2013

VIP RELEASE NOTES

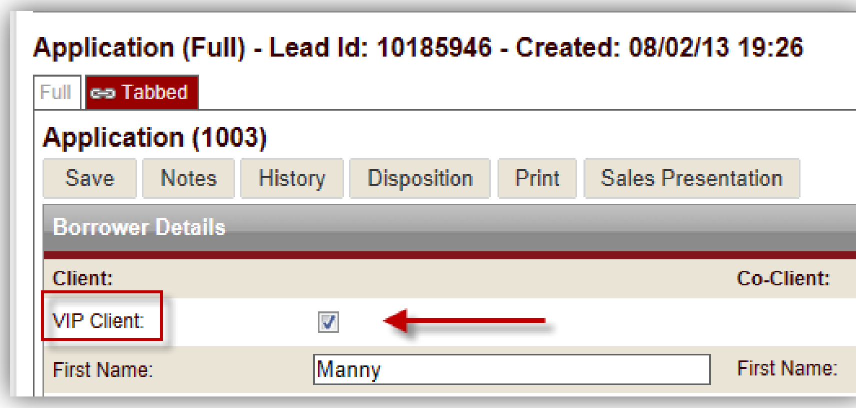
Release 10 – August 2013

VIP Contact Indicators

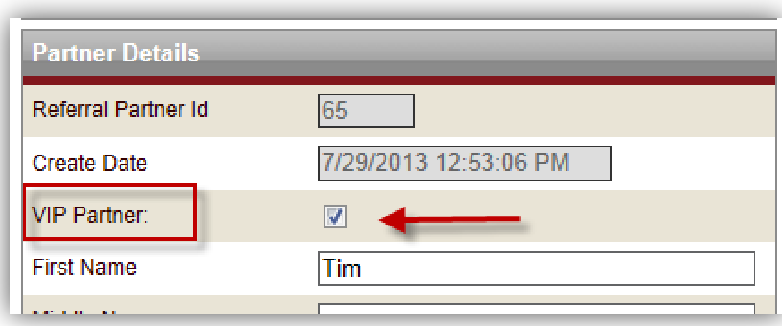
VIP Contact Indicators allow loan officers to categorize their contacts as VIP or Non-VIP. These indicators can later be used to develop targeted marketing plans to contacts of different levels.

VIP in the CRM

VIP indicators have been added to lead, borrower and referral partner profiles in the CRM.



When adding a new lead to the CRM, you can designate the lead as a VIP Client. This designation will stay with the contact through the entire loan process.

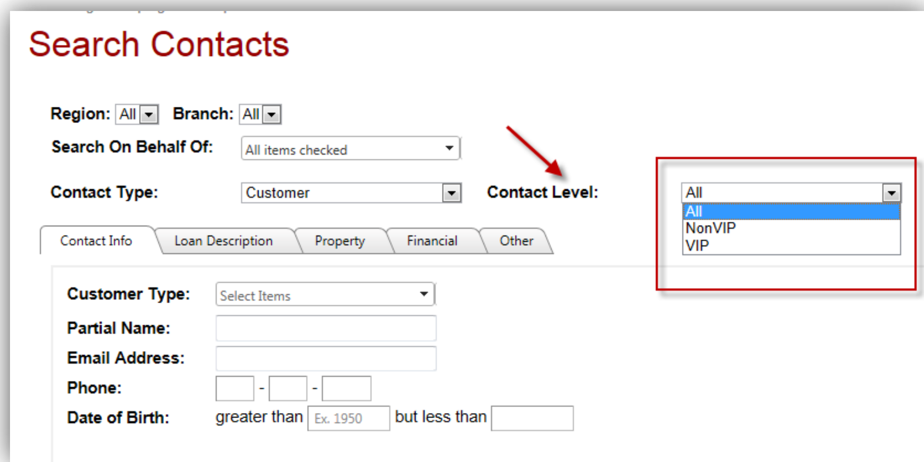


VIP in the Marketing Center

The implementation of VIP indicators in the CRM now allows you to market to leads of various levels (VIP, Non-VIP, or all leads) within the Marketing Center. The VIP indicators have been integrated with the following screens:

