

April Product Update

April 2026



Loan Officer Productivity

Lead Management

- **Property Zip Code routing filter:** Restrict lead assignment by zip code – up to 100 per filter, including prefixes.
- **Lead Source as a Journey condition:** Enable more targeted automation based on where a lead originated.
- **Activity tab filtering by lead context:** Filter to show lead-only activity, a specific lead, or stage changes.
- **Lead Volume routing filter:** Set a maximum active lead threshold per user per policy to manage capacity.
- **Outcome-based Lead Stage updates:** Map outcomes to lead stages so logging an outcome automatically advances the lead.
- **Flyout panel enhancements:** Recent activity and action buttons now available directly in the flyout panel header.
- **Clickable Lead Stage chart:** Click any stage bar to instantly filter Pipeline View to leads in that stage.
- **Evocalize Lead integration:** Contacts from Evocalize digital ad campaigns can now flow into Total Expert as Leads. (End of April)

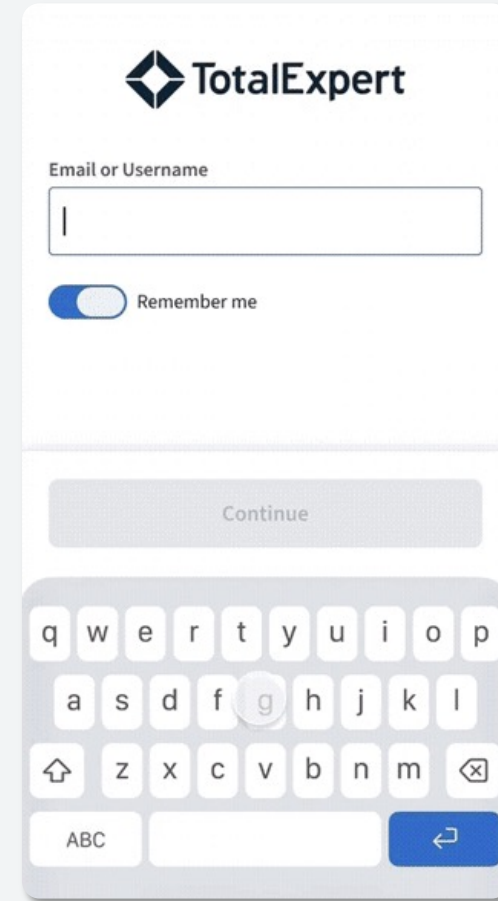
The screenshot displays the 'Contacts' page in TotalExpert. At the top, there's a search bar and user profile 'SaraAdmin'. Below the search bar are buttons for 'Edit Outcomes', 'Export CSV', and '+ Create Contact'. The main content area is divided into three sections: 'TOTAL LEADS' showing 70 leads worth \$37.1M; 'ACTIVE PIPELINE BY STAGE' with a bar chart showing counts and values for New Lead (12, \$6.3M), Contact Attempted (11, \$6.3M), Engaged (6, \$4.1M), App Started (10, \$4.8M), App Submitted (9, \$4.1M), Pre-Approved (11, \$5.5M), and In Process (11, \$6.2M); and 'CLOSED' showing 5 leads worth \$3.4M. Below these is a filter bar with 'Lead Management default c...' and a 'Save' button. A table below shows 0 of 46 selected leads with columns for Name, Lead Stage, Lead Referred By, Lead Source, Loan Purpose, Credit Rating, Lead Updated Date, and Lead Value.

Name	Lead Stage	Lead Referred By	Lead Source	Loan Purpose	Credit Rating	Lead Updated Date	Lead Value
Darwin O'Gormley Darwin@example.com (225) 212-5861	Closed	Darwin O'Gormley	Friends & Family	HELOC	Poor	3/31/2026 12:01 PM	3/
Cristobal Atkinson Cristobal@example.com (515) 748-6539	Closed	Cristobal Atkinson	Friends & Family	Other	Poor	3/31/2026 12:01 PM	3/
Brittani Schoenfisch Brittani@example.com	Pre-Approved	Brittani Schoenfisch	Friends & Family	TBD	Good	3/31/2026 12:01 PM	3/

Mobile App

Mobile Login Enhancements

- **Biometric support for SSO users:** Face ID and Touch ID now available for SSO-enabled organizations.
- **Remember Me stores email only:** Balances convenience with security – no credentials stored.
- **Session timeout via org setting:** Admins configure session duration at the organization level.

