January Product Update

January 14, 2026

TotalExpert®

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Customer IQ

Consent: Data Points for Aggregation

Unifying consent capture across various systems, Total Expert has created new EAPI endpoints to store appropriate consent information attached to a contact record.

- Consent status can be recorded in the Contact Profile's Communication Preferences, including an opt-out mechanism.

- Historical audit ledger gives teams a point-in-time view of how and when consent was captured or updated.

- **Initial functionality will provide journey-level-protection to only trigger Voice AI calls when valid consent is present.**

Communication Preferences

Email
Able to contact

SMS
This contact needs to opt-in to receive SMS messages from you from you before you are able to message them.

Postal Mail
N/A

Phone
Able to Contact

Send opt-in request

AI Communications
Able to Contact

End of January

Consent

TotalExpert

Ecosystem

Fusion: Modern LOS Integration Platform

Keep loan data accurate and up to date with real-time sync, SMS opt-ins, greater flexibility and transparency.

- Improves segmentation by syncing all relevant fields so marketers can build audiences with complete, current data

- Enhanced setup with searchable field mapping and clearer configuration options

- Supports future LOS connections with a more flexible, stable integration framework

*Professional Services engagement required.*

Live

Next Gen Encompass

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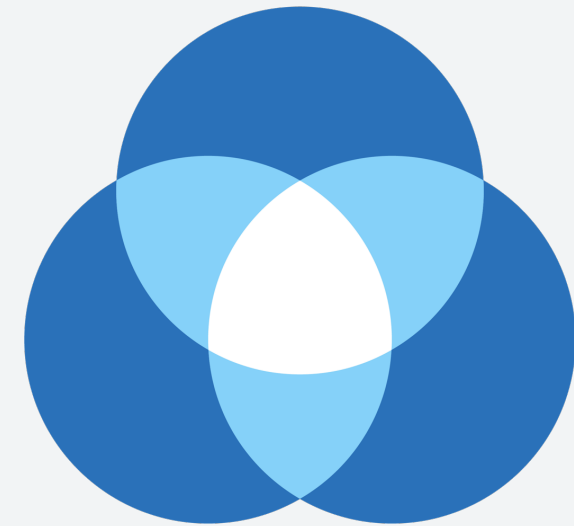
Content Library

Enhanced Content Search

Smarter search in the Content Library (print materials, social media content, email templates) that finds relevant assets based on content naming, descriptions, tags, reference numbers, and email subject lines.

Provides more comprehensive coverage while displaying the most relevant files first.

Live

Content Library

BEFORE

AFTER

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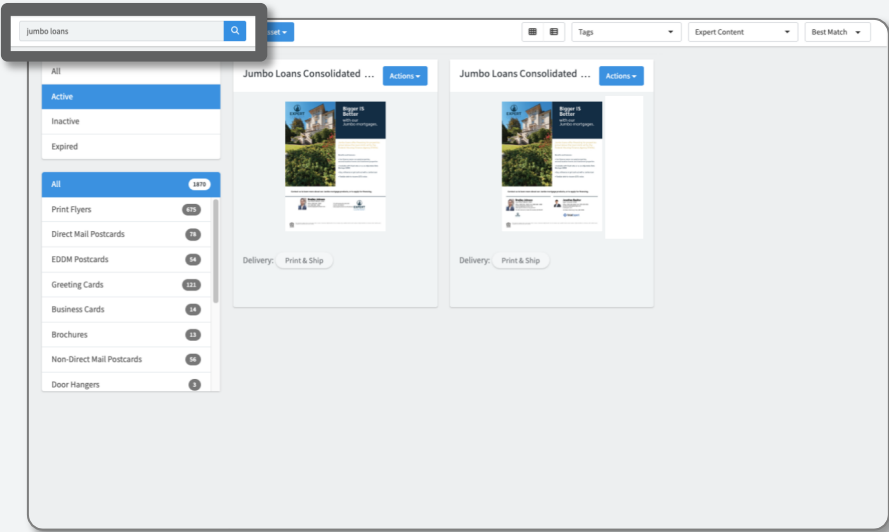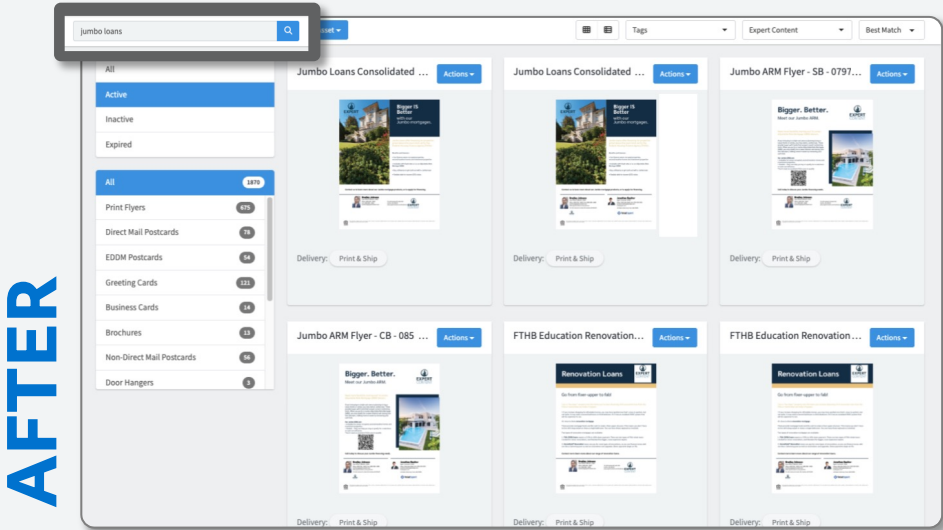
AI Sales Assistant

