

Release Notes – Customer Portal 2023/02

On 20 February 2023, after several months of intensive development, we released further improvements to the customer portal. As a major milestone, business partner related tasks and access rights are now available. In addition, we have again made some minor improvements.

The most important new functions are:

1. Borrower-related tasks are now available in the portal. Essentially, these are the
 - "KYC Check",
 - "Provision of annual accounts Task" for the review of financial situation or an
 - "Individual Task" for other borrower related requirements.

Only users with the role "Executive" automatically have access to the borrower-related tasks.

The borrower-related tasks are displayed both with the relevant deal section and in the "MY TASKS" overview in the sidebar.

2. A User with the role "Executive" can also assign authorisation for borrower-related tasks to other portal users. New functions have been added to the "MANAGE TEAM" area for this purpose.
 - In the "Deal" tab, users can be invited to the deal as before.
 - In the new tab "Customer", the authorisation for the borrower-related tasks can be assigned. If there is only one customer in the deal, this customer will be displayed; otherwise the corresponding customer must be selected via dropdown field (1). The next field (2), allows selecting the user to whom the extended rights and access to the borrower-related tasks should be given.

MANAGE TEAM

INVITE MEMBERS

Deal

Customer



PLEASE SELECT CUSTOMER

1

Please select a customer...



EXTENDED RIGHTS


2

SELECT A TEAM MEMBER FOR CUSTOMER

Please select a user...



 Access to customer tasks and duties

 Access to postbox

AUTHORISE