

Process and Vision

We are adopting an iterative strategy for delivering the "Stand Alone UI" that will evolve into the full-fledged Document Uploader UI. The key principle behind this approach is to break down the long-term vision into manageable pieces that can be delivered incrementally. This enables us to keep improving the user experience continuously, rather than waiting until the full implementation is complete. We believe this is the best approach for various reasons:

1. Continuous UX Improvement

Rather than letting the user interface stagnate for months while the complete Document Uploader UI is developed, we focus on delivering incremental enhancements. Each release brings noticeable improvements to the current experience, creating value for users early and often.

2. Flexibility & Adaptability

By deploying in smaller increments, we can adapt and respond to user feedback and steer our development efforts accordingly. This approach adheres to a user-centered process and ensures we stay aligned with evolving business needs.

3. Reduced Risk

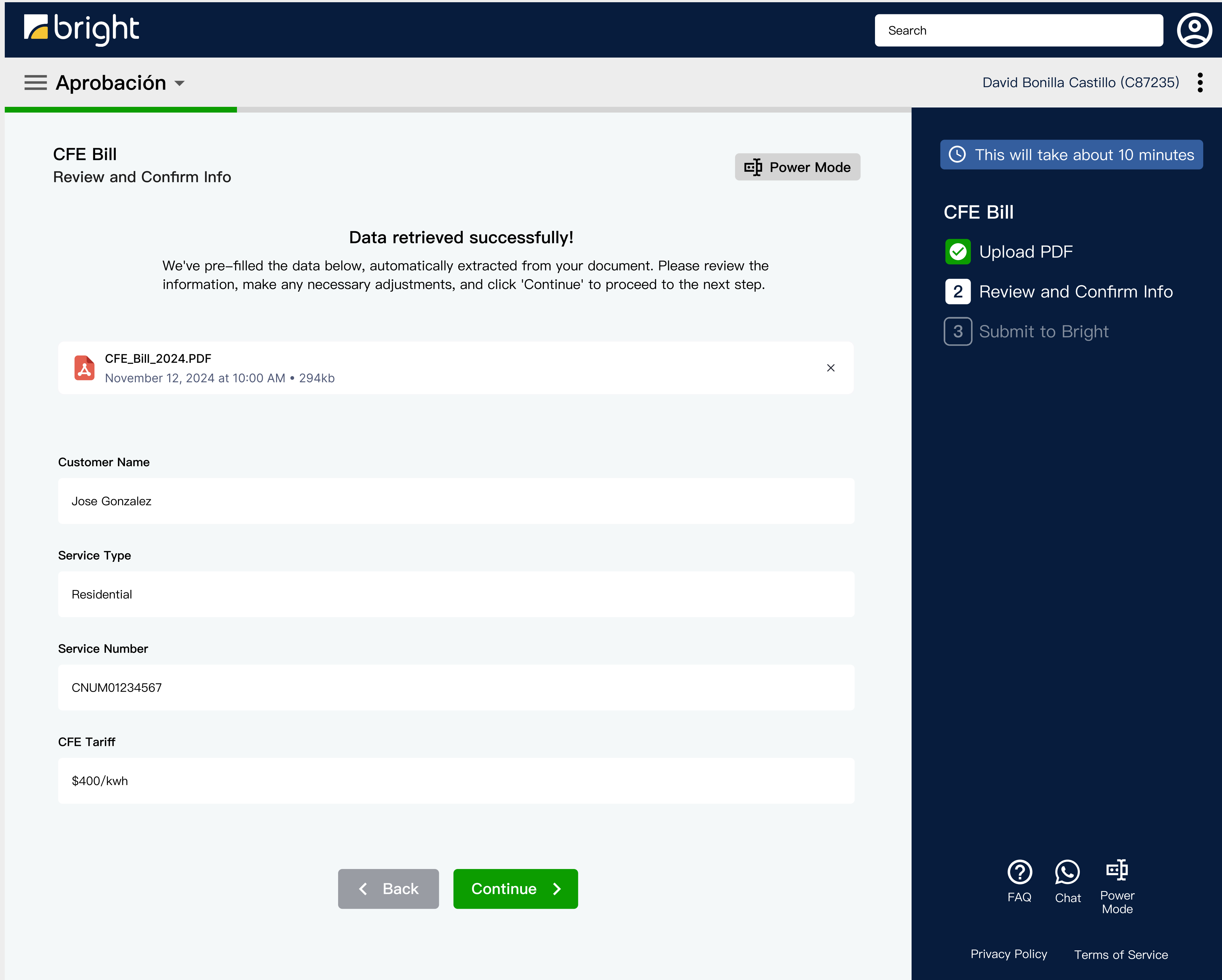
Incremental delivery reduces the risk typically associated with large-scale, one-time deployments. We can identify and address issues as they arise in smaller increments, leading to a more stable and polished final product.

