

June Product Update

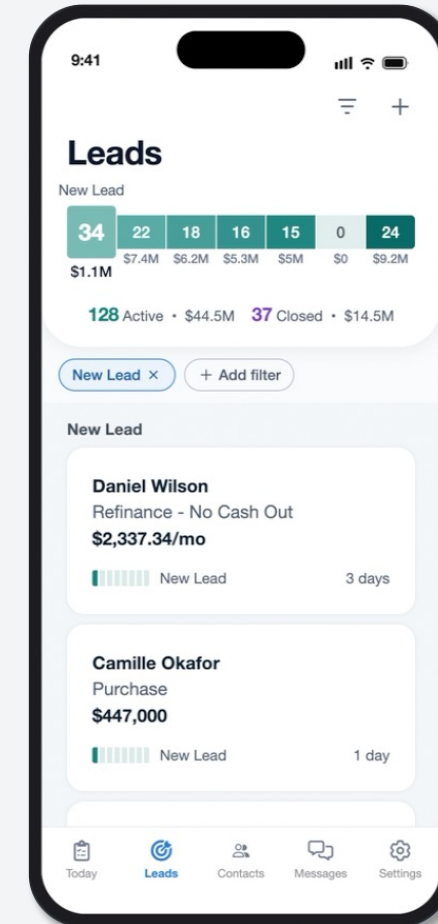
June 10, 2026



Loan Officer Productivity

Lead Management

- **LOS-driven lead stage updates:** Lead stages now advance automatically when loan status changes in the LOS – no manual update required.
- **Lead Sharing:** Include lead details in ODC payloads to third-party systems like AI sales agents and dialers.
- **New Lead Fields:** UTM parameters and other standard fields added to Lead Management for better source tracking. *Coming end of June.*
- **Lead Management in Mobile:** View leads, create new leads, and log notes and outcomes from the mobile app. *Targeting June 23.*



Enrichment & Insights

Credit & Debt Enrichment



- **Tradeline-level debt data:** Contact profiles now display balances, utilization rates, payment amounts, and interest rates for enriched segments.
- **Segment definition:** Admins define which segments of their contact population receive enrichment.
- **Insight alerts:** Loan officers are notified when a contact's debt profile signals a debt-related opportunity.
- **Journey conditions:** DTI, auto loan balances, mortgage data, and credit score are now available as Journey trigger conditions.

Profile Leads Loans Marketing Communications Activity **Credit Profile** Responses

• Data Enriched Mar 11, 2026 Exact values expire May 05, 2026 • 59 days

Credit Score	DTI Ratio	Mortgage Rate	Monthly Mortgage
680	40% <small>ELEVATED</small>	6.25%	\$3,000 <small>HIGH PAYMENT RATIO</small>

FINANCIAL OVERVIEW

Est. Income \$58K <small>Annual</small>	Open Trades 15 <small>Total</small>	Open Debt Balance \$200,000 <small>Total</small>
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MORTGAGE & HOME EQUITY

Mortgage Balance \$150K <small>Total</small>	Total Mortgage Balance \$180K <small>All mortgages</small>	Open Mortgages 1 <small>All mortgages</small>
HELOC Lines 1 <small>Open home equity</small>		

