Production Release MAY 2020 Release Notes

MAY 27, 2020

This release includes:

- *Campaign Management*
- *Content Management*
- *Data & Reporting*
- *API & Integrations*
- *Platform*

Note: We restructured the organization of enhancements by the product's core functional areas, which we call missions.

Campaign Management

- Campaign Builder: Email
  - What is it?
    - Campaign Builder gives you the power to target specific audiences with timely, personalized campaigns, and accurately measure the impact. While Journey Creator is our automation solution for always-on nurturing programs, Campaign Builder is our automation solution for outbound campaigns that target specific segments of your customer base at the same time
  - Why is it valuable?
    - Increase conversions by delivering relevant and timely content to customers and prospects across communication channels at critical moments in their financial journey
    - Prove marketing's business value to the organization by better understanding what content, promotions, channels, and marketing activities are driving results
    - Reduce campaign costs and time by automating marketing activities at scale using one platform to deploy a series of dynamic communications
    - Build brand trust and loyalty by ensuring timely, relevant messaging and consistent engagement
  - How does it work?
    - Create a new campaign in the Campaign Builder page and set the conversion criteria
    - Build a target audience that spans databases using inclusion and exclusion rules
    - Validate the audience is set up correctly by downloading and reviewing a list of audience members
    - Select and schedule your campaign emails
    - Run the multi-touch campaign on behalf of the brand or loan officers

- Measure the overall results of the campaign and the individual emails in the performance dashboard
- For step-by-step instructions, go through the simulation or review the product guide

- Who will have access to this?
  - On Wednesday 5/27, admins will automatically receive access to Campaign Builder
- What is still to come for this feature?
  - The feature will continue to evolve to include the channels and capabilities you need to run and measure a comprehensive multi-channel marketing campaign, including Facebook advertising, A/B testing, and more
- Additional considerations
  - There are parts of the feature banking and credit union clients may want disabled if they aren't needed, including:
    - The ability to select multiple senders for your campaign if all your contacts are managed under a single corporate account
    - The ability to select loan statuses as a conversion goal in campaign settings if you do not integrate loans (auto, home) with Total Expert
  - Please contact your Customer Success Manager or Implementation Manager if you believe either of these scenarios apply to you

- Lead View: Success message after adding drip campaign displays with error styling
  - When successfully adding a drip campaign to a contact, message will now display the correct styling to indicate success

