September Product Update

September 9, 2026

TotalExpert

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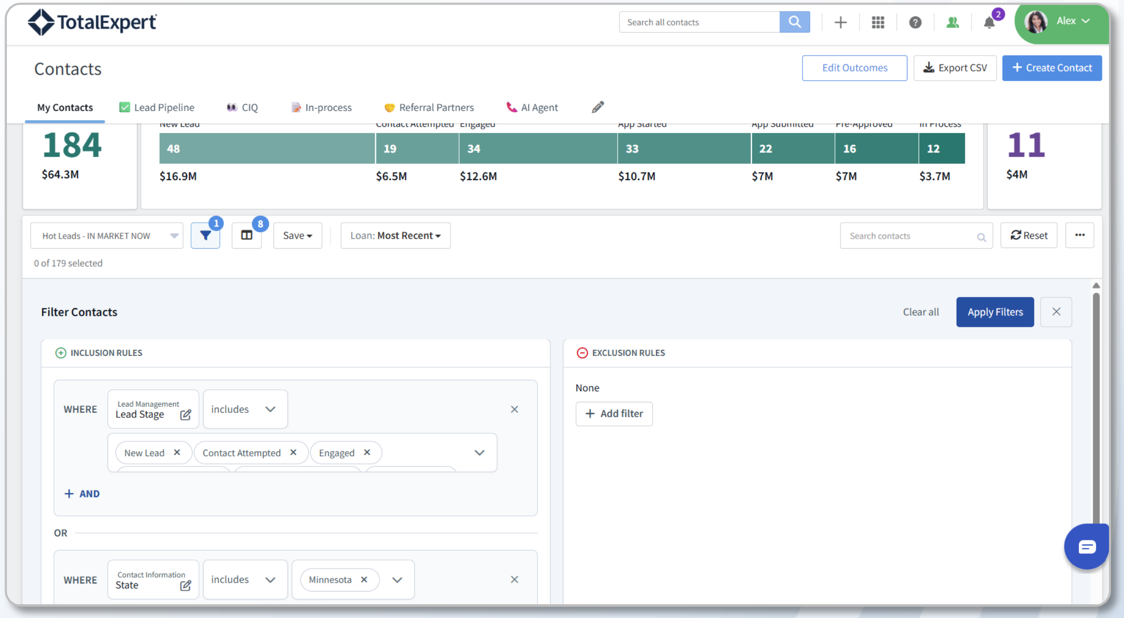
Loan Officer Productivity

Pipeline Views Expansion

- **Custom Loan Fields as Columns:** Admins can now add custom loan fields as columns in Pipeline Views, bringing custom data directly into the pipeline alongside standard fields.
- **And/Or Filter Conditions:** Pipeline View filter rules now support both And/Or logic for more sophisticated inclusion and exclusion rules — stack conditions to build precise pipeline segments.
- **Most Recent vs. Last Funded Loan:** Admins configure whether Pipeline Views show the most recent loan or the last funded loan per contact, based on organizational workflow.
- **Email Unsubscribed Field:** “Is Email Unsubscribed” is now available as a Pipeline View column, filter, in Customer Intelligence settings, and in Campaign Builder audience rules.