AUTO

Auto Balance \$50K <small>Total</small>	Monthly Payment \$750 <small>Auto only</small>	Auto APR — <small>Not available</small>
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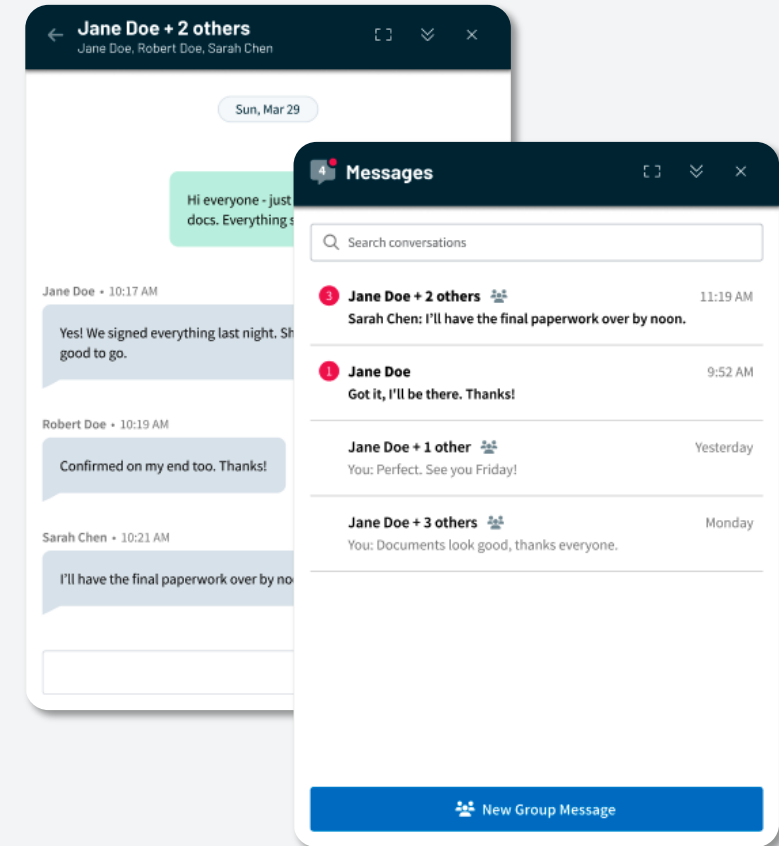
OTHER DEBT

Revolving Debt \$30K <small>Incl. HELOC</small>	Revolving (excl. HELOC) \$0 <small>Credit cards etc.</small>	Installment Balance \$15K <small>Total</small>
Student Loans \$30K <small>Total balance</small>	Non-Mortgage Debt \$40K <small>Open total</small>	

Engage SMS

Engage SMS: Group Messaging

- **Group conversation creation:** Start group SMS conversations with multiple participants: co-borrowers, agents, and title contacts.
- **Loan-aware suggestions:** Automatically surfaces relevant contacts from the loan record when starting a group thread.
- **Consistent inbox experience:** Group conversations appear alongside individual ones with clear visual indicators and unread flagging.
- **Mobile coming in August:** Desktop available late June; mobile group messaging follows in August.



Data/Analytics

Reporting Center: Engage SMS

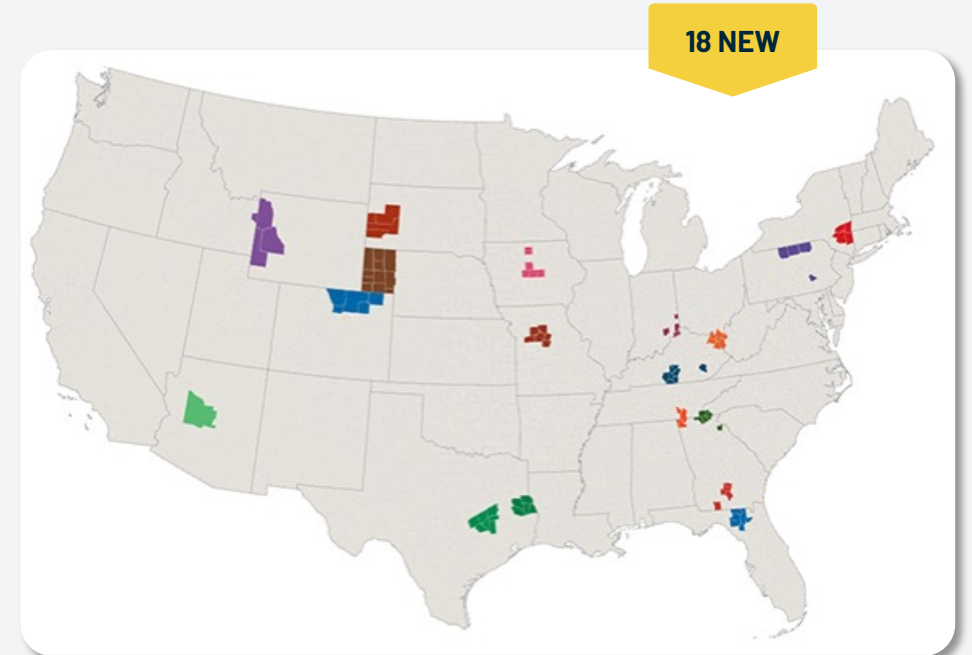
- **New self-service SMS report:** Admins can now access Engage SMS utilization data directly from the Reporting Center – no request required.
- **Replaces manual process:** Eliminates the need to submit custom report requests through support or CSM channels.
- **What's included:** Message volume, opt-in rates, and user-level activity – available upon release with no configuration.