4. Stakeholder Engagement

By consistently releasing visible improvements, we maintain the engagement and confidence of key stakeholders, demonstrating steady progress toward the long-term vision. Ideally this will help us achieve our ultimate goal of improving trust with customers and channel partners alike.

Short Term: Individual Steps integrated with Checklists

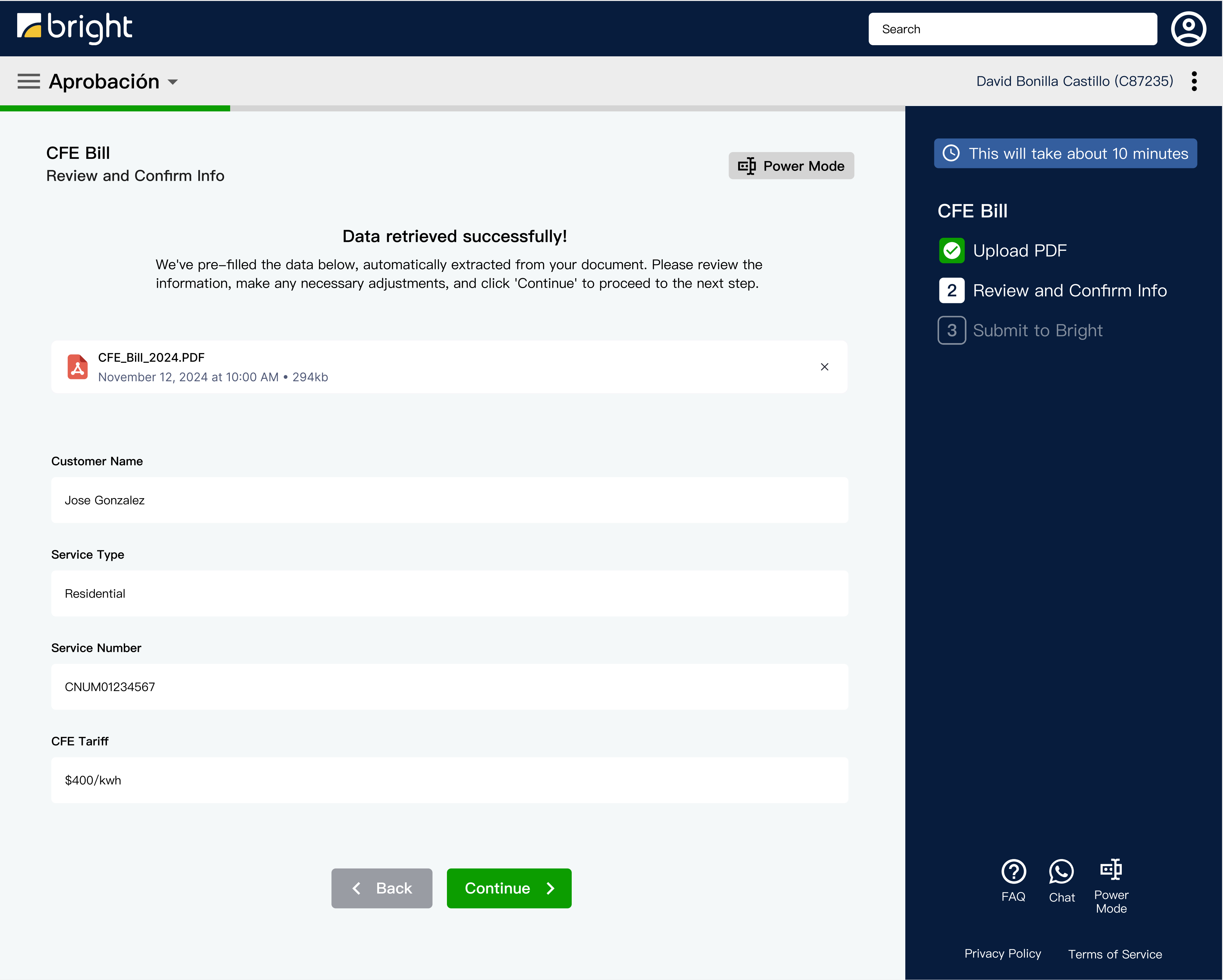
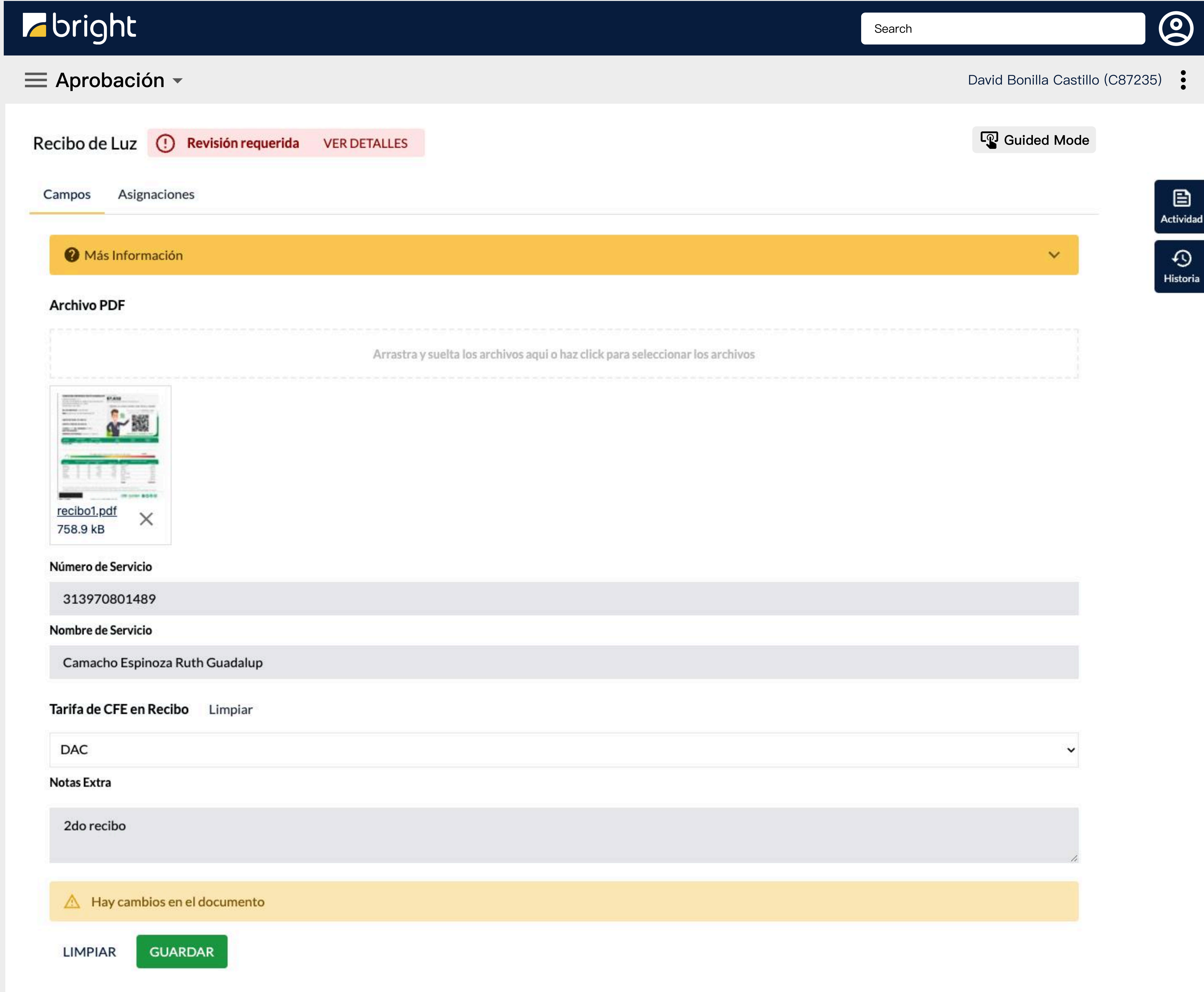
Our short-term goal is to introduce a new "Guided Mode" UI, while maintaining and improving the current "Power Mode" (Checklist UI). We will start by building individual steps of the Document Uploader UI and integrate them into their corresponding Checklist components. This ensures that each part of the new UI functions seamlessly with the existing Checklist experience, allowing us to gradually introduce improvements without disrupting user’s workflow.