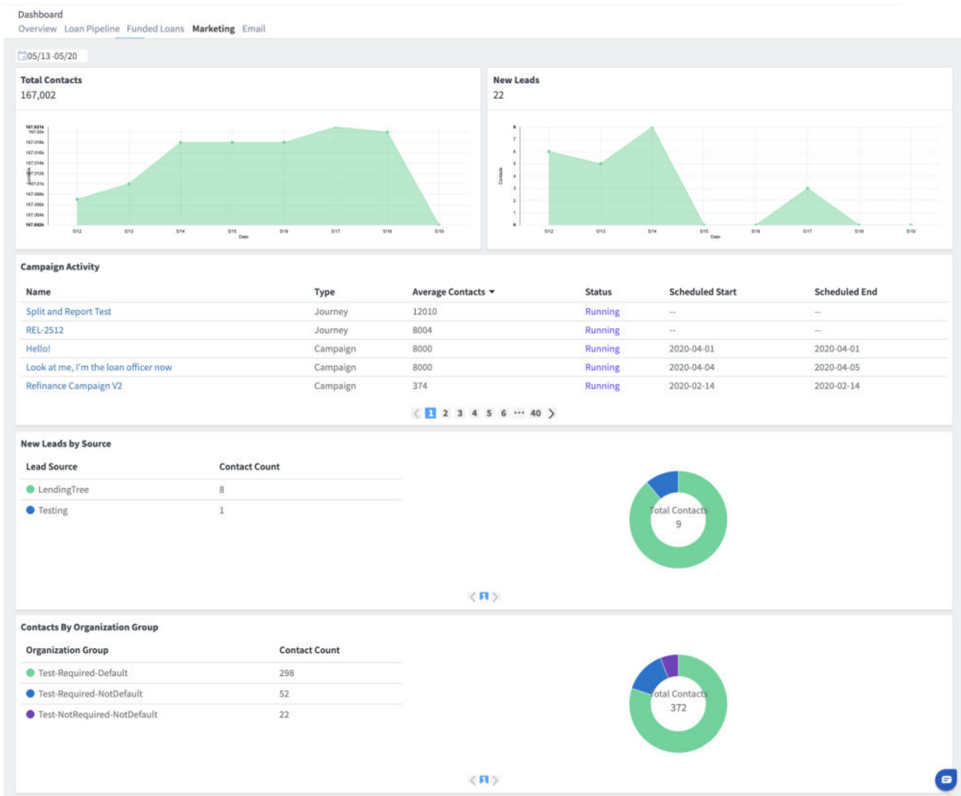
Content Management

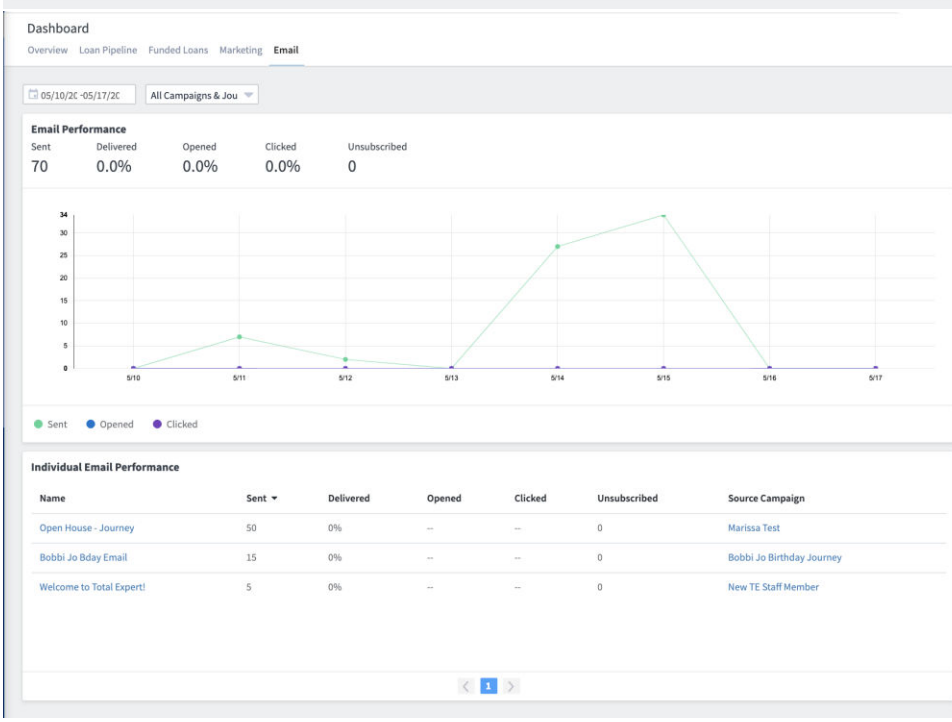
- Content Block Creator: Fixed an issue on our content block creator where an error message was displaying when filtering
- Social media: Fixed an issue where the download PNG action was exposed when it shouldn't have been for social posts
- BombBomb: Basic BombBomb emails aren't sending to leads with only work emails and email.work_email_fallback enabled
  - Fixed an issue with BombBomb emails not sending to leads with only a work email and no default email populated
- SPS templates Stylish and Sleek are not scaling images and cutting images off
  - Resolved issue where Stylish and Sleek Single Property Site templates were not properly placing tall headshots in the correct positions
- Websites list under "compliance" menu does not properly display link to site
  - Within Compliance - Websites, clicking on the site name within the Link column will correctly direct to and display the referenced Single Property Site
- Selecting Social Media Networks in media settings for "Social Media Video (YouTube)" pieces
  - Corrected issue not allowing users to select Twitter or LinkedIn within media settings when creating a "Social Media Video(YouTube)" type of asset

- "Submitted to Printer Date" column is missing from Print Order report
    - Added Submitted to Printer Date to the Print Orders and Print Marketing - Orders reports as default columns
    - Submitted to Printer Date is defined as the date in which the order was sent to the printer

Data & Reporting

- Marketing Activity Dashboards
    - What are they?
        - The Dashboard will 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
    - Who will have access to them?
        - On Monday, 6/1, admins will automatically receive access to the Marketing Activity Dashboards
    - Where can I find them?





- What is still to come for this feature?
  - We will be adding more tracking and metrics to show how marketing is impacting the business
- Social Media Report: Does not include current day's activity
  - Added current day's activity to Social Media Report

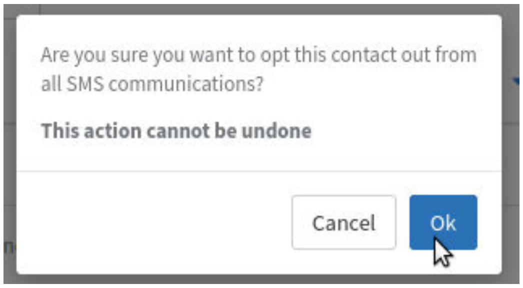
- Marketing Overview Report: Users can view a list of single property sites created, but not a list of landing pages created
    - Added ability to view a list of landing pages created by users from the Marketing Overview Report

API & Integrations

- Adjust XSD for LendingTree
    - Resolved issue with LendingTree formatting to align to their new specification
- Cannot connect customer provided email for Compass Analytics
    - When connecting to Compass Analytics through Integration Settings, success or failure messaging will be shown to the user so they understand whether their connection was successful

Platform

- Resolved issue where FTPS passwords using dollar signs were not recognized as valid
- Disable platform login for API users: Type 4 users who attempt to log in to Total Expert will no longer be able to access the platform interface
- Connected Partner Report missing connected on dates
    - Co-marketing partner page will now display the date the user was connected to the partner
- Connected Partner Report incorrectly classifies duplicate user connections as "Forbidden"
    - When a co-marketing partner has already been connected but a new invitation is sent, that invitation will be labeled as "Duplicate" in the Connected Partner Report
- Inconsistencies with home loan lead form
    - Resolved issues with home loan lead form to include descriptive property types and that Phone and Email are required fields for submission
- Safari: Activity Stream recent activity overlaps filters when browser is zoomed out
    - Resolved issue where Recent Activity overlaps when changing zoom settings in Safari
- Contacts unable to unsubscribe from user emails with the list unsubscribe method in some cases
    - Adjusted unsubscribe so that contacts attempting to unsubscribe using Outlook's native unsubscribe option will be successfully processed and unsubscribed
- SMS Opt Out action lacks confirmation prompt
    - When manually opting contacts out of receiving SMS messages, users will now see a confirmation dialog requesting that they confirm their action



Please contact your Total Expert Customer Success Manager with questions.