

Total Expert
FAQ'S



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LOGIN AND ACCOUNT INFORMATION:

1. How do I login to my account for the first time?

- Visit www.totalexpert.net/login/envoymortgage
- Type in your username (your envoy email address) then press "forgot password".
- You will then receive an email in your Outlook inbox. If you do not see the email, look in your junk/clutter folder.

- Once you find the email & reset your password, you will be able to login to the system!

2. What is the difference between using Envoy EDGE and Total Expert?

- Envoy EDGE is your go-to hub for recruiting, marketing trainings and support and customizable print materials such as trifold, posters, banners, flyers and more. Total Expert is used to automate and control your marketing via campaigns, static product and recruiting flyers, hundreds of emails, social media ads and more! Use Total Expert daily to monitor your database, track your pipeline and opt into drip campaigns, newsletters and market updates.

3. How do I change my personal information such as cell phone number, title or NMLS number?

- For branch information (phone number, fax, address, etc.) - email licensing@envoymortgage.com
- For personal information (phone number, address, etc.) – please update the information in ADP. If you can not update it there, please email HR@envoymortgage.com
- To upload your headshot– email your head shot to ITsupport@envoymortgage.com
- Website URLs – This can not be changed in the user profile but you can update this in each flyer. In your signature just put www.envoymortgage.com and it will forward it to your LO website. See question 9 for more details.

4. What if my password doesn't work?

- In the login screen, type in your user name (your Envoy email address) then press "forgot password". Once you click that button, you will receive a "password reset" email in your outlook inbox.

LOGIN AND ACCOUNT INFORMATION

6. How do I receive daily tasks?

- Total Expert users have the ability to receive a daily task updates and daily email summaries. These updates will be sent to the account holders email. These settings can be enabled in the User's Account Settings as shown below.

The screenshot shows the 'Account Settings' page in Total Expert. The user's name 'Halley' is visible in the top right. A dropdown menu is open, showing options like 'Account Settings', 'Email Settings', 'Integration Settings', etc. A red box highlights 'Account Settings'. Below, the 'Notification Settings' section is visible, with a red arrow pointing to it. The settings include:

Notification Type	Setting
Receive Text Message Lead Notifications?	No
Receive Daily Email Summary Notifications?	Yes
Receive Co-Marketed New Listing Alerts?	Yes
Receive Co-Marketed Pending Listing Alerts?	Yes
Receive Email New Task Notifications?	Yes
Receive Email Daily Task Notifications?	Yes
Receive Email Lead Notifications?	Yes

7. How do I update my website URL in Total Expert?

- Currently, you can only update the website URL in the Total Expert flyers. Once you choose your flyer and click 'Customize and Publish' scroll down to your signature block and add your custom URL.

The screenshot shows the flyer editor interface. On the left, there's a 'Draft Notes' section with a 'Save First Draft' button. The main content area displays a flyer for the 'NC First Home DPA Program'. The 'How to Apply' section is highlighted, and the 'Lender-ender' contact information is visible at the bottom. A red box highlights the 'Font Sizes' dropdown menu.

How to Apply
The NC Home Advantage suite of products is offered statewide by the NC Housing Finance Agency, a self-supporting public agency, through participating lenders. Contact the home buying partners below for more information or go to www.ncfha.com/home-buyers.

Larry Lender-Lender
Senior Loan Originator | Top 1,000, SAR 2236567
Envy Mortgage
P: (555) 555-5555
T: (555) 555-5555
Toluca, CA 92380

ENVOY MORTGAGE

CONTACT UPLOAD

1. How can I have additional contacts added?

- Contacts including current clients, prospects, buyers' agents, sellers' agents and settlement agents have been imported from Top of Mind, Hubspot and the LOS system. Additional contacts can be added manually or imported by sending a request to support@totalexpertinc.com. These contacts will be placed in the correct format, scrubbed and provided to Total Expert in the appropriate format needed. Upload requests are generally completed within 24-48 hours.

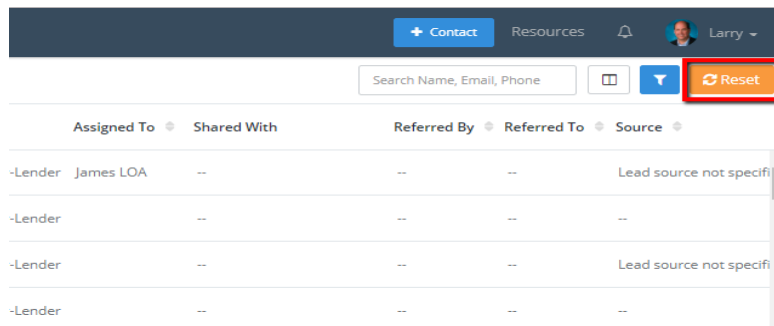
- To download the excel spreadsheet needed to upload your contacts, click the link https://www.dropbox.com/s/lmy4edc7l7v6g3t/TE_FlatFileTemplate_Contacts_Only.xlsx?dl=0

2. Do I need to clean up my database before I upload it?

- Yes, we recommend uploading the most current and accurate data to TE.

3. I am not seeing all of my contacts in Total Expert. Why?

- Whenever you click on an item in your dashboard, it sets a filter for your contacts. Therefore, whenever you open up your contacts make sure to clear the filter before you search through your database. If you still do not see your contact, please contact Total Expert through the chat feature.

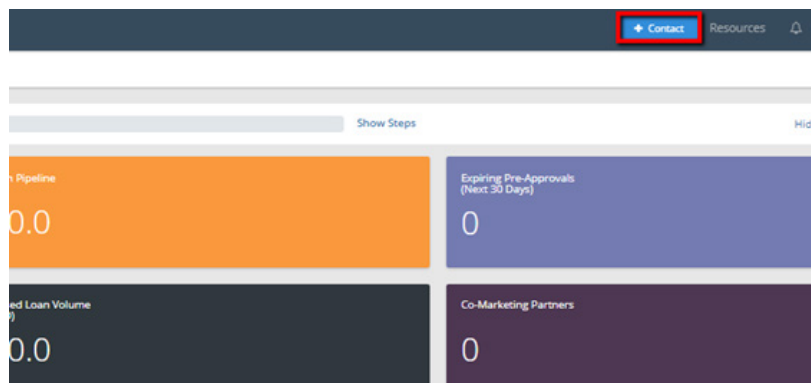


4. What if there are duplicates in my database?

- Total Expert has an extensive de-duping process when adding contacts into the system. However, if you do have a duplicate contact that needs to be removed, contact Total Expert by using the chat feature.

