Product Release Spring 2023 – Release Notes

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Platform Enhancements

Audience: All Customers

Reporting and Analytics (Controlled Availability)

Why it matters:

Total Expert users can visualize and analyze the impact of marketing and sales activities to determine future opportunities for growth within their organization. Reporting and Analytics enable users to access detailed, organization-specific dashboards to help measure campaign performance and loan production.

What it does:

Reporting and Analytics provides Marketing Admins with self-service capabilities to access, visualize, modify, and share dashboards throughout their organization. Dashboards in the Controlled Availability release include Monthly Campaign Performance, Mortgage Loan Production Overview, and Mortgage Loans Demographics.

How to Enable:

At this time, only Marketing Admins within the Controlled Availability (CA) program can access the dashboard feature. Total Expert will add organizations in waves of 3-4, every 2-3 weeks. Customers interested in this feature will engage through your Customer Success Manager, who will submit a request for scheduling their CA release. System performance will be closely monitored, and additional enhancements completed as we gradually onboard more organizations.

Platform Optimizations

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 for users, we improved the navigation between individual records and saved contact lists, enabled editing outcomes on Focused Views, and added created dates to Insights so you can easily determine recency and relevance.

How to Enable:

These enhancements are for existing Total Expert features and have been made available within customer environments with these features already enabled. Enhancement descriptions:

- **Navigating from a saved list back to contact lists (Sales Productivity)**
    - Users can more easily leverage saved/filtered lists as call lists and can navigate to an individual record and then back to that saved list using the back arrow on a contact list.
- **Saved user lists on the all-contact view (Sales Productivity)**
    - Users can create saved lists on the all-contacts view. This creates efficiency for coming back to common filtering criteria and the ability to work lists as a group without the need to spoof into other user accounts.

- **Editing outcomes on Focus View* (Sales Productivity)**
  - Users with access to Focused View Builder and Call Queue Builder can click the Edit Outcomes button at the top of those pages to add and edit outcomes. When a user creates a new outcome, it is added to the bottom of the Outcomes list in both the Focused View Builder and the Call Queue Builder.
- **Create date added to insight display (Sales Productivity)**
  - For users leveraging Insights, the created date is now visible on an Insight within the Insight banner on a contact record. This allows users to understand the recency/relevance of the insight.
- **Customized SMS sending windows (Campaigns)**
  - To meet specific organizational needs, your Customer Success Manager can help you customize the availability of SMS messaging time windows. These time windows can be configured to match business hours better.
- **MLS Listings Insights for only most recent primary residence (Customer Intelligence)**
  - When an address shows up on an MLS feed with an active status, meaning the property is on the market, Total Expert compares that address with the address in the contact record and addresses associated with any closed or funded loans stored in the system. If a match is found, Total Expert then checks whether the address is the primary residence. Learn more.

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Recruiting View on Contact Details

Why it Matters:
Maximizing loan officer recruiting efforts is critical. Recruiting managers need to capture key pieces of data on loan officers as well as the tools and capabilities to collaborate with the hiring managers for loan officer recruiting in the same system that those hiring managers use every day.

What it Does:
Total Expert supports capturing data on the contact details that a recruiter or branch manager might need to evaluate the qualifications of that candidate, and the recruiter can utilize assignment functionality built within Total Expert to collaborate on recruits with other users.

How to Enable:
Customers leveraging Total Expert of loan officer recruiting will now have access to the recruiting module via the new contact details experience. The configuration of the recruiting module can be activated by contacting your Customer Success Manager.

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Insight History on Contact Details

Why it Matters:
Acting on insights instead of instincts enables lenders to respond to customer needs quickly and effectively. Having the insight history on the contact details allows a loan officer to assess the recency and relevance of the insight and prioritize the opportunity to serve the customer.

What it Does:
Users with access to Insights can see an Insights tab in the main section of the details page (below the banner showing the most recent insight). This tab lists all the insights that have been generated for the contact; each entry includes the insight's name, description, and date of creation.

