PARTNER DASHBOARD

July 03, 2019

Client Feedback

PARTNER USER PANEL – DASHBOARD CLIENT FEEDBACK

BASIC LAYOUT ISSUES

fa-cogs

fa-bar-chart

fa-money

fa-trophy

Correct Icons are located in AdminLTE Font Awsome (FA) Font Set

28
Total Active Deals

$4.2M
Total Deal Amount

44
Total Funded Deals

89%
Deal Win Rate

24
Total Active Deals

$0
Total Deal Amount
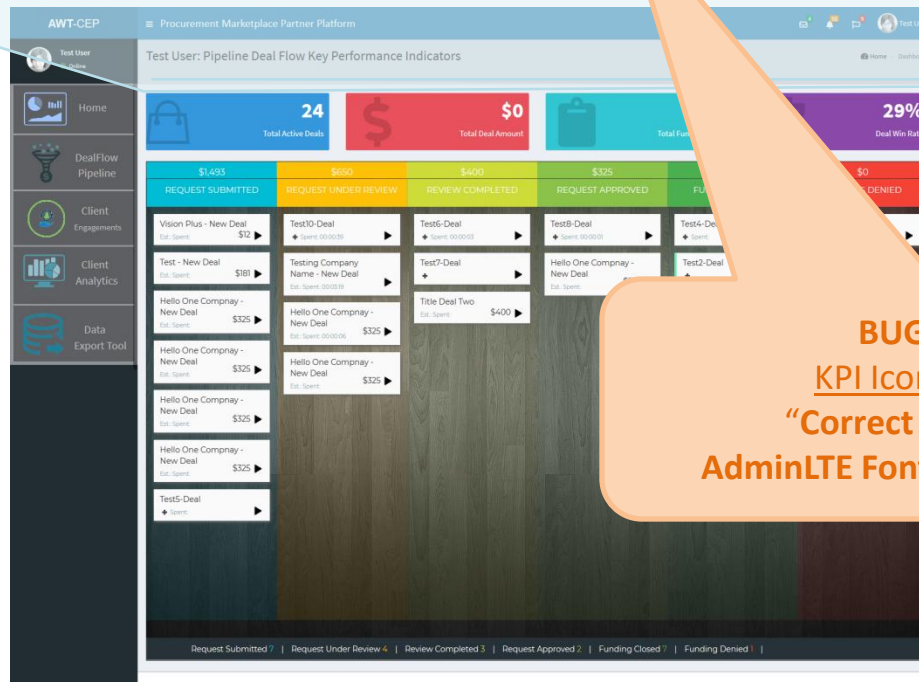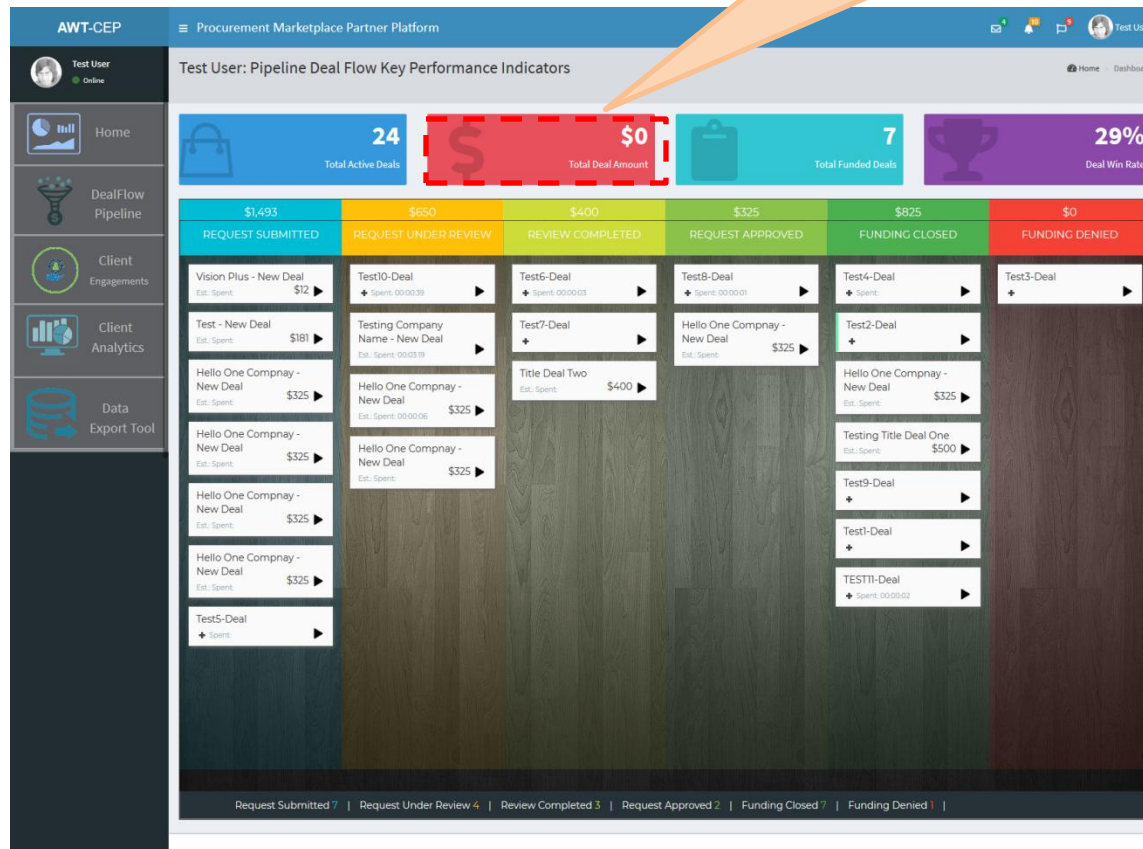
7
Total Funded Deals

