**Register page**

Do we need the user to enter a security code?

I would remove this. It’s an extra step that adds friction.

**Dashboard**

**Design changes**

Could the document name be in a larger font size (2.4rem)?

Could there be more space between the document name and the progress bar (just a few pixels)?

The three main top menu items aren't needed on this page. Just leave the "Account" menu button.

The "Account" menu button should not be in grey - grey buttons are generally not possible to click. Maybe it shouldn't be in a rounded button at all - just a text link with an arrow at the right hand side.

"Dashboard" should not be an option in the "Account" menu if the user is already on the dashboard page.

"Next step" text needs to be 1.6rem

**Changes to the steps for making a will**

The button text for "Set up your payment plan" should not be "Make payment" but rather "Manage payments"

Change "We check that it is legally binding and reflects your wishes" to "Sign your Will and post it back to us. We check its correctly signed."

Change "Your Will has been checked" to "We've checked that your Will is signed correctly"

Change "You have made a Property Protection Trust Will" to "Your Will creates trusts that require further work by us"

Change the next step text "Pay for the Property Protection Trust Will" to "Upgrade to a premium Trust Will"

At that point, there also needs to be an option to start making a Will again (in case the user doesn’t want a premium will, but rather wants a simpler will). The button text should be "Make a new Will".

Change "You have made a Property Protection Trust Will and it is being reviewed" to "You have made a Trust Will. We need to do some additional work"

Change "Your will is in process to post" to "We'll shortly post your Will to you"

At that point, we should still have the options to download it and to notify us if the will isn't received after three days of posting - "Tell us if you haven't received your Will" (maybe a link rather than a button)

Once the will has been posted, you should still be able to download the unsigned version or notify us if the will isn't received

Change "We have reviewed your Will and it is rejected due to this reason" to "Your Will hasn't been signed correctly. We'll send you another copy to sign"

Better still, the reasons for rejection are likely to be limited: (a) there is a problem with the signature; (b) there is a problem with the witness information; (c) there is a problem with the date. We could also still have a space the the reviewer can enter the reason in.

The dialog box for the rejection reason doesn't close [At front end no dialogue message is shown now]

Once the will is stored, there needs to be options for the user to download a copy of the signed will, request that it is returned or start a new Will.

**LDE questionnaire design**

We need to change the progress bar - maybe a similar line to the progress bar on the dashboard for each document. The progress area needs to show a percentage and possibly also names of the previous and next sections.

The colour scheme needs to match the RCL colour scheme

We need to make certain questions compulsory to answer

Answers to questions that identify risk factors need to be flagged

**Will master template design**

Remove notes at the end of the document and create a separate guide

**Checking process**

Identification that the will is a Trust Will can be automated (based on answers to questions).

Email messages to customers need to have graphic design work on them. They are too basic currently.

If a PPT Will is created, there is no Tenants In Common/Form SEV questionnaire in the dashboard. Can we add the document under the will section when a button in the admin system is clicked (it’ll be us that completes this questionnaire for the user based on information from the will questionnaire). What do you need from me to do this?

The address to which the Will is posted needs to be formatted nicely and include the recipient's name. Each line of the address needs to be on a new line.