

# FIRST AMERICAN IGNITE



# IGNITE

Escrow Desktop Application (Angular)

Role: UXD Lead

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Ignite is First American's flagship escrow application. There are 4 personas that use Ignite: Real Estate Buyers, Real Estate Sellers, Real Estate Agents, and Escrow Officers. The goal of Ignite is to facilitate the process of transferring funds from the home buyer to the home seller. Before Ignite, the closing process was done through a series of emails. This less than secure method of communication posed great risks to the buyer. Risks that the buyer was completely unaware of. That risk is fraud.

# ELIMINATE FRAUD



# My Approach

01

**Enterprise Design Analysis**

02

**Heuristic Evaluation**

03

**Stakeholder Interviews**

04

**Design Thinking Workshops**

05

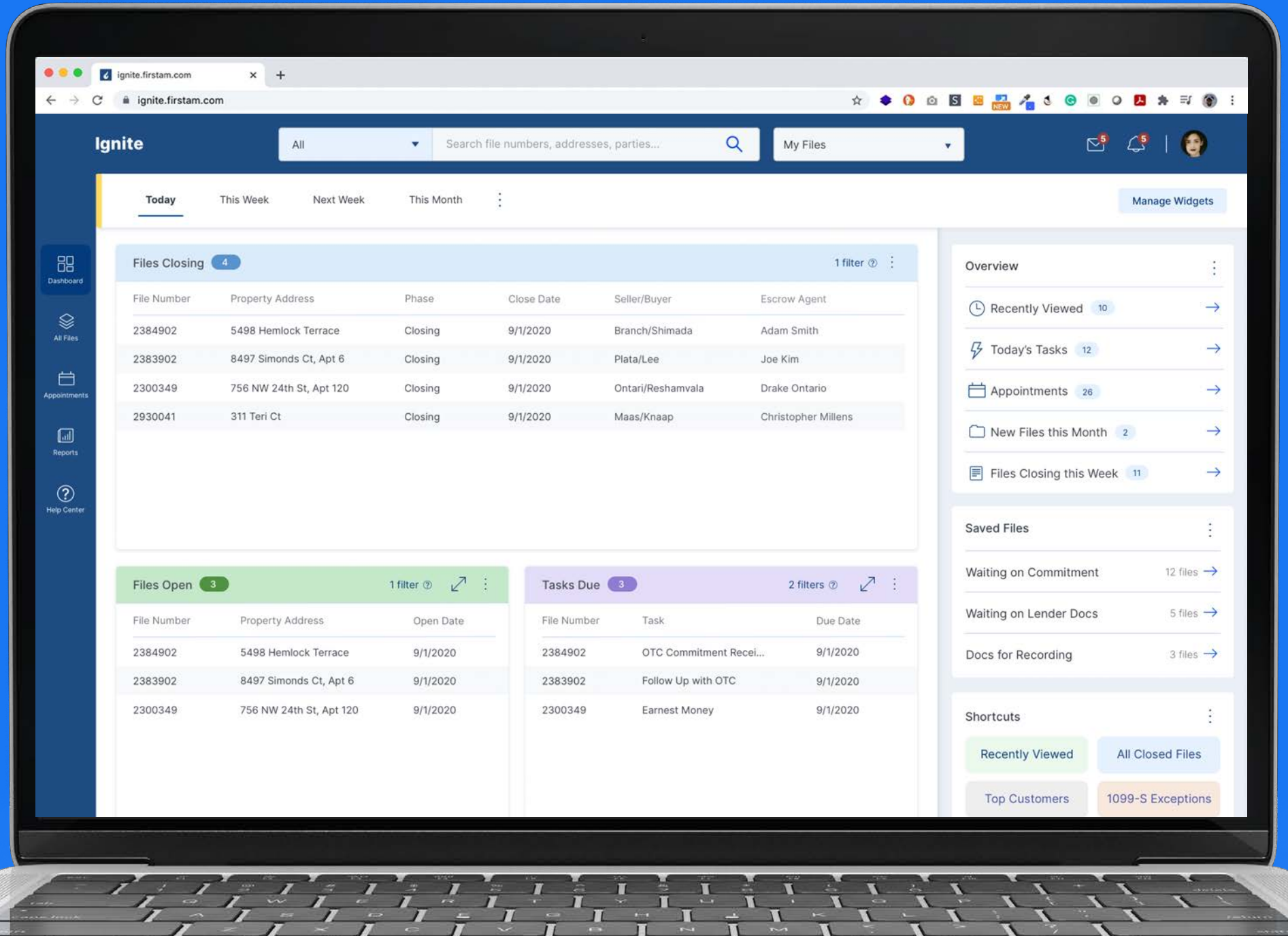
**Qualitative User Testing**

06

**Feature Refinement**

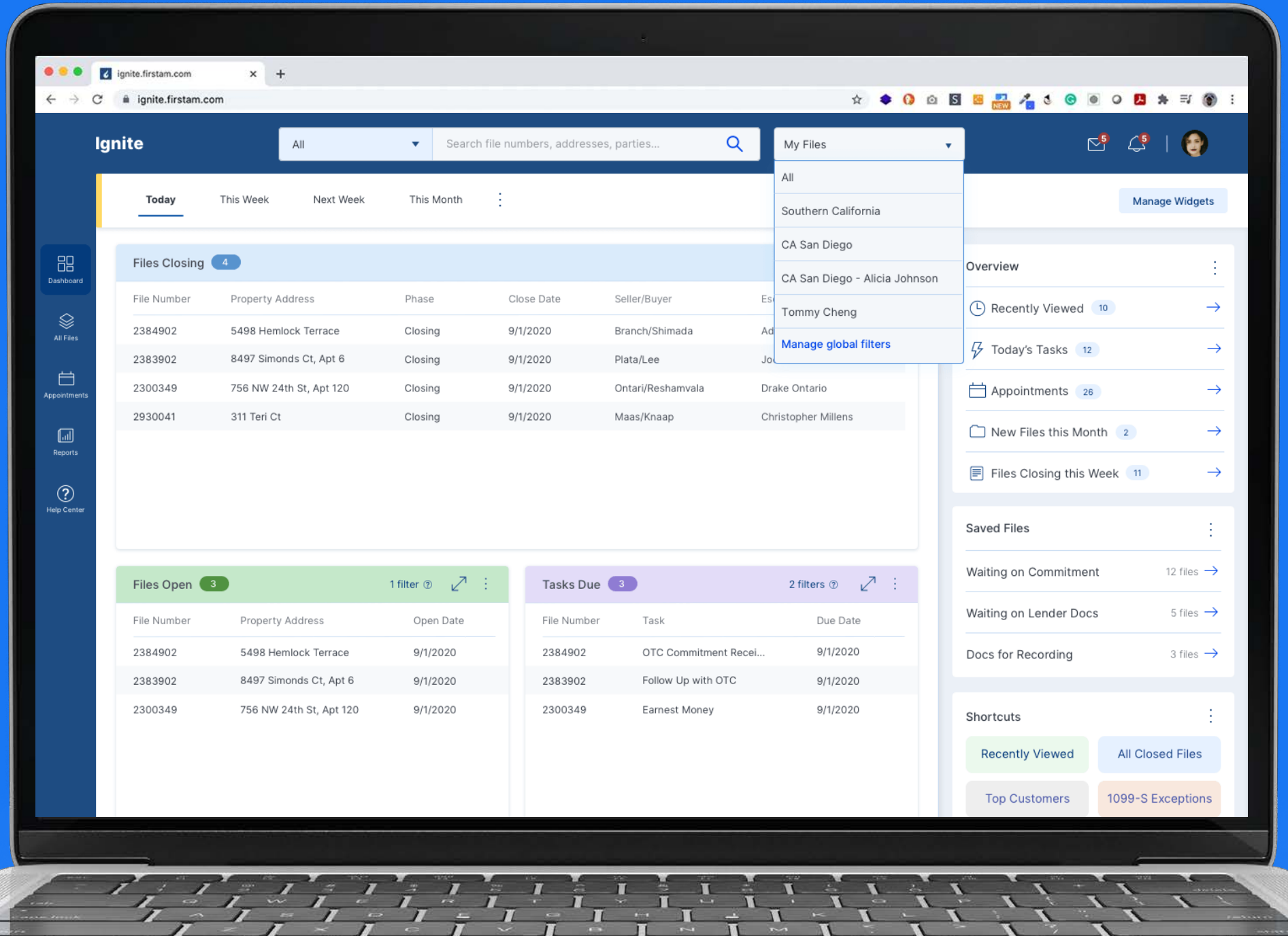
# FEATURES

- Fully Customizable Dashboard
- Clean and intuitive file structure
- Access to all files at all times
- All appointments in one place
- Secure messaging between agent, buyer, and seller
- Reports and historical archives



# MY FILES

Users can quickly navigate to their pre-selected regional filters



## EDIT TIMEFRAMES

Users can customize the dates that are shown at the top level of their Dashboard

The screenshot shows the Ignite dashboard interface. At the top, there's a navigation bar with the Ignite logo, a search bar, and a 'My Files' dropdown. Below this, there are tabs for 'Today', 'This Week', 'Next Week', and 'This Month'. A dark button labeled 'Edit Timeframes' is positioned above the main content area.

The main content area features three tables:

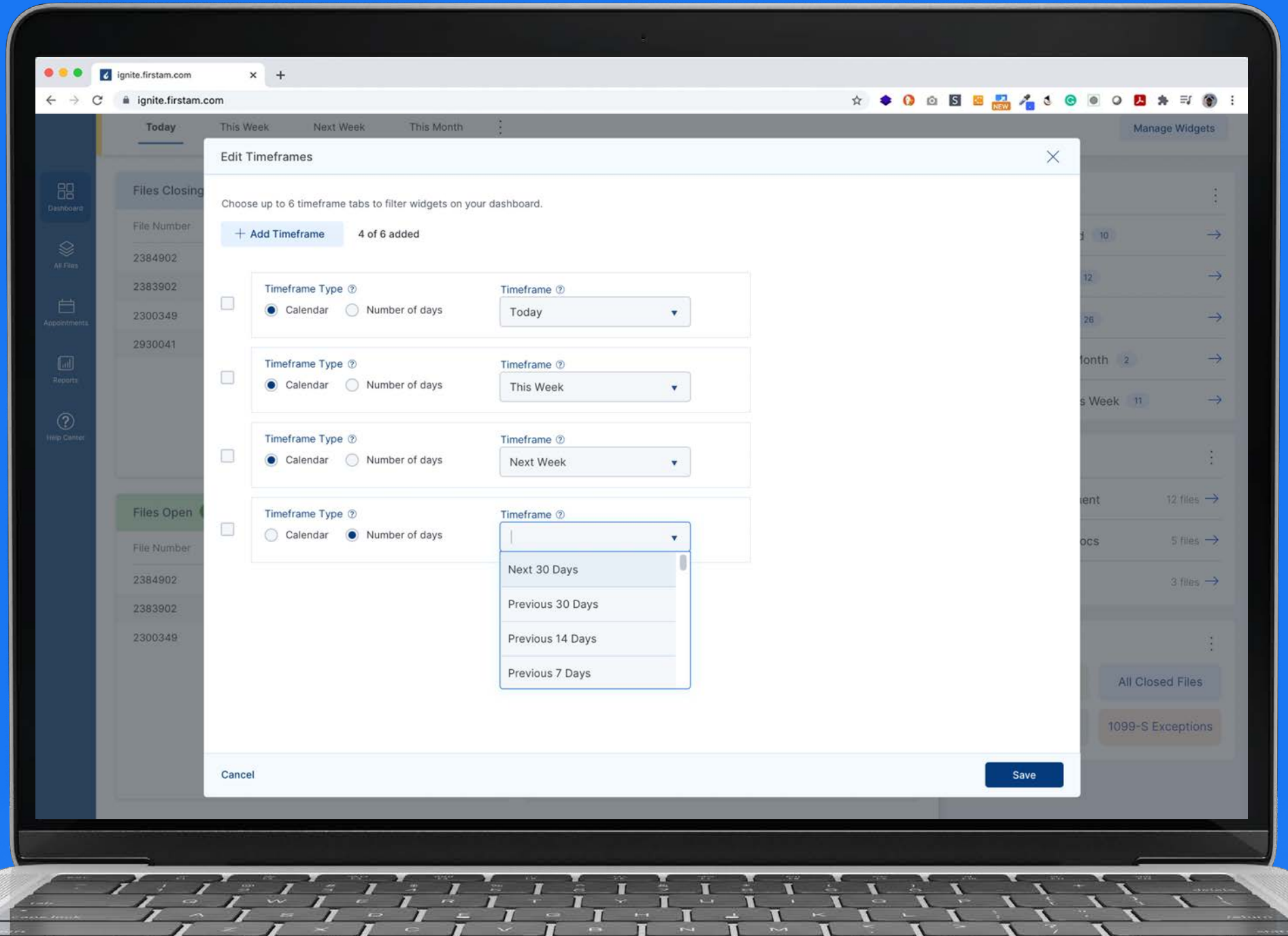
- Files Closing (4):** A table with columns: File Number, Property Address, Phase, Close Date, Seller/Buyer, and Escrow Agent. It contains four rows of data.
- Files Open (3):** A table with columns: File Number, Property Address, and Open Date. It contains three rows of data.
- Tasks Due (3):** A table with columns: File Number, Task, and Due Date. It contains three rows of data.

