Product Release Fall 2023 – Release Notes
Revision Date: November 1, 2023

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Other Resources

- Please visit the [TE User Knowledge Base] for additional resources

Details

Platform Enhancements

Audience: All customers

Why it matters:
Continuously improving and optimizing existing features, based on customer feedback and ideas, is a critical component to providing sales and marketing teams with the tools they need to succeed.

What it does:
To boost sales productivity, we added several improvements to the platform. See list of descriptions below.

How to enable:
These enhancements and additions are components of existing Total Expert features and have been enabled in customer environments.

Enhancement Descriptions

- **Journey Stats**
    - Users can now see data on each Journey including Number of Contacts and Conversion Data.
- **Lead data in content**
    - Users can insert data from lead records into content templates using placeholders. This is like the existing use of data from contact records.
- **Filtering users by status**
    - Admin users can filter their organization's user list according to Active/Inactive status.
- **Filtering when adding users to teams**
    - Admin users can use filters to focus the user list when creating or editing teams.
- **Inactive users not shown when switching accounts**
    - By default, users do not see inactive users in their organization in the Switch Account list. This filter can be toggled on and off.
- **Deleting import mapping templates**
    - Users can delete existing field mapping templates in the data importer.
- **Equity enrichment data in content management**
    - Users can add equity enrichment data from a contact's details to dynamic content, such as email templates.
- **Equity enrichment data in journey conditions**
    - Users can use equity enrichment data from a contact's details to perform conditional checks in journeys.
- **OK to call field added to contact details**

    - Users can see whether a contact has requested not to be contacted in their communication preferences. Calling links are disabled for contacts who have asked not to be contacted.
- **Limit the number of leads a user can claim from claimable leads**
    - Users setting up a claimable leads queue can choose to limit the number of leads a given user can claim from that queue in a configurable period of time. If a user reaches the limit, they cannot claim more until the period expires.
- **Agent access to YouTube training videos**
    - Agent users can access a Quick Links item pointing to a YouTube playlist of TE tutorial videos.
- **Fields added to contact list**
    - Users can view the Memos and Contact ID fields as columns on the contact list.
- **Check inquiry estimated counts for empty address information**
    - Users see more accurate audience size estimates in the credit inquiry setup. Records with empty address fields are no longer included in the estimate.
- **Post videos to social media**
    - Users can post videos saved to the TE platform as .mp4 files across their integrated social media accounts.

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Customer Intelligence

Audience: Customers using Customer Intelligence

Customer Intelligence Credit Improvement – Controlled Availability*

Why it matters:
Credit alerts show lenders when a borrower reaches a credit threshold that could qualify them to borrow when they had been denied previously due to a low credit rating. With credit improvement, lenders are alerted when a monitored contact reaches their qualifying threshold so they can reach out and earn the borrower's business.

What it does:
Credit Improvement gives lenders the ability to monitor contacts with a poor credit score and receive alerts when they achieve a minimum credit score threshold for lending.

How to enable:
For more information on accessing and enabling credit improvement alerts, contact your Customer Success Manager. It’s available only to Customer Intelligence customers.

Additional cost associated: Included in the Customer Intelligence premium package add-on.

Dependency: Customer Intelligence required for this offering and DirectMailers relationship required for additional services.

Dependency: Controlled availability

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Advanced Lead Management

Audience: Advanced lead management (ALM) customers (formerly consumer direct)

Custom Fields on a Lead

Why it matters:
Custom fields make it possible for each customer to use the Total Expert platform in a way that makes the best sense for their unique use cases.

What it does:
Lead records can now have custom fields similar to those on contact records. Each lead record has the same set of custom fields as the contact record, but each lead record can have its own unique values in those fields.

How to enable:
Customers using Advanced Lead Management are automatically granted access to this feature.

Contacted Date Optionality

Why it matters:
Leads are best contacted with appropriate messaging as early as possible. When an assigned lead goes uncontacted or receives only token or automated attention, that could represent a missed opportunity.

What it does:
When setting up lead routing in the workflow engine, a user can determine how long a user has to contact a lead before that lead is re-distributed. Additionally, the user can now select which types of contact made through the Total Expert platform (outbound call, manual email, automated email, or manual SMS message) qualify the assignee to keep the lead.