Generally Available

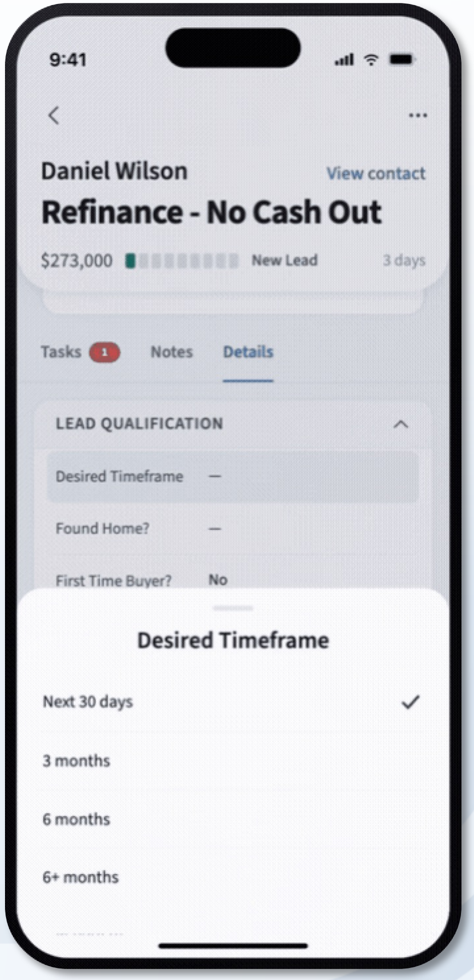
Pipeline Views

TotalExpert

Mobile App

Edit Contacts & Leads on Mobile

- **Edit Contacts and Leads:** LOs can now edit contact and lead records directly from the mobile app — all standard and custom fields. Requires app version 7.1.0+.
- **Mobile UX Refinements:** Edit Contact and Edit Lead screens redesigned for mobile-first workflows, with quick actions for Note, Outcome, and SMS directly from the mobile pipeline view.
- **Loan Association on Mobile:** Link and manage loan associations directly from the "Lead Details" view on mobile, matching desktop capabilities. Unlink loans as needed to keep records accurate.



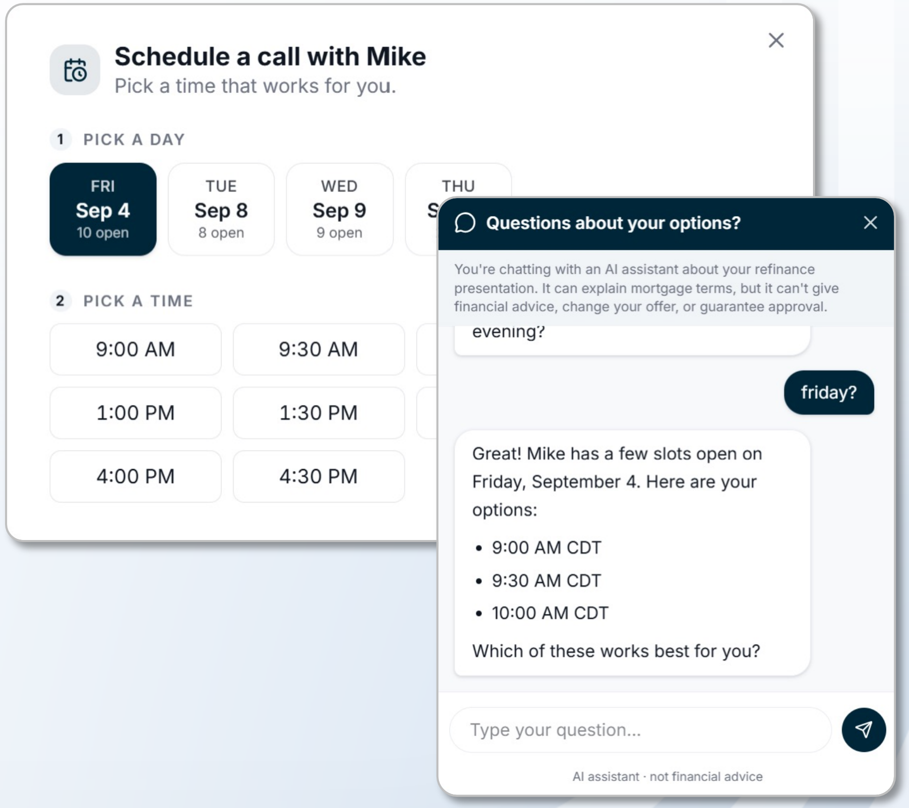
Generally Available

Mobile App

AI Assistants

Calendar & Appointment Scheduling

- Both AI assistants can now check an LO's Outlook/Office 365 calendar and book appointments directly.
- AI SMS Assistant can book directly within SMS conversations.
- AI Scenario Assistant can book through the customer presentation page via a booking interface or in the consumer chat box.