On the right side, there's a sidebar with 'Manage Widgets' and several overview cards: 'Recently Viewed (10)', 'Today's Tasks (12)', 'Appointments (26)', 'New Files this Month (2)', 'Files Closing this Week (11)', 'Saved Files', 'Waiting on Commitment (12 files)', 'Waiting on Lender Docs (5 files)', 'Docs for Recording (3 files)', and 'Shortcuts' (Recently Viewed, All Closed Files, Top Customers, 1099-S Exceptions).

On the left side, there's a vertical navigation menu with icons for Dashboard, All Files, Appointments, Reports, and Help Center.

## EDIT TIMEFRAMES

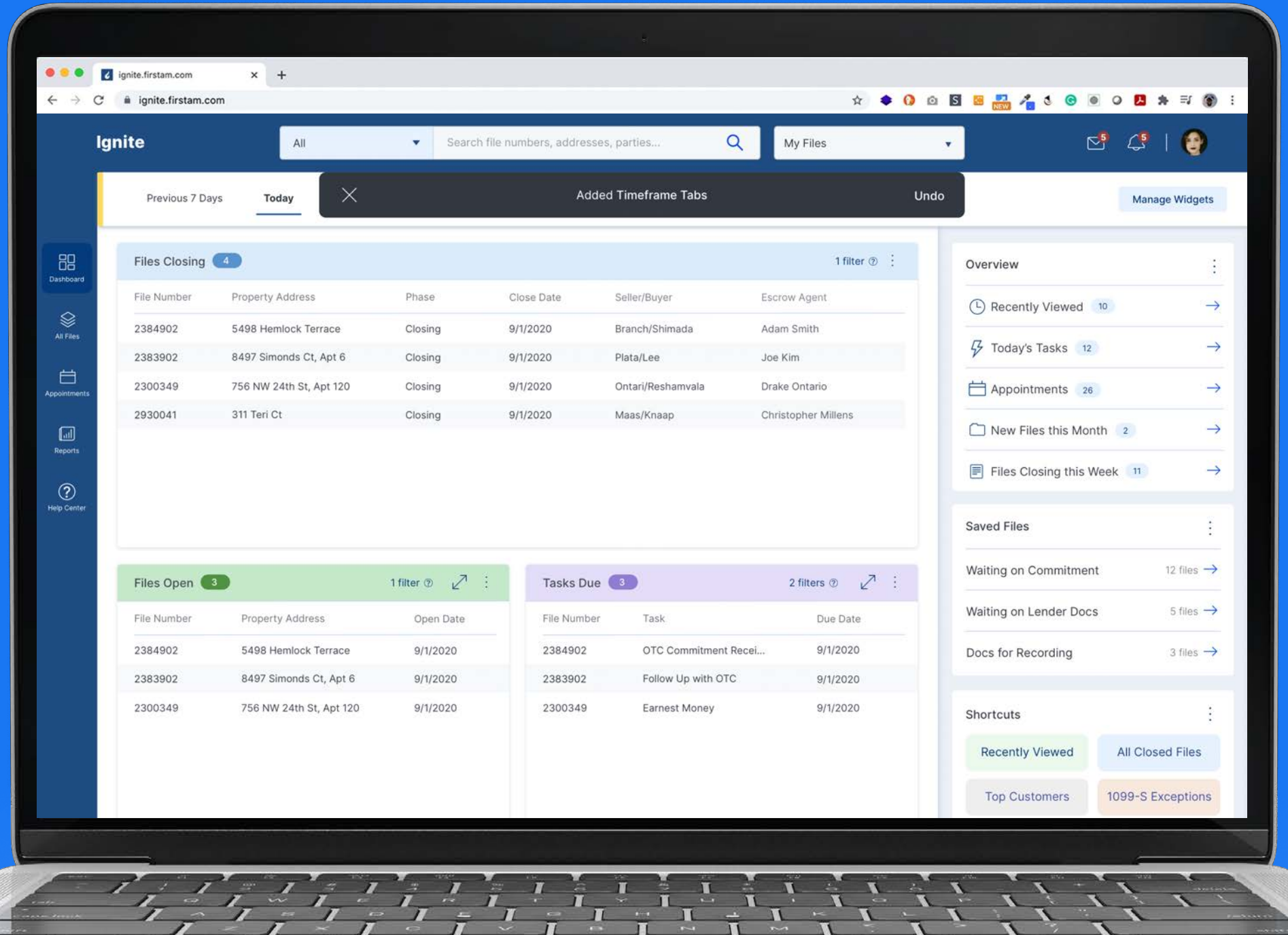
In the default setup the user can see Today, This Week, Next Week, and this Month. This feature allows them to add the Previous 7 Days





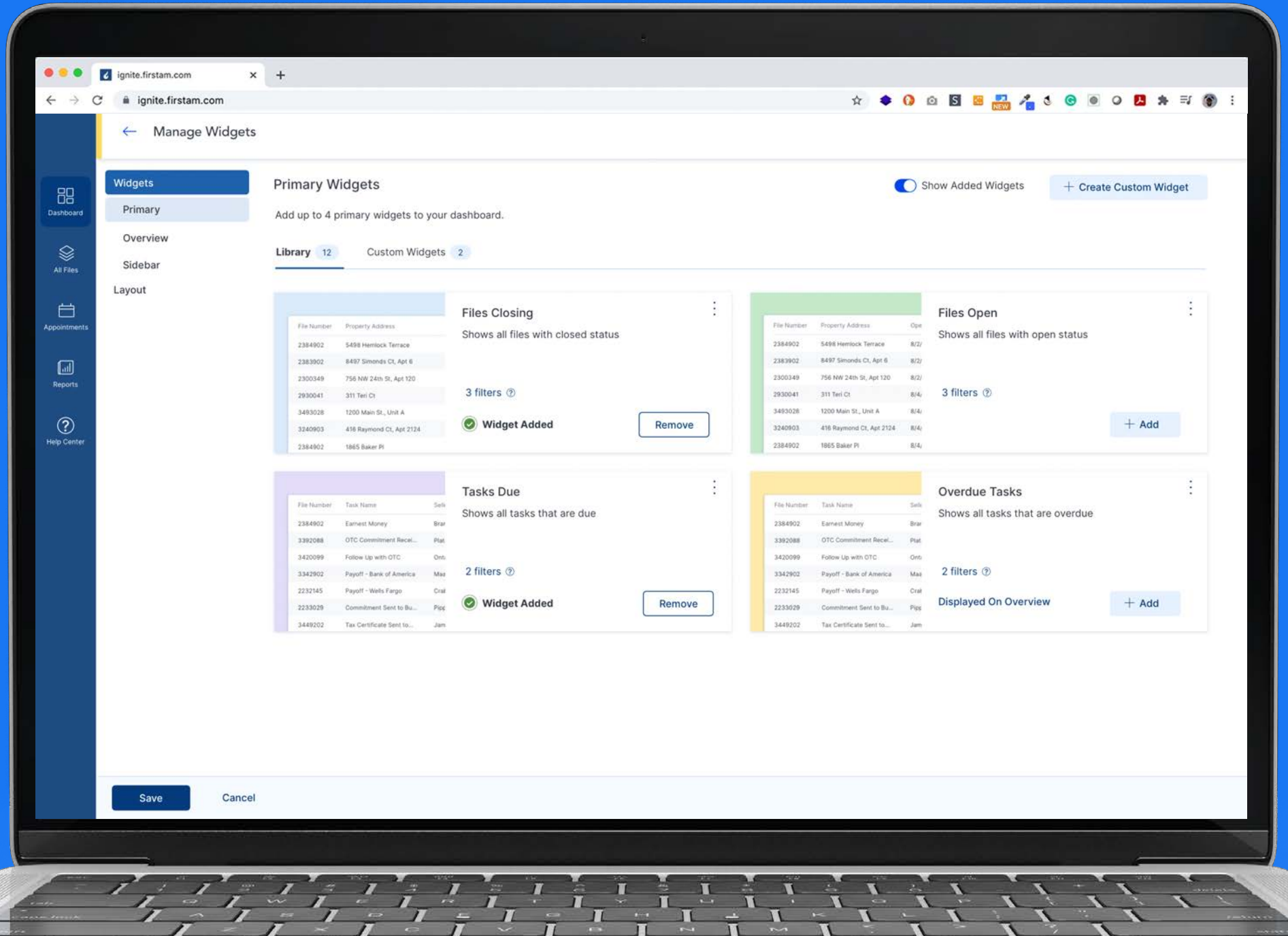
## EDIT TIMEFRAMES

Once added, the system alerts the user to the completion of the task by way of a confirmation toast and Previous 7 Days is now visible within the timeframe



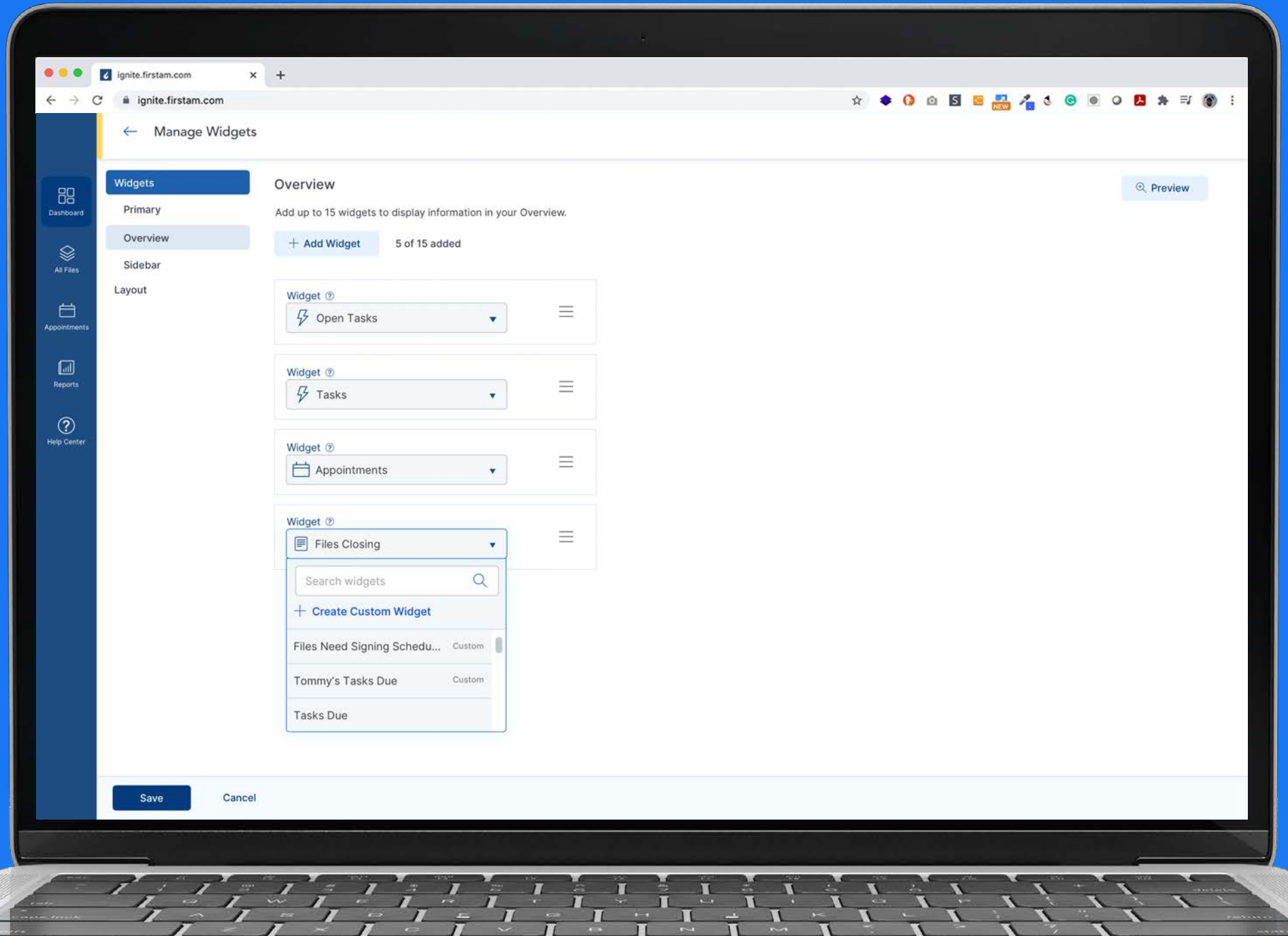
# MANAGE WIDGETS

Complete control and customization of Dashboard widgets



# MANAGE WIDGETS

The user can control how many widgets they want in their Dashboard in addition to selecting which widgets are shown



