

March Product Updates

March 11, 2026

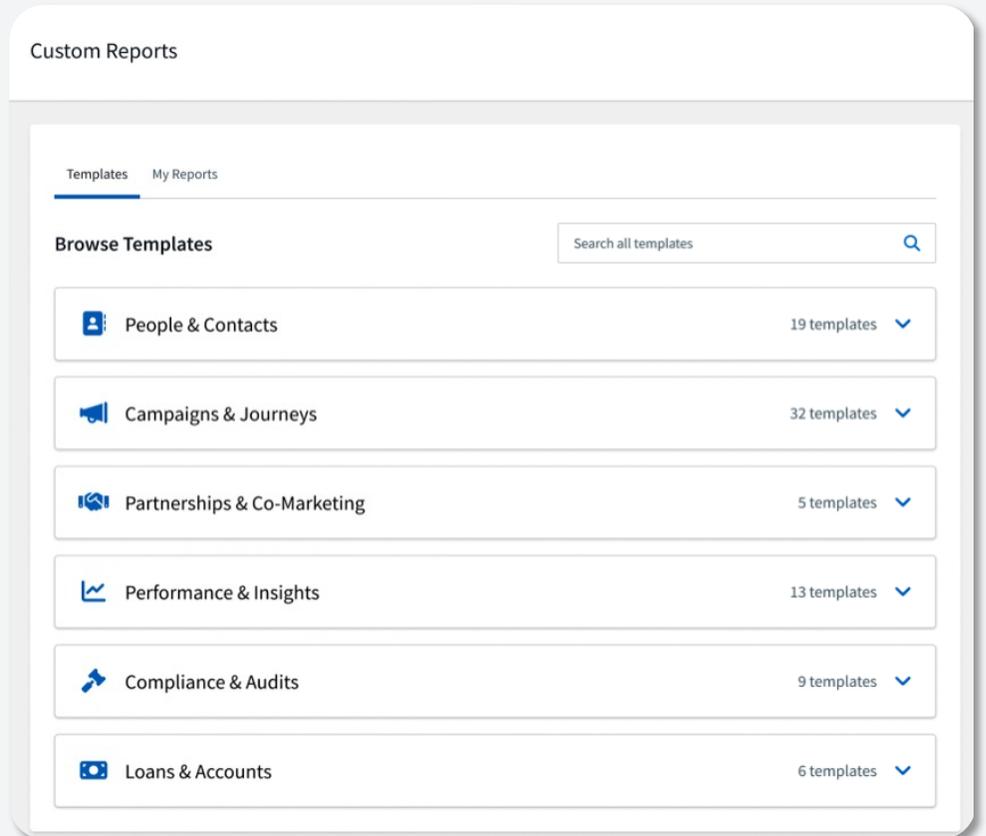


Data/Analytics

Reporting Center

Introduced in February, Reporting Center is now Generally Available for all admins. No more waiting on report requests, Reporting Center improves admin visibility and enables data-driven planning with direct, self-service access to the data that matters most.

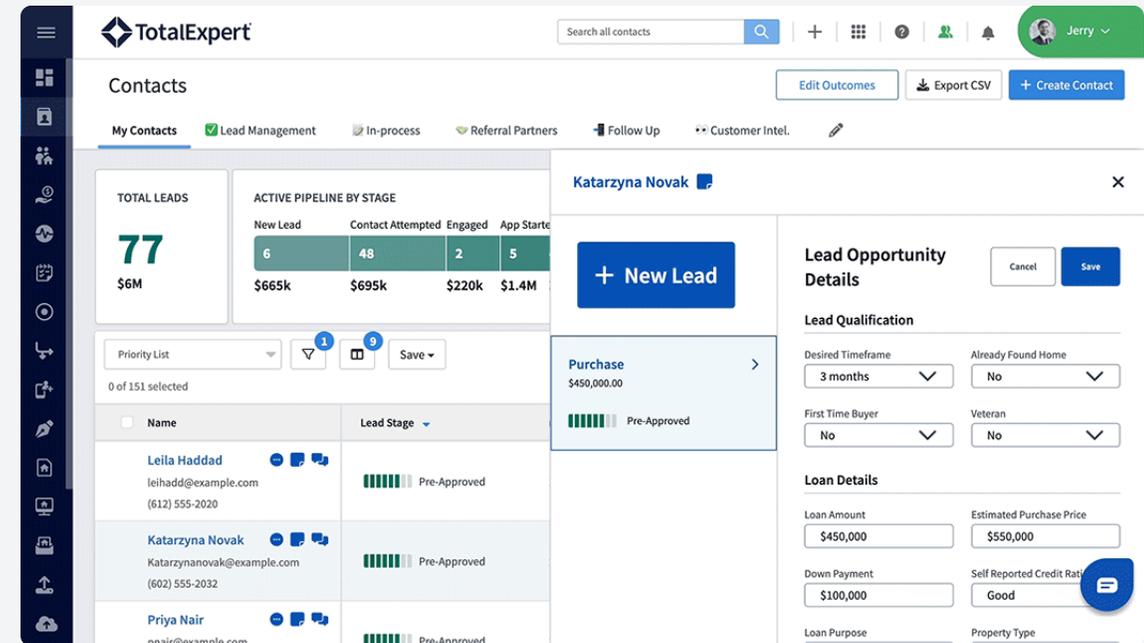
- **Improved user experience:** A more intuitive interface makes it easier for admins to find, run, and act on reports without additional support.
- **Direct access to key reports** covering audits, journeys, and contact data, all in one place, without submitting a request.



