Production Release AUG 2020 Release Notes

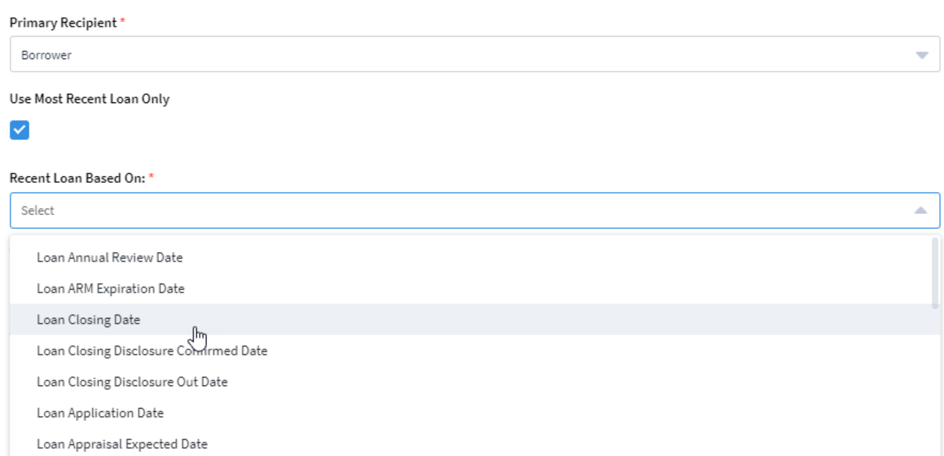
Aug. 27, 2020

This release includes:

- *Campaign Management*
- *Content Management*
- *Sales Productivity*
- *Data & Reporting*
- *API & Integrations*
- *Platform Enhancements*

Campaign Management

- Auto Campaign Actions: 'Most recent loan date only' checkbox
    - Now when creating a new Auto Campaign action that is triggered by a loan date if the “Most Recent Loan Only” checkbox is selected, a new option will appear: “Recent Loan Based On:”
    - This dropdown will allow users to select a specific date they want to be checked when determining which is the most recent loan (e.g. most recently created loan or the most recently closed loan etc.)
    - For example, if the action is part of a post-closing campaign, admins may want to trigger the action only for the borrowers most recently closed loan
    - All existing Auto Campaign actions will continue to function exactly as they have before, no action is required from admins unless they wish to take advantage of the new functionality



- When setting the event parameters for the "Landing Page Theme" Journey condition, themes will show as options even if the user does not have the ability to create any landing pages with those themes
    - When using Landing Page Themes within Journeys, users creating Journeys will now only see Themes enabled for their organizations

Content Management

- Print Order Notifications: Payment reminders and success notifications
    - Total Expert now sends email reminders for orders over 24 hours, 72 hours, and 1 week old. All parties responsible for payment who have not yet paid are notified
    - Payment reminders can be turned off at an organization or user level
- Display property status when displaying property listings
    - The listing selection experience within print, web marketing, and social now include the listing status on the property tile. A user can also filter to only include active and inactive listings in the selection experience
- Video Thumbnail disappears on the canvas after clicking preview
    - Resolved an issue where preview images weren't showing up and displayed error messages when clicking on the preview button in the email editor
- Users attempting to pay via corporate billing for print marketing or general merchandise orders are receiving an error during payment
    - Resolved an issue with print order payment failing for the corporate billing option
- Infographic flyers: Changing restaurant/shopping auto selects multiple values
    - Resolved an issue that was prohibiting users from effectively selecting the right restaurant/shopping center options on an infographic flyer
- When deleting a Saved Social Media piece, the count on the left-hand side of the screen does not update automatically
    - Resolved an issue where the count in the left navigation filters didn't update when a social media asset was deleted
- Contacts unable to unsubscribe when using the Mail To: list-unsubscribe option
    - Resolved a styling issue that blocked the unsubscribe link on Hotmail

Sales Productivity

- Loan List Export will enable Organization Admins to export loan data on behalf of their users so they can extract data from Total Expert
    - *Loan List Export will allow an **Admin** to:*
        - *Export a list of loans from a user's account*
        - *Select the columns and filters they'd like to apply to the loan data*
        - Enable the feature for their users
- Listing Insights
    - Listing Insights is a new contact field within Total Expert that matches the address on a contact or loan with the address of a new listing from an MLS
        - Listing insights can be used as a Focused View Filter or as a trigger in automation via Journeys
        - Currently in Limited Availability, please contact your Customer Success Manager if interested in participating

