Product Release Spring 2021 – Release Notes
General Availability: April 28, 2021

This release includes:

Adwerx Integration

Description:
Seamlessly extend communications to include digital ad campaigns from Adwerx with brand compliant and hyper-targeted messaging to groups from the Total Experience Platform.

How to Enable:

- Connect with your Adwerx representative to enable the Adwerx Integration after the release on April 28.

What it Does:

- Leverage groups in the Total Experience Platform to target Adwerx personalized advertising campaigns.
- Empowers efficiency by eliminating manual processes and work across teams.
- Extends targeted multichannel campaigns with the ability to create social, TV, and web ads via Adwerx.

Why it Matters:

- Allows your loan officers to extend their reach to contacts with the option to deploy branded, personalized ads to complement other marketing and sales activities that are conducted within the Total Experience Platform.

Budgeting

Description:
Enables a budget allocation process for admins, making it easier for loan officers to make in-platform purchases.

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How to Enable:

- For more information on how to access, please contact your Customer Success Manager.

What it Does:

- Efficiently deploys, adjusts, and manages user-level budgets across the organization in just a few clicks.
- Empowers loan officers to track and manage to assigned budgets, making it easier for them to leverage print services.
- Provides essential visibility into spend with easy-to-use reports, including a detailed transaction ledger.

Why it Matters:

- Allows your loan officers to quickly and easily use budget for marketing purposes (e.g., print and order flyers for a new rate promotion), allocated by your marketing admin, from within the Total Experience Platform.

Data Importer

Description:

Easily upload new contacts, loans, products, users, and associated data with our fast-as-lightning Data Importer meaning that users can deploy campaigns faster than ever before.

How to Enable:

- For more information on how to access, please contact your Customer Success Manager.

What it Does:

- Map, upload, and track data within the Total Experience Platform.
- Gain essential visibility including quality of upload data, import status, and saved uploads for access later.
- Get to work faster with a simple user interface and process that takes a few clicks from start to finish.

Why it Matters:

- Easily keep your contacts and other data up to date with the ability to upload contacts, loans, products, users, and associated data so you can get to market faster.

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Enhanced Reporting

Description:
Gain deeper insights with access to the entire standard report library plus six new reports to empower teams with a better view into engagement and performance.

How to Enable:

- Enhanced Reporting will be automatically enabled for all admins beginning April 28. Weekly reports will be available starting April 20, 2021 and monthly reports will be available after May 2, 2021.

What it Does:

- Empower a results-driven culture with extended visibility into key performance indicators within marketing campaigns.
- Access all standard reports from the Total Experience Platform user interface, empowering users to dig into performance at a deeper level.
- Understand Journey performance with four new reports that detail assets, leads, and performance.

Why it Matters:

- Allows you to quickly access performance reports to gain deeper insights and improve your marketing efforts.

Faster and More Flexible Contact Lists

Description:
More effectively organize your work and find customers with an updated user interface.

How to Enable:

- The new contact list features will be automatically enabled for all users beginning April 28.

What it Does:

- Locate contacts faster and more efficiently.
- Drill into data you need with streamlined views, easy-to-use drag-and-drop functionality, and customizable lists.
- Empower efficiency with list configurations for quick future access, which makes it easier than ever to access the data you need.

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Why it Matters:

- Allows your loan officers to quickly pull lists of contacts based on specific criteria (e.g., loans closed within a certain period of time and/or within a specific geographic area), and then save those lists for future use – with automatic updating based on the saved criteria – to leverage for marketing purposes.

Landing Page Enhancements

Description:
Enables the use of third-party landing page analytics solutions in conjunction with Total Expert campaign and content management features, plus a simple way to add or update the policies shown on your pages.

How to Enable:

- Landing Page Enhancements will be automatically enabled for all users beginning April 28.

What it Does:

- Understand contact engagement by adding Adobe or Google tracking pixels.
- Gain visibility into conversion data to fuel future marketing campaigns and investments.
- Meet legal requirements and build trust with page visitors by including corporate privacy and data policies.

Why it Matters:

- Improves Single Property Sites and Lead Capture Apps with the ability to add tracking, and privacy and data policies.

Lead Intake Logic
Available on June 2, 2021

Description:
At the core of our lead distribution functionality, Lead Intake Logic applies automation rules for leads as they enter the system to align with sales follow-up initiatives and priorities. Leads are entered into the system via manual input or with our new Data Importer.

How to Enable:

- Lead Intake Logic will be available to Admin users on June 2.

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What it Does:

- Defines how to bring leads into the system with an easy-to-use interface that provides routing, deduplication, and assignment rules for the lead source.
- Leverages automation to transform follow-up for new leads, instead of waiting for manual re-assignment.
- Empowers sales with enhanced lead views to improve follow-up and sales outcomes – making teams more productive and efficient.

Why it Matters:

- Makes your team more productive and efficient with enhanced lead views for improved follow-up and sales outcomes.

SMS Status Change Journey Trigger

Description:
You are now able to trigger journey workflows when customers opt in or out of SMS.

How to Enable:

- SMS Status Change Journey Trigger will be automatically enabled for all admins beginning April 28.

What it Does:

- Builds better customer relationships by automating alignment with communication preferences.
- Advances segmentation and targeting based on contact preferences.
- Automatically updates outreach channels based on changes to customer preferences.

Why it Matters:

- Quickly react to customer preferences with SMS opt-in and opt-out triggers on any Journey.

Please contact your Total Expert Customer Success Manager with questions.

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