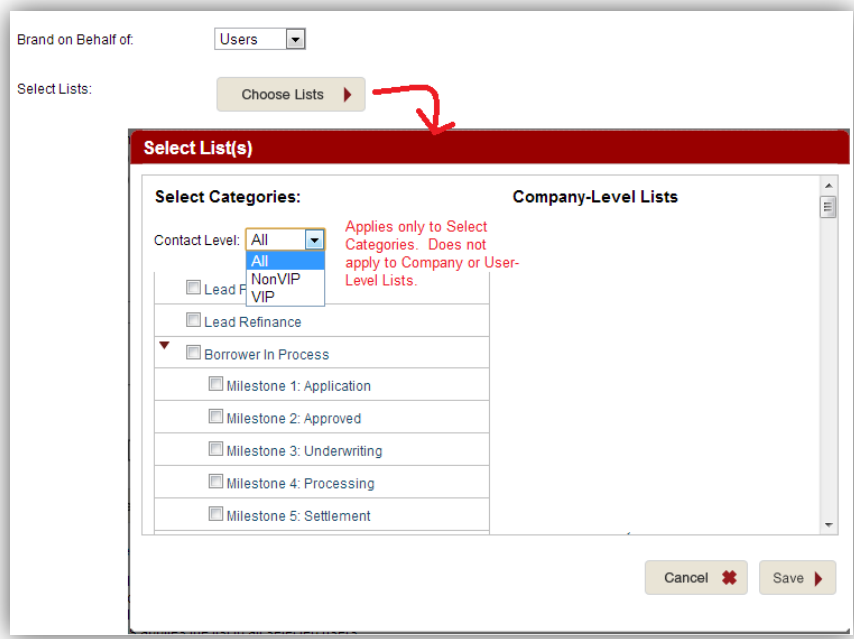
- ### Search Contacts

  Users can now search for contacts based on the VIP designation. Searches can be saved as static or dynamic lists and used to send ad-hoc materials or subscribe to single and custom campaigns. Click here to view additional changes to the Search Contacts page.

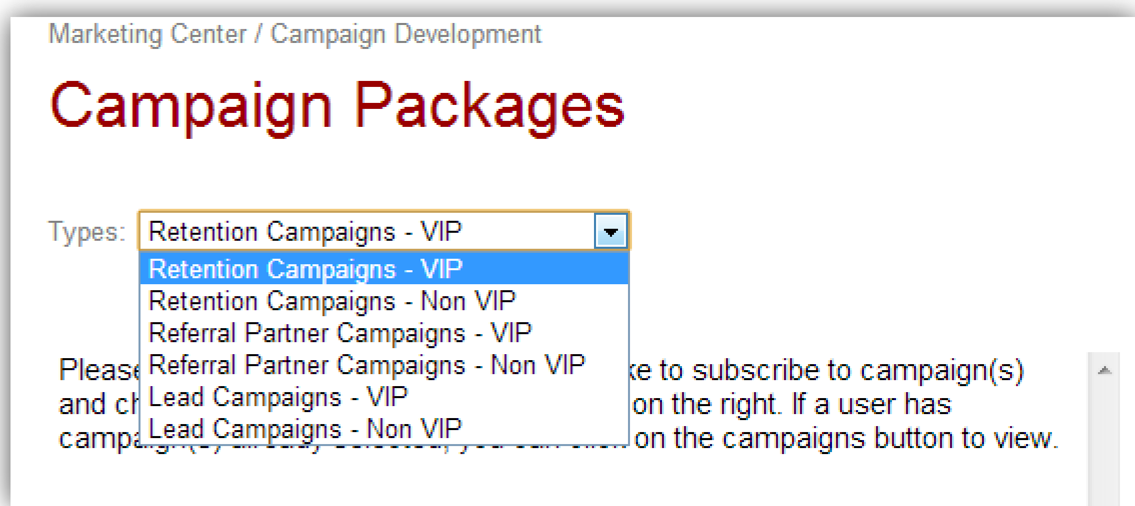


- ### Choose Lists for Ad-Hoc Marketing, Custom and Single Campaigns

  The VIP indicator has also been integrated with the choose lists functionality on the ad-hoc print, gift and email screens, as well as the custom and single campaign subscription screens. After selecting Choose Lists, users may specify whether they want to include VIP, non-VIP or all contacts for a particular category.

