



Post Close – Home Anniversary – Purchase

A post close journey in Total Expert is used to email a contact and agents after a purchase loan is successfully funded. Depending on your integrated LOS, it is triggered by either a loan status change or a loan date. Once triggered, this journey waits 1 week, then sends an email requesting a review to the borrower and co-borrower. At the same time, it sends thank you emails to both the buyer's agent and the seller's agent. After 6 months, it creates a user notification to check whether the borrower may be interested in refinancing. Finally, 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 Post Close – Home Anniversary – Purchase Journey Options

- Post Close – Home Anniversary – Purchase

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 6-month delay, the 4-year anniversary email, and 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.
- Update the thank you email template to include a post close survey link.
 - Include `{{sender.post_close_survey_url}}` in the email template to make use of the post close survey URL option, which should be defined in each LO's account settings.