Product Release Winter 2025 – Release Notes

Revision Date: February 19, 2025

Summary

Platform Enhancements

- Prevent users from including prohibited characters in disclaimer names
- Add "Expired" filter to Manage Marketing page
- Expand drop-down link options on social media settings
- Remove limits on desired price defaults
- Importer & API recognition of military addresses in State field
- Outcome columns in contact list

SMS

- Automated responses to incoming calls
- Filtering logic for push notifications

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- Most Recent Loan condition

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- Contact list slide view
- Outcomes on Contact List

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- Rate alert enrichment – settings and data display
- Rate alert enrichment – use data with product pricing engines

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- Salesforce – full participant payload for loan and account sync
- Salesforce – expanded lookup field mapping configuration

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

- **Prevent users from including prohibited characters in disclaimer names**
    - Disclaimer names cannot be saved with spaces or most special characters. This adds validation to the form for creating disclaimers to prevent unsupported characters from being added.
- **Add "Expired" filter to Manage Marketing page**
    - In addition to filtering templates by active or inactive status, users can filter the list to show only those that are past their configured expiration date.
- **Expand drop-down link options on social media settings**
    - Users can select from any of the expanded marketing profile settings when adding a link to a social media post.
- **Remove limits on desired price defaults**
    - Administrators can set default, maximum, and minimum pricing engine values that are available to end users when they are setting up a rate flyer.
- **Importer & API recognition of military addresses in State field**
    - Contact records support the use of military abbreviations, such as AE and AP, for the address in place of a state abbreviation.
- **Outcome columns in contact list**
    - Users can see the most recent outcome assigned to a contact and the date that outcome was set in sortable and filterable columns in the contact list.

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SMS

Audience: Customers using SMS messaging

Automated Responses to Incoming Calls

Why it matters:
Users do not want consumers to be frustrated at being unable to connect by calling the number they received a text from.

What it does:
Phone numbers provisioned in Total Expert for sending SMS messaging are not able to receive voice calls. If a consumer attempts to call back when they receive an SMS, they will hear an

automated message informing them why the call cannot be connected and providing an alternate number to call (if one is configured in the user's account settings).

How to enable:
Automated responses are enabled for all users with provisioned phone numbers.

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Journeys

Audience: Customers using journeys

Most Recent Loan Condition

Why it matters:
Users want to provide separate paths for a contact to follow, depending on whether or not the referenced loan is most recent, so that appropriate messaging is always provided.

What it does:
Journey administrators can create separate paths for contacts based on whether the loan that triggered them onto the journey is their most recently created loan.

How to enable:
Contact your Customer Success Manager if this condition has not been released to your organization yet.

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CRM

Audience: All customers

Contact List Slide View

Why it matters:
When users are viewing a saved list and select a contact record from that list, they want to move on promptly to successive contacts on the list when they finish their relevant work in each record.

What it does:
Users can navigate directly from one contact record to the next when working from a saved list without having to return to the list each time.

How to enable:
The Contact List Slide View is enabled for all users with access to saved contact lists.

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Outcomes on Contact Lists

Why it matters:
When users are viewing a list of Contacts or building pipeline views on which to take action, understanding what the last interaction resulted in and when that interaction took place can help focus the user on how to steer the next outreach attempt.

What it does:
Users will now be able to see the last recorded Outcome and the date that Outcome was recorded from the Contact List view.

How to enable:
Outcomes and Outcome Date will now be default columns in the Contact List for all users.

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Customer Intelligence

Audience: Customers using customer intelligence rate alerts

Rate Alert Enrichment – Settings and Data Display

Why it matters:
Users want more relevant rate comparisons to generate more helpful alerts and a more complete picture of a borrower's situation so they can quickly provide the best information possible.

What it does:
Organizations can configure baseline rates or differences for more types of loans to compare against their customers' loans. In addition, rate alerts now include more robust information that can be viewed on the contact record and contact list and referenced in journeys and email templates.

How to enable:
Rate alert enrichment is enabled for all users with access to rate alerts.

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Rate Alert Enrichment – Use Data with Product Pricing Engines

Why it matters:
Users want to seamlessly use data from their rate alerts to create custom marketing for the relevant contact via their integrated product pricing engine.

What it does:
Users can take advantage of rate alert data when making product pricing engine requests (via Optimal Blue or Polly) from the contact record. Responses can be saved to the record and used in marketing materials.

How to enable:
Rate alert enrichment will be released for rate alert users in March. Use of a product pricing engine requires an active integration with that service.

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Analytics & Reporting

Audience: Customers using analytics dashboards

Self-Service Reporting — Contacts

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 set includes the following commonly requested reports:

- Contact records created in the platform and their ownership

How to enable:
These reports are enabled for users with access to the analytics feature.

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Customer Intelligence Dashboards — Add Credit Improvement

Why it matters:
When viewing customer intelligence data on analytics dashboards, users want information about as many alerts as possible so they can understand the value they are getting.

What it does:
Credit Improvement data is now included in the Customer Intelligence Attribution and Customer Intelligence Monitored Contacts by Month dashboards.

How to enable:
These reports are enabled for users with access to the analytics feature.

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Integrations

Audience: Customers using the Salesforce integration

Salesforce – Full Participant Payload for Loan and Account Sync

Why it matters:
Users syncing loan or account data from Salesforce to Total Expert want full contact details to be brought over in the event the owner of the contact record does not also own the loan or account record.

What it does:
The full details of contact records associated with loans or accounts are now passed to Total Expert, not merely the fields required to perform deduplication against the same user's contact list, allowing a full record to be available in the appropriate user's contact list.

How to enable:
This will be enabled for all users of the Total Expert–Salesforce integration upon installation of version 5.0.

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Salesforce – Expanded Lookup Field Mapping Configuration

Why it matters:
Users syncing Salesforce objects with Total Expert entities want to ensure that data from records related to those objects are synced as well as the fields in the object itself.

What it does:
A Salesforce admin can configure related records (using lookup fields) to share all the desired field values with Total Expert in the same mapping setup.

How to enable:
This will be enabled for all users of the Total Expert–Salesforce integration upon installation of version 5.0.

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