



Campaigns – In Process

In-process journeys in Total Expert are an important part of informing borrowers, co-borrowers, and 3rd parties of each step in the loan process. Using one of these journeys reduces unnecessary outreach, while still keeping all parties informed and automating communications at appropriate times.

Available Expert Content In-Process Journey Options

- In Process Purchase Milestone

How Do You Get These Journeys Ready?

- Define your organization’s loan statuses.
 - Ensure that the statuses referenced in the green triggers correspond to the ones used by your LOS. You can modify the status used by editing the trigger’s event parameters.
- Define the loan purpose as Purchase.
 - Ensure that an inline condition in the green trigger identifies the correct loan purpose.
- Define adverse paths (the “off ramps”).
 - Some of the green triggers will remove contacts from the journey when they should no longer receive loan status updates. Standard statuses used for this purpose are Adverse, Withdrawn, Cancelled, and Denied. Ensure the statuses are correctly defined. You can modify the status used by editing the trigger’s event parameters.
- Review email, video, SMS, and user notifications.
 - Preview the email templates included in each journey. You can play a video by clicking the video thumbnail.
 - User notifications are created as snippets to be included in emails. To view user notification snippets, navigate to **Manage Marketing → Template Snippets**.
 - SMS messages are also created as snippets. To view the SMS snippets, navigate to **Manage Marketing → Template Snippets**.

**Marketing Automation customers can consult their project teams on the use of user notifications

- Update journey statuses to reflect what you would like to see in reporting.
 - The default journey status names follow the formula `name of the Journey + loan status`.
 - Journey statuses are used to see how many contacts have made it through each phase of the journey.
- Review timer delays.
 - Timer delays are used to ensure that contacts receive the Do’s and Don’ts email, Closing Disclosures, Referral Request, and various loan status alerts at relevant times. This timeline follows Total Expert best practices, but you should confirm that the cadence reflects your organization’s preferences.