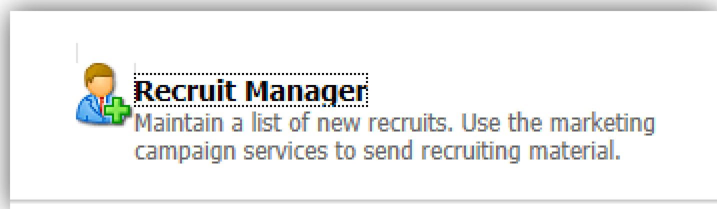


- **Campaign Packages**
  Campaign Package types have now been split into VIP and Non-VIP. While the same packages will be available to VIP and Non-VIP contacts, Loan Officers and Admins will now have the ability to designate a different campaign packages for each contact level (VIP/Non-VIP). Existing subscriptions (created prior to this enhancement) will be automatically converted to non-VIP and may be changed, if needed.

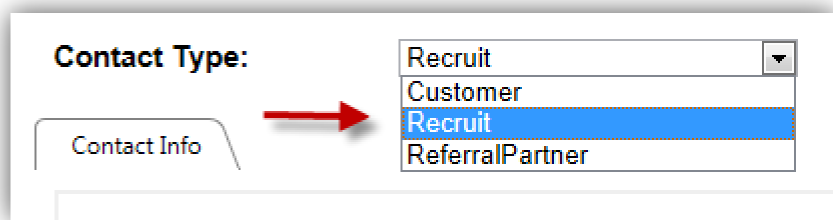


Recruit Manager

For users with the CRM Admin role, you can go to the Manage Dashboard screen and select Recruit Manager. Here you can add a list of recruits.

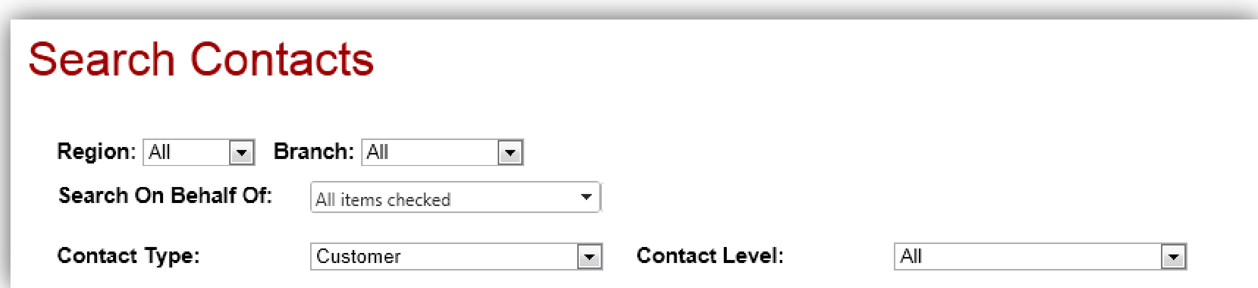


Then, from the Contact Search in Marketing Center, you can search for recruits, create lists and market to those lists:



Search Contacts

The search contacts screen has been enhanced to include more robust search capabilities.



Changes include:

- Filtering LO's listed in the *Search On Behalf of* list by **Region** or **Branch**
- Administrators now have the ability to **Search On Behalf Of** multiple users at one time

- **Contact Type** now includes customer, referral partner, and recruit
- The addition of a **Contact Level** filter, allowing you to search for contacts based on their VIP status. Options include searching for all contacts (VIP and non-VIP), VIP Contacts, or non-VIP contacts.

Compliance Page

In order to meet print guidelines, the following text was added to the compliance statement setup pages:

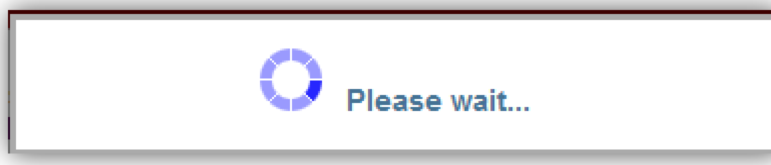
Please note that in order to meet postal guidelines, the sum total of ALL disclosures should be four lines of text or less (approximately 80 words) for print materials that will be mailed, postcards especially.

