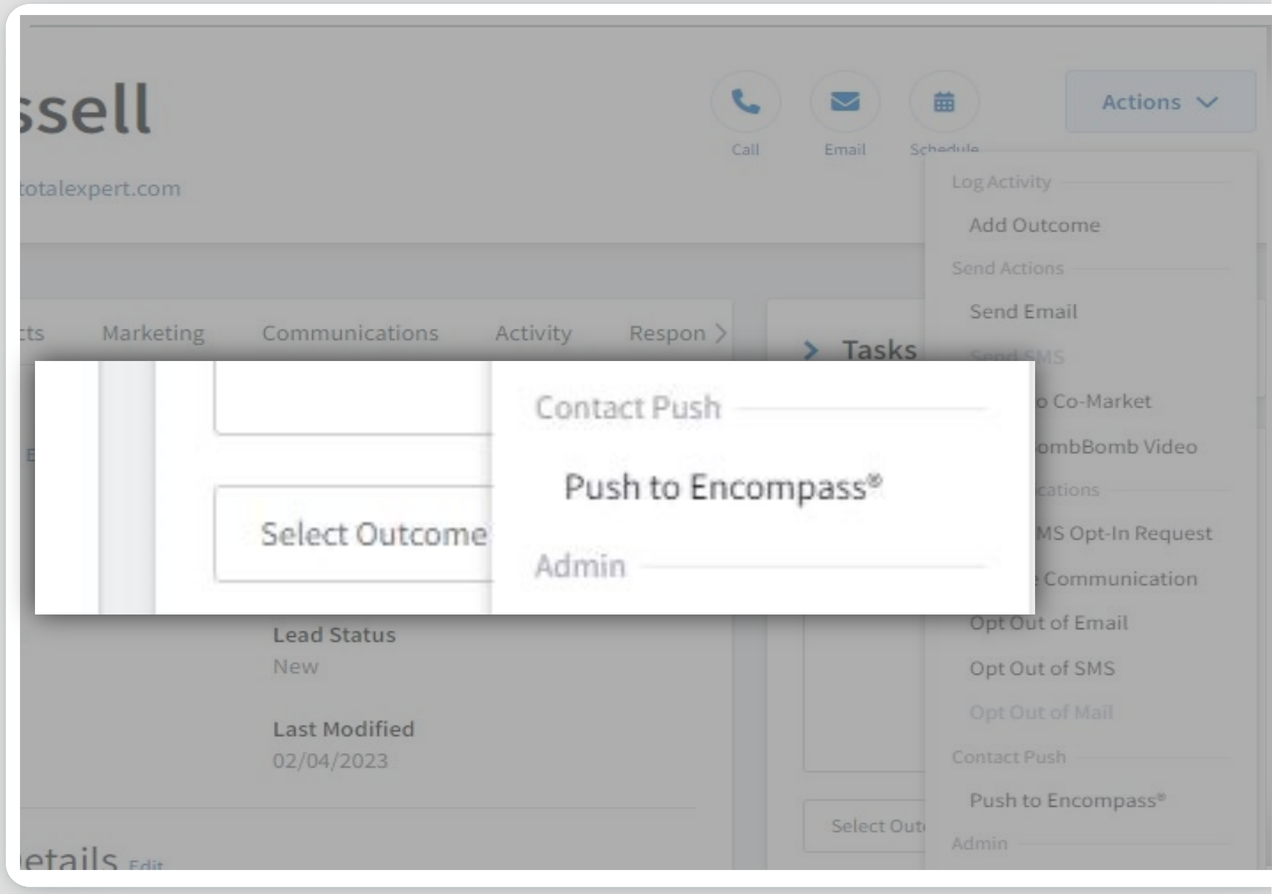
Connect the power of TrustStar's realtor referral partner performance data with Total Expert's ability to build, manage and run automation with key co-marketing relationships.



