

# Merchant Portal 3.0 User Experience Design

By Karthikeyan Dhanasekaran Principal UX Designer Snap Finance Inc

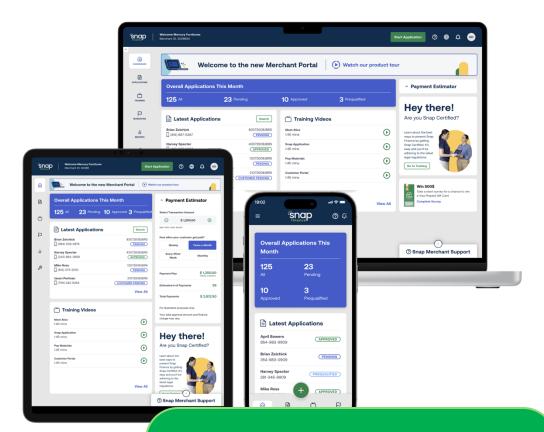
	0-0006   MERCHANT SUPPOR: (100) 000-0006   CUSTOMER SUPPOR: (100) 000-0006 Sun-Thu: 800µm - 500pm MT   Pri-Sat: 800µm - 600pm MT Home Resources Administration Log Out			
Good Morning, 6731 Store in Town Merchant ID: 6731 Etest@snaptech	Client Success Manager Darcy Doe 도 (100) 000-0056 단 test@snaptechnology.net	6731 Store in Town	Sales Rep. Tariq Doe € (100) 000 0056 ⊡ test€snaptechnology.net	Client Success Manager Darcy Doe ℃ (100) 000-0056 ☐ test@snaptechnology.net
EDGE leads - 72 new leads worth <b>\$152,298.00 </b> are waiting! Learn n	re		L rescentificerition@yates	Cestesuthrecumorogy.net
🕀 New Application <sup>9</sup>   🗍 Text Application <sup>9</sup>   🥘 Preapproved <sup>9</sup>   🖏 EDGE leads 🤕   🔎 Search Applications	Reports	EDGE leads - 72 new l	eads worth <b>\$152,298.00 </b> are waiting! Learn more	
My Customers e d g e	☐ Refresh Feed	이 🗍 Text Application 🤗   🛞 Preapproved <sup>8</sup>   💰 EDGE le	ads 🥺   🔎 Search Applications   📓 Reports	
Q Search Applications Location Salesperson Date Range	× Win \$500!	stomers e d g e		C Refresh Feed
Search by Name, Application ID, Phone Location 1 V Select A Salesperson V 06/01/2020 - Showing 20 / 51 Results	Complete a short survey for a chance to win a Visa Prepaid Gift Card Click here to get started		Iesperson Date Range   Select A Salesperson V   06/01/2020 - 08/14/2020	× Win \$500! Complete a short survey for a
Application ID Name Mobile Number ③ Application Status				chance to win a Visa Prepaid Gift Card
20080606M3TX Tyler Doe (555) 555-5555 Inactive	edge Revenue (Year to Date)	51 Results	< 1 Z 3 >	Click here to get started
• 20080606M3TX Tyler Doe (555) 555-5555 O Approved	SO Learn More Leads 🕥	ion ID Location (MID) Name	Mobile Number ③ Application Status	
20080606M3TX Tyler Doe (555) 555-5555 Inactive		606M3TX Location 1 (6731) Tyler Doe	(555) 555-5555 Withdrawn	edge Revenue (Year to Date) \$0
Email Address: Channel: Created: - SMS 3/11/2020		606M3TX Location 2 (4731) Tyler Doe	(555) 555-5555 <b>O Approved</b>	Learn More
ADD NOTE Salesperson: EDIT Submitted: Norman D 3/11/2023		606M3TX Location 3 (6701) Abbie Wilson	(555) 555-5555 <b>Completed</b>	
Inactivated : 01/12/2024		606M3TX Location 4 (8701) Tyler Doe	(555) 555-5555 Denied	Application Status       Wtthdrawn     3
		606M3TX Location 6 (9701) Tyler Doe	(555) 555-5555 🛆 Pending Signed Docs	
		606M3TX Location 7 (9901) Tyler Doe	(555) 555-5555 <b>A Pending Delivery</b>	Submission Channels
Denied		606M3TX Location 8 (9961) Tyler Doe	(555) 555-5555 <b>O Pending Completion</b>	L Merchant €

## Old Design Screenshots

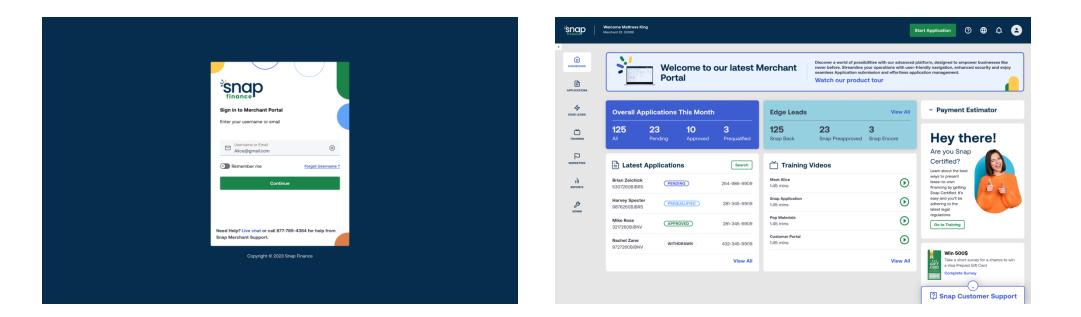
## New User Experience Design – Mobile First Approach