Single Sign-On

For VIP customers that have their own log-in site (for example, a company portal), we have create a service that can be used to pass-through authentication. Once the user logs into the company site, they can click on a VIP link and get automatically logged in – with their own roles and profile. To take advantage of this service, the customer's IT department will have to work with Vantage on a one-time setup.

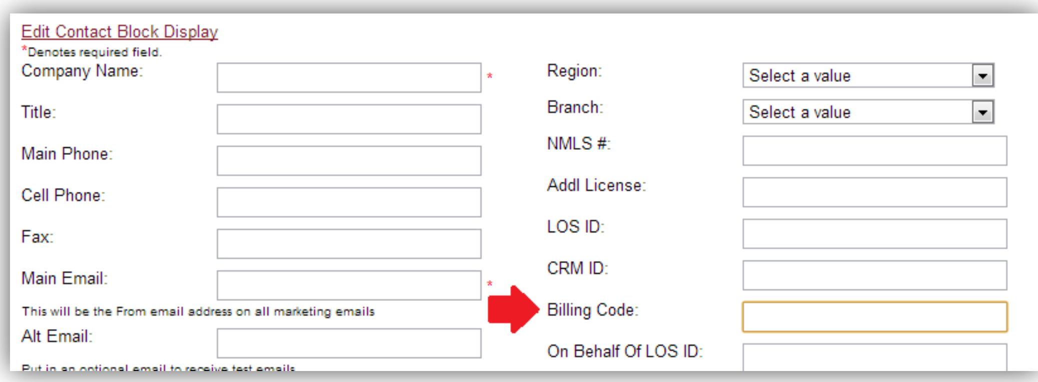
Wait Indicators

For pages that typically take a bit longer to load, we have added a page processing indicator.



Billing Codes

Within the Administration section of the application, each user profile now contains a Billing Code field. When populated, these billing codes will be included in monthly billing statements for billable ad-hoc and campaign usage, allowing banks to charge back usage to the appropriate Loan Officer.

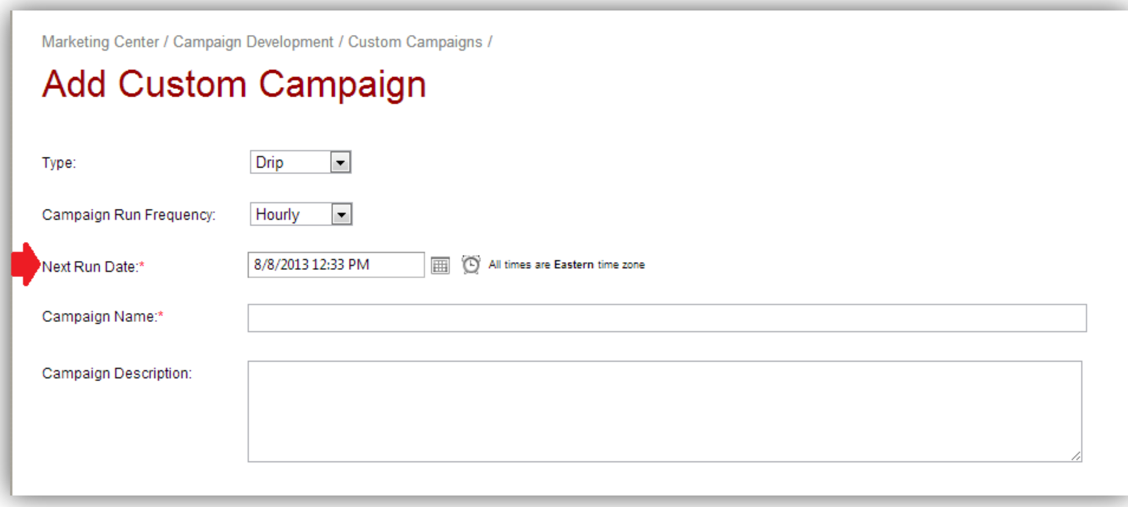


Eastern Time Zone Indicators

Next to each field where a time/date is displayed or selected, text has been added to indicate the time shown is Eastern Time.