How to enable:
Customers using Advanced Lead Management are automatically granted access to this feature.

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Analytics & Reporting

Audience: Customers using Dashboard Analytics

Dashboard Analytics – Controlled Availability*

Why it matters:
Customers often have need to query the data their organization generates through routine use of the Total Expert platform. Standard reports available in the platform are not widely customizable and may not include the most recent data. Custom reports generated through support requests are not available immediately.

What it does:
Dashboard analytics allow users to customize reporting dashboards on demand, including preferred time frames. Dashboards can be exported as a whole, or individual widgets can be

exported as needed. Current data models include email activity, mortgage loan data, insight events, and insight attribution data.

How to enable:
For more information on accessing and enabling dashboard analytics, contact your Customer Success Manager.

Dependency: Controlled availability

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Integrations

Audience: All customers

Encompass Multi-Connection Support

Why it matters:
Organizations using Encompass have a great deal of data stored there. That data might correspond to different use cases that Total Expert can fulfill, but those use cases would require separate data push configurations.

What it does:
Multi-connection allows users of the Total Expert-Encompass integration to configure multiple concurrent field mapping connections in Encompass to pass data to different instances or user teams in Total Expert.

How to enable:
Users of the Total Expert utility are automatically granted access to set up multiple connections if they so choose.

Additional cost associated: Implementation costs.

Salesforce

Why it matters:
Total Expert for Salesforce provides existing Salesforce customers with all the tools Total Expert has to offer including a lending-specific content library of compliant print and social assets, co-marketing tools, marketing automation, real-time customer insights, and more. This seamless integration boosts loan officer efficiency and production—leading to higher loan volumes and increased Salesforce adoption rates.

What it does:
Total Expert for Salesforce integration allows customers to send their contact, lead, loan, and account data from Salesforce to Total Expert, while also seeing engagement and insight data from Total Expert directly within Salesforce. Additionally, Salesforce users will have the opportunity to access their marketing content library directly within Salesforce through an inline frame (iframe) in the Total Expert interface.

With our 2023 Fall Platform Release, Total Expert has focused on enhancing the field mapping experience so that fields can be mapped multiple times providing users with more control of the data they have in Salesforce and where it goes in Total Expert. Also, there is now no limit on the number of custom fields supported in the Salesforce App.

How to enable:
The Total Expert for Salesforce Application is now available. The application is compatible with any Salesforce Cloud (Sales Cloud, Financial Services Cloud, etc.) but has only been tested on Sales Cloud and Financial Services Cloud. Our integration requires Enterprise and Lightning experience. Please contact your Customer Success Manager or visit the Salesforce AppExchange listing to learn more about this powerful application.

Additional cost associated: Monthly licensing cost for the application and third-party relationship with Salesforce.

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TrustStar

Why it matters:
Strong co-marketing partnerships provide great value to both loan officers and real estate agents. TrustStar provides Total Expert users with an interactive and personalized way to capture information about real estate agents and agencies, empowering them to create necessary partnerships to fuel their pipelines.

What it does:
Total Expert users can use TrustStar to locate real estate agents according to metrics that indicate a potentially valuable relationship, then import their data into Total Expert as a contact. From there, they can initiate a co-marketing relationship and make use of all of Total Expert's co-marketing tools.

How to enable:
Create an account with TrustStar. From the menu in your TrustStar account, select Integrations and follow the prompts to connect your Total Expert account.

Optimal Blue

Why it matters:
Rate flyers are a valuable way to summarize potential lending scenarios. Being able to specify precise scenarios enhances flexibility when building these flyers and improves value to your potential customers.

What it does:
Users can now query Optimal Blue with highly customizable loan parameters to populate rate flyers with the most up-to-date information available. Organizations can define standard queries for common loan products, and individual users can select these or build their own custom queries when building a flyer.

Organizations with existing rate flyer templates built in Total Expert can continue using them with the updated Optimal Blue search experience.

How to enable:
Create an account with Optimal Blue. From the settings menu in your Total Expert account, select Integration Settings and follow the prompts to connect your Total Expert account. Users who are already integrated automatically have access to the updated experience.

Additional cost associated: Optimal Blue account subscription.

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