Partner Control of Notifications

Last Modified on 10/14/2021 12:56 pm MDT

One of the more valuable aspects of SimpleNexus for partners is the ability to be updated on the progress and status of the lending process for their clients. This is done through access to high level loan details in the app as well as through notifications that are sent out as things progress.

Historically, partners have not had any configuration options for notifications outside of the all-or-nothing device controls (i.e. disable all notifications for the SimpleNexus App.) By default, partners are also included in lots of notifications for all of their clients. What this means is that by default, the SimpleNexus app can be very noisy for partners. Because we haven't given them controls, they are currently solving this frustration in several ways:

- Disable All Notifications for the app on the device
- Uninstall the app entirely and stop using SimpleNexus
- Contact their LO and complain and ask for support.

Permission -vs- Preferences - Ensuring Lenders have control of communication

Ultimately, the decision on whether or not to send out a notification or update should be one that lending companies and Loan Officers can decide and control. Likewise, the decision on whether or not a partner wants to receive a notification (if it is allowed) should be one that they can decide and control. By giving both parties a way to control the communication, lenders will be able to control things for compliance and policy, and partners can have the choice of what actions they would like to be notified of.

There are now 2 sets of feature flags for partner notifications (both of which can be configured in the UI):

LO Partner Notification Options	- These are the options that have always been there in the app. - These control what notifications are allowed to be sent out.
Partner Notification Settings	- Partners now have options in the app to configure which options they would like to receive and how. - This is their personal preference and settings

Partners Notifications and Multiple Servicers

Because partners can be connected to multiple servicers, and each of those servicers or lending companies can have their own setup for which notifications are allowed, this means it is possible the notifications a partner can receive may be different across their connected Loan Officers.

The Partner Notification Settings controls are aware of multiple partners and present a unified experience for partners to configure their notification preferences. When a partner configures the notifications they would like to receive, those choices are applied across all LOs and Clients they are getting notifications for.

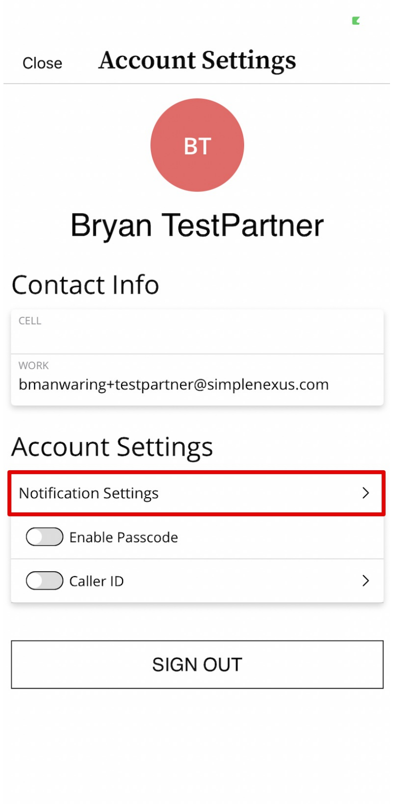
If there are any notifications that are disabled for all LOs they are connected to, these notifications will simply be missing from the settings screen.

Initially, it may be possible that they different notification options for different LOs. The first time they edit their notifications, however, we will update the settings across all LOs to be the same.

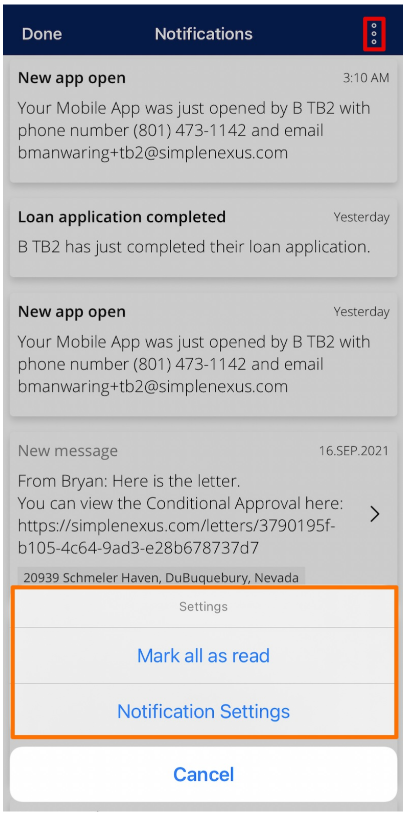
How does a partner configure their notifications?

Notifications can be configured from 3 locations:

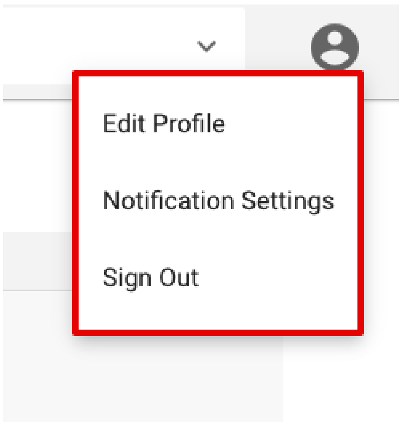
- Mobile App - From the Settings Screen in the sidebar menu.