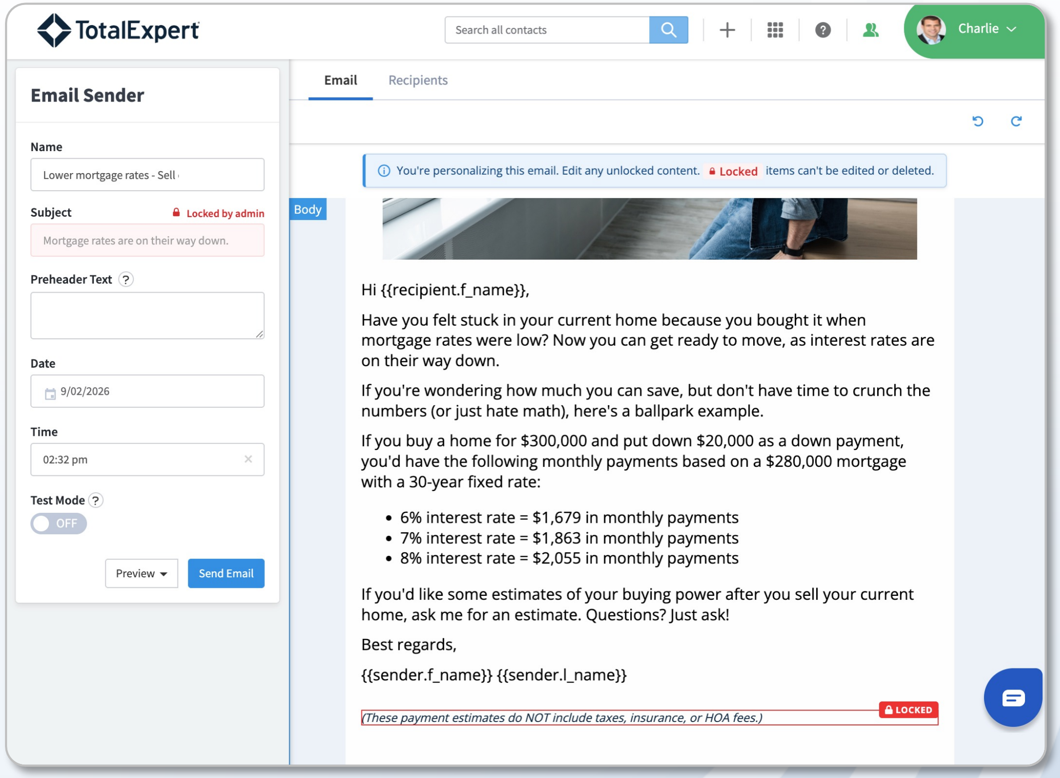
Generally Available

AI Assistants

Content

Email Builder: Locked Blocks

- **Lock email template blocks:** Admins can lock any block in an email template. Locked blocks remain visible to LOs but cannot be deleted — ensuring compliance-critical content stays in every email.
- **Safe LO editing access:** Admins can now expand email editing permissions to loan officers without risking removal of disclosures, signatures, or required footers.
- **How to get started:** Admins should review existing templates, identify compliance-critical blocks, and lock them before enabling LO editing access.



