Product Release Spring 2024 – Release Notes
Revision Date: May 20, 2024

Summary

Platform Enhancements
- Added user's NMLS to Home Valuation lead capture app.
- Lead capture app registrations for existing contacts now filterable.
- Leads API now supports PATCH to update custom fields.
- Clarified text in lead importer.
- Improved Communications tab in contact records
- Leads navigation option moved up a level.
- Optimal Blue searches now support custom fields and AUS.

Customer Intelligence
- Customer intelligence credit inquiry daily enrollment
- Customer intelligence credit improvement

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- Pipeline views.

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- Dashboard-level access rights

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- Birdeye
- Loanzify
- NewZip
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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 Description

- **Added user's NMLS to Home Valuation lead capture app**
  - Users who create a lead capture app using the Home Valuation template now have their NMLS information (imported from their account profile) displayed. This improves compliance with NMLS display requirements.
- **Lead capture app registrations for existing contacts now filterable**
  - Users can now filter their contact list according to lead capture responses regardless of when the contact was created.
- **Leads API now supports PATCH to update custom fields**
  - Total Expert's API can now be used to edit an existing value in a custom field on a lead record.
- **Clarified text in lead importer**
  - The text directing users setting up an import has been improved to make it clearer how imported leads should be distributed.
- **Improved Communications tab in contact records**
  - The Communications tab only displays Office365 emails for users with the integration. The tab has been renamed to Office365 and hidden for users who do not use the integration.
- **Leads navigation option moved up a level**
  - The option for Leads has been moved from the Lead Management submenu to the Leads & Contacts parent menu to simplify navigation.
- **Optimal Blue searches now support custom fields and AUS**
  - Users can now specify an Automated Underwriting System for each loan type. Optimal Blue custom fields can be set in the admin page and passed with your OB search.

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Customer Intelligence

Audience: Customers using customer intelligence

Customer Intelligence Credit Improvement

Why it matters:
34% of mortgage denials are due to a poor credit score. Credit Improvement alerts help customers monitor those contacts who were previously denied a loan and will notify loan officers once their contact has improved their credit score enough to qualify for a mortgage.

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CRM

Audience: Customers using the contact list to organize contacts

Pipeline Views

Why it matters:
Administrators want to set priorities and surface the contacts deemed to be most valuable for their users based on those priorities. Users want easy access to the contacts they should be working with so they can spend more time working with them and less time finding them.

What it does:
Administrators can define criteria for custom views on the contact list and publish those defined views to all users or specified teams. Users with access to these views see their own contact list segmented according to the view's rules, and they can define their own views. Users can also easily switch between the standard view, published admin views, and their custom views.

How to enable:
Pipeline Views will enable for all users with access to the contact lists. **System/Marketin Admins will have a two-week grace period for activation and building preferred views before all users get access.**

Activation Timing: Pipeline Views will be activated for System/Marketing Admins on 5/21/24 - with a two-week delay for all other users. All users will be activated on 6/5/24.

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Integrations

Audience: All customers

Birdeye

Why it matters:
Users want to be able to survey their customers and capture the responses for appropriate follow-ups.

What it does:
Users can create a survey in Birdeye and retrieve a unique link to that survey for each of their Total Expert contacts. They can then send those links to their contacts using Total Expert's email or SMS tools. When the survey responses are captured in Birdeye, they are automatically imported to the Total Expert contact record as survey responses, which can themselves trigger further activity.

How to enable:
Customers must have a Newzip relationship.

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

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Loanzify

Why it matters:
Loanzify is a point-of-sale (POS) platform that allows mortgage lenders to provide their customers with an easy-to-use, online, digital application. This application allows the consumer to seamlessly deliver their personal, co-borrower, income, asset, and other information that will be used to qualify them for a mortgage.

What it does:
The Loanzify integration allows mutual customers to capture application updates directly on the TE contact record, enhancing efficiency and reducing barriers to completion.

How to enable:
Customers must have a Newzip relationship.

Additional cost associated: Additional license and implementation costs for Loanzify apply.

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NewZip

Why it matters:
Loan officers want to be as valuable a resource to prospective borrowers as they can by helping connect them with real estate agents and staying in touch with everyone to ensure that things keep moving forward.

What it does:
Loan officers can refer their loan prospects who have not yet connected with a real estate agent to NewZip, which will assign them a concierge who can help find an appropriate agent. NewZip then passes information back to Total Expert about the concierge and agent, and this can be used to trigger relevant journeys.

How to enable:
Customers must have a Newzip relationship.

Additional cost associated: Additional license and implementation costs for Newzip apply.

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Additional Variable Fields in FOC Templates

Why it matters:
Users want more control over the exact wording presented on materials that are automatically provided to their customers and prospects.

What it does:
Some FOC templates now contain more fields that can accept preferred text, such as *pre-qualified* instead of *pre-approved*.

How to enable:
All FOC templates are enabled for all users with access to the feature.

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