Product Release Fall 2021 – Release Notes
General Availability: October 27, 2021

General Availability Features/Functionality:

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Communications Package

Description:
Instantly connect with potential borrowers through phone and SMS text messaging. Manage outbound outreach directly from the Total Experience Platform while tracking communications history across phone, SMS and email for a complete view of customer engagement.

How to Enable:
Speak to your Customer Success Manager for more information about pricing.

What it Does:
Enables users to send and receive voice calls and 2-way SMS messages to potential customers directly within the Total Experience Platform. The Unified Conversation History then combines calls, call recordings, outbound emails, and entire SMS conversations in one easily navigated view.

Why it Matters:
Accelerates and personalizes the customer journey with telephony functionality natively integrated with an all-in-one CRM and marketing automation platform and empowers end users with essential insights into borrower needs to create a better customer engagement strategy and overall experience.

Unified Conversation History

Description:
Threads all customer conversations across multiple channels (email, phone calls and text messages) into a single view that is easy to consume at-a-glance so loan officers are immediately

brought up-to-speed on what has been communicated to that customer through their interactions with the organization.

How to Enable:
Enabled automatically for customers using the communications package.

What it Does:
Combines calls, call recordings, outbound emails, and full SMS conversations in one easily navigated view within the Communications Package.

Why it Matters:
Creates memorable and engaging customer experiences in which every touch point is recorded and presented to whomever is currently interacting with the customer so that each transaction can seamlessly pick up where the last one left off.

Workflow Engine

Description:
Intuitive lead routing design that automatically connects leads with the loan officer or relationship manager to meet their needs at scale.

How to Enable:
Speak to your Customer Success Manager for more information about pricing.

What it Does:
Provides Round Robin Lead Assignment to disperse leads to end users based on an established queue; User Qualifications to route leads to users based on established qualifications; Workflow Metrics to track how leads are being managed and make real-time adjustments to routing.

Why it Matters:
Streamlines the lead routing process, connecting leads with the best contact, to improve the customer experience.

Total Expert for Consumer Direct

Description:
Total Expert for Consumer Direct gives lenders essential tools to build a better consumer direct experience – from first contact to long-term retention and customer loyalty.

How to Enable:
Speak to your Customer Success Manager for more information.

What it Does:

From first touch for leads entering the system, the Workflow Engine automates the lead distribution process to ensure that leads are placed in the hands of the best available loan officer.

Once leads are assigned, the Communication Package enables rapid outreach to enable that specific loan officer to be the first to connect with that specific lead. The two work together to ensure that if the best available loan officer is not able to connect with that customer, they are passed on to the next available and qualified loan officer to ensure maximum efficiency and conversion.

Total Expert for Consumer Direct also includes access to the industry-leading CRM and customer engagement tools in the Total Expert Platform, including intelligent automation to personalize at scale; prioritized contact lists based on business goals; and reporting and dashboards to analyze performance.

For more information about Total Expert for Consumer Direct, visit our website.

Why It Matters:
In today's digital lending environment, it's not about being the first to contact – it's about being the first to connect. With more consumers starting their homebuying journey online, lenders need to have the right tools in place so they can quickly respond and meet their needs.

Custom Field Enhancements

Description:
Enables creation of custom fields and setting of display visibility for those fields. Custom fields can be created for Contacts, Loans and Products.

How to Enable:
This feature is automatically enables for Admins. *For more information on how to access, please contact your Customer Success Manager.*

What it Does:
Allows admins and marketers to create and determine visibility of contact, loan, and product custom fields. Sales teams can then view these fields via the contact details page.

Why it Matters:
Custom fields creation enables Marketers to create and utilize unique, use-case specific data to inform marketing strategies and empower sales teams to leverage the information to personalize customer interactions.

Custom Field and Product Filters on Contact List

Description:
Filter by any custom field on a contact, loan, or product – including core banking data – so this information can be leveraged to inform customer communications.

How to Enable:
This feature is automatically enabled for all organizations. For more information on how to access, please contact your Customer Success Manager.

What it Does:

Customers who are using their own unique fields or banking customers leveraging core banking data in Total Expert can filter their contact lists by those fields within the Contact List page and Campaign Builder to identify audiences and personalize communications.

