Production Release MARCH 2020 Release Notes

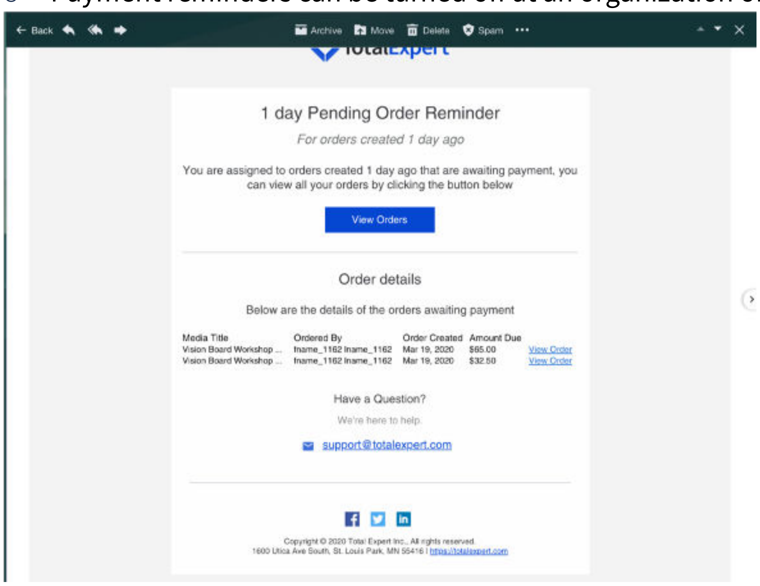
April 1, 2020

This release includes:

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

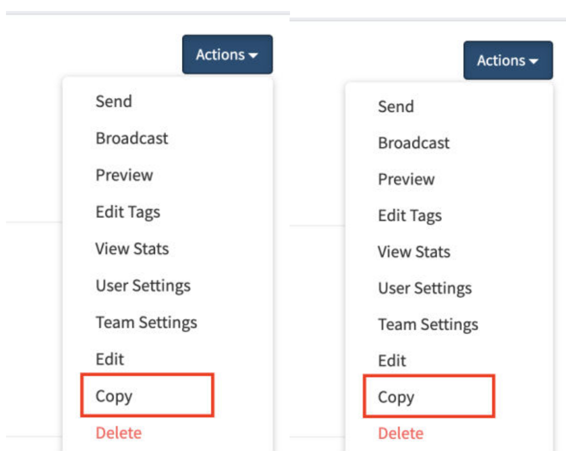
Marketing/Co-Marketing

- Print Orders: Payment reminders and success notifications
    - Total Expert will now send email reminders for orders over 24 hours, 72 hours, and 1 week old. All parties responsible for payment who have not yet paid will be notified.
    - Payment reminders can be turned off at an organization or user level.



- Print Marketing: No longer require cost-split when saving a published asset
    - To ensure that compliance checks around requiring cost splits are re-run, saved changes to a published print/social asset will go unpublished.
    - Print Status Changes: Better print status items/labels on Print Marketing
    - Orders page:
        - You'll notice that the naming on the "Preparing to Print" status has changed to "Submitted to Printer" to provide clarity
        - The "Processing" status is now segmented into "Awaiting Payment" and "System Processing Order" statuses to provide more accurate descriptions of each stage.

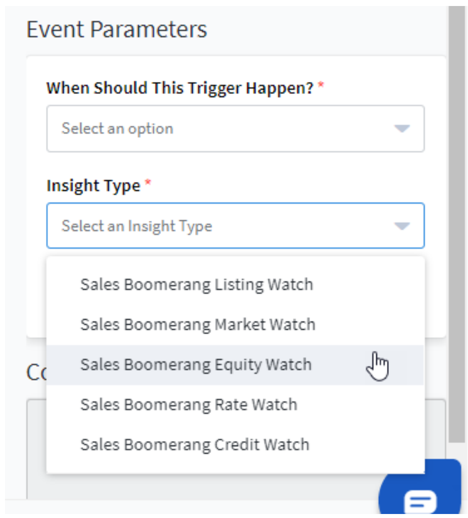
        - Changed “Order Date” label to “order Created Date” to better reflect the date included
        - To better track when the items were delivered to the printer, we’ve added a “Submitted to Printer Date” field.
- Print Marketing: We’ve restored the ability to download the distribution area .csv when viewing Reporting
- Auto Campaigns: We’ve removed duplicate columns from generating in-print auto campaign .csv files
- Co-Marketer Lead Source Welcome Email: Users can now select “No Co-marketer" when assigning a usually co-branded email to a Lead Source
- Co-Marketing partner pages will now correctly display all postcards created with co-marketing partners
- Users can now remove a Welcome email that has been attached to a Lead Source
- Marketers to copy emails: Marketers who have created emails can copy an email they’ve created within the email list
    - Any access assigned to the email that was copied will not be available on the new email copy, which will avoid accidentally publishing
    - Access to the feature is controlled by the permission “Email: Allow Copying Emails”

