Product Release Summer 2021 – Release Notes
General Availability: July 28, 2021

General Availability Features/Functionality:

- *Configurable Product Panel*
- *New Email Builder*
- *RatePlug Integration*
- *Sending Profiles*
- *Total Expert for Salesforce*
- *TrueIntent*

Fast Follow Features/Functionality:

- *Enhanced Journey Canvas Editor*

Consumer Direct Features/Functionality:

- *Communications Package*
- *LendingTree Integration*
- *Workflow Engine*

Announcements:

- Important Update to MLS Feeds
- Summer Release Customer Webinar
- Product Ideas Community: Reminder

General Availability Features/Functionality

Configurable Product Panel

Description:
The configurable product panel enables administrators to choose which products and fields for those products they want to display within the product panel on the contact details page. Mortgage focused organizations can use this feature to make additional loan fields visible to their loan officers on the contact details page.

How to Enable:
Configurable Product Panel will be automatically enabled for all admins beginning July 28.

What it Does:
Allows Admins to customize what information/data is displayed within the product panel.

Why it Matters:
Makes it easier for end users to see a contact's financial products within the contact details page to identify opportunities for additional product suggestions/promotion.

New Email Builder

Description:
Intuitive email creation and editing tool that allows users to create and edit responsive emails using a drag-and-drop builder to easily add text, images, buttons, and videos.

How to Enable:
New Email Builder will be automatically enabled for all admins beginning July 28.

What it Does:
Provides drag-and-drop builder functionality – no HTML coding necessary – access to ready-made stylesheets, content blocks, and a template gallery containing Expert Content, as well as the ability to add video and custom email signatures directly into emails.

Why it Matters:
Makes it easier and faster than ever to create robust and dynamic email communications in the Total Experience Platform.

RatePlug Integration

Description:
Enables ingestion of RatePlug contacts and insights into the Total Experience Platform.

How to Enable:
For more information on how to access, please contact your Customer Success Manager.

What it Does:
Automatically syncs RatePlug contacts, borrowers and agents with Total Expert and provides detailed insights for actioning.

Why it Matters:
RatePlug contact information and Insights can be utilized to personalize and tailor communications within the Total Experience Platform.

Sending Profiles

Description:

Provides the flexibility to customize sender details on email communications to add a human connection or to seamlessly layer brand-level communications.

How to Enable:

Sending Profiles will be automatically enabled for all admins beginning July 28.

What it Does:

Enables customization of sender details – such as the From Address - on email communications sent via Journey Creator and Campaign Builder.

Why it Matters:

Provides intuitive communications to customers with an additional tool for personalization at scale and streamlines marketing with the ability to send emails from one account on behalf of many users.

Total Expert for Salesforce

Description:

Combines the strengths of the Total Experience Platform and Salesforce into one solution to create growth, drive customer loyalty, and ultimately build a better customer journey for borrowers.

How to Enable:

Available on the Salesforce AppExchange; For more information on how to access, please contact your Customer Success Manager.

What it Does:

Instantly syncs contacts, accounts, and loan data from Salesforce to Total Expert, and engagement data from Total Expert to Salesforce.

Why it Matters:

Improves overall customer experience for a truly connected journey and drives productivity from a single platform with the ability to access the Total Experience Platform from within Salesforce, giving loan officers actionable data to drive conversions.

TrueIntent

Description:
TrueIntent gathers zero-party data from consumers to understand where they are in their financial journey.

How to Enable:
For more information on how to access, please contact your Customer Success Manager.

What it Does:
Create rich and personalized web and mobile experiences that provide the ability to capture zero-party and motivational data directly from consumers within the Total Experience Platform.

Why it Matters:
Allows you to use information received directly from customers to inform and guide how you communicate to those customers.

Fast Follow Features/Functionality

Enhanced Journey Canvas Editor

Description:
Streamlines Journey creation with a simplified and intuitive user interface and recommended actions and events.

How to Enable:
This feature/functionality is a fast follow to the Summer Release and is targeted for general availability in early August.

What it Does:
Simplifies how end users build, edit, and deploy always-on nurture campaigns in Journey Creator, including automated suggestions for the next step in each journey.

Why it Matters:
Makes it quicker and easier to build Journeys that trigger the right communications via the right channels.

Consumer Direct Features/Functionality

Communications Package (Live in Limited Beta)

Description:
Quickly connect with leads and contacts through phone and SMS text messaging. Manage outbound outreach directly from the Total Experience Platform while tracking communications history for a complete view of customer engagement.

How to Enable:
This feature/functionality is part of our new Consumer Direct offering and is currently in beta.

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.

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

LendingTree Integration (Live in Limited Beta)

Description:
Enables the ingestion of LendingTree lead data into the Total Experience Platform.

How to Enable:
This feature/functionality is part of our new Consumer Direct offering and is currently in beta.

What it Does:
Ingests comprehensive lead data from LendingTree to the Total Experience Platform.

Why it Matters:
Informs a personalized consumer direct experience that resonates with potential borrowers and drives more conversions and ensure you capitalize on your lead investments.

Workflow Engine (Live in Limited Beta)

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:

This feature/functionality is part of our new Consumer Direct offering and is currently in beta.

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.

Announcements

Important Update to MLS Feeds

To make it even easier to use Total Expert, we are excited to announce that we are transitioning our MLS feeds to a new provider called Constellation. This will make it easier than ever to get the data you need to create a seamless user experience.

FAQ's Surrounding the MLS Transition to Constellation:

What is Constellation?

- Constellation is an MLS technology aggregator that standardizes MLS data feeds allowing us to onboard new feeds faster and deliver a more consistent experience through the Total Expert Platform.

Why are we moving to Constellation?

- Get your new MLS feeds up and running faster - no more 45-60 day wait!
- Access to more data – since the data is standardized, we can provide more data points across all MLS feeds.

When will this be happening?

- All new MLS feeds will be added using Constellation starting at the end of July. Over the next 90 days, Total Expert will also be transitioning existing MLS feeds to Constellation and notifying users when each MLS is transitioned.

What if I don't see my MLS or notice an interruption of service?

- Please reach out to MLS@TotalExpert.com

How can I help/What is needed?

- We are required to work with a Real Estate Broker to acquire any MLS data feeds. The MLS team may be reaching out to partner with you to secure a co-marketing partner broker to establish an MLS connection.

Should I reach out to the MLS with questions?

- No, please work with our MLS team (MLS@TotalExpert.com) on any issues/questions you may have.

Summer Release Customer Webinar

We're excited that our latest quarterly release will be available for our customers on Wednesday, July 28 with more exciting innovations to follow.

To get more information about what's included and see it in action, we'll be hosting a customer webinar on Wednesday, August 4 at 12 p.m. CT to provide more detail around how we're helping you engage when it matters.

If you're interested in attending, please register here.

Note: If you're 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 ultimately 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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