## MANAGE SIDEBAR

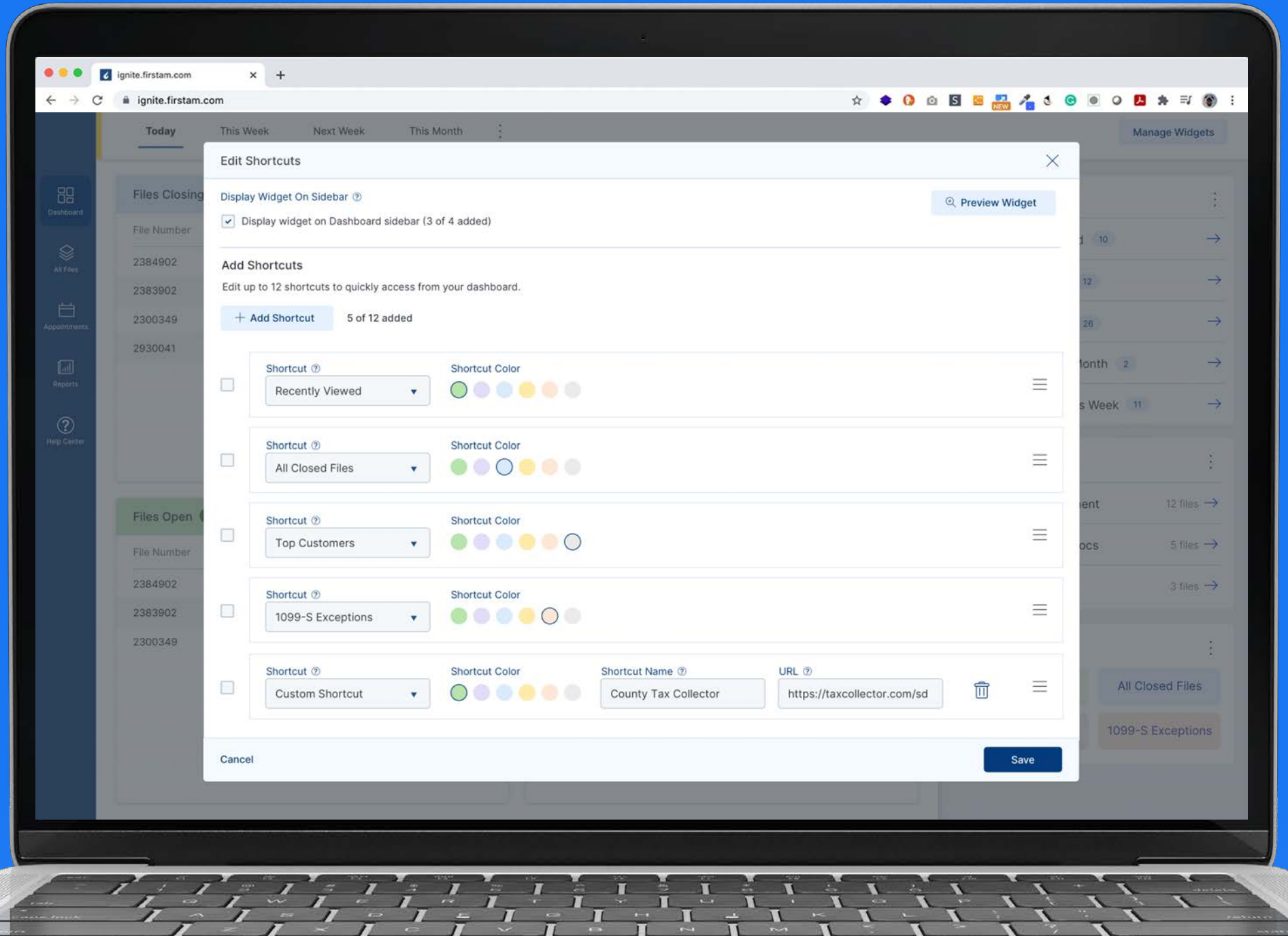
The user also has complete control over the data that is shown within the sidebar

The screenshot displays the Ignite FirstStep dashboard interface. On the left, a dark sidebar contains navigation icons for Dashboard, All Files, Appointments, Reports, and Help Center. The main content area is titled 'Today' and features a 'Manage Widgets' button in the top right. It is divided into several sections:

- Files Closing (4):** A table with columns: File Number, Property Address, Phase, Close Date, Seller/Buyer, and Escrow Agent. It lists four entries for closing on 9/1/2020.
- Files Open (3):** A table with columns: File Number, Property Address, and Open Date. It lists three entries for opening on 9/1/2020.
- Tasks Due (3):** A table with columns: File Number, Task, and Due Date. It lists three tasks due on 9/1/2020.
- Overview:** A summary section with widgets for Recently Viewed (10), Today's Tasks (12), Appointments (26), New Files this Month (2), and Files Closing this Week (11).
- Saved Files:** A section with widgets for Waiting on Commitment (12 files), Waiting on Lender Docs (5 files), and Docs for Recording (3 files).
- Shortcuts:** A section with widgets for Recently Viewed and Top Customers. A context menu is open over the Top Customers widget, showing options: Edit, Share, Replace, and Remove.