How to Enable:
This feature will be automatically enabled for existing Customer Intelligence customers and users with Insights access. For questions on how to access and leverage, contact your Customer Success Manager.

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Customer Intelligence

Audience: All Customers

Customer Intelligence Rate Alert

Why it Matters:
Total Expert combines your contact database with intent data, including credit triggers and home equity as well as proven best practices and intelligent automation to drive more funded loans. The Rate Alert helps you identify the perfect time to help customers who can benefit from a change in interest rates. Rate Alerts notify users when a customer or prospect could benefit from a current interest rate.

What it Does:
Rate Alert uncovers refinance opportunities within your existing database and creates a rate alert if a monitored contact's current interest rate is higher than the available market rates by an established threshold. Users can:

- Select which contacts to monitor
- Compare the borrower's current rate with market rates from Optimal Blue
- Set thresholds to define if a refi is advantageous to the contact

How to Enable:
For more information on accessing and enabling Rate 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.

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Advanced Lead Management

Audience: Advanced Lead Management (ALM) Customers (formerly Consumer Direct)

SMS Platform Notifications

Why it Matters:
Loan Officers prefer to communicate with leads quickly and via their preferred channels. With time and speed of response critical to lead engagement, SMS Platform Notifications enables Loan Officers to receive SMS notifications, read messages and respond efficiently.

What it Does:
An ALM user logged in to Total Expert who receives an SMS message can see a notification in the header, regardless of where they are in the platform. They can then quickly read the message and access the associated lead record, where they can see all communication with the lead, including the full SMS conversation, and respond immediately.

How to Enable:
This feature will be automatically enabled for existing ALM users. If you are interested in this capability, contact your Customer Success Manager.

Lead to Voicemail

Why it Matters:
Loan Officers (LO) often receive calls or call-backs from multiple leads. In the event an LO cannot take a call, the caller needs the ability to leave a voicemail. Being notified of those calls, accessing voicemails, and responding promptly is an important aspect of relationship management.

What it Does:
If an ALM user is unable to answer a call or call back from a lead, the caller can leave a voicemail. The platform creates a notification for the user and ties the voicemail recording to the associated lead record. Users have the option of using a default outgoing message provided by Total Expert or recording a custom message in the platform.

How to Enable:
This feature will be automatically enabled for existing ALM users. If you are interested in this capability, contact your Customer Success Manager.

Zillow (Integration)

Why it Matters:
Capturing leads through Zillow and being able to route them effectively and efficiently enables Loan Officers to engage those leads quickly.

What it Does:
This updated version of Total Expert's integration with Zillow allows users to capture leads through that service in a more secure way than the former email parsing method. When an organization purchase leads from Zillow, those leads are sent to the organization in Total Expert, where they are distributed to end users.

How to Enable:

This integration requires a separate Zillow Mortgage Account before completing the integration in Total Expert and implemented for use at an organizational level. For questions on how to access and leverage, contact your Customer Success Manager.

Additional Cost Associated: 3rd party license with Zillow required.

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Integrations

Audience: All customers

Encompass Next Generation

Why it Matters:
Encompass is an integral Loan Origination System partner across the mortgage industry. Connecting the details of what's being captured in the LOS with Total Expert will help organizations deliver a better customer experience.

What it Does:
The Encompass Next Generation Integration allows customers to sync contact and loan data and receive real-time updates from Encompass to seamlessly trigger workflows and marketing automation. This solution is now API enabled, giving you no-code, self-service capabilities to control field mapping for any Contact or Loan fields available in Total Expert's API, including custom fields, loan fields (type, status, program, etc.), and participants (borrower, co-borrower, etc.). There are preset defaults configured for users of the utility, but they may customize any that they wish.

How to Enable:
A mutual client of Encompass, Total Expert, and KensieMae who wants to use this integration will take the first step in working with your CSM to execute a Statement of Work to grant Kensie Mae/Encompass access to your Total Expert instance. An implementation manager will be assigned to complete the creation of API credentials, ODC template configuration (if Push to Encompass is required). Otherwise, this integration provides customers with a no-code, self-service solution that puts the data controls in your hands.