Two Versions Coexisting

The key aspect of this approach is that both the existing "Power Mode" and the new "Guided Mode" will coexist within the same UI. Users will have the ability to toggle between modes based on their preference or experience level:

- **Power Mode:** The current checklist system, which gives users full control and flexibility.
- **Guided Mode:** A step-by-step interface that simplifies tasks, ideal for less experienced users or those who prefer a structured flow.



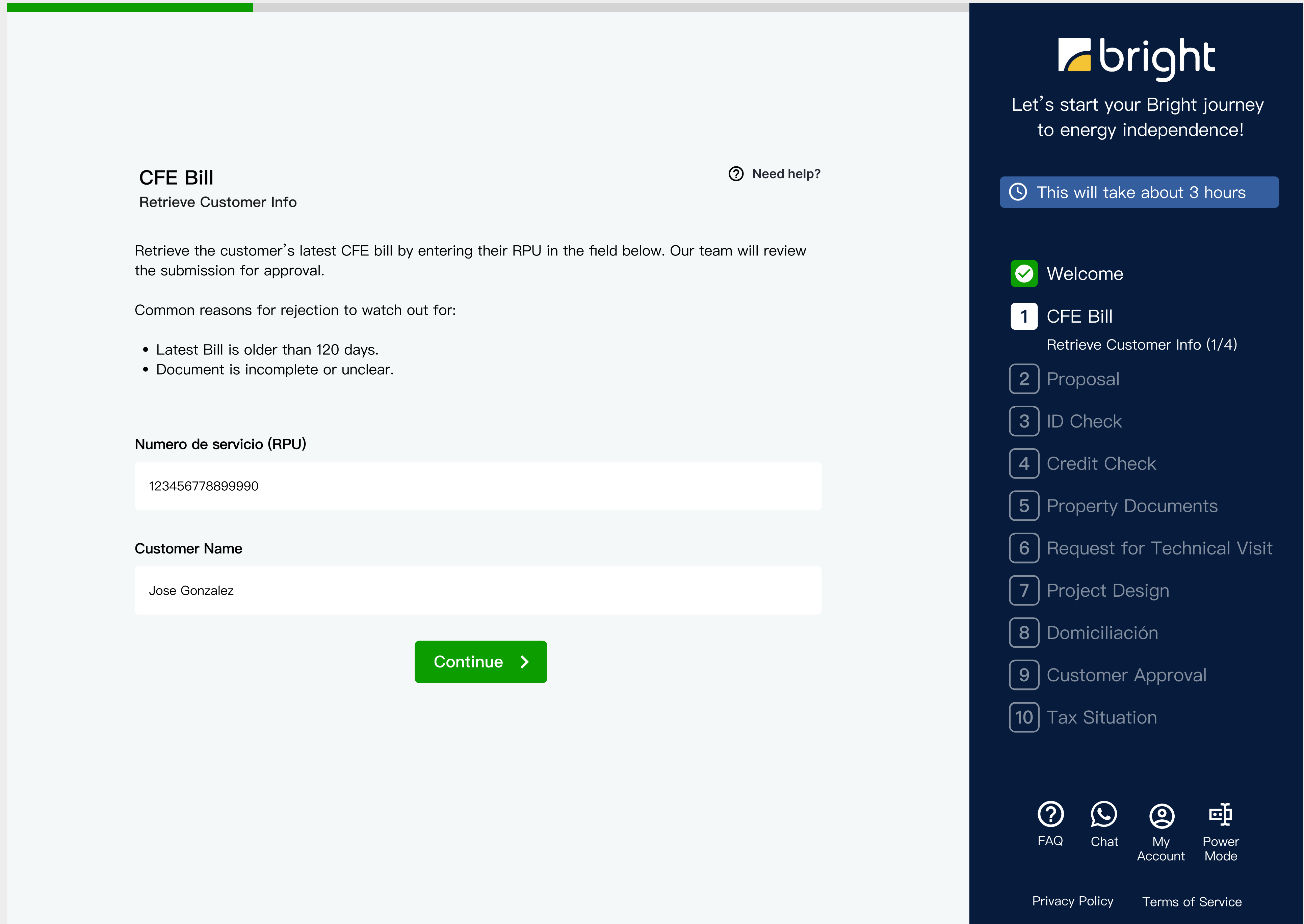
Long Term: Stand Alone UI

Our long-term goal is to evolve the "Guided Mode" into a fully independent, self-contained user interface. In this version, the UI will no longer rely on the existing Checklist framework but instead function as a standalone experience with the following key elements:

Self-Contained Experience

The Ops header will no longer be part of this UI, as the "Guided Mode" will live as a self-contained UI. This separation from the previous framework ensures that users experience a cleaner, more focused UI dedicated solely to guiding them through the process, without unnecessary clutter or distractions.