5. How do I manually add a contact into Total Expert?

- You will click the blue 'Contact' button in the top right corner and add their information in the next screen.



DATA SYNCHRONIZATION

1. I can't find a loan that is in the LOS. Who should I contact?

- Please reach out to marketing@envoymortgage.com if you are noticing your loans are not syncing over to your TE account.

2. Do I need to include anything in particular in the LOS for information to sync over?

- Yes, you need to enter a person's first and last name, birth date and email address in order for it to sync over.

3. How do Realtors sync over to TE?

- For Realtors, please make sure that you are adding their information in the "Vendor" screen within the LOS. Make sure to be thorough and enter as many details for your Realtors as possible; contacts entered into the LOS will sync over to your Total Expert database in real-time.

4. If I need to make updates to my borrower's contact information, how do I do that?

- Any edits that need to be made to your borrower's contact information or loan need to be made within the LOS. Updating this information only within Total Expert will be overridden by incorrect LOS data.

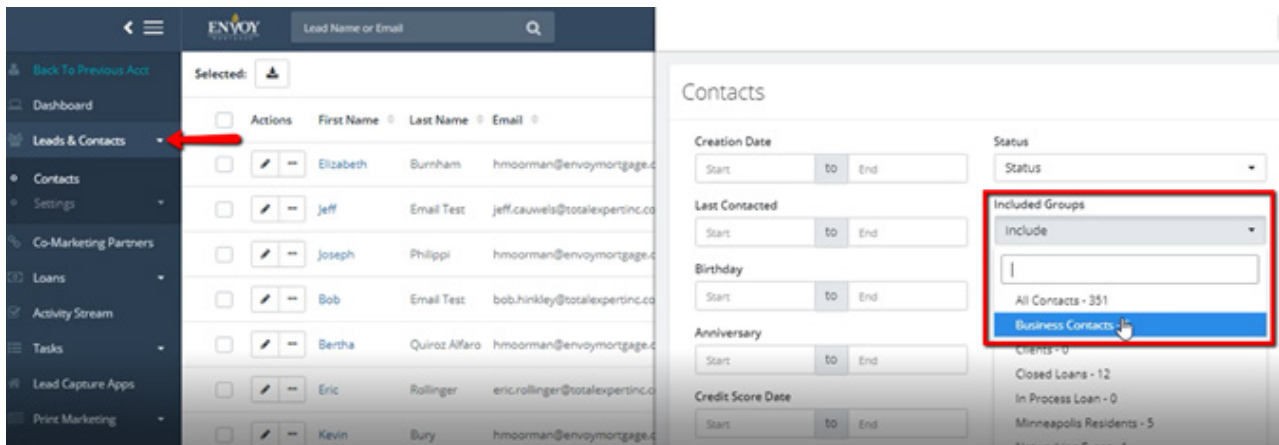
REALTOR AND BUSINESS PARTNERSHIPS

1. Do I need to be connected to an agent or business partner to produce co-branded materials?

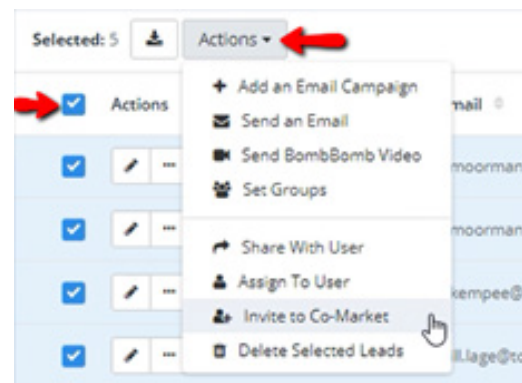
- Yes, in order for you to co-brand marketing materials, the agent must be a co-marketing partner of yours. To have them added, first add them as a contact (or find them in your Total Expert database if you have done business with them in the past) and select "Send Co-Marketing Invite" under actions. The agents/business partners will be sent an email with a link to register their account.

2. How do I add business contacts and send a mass invitation to all my Realtor and business partners to get them into my database?

- Your Realtor and business partners will not be automatically synced into your Total Expert Database from the LOS but will require you send them an invitation to the platform before they can be included. To send a mass invitation to all your Business Partners, go to "Leads & Contacts" then "Contacts". In the top right-hand corner, press the blue filter button. Once the filter is open, click on "Included Groups" then "Business Contacts". This will select all your Business Contacts in the system. Feel free to select any of the other filters (i.e. Real Estate Agent) if you'd like to filter more contacts.



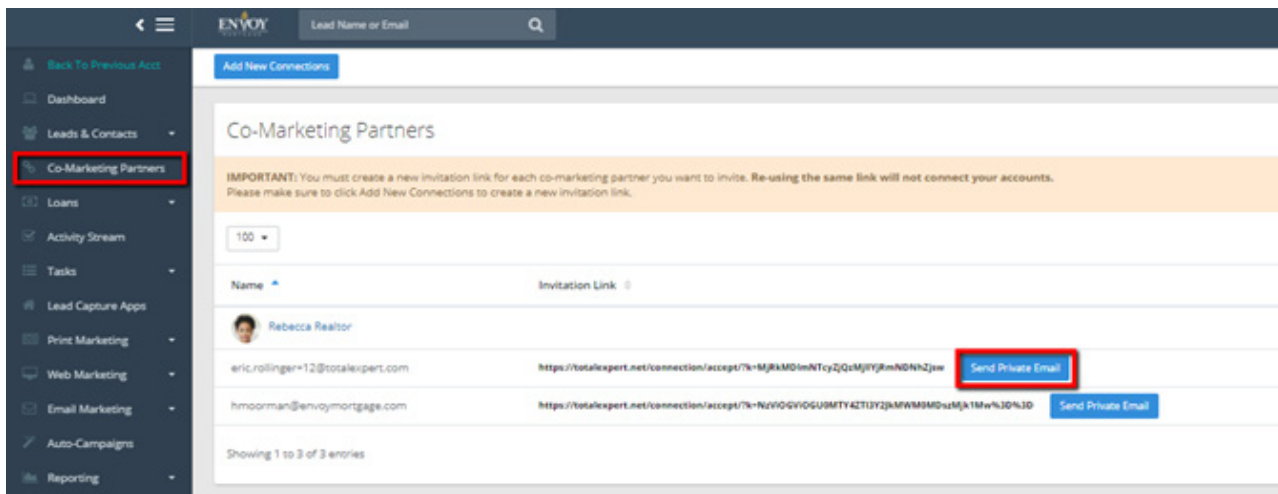
- From there, click the Business Contacts you'd like to invite. If you'd like to invite all, click on the check box at the top to select all contacts, then go to "Actions" > "Invite to Co-Market"



