

Release Notes – Customer Portal 2022/10

The 10th of October, we released new functionality and improvements following your feedback (thank you!). We also fixed some bugs and enhanced performance. The most important new features are:

1. We changed the entitlements concept for the portal, and introduced some new user roles.

INVITE MEMBERS

External Member Internal Member

Email Address

USER ROLE IN DEAL TEAM

Please select a user role...
Customer
Deal Manager / Asset Manager
Lawyer
Monitor
Valuer
Restricted User

- Customer: the role for all direct pbb customers. There are 2 different roles: “Executive” and “Standard”. Only the Executive User is entitled to invite further users to the pbb customer portal. When you want to invite other users from your company to the portal, please use one of the “Customer” roles taking into account the entitlements that such user requires.
- Deal Manager / Asset Manager: please chose this role when a third party user manages the deal or the property (portfolio) on behalf of the Borrower.
- Lawyer: this role is suited for external lawyers that assist in closing the transaction.

The other roles (Monitor, Valuer, and Restricted User), remain unchanged.

2. For new business deals, conditions will be displayed in the portal once the term sheet has been signed.
3. The explanatory wording for the options to personalize your email notifications has been improved to give better information regarding the chosen preferences.
4. The link to the FAQ and Videos is now on the left side bar.
5. You can now change the language setting from English to German and back in one click.

6. You can now send emails and make calls directly from the Manage Team window in the pbb customer portal, if your browser or other apps on your computer (e.g. Jabber) support this.