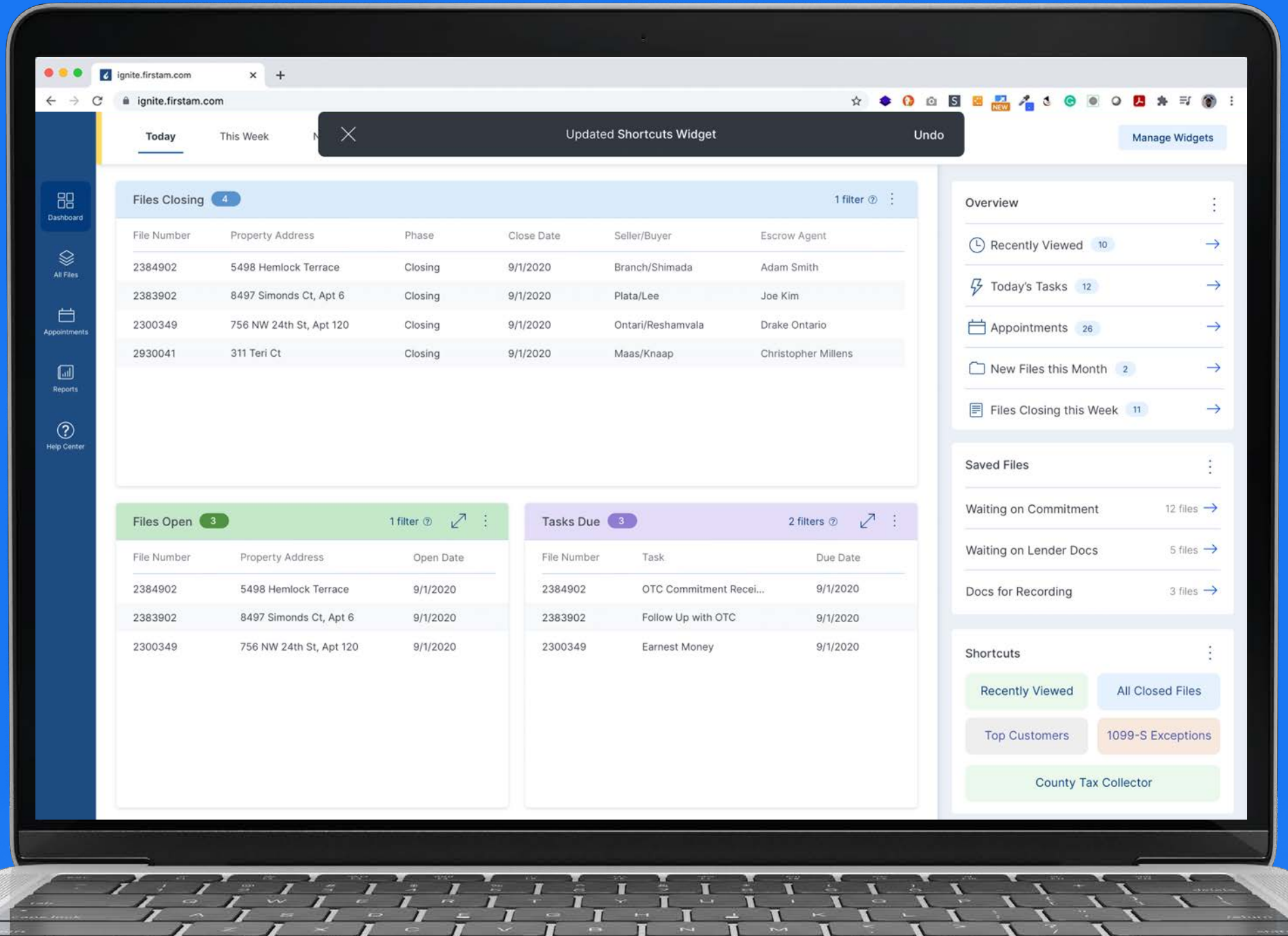
## MANAGE SIDEBAR

In this example, the user is adding a fifth shortcut called County Tax Collector



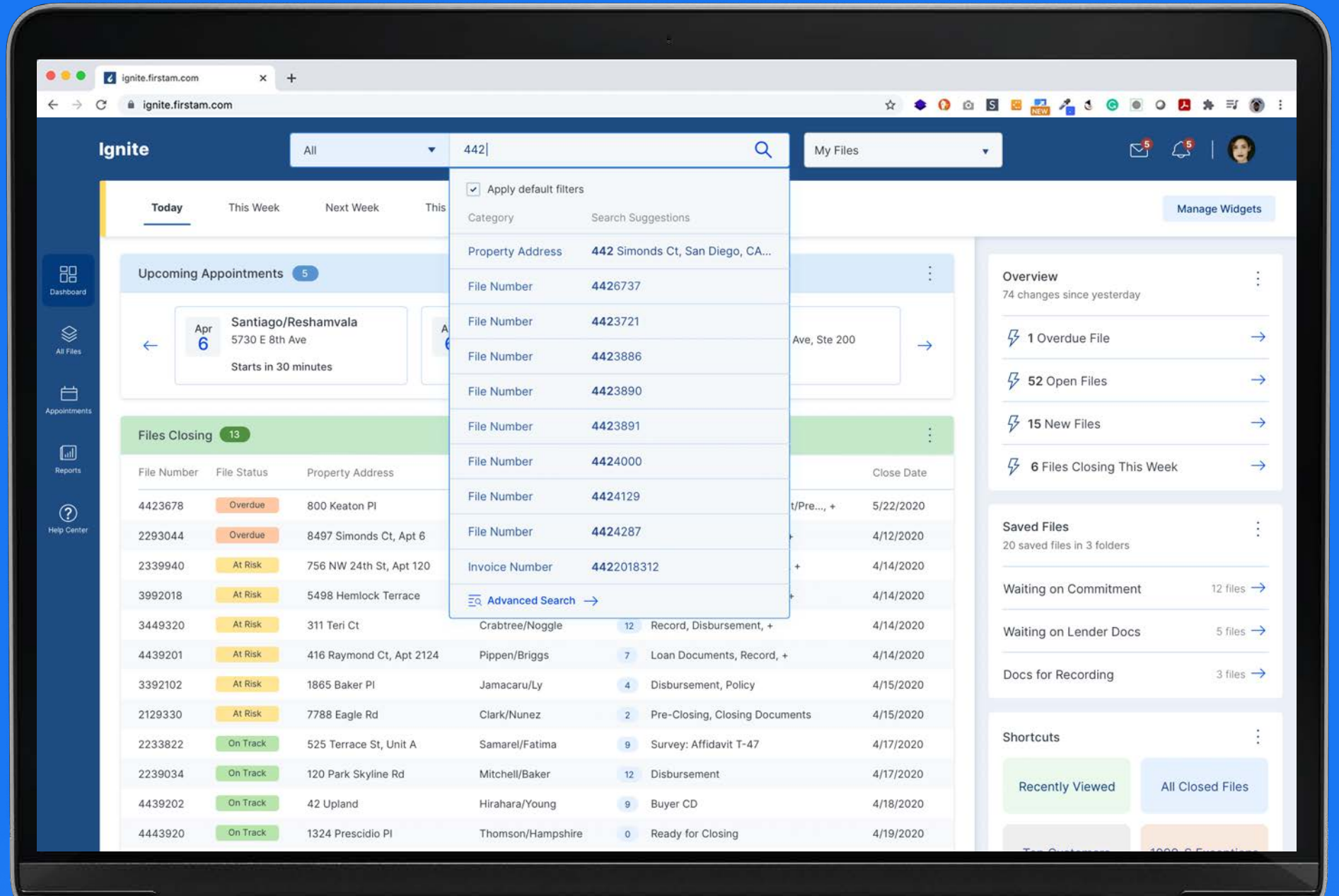
# MANAGE SIDEBAR

Once added, the system alerts the user to the completion of the custom shortcut



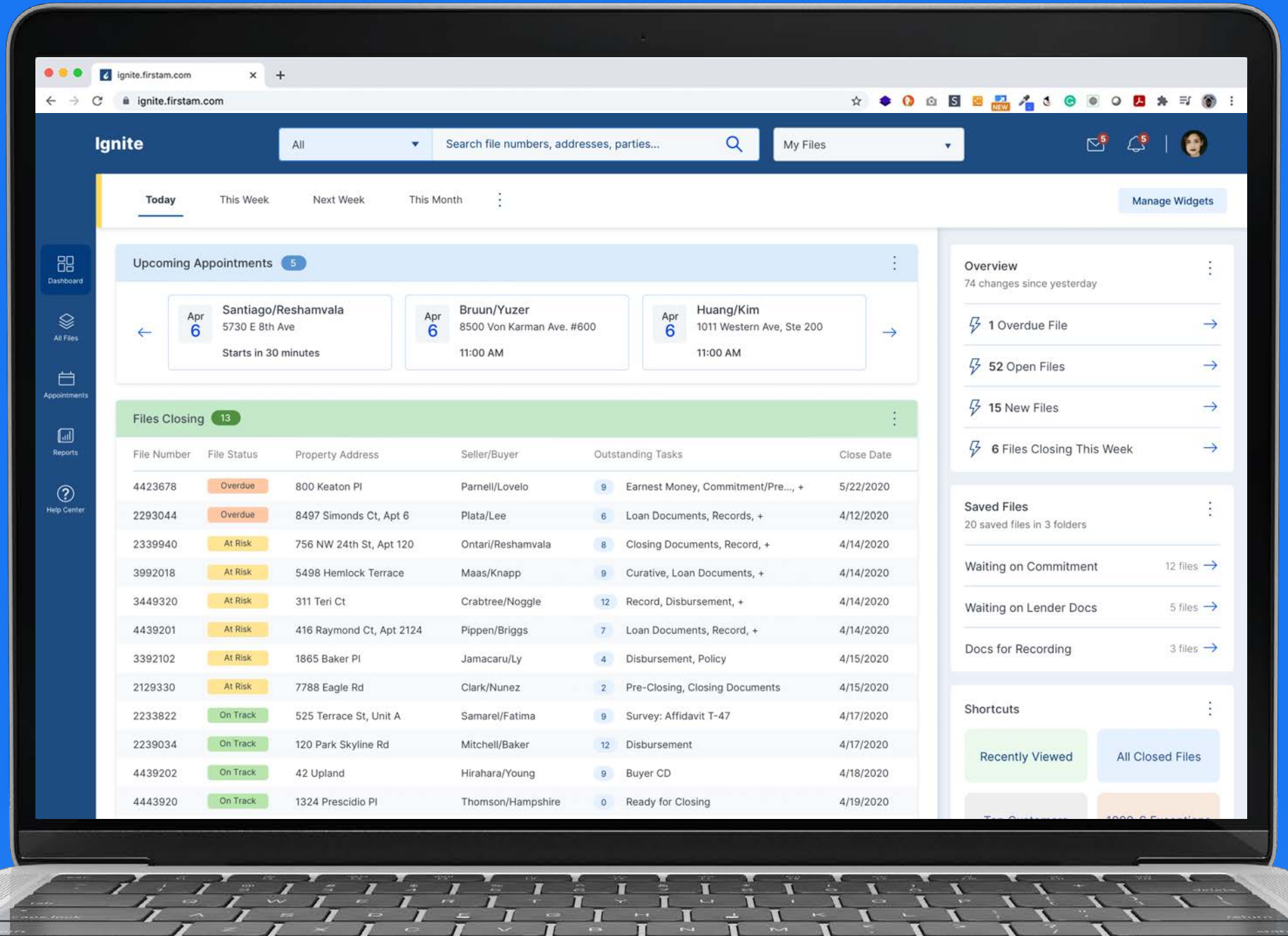
# SMART SEARCH

Quickly find any and every file by searching the API powered file archive



# APPOINTMENTS

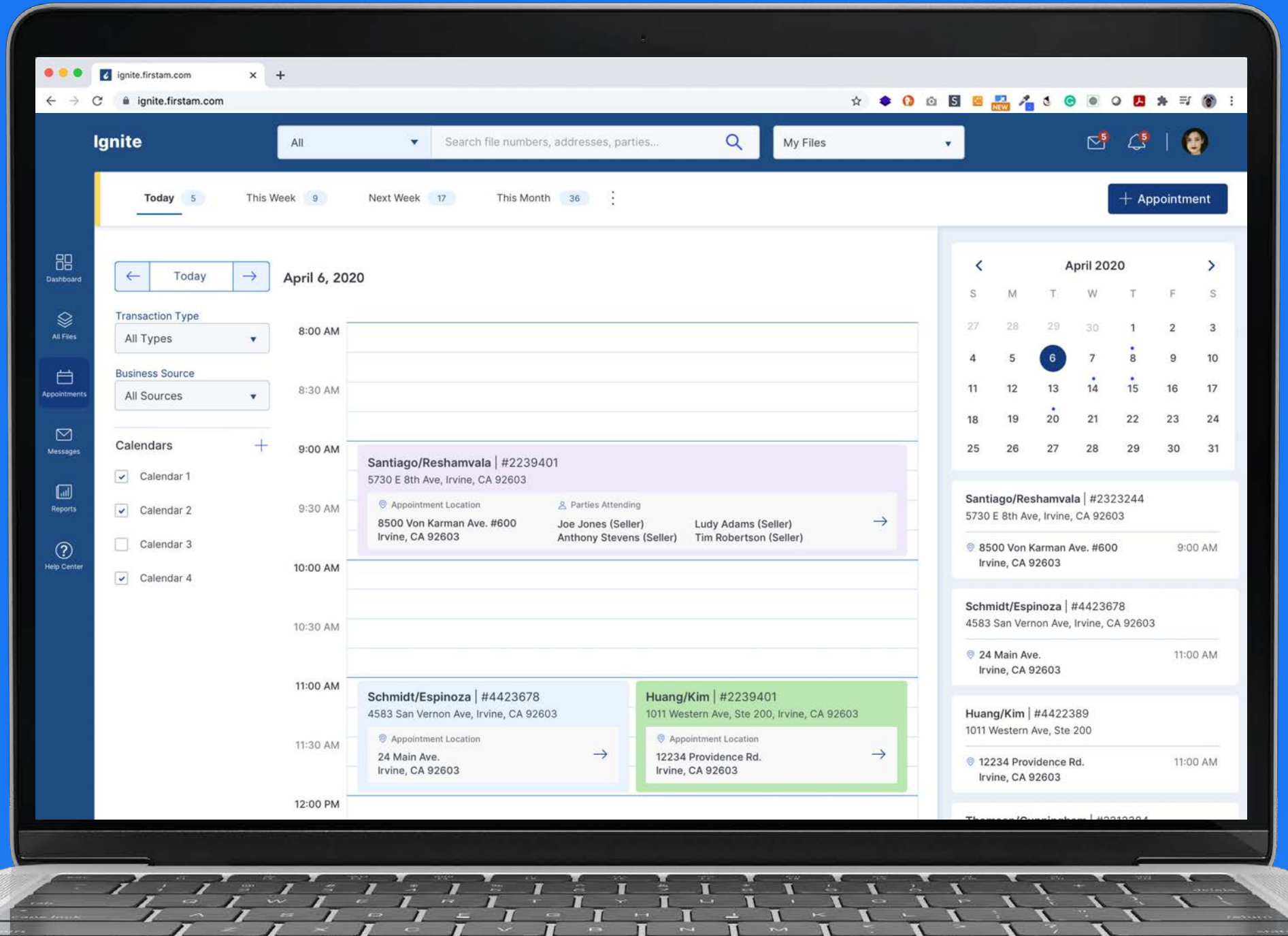
Today view includes the user's calendar to streamline efficiency





