TotalExpert

Product Release Winter 2020 – Release Notes
General Availability: Dec. 9, 2020

This release includes:

- *Campaign Builder: Email*
- *Listing Insights*
- *New SimpleNexus Integration*
- *Journey Creator Reporting*
- *Product Training, Education, and Documentation*
- *Do Not Contact*
- *Email Opt-In API*
- *Developer Portal*
- *Expert Content Updates*

Campaign Builder: Email

Description:
Campaign Builder gives marketers the power to create, deploy, and measure multi-touch, outbound campaigns that target audiences spanning their users' contacts and connections.

How to Enable:

- Contact your Customer Success Manager to enable after the release on December 9.

What it Does:

- Campaign Builder allows a **Marketer** to:
  - Schedule and send emails on behalf of users (called "senders") in their organization
  - Create and add an audience to a campaign using the audience builder
  - Review email performance in terms of engagement across all participating senders
  - Notify senders of the upcoming emails when a campaign is scheduled
- Campaign Builder allows a **Sender** to:
  - Review campaigns running on their behalf in their Daily Digest
  - Review email content and campaign schedules running on their behalf in platform
  - "Opt out" of a campaign if desired and if allowed based on campaign settings
  - Filter contacts in their contact list based on campaigns that are running or ran on their behalf

How it Works:

- [Campaign Builder: Email Walkthrough Guide]
- [Campaign Builder: Email Simulation]
- [Campaign Builder: Email Feature Spotlight]

Why it Matters:

- Campaign Builder empowers you to target specific audiences that span across your contacts and connections with multi-touch, timely email campaigns, sent by the organization or personalized on behalf of users, and accurately measure the impact.
- Increase conversions by delivering relevant and timely content to prospects and customers across communication channels at critical moments in their lifecycle.
- Prove marketing's impact on the bottom line by better understanding what's driving results and tying those results back to campaigns.
- Reduce campaign costs and time by automating marketing activities at scale using one platform to deploy dynamic communications.
- Build brand trust and loyalty by controlling messaging while driving 1:1 communications on behalf of relationship managers.

Listing Insights

Description:
Listing Insights is a new feature within Total Expert that shows if a contact has listed a property for sale on the MLS in the last 7 days.

How to Enable:

- Contact your Customer Success Manager to enable after the release on December 9.

What it Does:

- Listing Insights will appear in contact detail pages under a new tile called Insights
- Listing Insights can be used as a Focused View filter and as a trigger in automation via Journeys

How it Works:

- [Listing Insights Feature Spotlight Video]

Why it Matters:

- Loan officers can now know when their clients are ready to buy their next home before they start their search.
- Create clients for life by using life and financial changes as opportunities to check-in, better understand where they are in their buying journey, and being there for them throughout the process as a trusted advisor.
- Never miss an opportunity by educating clients through automated, personalized communications on buying their next home.
- Help more customers and close more loans by knowing when you have the opportunity for repeat business.

New SimpleNexus Integration

Description:
The new SimpleNexus two-way integration syncs contacts between Total Expert and SimpleNexus. Also, SimpleNexus sends key milestone insights to Total Expert that can be used to drive marketing automation.

How to Enable:

- Contact your Customer Success Manager to enable after the release on December 9
- Prerequisites:
  - Must be a SimpleNexus user
  - You have Total Expert API access through a scope of work
  - SimpleNexus user must have valid Total Expert account

What it Does:

- Share contacts between both platforms regardless of where the contact was originally generated
- Deliver lead milestone insights performed in SimpleNexus to Total Expert to drive personalized marketing automation
- Milestone Insights include:
  - SN Borrower Linked
  - SN Partner Linked
  - SN Loan Application Started
  - SN Loan Application Abandoned
  - SN Loan Application Submitted
  - SN Contact Ran Calculation

Why it Matters:

- Access up-to-date customer profiles in SimpleNexus and Total Expert with two-way sync.

- Extract consumer milestone insights from SimpleNexus to get a clear picture of where a consumer is in the application process and message accordingly to reduce loan application abandonment.
- Deliver relevant marketing automation and messaging triggered by milestones in the loan application process.
    - Example: If a consumer starts the application process in SimpleNexus, a milestone insight of “SN Loan Application Started” is populated in Total Expert. If the consumer doesn’t complete and hasn’t interacted with the application for more than 90 minutes, a new milestone insight of “SN Loan Application Abandoned” will populate in Total Expert. When the consumer is on a Total Expert Journey these milestone insights can be used as Triggers to send automated, personalized messages to remind and re-engage the consumer to complete the loan application.

Journey Creator Reporting

Description:
Journey Creator Reporting allows users to create custom reports that aggregate event activity across all users in their organization for a single Journey.

How to Enable:
Journey Creator Reporting will be automatically enabled for all admins beginning December 9.