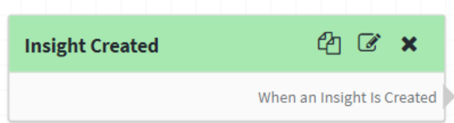


- Dynamic content: Add account data placeholders for content
    - All standard fields on a product (checking account, savings account, etc.) are now available as placeholders to utilize for dynamic content
- Inconsistencies with email pre-header text: We’ve resolved an issue with pre-headers not rendering correctly on some email clients
- Drip Campaigns: We’ve updated Drip Campaign email stats to correctly reflect the number of recipients to whom the email was sent to
- Global Image Library: Users can now select multiple images at once when uploading to the Global Image Library.

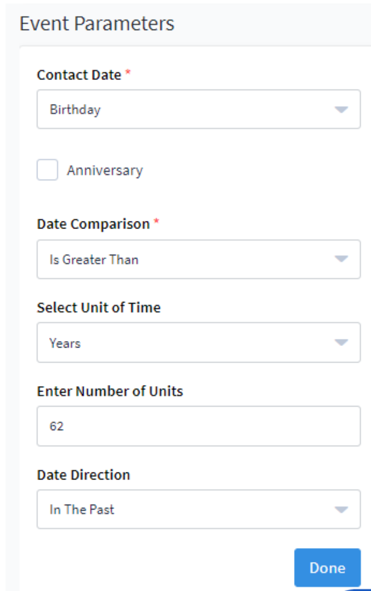
Journeys

- Sales Boomerang Triggers: You can now easily trigger your Journeys with Sales Boomerang alerts if you have Sales Boomerang! Once the appropriate permissions have been enabled, just use the "Insight Created" trigger and select the alert you'd like to start your Journey. *Contact your TE representative with any questions you may have about enabling this feature.*



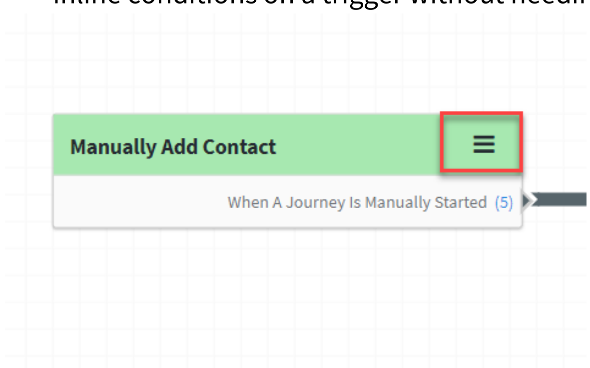


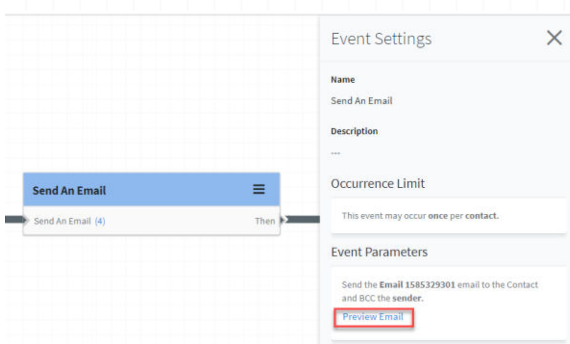
- Birth year condition updates for Journeys
    - What is it?
        - We're introducing new functionality on the "Contact Date" options available in Journeys. Users will now be able to control the unit of time they input
    - When would you use it?
        - When a lead must meet certain age requirements before a specific product or service can be marketed to them (e.g. Reverse Mortgages)
            - Example: to confirm a customer is over 62 years of age, you could configure a contact date condition in this way:



- Note: your organization must have the birth year permission enabled

- View Journey page improvements
  - Users can now open the event settings panel in a read mode from the View Journey page
  - This will allow users to preview emails or review other important information like inline conditions on a trigger without needing to own and edit the Journey





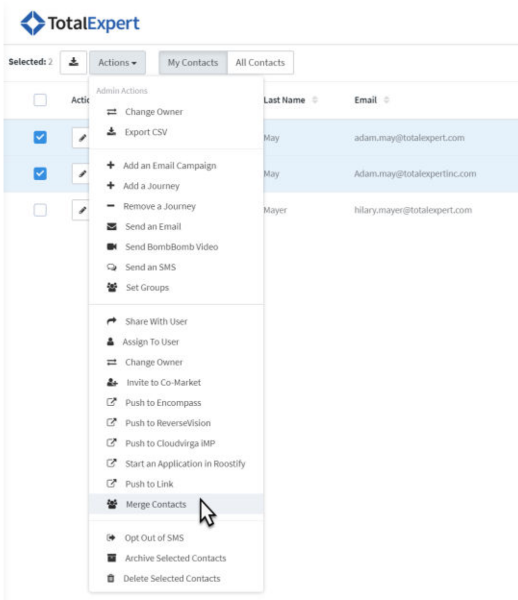
- Journey names for Triggers/Actions/Events/Conditions that are too long extend underneath buttons

- We’ve addressed a defect where longer Journey event names go under and "clip" the copy / edit/ delete buttons. Longer names will now end in an ellipsis before going "under" the buttons.