The next generation of the Encompass integration is now available for mutual Encompass, Total Expert, and KensieMae customers. Please reach out to your Customer Success Manager to learn more.

Additional Cost Associated: Implementation plus licensing costs, 3rd party relationships with Encompass and Kensie Mae.

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Total Expert for Salesforce

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

What it Does:
The Total Expert for Salesforce Application 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 by iFraming in the Total Expert interface.

The app 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 app requires Enterprise and Lightning experience.

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 app 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, 3rd party relationship with Salesforce.

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Instagram

Why it Matters:
Loan Officers can engage with new or existing Instagram followers and maximize their brand awareness and the reach of their marketing materials.

What it Does:
Total Expert's integration with Instagram enables users to link their professional account with Total Expert to post content and marketing collateral directly from the platform. Users will then be able to track the performance of those social media posts to maximize success.

How to Enable:
Total Expert's integration with Instagram enhances and works with the existing Facebook integration under the banner of their parent company, Meta. Users must set up their own social media accounts. Total Expert does not provide these.

To be able to post to Instagram from Total Expert:

- The Instagram account must be set up as a professional account.
  - A personal or creator account will not work. This is a limitation of Instagram's API.
  - A personal account can be switched to a professional account in the account settings.
- The professional Instagram account must be connected to a Facebook business page.

Please contact your Customer Success Manager if you would like to learn more.

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Lender Price

Why it Matters:
In a competitive market, being able to accurately market and pair mortgage offers with listing information is an effective differentiator for lenders.

What it Does:
The Lender Price integration allows mutual Total Expert customers to populate MLS and non-MLS rate flyers with mortgage offers provided by the Lender Price product and pricing engine (PPE).

How to Enable:
Mutual customers of Total Expert and Lender Price can utilize the integration to populate Print Flyers within Total Expert. Engage with your Customer Success Manager if you are interested.

Additional Cost Associated: Implementation and Pricing Engine Connection Fee, 3rd party license with Lender Price required.

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Capacity

Why it Matters:
Loan officers strive to efficiently close as many loans as possible while also providing top-notch customer service. They are extremely busy and want to spend time helping their borrowers and not looking for answers or searching for information across multiple systems. Rather than wasting time on this step, Capacity's chat capabilities connect loan officers with the information they need to keep borrowers informed.

What it Does:
Mutual Capacity and Total Expert customers can leverage the Total Expert skills in Capacity to perform various functions in Total Expert like viewing recent contacts, searching contacts, creating a contact, adding a note to a contact, etc. This enables users to stay within the platform they are currently in but immediately interact with Total Expert. Supported platforms include Slack, Microsoft Teams, email domains (Office 365/Gmail), and web portals like company intranets.

How to Enable:
The Total Expert integration with Capacity is created and maintained by Capacity AI. When the customer activates the skill in their instance of Capacity, the user may then initiate by providing their Total Expert username and password to authorize Capacity to interact with Total Expert APIs. Please contact your Capacity admin or Customer Success Manager if you need help with the connection.

Additional Cost Associated: 3rd party license with Capacity.

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Milestones

Why it Matters:
Building relationships is expensive for lenders and not always easy to maintain for consumers. As a homeowner management platform, Milestones keeps borrowers connected to their lending team with a personalized portal for communications and a home ownership hub for ongoing education, collaboration, and home management.

What it Does:
Provides customers with customer prospecting and retention tools by providing an interface to shop for a home and manage a home post close. The integration allows lenders to pull their TE contacts into Milestones to invite them to a hub to close more business and manage the relationship over the life of their homeownership journey.

How to Enable:
Customers can integrate their Total Expert users, contacts, and loan details directly in their Milestones platform by requesting Milestones access from their Customer Success Manager or Technical Account Manager.

Additional Cost Associated: Implementation, 3rd party Milestones license is required.

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