

The Key Release Notes – version 5.6

Client Portal Updates

Credit Report Link

The ability to place a link to a credit report provider has been added to the Client Portal. Currently this will offer a link to Noddle, as, of the three main credit reference agencies, they offer the ability for the client to download a PDF version of the credit report.

To enable the link, open the Client Portal Branding option through Setup > General > Online. When open, this functionality is managed through the ‘Credit Data Settings’ button.

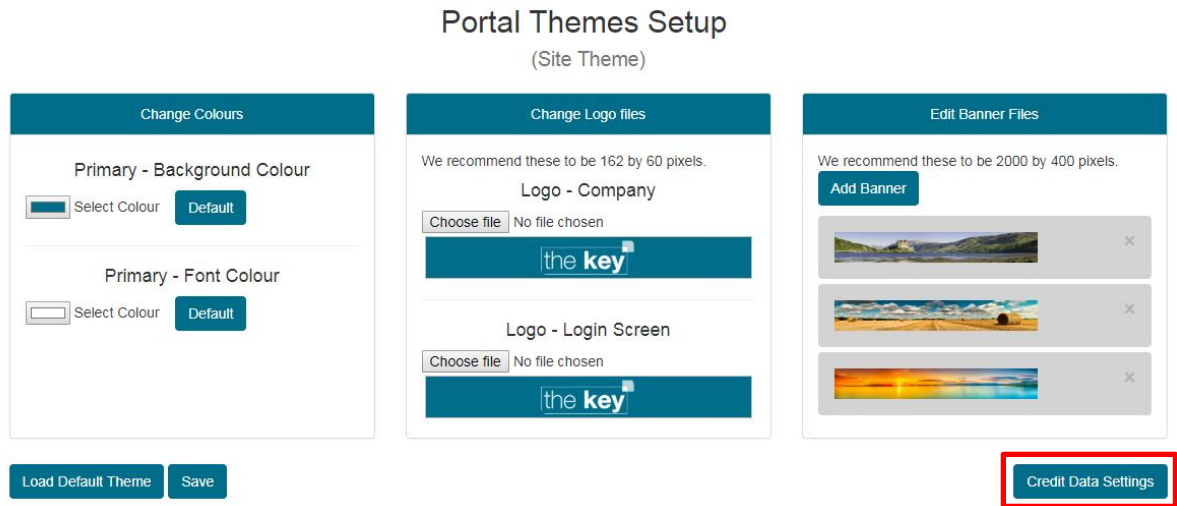



Figure 1: Portal Setup - Credit Data Option

Clicking on 'Enable Credit Data Settings' will allow the service to be displayed. Once enabled the link can be selected (this is to allow support for alternative providers in future), and explanatory text added. This will allow the user to customise the message provided to their clients to their own needs.

Credit Data Provider Configuration

Enable Credit Data Provider Links

 Enabled

Explanatory Text

Explanatory text to guide the client as required.

Save Cancel

Figure 2: Credit Data Setup

When enabled, the link will appear on the main page when the client logs into the Portal.

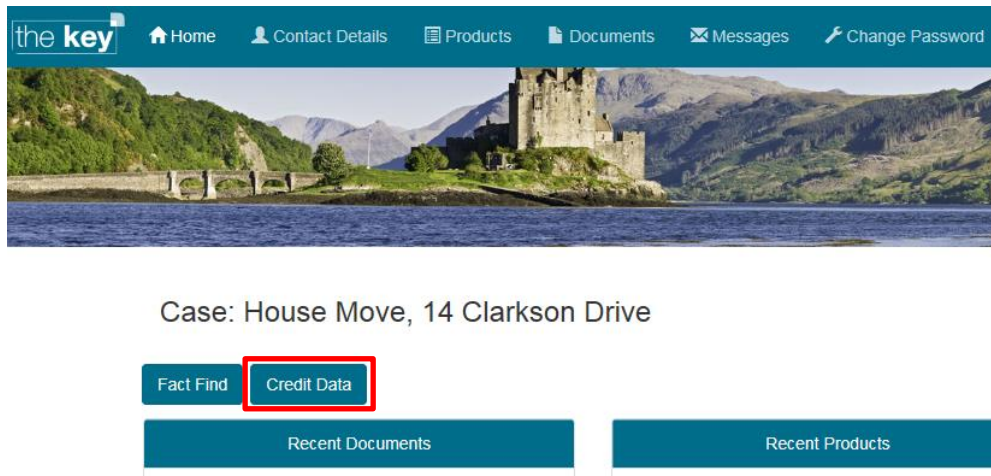


Figure 3: Credit Data Button

This link will open a window to allow the client to confirm the service to use, as well as the explanatory text, and open the credit service in another browser window.

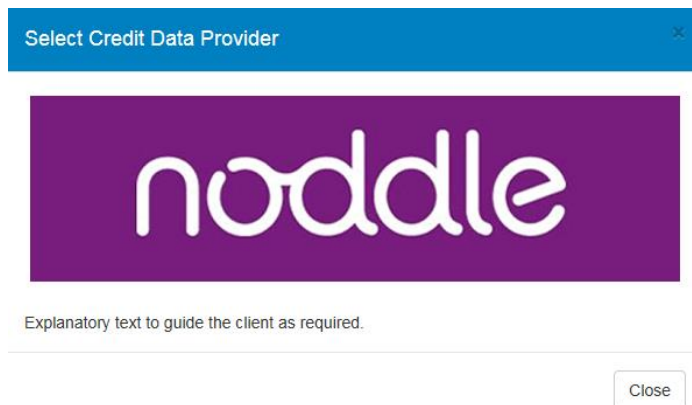


Figure 4: Credit Data Launch and Explanatory Text

Other Client Portal Enhancements

- Resolved issue with date picker where forward/backward navigation buttons were not visible
- Update to ensure customised logo used in the 'Update Password' screen
- Amended display of header text in 'Products' to ensure it is always visible
- 'Nationality' field added in Fact Find > Personal Details
- Changed order of 'Year' dropdown when recording dependant details
- Grammar correction on user message when client record is locked
- Text for 'Purchase Price' now changes to 'Valuation' if the loan purpose is Remortgage

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