REALTOR AND BUSINESS PARTNERSHIPS

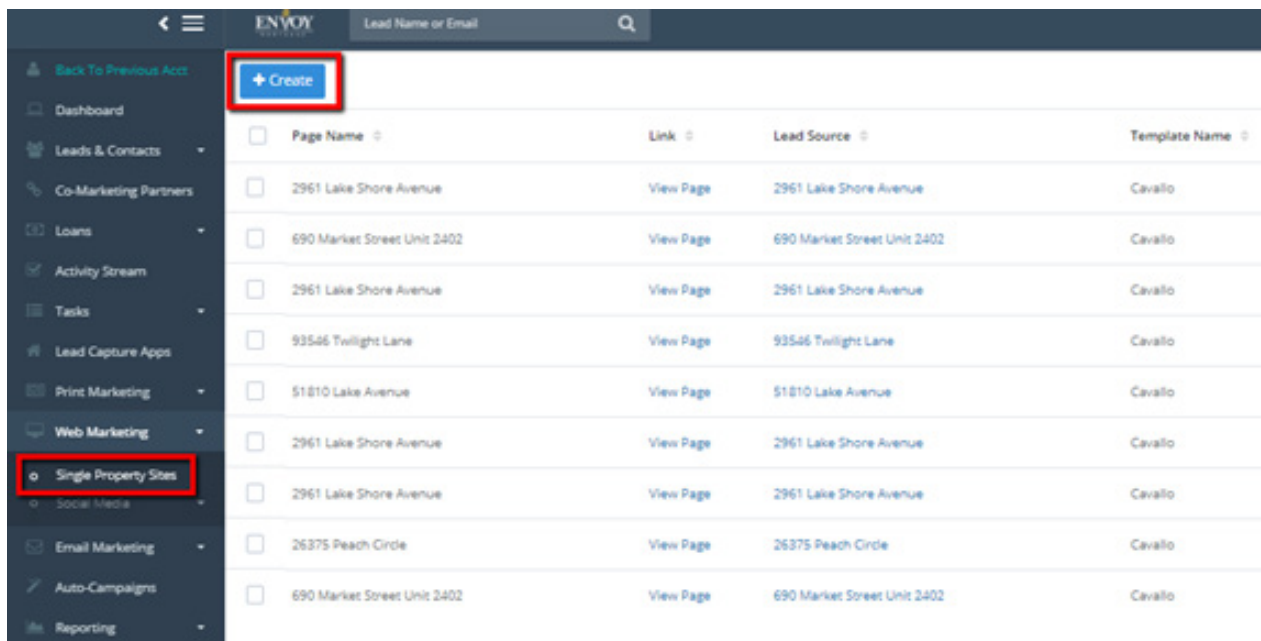
3. What if my Realtor or business partner isn't receiving my Total Expert Emails?

- You can send them a private email through Outlook asking them to join you on Total Expert. You can access that button by going to co-marketing partners -> send private email.



4. How do I make a single property site for my Realtor?

- You will go to Web Marketing -> Single Property Sites -> Create.



5. What other materials do we have for Realtor and business partners?

- We have many flyers, postcards, emails and social media graphics ready for you to use. An easy way to find this material is to check the "Realtor Recruiting folder" for any of these categories.

REALTOR AND BUSINESS PARTNERSHIPS

6. What Total Expert items (flyers, emails, postcards, etc.) can be co-branded?
 - Any item that has "CB" at the end of the name indicates you can co-brand with any business partners within your database who have accepted your invitation to co-market. The majority of the postcards and flyers are available for co-branding.
7. How do I create a Lead Capture App?
 - Click "Lead Capture App" on the left-hand menu side. Once in, click the blue "Create" button at the top left. Select which type of layout you'd like, name your page (URL), select your lead source or add a new lead source, page title (what will appear as the title on your website page), all other details, then click "Save Landing Page" top left.
8. My Realtor's picture did not sync over from Top of Mind. How do I add it?
 - Realtor pictures and logos were not synced over during the transition from Top of Mind to Total Expert. All of your Realtor contacts will need to create their account with Total Expert and upload their pictures there. This will ensure that all of their information is correct and that their MLS listings are transferred over for you to use on the open house flyers and single property websites.
9. Can two LO's co-brand with one agent without the agent completing separate registrations?
 - Yes, if an agent is already signed up with an account, they will be able to accept the second invitation by just logging into their account when they follow the link.
10. What does my Realtor do if their MLS is not listed?
 - If your Realtor's MLS is not listed, they can click on other and proceed with creating their account. In the meantime, you or the Realtor can go to <https://info.totalexpert.com/mls-connect> to have their MLS added to the system.
11. Can I upload a headshot for my Realtor?
 - No. Total Expert support can upload the headshot for your Realtor or the Realtor can upload their headshot when creating their profile.
12. When filling out their co-marketing agreement, do Realtors have to enter their MLS username and password on the form?
 - They do need to enter their MLS username, but do not need to enter in the password. The password section is so they can create their Total Expert password.
13. After filling out the online co-marketing agreement, do Realtors have to pay a fee to access and utilize Total Expert?
 - The Realtors do not have to pay anything to access the system. The only cost they would incur is if they choose to professionally print a flyer or postcard. They can generate them as pdf for no charge.

DIGITAL MARKETING (EMAILS, CAMPAIGNS, VIDEOS AND SOCIAL MEDIA)

1. What automated campaigns are going out to my contact(s) through Total Expert?

- Auto-Campaigns include:
 1. Purchase-Prospect
 2. In-Process
 3. Post-Close

**Additional campaigns are available such as, monthly recurring emails, newsletters, products, borrower, Realtor recruiting, LO recruiting, birthday and anniversary campaigns, but require opt-in.*

2. How can I view an entire campaign at once?

- Go to "Email Marketing" > "Drip Campaigns"> then click "Actions" next to the campaign you wish to view to see the emails included in each email campaign. You can review each email individually by click the "View" button next to each email. At this time, there is not an option to download entire campaigns into PDF format.

3. What in-process email updates do my borrowers receive during the loan process?

- Please see below for a list of the in-process emails your borrower will receive.