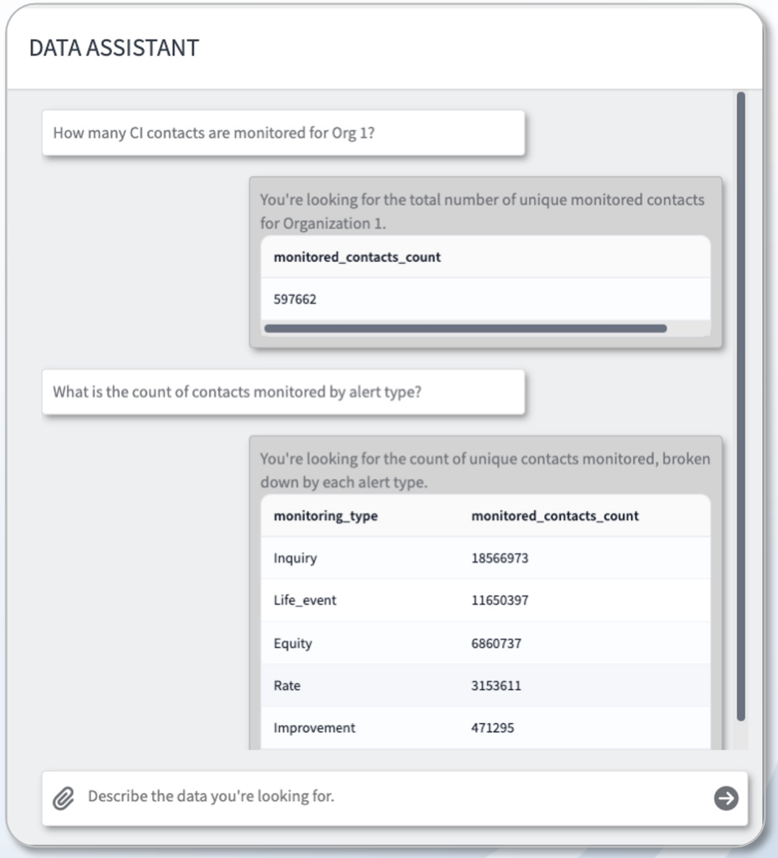
Generally Available

Content

AI & Automation

AI Data Assistant

- **Natural-language querying:** Admins ask questions about their Enrichment & Insights data in plain English and receive instant analytics, trends, and insights — no report-building expertise or support ticket required.
- **Audience:** Admins at organizations with Enrichment & Insights (formerly Customer Intelligence) enabled.
- **How to get started:** Contact your CSM to enable AI Data Assistant for your organization.



Available by Request

AI & Automation

Integrations

Bi-Directional Task Sync

- **Task API for External Systems:** Three new REST endpoints (POST, PATCH, DELETE) let external systems programmatically create, update, and delete tasks on Total Expert contact records with full field mapping.
- **Salesforce/Total Expert Sync:** Tasks created in either platform sync automatically in both directions — creates, updates, completions, and deletions. Requires TE4SF connection.
- **Task Assignment Control:** Tasks can be assigned to specific team members (e.g., LOAs) rather than only the originating LO, with Salesforce assignment reflecting the actual assignee.

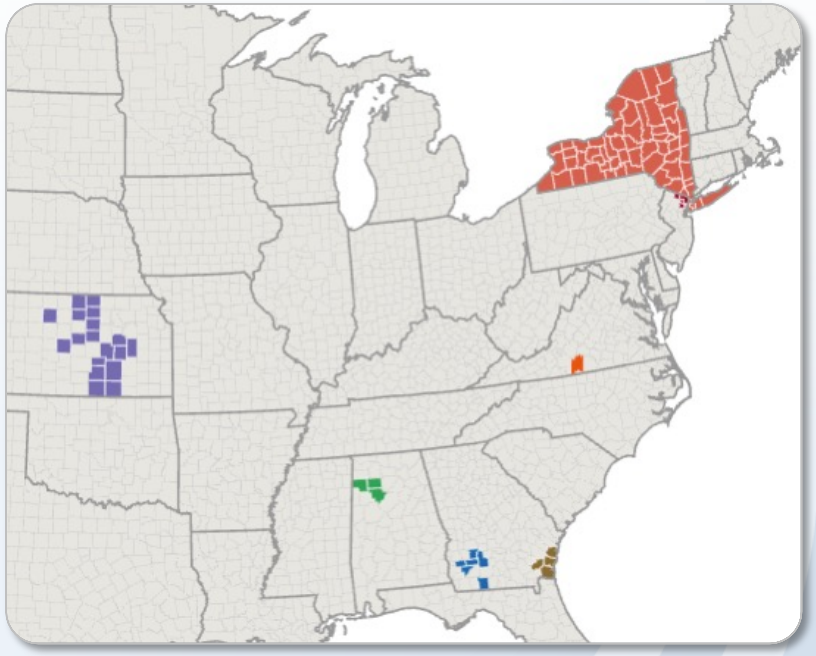
Available by Request

Integrations

Integrations

New MLS Network Additions

- **7 new MLSs added:** Albany Board of REALTORS (GA), Dan River Region Association (VA), Walker Area Association (AL), South Central Kansas MLS (KS), MyState MLS (NY), New Jersey MLS (NJ), and Scout MLS (GA).
- **Who benefits:** Loan Officers at organizations with MLS integrations enabled in their respective service areas.
- **How to get started:** LOs can configure their MLS Agent ID under MLS/IDX Settings in their account to view listings in their market.



Generally Available

MLS / Integrations

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Expert Content

New Expert Content Releases

- **Co-branded Rate-Only Flyers + Rate Flyer Enhancements:** Co-branded variations of the two existing rate flyers for both PPE-integrated and editable options.
- **New Single and Co-branded Flyer Footers:** Refreshed default flyer footers to improve alignment, increase headshot sizing, and allow more space for company logos.
- **Thank You and Birthday Greeting Card:** New greeting card designs intended for users to handwrite greetings and hand-address before mailing.

Quarterly Plan

Expert Content