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| **Target Release** |  |
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| **Sites** | <http://whitelabel-qa.malibucoding.com/>, <http://whitelabel-stg.malibucoding.com/>, [www.creditcontroller.com](http://www.creditcontroller.com/) |

**Goals**

Deliver Credit Controller on a standalone domain, providing partner offers to customers gracefully and seamlessly within the product. The reason for the separate domain is to create a different way of selling our product and approaching the business market in a different way.

**Background and Strategic Fit**

Credit Controller is a free product, which was built as a way to acquire customers by providing them some of the benefits they have traditionally received only through purchasing premium products. In future versions, we hope to upsell Credit Controller customers to our premium products (Paid Products) or to our partners' products. Credit Controller is compiled of the D&B PAYDEX Score, Alerts, Tools (partner offers), and Payments. Banking & Finance is provided when available from DUNSlink After signing up for Credit Controller, customers will be able to access their PAYDEX score on their report page at any time.

**Assumptions**

* The terms "customers" and "users" stated below refers to the end user who will be using the system.

**Business Flow for Credit Controller Product:**

***NOTE:****Security and Site Map, will be enabled during phase two of Credit Controller.*

**Functional Requirements:**

Credit Controller will function similar to our current CreditMonitor product. Credit Controller will be calling services to fulfill product which will be stored in our database (dbcc.ecomm), and will be seen upon logging into Credit Controllers site.  This will be a separate domain from our regular suite of business credit and credibility products.  All partner products are labeled as PARTNER in dbcc.ecomm, so the only way to truly distinguish a Credit Controller customer will be by looking at the product\_catalog\_identifier.  If the the user\_type\_code is set to PARTNER and product\_catalog\_identifier is set to 7107, this confirms that it is a Credit Controller customer. In addition to PARTNER and product\_id, the dbcc\_ecomm.appuser.application\_user table also contains a partner\_id column. For the case of Credit Controller, the value populated in this column will always be 28.

1. **Homepage  (Logged Out)**

The homepage will have one main Call to Action (CTA): a business search. Within the homepage, the user will also have access to various sections under different headings, without registration required.  
a.  About Credit Controller:

* Why - Explaining why business should sign up for Credit Controller.
* What - Explains what the Credit Controller product contains.
* How - Explains how to get sign up for Credit Controller.
* Learn - Education center, offering educational videos about business credit.

b.  Getting Started

* Find My Business - Users begin the sign-up process by searching for their business. Registration is one time only process that collects all the information to create a user for Credit Controller. The information collected is:  
  - First Name  
  - Last Name  
  - Email  
  - Password
  + In addition to this user-generated information, the registration process also collects the company data from the business the user selected.
* After registration is complete, the user will be sent to their product page and shown their data. A welcome email will also be sent to the user via Mandrill.
* Sign In - Users who have already registered with Credit Controller can simply sign in to view their business details.
* Contact Us - For any question and concerns, users can contact us any time.

c.  Our Policies

* Privacy Policy
* Terms of Service

Interface -

QA: [http://whitelabel-qa.malibucoding.com](http://whitelabel-qa.malibucoding.com/)

STG: [http://whitelabel-stg.malibucoding.com](http://whitelabel-stg.malibucoding.com/)

PRD: [www.creditcontroller.com](http://www.creditcontroller.com/)

2.  **Logged-In Profile (Product) Page**

The logged-in profile page will function as the main product page. It will show the D&B PAYDEX Score, alerts, partner offers, payment history, and Banking & Finance if available. All other things found on this page will be:

* Company Data
* Paydex Score

 - Historical Data/ Industry Comparison

* Payment History
* Banking & Finance (if available through DUNSlink - otherwise this section will not be displayed)

 - Statements

 - Benchmarking

* Alerts

 - Interface with alert emails to display the same information that is emailed within the product.

* Partner Offers

**3.  Email Templates for Credit Controller**

Welcome email - This email will be sent for new customer registration.

Forgot Password - This will be sent when new password is requested.

PYADEX Score Change - This will be sent anytime PAYDEX score changes.

Contact Us -  This will be sent to info@creditcontroller.com, which will go to Joy.  She will review and respond. 

**Other Logged-In Pages:**

* Notifications - This is where user will set communication preferences for email communications.
* Profile Settings - User will be able to update their name, address, and change password.

In future versions, users will also have the ability to cancel their account with Credit Controller. Doing so will cancel their product and mark the account as cancelled in Phoenix. The user will be able to re-register using same email, but they will have to go through the entire registration process again (select a business, etc). Once an account is cancelled, the products will no longer be available.

**Logged-In Interfaces -**

Profile (Product) Page:

Notifications:

Profile Settings:

CMS Interface:

**Product Team Will Control CMS Changes:**

Product team will manage CMS, and have control of any edits which might be needed.  Features which will be included in this are:

* Homepage  
  - Feature Header  
  - Feature Intro  
  - Feature List  
  - Why Header  
  - Why Intro  
  - Why List  
  - What Header  
  - What Intro  
  - What List  
  - How Header  
  - How Intro  
  - How List  
  - Video #1 description, link, and title  
  - Video #2 description, link, and title  
  - Video #3 description, link, and title  
  - Video #4 description, link, and title
* Privacy Policy
* Terms of Service
* Product Page  
  - Tools Get Help for Your Business Credit File  
  - Tools Help Take Control of Your Online Presence  
  - Tools How Do the Reset of Your D&B Scores Look?

**Product**

[Credit Controller] => 7107

[PAYDEX] => 7109

[DBCC Alerts] => 7115

[Payments] => 7117

[History and Ops] => 7119

[Banking & Finance] => 7121

Partner\_id = 28

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