

July Product Update

July 15, 2026



Loan Officer Productivity

Lead Management

- **Referral Partner Management:** Converts “Referred By” into a structured contact relationship. LOs can link a referral source, filter Pipeline Views by partner, and trigger automated thank-you Journeys when a referral comes in.
- Use Lead Source as a targeting condition, enabling more precise automation based on how a lead was acquired.
- Leads from **Zapier, Evocalize, and Ylopo** now flow directly into the Lead Management pipeline with full routing, Journey, and reporting support.
- UTM parameters now supported in the Lead Management External API and importer.

Anna Realtor

Referral Partner

Address: — | Cell: 612-548-1374 | Email: anna.premiumrealtor@gmail.com

ProfileLeadsReferralsProductsMarketingOffice365ActivityInsightsResponses

Scott Williams
\$594,000.00
NEW LEAD

Matt Jones
\$400,000.00
CONTACT ATTEMPTED

Brook Daunter
CONTACT ATTEMPTED

Lead Opportunity Details

Lead Qualification

Desired Timeframe
Next 30 days

Already Found Home
Yes

First Time Buyer
No

Veteran
No

Loan Details

Loan Amount
\$594,000.00

Estimated Purchase Price
\$660,000.00

Contacts

My ContactsLead PipelineCustomer IntelIn-processReferral PartnersAI Agent

TOTAL LEADS
182
\$64M

ACTIVE PIPELINE
New Lead
45
\$16.6M

Hot Leads - IN MARKET NOW
0 of 174 selected

Brook Daunter
username12234231+Brook.Daun...
(621) 326-9322

Darby Sweeney
Darby.Sweeney@gmail.com
(401) 555-6512

Chris Gracely
bobbijo.dallas@totalexpert.com
(651) 260-8472

Jack Casey

Brook Daunter

Purchase
Contact Attempted

Refinance - Cash Out
New Lead

+ New Lead

Lead Opportunity Details

Last Activity

Lead Stage Changed
Changed from New Lead to Contact Attempted

Lead Details Updated
Lead opportunity details updated.

Lead Qualification

Desired Timeframe
Next 30 days

Already Found Home
Yes

Veteran
No

Loan Details

Loan Amount
\$594,000.00

Estimated Purchase Price
\$660,000.00

REFERRAL PARTNER

Anna Realtor

(612) 548-1374 | anna.premiumrealtor@gmail.com

LEADS FROM ANNA

Contact	Stage	Purpose	Date
S. Williams	NEW LEAD	Purchase	Jun '26
M. Jones	CONTACT ATTEMPTED	Purchase	Jun '26
B. Daunter	CONTACT ATTEMPTED	Purchase	May '26
B. Daunter	NEW LEAD	Refinance - Cash Out	Apr '26