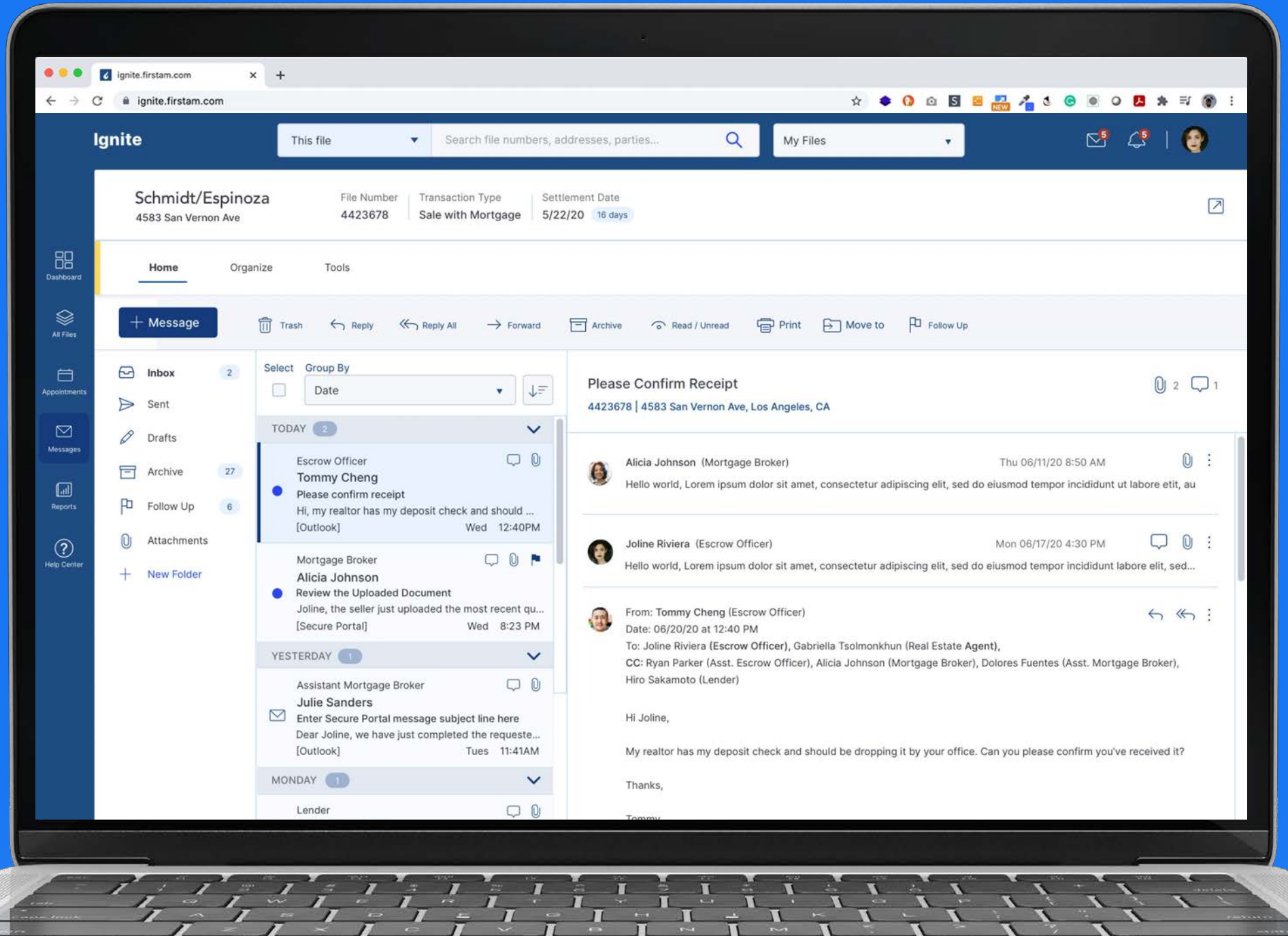
# APPOINTMENTS

Today view includes the user's calendar to streamline efficiency



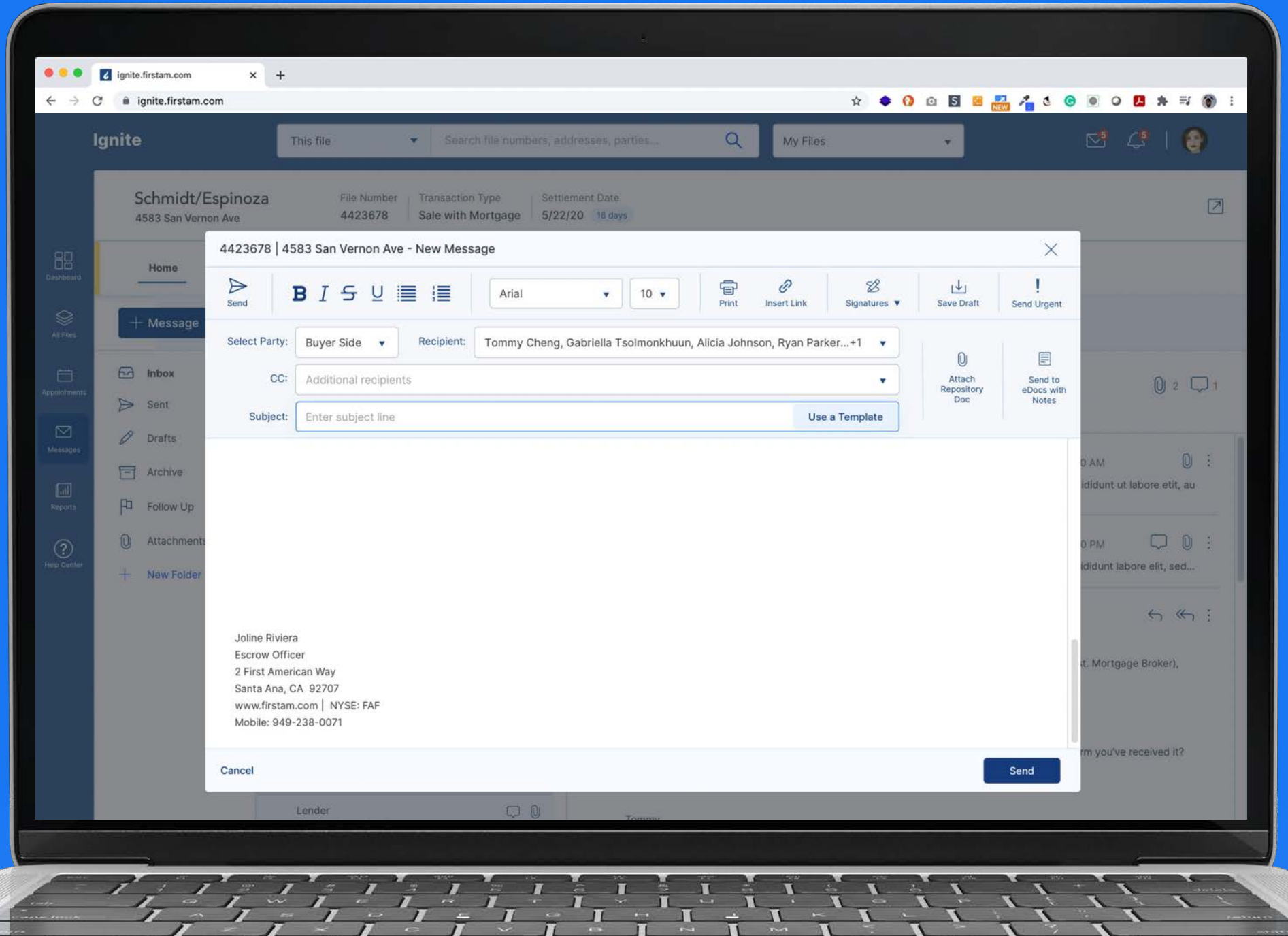
# MESSAGE CENTER

Secure end-to-end encrypted messaging platform to prevent malicious interception



# MESSAGE CENTER

Messaging utilizes Two Factor Authentication



# ENTERPRISE VERSUS CONSUMER DESIGN

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**Objectives**

01

**Understand the difference between consumer and enterprise design so we can best leverage the existing work done for FA Portal.**

02

**Identify key opportunities and interaction patterns within dashboard experiences.**

03

**Focus on experiences and features that will increase efficiency and ease of use.**

## KEY DIFFERENCES

### Key Differences

#### **Focusing on the organization vs. focusing on the individual**

Consumer technology is aimed at serving individuals, while enterprise software needs to accommodate large organizations with complex processes.

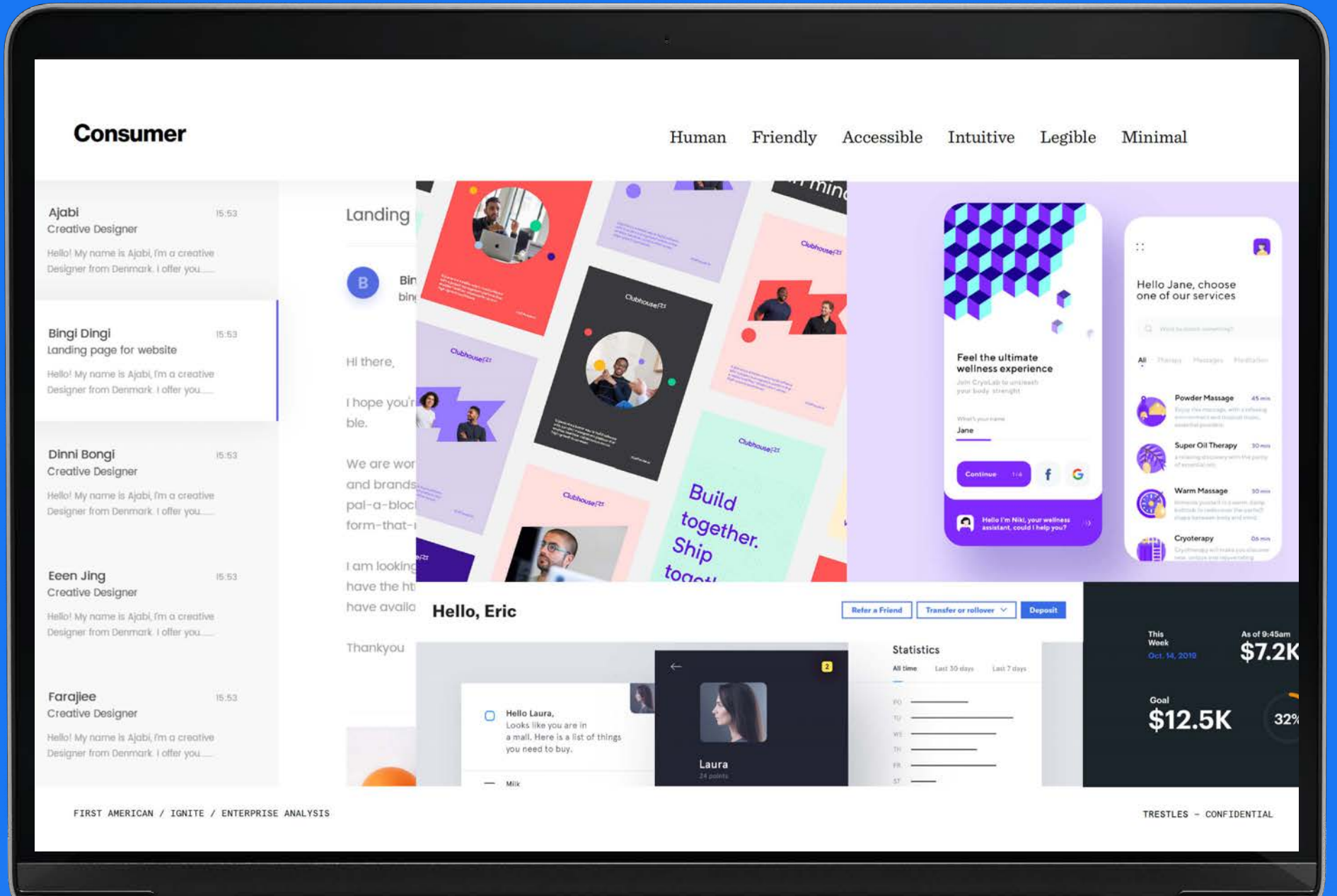
#### **Designing for workflows vs. designing for a specific need**

Designing enterprise applications means designing a system of many interconnected workflows. Conversely, consumer apps often focus on addressing a targeted problem or under-met user need.

#### **Trading off engagement for efficiency**

Consumer applications need to be easily accessible and understandable to retain users. Employees will use enterprise applications day in and day out, so some tradeoffs, like sacrificing some learnability to increase efficiency, might be made.

# CONSUMER DESIGN



# ENTERPRISE DESIGN

**Enterprise** Utilitarian Functional Flexible Informative Efficient

**Key Metrics:**  
New Devices: 1,621 (+5.9%)  
Unique Devices: 3,403 (-6.2%)  
Average Visits: 52 min (+3.2%)  
Total Sessions: 10,321 (+1.2%)

**Call Queue:**  
2 Waiting, 33 In a Call, 6 Wrap-Up, 1 Ready  
Speed to Answer: 4 m  
Calls Abandoned: 3  
Calls Converted: 12  
Total Calls: 37

**Project Steps:**

Steps	Owner	Status	File	Timeline
Feature release	[Avatar]	Done	W	May 08 - June 09
Conference in New York	[Avatar]	Working on it		May 05 - May 23
Website redesign	[Avatar]	Stuck		May 01 - June 20

**Project Phases:**

Phases	Owner	Status	File	Timeline
New product manager	[Avatar]	Done	PDF	June 09 - June 22

**Task Lists:**

- TO DO (57)**
- Specs:** Headquarters wiring, Client meeting (Jul 9 - Jul 13)
- Back-end programming:** New Website - General, All tasks (Jul 9 - Jul 13)
- Bug fixing:** New Website - General, All tasks (Jul 16 - Jul 18)
- Finishing touches:** New Website - General, All tasks (Jul 23 - Jul 27)
- Analytics & Tag Manager:** New Website - General, All tasks (Jul 10)

FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS TRESTLES - CONFIDENTIAL



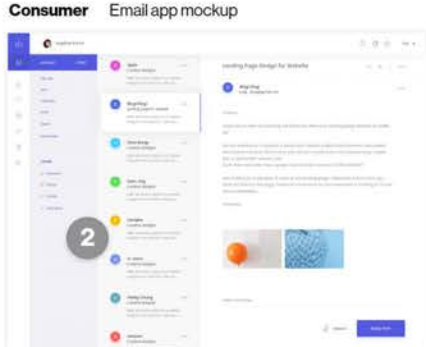
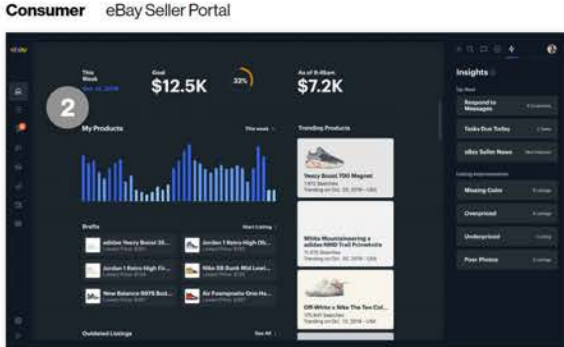
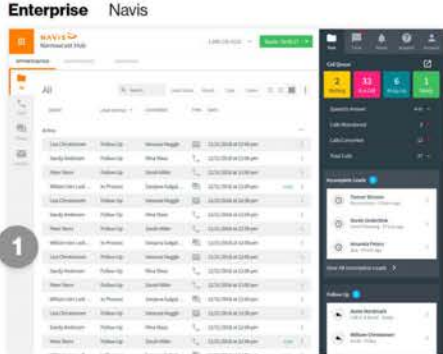
# ENTERPRISE VS. CONSUMER DESIGN

## SPACING

### ENTERPRISE VS. CONSUMER DESIGN

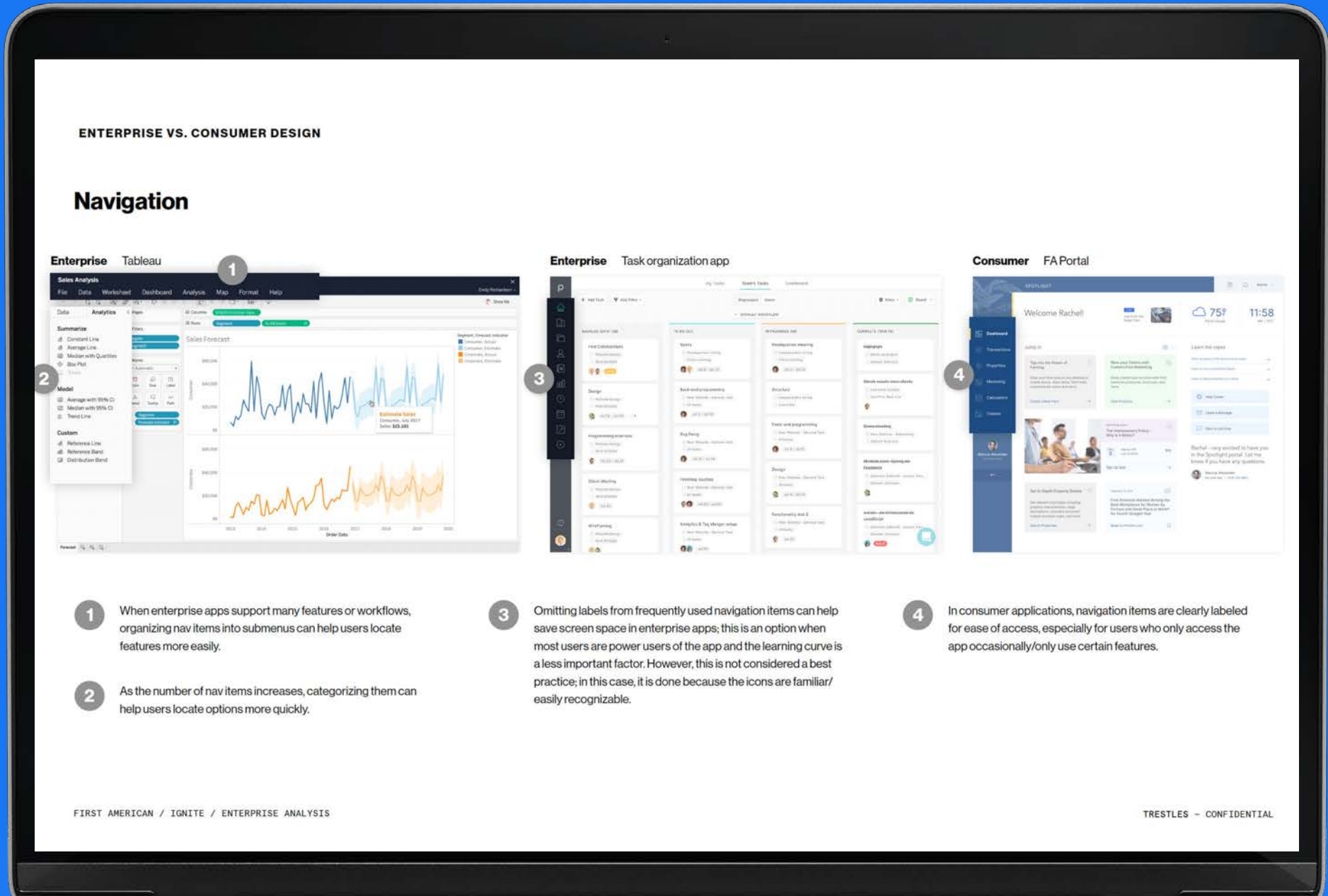
### Spacing

- 1 Enterprise tools typically have greater scope and are more complex than consumer applications, so information is usually more dense. Spacing in enterprise tools is tighter than that of consumer tools, but smart use of visual hierarchy can help keep information legible.
- 2 Generous spacing and judicious use of color/type can help consumer applications feel instantly accessible, as it is clear which elements the user should focus on first. Spacing is not as tight to increase ease of use and legibility in consumer apps, where there is usually less data to process.