DESIGNATED HTML EMAIL MILESTONES

1. Welcome Email
2. Title Ordered
3. Appraisal Received
4. Title Received
5. Referral Request
6. Loan Status Updates
7. Satisfaction Survey - Title Agent
8. Satisfaction Survey - Realtor

DESIGNATED VIDEO MILESTONES

1. Documentation Video
2. Appraisal Video
3. Underwriting Video
4. Final Approval
5. Clear to Close
6. Closed

4. How do I view the available campaigns?

- To review campaigns, go to "Auto-Campaigns" on the left side navigation. You will be able to see if this campaign is active for your user ("Status" column) along with the number of eligible groups and contacts. Additional groups of contacts can be added by clicking the "Actions" button next to the auto-campaign.

DIGITAL MARKETING (EMAILS, CAMPAIGNS, VIDEOS AND SOCIAL MEDIA)

5. Who will be receiving in-process emails going out on my behalf?

- The borrower, buying agent, the LO, and the listing agent (on select milestones).

6. Which campaigns can be co-branded?

- The auto-campaigns mentioned above cannot be co-branded; however, other drip campaigns available in Total Expert can be co-branded with referral partners of your choosing.

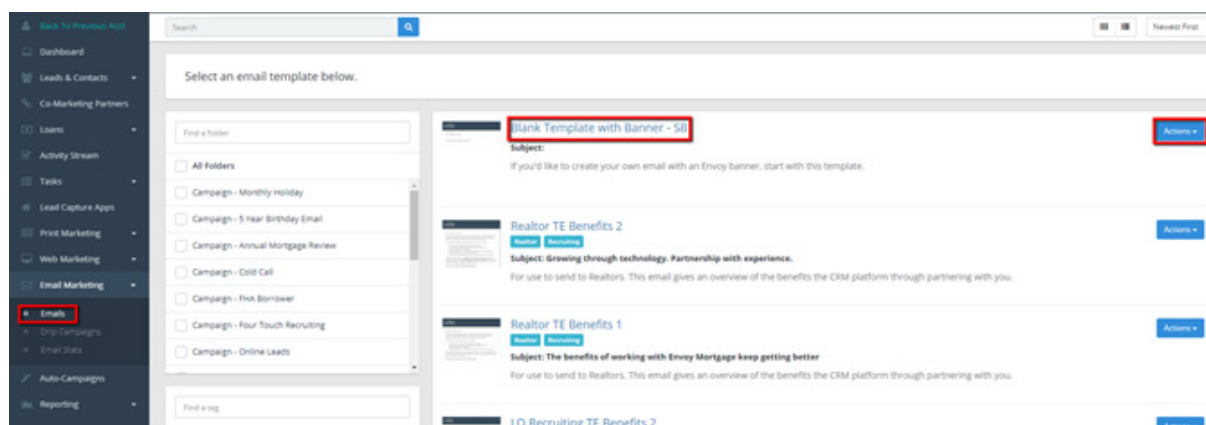
7. Will the new in-process videos contain variable fields?

- At this time, the new in-process videos will not contain variable fields; however, the LO contact information will be available in the email communication for these videos.

8. How do I edit an email?

- Existing emails within the Total Expert library cannot be edited. This will soon be changing to allow editing capabilities for you, the LO. In the meantime, we suggest recycling content you wish to edit from an existing email by creating a new email. See instructions below:

- Go to Email Marketing Emails
- Choose the template 'Blank Template With Banner'
- Choose 'Edit'
- Fill out your email, add contacts and send!



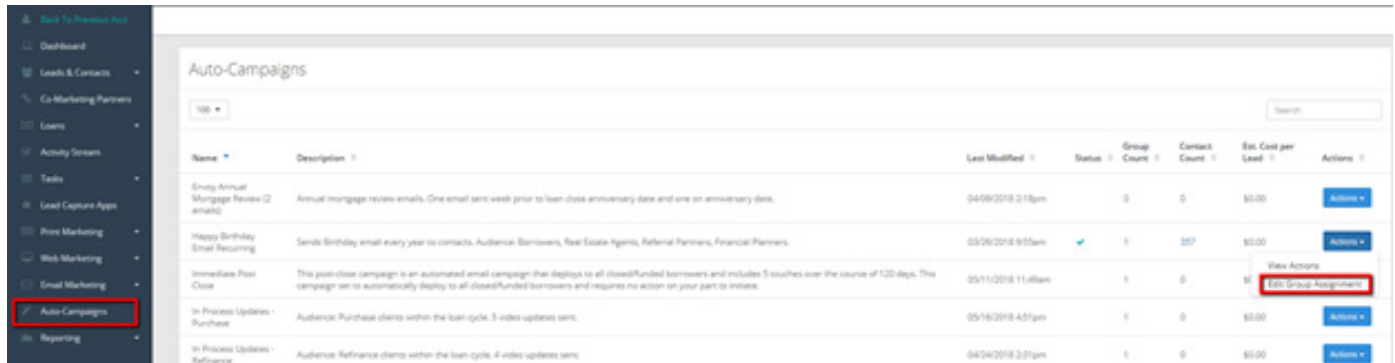
9. Does Total Expert provide newsletters to send to referral partners?

- Yes, these are provided on a weekly and monthly basis and can be found under the "Email" section in the newsletters folder.

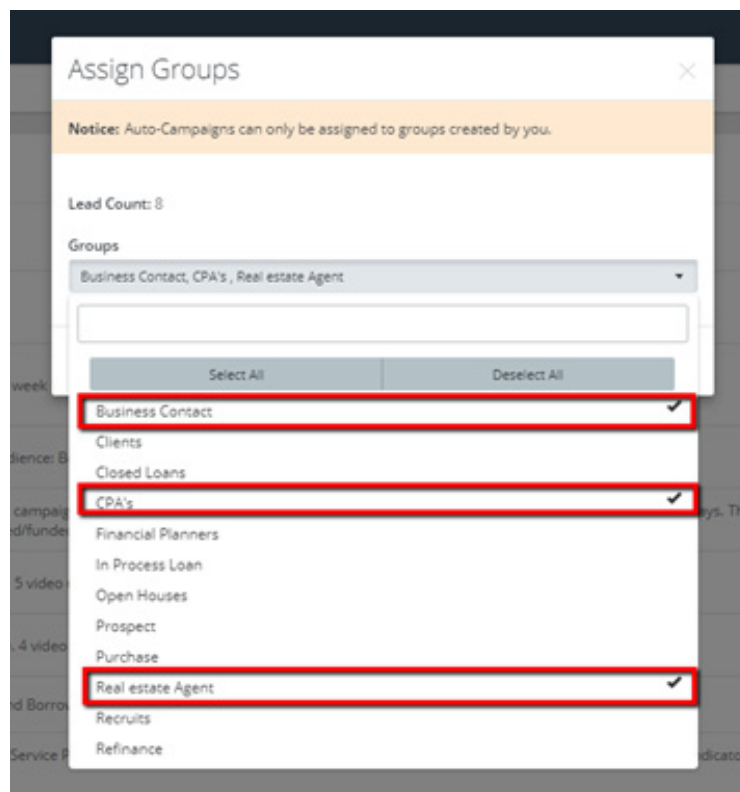
DIGITAL MARKETING (EMAILS, CAMPAIGNS, VIDEOS AND SOCIAL MEDIA)

