Product Release Fall 2024 – Release Notes

Revision Date: November 11, 2024

Summary

Platform Enhancements

- Increased maximum file upload size for user profile pictures and logos to 5 MB

SMS/Mobile

- Sending windows
- Deprovisioning numbers
- Segment usage reporting
- Enhanced opt-in message
- Remember Me feature for mobile login

Data Importer

- Recurring import error and skip handling

Analytics & Reporting

- Self-service reporting — user activity

Integrations

- Empower LOS
- RETR
- Experience.com (enhancement)

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 this improvement to the platform. See description below.

How to enable:
This is an enhancement of an existing Total Expert feature and has been enabled in customer environments.

Enhancement Description
- **Increased maximum file upload size for user profile pictures and logos to 5 MB**
  - Users now have the flexibility to use a higher-resolution image when uploading a profile headshot, company logo, or team logo.

Back to top

SMS
Audience: Customers using SMS messaging

Sending Windows

Why it matters:
Legal requirements prohibit automated marketing messages outside ordinary waking hours. Failure to observe this practice could alienate potential customers in addition to carrying penalties.

What it does:
Automated messages (sent by journeys or campaigns, including opt-in requests) and bulk messages are only delivered inside your organization's configured sending window. When these messages are triggered outside a sending window, they are held until the next window opens, then delivered.

This restriction does not apply to messages sent directly from a TE user to a single contact.

How to enable:
A default sending window is set for you via organization settings. For more information on configuring this window, contact your Customer Success Manager.

Back to top

Deprovisioning Numbers

Why it matters:
Users no longer with your organization do not need a phone number provisioned for their account, accruing causing wasteful charges.

What it does:
Administrators can remove the provisioned number for an inactive user so the number can be returned to circulation and their organization is not charged.

How to enable:
This feature is enabled for users with access to the Phone Management page.

Back to top

Segment Usage Reporting

Why it matters:
Administrator users want to monitor how much SMS activity is going out on behalf of their organization to ensure they are receiving maximum value from the feature.

What it does:
Administrators can review the usage volume of message segments (typically 1–3 per message) to evaluate the value their organization is receiving from messaging.

How to enable:
This feature will be enabled for users with access to the Phone Management page by 11/27.

[Back to top](#)

Enhanced Opt-In Message

Why it matters:
Boilerplate opt-in messages sent by SMS can be viewed skeptically by consumers due to high rates of spam, leading to low acceptance rates. More personalized messages are more likely to be accepted.

What it does:
Users can set up a custom message that is sent on their behalf when requesting to have a contact opt in to receiving SMS messages.

How to enable:
For more information on configuring your message, contact your Customer Success Manager.

[Back to top](#)

Remember Me Feature for Mobile Login

Why it matters:
Users want to log in to the app as quickly as possible to maximize their efficiency.

What it does:
Users can opt to have the app remember and automatically enter their email address on the mobile app login screen on their device.

How to enable:
This feature is enabled for users with access to the Total Expert mobile app.

[Back to top](#)

Data Importer
Audience: Customers using the data importer tool

Recurring Import Error and Skip Handling

Why it matters:
Users with recurring imports want better visibility into the specifics of each import job run according to the recurring rule.

What it does:
Users can review the details of recurring import jobs, including the error reports so they can review any skipped records and the field mapping used each time.

How to enable:
This feature is enabled for users with access to the importer tool.

Back to top

Analytics & Reporting
Audience: Customers using analytics dashboards

Self-Service Reporting — User Activity

Why it matters:
Total Expert users frequently request reports of their data from customer support. Requested reports typically take multiple business days to compile and return, making it difficult to be responsive to data trends.

What it does:
Users can create their own reports—on demand—in the platform to make timely conclusions from their data. This set includes the following commonly requested reports:

- User activity
- Emails sent per user
- Integration activations per user

How to enable:
These reports are available to users with access to the analytics feature.

Back to top

Integrations
Audience: All customers

Empower LOS

Why it matters:
Empower users want to make use of their data in conjunction with Total Expert's marketing tools.

What it does:
Users can import LOS data from Empower to trigger automation and nurture relationships.

How to enable:
Customers must have an Empower relationship.

Additional cost associated: Additional license and implementation costs for Empower.

RETR

Why it matters:
Loan officers want to expand their reach and find suitable real estate agents they could work with, then bring that information into Total Expert for seamless co-marketing.

What it does:
Users can identify real estate agents and import their public information into Total Expert as contact records to start building co-marketing relationships with those agents.

How to enable:
Customers must have a RETR relationship.

Additional cost associated: Additional license and implementation costs for RETR.

Experience.com (Enhancement)

Why it matters:
Users of the Experience.com–Total Expert integration want to ensure that their data is fully synced between both platforms.

What it does:
Experience.com integration users can use TE's outbound data connector (ODC) to sync their data. Users can also add their survey URL to a custom field in TE so it can be used in TE templates.

How to enable:
Customers must have an Experience.com relationship.

Additional cost associated: Additional license and implementation costs for Experience.com.