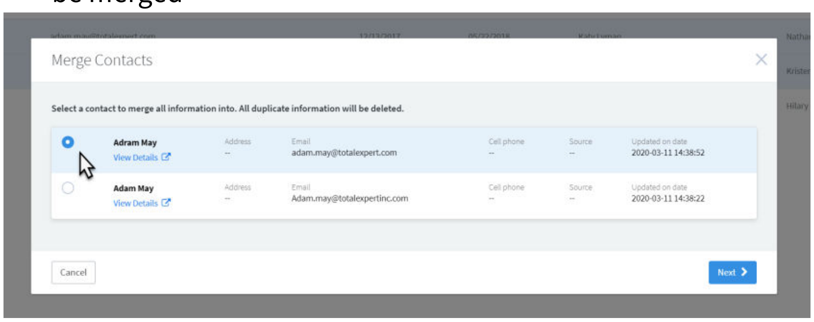
- When selecting a team member within an “Assign a Contact” or “Share a Contact” Journey events, users can now select their team members, even without co-marketing permissions

Leads and Contacts

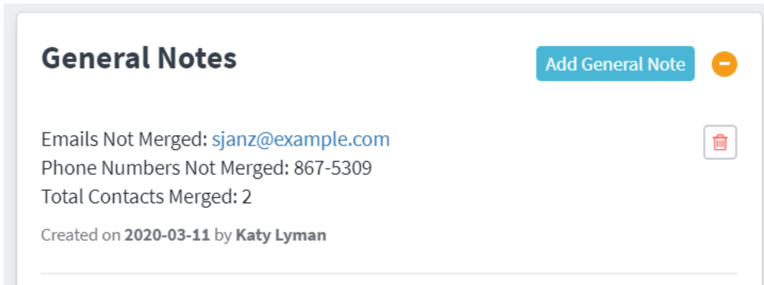
- Merge Contacts
  - Customer-facing teams and organizations often struggle to identify and manage several instances of the same contact record across their database. Users can now identify and merge duplicate contacts to reduce the risk of misaligned sales and marketing engagement and ultimately deliver a better, more consistent experience.
  - New Permissions
    - Lead: Merge Contacts - This permission enables a user to merge contact records that they own or to which they are assigned.
  - Terminology
    - The following are terms commonly used throughout this document related to the Merge Contacts feature:
      - Primary contact: the contact into which all records will be merged
      - Duplicate contact: the contact(s) being merged into the primary contact
      - Merged contact: the contact resulting from a merge action
  - How Merge Contacts works
    - From the Leads & Contacts list, a user can select to merge up to five contacts that they own and that they perceive as duplicates in order to maintain integrity in their marketing database



- The user must choose a primary contact record into which all duplicates will be merged



- Any empty contact information fields on the primary contact record will be populated with data from duplicate records
- If the user is merging multiple contacts that all have contact information, the contact information from the most recently updated contact will be placed into the primary record
- External IDs from any contact records present as part of the Merge Contacts functionality will be preserved on the primary contact record
- Note: Address fields (street, street2, city, state, zip) will be considered as a block
- Merged emails and phone numbers from duplicate contacts, which will no longer be on the primary contact, will be captured in a note visible within the General Notes panel on the merged contact



- Retaining activity history
  - Information around marketing activity over time, such as Notes or Recent Activity, will be added to the merged contact record
  - For example, if Contact A has a General Note from 3/1 and contact B has a General Note from 2/19, both General Notes would be visible on the primary contact record after a merge occurs
  - If duplicate contact has provided lead capture app responses (e.g. LeadPops, Home Loan Lead Form), duplicate contacts' responses are captured as a different set of responses
  - Tasks from the duplicate contacts will be added to the primary contact
  - Completed tasks from the duplicate contacts will be visible on the primary contact record
- Retaining loan and product history
  - If the duplicate contact is attached to a loan (or multiple loans), all loans from the duplicate contact are affiliated with the merged contact
  - Loans to which duplicate contact was attached now reference merged contact so that the user can access the view of the correct contact
- Managing shared/assign contacts
  - Users with whom the primary or duplicate contacts had been Shared will have the merged contact record shared with them
  - If the duplicate contact and the primary contact are both Assigned, and the Assigned user from the duplicate and primary contact are not the same user, the primary contact's Assignee will be retained
- Preserving marketing consent
  - If the email address is the same between the duplicate and primary contact, but one contact record is unsubscribed, the contact will remain unsubscribed once the merged record is created
  - If the mobile phone is the same between the duplicate and primary contact, but one contact record is opted out of SMS, the contact will remain opted out of SMS once the merged contact record is created
  - If one of the contacts who is being merged has been silenced, the merged record will be silenced
- Preventing duplicates on merged contacts