Data & Reporting

- Marketing Activity Dashboards
    - What are they?
        - The Dashboards include two new tabs: Marketing and Email
            - Marketing tab
                - Total contacts by day
                - New leads by day
                - Average contacts on campaign per day
                - New leads by lead source
                - Contacts by organization group
            - Email tab
                - Aggregate email activity by day (sent, delivered, opened, clicked, unsubscribed)
                - Email activity by email template (same metrics as above)
        - Why are the marketing dashboards valuable?
            - Remove guesswork from reporting with a holistic summary of current marketing activities and performance
            - Understand overall engagement quickly by accessing a single source of truth that tracks and measures marketing activity instead of sifting through multiple reports and data
            - Optimize marketing strategy by easily identifying gaps or redundancies in customer touchpoints
- Marketer Dashboard: Drip campaign activity now appears in the Campaign Activity widget on the marketing activity dashboard

API & Integrations

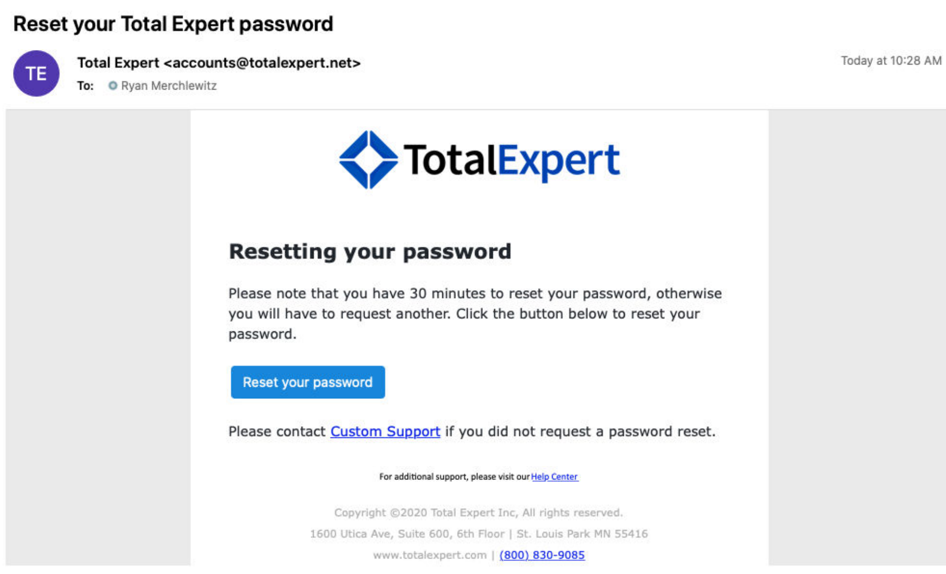
- Contact Activity Webhooks
    - *What are contact activity webhooks?* Webhooks are a form of API that sends data about a contact's activity to other systems, such as clicking a link in an email or was sent a print asset
    - *When should I use contact activity webhooks?* If you're using a third-party system outside of Total Expert to track or report on contact activity, such as a CRM or marketing or sales analytics tool
- API for SMS Opt-In
    - *What is it?* A set of API endpoints that connects contacts' SMS opt-in/opt-out records from other systems in Total Expert so that the record of opted-in or opted-out is consistent across the org and contacts are not asked to opt-in multiple times
    - *When should I use it?* If you're managing SMS text messaging in multiple systems outside of Total Expert
- When a loan is soft-deleted, loans are unable to be created via API in the same user account with the same loan number

- Resolved an issue in the API where a new loan could not be created with the same number of a previously deleted loan

Platform Enhancements

- Recruiting Module
    - Drive growth by implementing a consistent, end-to-end recruiting process proven to attract and retain top-performing talent
        - *How does it work?* With Total Expert, your organization will deliver a consistent and repeatable experience proven to attract top talent from the moment you source a candidate to onboarding. By centralizing data and recruitment activities in to a single, easy-to-use interface, your teams will better prioritize recruitment activities, automate outreach and nurturing, manage workflow across managers and recruiters, and scale your content library.
        - Contact your Customer Success Manager to learn more
- Wholesale Module: Gain a competitive advantage with Total Expert for Wholesale - A new configuration of Total Expert purpose-built for wholesale lenders
    - Achieve aggressive growth goals by delivering an amazing broker experience and providing the marketing and sales tools brokers need to compete.
        - Accelerate growth with a proven sales and marketing platform purpose-built for wholesale lenders that you can quickly and cost-effectively implement instead of developing a solution on your own.
        - Build stronger and more profitable broker relationships with broker contact management, more efficient and transparent loan processes, automated education and engagement programs, and broker performance metrics.
        - Close more loans by automating activities and communications on behalf of brokers triggered by POS or LOS systems and never let a broker miss an opportunity for recapture with retention triggers.
        - Enable brokers to build brand trust and save time and money by giving them access to easy-to-use enterprise-grade marketing and sales tools and customizable pre-built content.
- Password Management: Resent password – updated workflow
    - When requesting password resets, Total Expert will no longer send the updated password via email.
        - Upon password reset, the user will receive an email with a link, which will bring them to a new landing page to set a new password
            - If there isn't a token attached to the URL parameters, it will redirect you to the login page
        - The user's request is only valid for 30min. Once this time has passed, they will get redirected to the forgot-password page to request another temporary password
        - If the user is inactive, they will receive an error message indicating that they must provide a valid email; they will be unable to reset their own password
    - When resetting passwords, the user will need to create a password that aligns to the strength and reuse policies configured by their organizations in Total Expert