Sales Center

Lead Management Updates

- **External API for lead aggregation:** Bring leads in from any source through a standardized API to centralize opportunities directly into Total Expert.
- **Flyout Panel:** Opens from Pipeline Views to surface all lead opportunities for a contact without navigating away, with real-time updates after any action.
- **Send from lead assignee:** Email and SMS communications can now send from the loan officer assigned to a lead rather than the contact owner.
- **Routing policy updates:** New State License Matching filter restricts lead assignment to users licensed in the property's state, supporting compliant, predictable routing.
- **Additional updates** can be viewed in the **March Release Notes**.



Generally Available

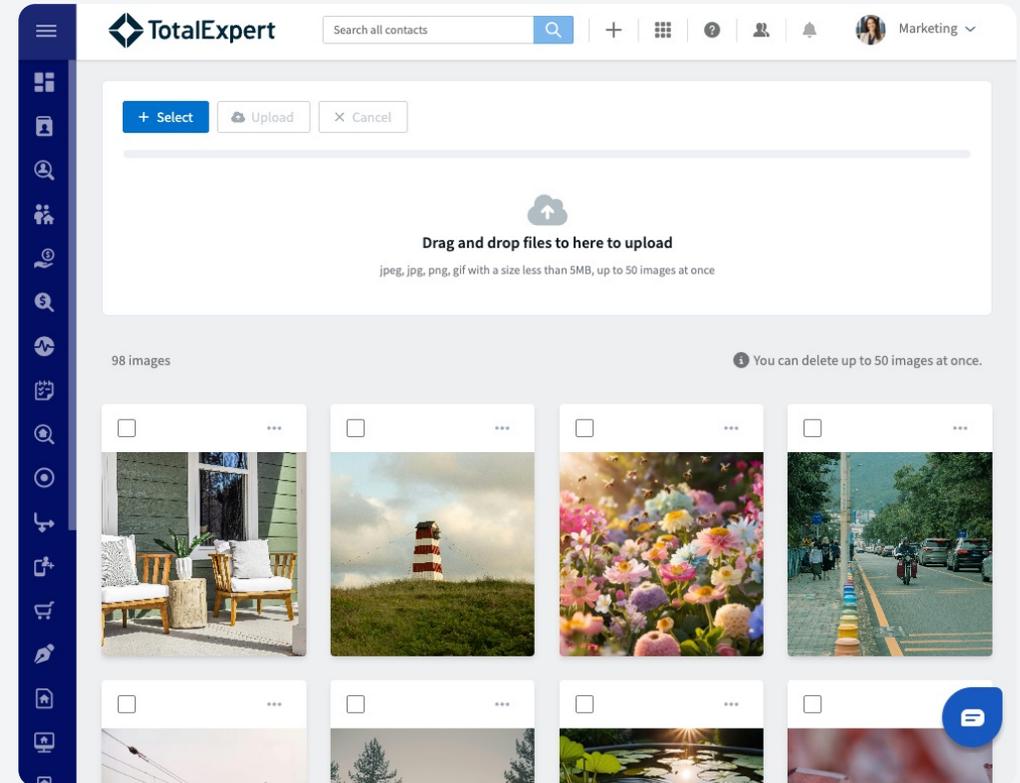
Lead Management

Content Management

Global & User Image Library

These updates eliminate common friction points for marketing admins and improve asset management efficiency,