# ENTERPRISE VS. CONSUMER DESIGN

## NAVIGATION



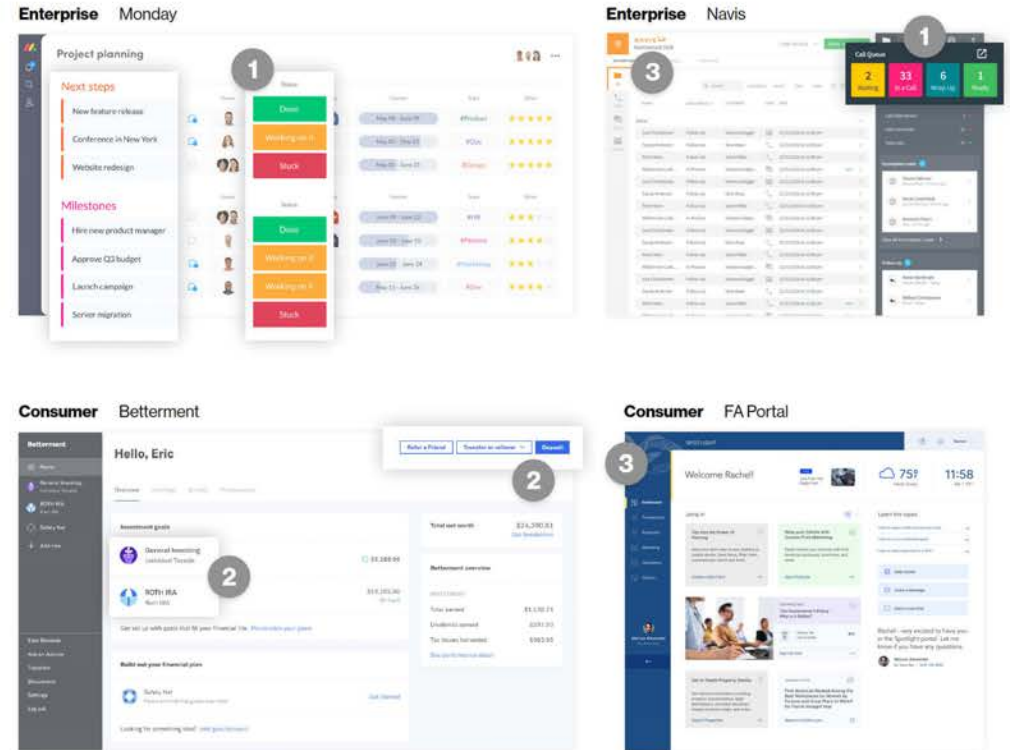
# ENTERPRISE VS. CONSUMER DESIGN

## COLOR

### ENTERPRISE VS. CONSUMER DESIGN

#### Color

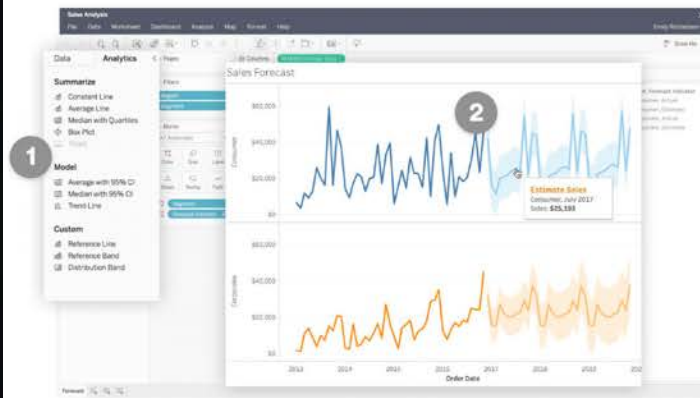
- 1 In enterprise dashboards, color is an important tool for calling out system status and differentiating dense modules of information. Color is also used to call out system status in consumer products, but to a lesser extent as there is typically less data to communicate.
- 2 In consumer apps, color is used primarily for calls to action and elements that add delight to the experience (for example, illustrations).
- 3 Using key brand colors in important page elements like the primary nav and calls to action helps to create a more cohesive brand experience.



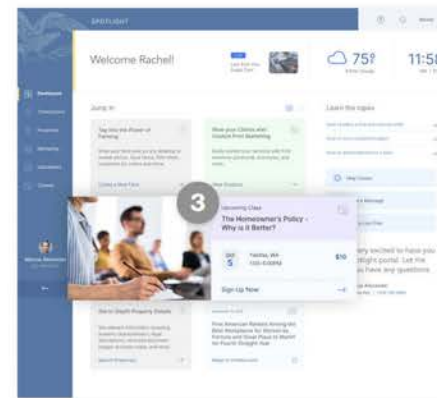
### ENTERPRISE VS. CONSUMER DESIGN

#### Imagery

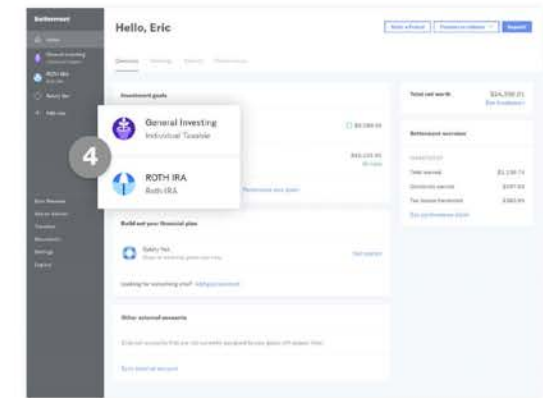
Enterprise Tableau



Consumer FA Portal



Consumer Betterment



1 Icons can help users recognize and locate tools and nav items, especially when there are many options available.

2 Imagery in enterprise dashboards is mostly utilitarian, including visualizations to help users understand data more clearly.

3 In consumer apps, imagery that is bright and human-focused can help the experience feel more personable. In this case, the image helps draw attention to featured content and make it seem more appealing.

4 Illustrations can also help a consumer experience feel more friendly when there isn't a need for a vast library of icons.

# ENTERPRISE VS. CONSUMER DESIGN

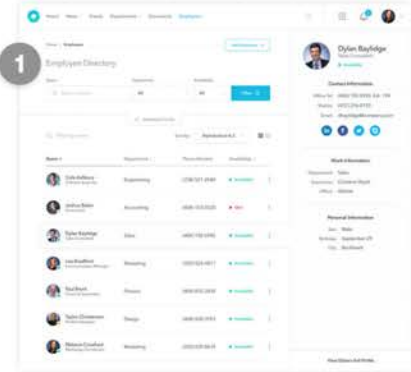
## TYPE

### ENTERPRISE VS. CONSUMER DESIGN

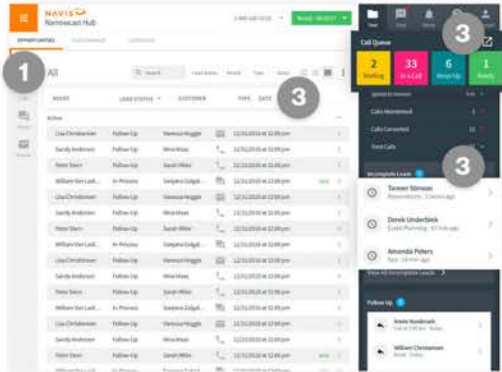
#### Type

- 1 In enterprise tools, headlines are generally used to inform the user of their current place in the app.
- 2 In consumer apps, bold headlines with friendly copy help the experience feel more human-centered and are not necessarily functional.
- 3 Enterprise apps generally will have a larger selection of type styles (a larger type ramp) in order to maintain visual hierarchy in an information-dense screen.

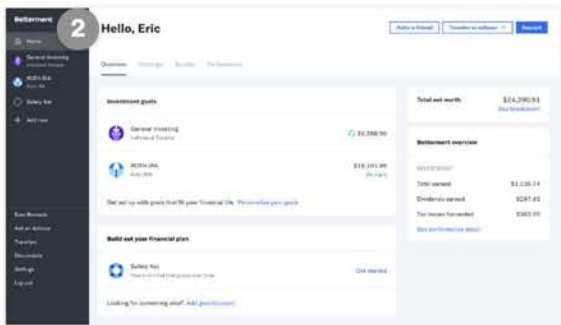
Enterprise Employee management platform



Enterprise Navis



Consumer Betterment



Consumer FA Portal

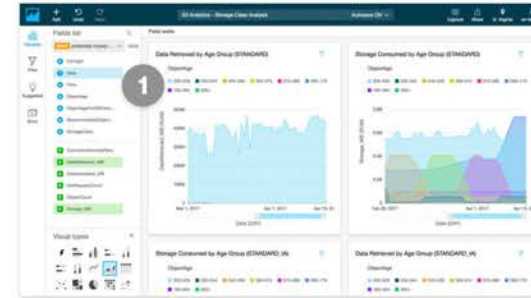


### ENTERPRISE VS. CONSUMER DESIGN

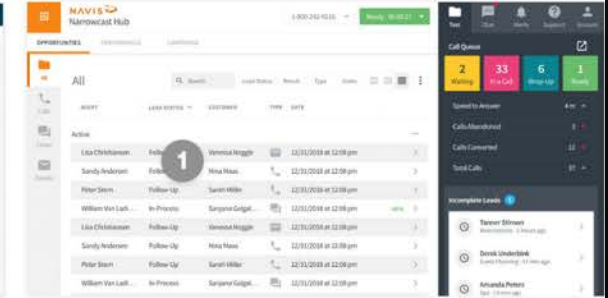
#### Content

- 1 Enterprise dashboards are usually more information dense as users need to manage simultaneous tasks/workflows/data sets. In this case, exposing more information at once is beneficial for experienced users because they don't have to dig for advanced details.
- 2 Consumer tools tend to expose only the most relevant data in an easy-to-digest, at-a-glance format. More detailed data is usually tucked away in a separate screen or modal.
- 3 In consumer tools, aesthetic appeal can be prioritized over efficiency of use. Keeping the main dashboard minimalistic, readable, and modern-looking takes priority over being able to quickly manage detailed stats and information.

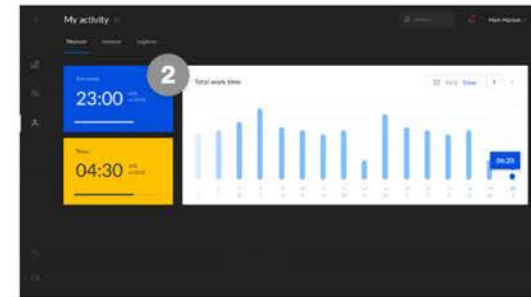
Enterprise Amazon QuickSight



Enterprise Navis



Consumer Activity logging app



Consumer eBay Seller Portal



# ENTERPRISE VS. CONSUMER DESIGN

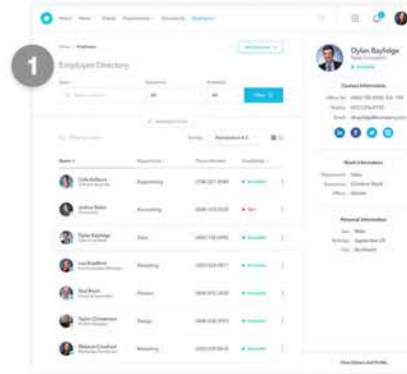
## TONE

### ENTERPRISE VS. CONSUMER DESIGN

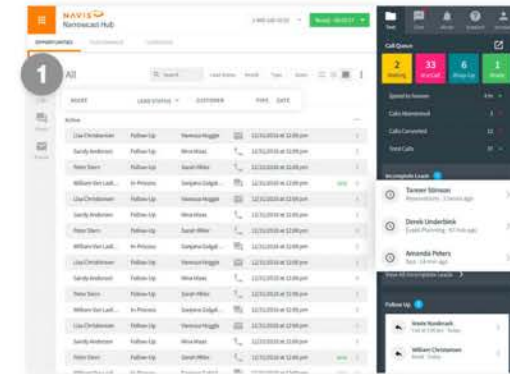
#### Tone

- 1 In enterprise tools, the tone is simple and concise as the interface takes a backseat to functionality and productivity.
- 2 In consumer apps, a friendly, helpful, and welcoming tone has become the standard. The copywriting and page layouts are set up in such a way that user is easily siphoned through the tool's main flows.