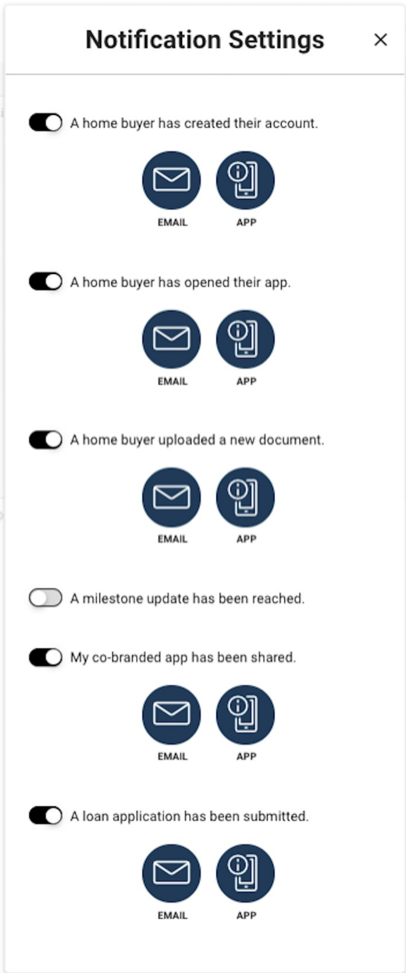
- Mobile App - From the 3-dot menu at the top of the notification screen.



- Web - From the "Notification Settings" option found in the avatar menu dropdown.



When you open "Notification Settings," you are shown a simple screen that lets you enable/disable different notifications and the method you want to receive them.



Click the toggle switch icon next to the notification type. This will turn on or off the notification entirely. To change the method of notification (in-app or e-mail.)

Partners can receive different notifications via e-mail, in-app notifications, or both. To configure which you would like to receive:

- Enable the notification (if disabled) to reveal the method options
- Click on the EMAIL or APP buttons to turn on or off those methods

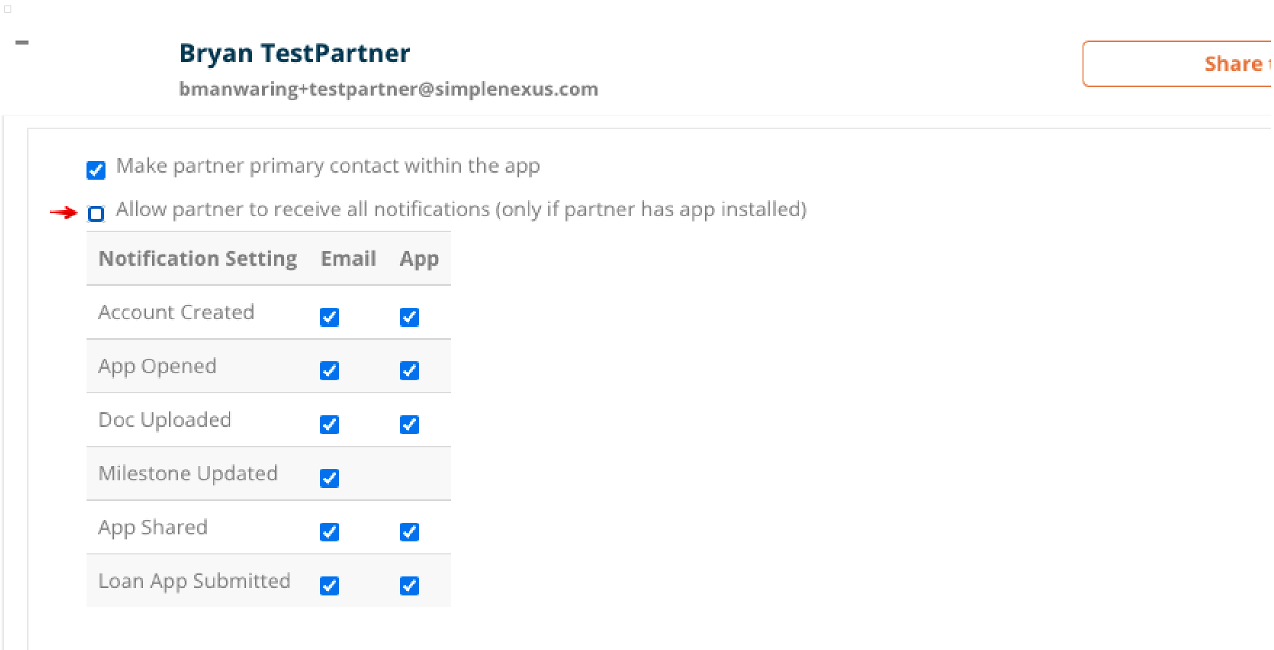
How does an LO control which notifications a partner is allowed to receive?

The controls for LOs look the same as they did before. The only difference is that partners now have options to disable/change the delivery of notifications they are receiving. The LO controls are configuring which notifications a partner is allowed to receive.

In the web interface, an LO can edit their partner settings by going to their partner page and expanding the partner they want to edit.

The checkbox “Allow partner to receive all notifications (only if partner has app installed)” if checked will enable all notifications for a partner. This is the default.

If you uncheck the box, you will see the available notification options and, if desired, disable specific notifications for the partner.



Frequently Asked Questions:

Why does a certain notification or delivery option not show up for my partner?

- The notifications partner can setup in the notification settings screen is based on the notifications that are available to them. If every LO the partner is connected to has disabled a specific notification, it will not be shown to the partner as an available option.
- If even one of the connected LOs has the notification available to the partner, then the option for it will be there to change.

> **Note: If an LO or company has disabled a particular notification, it will never be sent to the partner**
>
> **It may be possible that a partner has a notification available in the settings because one of their connected LOs allows it. This does not mean that the partner will**

receive those notifications. It simply means that the partner would like to receive them.

Ultimately, the company / LO setting for allowed notifications controls which notifications can be sent to the partner.