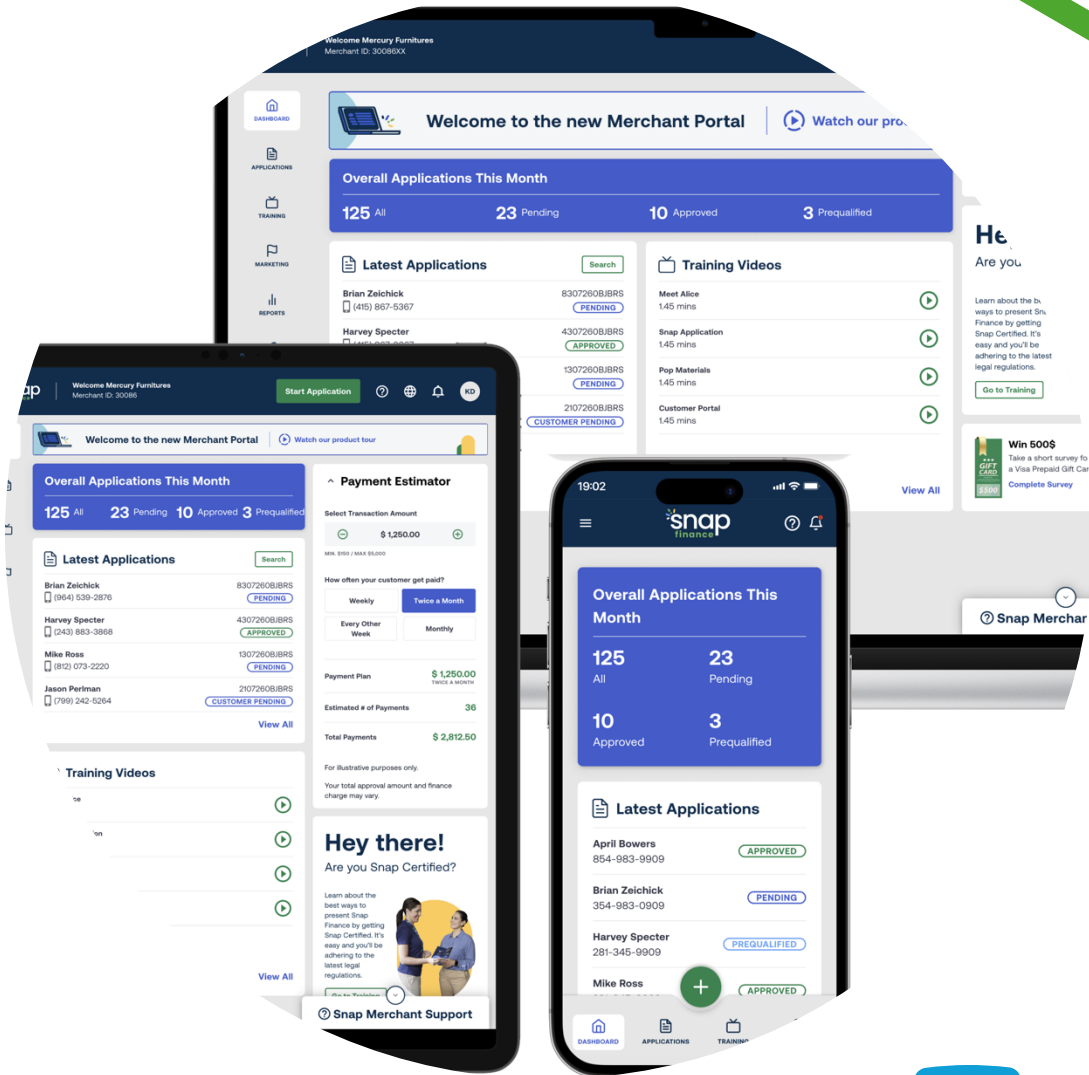


# Merchant Portal 3.0 User Experience Design

By Karthikeyan Dhanasekaran  
Principal UX Designer  
Snap Finance Inc



Good Morning, 6731 Store in Town  
Merchant ID: 6731

**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 **\$152,298.00** 🧑‍🚒 are waiting! [Learn more](#)

My Customers **edge**

🔍 Search Applications

Search by Name, Application ID, Phone...