Warm Transfers to Loan Officers

Originators receive the context of a phone conversation from the AI Sales Assistant when joining a call with a prospect, enabling them to naturally join and continue the conversation.

Once the originator joins the call, AI Sales Assistant:

- Introduces the originator to the prospect

- Outlines the purpose of the conversation

- Adds any additional relevant details

The AI Sales Assistant will then drop from the call and let the originator and prospect continue the conversation.

Live

AI Sales Assistant

TotalExpert

Total Expert for Salesforce

Bi-Directional Contact Sync

TE4SF clients can now allow contacts created or updated in Total Expert sync with their Salesforce instance.

From within Salesforce, admins will be able to:

- Configure a data mapping for contacts created within Total Expert and define data flow direction at the field level for updates to be reflected in Salesforce

Loan officers will then be able to:

- Leverage Total Expert single-property sites and lead-capture apps, as contacts created through those channels will be synced to Salesforce.

salesforce

Live

Salesforce

TotalExpert

Total Expert for Salesforce

Initiate Total Expert Emails Directly from Salesforce

Salesforce users can now leverage marketing-approved templates, co-branded content, and compliant tracking from Total Expert.

From within Salesforce, users will be able to:

- Browse, search, and preview Total Expert email templates

- Select a template and send to one or many recipients

- Customize content before sending

- Include co-marketing partners

salesforce

Live

Salesforce

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Marketing Center

Engage SMS: User-Level Reporting

Admins can now access user-specific reporting on Engage SMS utilization and segment usage via a custom report request.

Requests should go through the client's usual support or CSM channel and specify "User-Level Engage SMS Report."

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Engage SMS

TotalExpert
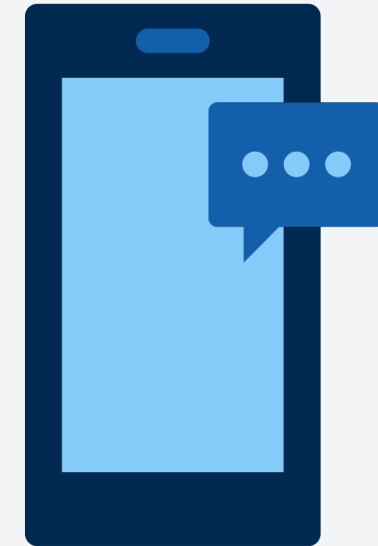
Expert Partner Network

Tiff's Treats

Leave a lasting impression by automatically sending fresh-baked cookies to your borrowers—creating a personal, memorable touch that sets you apart

- Once a loan closes, a journey will trigger sending the consumer's details to Tiff's Treats to initiate the delivery of the cookies.

- Supports warm delivery for eligible ZIP codes and shipped delivery for all others.

Live   Ecosystem

Password Lockout

- Total Expert will soon lock out users after multiple failed login attempts in both the browser and the mobile app.

- When a user exceeds the allowed number of attempts, their account will be temporarily locked.

- Admins can unlock accounts directly from the admin experience, limiting reliance on IT or support tickets.

- **This update does not apply to organizations using SSO.**

Early February

Platform

TotalExpert

Expert Content

New Print Templates

- New door hanger templates (single-brand and co-branded), including MLS-integrated options.

  - Flexible messaging controls: change titles (e.g., Open House, Just Sold, Just Listed) and override property details or imagery.

  - Admin-configurable layouts to manage editability for text, imagery, branding, and QR codes.

- New yard sign and sign rider templates (blank and layout-based) for fast, on-brand field marketing.

Live | Print