- Password Reset Request



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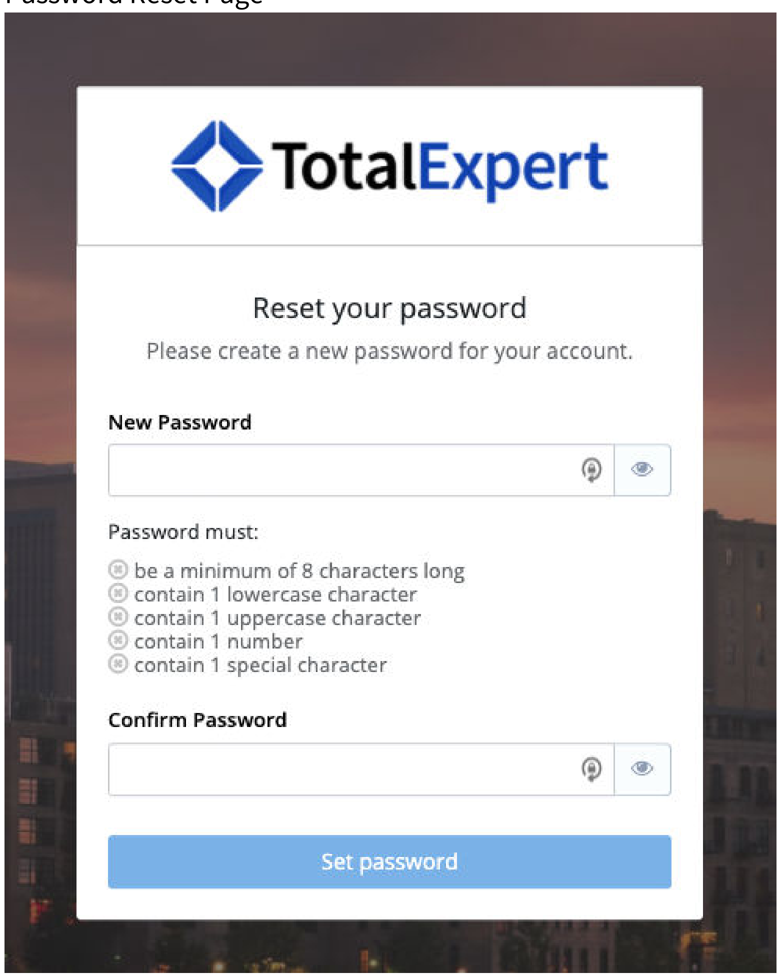
- Password Reset Page



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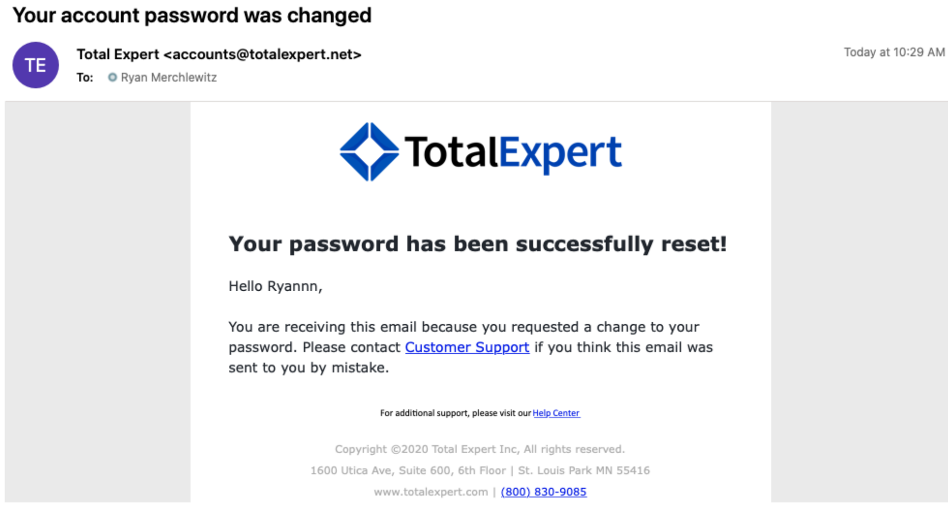
- Password Change Confirmation


Your account password was changed

TE Total Expert <accounts@totalexpert.net>
To: Ryan Merchlewitz
Today at 10:29 AM

TotalExpert

Your password has been successfully reset!

Hello Ryannn,

You are receiving this email because you requested a change to your password. Please contact Customer Support if you think this email was sent to you by mistake.

For additional support, please visit our Help Center

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Please contact your Total Expert Customer Success Manager with questions.