- If a third-party system (like an LOS) attempts to provide updates to a duplicate contact that's been merged, Total Expert will recognize that a duplicate contact record has been merged and will not create another contact record
- Updates to the duplicate record provided by the LOS will be applied to the merged contact record
- If the duplicate contact that the third-party system is trying to update has one or more loans in statuses where contact updates should not be processed, those updates will not be applied to the merged contact record

  - Journeys on merged contacts
    - If a duplicate contact and primary contacts are active on the same Journey, the merged contact will be kept in the furthest possible step on that Journey
    - If the primary contact and duplicate contact are on different Journeys, the merged contact will be on all non-duplicate Journeys
    - Any Journey recurrence limits (e.g. per contact or per loan) will be honored for the merged contact record after they are merged
  - APIs and webhooks:
    - Users who are subscribed to webhooks would receive the following notification after contacts were merged:

{"item":"CONTACT", "id":11,"action":"CREATED", "hashValue":"7754099469a159fe64f84673c4a27670", "secret":"abcd1234"}

    - If the user attempts to Re-POST a contact that had already been merged, they would receive the following:

{"duplicate": "external-api.totaldev.us/v1/contacts/11", "id": 11}

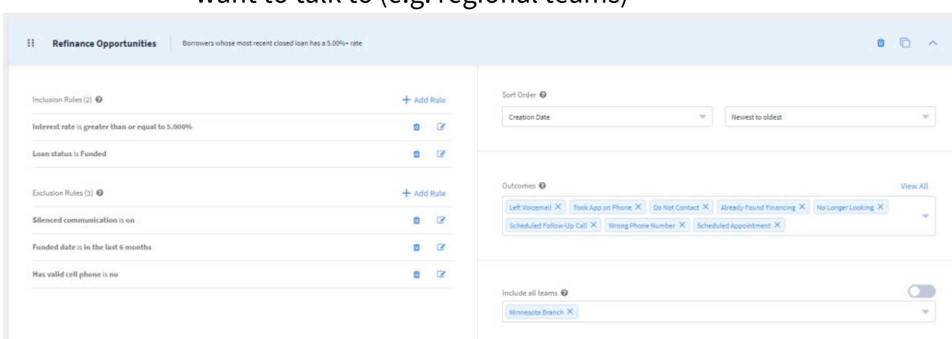
- View Lead Action menu overflows bottom of screen: When users are using the Actions menu on the Lead List and using a screen height less than 1068px, a scroll bar will appear so users may select any available Action
- Improved "new lead" and "lead shared" text notification behavior: Previously, if a user received a shared lead, they would receive both the Lead Shared and New Lead SMS messages. Now, users will receive only the Lead Shared SMS notification.

Data and Integrations

- Users leveraging BombBomb integration through Total Expert can record and save multiple BombBomb videos without refreshing the page
- Resolved issue where Blend invitations were expiring after 10 minutes
- Resolved issue with Agent Users endpoint returning a 503 error
- Price My Loan: Updates to PriceMyLoan integration allowing users to connect to PML with their personal or organization assigned credentials rather than using shared credentials across an organization.
  - *Existing organizational level integrations will continue to work as normal. Organization-level integrations are still available.

Platform

- Emails sent in test mode will be queued to send immediately, not scheduled in UTC
- Agent Profile Progress Bar: Remove requirement for license number to be included within an agent's profile to be marked as complete. Profiles will now be marked complete if they have all required profile information
- Disable submit button on Appointments when clicked until appointment has been created to prevent duplicate appointment creation
- Focused View: Resolved issue where Focused View card does not revert to a published state after selected "discard changes"
- Focused View: Assign team access
    - Problem we're solving:
        - Marketers want to provide their salespeople with a prioritized list of sales opportunities, but sharing irrelevant Views makes it difficult for sales to identify their true priorities.
    - How does the customer benefit from this solution?
        - Marketers can choose Teams to access specific Views within Focused View
    - When would customers use this?
        - Marketers whose salespeople are using different criteria to establish who they want to talk to (e.g. regional teams)



- Disable Platform login when SSO is enabled:
    - Customers utilizing Single Sign On (SSO) may block direct login access to the Total Expert platform outside of Single Sign On
    - Customers who are using SSO who are interested in using this feature may submit a request to their CSM/Implementation manager.

Please contact your Total Expert Customer Success Manager with questions.