Location Location 1

Salesperson Select A Salesperson

Date Range 06/01/2020 - 08/14/2020

Showing 20 / 51 Results

Application ID	Name	Mobile Number	🔗 Application Status
● 20080606M3TX	Tyler Doe	(555) 555-5555	Inactive
● 20080606M3TX	Tyler Doe	(555) 555-5555	○ Approved
● 20080606M3TX	Tyler Doe	(555) 555-5555	Inactive

Email Address: -

Channel: SMS

Created: 3/11/2020

Submitted: 3/11/2023

Inactivated: 01/12/2024

Salesperson: **EDIT** Norman D

ADD NOTE

Denied

**Win \$500!**  
Complete a short survey for a chance to win a Visa Prepaid Gift Card  
[Click here to get started](#)

**edge Revenue**  
(Year to Date)  
**\$0**  
[Learn More](#) [Leads 0](#)

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 **\$152,298.00** 🧑‍🚒 are waiting! [Learn more](#)

stomers **edge**

🔍 Search Applications

Search by Name, Application ID, Phone...

Location Location 1

Salesperson Select A Salesperson

Date Range 06/01/2020 - 08/14/2020

51 Results

Application ID	Location (MID)	Name	Mobile Number	🔗 Application Status
606M3TX	Location 1 (6731)	Tyler Doe	(555) 555-5555	Withdrawn
606M3TX	Location 2 (4731)	Tyler Doe	(555) 555-5555	○ Approved
606M3TX	Location 3 (6701)	Abbie Wilson	(555) 555-5555	✓ Completed
606M3TX	Location 4 (8701)	Tyler Doe	(555) 555-5555	Denied
606M3TX	Location 6 (9701)	Tyler Doe	(555) 555-5555	⚠ Pending Signed Docs
606M3TX	Location 7 (9901)	Tyler Doe	(555) 555-5555	⚠ Pending Delivery
606M3TX	Location 8 (9961)	Tyler Doe	(555) 555-5555	🛑 Pending Completion

