Goals

* The goal is to create a new user experience along with some new features for existing Verified Product.

Background and strategic fit

Following are the reasons behind updating existing Verified Product:

1. To make it more user Friendly - so that more and more people can use it.
2. To make a better Verified Registration Process.
3. To add more elements for business Verification.
4. To open online sales channel for buying this product.

Assumptions

* The term "customers and users" stated below means the end user who will be using the system.
* The term "business owner" stated below means the person who will be buying the Verified Package (Free/Paid)

**Business Flow for Verified Product:**

a. Front end Flow. Dashboard Flow:. Address Token:

Functional Requirements :

**1.   New Verified Business Report Page:**

      Interface:

This is the existing Verified Business Report page with new UI. We will keep existing url. Users will land on this page by clicking on any search result from Verified search or through existing Credibility review page. There wont be any actions to be performed on this page (meaning it will be a plain report) This Report page will have following features:

**Basic Information of Business:**

1. **Business Name** – We need to display the Business name with which business is registered.
2. **Business Address** – We need to display the business address - one which is verified and is on file.
3. **Business Phone Number** – It will be displayed right below business Address.
4. **Website URL** - Business owner’s website URL will get displayed on this page.
   1. It will only get displayed if business owner has added that from manage screen via dashboard or if we already have that information in database.
   2. It will be displayed below Phone # and if its not available then it wont appear.
   3. On click on url, users will be directed to Business Owner’s site which should open in a new tab.
5. **Business Verification –**This will consist of all elements from existing VBR Page. All the rules which are applied to verify them will still remain the same. There is no update in that.
   1. VERIFIED™ Status  - it will be displayed in the form of Verified badge (which will get displayed on top tight corner of this page if its verified)
      * 1. VERIFIED Since - It will be displayed right below the Verified badge if the business gets verified. It wil show - "Since: date"
        2. Contact VERIFIED
        3. Address VERIFIED
        4. Credit Card VERIFIED
        5. Website VERIFIED
        6. Email VERIFIED
        7. All of the above stated data elements will also display the value of each element in front of it along with its status (verified, not verified). If any of these data elements don't have value then it will display blank value.

**6.  Social Verification -** It will have a few new elements in addition to existing list. All the rules/methods which are applied in order to verify these will still remain the same. We will implement these in Phases and will start with.

* + - 1. Facebook
      2. Twitter
      3. Yelp – Business owners will have the ability to show their Yelp Profile information as Verified.
         1. This information can be added from manage screen via Dashboard.
      4. LinkedIn Profile - Business owners will have the ability to show their Linked Company Profile Information as Verified.
         1. This information can be added from Manage screen via dashboard.
         2. It’s going to be a similar process like all other social Verification which are added above.
      5. Foursquare
      6. The order of display for these Social sites will remain as listed above.
      7. All of the above stated data elements will also display the value of each element (social account URLs) in front of it along with its status (verified, not verified). If any of these data elements don't have value then it will display blank value.

**7.    Scores & Ratings:**  Only the name of this has been updated and rest all the elements still remain the same. All the rules/methods which are applied in order to verify these will still remain the same.

* + - 1. D&B Paydex Score
      2. Financial Stress Score
      3. Supplier Evaluation Risk Rating
      4. Delinquency Predictor Score
      5. It will display only checkmark or X mark in front of it which will represent whether we have it or not. it wont mean its verified or not.
      6. **Header and Footer** - There will not be any header and footer on this page as this is a Report and will always open in  a new tab whenever any user tries to open it from Verified Search  results page or Credibility Review Page.
      7. We will display DBCC copyright message,Privacy policy, Terms of Service and Contact Us link at the bottom right corner of the Report (existing functionality)
      8. DBCC logo will be displayed on top left corner of this report page.

**8.  Verification status of each element** - Following statuses will be displayed for each element:

* + - 1. Checkmark will be displayed if the element has been Verified (existing functionality)
      2. X mark will be displayed if the element has not been verified at all.
      3. Pending state icon will be displayed if verification of an element is in pending state.
      4. The Verification process of verifying each element remains exactly the same.

**2. New Unverified Profile page:** This is a brand new page which we are creating and will be displayed when the user clicks on any business which is not verified from search results page (both grid and map view)

Interface : PLEASE NOTE - The interface attached below  should look similar to the one attached with New Verified Business report page.