Custom Campaign Next Run Date Validation

For custom drip campaigns, validation has been added to the next run date field. The date will automatically prefill this field with the current time/date, plus one hour. Users may change this time, but the system will no longer allow a time earlier than the default time.



Blank Template Edit Tags

Edit tags within blank templates have been updated to no longer produce an error when attempting to save a piece created from a blank template using one of the impacted tags.

Production Release 7-11-2013

4884: PROD: Send Print Notification Not Going to Notification Email Address

4882: PROD: Article tag for going to the main article is not working (YOU Magazine)

4881: PROD: replace the Indicia image with the one attached (for the Indicia print tag)

4880: PROD: Redirect links are not working when a user is logged into Vantage

4879: PROD: Choose Lists - Milestone selections result in automatic referral partner selections

4667: PROD: CKEditor 4 Changes Does not Resolve Templates Correctly

Single Sign-On

Vantage (VIP) Release Iteration 9

Enhancements

3695: Upgrade the CK Editor used in custom templates and in the Admin tool to the latest version (4.0)

4658: Update drip campaigns to recheck the users against the original criteria in every step of the pipe (OT 348).

4659: Change the print order process to merge contact information into the PDF and produce a single PDF file for each LO with pages for each contact (OT 253).

4660: Allow custom campaigns to run at a frequency of one hour (OT 349).

4674: Add a confirmation page after email, print or gift submit page (preventing the user from hitting submit more than once) (OT 387).

4682: In the Admin tool, add the ability to select whether a custom company logo will show up AFTER login (this applies to Marketing Center/Administration only).

4700: When an admin is subscribing users to a campaign or ad hoc email, instead of displaying ALL user-level lists only display the ones for the users being selected.

4704: Add an alert when the admin user is selecting lists to apply to all users.

4714: Change the from email address on order confirmation emails to orders@vantageproduction.com

4715: Updates to Social Media posting, to include the image in Facebook and the description (OT 356).

4719: For campaign setup in Admin, change the default to De-dupe campaign as checked.

4753: Change drop-down in content library (change MSS to Vantage)

4755: Add a label to the drop-down on the scheduled emails page (type:)

4757: Dynamic Sizing of User List on Manage Campaign Packages

4759: Add a Show Inactives checkbox on the Manage Users page (by default this will be unchecked)

4766: Replace the Vantage logo with the smaller image (OT 385).

4763: Add text on the Content Library showing the type of piece (digital, print or digital and print)

4771: Add a column in the Sent Gifts report for Gift Type (corresponding to the four gift types).

4773: Add a smart tag for Family Name that uses the borrower and co-borrowers combined full name.

4774: Add co-borrower first and last name to the gift fulfillment .csv file (OT 406).

4791: Add Linked In to the Share drop-down choices. Give the user the ability to post to LinkedIn in addition to Facebook and Twitter. (OT 161)

4793: Change verbiage on the Contact Us page to match the new company name (OT 427).

4805: Add a flag in admin for order types to be bulk print only. This will be used for pieces that do not have a mailing option.

4800: Add validation to check if a selected user is on a company list and display message accordingly.

4801: Change verbiage on Campaign Packages from ‘Anniversary’ to ‘Past Client’.

4813: Add a new sub-nav menu on Manage Sales for Presentation Archives.

4815: Add Help icon to link to content-specific Help pages (OT 362).

Fixes

4663: For csv list uploads – prevent the user from uploading a list with the same name as an existing list.

4664: Send Test to Me email was not including the email subject.

4698: Send Test to Me was displaying the from address as the username and not the user email address.

4703: Confirmation email was not pulling in the On Behalf Of user names.

4716, 4717, 1718: Fix partner campaigns in the Admin tool

4721: Revisions to Push campaigns in Admin tool (date display, etc.)

4743: Resize thumbnail on main Marketing dashboard to match the one on the Content Library

4745: Order Gift icon should not show if piece is not “approved”

4752: Update the home link on the logged in and logged out footer

4756: Change the fly-out pointer on the social media help on the profile page.