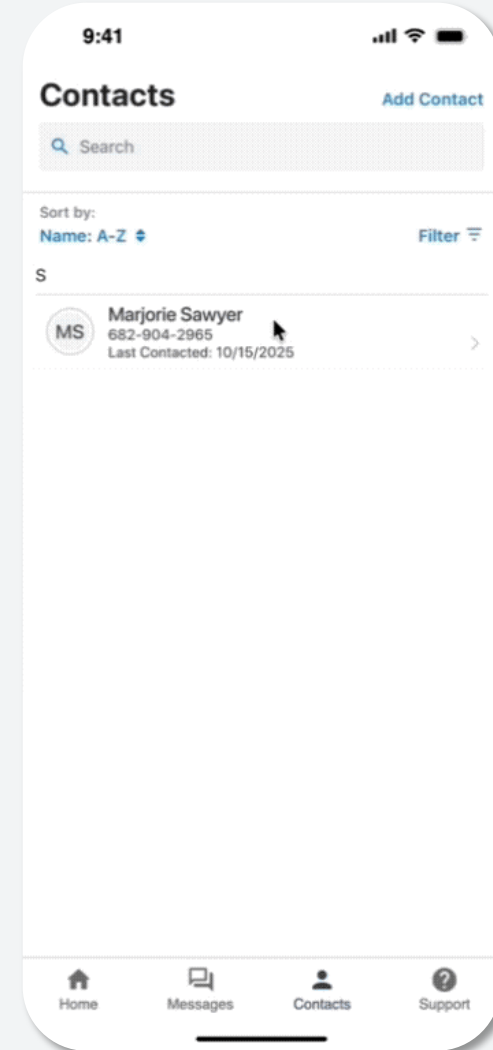


Mobile App

Contact-Level Task Management in Mobile

Loan officers can create, view, and act on tasks directly in the Contact record from the Total Expert mobile app, without switching to a desktop.

- **Create and manage tasks on mobile:** Create, view, complete, and manage tasks in-app.
- **Connected to existing workflows:** Mobile tasks sync with the web experience across devices.



AI & Automation

AI Sales Assistant Enhancements

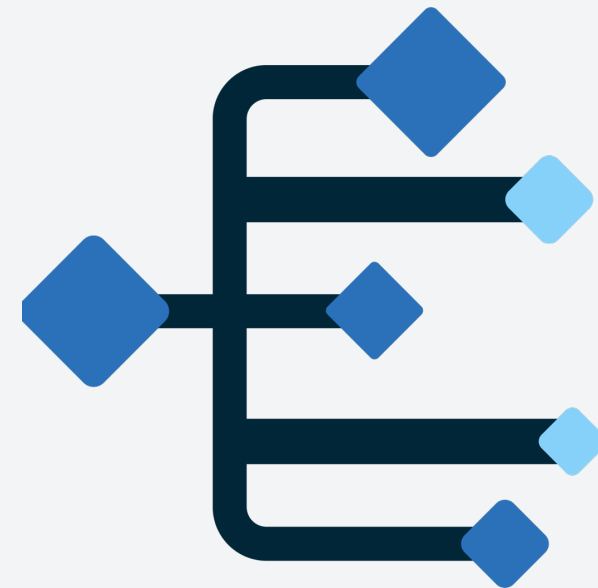
- **User-level AI configuration:** Define unique settings per loan officer without separate connector instances.
- **Conditional ODC payload logic:** Send the right data based on the context of each interaction.
- **Improved LO name handling:** Borrowers now get clearer team vs. individual loan officer names.
- **Updated MS Bookings integration:** Improved performance and appointment consistency at scale.
- **Consumer opt-out feedback:** Consumer opt-outs and outcome signals (do not contact, not interested, angry or upset) now automatically update Total Expert's consent record.