10. How do I turn off an auto-campaign?

- Go to Auto-Campaigns
- Click "Actions" on the right of the campaign they want to turn off and press "Edit Group Assignment"
- Unselect all groups that the campaign is assigned to



Name	Description	Last Modified	Status	Group Count	Contact Count	Est. Cost per Lead	Actions
Every Annual Mortgage Review (2 emails)	Annual mortgage review emails. One email sent week prior to loan close anniversary date and one on anniversary date.	04/09/2018 2:18pm		0	0	\$0.00	Actions
Happy Birthday Email Recurring	Sends Birthday email every year to contacts. Audience: Borrowers, Real Estate Agents, Referral Partners, Financial Planners.	03/26/2018 9:55am	✓	1	257	\$0.00	View Actions Edit Group Assignment
Immediate Post-Close	This post-close campaign is an automated email campaign that deploys to all closed/funded borrowers and includes 5 touches over the course of 120 days. This campaign set to automatically deploy to all closed/funded borrowers and requires no action on your part to initiate.	05/11/2018 11:48am		1	0	\$0.00	Actions
In Process Updates - Purchase	Audience: Purchase clients within the loan cycle. 3 video updates sent.	05/16/2018 4:51pm		1	0	\$0.00	Actions
In Process Updates - Refinance	Audience: Refinance clients within the loan cycle. 4 video updates sent.	04/24/2018 2:31pm		1	0	\$0.00	Actions



Assign Groups

Notice: Auto-Campaigns can only be assigned to groups created by you.

Lead Count: 8

Groups

Business Contact, CPA's, Real estate Agent

Select All Deselect All

- Business Contact
- Clients
- Closed Loans
- CPA's
- Financial Planners
- In Process Loan
- Open Houses
- Prospect
- Purchase
- Real estate Agent
- Recruits
- Refinance

11. How does my borrower/referral partner opt out from emails?

- The borrower/referral partner has two options for every email: unsubscribe from the campaign or unsubscribe from all emails. If they chose the all emails option then they would not get any more emails from TE.

DIGITAL MARKETING (EMAILS, CAMPAIGNS, VIDEOS AND SOCIAL MEDIA)

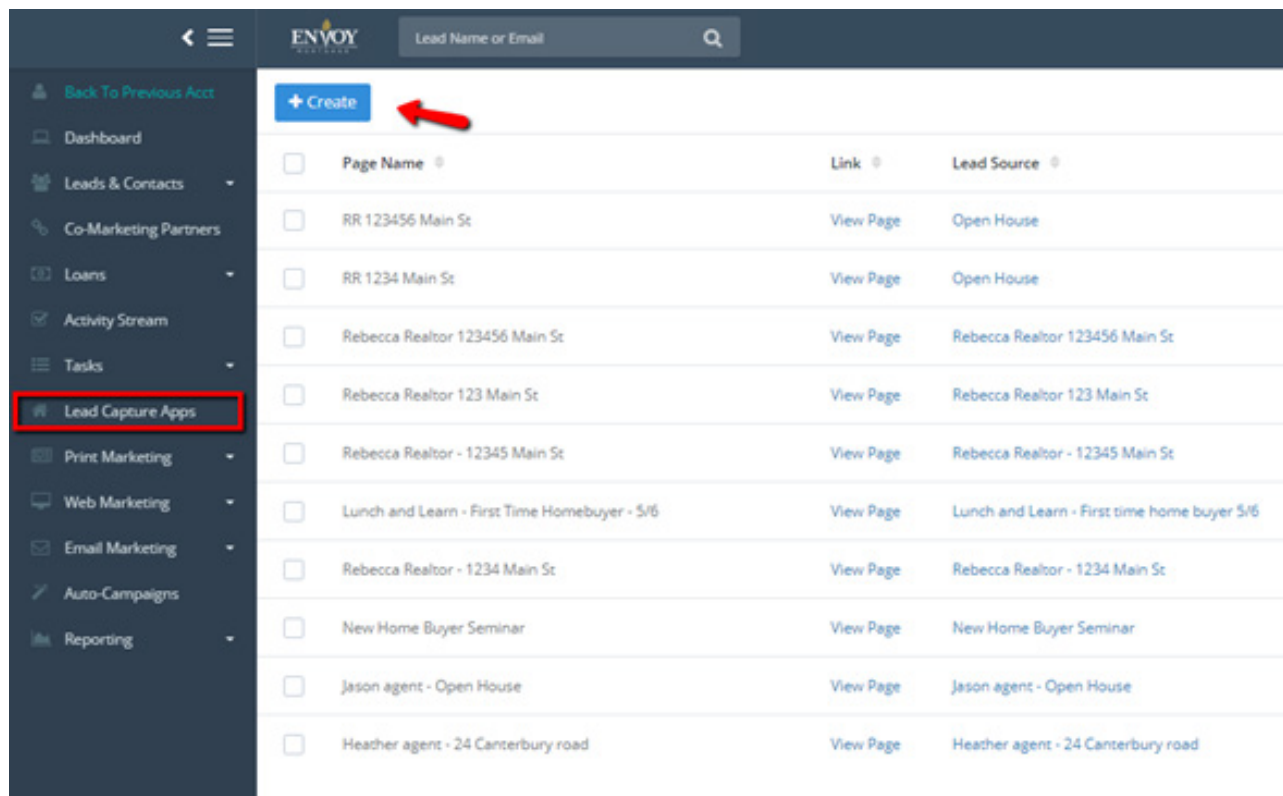
12. How do I view scheduled and posted social media posts?

- Underneath Social Media there is an option to see the currently posted items and scheduled items for the future. This is under the Create New and Saved options.

13. What is a lead capture app?

- Lead Capture Apps are online web pages with contact forms that allow you to electronically gather lead information. These can be used at open houses and other events.

- You can access Lead Capture Apps, you will login and go to the 'Lead Capture Apps' tab and click the blue 'Create' button in the left corner of the page.