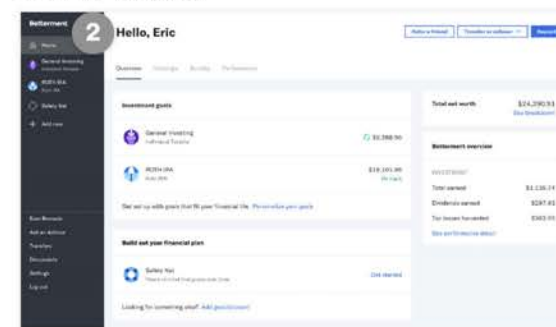
Enterprise Employee management platform



Enterprise Navis



Consumer Betterment



Consumer FA Portal



# HEURISTIC EVALUATION

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**Objectives**

01

**Better understand the requirements of the Ignite experience.**

02

**Identify obstacles and opportunities within the Ignite experience.**

03

**Collect findings that will inform workshop activities and initial design directions.**

### Evaluation Scale

The following evaluation scale was used when reviewing the current FAST and Ignite experiences:



#### Good Experience

Tasks are easily accomplished. Terminology/labels are understandable and consistent. The application uses common UI patterns.



#### Average Experience

The application is at an industry-standard or average level. Tasks are somewhat easy to accomplish but require some user effort. Terminology/labels can be confusing and inconsistent.



#### Bad Experience

Tasks are problematic or confusing for users. Terminology/labels are difficult to understand and inconsistent. The application uses unusual UI patterns.

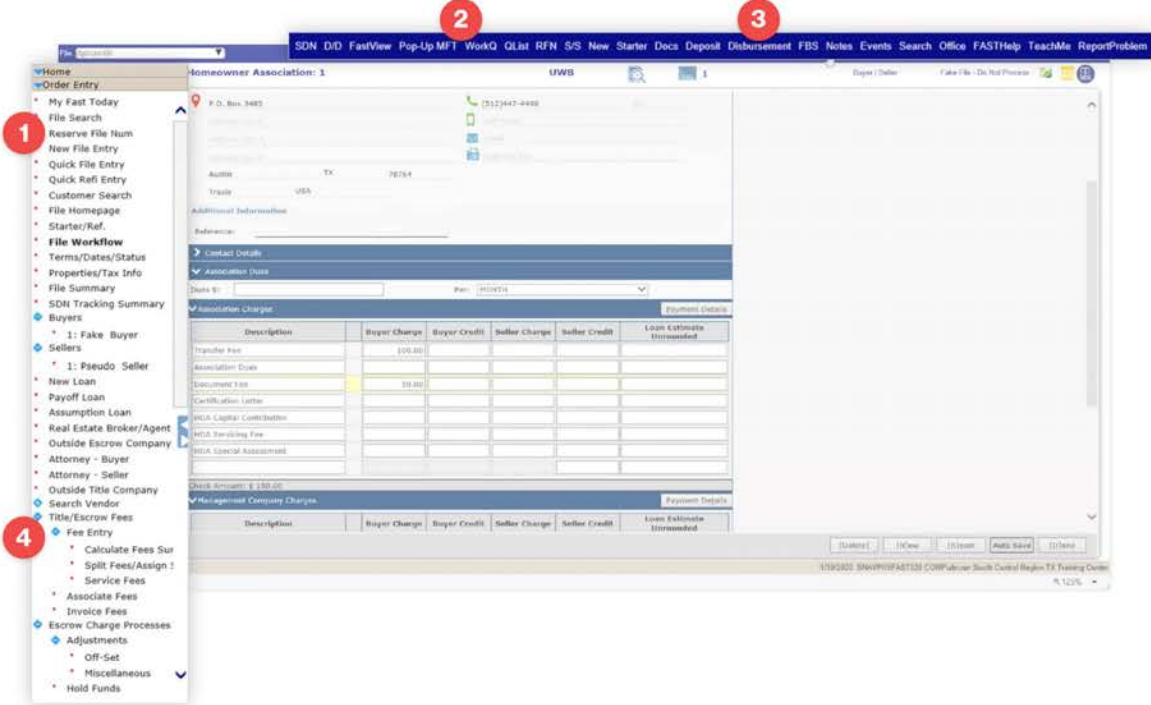
# HEURISTIC ONE

## Visibility of System Status

### HIGH-LEVEL OVERVIEW

### Visibility of System Status

- 1 There is no visible indication of progress for a given file, and it is not clear which entry forms are relevant without prior training.
- 2 The top nav contains many disorganized, competing options, making each one difficult to locate.
- 3 When the user enters charges, there is no indication that the corresponding Disbursement form has changed.
- 4 Many entries in the side nav are occluded, and there is no visible search function to locate specific entries. The user needs to either dig for the desired option or have outside documentation open.



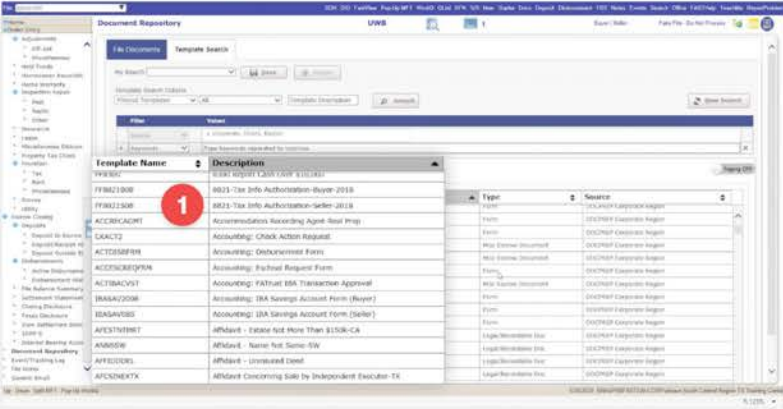
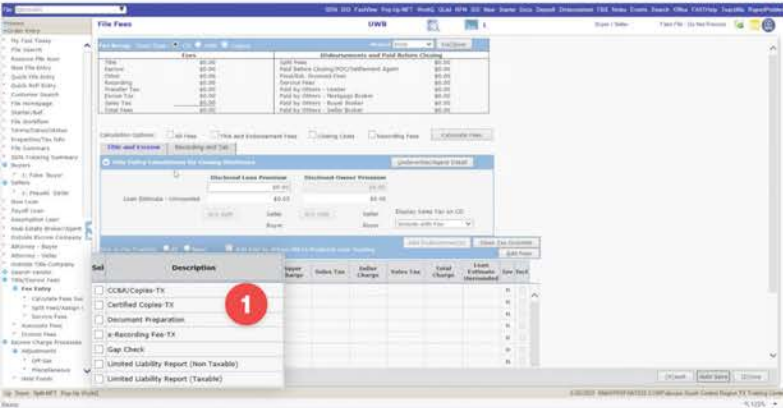
# HEURISTIC TWO

Match Between the System and the Real World

### HIGH-LEVEL OVERVIEW

## Match Between the System and the Real World

- 1 FAST often labels entry fields and templates using codes and acronyms, with little to no description. This results in a significant learning curve for users unfamiliar with the system.



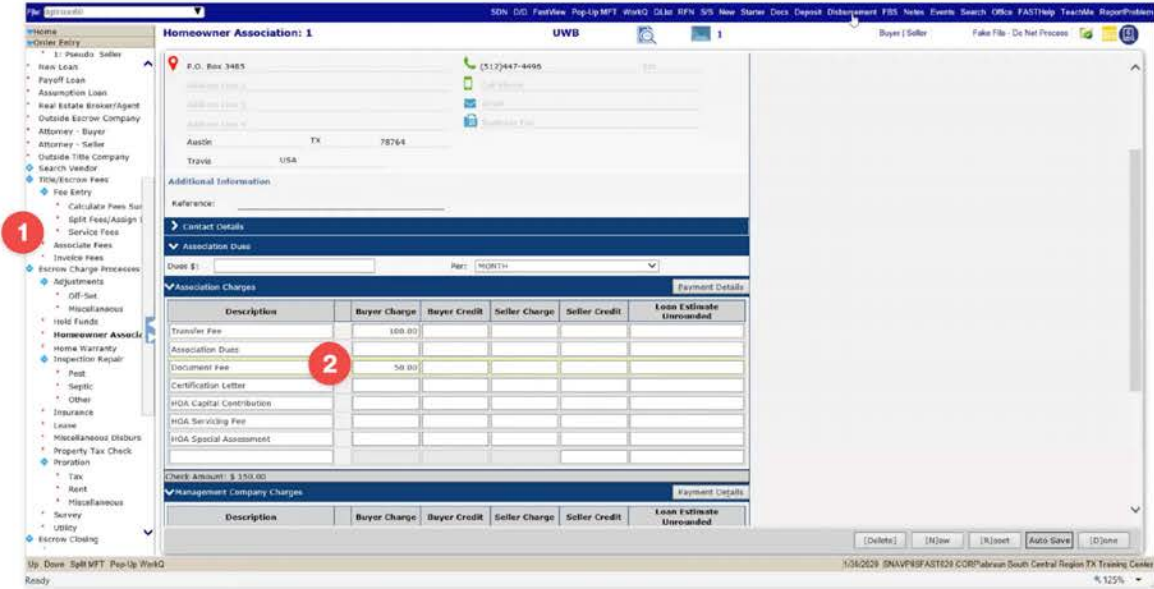
# HEURISTIC THREE

## User Control and Freedom

### HIGH-LEVEL OVERVIEW

### User Control and Freedom

- 1 The Order Entry list does not indicate which forms have been previously edited, and it is unclear whether there is a function to quickly return to previously accessed forms.
- 2 If the user fills out the wrong entry form, there is no easy way to undo or transfer the data entry.



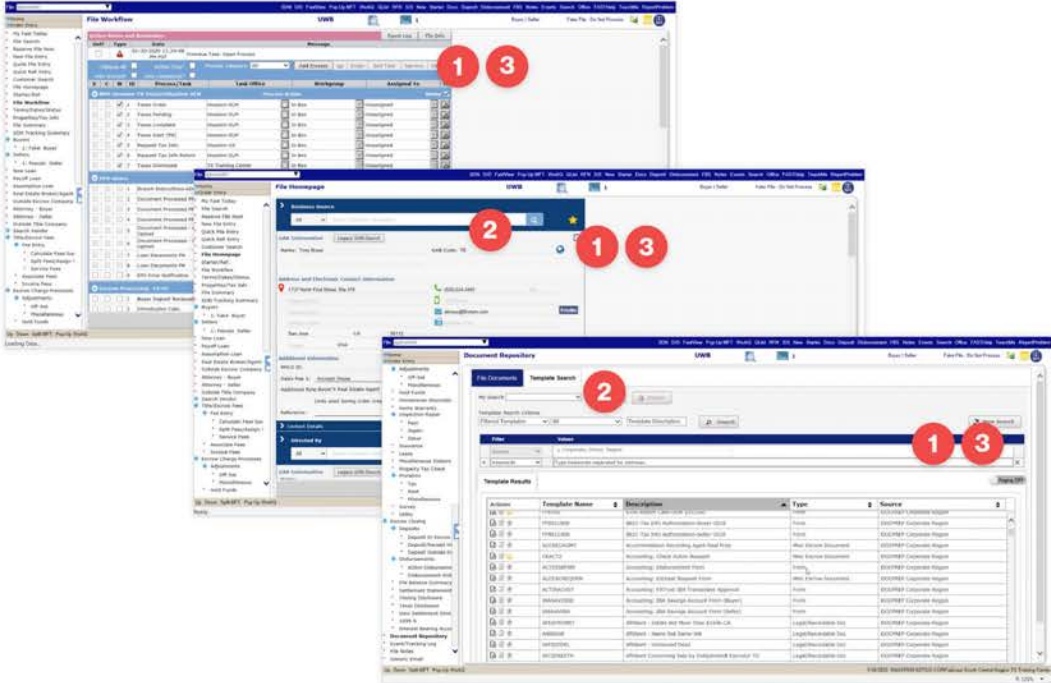
# HEURISTIC FOUR

## Consistency and Standards

### HIGH-LEVEL OVERVIEW

### Consistency and Standards

- 1 Forms do not have a consistent structure. When looking for a particular feature, the user cannot rely on page structure to quickly locate it.
- 2 The styling of the search function differs between the File Homepage and the Document Repository. This makes search more difficult to find and can result in confusion and frustration.
- 3 Visual styles such as color and iconography are applied inconsistently across different screens, resulting in a disjointed experience.



