



# Loan Anniversary – Video

The Loan Anniversary – Video journey is a scaled-back version of the Post Close journey. It sends a Home Anniversary video email to a borrower (and co-borrower, if applicable) on the first 4 anniversaries of the completion of their loan.

## Available Loan Anniversary – Video Journey Options

- Loan Anniversary – Video

## How Do You Get This Journey Ready?

- Define the “on ramp”.
  - This journey is based on a successfully funded loan. Depending on your LOS, it will be based on either a change in the loan’s status or its funded date. Select the appropriate option and remove the other trigger from the journey.
- Define a success path (the “off ramps”).
  - The contact will leave the journey if the contact starts a new loan or unsubscribes from future emails.
- Review the content of each email template to ensure that the messages you send out align with your organization’s messaging.
  - Preview the email templates included in each journey. You can play a video by clicking the video thumbnail.
- Review the user notifications.
  - If you would like to keep the user notifications, update them after the Email Unsubscribed trigger.
  - If you do not want to use these user notifications, feel free to delete them.
- Update journey statuses to reflect what you would like to see in reporting.
  - The default journey status names follow the formula `name of the Journey + loan status`.
  - Journey statuses are used to see how many contacts have made it through each phase of the journey.