4758: Fix archive export error in Chrome

4762: Replacing an existing sales cover image produces an error

4839: Campaign LO should not see the user grid on the Manage Campaigns screen.

Mortgage Market Guide

Update to the smaller Vantage Logo

Update the administration sub-navigation menu (to match other applications).

Add Help icon integration

Release Notes – Iteration 7 (Release Date: 4/12/2013)

Notification Center

Notification Center for Front End Vantage:

- ALL users will have the notification center. There will be two Notification permissions: Notification Basic and Notification Admin.
- Notification Admins will be able to create and send notifications to ANY user or role within their company.
- Notification Users will be able to create and send notification only to Content Admin role.
- Both permissions will be able to view notifications.
- Notification Admins will be able to "forward" notifications. Forward will create a new notification on the Send Notification screen and copy all of the original notification's content (which can then be edited in the new notification).

Notification Center for Back End MSS in the Admin Tool:

- MSS will be able to send notifications to all companies by selected Role(s)
- Any MSS notifications will show for ALL users with that role – across ALL companies.
- MSS notifications will show as from the Vantage Team.

Changes to Edit and Copy

Fix the bug where copying a custom piece does not copy the content.

Issue: Create a new piece using a blank template. Come back to the Content Library and copy that piece. The issue is that none of the custom content gets copied (text or images). The copy is copying the original blank template when it should be copying the piece that the user created.

Change the way the Edit Content permission works.

Currently any piece can be edited by anyone with a role that has the permission *Edit Content Parameters*. Change this to the following: Only the user that created the piece can edit it (along with any user that has the Content Admin role).

Change piece ownership on Copy.

Once a user copies a piece, the ownership changes to the person who copied it (so that person can then edit).

Add a pop-up warning on Edit.

When a user clicks on the Edit Content or Modify Settings icons, pop-up a warning: Editing this piece will overwrite the existing piece. If you do not want to overwrite, then copy first and edit the copied piece. Click Continue to edit or Cancel to go back and copy.
Have a Continue and Cancel button. Continue will take the user to the edit page. Cancel will take the user back to the Content Library (the same category they were on)

Have the category on copy default to NULL.

Currently on Copy, the system defaults the category to the one that the piece came from. Change this so that the category is not set by default and will require the user to select a specific category before saving.

Ad-Hoc Gift Ordering and Updates to Print

Changes for Print:

- Change to allow the Content Admin user the ability to choose multiple users and their list. This would work exactly like the email.
- Allow the admin to order bulk quantity and input the quantity on each user. The system would calculate the total.
- FIX BUG: If company lists are chosen, the system should calculate the portion of that list that is for the selected users (currently it is taking the TOTAL quantity on that list, without regard to the users selected).
- Notification email: first the email address should default to the person placing the order. Second, we will send that person a notification confirming the order.
- Add Shipping for bulk orders. The system needs to calculate the amount of $10 per 500. This amount will show as a separate line item on the NetSuite sales order.

New functionality for Ad-Hoc Gifts:

MSS Admin Tool:

- Change Manage Print Types to Manage Order Types. Allow the users to input Gift types to associate to templates. Allow to indicate the type of messages and length of messages.
- On the edit template, change Print Type to Order type.

Vantage Front End:

- For any template with an Order Type equal to a gift, display the Gift icon on the Content Library when the template is made available.
- When the user clicks on the Gift icon, then will be taken to the Ad Hoc Gift order page (one for admin and one for user).

- The message boxes to display will be based on what is selected on the Gift Type Setup (Gift Message, Address Label Message, or neither).

Changes to Approvals on Push Campaigns

Change the approval mechanism for push campaigns

Putting the approval for push content at the admin level instead of the Manage Campaign level. This will be for all campaigns (single and group).

Permission/Role Changes

We need to break out permissions for Content Share, Content Print and Content Email.

Sales Presentation Basic Profile:

- Access admin and sales presentation sections
- Change password
- Upload individual photo
- Setup individual social media links

Removed: Edit background image, setup individual info, setup template color scheme upload individual cover image. This will only be available for the Sales and Presentation Executive role.