1. This page will look exact similar to Verified Report page (its just the different state of verified report page) and rest of the functionality of this page will remain exactly the same as mentioned above.
2. This page will not show Verified Logo on top right of the page (as its not Verified) and instead will have a button stating - **"Click here to Verify"**. When the user clicks on this button, then user will be directed to registration page (if the user is not logged in) but if the user is logged in then will be directed to Verification page (its requirements are mentioned below).

**3. Verified (Free Package) -**

1. Free Verified Profile page will have exact same functionality as mentioned above in Verified Report Page section.

**4. Verified Pending State -  This state will only appear in the case when business owner tries to buy the Free Verified Package and has generated the verification code (either by Phone or address) but has not entered the code yet.**

Interface -

1. This page will have also have exact same functionality as mentioned above for Verified profile report page but nobody will be able to verify this business as someone has tried to verify it already (that's why its in pending state).
2. When the business owner clicks on "Click here to Verify" button - screen grays out and a pop up gets displayed with a message - "This business is Pending verification. If this is your business and you did not authorize this action, Please call 800-683-5163 " with close button displayed below it.
3. When the business owner clicks on Close button, screen will go its default mode and pop up will disappear.

-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**Manage VERIFIED from Dashboard**

1. Business Owners will get ability to manage (add/edit) their Verified business Report page information by logging into Phoenix dashboard and by clicking on the button "Manage Verification" link which gets displayed below the Verified Logo on Phoenix dashboard.
   1. The button which gets displayed next to Verified Logo - "View Report" will take the user to Verified Business Report page and will open that in a new tab.
2. Business owners with both Paid and free package will be able to add/edit (manage) their business report page.
3. View Report button which gets displayed next to Verified product on dashboard should take the Business owner to Manage Verified Business Profile page instead of Verified Partner Network.
4. From this new manage Verified page, Business owner will be able to manage following details :
   1. Add/Edit Business Basic Information
   2. Add/Edit Business social Information
   3. Localeze Data Distribution
5. This page will also have 1 link to external page which is :
   1. View Verified Business Report page
6. Verified dashboard can be in only one state:
   1. **Fulfilled State** - Business owner will be able to manage everything from here.
7. **Manage Details Section** : It will be an accordion and will have following features:  
   **1. General Rules :**
   * 1. Following verification statuses will be displayed next to each element :
        1. If the element Verification is complete then it will show the time stamp on it - "Verified- 12/12/14 "
        2. If the element verification is in pending state then it will show the status as - "Verification Pending"
        3. If the element information has never been added or edited then it will show the status as - "Not Verified"
     2. Hover states – When the business owner hovers on any of the elements then it should get highlighted.
     3. When the business owner clicks on one section of accordion then other one can also stay in expanded mode as well meaning in total there will be 3 which are business, social and Data distribution.
        1. By default, all three sections of the page which are Business Information, Social and Localeze will be displayed in expanded mode and it can be closed by clicking on top section of the row or the collapse icon and same goes for expanding it too.

**2. Add/Edit Business Basic Information:** When the user clicks on expand icon or anywhere on this section then it will expand and will have following business info mentioned below to add/edit.

**a.   Business Name** – First element which will be displayed in Basic Information will be Business Name  with Lock icon which means that it wont be editable.

**b.  Address** -Business owner will the get the ability to update their address. The functionality of verifying and updating the address still remains the same.

* + - * Address verification process will take place in a pop up but functionality will still remain same.
      * When the business owner clicks on edit icon for address then screen will grey out and a pop up will appear which will have address fields will prefilled address (Address 1, Address 2, State, City, Zipcode)  and user will be able to edit their address from there by clicking on update button.
      * When the business owner updates an address, until it is verified, an alert icon with a message will be displayed on edit mode of the page saying – **“Verification Pending”**. This will only go away once the business owner verifies it.
      * When the business owner updates the address then a postcard with token/code and URL will be sent to business owner's newly updated address to verify it.
      * Postcard  will have a URL to enter the token which is - <http://www.dandb.com/verified/mycode/>

This Page will have existing functionality.

Postcards will be sent automatically by the vendor whos API we are integrating.

**3.  Phone number** – Business owner will get the ability to update the phone number from this page. The process of updating phone number still remains the same but it will be displayed on a pop up.