To access this UI there would be a call to action from within another platform(s) and it would open in a new tab.



Right Sidebar Navigation

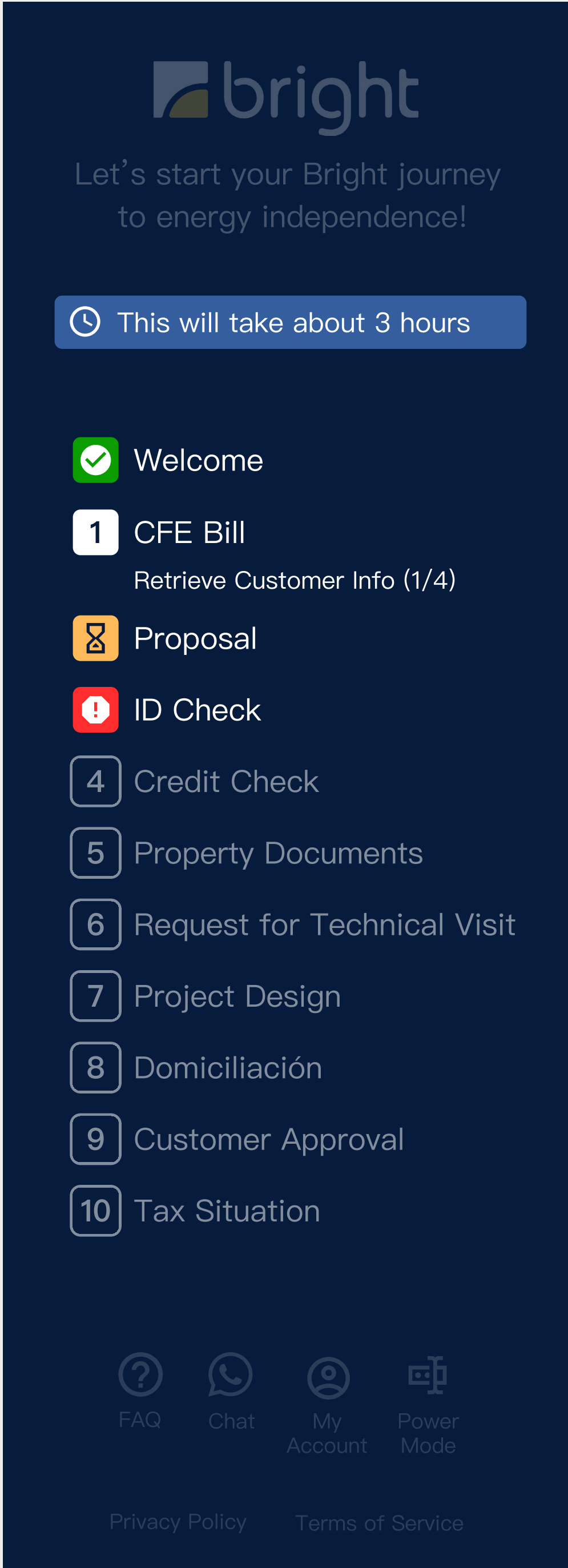
The new interface will feature a right sidebar that acts as the main navigation hub. Each step in the overarching process is represented as a top-level link in the sidebar. Users will have a clear and intuitive path to follow, allowing them to quickly understand where they are in the overall flow and what remains to be done.



Sub-Step and Status Indicators

In addition to sub-step indicators that track progress within each step, the sidebar will feature status indicators to provide real-time feedback on the state of each step. These indicators will visually communicate the following statuses:

- **Error:** Alerts users to any issues that need resolution before proceeding.
- **Process Running:** Indicates that a step is currently in progress.
- **Active/Selected:** Highlights the step the user is currently working on.
- **Complete:** Shows when a step has been successfully finished.



Easy Access to Support Resources

To further support users, we will integrate access to FAQ and Help sections directly within each step. These sections will be easily accessible, providing relevant information and guidance for the current step, helping users resolve issues without needing to leave the UI. Additionally, there will be a Chat with a Representative option, allowing users to get live assistance if needed.