29%
Deal Win Rate
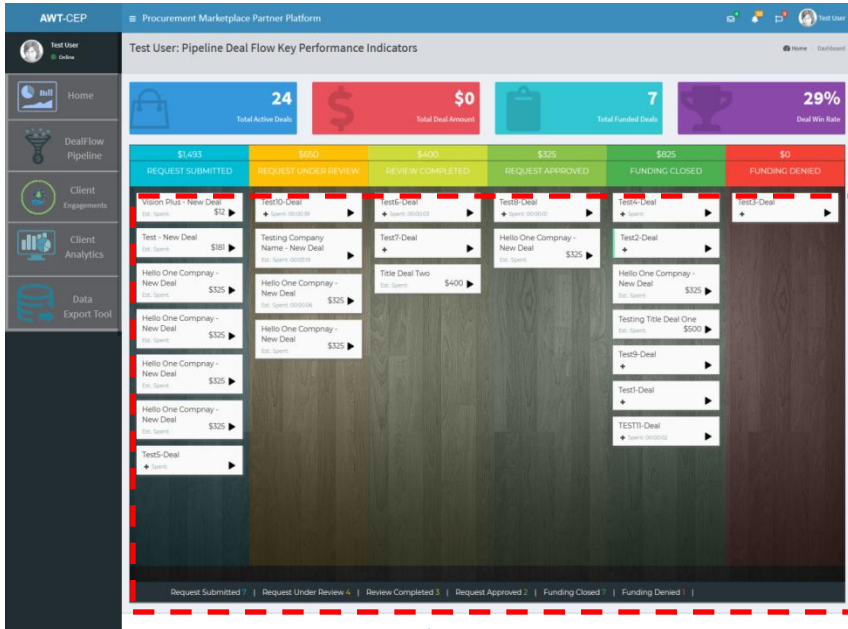
BUG-ID: 07-03-001
KPI Icons are INCORRECT
"Correct Icons are located in AdminLTE FontAwesome (FA) Font Set"
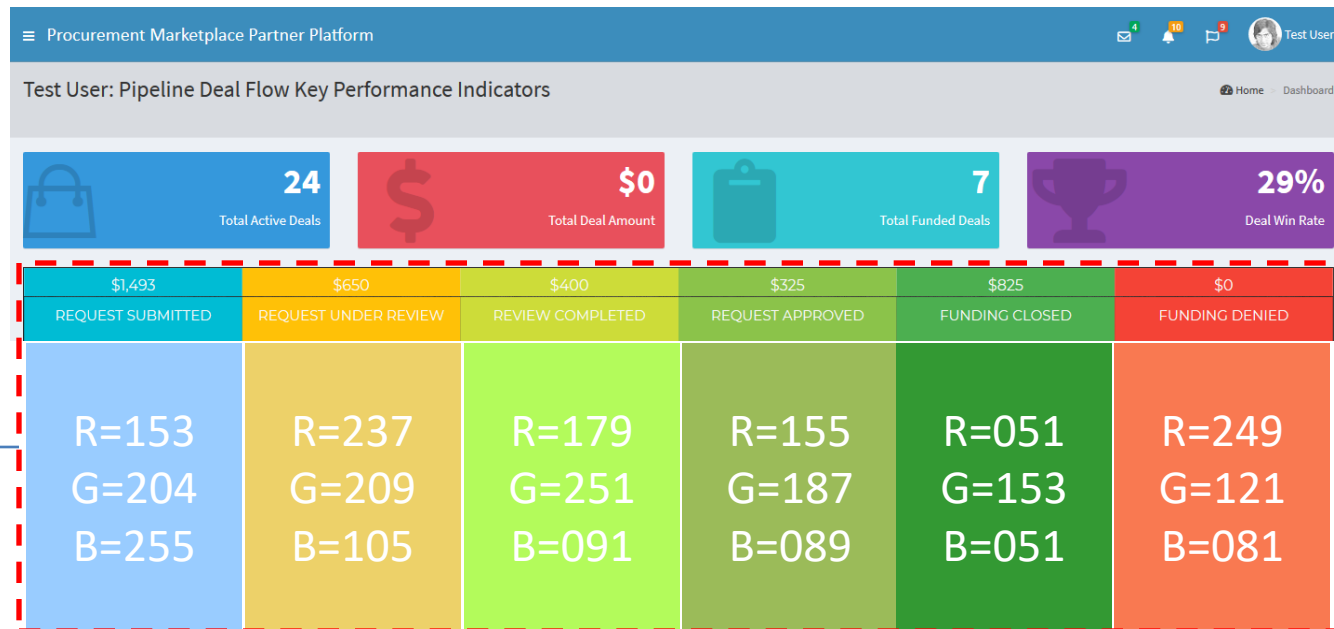
BUG-ID: 07-03-002
Total Deal Amount calculation is WRONG showing $0
Correct Calculation – Sum of All Deal Amount