Why it Matters:
Any user leveraging Total Expert can identify audiences using bank-specific data within their contact lists. Additionally, mortgage loan officers leveraging custom fields can segment their contacts by custom contact and loan fields.

Email Builder: Disclaimers Enhancement

Description:
Within Email Builder, a user can now add additional disclaimers or override existing disclaimers.

How to Enable:
This feature will be auto enabled for all users who have the new Email Builder. Some historic email footers will need to be updated in order to use this feature. *For more information on how to access, please contact your Customer Success Manager.*

What it Does:
Allows for much easier and efficient edits to email disclaimers. Users no longer need to edit code to add unique disclaimers. All disclaimers created in the disclaimers tab are hosted in Email Builder. This selection will show up when a user clicks on a content block that contains an email signature (also referred to as a snippet or liquid logic).

Why it Matters:
Users no longer need to edit the html source code hosting a unique disclaimer. This saves time and makes creating and utilizing unique disclaimers by recipient easier.

Journey Usability Improvements

Description:
Usability improvements to the Journey Canvas – including one-click undo/redo functionality, Journey status condition, and expanded preview capability – to simplify Journey creation and editing.

How to Enable:
By clicking edit, view, or create, the user will be redirected to the new journey canvas. Note that users will continue to have the option of returning to the old journey canvas.

What it Does:
These features revamp the look and feel of the Journey canvas editor, add flexibility in creating experiences and add clarity to the editing process.

Why it Matters:
Makes it easier than ever to build, edit, and deploy Journeys with confidence.

Journey Time Processing Windows & Day of Week Delay

Description:
The Day of Week Delay allows users to set deployment of Journeys on specific days of the week, while time processing windows allows users to set and update Journey timer delays to only advance customers along the Journey within certain windows of time.

How to Enable:
This functionality will be available by default to all users with access to create and edit Journeys.

What it Does:
Gives users more control over the timing of their Journey touchpoints.

Why it Matters:
Empowers users to ensure their communications are sent at the ideal times to drive engagement, conversions and remain compliant with regulations and best practices.

Product and Custom Field Filters for Campaign Builder

Description:
All products are now available for use in Audience Builder when creating campaigns, as well as all custom fields on products, loans and contacts.

How to Enable:
Filters will appear dynamically based on the fields associated with the organization of the viewing user.

What it Does:
Create rich and personalized filtering with custom dates and fields relating to loans, contacts, and products.

Why it Matters:
This feature unlocks the use of Campaign Builder because it allows the marketer to seamlessly define their audience using any standard or custom data point on customers and their products directly in the Total Expert user interface.

Transfer Loans and Contacts

Description:
Transfer selected loans and associated contacts from one user to another within your organization.

How to Enable:
The feature will be automatically enabled for Administrators/Marketing Administrators for the Fall 2021 Release. Clients can enable the transfer feature for additional roles by granting additional permission to more users.

What it Does:

Allows for the transfer of loans and all contacts associated with those loans from one user to another, the ability to group contacts, prevent duplication and lifts the limit on the number of contacts that can be transferred.

Why it Matters:
Gives organizations greater control and ownership of their own data to ensure a consistent customer experience when account/relationship management changes occur and/or to optimize the likelihood of conversion via strategic assignment of leads/loans.

Fall Release Customer Webinar

We are excited that our latest quarterly release will be available for our customers on Wednesday, Oct. 27 with more exciting innovations to follow.

To get more information about what is included and see it in action, we will be hosting a customer webinar on Wednesday, Nov. 3 at 12 p.m. CT to provide more detail around how we are helping you engage when it matters.

If you are interested in attending, please register here.

Note: If you are unable to attend, we recommend that you register so you can receive the recording afterwards.

Product Ideas Community: Reminder

Are you an Administrator with ideas that will make the Total Experience Platform even better? We want to hear from you!

Our new Product Ideas Community is an online portal that allows Administrators to submit, collaborate, and vote on product ideas that will help shape the Total Expert Product Roadmap.

Reach out to productideas@totalexpert.com to gain access today!

Please contact your Total Expert Customer Success Manager with questions.

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