TotalExpert®

Production Release JAN 2020 Release Notes

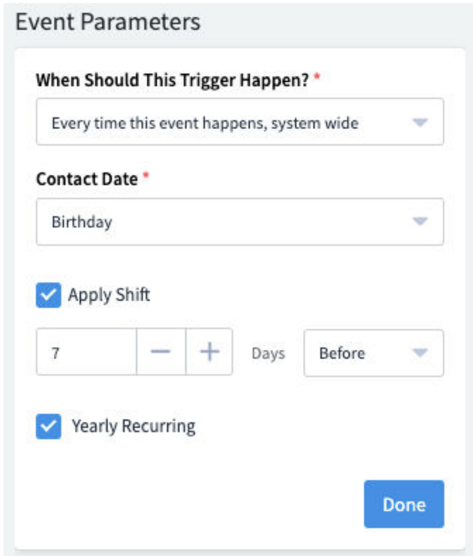
January 29, 2020

This release includes:

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

Marketing/Co-Marketing

- Loan Date and Contact Date Journey date triggers
  - What's the feature?
    - Two new features are now available for Journey date triggers: Loan Date and Contact Date
    - Users can now apply a date shift to a contact date or loan date trigger. They will also be able to configure whether the trigger should fire on the exact date (month/day/year) or the anniversary of a date, starting 1 year after the exact date. Previously all loan date triggers fired on the exact date only, and all contact date triggers only fired on the anniversary of the date
  - What's the problem we're solving?
    - This will help with simplicity of Journey design. A single trigger can now be used in place of what previously required a looping time delay with condition check
  - When would you use this?
    - For example, a Journey can now fire 7 days before the anniversary of the closing date for a loan file each year, reminding the user or the borrower of their upcoming annual review
  - Who has access to this?
    - This feature is available to all TE users with access to Journeys today



- When editing email templates in Microsoft Edge browser, users are sometimes met with a TypeError
  - Users who are saving email templates on Microsoft Edge can now consistently save their content
- Email: Fonts and Images not rendering correctly in emails
  - Updated email builder to ensure that fonts and images are correctly rendered within email content
- Internet Explorer:
  - Email names misaligned when viewing in "list" view within Internet Explorer
    - Emails will correctly align when viewing Email Marketing -> Emails page on Internet Explorer
  - Media will not render
    - Fixed an issue where template would not render when creating a print or social media marketing piece in IE11
- Public remarks not pulling into Rate Flyers
  - Fixed an issue where public remarks were not being pulled into certain Rate Flyers
- Blocks being opted out
  - Ensure contacts that are blocked when trying to send email are not opted out by default
- Co-branded social media pieces do not show in user accounts due to check that sees if they have a markup/cost split applied
  - Co-branded social media pieces without cost splits will successfully show for users in Web Marketing > Social Media > Create new
- For organizations utilizing both BitBucket and S3, error message appears when attempting to share Social Media Video (MP4) pieces created in S3

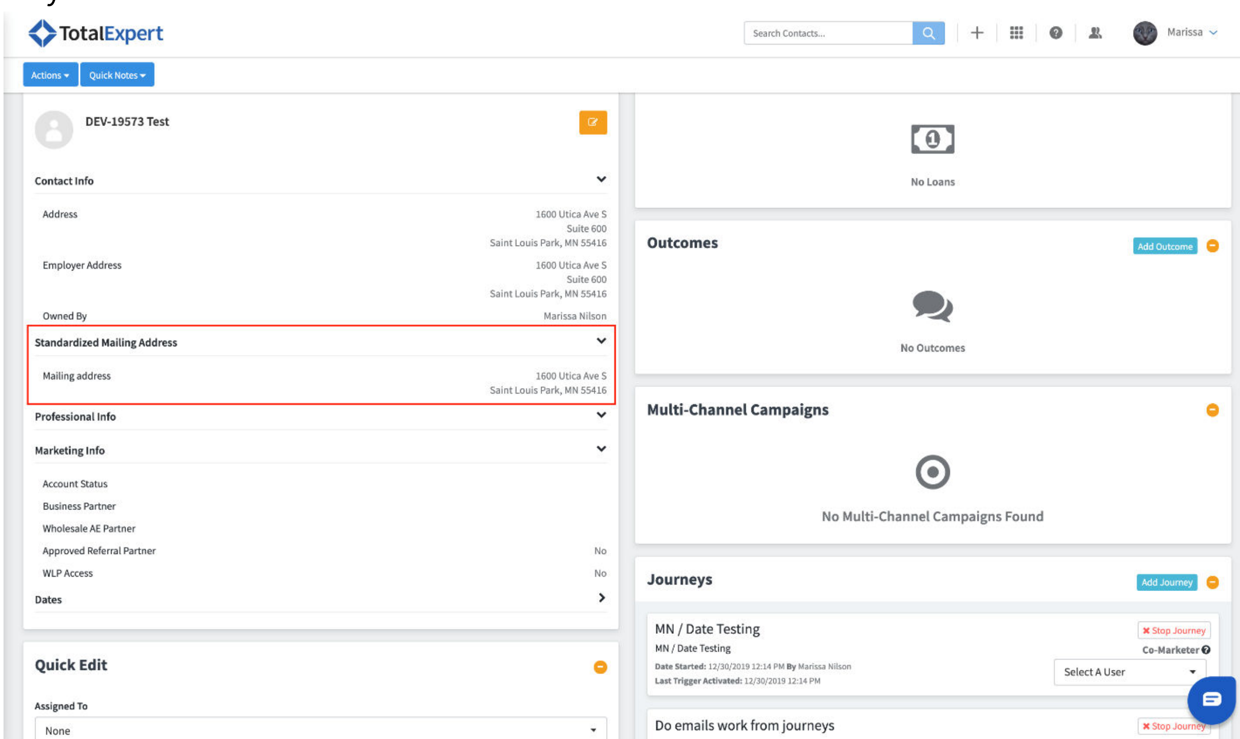
- Resolved issue where users were seeing error messaging when trying to share social media content to Facebook