Marketing Basic Profile:

- Access admin and marketing
- Change password
- Search marketing center
- Setup individual social media links
- Upload individual photo
- View marketing reports

Removed: setup individual template color scheme, user info and upload logo. Combined some of the permissions from the Basic LO and remove this role. Only need one.

Changes on Custom Campaigns

Start Date - this would allow a user to setup a campaign and have people subscribe, but the first pipe run would not occur until this specified date.

Send Time - this would be the time of day that the pipe pull (and first Touchpoint) would run. For example: 3:00pm. So on 3:00pm the system will run the list pull and send out the first touchpoint. Then, on whatever frequency is set (let's say Daily), the system will always run it at that same time.

Note: One you are in the pipe, the additional touchpoints would run on the Days from schedule (as it currently does).

1) Add Custom Campaigns to the Type drop-down on the Administration -> Manage Marketing -> Manage Campaigns. If the user checks Available, then the campaign would show on the Manage Custom Campaigns page. If the campaign is not checked, it would not show on this page.

2) Remove the Is Active from thecreate or edit custom campaign. Instead, put a link on the page that goes to the Manage Campaigns in Admin, for making the campaign available. This link should open the page to the Type = Custom Campaigns.

Misc.

- Move Campaign Reporting from Marketing -> Campaign Development drop-down to Marketing -> Reports drop-down (put it at the bottom of the drop-down list).
- Remove the User Feedback link and form.
- When users are creating custom content, we need to add the following profile tags to the CK Editor drop-down, so the users can easily put those tags into their content:
    - Contact Block
    - Signature
- Change the From email for approvals, etc. Currently it is coming from Banking ToolBox <support@mss.vantageproduction.com> on behalf of VantageToolbox@ucg.com. Have it come from the Company Name and the email address of the user who submitted it for approval. This would be for approval emails, send to me emails, any emails that come from internal email server.
- Ability to delete an uploaded list or a list saved from the search screens.
- Searches from Contacts screen will need to be dynamic as well as static
- Change the layout of the approve/decline emails for submitted marketing pieces (make them HTML). The emails include links to the pieces.
- When content is awaiting approval, allow the approve admin to preview the content with the users information who created the custom marketing piece.
- Add a plug in for shortening the Twitter URL
- Changes to the user profile page layout.
- Change the vantage logo to go to Home IF the user has a role in CRM or to go to Marketing, if the user does not.
- On Edit Contact Block Display window, indicate they can choose up to 8 fields. Put in a message. Note that the 8 is in addition to the name, which is required.
- In the Admin Tool, add the Group Type selection to the Setup Campaign Groups
- Replace existing button images with new ones and replace links with buttons.
- BUG: fix archive report so that the icon opens the archived piece.
- Add a dynamic thumbnail for the BSA on the User Profile page.
- In the Admin Tool, change the template description from plain text to HTML (full CK Editor).
- BUG: The expand on the Scheduled emails (marketing dashboard) is in the wrong location.
- BUG: Changing categories on Suggested Campaigns needs to update the text on the page.

Release Notes – Iteration 6

ITL Integration

- Search is now hooked up to the ITL data warehouse.
- ITL has been added as an application with its own roles.
    - ITL user setup link in the Manage Users edit screen.
    - Marketing emails report in the ITL note section.
    - If the user has an ITL role, they will be redirected to the ITL dashboard on login.
    - Add Manage Dashboard to the Administration sub-menu. This link goes to the ITL account controls.
- New roles for Contact search and list creation.
- Make sure that the username cannot be edited after initial creation of the user.

Campaigns and Ad Hoc Emails

- Allow users to subscribe to campaigns without the admin having to subscribe first.
- Allow admin to choose users for associated contacts when branding on behalf of the company.
- Campaign and Ad Hoc email categories are now hooked into the ITL data warehouse.
    - Milestones (for prospects) will be dynamic per company.
- Change the "from" email address: default to come from the associated contact's user, unless the email is sent branded on behalf of the company, then show from the company.
- Change verbiage on the custom campaign screen.
- Remove "update preferences" from opt out on emails.
- When adding content to the custom campaigns, do not show print-only pieces.
- Add a "select all" link for the user selection on ad-hoc emails.
- When selecting a list for a user, have the screen stay at the current location (and not jump back to the top of the page).
- Change verbiage on the send screen (add bullet points, etc.).
- Fixed campaign preview content link on touch points (was showing outside the pop-up box frame).