UPDATE-ID: 07-03-003
Change TaskBoard "Container" (column) Background Color

$1,493	$650	$400	$325	$825	$0
REQUEST SUBMITTED	REQUEST UNDER REVIEW	REVIEW COMPLETED	REQUEST APPROVED	FUNDING CLOSED	FUNDING DENIED
R=153 G=204 B=255	R=237 G=209 B=105	R=179 G=251 B=091	R=155 G=187 B=089	R=051 G=153 B=051	R=249 G=121 B=081

AWT-CEP

Procurement Marketplace Partner Platform

Test User
Online

Test User

Test User: Pipeline Deal Flow Key Performance Indicators

Home · Dashboard

Home

DealFlow Pipeline

Client Engagements

Client Analytics

Data Export Tool

24 Total Active Deals

$0 Total Deal Amount

7 Total Funded Deals

29% Deal Win Rate

$1,493 — REQUEST SUBMITTED
$650 — REQUEST UNDER R...
$400
$325
$825 — ...NDING CLOSED
$0 — FUNDING DENIED

Vision Plus - New Deal
Est. Spent: $12

Test - New Deal
Est. Spent: $181

Hello One Compnay - New Deal
Est. Spent: $325

Hello One Compnay - New Deal
Est. Spent: $325

Hello One Compnay - New Deal
Est. Spent: $325

Hello One Compnay - New Deal
Est. Spent: $325

Test5-Deal
+ Spent:

Test10-Deal
Est. Spent: 00:00:59

Testing Company Name - New Deal
Est. Spent: 00:03:19

Hello One Compnay - New Deal
Est. Spent: 00:00:06

Hello One Compnay - New Deal
Est. Spent:

Test3-Deal

g Title Deal One
$500

Hello One Compnay - Deal
$325

Deal: Vision Plus - New Deal   Loan Amount **$12**
Created by: Admin One

Edit Deal | Attachments | Working periods

Title :

Vision Plus [J. Anderson]

Description:

This is the Contract Financing Deal for Vision Plus - Owner is Jame Anderson.

💬 **Add Comment**

TU   **Comment Title:**   Comment Title

Write a comment

Add

ToDo List :

Title...   Add

Time estimate: **Color :**

Request Submitted 7 | Request Under Revie...   ...ing Denied 1 |

BUG-ID: 07-03-004
"Cannot Change Deal (Task) Description or Title"

SAVE BUTTON DOES NOT SAVE NEW CONTENTS

UPDATE-ID: 07-03-005
"Add bizVAULT Access Tab"

Add Tab to access the User's bizVAULT Files and Documents

Deal: Vision Plus - New Deal   Loan Amount $12
Created by: Admin One

Edit Deal   Attachments   Working periods

Title :

Vision Plus [J. Anderson]

Description:

This is the Contract Financing Deal for Vision Plus - Owner is Jame Anderson.

💬 Add Comment

TU   Comment Title: Comm

Write a comment

Add

ToDo List :

Title...   Add

Time estimate: Time spent: Color :

Deal: Vision Plus - New Deal   Loan Amount $12
Created by: Admin One

Edit Deal   Attachments   bizVAULT™ Files and Documents   Working Periods

First Name Last Name
Business Name

BASIC BUSINESS FILES AND DOCUMENTS

2017 Cash Flow Stmt

VIEW

DOWNLOAD

ACCCESS EXPIRES
July 19, 2019
(3 Days Left)

2017 Profit and Loss Stmt

VIEW

ACCCESS EXPIRES
July 19, 2019
(3 Days Left)

2017 Cash Flow Stmt

VIEW

ACCCESS EXPIRES
July 19, 2019
(3 Days Left)

2017 Cash Flow Stmt

VIEW

DOWNLOAD

ACCCESS EXPIRES
July 19, 2019
(3 Days Left)

Deal: Vision Plus - New Deal

Loan Amount $12

Created by: Admin One

Edit Deal   Attachments   bizVAULT™ Files and Documents   Working Periods

First Name Last Name
Business Name

BASIC BUSINESS FILES AND DOCUMENTS

| | 2017 Cash Flow Stmt | VIEW | **ACCCESS EXPIRES** July 19, 2019 *(3 Days Left)* |

UPDATE-ID: **07-03-006**
*If Partner Access is "View Only" - when **View Button** is clicked – display file in Doc Viewer and do NOT ALLOW user to DOWNLOAD*

REQUEST bizVAULT™ ACCESS

Basic Business Files and Documents

Required Business Documents

	2017 Balance Sheet	ACCESS
		VIEW ONLY

	2018 Balance Sheet	ACCESS
		VIEW AND DOWNLOAD

Detailed Business Files and Documents

Required Business Documents

	2017 Balance Sheet	ACCESS
		VIEW AND DOWNLOAD

Basic Personal Financials

Required Business Documents

	2017 Balance Sheet	ACCESS
		VIEW ONLY