Customer portal account management

Register

Verify Customer Account

Manage Account/Profile

Notifications

Close Account

Manage services

Initiate application

Edit application

Submit application

Track applications and view notifications

Manage Events

Claim

Managed claims

Complete a claim

Submit a claim

Track a claim

Next Sprint | 3

User Registers for Basic Portal Account

User login to Portal Account
Coming Feb

User Logout Portal Account
Coming Feb

Customer Portal Phase 1 | 17

Add personal details

Add business details (more than 1)

Link Portal Account to CRM Account

Supply T&C and Privacy Policy content

Investigate automated ID&V so it can be brought forward to registration process

Update personal details

Update business details

See user dashboard

Establish Roles & Permissions model

Allow SE staff to handle Customer Portal

Welcome email

Manage B2C Profile

Change Password

Automatically timeout User? MVS?

View Account details

See notifications

SE staff Create Notification

New Functionality (Unscheduled) | 47

Improve User self-registration for a Portal

SE builds forms

Supply SE eligibility data

Supply SE priorities data

Supply FUND-specific data

SE initiates/enrols registration of a Client
Coming Feb

Initiate creation of a Portal account from

SE Website/App enrols Client

Create Portal Account from Expression of Interest

User can manage many Businesses

One Business (Account) can be managed

SE Assisted Digital team enrols Client

Capture Personalisation data for SE.com

Create Basic (Bar) Account

SE User Registers for Portal Account

Joint Accounts

Enhance MFA options

Verify / validate Business Data
Coming Feb

Manage additional users

Account Housekeeping?

Evidence Housekeeping

logs of logins?

User login to Portal Account v2
Coming Feb

User Logout Portal Account v2
Coming Feb

Edit base data set

Edit FUND-specific data

User can ask for support via different channels including offline

User has access to online portal

User can update their details
Coming Feb

User can track changes made to their

User can manage notification preferences

SE can get a single view of the customer?

SE can track changes made to customer's information UN 10.4

User can recover account if can't remember email used and password?

User can claim an account for their business when previous holder of the account left the company without transferring account?

Confirm stale Customer details

Consolidate Customer data Sources to

Reporting?

Regularly Check Customer's Eligibility?

Notify Customer of CRM record changes

Notify relevant SE staff of CRM record changes

CIM send targeted offerings
Latest Jun 24

User deletes Account

SE User deletes Account

Housekeeping Deletes

user unsubscribes from SE

SE delete inactive accounts?

User can save application to return later
Coming Feb

SE initiates an application

Application pre-populated with known

Update Account with Application data

User can get their application reviewed by SE staff prior to submitting ? - UN4 and UN4.3

SE provides review of application service? UN 4.3

User have pre-filled application if they are an SE customers and only provide information that only them hold - UN2

Get help
Coming Feb

User can resume an application that was
Coming Feb

User can provide documents and info
Coming Feb

Interaction is added to account

User receives status updates via email -

User receive reminder to finish an application they started - UN 3 and 4

SE can request documents documents and info needed to appraise an application -

SE push a notification of an opportunity to a customer

User can see status updates in portal UN

Attend Event
Latest Event Offer

To discuss | 25

template
To order

User provides basic account details
Coming Feb

Customer verifies their identity???

VAT and Companies House lookup

User can identify themselves in a simple ways providing the right level of information depending on the service needed UN 13
Priority

SE provides a termination option for
Coming Feb

customer can view a grant offer - UN4
Coming Feb

customer accepts offer
Coming Feb

Customer reject the offer

User can view all claims
Coming Feb

User can adjust claims schedule
Coming Feb

User can shut down a project

User can save claim and return later

User receive reminder to finish a claim they started

SE provides saving of claim service

Interaction is added to account

User can make a claim
Coming Feb

User receives status updates via email

User can see status updates in portal

User can receive reminder to submit a a regular claim