

Product Release Summer 2024 – Release Notes

Revision Date: August 20, 2024

Summary

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- Image library user experience (UX) improvements

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- Ingenius (enhancement)
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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 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

- **Image library user experience (UX) improvements**
 - The global image library and user image library now have a more intuitive and organized appearance and options to view and delete saved images.

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Customer Intelligence

Audience: Customers using customer intelligence

Life Events

Why it matters:

Consumers' financial needs change over time, especially at common milestones, such as getting married or having a baby. Users want to be responsive to their contacts' needs with timely, relevant messaging.

What it does:

Life events automatically detect when your contacts experience significant milestones. For each detected event, an insight is added to the relevant contact record, which can be used to trigger automation. In addition, any collected information is recorded for that contact so that records can be sorted, filtered, and used with other tools, such as contact lists.

How to enable:

For more information on accessing and enabling life events, contact your Customer Success Manager.

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Credit Inquiry Daily Enrollment

Why it matters:

Credit inquiries represent big opportunities for lenders, but these opportunities are very time-sensitive. Having to wait as much as a month to enroll contacts in monitoring for this activity represents significant missed opportunities.

What it does:

Monitoring for credit inquiries can now be routed through Experian, which allows users to submit enrollment of new contacts for monitoring every day, rather than only once per month.

How to enable:

For more information on accessing and enabling daily credit inquiry enrollment, contact your Customer Success Manager.

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Email

Audience: Customers using auto campaigns to send emails

Email Cancellation Enhancements

Why it matters:

Auto campaigns are often set up to send emails well ahead of time, and the messaging could become stale or errors could be discovered in the meantime. Users want to ensure that they send only correct information to their contacts.

What it does:

Users can now cancel emails scheduled by an auto campaign up until 15 minutes before they are routed for delivery.

How to enable:

Auto campaign email cancellation is enabled for all users with access to auto campaigns.

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Analytics & Reporting

Audience: Customers using analytics dashboards

Customer Intelligence Monitored Contacts by Month Dashboard

Why it matters:

Users want to know whether their efforts to monitor contacts are effective or whether they should attempt to adjust their strategy to derive the most value.

What it does:

Users of Total Expert analytics and customer intelligence can see how many contacts were monitored in the previous month for credit inquiry, credit, and rate alerts. This information is presented along with the number of alerts generated to give a sense of value derived from their marketing strategy.

How to enable:

This dashboard is available to organizations leveraging Customer Intelligence for users with access to the analytics feature.

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Self-Service Email Reporting

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 first set includes the following commonly requested reports:

- Email statistics
- Aggregated email statistics at the user level

- Aggregated email statistics at the email template level

How to enable:

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

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Integrations

Audience: All customers

Salesforce 3.9

Why it matters:

When a provider uses multiple platforms to communicate with their customers, it can be difficult to keep their opt-in/opt-out choices stored in each platform consistent, making it difficult to honor those choices.

What it does:

Users can now share their contacts' opt-in/opt-out preferences between their Total Expert and Salesforce accounts to better ensure legal compliance.

How to enable:

Customers must have a Salesforce relationship.

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

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Adwerx (Enhancement)

Why it matters:

Adwerx users want to streamline the process of creating branded advertising in their account by having their profile information populated automatically.

What it does:

In addition to data from contact records, a user's profile information, such as contact information and profile image, is now shared from their Total Expert account to their Adwerx account to populate that profile and use it in digital advertising generated there.

How to enable:

Customers must have an Adwerx relationship.

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

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Evocalize

Why it matters:

Evocalize users want to maximize the effectiveness of their digital advertising by taking advantage of data from their existing contacts to direct their efforts and by immediately directing responses to communication channels.

What it does:

Users can send contact data to Evocalize to generate audiences for digital advertising created there. Interest generated by Evocalize ads can be shared back to Total Expert to create contact or lead records.

How to enable:

Customers must have an Evocalize relationship.

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

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Ingenius (Enhancement)

Why it matters:

Loan officers who move to a new organization often encounter difficulty collecting and importing the loan data they need to continue working with their past customers.

What it does:

Users onboarding to a new Total Expert account can collect public loan data and import it so that they can immediately continue communicating with people they have worked with on previous loans.

How to enable:

Customers must have an Ingenius relationship.

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

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Epic (Applied Systems)

Why it matters:

Insurance users have a wealth of coverage, carrier, and other information about the policies they manage, and they want to use that data to create and send relevant marketing efficiently.

What it does:

Users can import agency management system (AMS) data from Epic to their Total Expert account so they can create and execute timely marketing based on that information.

How to enable:

Customers must have an Epic relationship.

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

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