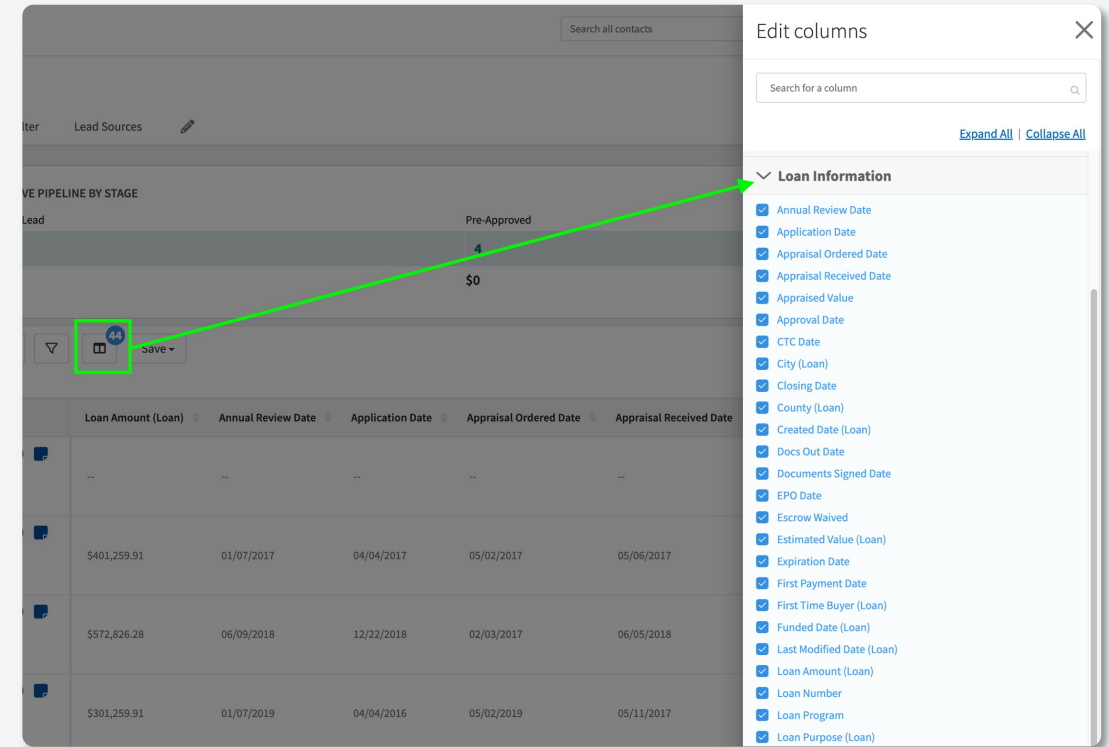
Close

View referral partner details →

Loan Officer Productivity

Pipeline Views: Loan Data Columns

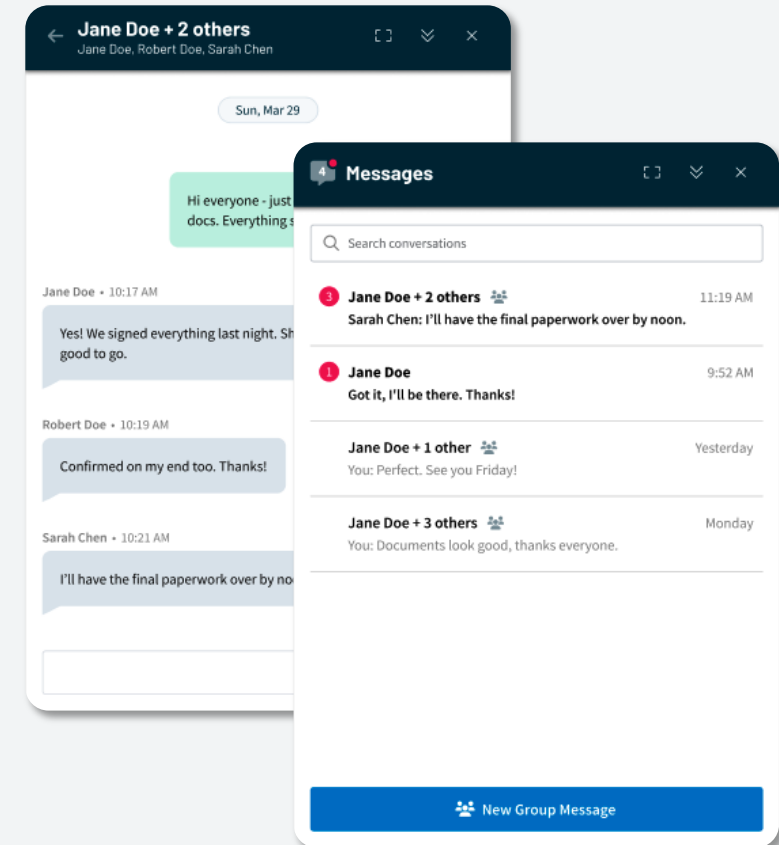
- 44 standard loan fields – including Loan Amount, Type, Status, Rate, and Closing Date – are now available as Pipeline View columns.
- Columns can be sorted ascending or descending, reordered, or removed at any time.
- When a contact has multiple loans, the most recent loan matching the view's filter criteria is shown.



Engage SMS

Engage SMS: Group Messaging

- Start group SMS conversations with multiple participants: co-borrowers, agents, and title contacts.
- Automatically surfaces relevant contacts from the loan record when starting a group thread.
- Group conversations appear alongside individual ones with clear visual indicators and unread flagging.
- *Group Messaging for Mobile coming in August*