* + - 1. Interface -

* 1. When the business owner clicks on edit icon then screen will grey out and a pop up will appear.
  2. This pop up will have a text field with prefilled phone number and an Update button next to it to update a new number.
     1. Text field to enter Verification will not be displayed until the business owner clicks on update button and on clicking, verification code text field will slide up (nice transition)
  3. If the business owner updates the phone number field and clicks on Update button then Verification token can be entered in token field (the one which business owner will receive by clicking on Update button)
  4. When both of these activities are done,then pop up will close automatically and new information will get updated everywhere.
  5. If the business owner doesn't add verification code number then your contact goes in Pending verification as business owner has added a new contact number that has not been verified. If the business owner wants to verify the number then they will have  to enter the code in verification code text field.

**4.  Website URL** – Business owner will get the ability to add their website URL. This will also be displayed in a pop up.

* 1. Interface -
     + 1. Website URL should match existing url specifications.
       2. As soon as business owner clicks on edit icon, screen will gray out and pop up will appear which will have a text field with generate button displayed next to it.
          1. If the business owner enters valid Url and clicks on Generate button then pop up will expand and Seal will get generate with Remove link displayed on top right corner.

If the business owner clicks on remove link then it will go its previous state which is Text field with a generate button.

* + - * 1. Two radio buttons with following options will be displayed once the busin ess owner generates the seal:

Transparent verified Logo

Visible Verified Logo

By default, Visible Verified Logo will be selected.

Business owner will get the  ability to select which one they want to put on their website and once they do, their website/domain will get verified.

* + - 1. The whole process of generating the seal and putting on domain and then verifying the domain remains exactly the same (logic remains same).

**5.  Email Address -**Business owner will get the ability to verify email address. This will also be displayed in a pop up.

* + - 1. When the business owner clicks on edit icon next to email address then a pop up comes up with a text field to enter email address with Save and cancel button at the bottom.
      2. When the business owner enters an email address and saves it then system will send an email to that email address and owner will have to verify it by clicking on it.
      3. It will have the same existing functionality. until Email address is verified, it will remain in pending state and once the business owner verifies it, then its status will show as "Last updated - 12/12/13".
      4. Existing Email will be sent to business owner (there is no update in that)

**6.   Edit Business Social Verification Information –**

* + - 1. Interface

                                        1.  It will be displayed in a separate tab in an accordion and will have exact same functionality.

                                        2.  By default, all 5 of the social sites will have their existing Verify buttons displayed next to them.

**Twitter** - When the business owner clicks on “Verify my Twitter Handle” button then business owner will be directed to Twitter handle page and from their business owner will have to Log in to their business profile page (same existing functionality)

                                                                           a.  If the business owner clicks on twitter handle button but doesn't do anything and comes back then button will still remain same.

                                                                            b.  And if the business owner verifies then it gets verified and  then Business name will displayed and remove link will get displayed below it.

                                                                            c.  When the business owner clicks on remove link then screen will grey out and a confirmation pop up will be displayed saying “Are you sure you want to remove this with Yes and No option”

**2.  Facebook and Foursquare** – same existing functionality will be there for both of these and new confirmation pop will be added to remove the linkage.

**~~Yelp –~~**~~This is the new social element which is getting added to this Verification type. But it will have the same functionality like above mentioned social sites.~~

~~Business owner will be able to create a new Yelp business page if they don’t have one by clicking on Create new Business Profile or can link to their existing business profile page by clicking on Verify my Yelp button.~~

~~When the business owner clicks on the button, then a login pop up for Yelp will appear to verify account (same as above mentioned other social sites)~~

**3.  LinkedIn –**This is also new element which is getting added to Social Verification type. But it will have the same functionality like above mentioned social sites.

 Business owner will be able to create a new LinkedIn business page if they don’t have one by clicking on Create new Business Profile or can link to their existing business profile page by clicking on Verify my LinkedIn button.

When the business owner clicks on the button, then login pop up for LinkedIn will appear to verify account (same as above mentioned other social sites)

                        3.  If the business owner wants to remove the social connection then they can do that by clicking on Remove link which will get displayed below.

**Social accounts should be displayed in following order:**

Facebook

Twitter

LinkedIn

~~Yelp~~

Foursquare

* + - * 1. **External Links :**

**View Verified Report Page -**Verified Profile Page link will be displayed on this page and on click will take the business owner to new Verified Report page which will open in a new tab.