- PNG generation fails for print flyer in some case when wkhtml is the selected PNG generator for the template
  - Resolved issue where generating certain PNG files would display an error
- Drip Campaigns: Bulk assignment from/lead/list page throwing error
  - Notify users when assigning contacts to a drip campaign from the Leads & Contacts list when they are attempting to add a number of contacts who have previously unsubscribed
- Previews of emails do not work when creating Drip Campaigns
  - Fixed an issue where users could not see a preview of emails they had created for a Drip Campaign

Leads and Contacts

- Focused View
  - Focused View Outcomes did not appear on lead if lead was shared/assigned to you and you selected an outcome
    - Users who collaborate on leads will see both their Outcomes and the Outcomes from their team members within Focused View
  - Focused View Outcomes on contact record showing inconsistencies
    - Applying an Outcome from the contact page no longer shows duplicates or blank spaces at varying screen sizes
  - Changing the Focused View URL in the address bar doesn't change tabs
    - Resolved issue where typing in the URL of Custom Focused View did not change tabs from the Standard views
  - If the user deletes an Outcome that is already on a card, the Outcome isn't removed from the card until the page is refreshed, leading to multiple issues
    - When deleting an Outcome as a Marketer from the Focused View Builder page, that Outcome will no longer be visible to the salesperson on the Focused View page
- Improve performance of contact exports through UI
  - Improve performance time when exporting contact data from Total Expert through the Leads & Contacts list
- Agent users unable to edit spouse info within contact records
  - Agents will be able to edit and save spouse information within contact records
- When "Lead: Group SMS" permission is disabled, the "Send an SMS" option in the ellipses menu next to a contact does not prompt the pop-up asking you to opt them into SMS
  - Users without ability to send SMS messages in bulk will now see the prompt requesting to opt contacts in to receive SMS messages

- New Lead SMS notifications: Formatting issues for AT&T
  - Resolved issue where New Lead SMS notifications being sent to AT&T users were not correctly displaying contact information
- Lead Sources: Settings not saving group selection
  - When automatically assigning a group to a contact through a lead source, users will now consistently see that group assignment when viewing the contact record
- Display standardize address on contact (lead) view page
  - Customers who are using Total Expert to manage their contacts will view a standardized address within the contact details page. This information is coming from a third-party provider and will not be used in marketing related efforts at this time, but may be utilized in the future.



Data and Integrations

- Blend integration: Failing to authenticate users at the time of integration so it appears users are connected
  - Users using Integration Settings to connect their Blend accounts within Total Expert will now see an error message if they have provided an invalid email address (missing an @ or an extension)
  - Please note: If the user has provided a valid email address but that email address is not contained in Blend, this will not display an error, and the user will not be able to push contacts to Blend
- Compass Integration: Need to use TargetPrice section when generating rates

- For customers who are integrated with Compass Analytics, rate assets will now use TargetPrice information returned from Compass's API

- Data Importer: UI updates based on demo feedback
  - Users who have access to the data importer within the Total Expert platform will now be directed to the import wizard when clicking "New Import"
- Sales Boomerang: Change labels for products
  - Sales Boomerang has changed the terms they use from Market Watch to Mortgage Inquiry Watch; users who are using the Total Expert and Sales Boomerang integration will now see references to Mortgage Inquiry Watch within task content and within Activity Stream/Recent Activity indicators
- Auto-Campaign not triggering on Loan Updates
  - Resolved issue where auto-campaign conditions were not correctly firing for all qualified contacts
- Add hash to update/create responses in EAPI
  - Effective in our January R1 release, customers using the Total Expert API will see an addition to the data they see in API responses returned when POSTing and PATCHing contacts. The responses will now contain an additional value labeled "hash"
  - This hash value represents the latest update to the contact record, which customers can use in comparing the current hashed value to the last update they've made to contact records within their data warehouse and is not a version increment to the API
  - Customers would use this when determining whether they need to retrieve updates to contacts based on webhook notifications. For example, if a customer receives a webhook notification for a contact, they can use the hash value to determine if that change originated based on a change the customer has made via API, which would mean that the contact wouldn't need to be pulled from the Total Expert API, or whether another source has updated that contact, which would require the contact to be pulled from the Total Expert API

Platform

- Role list not refreshed when duplicating role
  - When duplicating roles, the list of available roles will now refresh to display the newly created role
- Improve phone number search
  - Updated search to find phone numbers regardless of format. For example, if you search for 6515551234, you will find results for:
    - (651)555-1234
    - 651-555-1234
    - 651.555.1234

        - 6515551234
        - And any other variation of the number as long as no letters are included in the search field.
    - Tasks list is not filtering out completed tasks by default
        - When viewing the Task list, users will now only see incomplete tasks by default; users may remove the filter to view completed tasks as needed
    - The Task email notification home phone field populates the office phone number instead of the contact's home phone
        - New Task notification emails will now contain the contact's home phone instead of the contact's office phone
    - XSS issues discovered in production
        - Customers will no longer be able to insert custom JavaScript within Single Property Sites

Please contact your Total Expert Customer Success Manager with questions.