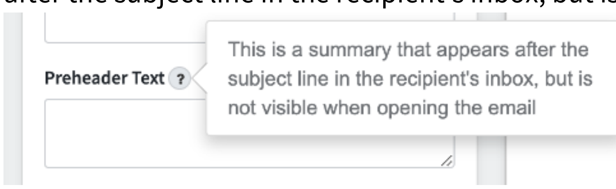
Production Release FEB 2020 Release Notes

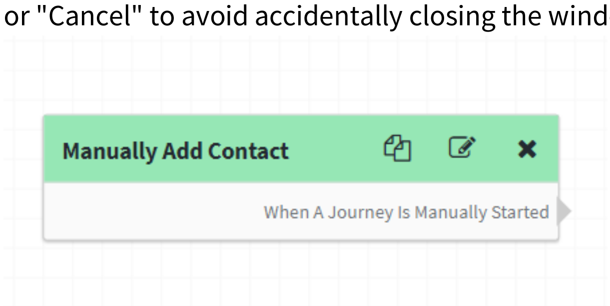
Feb. 25, 2020

This release includes:

- *Marketing/Co-Marketing*
- *Leads and Contacts*
- *Data and Integrations*
- *Platform*

Marketing/Co-Marketing

- Emails: Pre-header text
    - Users can now enter pre-header information. A pre-header is a summary that appears after the subject line in the recipient's inbox, but is not visible when opening the email
    - 

- Emails: Enable emojis in emails
    - You can now include emojis in emails, including subject lines and pre-headers
- Journeys: Clicking off modals in the Journey workflow editor should not close the window
    - The size, spacing, color and contrast of the edit, copy and delete buttons on Journey events have been adjusted to increase usability and accessibility. Modals will no longer close by clicking outside the modal, but instead will require the user to click "X" or "Cancel" to avoid accidentally closing the window and losing work
    - 

- Journeys: Loan and Contact date conditions
    - Users can now configure conditions on event parameters to be an exact date (month/day/year) or by the anniversary of a date, starting 1 year after the exact date

- 

- Journeys: Timer Delay not moving leads to next event in some cases
  - We have introduced some additional logging and performance improvements to Journeys which will allow scheduled events to process much faster
- Dynamic videos: Viewing a preview of an email template with a dynamic video does not display properly if user does not have access to that email template
  - Users will now be able to preview dynamic videos embedded within automated emails from the Email Stats page or Activity Stream even if they have not been granted access to send those emails
- Drip Campaigns: Users are prompted to select a co-marketing partner using the "assign to Groups" function on a Drip Campaign
- Drip Campaigns: Improved performance for sending drip campaigns where previously emails failed to send
- Home valuation template: When selecting to apply loan officer or agent branding on the Home Valuation landing page theme, branding will now correctly appear when the page is created
- Resolved issue where select users were unable to submit direct mail print orders when editing the list of contacts to whom the order should be sent
- Resolved issue where print orders were not generating distribution lists
- Resolved issue where when new leads are created from specific lead sources that share leads with co-marketing partners, leads will only be shared to active co-marketing partner connections
- Resolved issue where contacts who were scheduled to receive a canceled email were shown twice within Email Stats page
- Resolved issue where blank co-marketing email was sent

Leads and Contacts

- Updated lead count of selected groups in auto-campaigns to reflect the accurate number of non-deleted/non-archived leads
- Resolved issue where Realtor.com leads were not correctly parsing into Total Expert
- Resolved issue where the Lead Capture Responses panel was being displayed on merged contacts even if no Lead Capture Responses had been captured for that contact

Data and Integrations

- Adjustments to the Office365 and Gmail integrations: Within a lead record, the "Office365 Messages" and "Gmail Messages" tabs no longer display the send date of the emails displayed within each tab
  - When connected to Office365 of Gmail through Integration Settings, users who click to view Office365 of Gmail messages within their contact records can see the send date of each Office365/Gmail message
  - Office365 and Gmail messages will now only display within contact records if the message was sent to or received from the email attached to the contact record
- Blend: Unable to send shared contacts to Blend
  - Users who are integrated with Blend can now push contacts they do not own (contacts who are shared with or assigned to them) into Blend from their Total Expert accounts
- BombBomb: Sending BombBomb video through Opportunities section utilizes Basic Integration even if Org is set up with Advanced Integration
  - Resolved issue where users who had advanced BombBomb workflows enabled were directed to the basic integration
- Compass Point: Resolved issue with incorrect calculation of LTV for templates integrated with Compass Point pricing engine

Platform

- SPS WCAG Modern and Cavallo are not displaying the social media share icons in the site preview
  - Added social media share widgets to Modern and Cavallo Single Property Site template themes
- Improved performance when creating data through Lead Surveys endpoints
- Invalid actions options displaying on organization/groups/list page
  - Updated organization admin - teams action items to display only valid action items
- Resolved issue where new lead SMS notifications were sending twice to AT&T users

Please contact your Total Expert Customer Success Manager with questions.