What it Does:
- Easily create, organize, and administer custom reports to see how contacts are flowing through Journeys across the organization.
- Report on overall conversion metrics, activity levels or in some cases usage of the platform.

How it Works:
- Journey Creator Reporting Walkthrough Guide
- Journey Creator Reporting Simulation

Why it Matters:
- Remove the guesswork and quickly understand Journey performance across touch points with custom reports built for your unique needs.
    - Example: Identify Journey performance gaps and adjust the messaging or communication cadence to optimize Journey performance to achieve the desired outcome (e.g. product adoption) or defined conversion goal.
- Segment data based on Teams and Users to understand performance.

Product Training, Education, and Documentation

Description:

- Product User Guides: Thorough, step-by-step guides to help Total Expert users address product-related questions around features and functionality.
- Training Resource Center: A new hub for all your Total Expert product education needs, including interactive feature walkthroughs, best practice and feature spotlights, and additional training videos.

What They Do:

- Provide easy to access training and education resources directly within the platform
- Enables your organizations to better understand how to operate and navigate the Total Expert platform with materials written for specific user levels

Why They Matter:

- Empowers you and your organization with the knowledge you need to be successful with the Total Expert platform.

How to Access:

- Product User Guides will be accessible through the Help Center icon in the platform.
    1.) Go to totalexpert.net
    2.) Log in with your username and password.
    3.) In the top navigation bar, click the question mark help icon.
    4.) Choose **Product User Guide.**
    Note: You need to click Open within the PDF viewer if you do not have Adobe PDF viewer.
    Note: You can also select "Help Desk" to search and find Product User Guides along with other helpful articles.

- Training Resource Center will be accessible through the Help Center icon in the platform.
    1.) Go to totalexpert.net
    2.) Log in with your username and password.
    3.) In the top navigation bar, click the question mark help icon.
    4.) Choose **Training Resource Center.**

Do Not Contact

Description:
Do Not Contact allows individual users to suppress future emails and text messages on behalf of your organization. They can also suppress print communication, but only at their individual user-level (not across the org).

How to Enable:

- The Do Not Contact permission will be available to admins on Dec. 9. Admins can choose to apply the permission across the organization.

What it Does:

- Do Not Contact will allow any user with the permission to:
    - Set a contact as "Do Not Contact" at the request of the contact
    - Remove the contact from their contact list
    - Place their record in a separate Do Not Contact List
    - Stop outbound email and text communication from the organization
    - Stop all print communication from the individual user

How it Works:

- Do Not Contact Walkthrough Guide
- Do Not Contact Simulation

Why Does This Matter:

- Empower relationship managers to ensure customers who do not want to be contacted are not emailed or texted by anyone across the organization or user base.
- Comply with CAN-SPAM and TCPA regulations for consumer communication preferences.

Email Opt-In API

Description:
Allows those using the Email Opt-in API to re-subscribe contacts to receive future emails.

How to Enable:

- Contact your Customer Success Manager to enable after the release on Dec. 9
- Prerequisites:
    - Total Expert API access has been granted through a scope of work
    - Unique Sendgrid IP

Why it Matters:

- Programmatically manage email subscribes in the Total Expert platform and keep customer preferences in sync with third-party platforms via API.
- Consistent subscription statuses across systems to ensure compliance with consumer preferences.

Developer Portal

Description:
A website for developers to access the resources they need to set up an integration with Total Expert, including documentation, credentials, case studies, and endpoints.

How to Enable:

- Total Expert will set up Portal access and send instructions to developers during the API setup process.

Why it Matters:

- The Total Expert Developer Portal streamlines the integration process for developers to help unify your customer data from across systems into a single source of truth faster.

Expert Content Updates

Description:
Expert Content newsletters help you build relationships with partners and borrowers. In October, Total Expert announced upgrades to the newsletter offering that will go live in 2021. The full newsletter package for December has been discontinued. However, please read below for newsletter availability as Total Expert prepares to launch new newsletters.

Current Availability:

- Total Expert will provide a monthly newsletter in December. In response to feedback, development has been accelerated to have a new monthly newsletter ready for use. It's intended audience is partners and realtors. Find it under Elevate in auto-campaigns.
- The Expert Update will continue through December. Total Expert will provide an Expert Update for the week of Christmas.
- Weekly and monthly newsletters will continue in 2021.

Why it Matters:
Data shows half of email recipients unsubscribe from newsletters that don't contain useful and engaging content, especially for emails that come too often. These upgrades will:

- Improve content-audience matching.
- Modernize newsletter layout.
- Increase content options for both partner and customer audiences.

We want your feedback on newsletters! Please complete our Expert Content Newsletter Survey on usage and preferences so we can deliver quality, timely newsletters to meet your needs in the new year.

Please contact your Total Expert Customer Success Manager with questions.