#### **Design Strategy**

- Gather insights and paint points through User Research
- Task Analysis and Prioritization to understand what is important to our customers
- Defined Success Criteria
  - $\checkmark$  More Origination to LTO and LOAN
  - ✓ Streamlined Navigation
  - ✓ Task Reduction Time to complete the key tasks
  - Reduce Training Cost both tool usage and Customer Care team time spent on resolution
  - ✓ Inclusive Product usage for every customer even with disabilities issues can easily access.
  - ✓ Increase Merchants workforce to hire more peoples with different abilities to reduce un-employment rate for people with disabilities.
  - ✓ Developing a mental model that reduce learning curve.
  - Reduce development cost with re-usable UI pattern for development.



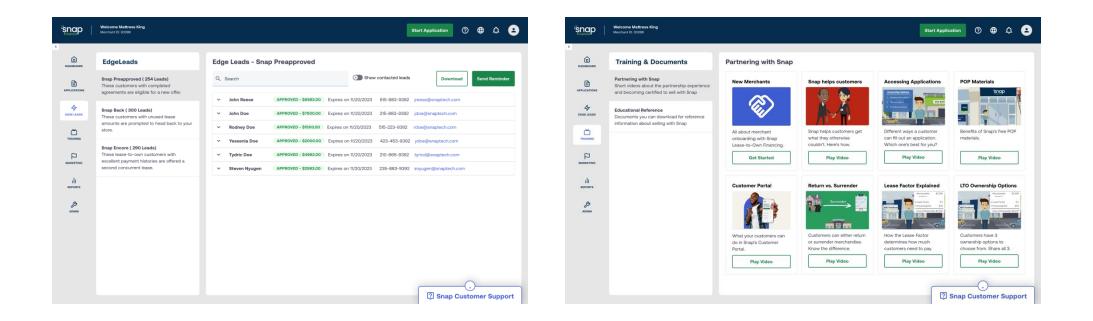
Merchants Feedback – New Portal is very simple to USE, More Streamlined, No Learning Curve.



#### Re-usable Interaction Design Pattern,

*snap	Welcome Mattress King Mechant ID: 2008	l	Start Application 🕜 🌐 🏚 😩	Welcome Mattress King Merchant ID: 30086		Start Application 🧑 🤀 😩
	All   Pending   Approved   Pen-qualified     IV   Pending   Approved   Pen-qualified     IV   Example D, Mobile, Name etc     IV   Files   ILST 30 DAYS     Apple Bowers   Example D, Mobile, Name etc     IV   Files   ILST 30 DAYS     Apple Bowers   Example D, Mobile, Name etc     Apple Overs   Example D, Mobile, Namet	Select a customer name from the list.	Snap Customer Support	April Bowers B54-83-900 PENDING   Julis Gomes B54-876-9933 Image: Comparison of the state B54-876-9933 Image: Comparison of the state B54-876-9933   Jason Periman 096-83-9932 Image: Comparison of the state B34-893-9933 Image: Comparison of the state B34-893-9933   Julis Gomes 234-983-9933 Image: Comparison of the state B34-893-9933 Image: Comparison of the state B34-893-9933	Name etc Submitted by Adam Chan   E-Comm Checked Life   03/22/23, 03/2 Customer Name Phone Number Em	Arrever all Address hang@email.com

#### Reduced friction to avoid opening multiple dialogs or different pages.



#### Re-usable UX Pattern across the pages.

	Welcome Mattress King Merchant ID: 30086							Start Application	⊘ ∉	) Ó
DASHBOARD	Reports	Funding Rep	oorts							
	Report Type V Funding Report	Q Search							Downle	pad 🔯
47	Choose Location	Customer Name	Application ID	Trace Number	Invoice Number	Approval Amount	Sub Total	Sales Tax	Total Invoice Amount	Processing Fees
EDGE LEADS	Bank Account	Allen Josh	2306180M2GA	F2986086535	-	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
ŏ	BOA BANK & CHIME & +1	Adolfo Almendra	2306180M2GC	F2076086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
TRAINING	Report Date	Brian Zeichick	8306180M2GA	F1976086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
P	Previous Day Last 30 Days Custom	Ryan Ball	2906180M2GA	F9976086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
MARKETING		Mo Avalos	2306180M2GA	F2976086530	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
		Dylan Ballard	4306180M2GA	F2976086321	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
	Reset Generate Report	John Basso	9306180M2GA	F2096086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
ADMIN		James Brown	1306180M2GA	F2846086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
		Autumn Brown	8306180M2GA	F2976080535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
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### Reporting with same pattern