V2 Changes 12 Aug 22

Issues:

When logging in:

1. If the username or password is incorrect there isn’t any error message the button just goes black, we need to add in some error message:

“The username or password you have entered is incorrect, please try again or click on the Forgot Password link to reset your password”

1. When updating password there is no way to get back to the home page, we need to add a button to allow the user to go to the sign in page “Sign In”

These are changes required to the General & Help:

You have both General and Help all in the Help Tab, they need to be split out.

The General needs to be on the General Page and the Help needs to be on the Help Page as per the design from the web designer.

A screenshot of a computer

Description automatically generated

General – Remove the xxx

**Personal Alerts:**

We need to add in options for them to be able to get alerts for new documents they are allowed to see. These are the options:

Checkbox – Please email me when a new document has been uploaded

**Default & Personal Links (please use the links that I have linked in the below) the same as the design**

[AMAL Trustee Services](https://www.amal.com.au/trustee-services)

[AMAL Asset Management](https://www.amal.com.au/)

**User Profile: This should show the information they input in the registration form except show the actual deals that have been assigned and not the free text ones entered**

**First Name: Last Name:  
Email: Phone:**

**Company: show N/a if none Company Role:**

**Role: Deals:**

**Change Password: - REMOVE THIS Section**

**Contact Us:**

For now please add in the [support@amalinvestorportal.com.au](mailto:support@amalinvestorportal.com.au) we will change once the business decides on the email address they wish to use

**FAQ – Remove for now this section**

Please remove the xxx under the Help Menu

Changes to Screens:

1. The Welcome, always needs to have the logged in users name here in all screens i.e. Issuer, deal, financier
2. Month Can you make it read Month Year not & so in the Below example it should be July 2022
3. At the bottom of the page where the legal is please remove all of this text and make it look the same as the design with the links provided

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DESIGN FROM DESIGNER (FOR LEGAL)

A picture containing text, screenshot, monitor

Description automatically generated

[Customer Complaint Policy](https://amaltrustees.webflow.io/dashboard)

[Hardship](https://amaltrustees.webflow.io/dashboard)

[Privacy Policy](https://amaltrustees.webflow.io/dashboard)

[Credit Guide](https://amaltrustees.webflow.io/dashboard)