**Win \$500!**  
Complete a short survey for a chance to win a Visa Prepaid Gift Card  
[Click here to get started](#)

**edge Revenue**  
(Year to Date)  
**\$0**  
[Learn More](#) [Leads 0](#)

**Application Status**

🔗 Withdrawn 3

**Submission Channels**

🔗 Merchant 3

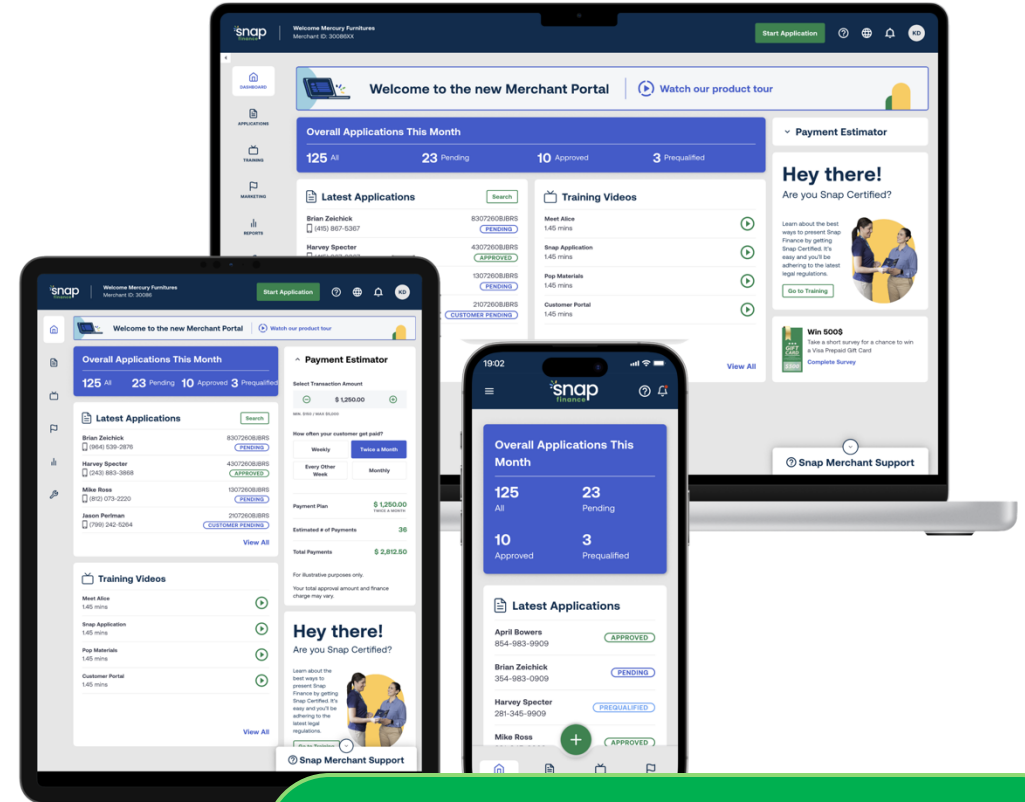


Old Design Screenshots

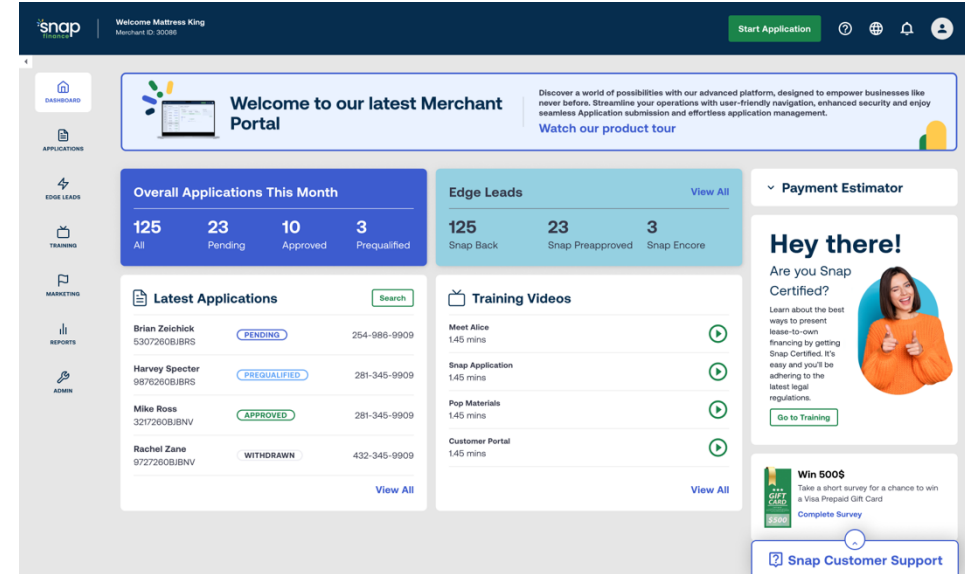
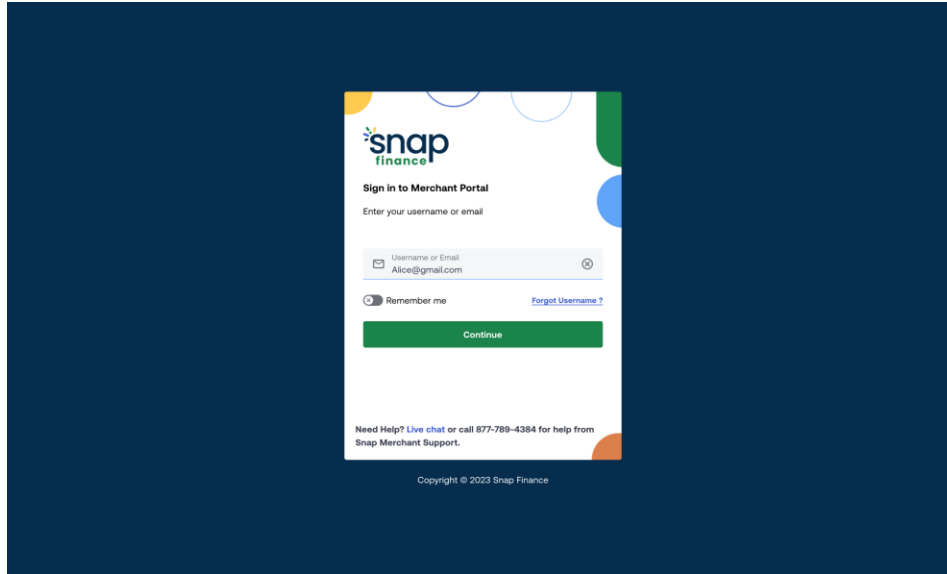
# New User Experience Design – Mobile First Approach