user first name	user last name	user phone	contact phone	contact first name	contact last name	message body	delivery status	send date	segment count
James	Carter	(612) 555-0101	(612) 555-0201	Sarah	Mitchell	That works for me, or if you wa	delivered	2026-01-22	1
Emily	Thompson	(612) 555-0102	(612) 555-0202	David	Nguyen	Hi David, it's Emily from Expert	delivered	2026-01-29	2
Michael	Harris	(612) 555-0103	(612) 555-0203	Jessica	Patel	Great, I am having my colleague	delivered	2026-01-29	1
Ashley	Rivera	(612) 555-0104	(612) 555-0204	Brian	Torres	Hi Brian, I just sent them again	delivered	2026-01-20	1
Christopher	Evans	(612) 555-0105	(612) 555-0205	Amanda	Scott	Absolutely - Thank you for chat	delivered	2026-01-28	1
Megan	Walker	(612) 555-0106	(612) 555-0206	Kevin	White	Yes, it absolutely will work in N	delivered	2026-01-31	1
Daniel	Hall	(612) 555-0107	(612) 555-0207	Laura	Green	Okay. Perfect! Tomorrow arou	delivered	2026-01-09	1
Brittany	Young	(612) 555-0108	(612) 555-0208	Justin	Adams	Yes, absolutely! We'll reach out	delivered	2026-05-08	1
Ryan	Baker	(612) 555-0109	(612) 555-0209	Nicole	Nelson	I will also send a more complet	delivered	2026-01-15	1
Stephanie	Gonzalez	(612) 555-0110	(612) 555-0210	Tyler	King	You should have received the €	delivered	2026-01-15	2
Nathan	Perez	(612) 555-0111	(612) 555-0211	Melissa	Wright	If you go back to a 30 year yes i	delivered	2026-01-02	2
Rachel	Campbell	(612) 555-0112	(612) 555-0212	Aaron	Hill	not a problem! I'll get everythin	delivered	2026-02-20	2
Joshua	Mitchell	(612) 555-0113	(612) 555-0213	Heather	Moore	Just so I know what to put on t	delivered	2026-02-06	2
Lauren	Roberts	(612) 555-0114	(612) 555-0214	Eric	Clark	ok perfect, once I have that let	delivered	2026-05-19	2
Andrew	Turner	(612) 555-0115	(612) 555-0215	Samantha	Lewis	That sounds great! What time i	delivered	2026-03-23	1
Kayla	Phillips	(612) 555-0116	(612) 555-0216	Brandon	Lee	Great, you will be in great hand	delivered	2025-12-31	1
Tyler	Parker	(612) 555-0117	(612) 555-0217	Amber	Allen	I'll get back to you soon. I'm on	delivered	2026-02-10	1
Hannah	Collins	(612) 555-0118	(612) 555-0218	Derek	Martinez	Okay awesome, congratulation	delivered	2026-03-03	1
Zachary	Edwards	(612) 555-0119	(612) 555-0219	Tiffany	Jackson	Once I have this I'll be able to s	delivered	2026-01-27	1
Brittney	Stewart	(612) 555-0120	(612) 555-0220	Marcus	Thomas	Hi Marcus, I am working on res	delivered	2026-02-13	1

Integrations

Expanded MLS Coverage

- **18 new MLS connections:** Coverage now includes IRES, Bryan-College Station, Central Iowa, Teton, Greater Chattanooga, Prescott Area, Black Hills, and 11 more boards across PA, TX, MO, KY, GA, IN, NE, and beyond.
- **Who benefits:** All users of listing flyers, single property sites, and MLS-integrated print assets.
- **No action needed:** New connections are live upon release.



Expert Content

New Expert Content Releases

- **Seasonal postcards – home maintenance:** 24 postcards across all seasons, in single-branded and co-branded variations for direct mail, non-direct mail, and EDDM.
- **Email Builder header options:** New left- and right-aligned logo-only header blocks now available in the Content Block Gallery alongside the existing centered option.



Generally Available

Expert Content