Product Release Winter 2024 – Release Notes

Revision Date: February 12, 2024

Summary

Platform Enhancements

- Fields added to contact list filters
- Fields added to lead workflow engine filter
- Fields added to contact details page
- Increased character limit for LinkedIn posts
- Increased maximum upload size of .mp4 videos

Customer Intelligence

- Customer intelligence life events – controlled availability*

Advanced Lead Management

- Preservation of contact ownership during lead routing

Analytics & Reporting

- User activity data model and dashboards

Integrations

- Advanced Lead Capture
- Salesforce Feature Management
- DirectMailers Marketplace

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 Descriptions

- **Fields added to contact list filters**
    - Users can select the Debt-to-Income and Lead Capture App Responses fields as filters on the contact list.
- **Fields added to lead workflow engine filter**
    - Users can select Property State and Property ZIP Code fields as filters in the workflow engine.
- **Fields added to contact details page**
    - Users can view and edit the Close Date and List Date fields on the contact details page.
- **Increased character limit for LinkedIn posts**
    - Users can now create LinkedIn posts using Total Expert up to the LinkedIn limit of 3000 characters. The previous limit when creating a LinkedIn post in Total Expert was 700 characters.
- **Increased maximum upload size of .mp4 videos**
    - Users can now upload .mp4 videos to be shared on social media up to a maximum of 250 MB. The previous limit was 25 MB.

Back to top

Customer Intelligence

Audience: Customers using Customer Intelligence

Customer Intelligence Life Events – Controlled Availability*

Why it matters:
Significant life events for a person, such as a marriage or turning 65, often correlate with changes to their financial needs. Automated alerts for common events can help users move quickly to take advantage of opportunities.

What it does:
Customer Intelligence users can now enroll to receive alerts based on the following life events for their contacts:

New Parent	Occupation Change
New Marriage	Turning 25
New Divorce	Turning 26
New Homeowner	Turning 59
New Mover	Turning 62
Education Change	Turning 65

As with other alerts, inclusion and exclusion rules can be used to determine a subset of contacts to monitor.

How to enable:
Life Events are currently released as a controlled availability for select users. If you have an interest or would like more information, contact your Customer Success Manager.

Additional cost associated: life events contact monitoring.

Dependency: Customer Intelligence required for this offering

Dependency: Controlled availability

Back to top

Advanced Lead Management

Audience: Advanced lead management (ALM) customers (formerly consumer direct)

Preservation of Contact Ownership During Lead Routing

Why it matters:
Retail lenders want to retain full ownership of their relationships with their contacts. Marketing administrators want to market to a potential customer based on all available relationships.

What it does:
When creating a lead routing workflow, users now have the option to assign an incoming lead *before* checking for a matching contact record, in which case the lead would only be attached to an existing contact record that the assignee already owns, has been assigned, or has had shared with them. If the assignee does not have a matching contact, a new contact record is created for that user, even if one exists for a different user in the same organization.

The existing behavior, where the system checks for a matching contact record before distributing a lead, remains the default option.

How to enable:
For more information on accessing and enabling the preservation of contact ownership option, contact your Customer Success Manager. It's available to users leveraging Advanced Lead Management.

Back to top

Analytics & Reporting

Audience: Customers using Dashboard Analytics

User Activity Data Model and Dashboards

Why it matters:
Administrators want to monitor their users' activity in the Total Expert platform and communicate their findings so they can maximize their ROI from the platform. Requesting a custom report and waiting several days for the results prevents these users from acting responsively.

What it does:
Existing platform use data has been modeled for analytics and compiled into several standard dashboards, which can be duplicated and customized as with existing dashboards.

How to enable:
The User Activity dashboards are enabled for all users with access to dashboard analytics.

Back to top

Integrations

Audience: All customers

Advanced Lead Capture

Why it matters:
Total Expert's static lead capture pages are effective at capturing information, but only exist at custom URLs and do not show the user's branding. By connecting custom forms with users' existing branded pages, users can provide their potential customers with a seamless experience so they can be confident about where their information is going.

What it does:
Users can now build dynamic, customized forms with up-to-date personal branding and still have all the captured details routed directly into their Total Expert account.

How to enable:
For more information on accessing and enabling advanced lead capturing, contact your Customer Success Manager.

Additional cost associated: Additional license and implementation costs apply.

Back to top

DirectMailers Marketplace

Why it matters:
Total Expert users want to work with DirectMailers to create professional print templates that can be enhanced with data from their own account information and contact details, then sent to contacts at appropriate timing for marketing.

What it does:
Total Expert users can use automated (within Journeys) or manual events to customize print mail templates created with DirectMailers and have the printed pieces delivered directly to appropriate contacts. Mailed pieces reflect the user's branding and contact information, and the mail piece PDF will be shared as an activity within the Contact record.

How to enable:
For more information on accessing and enabling DirectMailers print campaigns, contact your Customer Success Manager.

Additional cost associated: Additional implementation and third-party licensing costs associated for non-CI use cases.

Back to top