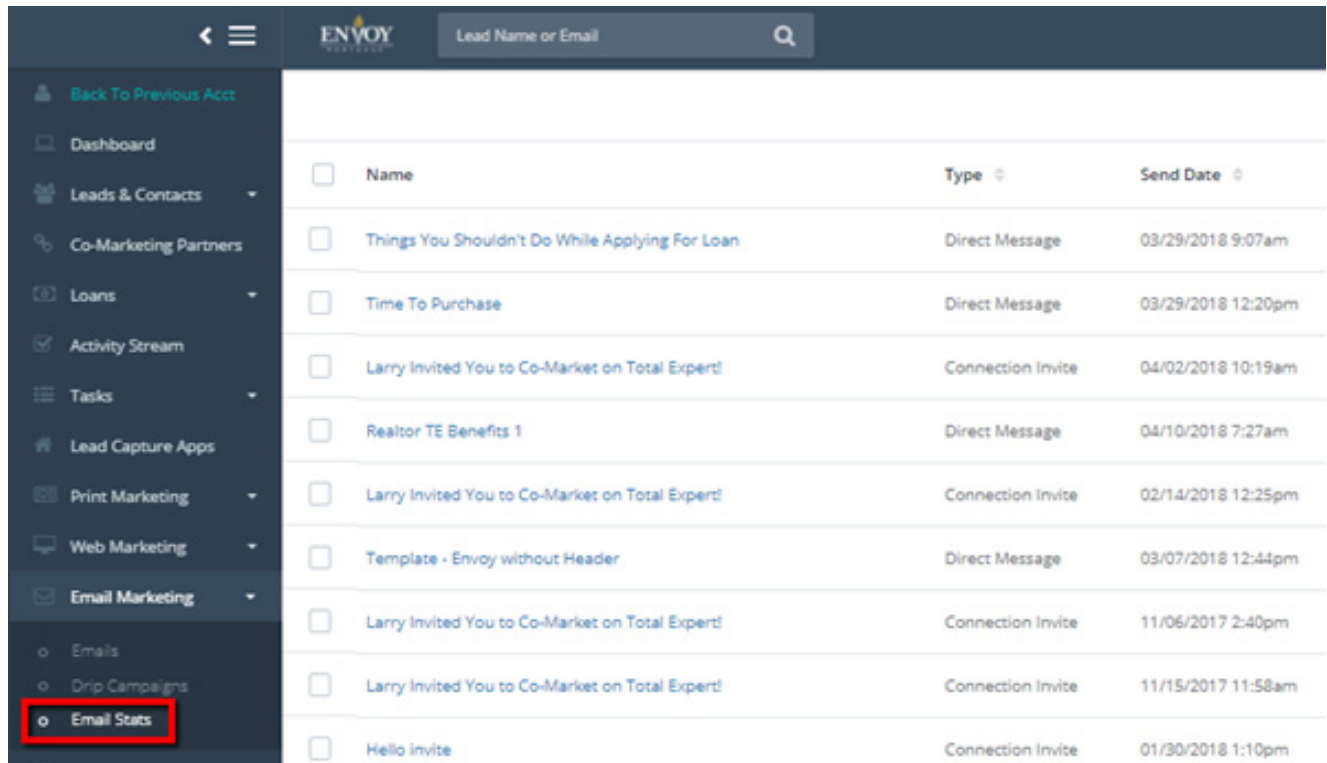
The screenshot shows the ENVOY REALTY dashboard. The sidebar on the left contains various navigation options, with 'Lead Capture Apps' highlighted by a red box. The main content area displays a table of lead capture apps. At the top of this area, a blue '+ Create' button is highlighted with a red arrow.

<input type="checkbox"/>	Page Name	Link	Lead Source
<input type="checkbox"/>	RR 123456 Main St	View Page	Open House
<input type="checkbox"/>	RR 1234 Main St	View Page	Open House
<input type="checkbox"/>	Rebecca Realtor 123456 Main St	View Page	Rebecca Realtor 123456 Main St
<input type="checkbox"/>	Rebecca Realtor 123 Main St	View Page	Rebecca Realtor 123 Main St
<input type="checkbox"/>	Rebecca Realtor - 12345 Main St	View Page	Rebecca Realtor - 12345 Main St
<input type="checkbox"/>	Lunch and Learn - First Time Homebuyer - 5/6	View Page	Lunch and Learn - First time home buyer 5/6
<input type="checkbox"/>	Rebecca Realtor - 1234 Main St	View Page	Rebecca Realtor - 1234 Main St
<input type="checkbox"/>	New Home Buyer Seminar	View Page	New Home Buyer Seminar
<input type="checkbox"/>	Jason agent - Open House	View Page	Jason agent - Open House
<input type="checkbox"/>	Heather agent - 24 Canterbury road	View Page	Heather agent - 24 Canterbury road

REPORTING

1. Where can I review email reporting?

- Email statistics are viewable by going to Email Marketing > Email Stats on the left side navigation.



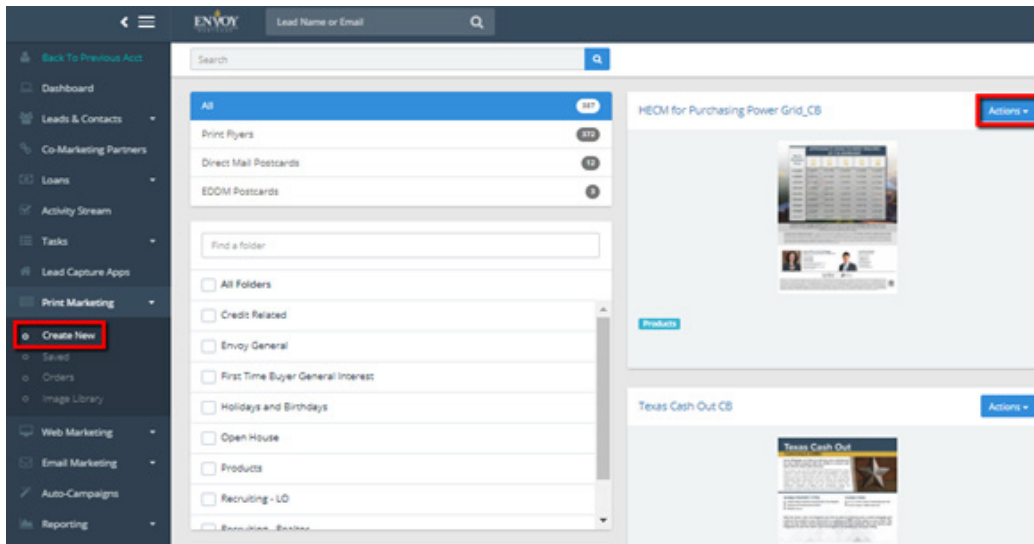
The screenshot shows the ENVOY CRM interface. On the left, a dark navigation sidebar contains several menu items. Under the 'Email Marketing' category, the 'Email Stats' option is highlighted with a red rectangular box. The main content area displays a table of email messages with columns for Name, Type, and Send Date.