INTEGRATION -
IMPROVE SALES PRODUCTIVITY

Encompass

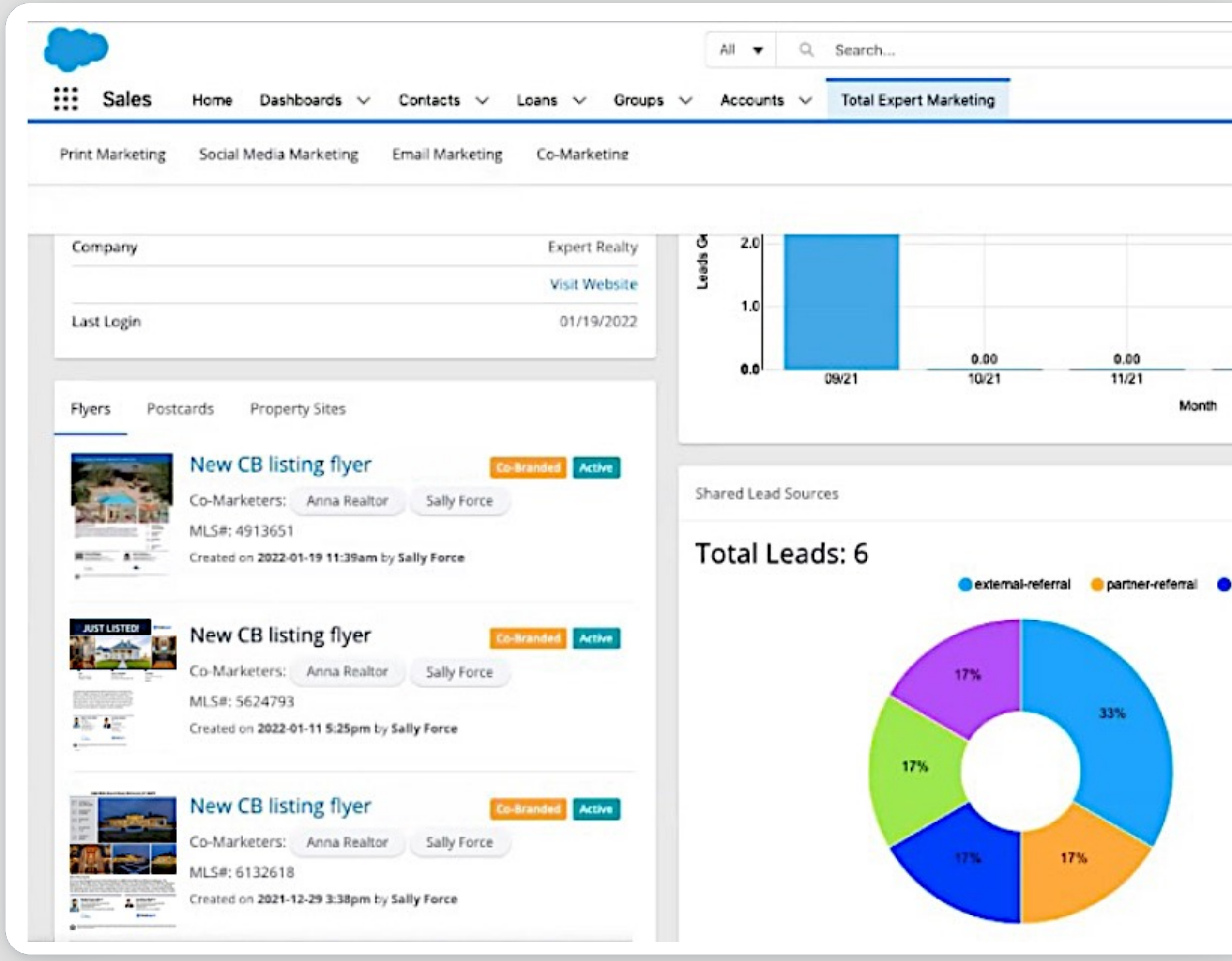
Sync contact data and receive real-time updates from Encompass to seamlessly trigger workflows and marketing automation.



INTEGRATION

Total Expert for Salesforce

Add the power of Total Expert's purpose-built sales and marketing toolbox to Salesforce to unlock unmatched value for your institution.



Thank you