**TOTAL EXPERT WINTER RELEASE**

**Mortgage Loan Officer Engagement Email**

The purpose of this asset is to help you drive adoption and encourage MLOs to use new Total Expert features specifically built for them going live in the Total Expert platform Dec. 9, 2020. This asset is meant to be customized and tailored to your organization and repurposed for the various channels you use to communicate software updates to your teams. As always, reach out to your CSM with any questions.

You can find this and other adoption resources in the [Engagement Resource Center](https://totalexpert.com/engagement-resources/).

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**SUBJECT LINE:** [Total Expert] Product Enhancements: Shiny New Tools for LOs!

**HEADLINE:** The latest [Total Expert] product enhancements are live!

**SUBHEAD:** Take advantage of new features specifically built to help you be more efficient, close more loans, and create lifelong customer relationships.

**BODY:**

**Listing Insights**   
Never miss an opportunity for repeat business with Listing Insights. Listing Insights is a new data point within the [Total Expert] contact details page that shows if your past borrower has listed a property for sale on the MLS in the last 7 days.

We’ve made it easy to know when your past clients are in the market for a new mortgage by giving you a Focused View of contacts with Listing Insights. We’ve also set up a Journey that will automatically send out an email on your behalf when your past client lists their home.

Don’t miss out on repeat business—Be sure to check your Focused View daily and opt-in to the Listing Insights Journey!

[Loan Officer’s Listing Insights Checklist](https://totalexpert-trainingteam.s3.us-east-2.amazonaws.com/TE_ListingInsights/End+Users+-+Getting+Started+with+Listing+Insights+(GA).pdf)

**\*Admin Note:** Listing Insights is available upon request through your CSM. It will not automatically be turned on for your users. Once you have the permission enabled, set up a Listing Insights Focused View and the pre-built best practice Journey to ensure LOs receive value.

**Enhanced SimpleNexus Integration**  
We've upgraded our integration between [Total Expert] and SimpleNexus to a two-way sync so contact and application data will be consistent across both systems. You can also now view SimpleNexus milestone data in contact records in [Total Expert] under Groups.

\***Admin** **Note:** The New SimpleNexus Integration is available if you’re currently using SimpleNexus and API access has been grated through your scope of work. Contact your customer success manager with questions.

**New Training and Product Resources**  
There are two new Total Expert training resources to help you get up and running with new features fast:

* *Training Center:* A new hub for all your Total Expert product education needs, including interactive feature walkthroughs, best practice webinars, feature spotlights, and additional training videos.
* *Product User Guides:* Thorough, step-by-step instruction on how to use every feature in the platform.

Both resources are available in the platform through the following steps.

1. Go to [totalexpert.net](http://totalexpert.net)
2. Log in with your username and password
3. In the top navigation bar, click the question mark help icon
4. Choose Training Resource Center or Product User Guide

**Do Not Contact**  
Do not contact allows you to suppress future emails, test messages, and print communications for a contact all in one action to honor client communication preferences.

Learn how to set a contact as Do Not Contact with this [Walkthrough Guide](https://totalexpert-trainingteam.s3.us-east-2.amazonaws.com/TE_DoNotContact/Limiting+Communication+Options.pdf)

Keep in mind, setting someone as Do Not Contact means:

* Any outbound emails and SMS messages will be suppressed from you and anyone in your organization.
* They will no longer appear in your Contact List.
* They will be placed in your Do Not Contact List.
* This action cannot be reversed – so make sure you want to proceed.

Log in to [Total Expert] to start benefiting from these new features: [Link to user account]