## Design Strategy

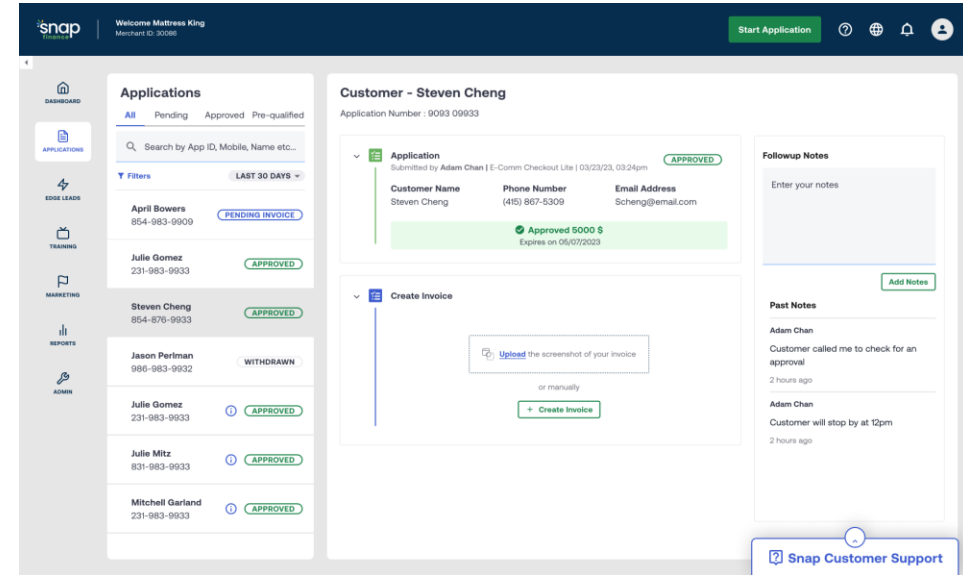
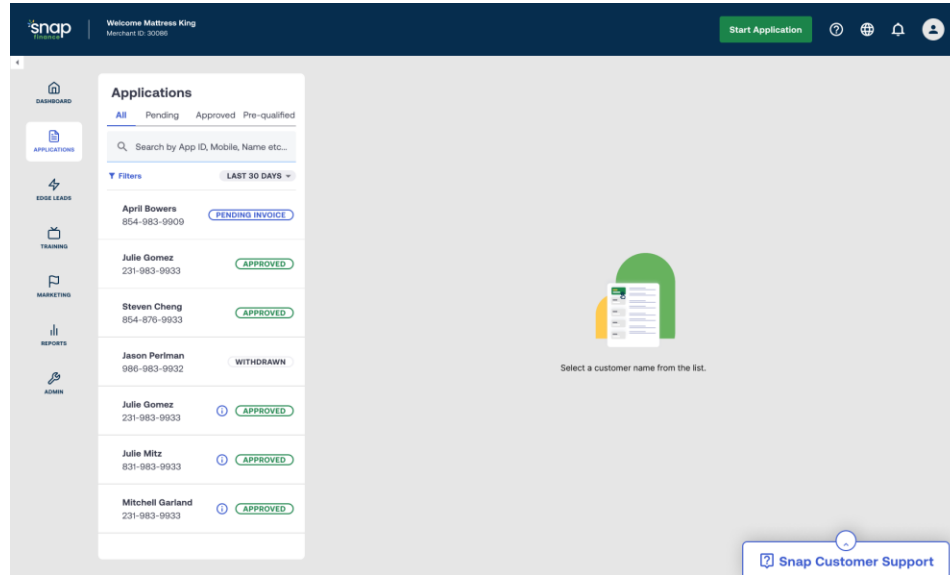
- **Gather insights and pain points through User Research**
- **Task Analysis and Prioritization to understand what is important to our customers**
- **Defined Success Criteria**
  - ✓ More Origination to LTO and LOAN
  - ✓ Streamlined Navigation
  - ✓ Task Reduction Time to complete the key tasks
  - ✓ 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.