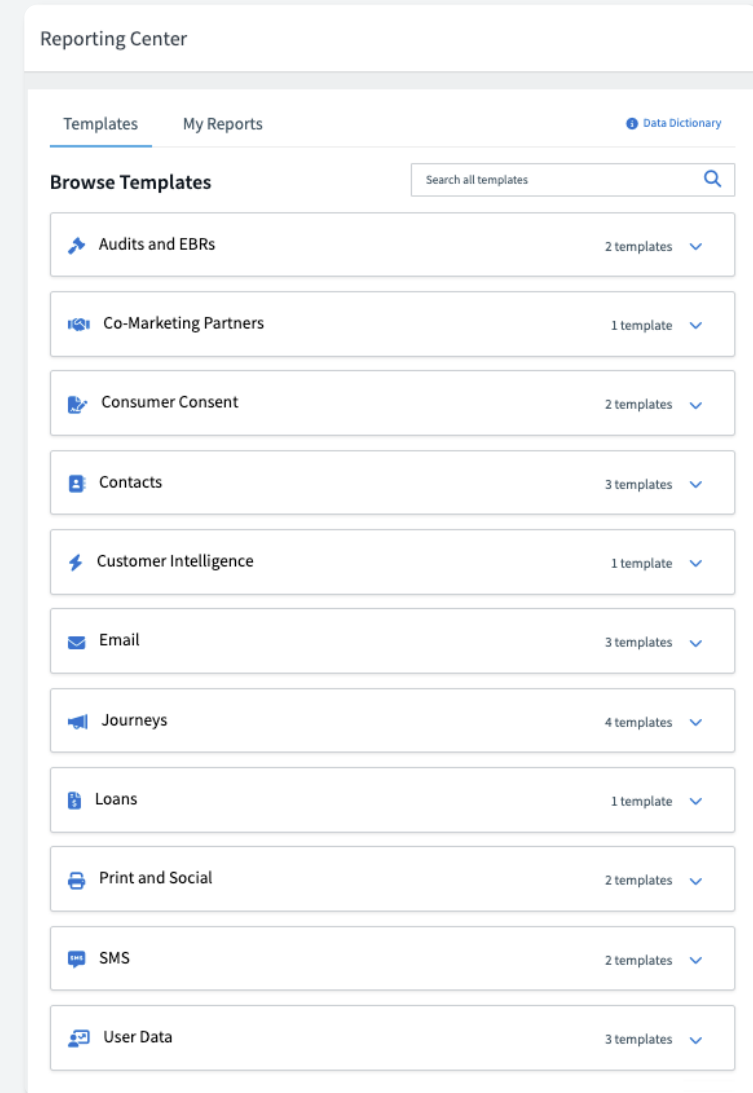


Data/Analytics

Reporting Center Updates

- **Consent Report:** AI Voice consent grants and revocations with contact and owner context, filterable by date range.
- **Customer Intelligence ROI Template:** Three views – raw loans, LO-level, and org-level – showing the business impact of CI signals.
- **SMS Conversational Data:** Conversational messaging now included in SMS reports alongside existing send and delivery metrics.
- **Print & Social Utilization Filters:** Filter utilization data by user email, team, and cost center to segment by org structure.
- **Last Outcome + Last Outcome Date on Contacts Report:** Both fields now available in the standard Contacts template.
- **Journey ROI Description Update:** Attribution logic specifies which journey is credited when a contact is enrolled in more than one.

Generally Available



Expert Content

New Expert Content Releases

Ready-to-deploy assets that keep loan officers visible between transactions, surface timely refinance opportunities, and celebrate the milestones that matter to homeowners.

- **DIY Home Tips & Tricks postcards:** 24 postcards covering home improvement topics – painting, cabinet hardware, front door upgrades, and more. Single-branded and co-branded across direct mail, non-direct mail, and EDDM.
- **CI Rate Alert Journey:** Refreshed 10-day timeline with SMS as primary touchpoint, focused on rate reduction and lowering monthly payments.
- **Loan Anniversary Journey:** A three-year email journey celebrating a borrower's home anniversary annually – available in a celebratory version or one with equity and refi messaging.

Generally Available



Integrations

New Integration: Tidalwave

Tidalwave POS and Total Expert now stay in sync across the loan lifecycle – enabling Journey automation triggered by real-time application activity.

- **Automatic contact creation:** Borrowers who originate in Tidalwave are automatically created or matched in Total Expert with full details and LO assignment – no manual import required.
- **Real-time application Insights:** Application started, submitted, and abandoned signals fire as Insights in Total Expert, triggering Journey follow-up at exactly the right moment.
- **Launch application from Total Expert:** Initiate a Tidalwave application directly from a contact record via ODC – no duplicate data entry.

Generally Available

The logo for Tidalwave, featuring the word "tidalwave" in a lowercase, blue, sans-serif font. The "i" and "d" are connected by a stylized wave graphic.