

Production Release APR 2020 Release Notes

April 29, 2020

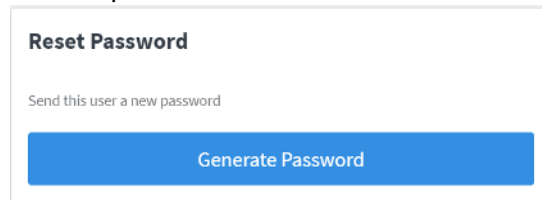
This release includes:

- *Platform*
- *Campaign Management*
- *Content Management*
- *Sales Productivity*
- *API & Integrations*

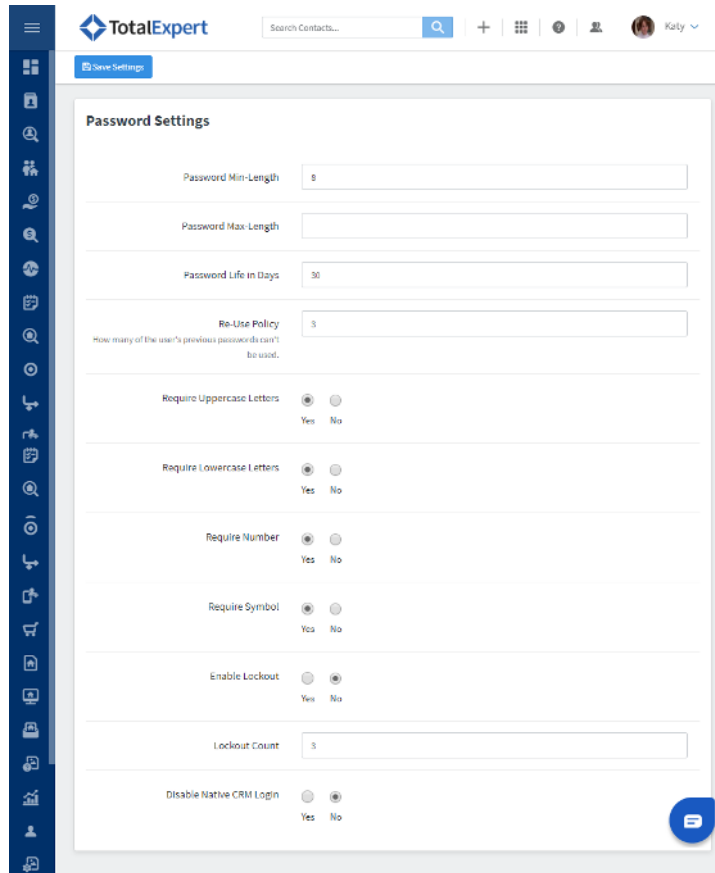
Note: We restructured the organization of enhancements by the product's core functional areas, which we call missions. Please contact your TotalExpert customer success manager with questions.

Platform

- Improved Password Management
 - Administrators will be able to send a new password from Organization - Admin - Users - Edit instead of having to reset and supply an updated password to the user outside of Total Expert



- Administrators will have improved control over the way their password policy can be enforced within Total Expert. With a new page under Organization Admin - Password Settings, administrators can define:
 - Password strength
 - Password life
 - Password reuse
 - Account lockout policy
 - Whether to disable native logins



Password Settings

Password Mini-Length: 8

Password Max Length:

Password Life in Days: 30

Re-Use Policy: 3
How many of the user's previous passwords can't be used.

Require Uppercase Letters: Yes

Require Lowercase Letters: Yes

Require Number: Yes

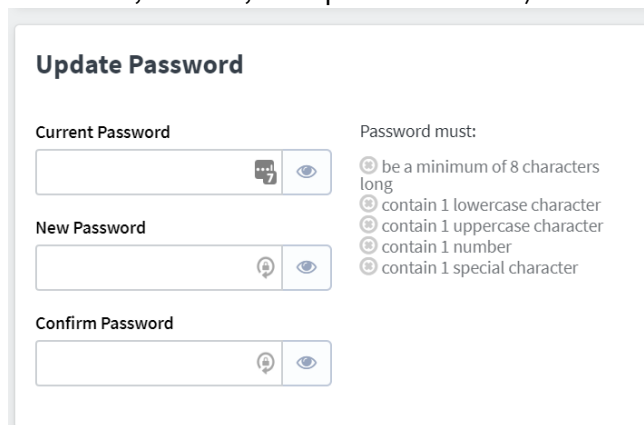
Require Symbol: Yes

Enable Lockout: No

Lockout Count: 3

Disable Native CRM Login: No

- Password strength requirements: An administrator can define the strength of the passwords users in their organization must meet to be considered a valid password
 - Character count (minimum 8 characters, no maximum)
 - Character requirements (2 of the 4 must be applied: upper case letter, lower case letter, number, and special character)