<input type="checkbox"/>	Name	Type	Send Date
<input type="checkbox"/>	Things You Shouldn't Do While Applying For Loan	Direct Message	03/29/2018 9:07am
<input type="checkbox"/>	Time To Purchase	Direct Message	03/29/2018 12:20pm
<input type="checkbox"/>	Larry Invited You to Co-Market on Total Expert!	Connection Invite	04/02/2018 10:19am
<input type="checkbox"/>	Realtor TE Benefits 1	Direct Message	04/10/2018 7:27am
<input type="checkbox"/>	Larry Invited You to Co-Market on Total Expert!	Connection Invite	02/14/2018 12:25pm
<input type="checkbox"/>	Template - Envoy without Header	Direct Message	03/07/2018 12:44pm
<input type="checkbox"/>	Larry Invited You to Co-Market on Total Expert!	Connection Invite	11/06/2017 2:40pm
<input type="checkbox"/>	Larry Invited You to Co-Market on Total Expert!	Connection Invite	11/15/2017 11:58am
<input type="checkbox"/>	Hello invite	Connection Invite	01/30/2018 1:10pm

PRINT MARKETING (FLYERS, POSTCARDS)

1. How do I access the flyer library?

- Click on 'Print Marketing' -> 'Create New'. All the flyers shown in that section are available for use. Choose the flyer you would like to use by going to 'Actions' -> 'Select'.

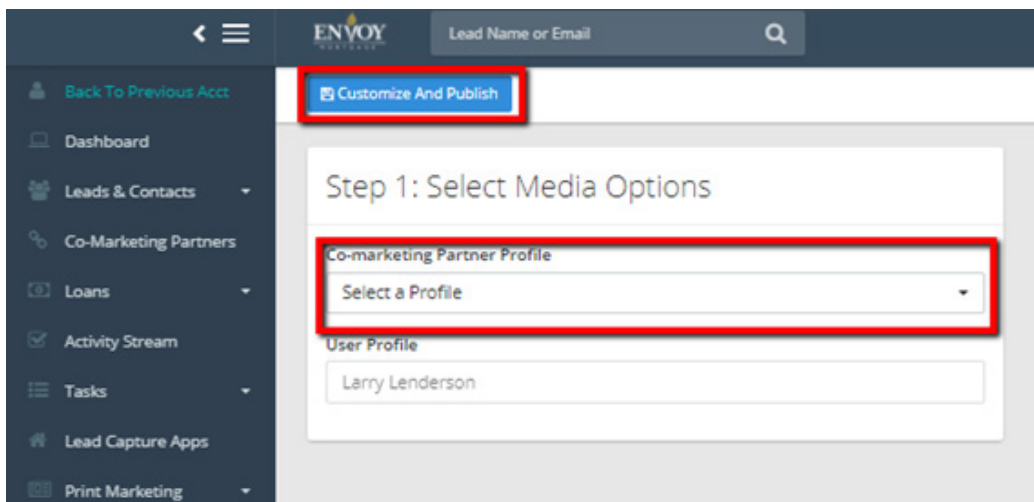


2. Why are there two versions for every flyer?

- Each flyer has two versions: one for single branding that will be used if only you want to be included on the piece and the other for co-branding and if you want to include a business partner on the piece.

3. How do I add co-branding to a flyer?

- Once you select the flyer, in Step 1 you will choose your co-marketing partner. After you choose your co-marketing partner, you will click 'Customize and Publish'. Only co-marketing flyers will allow you to add a co-marketing partner. Be sure to choose one with the designated CB at the end of the name. Only business partners who have opted in will be able to be added to a co-branded flyer.



PRINT MARKETING (FLYERS, POSTCARDS)

4. How much will I be charged for postcards?

- Each postcard costs \$0.50 per 4x6 card. For additional postcard charges, please reach out to Total Expert.

5. How many postcards are sent out to closed clients?

- Our post-close postcard campaign sends out 15 postcards over the course of 3 years once a borrower has closed their loan with us. (You can view these in the "Auto-Campaigns" category)

6. Will my post-closing postcards be co-branded with the buying agent?

- No, for the automated post-closing postcards sent to your closed clients, only the Loan Originator will be displayed on the campaign pieces.

TRAININGS

1. How do I register for Total Expert trainings?

- You can register for Total Expert trainings by going to EDGE -> Calendar -> Trainings. Find the training date that fits your schedule and register by clicking the orange register button.

My Dashboard / Calendar / Total Expert Training

Total Expert Training

April 24 @ 11:00 am - 12:00 pm

Join us for our Total Expert training! In this training, you will learn the basics of using your Total Expert account. Some of the items you will learn are:

- how to send out your first email
- how to co-brand with your referral partners
- uploading your contacts
- creating groups
- and much more!

Don't miss out!

REGISTER NOW!

April 2018

M	T	W	T	F	S	S
		28				1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

WED
18

April 18 @ 2:00 pm - 3:00 pm

2. How often are trainings being held?

- The Total Expert trainings will be available through Envoy University. Additional training opportunities are available through Total Expert.

3. If I need additional training, where can I go?

- If you are new and seeking training for the first time, please visit Envoy University. For all other additional training videos, login to Total Expert and click Resources in the top right corner, then "Help Videos." Also, you can view all trainings we have hosted on Envoy EDGE.

MISC.

1. I don't see my usual print, digital or email marketing materials?

- A prioritized listing of assets has been released and new materials will continue to be added on an ongoing basis. The latest emails and flyers can be found at the top of their respective libraries.

