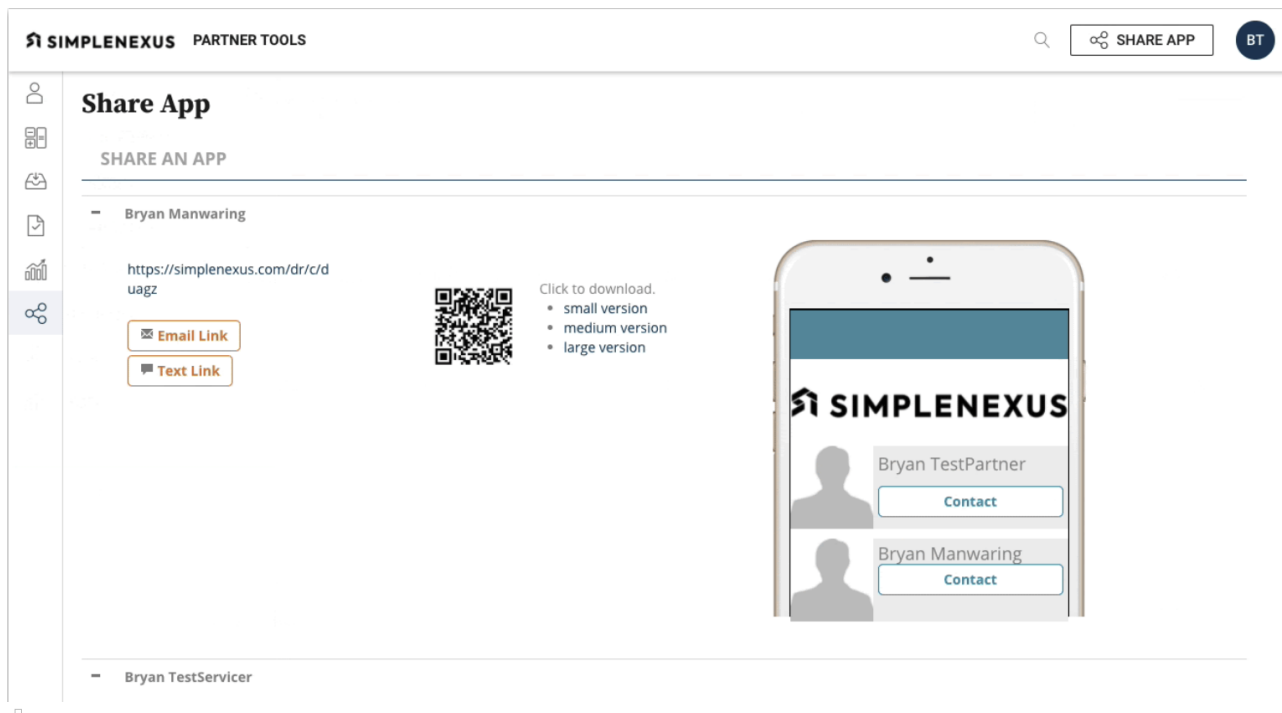


Partner Web Redesign

Last Modified on 10/01/2021 11:01 am MDT

The partner web portal has had an update to the overall experience with redesigned top and left navigation controls. The entire experience now matches our new SNUI designs and makes it easier to understand and navigate the site. The changes also more closely match the designs in the mobile application making for a more familiar experience.



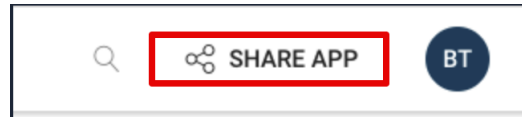
Walkthrough Video

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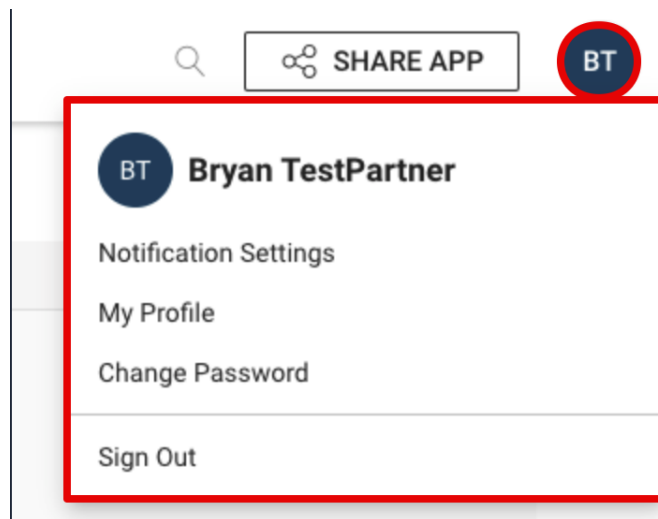
What's New

The top navigation is now branded "Partner Tools."

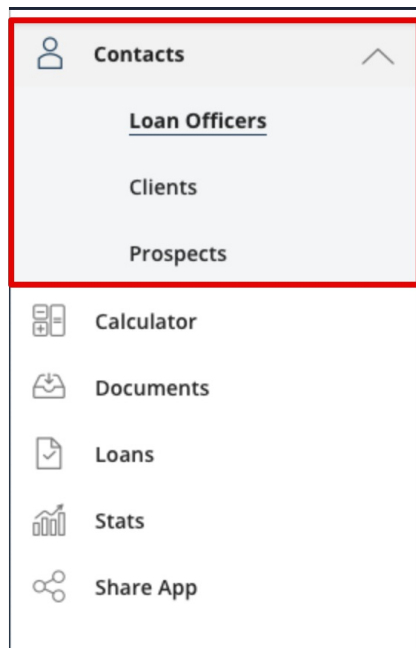
The share button now has a permanent home on the top right navigation bar, making it easy to know how to share the app with clients.



There is a new menu button in the top right that now shows the user's account profile picture. If they don't have a photo uploaded, it will instead show their initials. Clicking on that menu will pull up a list of options including configurations and settings such as "Change Password" or "Notification Settings."



We also redesigned the left navigation menu, which will now open each tab upon hovering over it. Different user personas (i.e. "Loan Officers," "Clients," and "Prospects") are organized under the "Contacts" menu item.



FAQ:

- Are there any limitations of the new design compared to the old version? - The only item that is missing in the new design for partners is that Push Groups is no longer included in the side navigation. Push groups have very very little usage by partners and it was decided to remove support for push groups in the new design.
 - I have enabled the setting, why is the partner not seeing it? - The experience for the partner is currently set based on the feature flag settings for the partner's default servicer. If it is enabled for an entire company, then the partner should see it. However, if it has only been enabled for a specific LO / Branch, then it is possible the Partner may have a default servicer that may not have that setting enabled. If this is the case, the partner can select a different servicer as their default servicers, or the feature flag can be enabled for the other servicer.
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