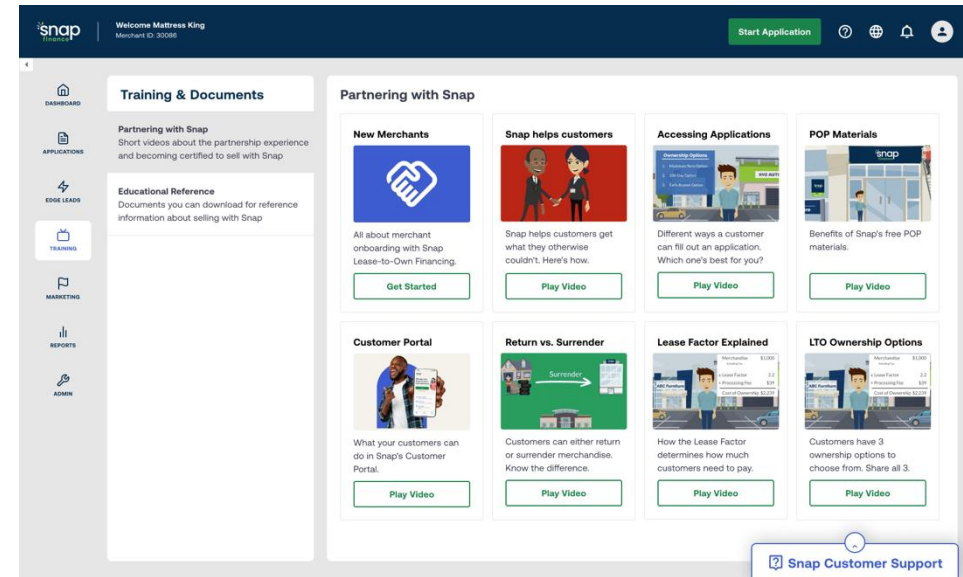
Merchants Feedback – New Portal is very simple to USE, More Streamlined, No Learning Curve.



Re-usable Interaction Design Pattern,



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

DASHBOARD

APPLICATIONS

EDGE LEADS

TRAINING

MARKETING

REPORTS

ADMIN

Reports

Report Type  
Funding Report

Choose Location  
LOCATION 1 LOCATI 2 +1

Bank Account  
BOA BANK CHIME +1

Report Date  
Previous Day Last 30 Days Custom

ResetGenerate Report

Funding Reports

Search

Download

Customer Name	Application ID	Trace Number	Invoice Number	Approval Amount	Sub Total	Sales Tax	Total Invoice Amount	Processing Fees
Allen Josh	2306180M2GA	F2986086535	-	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
Adolfo Almendra	2306180M2GC	F2076086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
Brian Zeichick	8306180M2GA	F1976086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
Ryan Ball	2906180M2GA	F9976086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
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
John Basso	9306180M2GA	F2096086535	1	\$ 4,120.00	\$ 4,120.00	\$ 0.00	\$ 4,120.00	\$ 4,120.00
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

Snap Customer Support

Reporting with same pattern