OTHER TOOLS AND RESOURCES

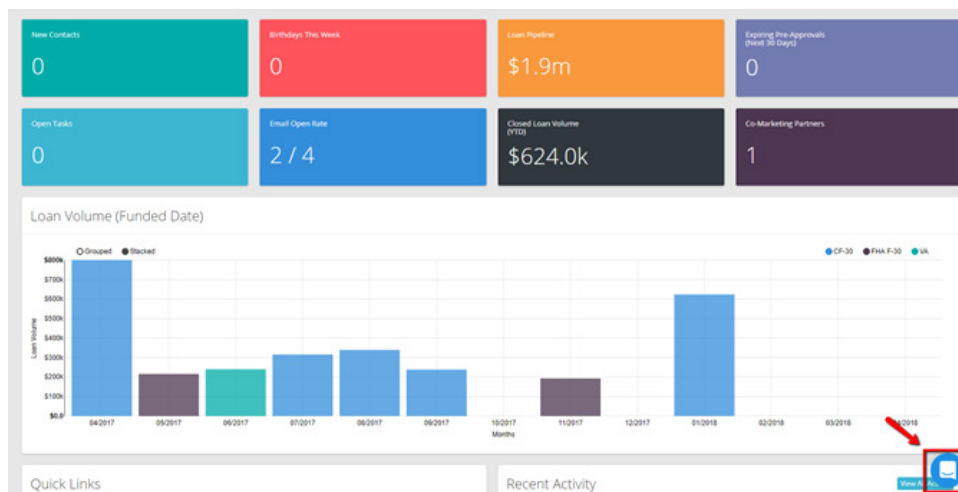
1. Where are my Opportunity Alerts?

- Currently, Total Expert does not offer Opportunity Alerts, however, they are working on notification alerts on the Agent side. When a connected agent lists a home for sale on the MLS, the Loan Originator will be provided a notification.

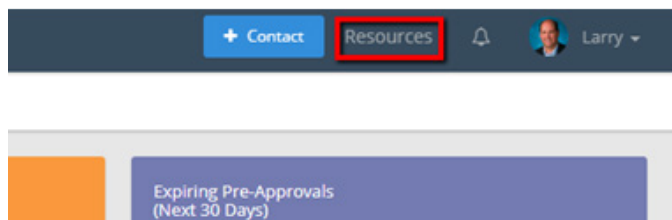
ADDITIONAL SUPPORT

1. I need additional help or support.

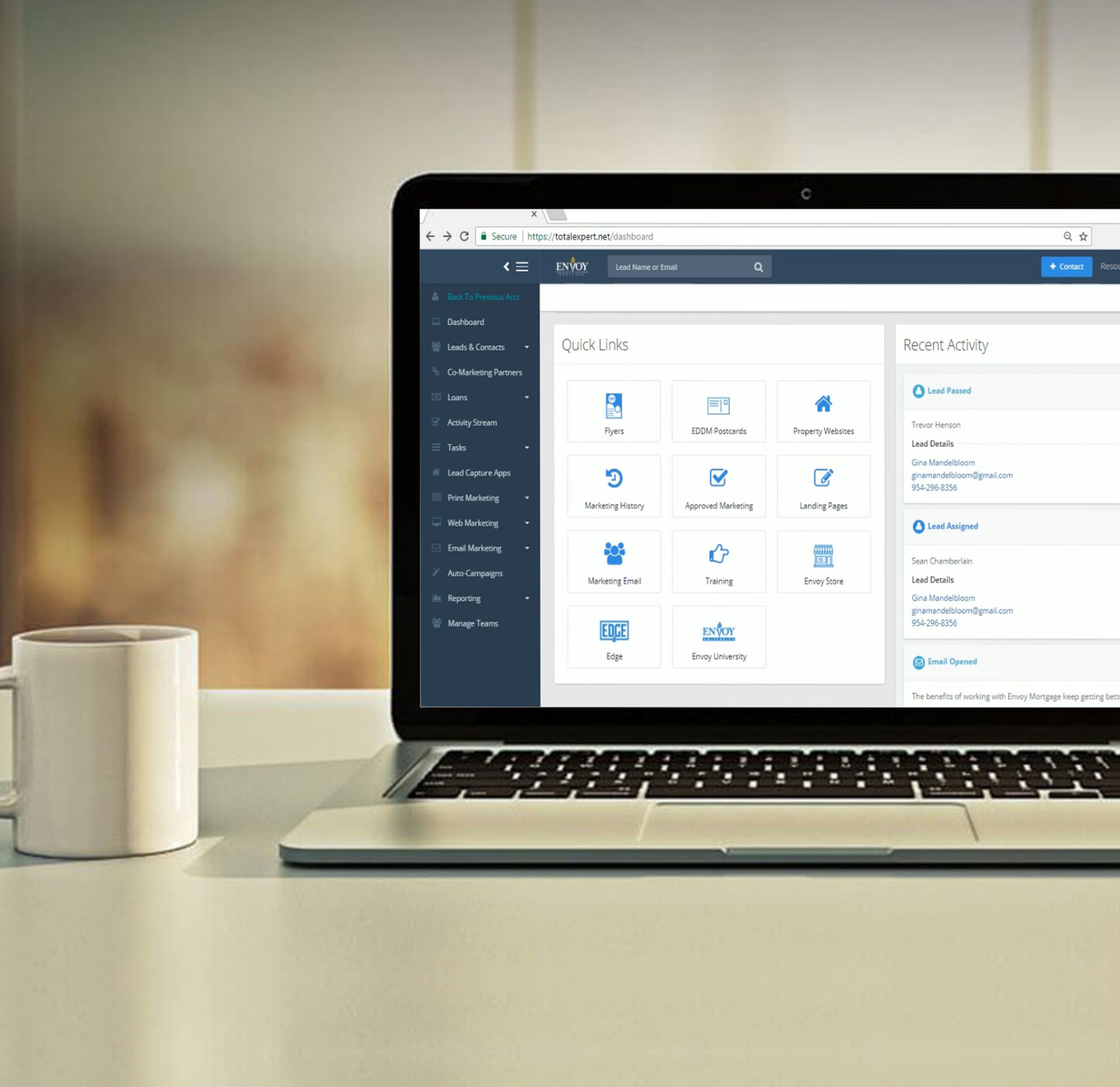
- You can connect with Total Expert support by clicking on the chat bubble in the lower right corner of the Total Expert screen.



- There are additional guides and videos in the “Resources” section next to your name in the upper right of the Total Expert screen.



- Total Expert support is available from 8am-7pm CST Monday-Friday and 9am-5pm CST on Saturday.
- For questions surrounding email or flyer content, customizations and more, email marketing@envoymortgage.com.
- For questions specific to your data, borrower milestones, in-process updates, discrepancies and more, email branchsupport@envoymortgage.com.
- For data upload questions, email support@totalexpertinc.com.



Envoy Mortgage, Ltd (2018) | All applications are subject to credit approval. Program terms and conditions are subject to change without notice. Some products may not be available in all states. Other restrictions and limitations may apply. This is not a commitment to lend. Envoy Mortgage, Ltd NMLS # 6666 | www.nmlsconsumeraccess.org | www.envoymortgage.com | www.envoymortgage.com/licensing-and-legal-information

