



# Mobile App Engagement Journey

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## Journey Overview

The Mobile App Engagement Journey is designed to onboard, educate, and empower loan officers to fully adopt and leverage the Total Expert mobile app through a series of timely, bite-sized text messages.

The Mobile App Engagement Journey consists of 7 core messages, strategically spaced to encourage adoption of the Total Expert mobile app.

## How to Deploy the Journey

- Upload your end users as contacts using the data importer and add them to a specific group. Use that group as an on-ramp to the journey. End users will be considered “contacts” in the Marketing Admin account.
  - You can opt your LOs in by default, so no opt-in text is required. When you import your LOs, include the following mapped fields:
    - `sms.opt_status = OPTED_IN`
    - `SMS Target = Contact Phone Cell Number`
- Review all the text message snippets (see below) and make sure they make sense for your organization. Omit or replace messages that do not apply.
- Change the timer delays to fit your desired time frame and cadence.

## Journeys SMS Messages

### App Download

**Snippet name:** App Download



### Snippet text:

 Get started with the new Total Expert Mobile App!

Download it here:

iOS: <https://apps.apple.com/app/total-expert-inc>

Android: <https://play.google.com/store/apps/details?id=com.totalexpert.mobile>

## Enable Face ID & Push Notifications

**Snippet name:** Enable Face ID & Push Notifications

### Snippet text:

 Want faster logins & real-time alerts?

Enable Face ID: Log in to the Mobile App with your Total Expert email and password, then turn on Face ID for quick, secure access.

Enable Push Notifications: Tap the gear icon (top right) in the app and toggle on Push Notifications to stay updated in real time.

## Create a New Contact

**Snippet name:** Create a New Contact

### Snippet text:

 Add a Contact on the Go

Meet someone new? Quickly add them to your Total Expert account right from the app:


Open the app > Add Contact > enter their info > Create.

It's fast, easy, and built for your busy day.

## Create a New Message

**Snippet name:** Create a New Message

### Snippet text:

 Send a Text from the Mobile App

Need to reach out quickly? Send a message right from the Total Expert Mobile App:

Open the app > tap New Message > search for your contact > type your message > tap Send (paper airplane icon).

Quick, simple, and perfect for staying connected on the go.

## Add Notes & Outcomes

**Snippet name:** Add Notes & Outcomes

### Snippet text:

 Track Key Details on the Go

Just finished a convo with a lead or customer? Quickly log key notes and details while it's fresh.

Open the app > tap Contacts > search for the contact > tap + add notes > tap the pencil icon (top right) > enter key details and outcomes > Save.

Capture key details—anytime, anywhere.

## Mobile App Training Course

**Snippet name:** Mobile App Training Course

### Snippet text:

 Ready to master the Total Expert mobile app?

Take the quick training here:


<https://totalexpert.freshdesk.com/support/solutions/articles/22000287568-total-expert-mobile-app-and-engage-sms>



## Turn on Auto Updates

**Snippet name:** Turn on Auto-Updates for Total Expert App

**Snippet text:**

 Stay up-to-date on the newest features, hassle-free!

Turn on auto-updates for your Total Expert App:

iOS: Settings > App Store > App Updates

Android: Play Store > Profile > Settings > Auto-update apps