Update Password

Current Password: [input] [visibility]

New Password: [input] [visibility]

Confirm Password: [input] [visibility]

Password must:

- ⊕ be a minimum of 8 characters long
- ⊕ contain 1 lowercase character
- ⊕ contain 1 uppercase character
- ⊕ contain 1 number
- ⊕ contain 1 special character

- Password life: An administrator can define the number of days for which a password can be valid in Total Expert
 - Minimum password life is 30 days
 - Password life range is 30 days to 180 days
 - Default will be set at 30 days

- Password reuse: An administrator can define the number of previous passwords that may not be used when resetting a password (e.g. if set to 3, a user may not use their 3 immediate previous passwords)
 - Password re-use range is 1 to 30
- Account lockout policy: An administrator may choose to define whether they will lock out users who fail to log in after a certain number of attempts
 - This feature may be disabled entirely
 - If enabled, account lockout attempts may range from 1 (where 1 incorrect attempt is allowed, but an incorrect 2nd attempt will lock the user out) to 5 (where 5 incorrect attempts are allowed, but the 6th incorrect attempt will lock the user out)
 - When the user exceeds the maximum number of incorrect attempts allowed by the organization, they will be prompted to reset their password
- Whether users should be able to natively log in through Total Expert
 - When customers are using Single Sign On (SSO), they may choose to disable logins directly through TotalExpert.net so that their users may only access the platform through their SSO provider
- This feature is controlled by permission:
 - ORG Admin: Password Settings
- When accessing Account Settings, users who are attempting to update their password will be able to view the password strength requirements for their organization and see whether their new password has met those requirements
- View last login time
 - When viewing Account Settings, users can see the date they last logged in and from which IP that login occurred.

| Profile | |
|--|---|
| First Name * | <input type="text" value="Alex"/> |
| Last Name * | <input type="text" value="Thompson"/> |
| Website <small>(e.g. www.example.com)</small> | <input type="text" value="http://www.expertbank/athompson"/> |
| Company Name | <input type="text" value="Expert Bank"/> |
| Job Title | <input type="text" value="Senior Mortgage Loan Officer"/> |
| Testimonial Website <small>(e.g. www.example.com)</small> | <input type="text"/> |
| Last Login | This account was last logged in on 04/23/2020 1:42 PM from IP: 73.37.221.39 |

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- Freshchat widget hides lower arrow of the scroll bar on the Activity Stream page
 - Adjusted chat icon placement so that it does not cover scrollbars on the Activity Stream page