Campaigns

Journey & Campaign Updates

- **Standardized Journey Categories:** Assign a category from a predefined list (Lead Generation, Nurture, Conversion, Retention, CI, Life Events, AI Sales Assistant, Post-Close, and more) to filter and organize the Journey library.
- **Active Contacts count in Journey Stats:** Journey Stats now shows Active Contacts alongside Total Contacts, with at-a-glance visibility into how many contacts are currently on each Journey, without manual totaling.
- **Co-Marketing Partner journey conditions:** Use Co-Marketing Partner acceptance status as a Journey condition and trigger Journeys when a partner accepts an invite.

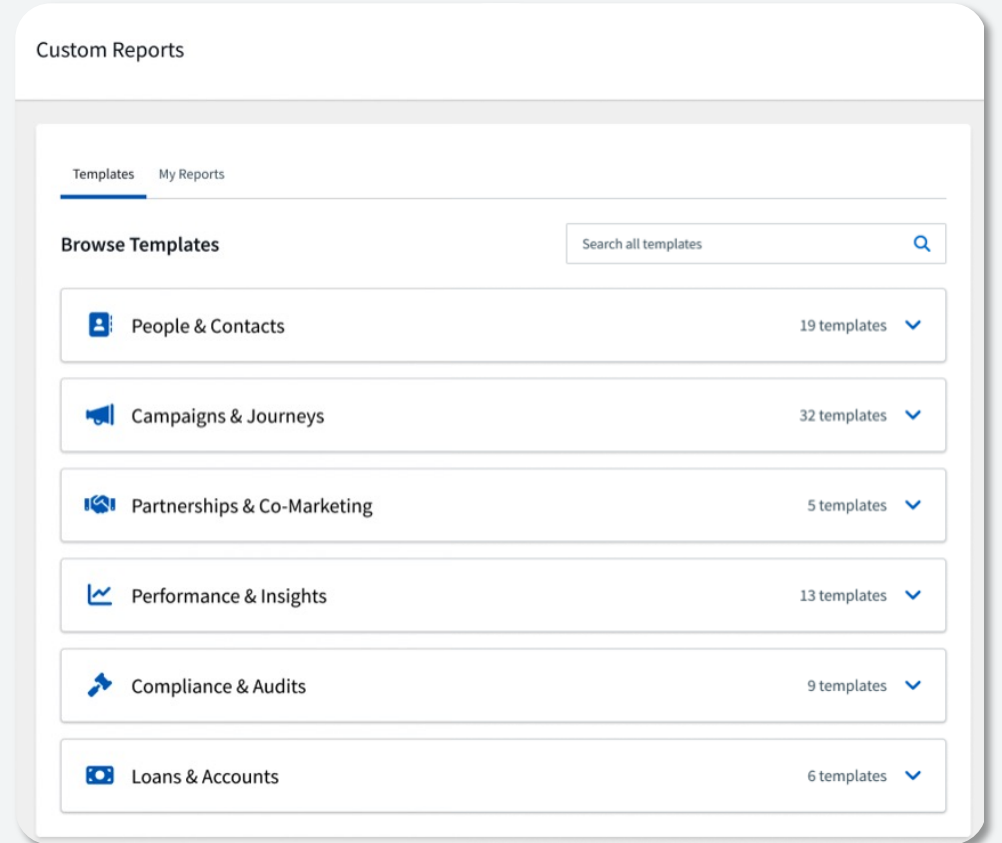


Platform & Campaigns

Small Changes. Big Impact.

Smaller, high-impact improvements driven by customer and internal feedback.