---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**Verified Registration Path**

1. We need to update our existing registration path for users (logged In/out) . Instead of 5 registration steps, we need to change that to 2 steps in total now and they are – Register/Login and Verify any of their business Information.

**Logged Out User –  When the user clicks on Click here to Verify**from Unverified Business Profile page  –  
a. Interface -  
When the user is**not logged** in and clicks on  "Click here to Verify" on Unverified Profile page then  following process will take place:

1. User will have to either Register or Login to claim the profile.
2. Name of the Business, Address and Phone# will be displayed on top from where user comes from (the previous page from where user clicks on Click here to Verify button).
3. By default, registration fields (first name, Last name,email address and password - text fields) will be displayed on this page and a login link will be displayed on right side of the page.
   1. Login and registration will follow existing requirements.
4. Once the user registers or signs in then user will land on another page which will have 3 options from which user will be allowed to verify one and they are following :
   1. Verify Phone number
   2. Verify business Address
   3. Verify Credit Card
      1. The above listed options will be displayed in radio selected form and in the same order listed above and by default phone option will be selected.
      2. Business owner will not be allowed to edit any of the information until they complete their initial verification.
      3. If the business owner clicks on Verify button which will be displayed at the bottom of the screen then screen will get grayed out and a pop up will appear.
      4. **If Phone option was selected** - then pop up will have a static text on top saying - You are about to Verify phone number and number will be displayedand a Call button will be displayed next to it.
         1. When the business owner clicks on call button then a call will be made using the existing twilio Service.

**Website Verified for Shopify Customer When Badge Is Loaded to Site**

In the Shopify flow, a process installs the Verification Badge on a customer’s Shopify site.  Upon purchase, the website will not automatically be verified, but will be set to pending when the URL is passed.  Once the badge is loaded on the customer’s Shopify site, the website will be marked as Verified.

**Users Entitled to Veteran/Premium SKU Required to Verify Veteran Verification**

Veteran Verification will now be required for those customers who are entitled to the Veteran add-on. The Veteran Verification is a three step process consisting of:

* Veteran Verification
* Business Ownership
* Declaration of Authenticity

If a customer owns a Veteran add-on, the VERIFIED dashboard restrict users from other business verifications and direct them to the Veteran Verification flow.  Verification will begin once the user clicks on the edit icon.  If the user is instantly verified, a success message will display.  If instant verification fails, the user will be prompted to upload supporting documentation.  This verification process may take up to 20 minutes.

Documents that can be uploaded are:

* Form DD214
* Orders
* VA ID
* Official Letter
* Any Government document that displays first/last name and military status or affiliation

If verification fails, an email will be sent to the business owner with the reason(s) the Business Ownership or Veteran Verification failed.

The appropriate status is displayed in the Business Ownership section of the VERIFIED dashboard.  In the case of a failed verification, the status is a link with the reason(s) for the failure.

*Screenshot of Locked Dashboard:*

*Screenshots of Veteran Verification Process:*

Once the Veteran Verification has been successfully completed, the user will be prompted to verify Business Ownership.  For Business Ownership, users will be prompted to complete all required fields on the “Update your Business Ownership Information” screen.   Business Name and address will be pre-populated.  Business Name will be locked from editing.  After completing the Business Ownership Information, the user will be required to upload supporting documentation.

Once both Veteran and Business Ownership sections have been successfully verified, the user be able to move to Declaration of Authenticity.

The system will also verify the name on both Veteran and Business Ownership.  If the names are different, an error message will be displayed informing the user to re-verify either of the verifications.  Once the names match, the user will be able to sign the Declaration of Authenticity and get the Veteran's badge.

Once the process is complete, a Veteran Badge is displayed on both the Product Dashboard and VERIFIED Business Report.  At this point, the VERIFIED Dashboard will be unlocked, enabling users to verify other business information.

**Data Distribution Copy Change in Verified Dashboard Pop-up**

The date format for the next scheduled distribution release will display as “month” and “year” instead of month / day / year.

***Example screenshot of data distribution copy:***

[Like](https://dunandb.jira.com/wiki/display/BAH/Verified+Phase+1)Be the first to like this

* No labels
* [Edit Labels](https://dunandb.jira.com/wiki/display/BAH/Verified+Phase+1)