Misc.

- Add a PDF preview to the admin tool.
- Expand the archives report to include all contacts info (email address and/or physical address) as part of a csv file for each export.
- Add a new background image for BSA (the MSS image).
- Fixed issue so that MSS can add/update users in the Admin tool.
- Make the user drop-down list in the list upload section appear in alphabetical order.
- Change the logged out message to show only after the initial log in (for non-branded logins).
- Change the photo and logo upload to not compress the image (for better print quality).
- Update the width of the vantage working area to match BSA. Add a background color.
- Align the columns on the sent email screen.
- Change wording on the Print icon (from HTML to Browser). Make the icon drop-down go away when navigating off of the icon.

- Fixed in BSA: gets the latest user profile (logo, photo, cover image) whenever the application is accessed.
- Remove phone number from the footer. Make product links only show the products that the user has access to.
- Put validation on the email scheduler, to prevent user from inputting a date in the past, or not date.
- Align buttons on the campaign schedule pages.
- Changed the upload cover image (BSA) on the profile to match the image size from BSA.

Release Notes: Vantage Production System 2-13-2013

Master Opt Out List and Report

• Campaign Manager can upload a universal opt-out list. The email addresses on this list will be considered opted out of ALL emails (ad-hoc and campaign).

• A new report showing ALL email opt out addresses (from both the universal opt out list and from users that have clicked on the opt-out link from any email).

The ability to require multiple admins approve content

• Added a page in the Administration section: Manage Approvals.

• Check the box to require that any user with the Approve Admin role approve content in the Content Library before it is available for LO users. NOTE: This applies only to content in the Content Library, not to the initial addition of MSS content from Manage Content.

Archived content report

• View all archived content by LO User, Type (print, email, syndication) or Time Frame.

• Export content archive results to a zip file.

Limit content categories by user

• The Content Admin can make categories available to only certain users.

• Users who do not have access to the category will not see that category (or content within that category) in the Content Library.

Expanded user-created custom campaign functionality

• Campaign Manager can now create Drip and Fixed Date campaigns.

• Campaign Manager can schedule Drip campaign frequency.

• Campaign Manager can specify exact send dates for Fixed Date campaign touch-points.

• Campaign LO's can subscribe to Custom Campaigns themselves.

Other Enhancements and Fixes

• Allow the user with Corp Profile Admin to apply marketing color across multiple users.

• Validate that a new user has at least one role.

• Show all content in alphabetical order by piece name (in the Content Library and in Manage Content).

• Add a Send to Me test email function in the back-end admin tool.

• Add a new content profile tag for disclaimer.

• Add a new content profile tag for copyright.

• The ability for MSS Admins to pull back content when inactivating a template in the Admin tool.

• Add the Compliance Statements and Logos to the shared profile for integration with other applications.

• Add physical address to list upload. Lists with addresses can be used to order ad-hoc print.

• Change the name from Market Action to Mortgage Market.

• Add corporate-branded login pages.

• Add a List-Only flag to hide certain functionality from customers only using list upload.

• Add validation on scheduled emails that will not allow a user to schedule in the past.

• Add a new Vantage logo and updated the login page.

• Resize the Send Feedback link to match the My Profile link.

• Removed Credit-Challenged as a Lead Campaign suggested campaign choice.

• Have the Marketing Center new content order default to the last modified date of the piece (not the template).

- Add a logged out message to the log in page.
- Fix: Preview on Marketing Center home page was showing blank template without content. This was fixed.
- Fix: The Open House Flyer tag was not showing the column headers and data. This was fixed.
- Fix: Resized the pop-up on campaigns and emails so that it doesn’t cut off the buttons.
- Fix: In the admin tool, the calendar pop-up on campaign touch-points was showing behind the other pop-up and could not be selected. This was fixed.
- Fix: In Professional Development, users could not add images to custom content pages due to HTTPS. This was fixed.