Campaign Management

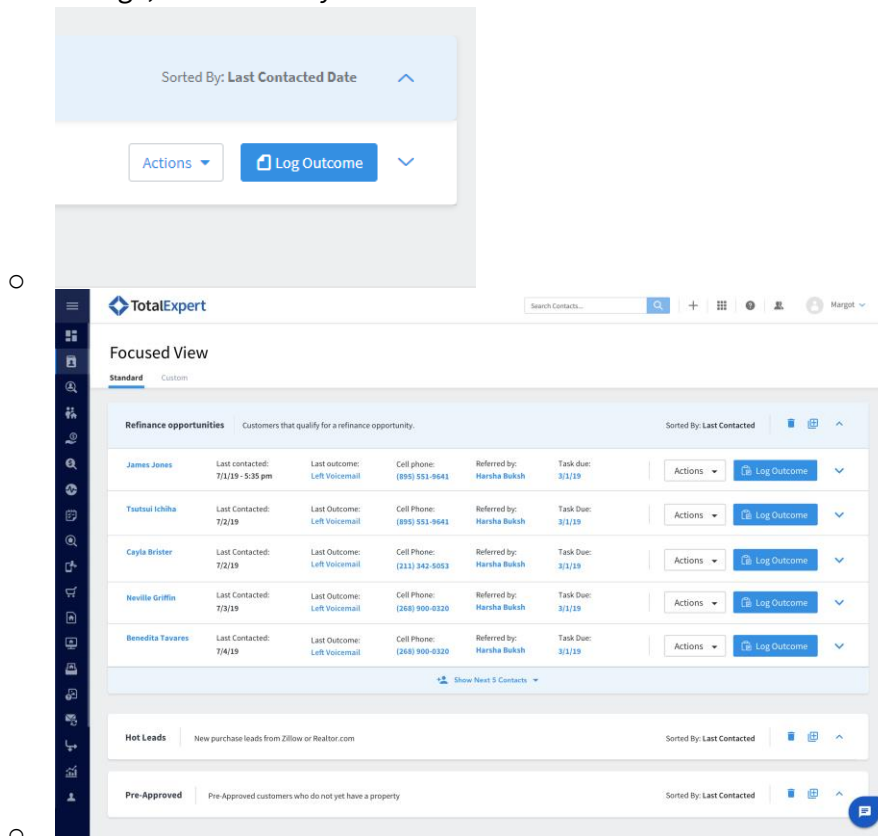
- Journeys
 - New triggers will inherit conditions of already existing triggers
 - Triggers will no longer occasionally inherit the inline conditions of another trigger when creating multiple triggers in a row while creating / editing Journeys

Content Management

- Print orders with a cost of 0.00 with auto-pay turned off are stuck in "awaiting payments" status
 - Adjusted print order process to ensure \$0 orders are correctly processed
- Print orders exceeding limits
 - Set correct print order status when a user exceeds their limits so that threshold approvers can more easily see what they need to approve
- Print Auto Campaigns generated CSVs contain
 instead of stripping
 tags
 - Adjusted .csv file generation to remove break tags for Print Auto Campaign orders
- Auto pay option doesn't set Print Order Status correctly for single-branded assets
 - Resolved issue where print pieces using auto pay were not reflected in the correct status for processing
- Print and social: Editable fields with no data in them disappear when creating asset
 - Within print and social content, empty editable fields will no longer be removed, but will remain in place and empty
- Social media video posts resulting in "Invalid Parameter"
 - Resolved issue where users were unable to successfully post select videos to Facebook through Total Expert
- Social Media Report date filter doesn't include the current date
 - When viewing the Social Media Report, selected dates within the date range are highlighted and applied to the search filters
- Cannot archive contacts from Email Stats Actions button
 - Users with permission to archive contacts will now be able to archive from the Email Stats page Actions menu
- General Merchandise orders not able to be paid for
 - Resolved issue where users who had placed General Merchandise orders could not successfully submit payment
- Co-Marketing Partner page not displaying co-branded flyers
 - When viewing a co-marketing partner's page, co-branded flyer templates that have been published between the active user and the co-marketing partner will appear in this section

Sales Productivity

- Focused View
 - We've updated the look of the actions and outcome button in Focused View to make it clear how to interact with the contacts listed in Focused View. There is no functional change; it's visual only



- Cannot share, unshare, assign, and unassign a lead on the lead update page
 - Resolved issue where users were unable to unshare contacts they own or were assigned to from the Contact Edit page
- SMS Landing Page disclaimers not recognizing “lender” liquid logic tags
 - Updated SMS opt-in landing pages to correctly display user information within placeholders
- Adjustments to custom mortgage loan participants loan list page
 - When an organization has chosen to add a loan participant that's unique to their organization, they'll now be able to see up to five of those participants within the Loan List
- The activity stream event count totals do not update to correlate to the selected date range of the activity stream
 - When filtering the Activity Stream by a specific date range, the total count displayed next to each action will adjust to reflect the total during the selected date range

API & Integrations

- MBS Highway signature image issue
 - Resolved issue where Equal Housing logo and company logo were not correctly displaying within MBS Highway Automated Marketing Kit templates
- Lead Parsing
 - Added/adjusted email lead parsing for:
 - JotForm
 - KALL8

Please contact your Total Expert Customer Success Manager with questions.