



Campaigns – Post Close – Home Anniversary

The purpose of a post close purchase journey in Total Expert is to follow up after a successfully funded loan. This is important to keep in touch with your borrowers, co-borrowers, and 3rd parties at each step in the loan process. The journey automates ongoing follow-up communication at appropriate times, such as asking for a review, reminding about refinance opportunities, and sending loan anniversary messages.

Available Expert Content Post Close Journey Options

- Post Close – Home Anniversary – Purchase – V.3.0

How Do You Get These Journeys Ready?

- Define your organization’s equivalent loan status for Funded.
 - Ensure that the appropriate status is used in the green On Loan Status trigger. This would typically be either Funded or Closed.
 - If your LOS places contacts into a Past Clients group, you can have the journey use this by adding an inline condition to the trigger.
- Define adverse paths (the “off ramps”).
 - The most common reason to remove someone from these journeys is because the user unsubscribed. Feel free to add more off ramps as you see fit.
- Review the content of each email template and user notification to ensure that the messages you send out align with your organization’s messaging.
 - Preview the email templates included in each journey.
 - User notifications are created as snippets to be included in emails. To view user notification 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.
- Consider a review email with a link to both the borrower and co-borrower.
 - If this is not wanted or needed, feel free to remove it.
- Consider messaging to the buyer's agent and seller’s agent to continue the relationship.
 - If these are not wanted or needed, feel free to remove them.