- **Bulk upload:** Upload 1–50 images per batch, significantly reducing the time spent adding new assets to the library.
- **Bulk delete:** Remove multiple images at once, making it easier to keep the library clean and current.
- **Drag-and-drop upload support:** A more intuitive upload experience that fits naturally into existing workflows.
- **Clear validation and error messaging:** Immediate, actionable feedback when uploads don't meet requirements, reducing confusion and retry loops.

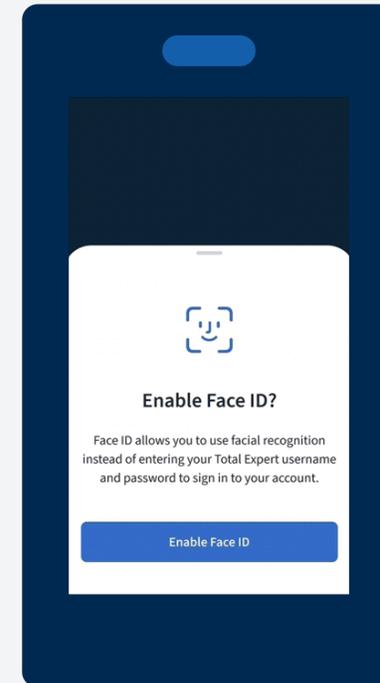


Login Security

Mobile Authentication Updates

These updates will provide users with a smoother sign-in experience while giving organizations greater control over session management and security.

- **Remember Me stores email address:** Balances convenience with security by remembering a user's email address without storing credentials.
- **Biometric support for SSO users:** SSO-enabled organizations can now offer Face ID and Touch ID as login options, reducing friction for daily users.
- **Session timeout managed via org setting:** Admins can configure session duration at the organization level, giving security teams the control they need.
- **Password lockout:** For clients not using SSO, accounts will be locked out after multiple failed login attempts, preventing brute-force attacks on the mobile app.

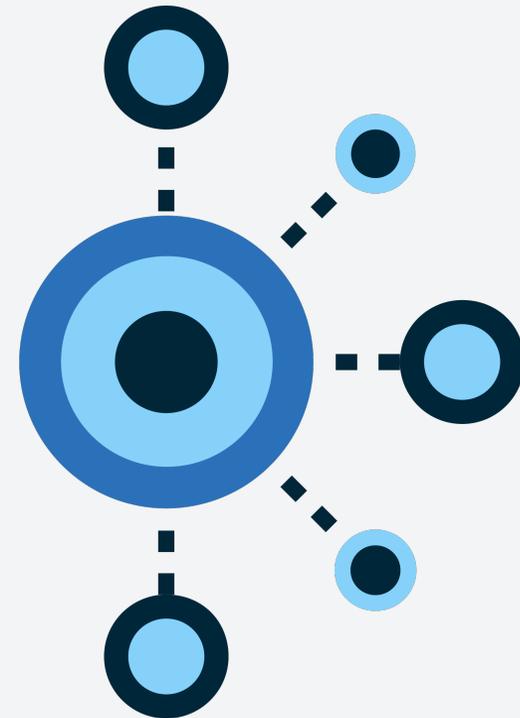


Integrations

Outbound Data Connector Enhancements

These enhancements improve visibility, usability, and reliability for users relying on ODCs in their day-to-day workflows.

- Loan ODC activity will appear in the primary borrower's contact activity feed.
- Users with view and write access will be able to review ODC configuration without turning it off.
- Contact and loan ODCs can be initiated directly from the multi-select action menu on contact and loan records.
- A running history of ODC actions: which ODC fired, what was sent, and the outcome will be available.



Expert Content

New Journeys

- **EPN Journey for Covered:** Triggers upon loan creation and delivers personalized insurance quotes based on loan purpose and property type, helping borrowers explore home insurance early.
- **CI: EPO Risk Mitigation Journey:** Monitors for Customer Intelligence Rate or Credit Inquiry signals after a loan is funded and notifies the contact owner when early payoff risk is detected.
- **Servicing Sold:** Automatically silences communications to borrowers when their loan servicing has been transferred to another organization.