- **Reporting Center – custom fields clarity:** Clear UI messaging now informs admins that custom fields are not included in reports.
- **Content – Image Library dropdown fix:** The Global Image Library actions dropdown now correctly closes when clicking outside.



Integrations

Consent Aggregation: Partner Integrations

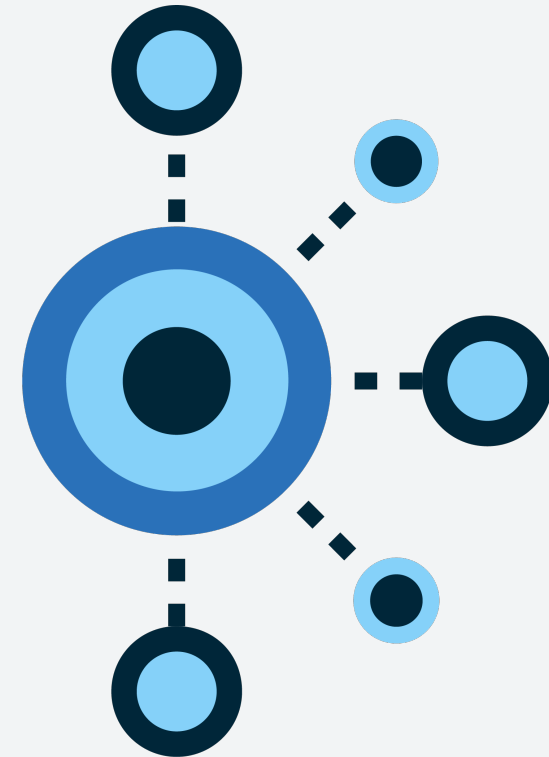
- **RETR Home Value Report:** RETR's consumer portal can now capture consumer consent and share it directly with Total Expert for compliant post-close engagement.
- **nCino Point of Sale:** Building on existing SMS opt-in sync, nCino is adding AI Voice consent capture during the application process.
- **Evocalize:** Digital ad campaigns can now share SMS opt-in and AI Voice consent to Total Expert for contacts originating from those campaigns.



Integrations

Outbound Data Connector (ODC)

- **ODC log visibility:** A full audit trail – which ODC was triggered, what was sent, and the outcome.
- **View ODC setup without disabling:** Review configuration without risking disruption to active workflows.
- **Bulk trigger from multi-select:** Initiate contact and loan ODCs directly from the multi-select action menu.
- **Loan ODC activity on primary contact:** ODC activity from a Journey is now visible in the primary borrower's contact feed.



Integrations

Blend Integration Enhancements

- **SMS opt-in sync from Blend:** Borrower opt-ins during Blend applications now automatically sync to Total Expert.
- **Middle credit score from Blend:** Credit score captured in Blend is reflected in the Total Expert contact record.
- **Enhanced pre-fill from Total Expert:** Mobile number, property type, search timeline, and first-time homebuyer status.



Integrations

Total Expert for Salesforce 6.5

- **Email activity previews:** View emails sent from TE directly within Salesforce activity records – no TE login required.
- **AI Sales Assistant call recordings:** .wav recordings from AI Sales Assistant calls now displayable in Salesforce engagement activities.
- **HTML editing & Direct Send expansion:** Edit TE HTML email templates in Salesforce with BombBomb support. Direct Send now on Contact, Opportunity, and Task.
- **Updated Contact Related User Mapping:** Now optional for TE-to-SF flows, with Owner field mapping by ID, email, username, or external ID.
- **Domain-level email unsubscribes:** Unsubscribes from SF now include the LO's email domain for enterprise-level unsubscribe compliance.



Expert Content

New Expert Content Releases

Ready-to-deploy assets that keep teams in front of consumers at the right moments.

- **Seller's Education Marketing Package:** Email series for potential home sellers covering ROI upgrades, open house prep, and more.
- **Monthly Marketing Digest Template:** Reusable template to highlight new content, campaigns, and promotions each month.
- **Covered EPN Journey:** Annual insurance review reminders for borrowers with a link to a personalized quote page.