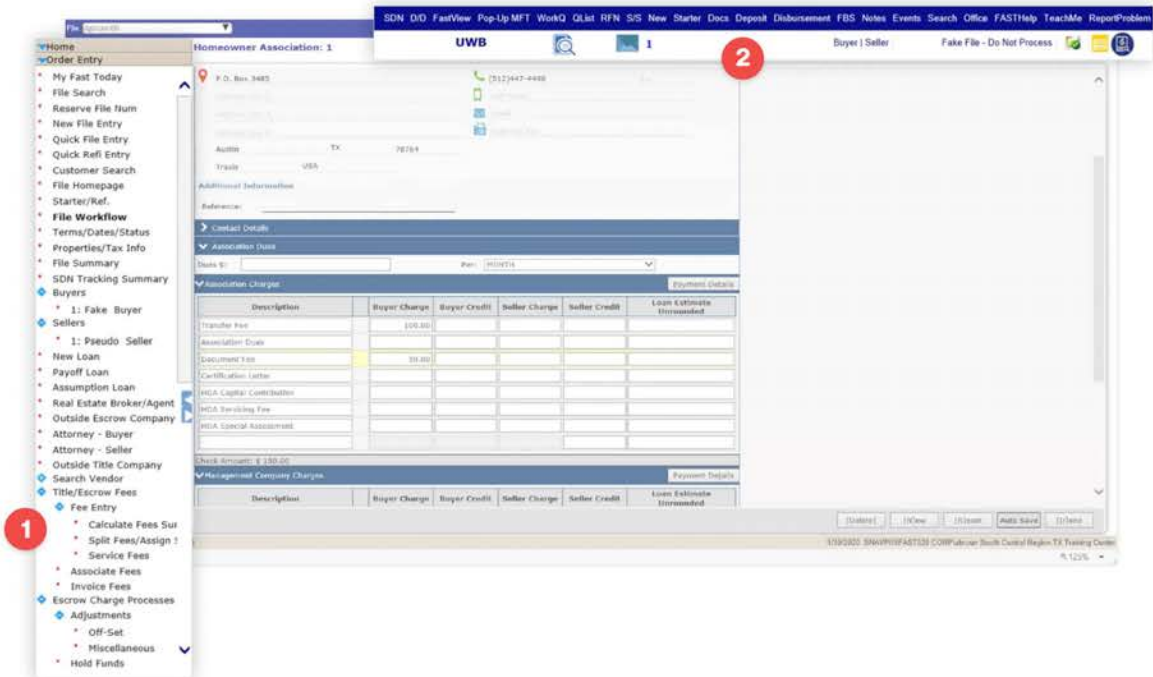
# HEURISTIC SIX

## Recognition Rather Than Recall

### HIGH-LEVEL OVERVIEW

### Recognition Rather Than Recall

- 1 The number of occluded options in the Order Entry list requires the user to recall the location of a form each time they need to access it.
- 2 The icons and labels in the top navigation are uninformative. Their functions are unclear unless the user has previously accessed them, which increases cognitive load because it forces the user to rely on recall rather than recognition.



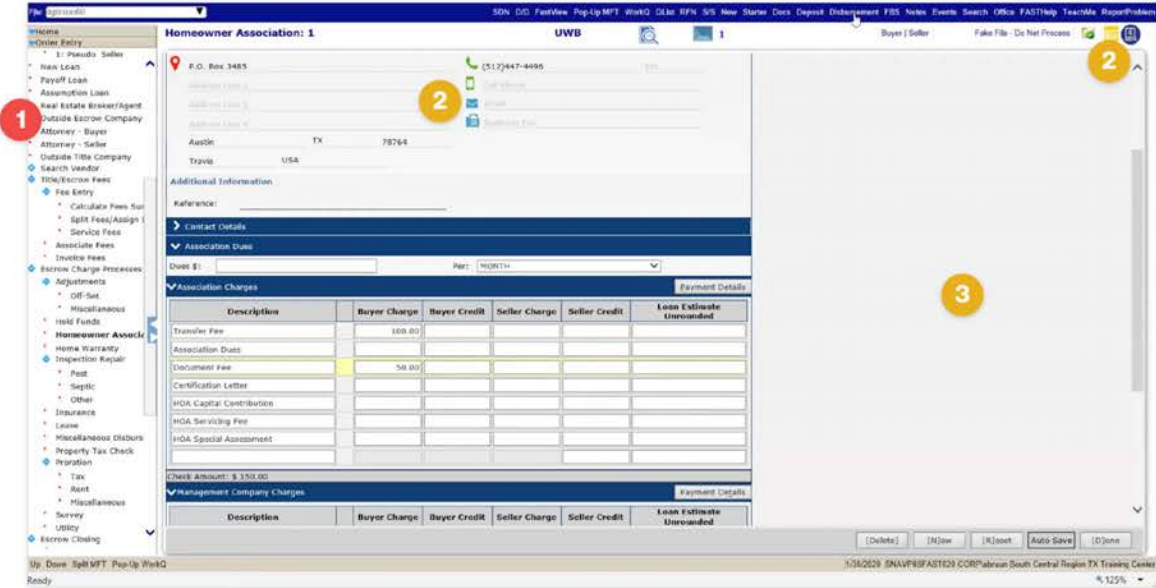
# HEURISTIC EIGHT

## Aesthetic and Minimalist Design

### HIGH-LEVEL OVERVIEW

### Aesthetic and Minimalist Design

- 1 Workflows are not tailored to specific roles. Many options are exposed to the user at once, and there is no clearly defined flow between FAST features.
- 2 The use of color in the design is not purposeful, particularly in the iconography. Arbitrary variations in color can pull attention away from the tool's more important features.
- 3 Page content is not responsive to window sizing.





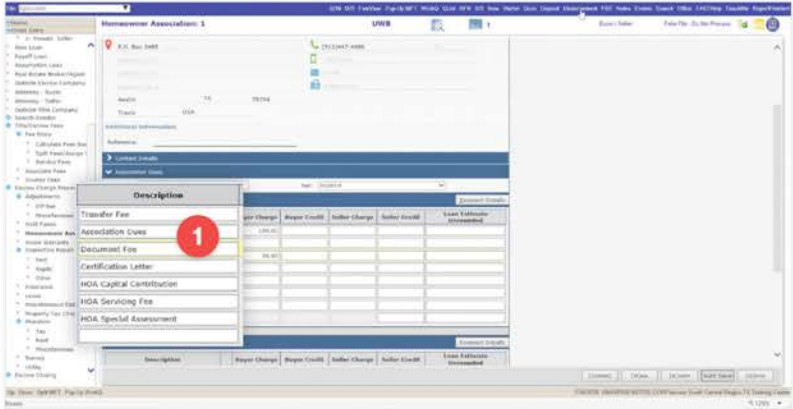
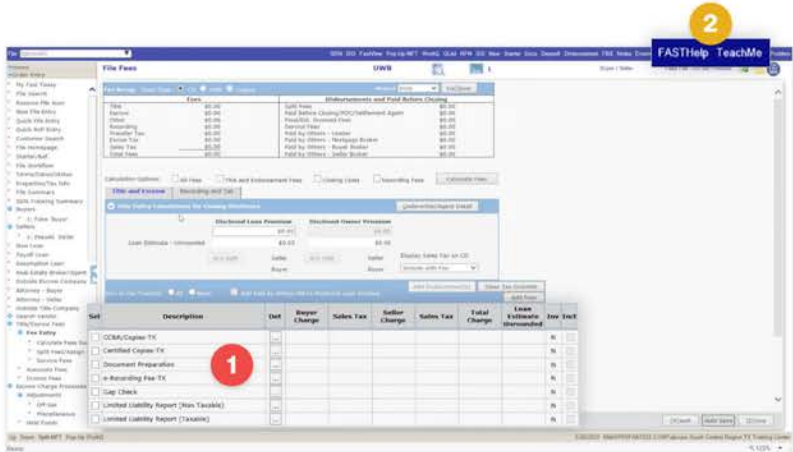
# HEURISTIC TEN

## Help and Documentation

### HIGH-LEVEL OVERVIEW

### Help and Documentation

- 1 FAST does not provide descriptions or contextual help for the fields that the user is expected to fill out.
- 2 The link to access FASTHelp is difficult to locate among the other top-nav options, and the distinction between FASTHelp and TeachMe is unclear without prior knowledge.



### Key Takeaways

#### **Dashboard doesn't present information effectively**

The dashboard could benefit from more informative visuals and a clearer information hierarchy to allow users to quickly digest their workload.

#### **File checklist doesn't assist users through transactions**

Ignite is a step up from FAST in terms of being able to visualize a file but still requires a lot of system knowledge to operate efficiently. Make help and supplementary info more readily available and automate where possible.

#### **Visuals and interactions are inconsistent**

Visuals and interactions need a polish pass to meet contemporary UI standards and to create a cohesive experience.

# STAKEHOLDER INTERVIEWS

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# STAKEHOLDER INTERVIEWS

## Overview

# We conducted 10 interviews with stakeholders across the organization.

Stakeholder interviews are designed to provide Trestles with the overall business context for the consulting engagement and ensure a shared vision across the First American team. These interviews help Trestles understand business goals and user needs, and they can highlight issues that need additional consideration due to their strategic importance to the business.

Information collected during stakeholder interviews will be used to inform the project approach, research, and strategy for the Ignite engagement.

Interviews lasted 60 minutes each and took place between February 3 and February 14, 2020.

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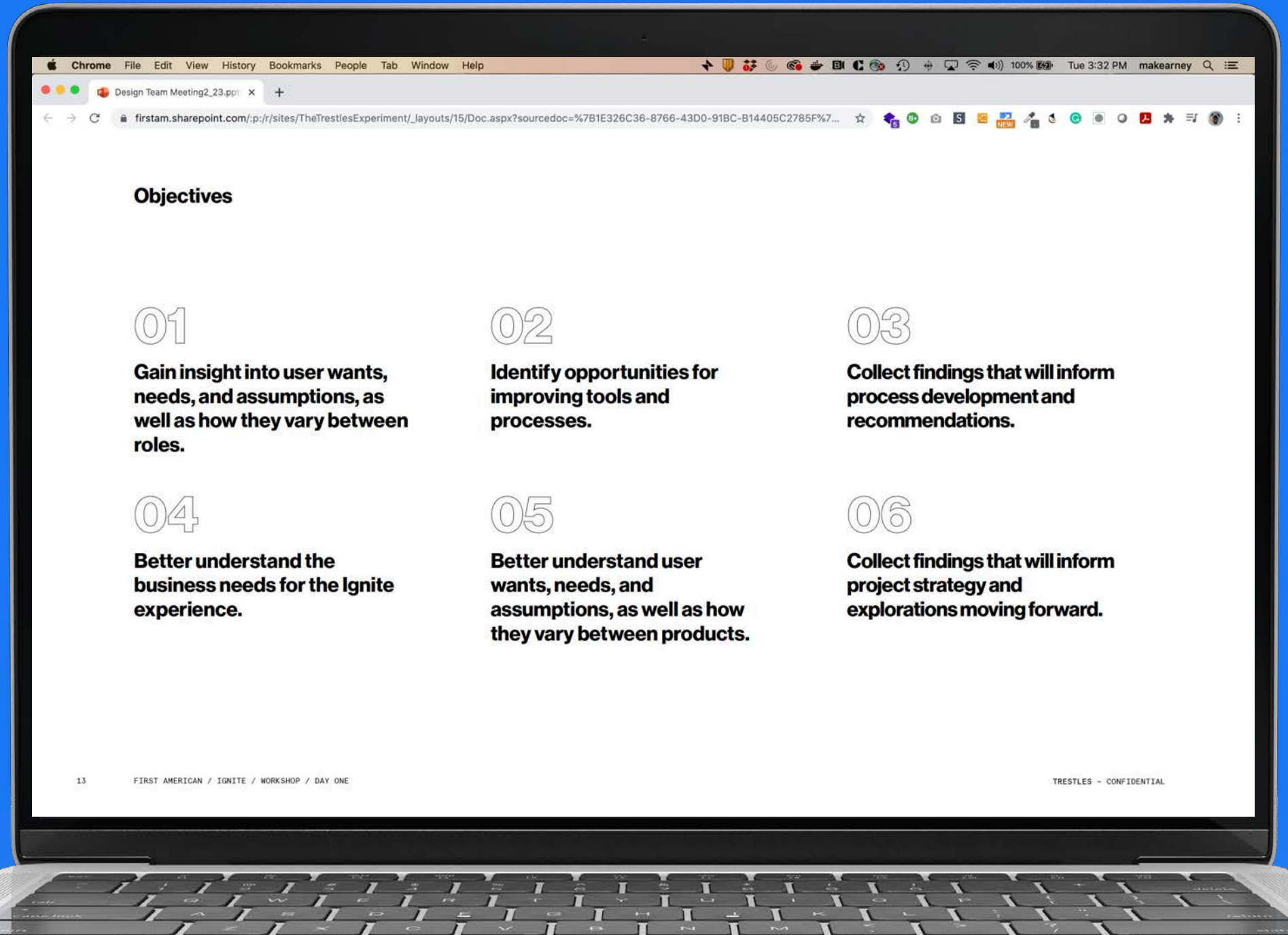
**Study Description**  
This study aims to understand what FAST Ignite customers want to see from the future product and its dashboard in order to inform the first design sprint of First American Ignite project. The goal of this study is to determine the main pain points or issues related to the current experience, as well as how they would like Ignite to be improved when a dashboard is added to the experience. The participants will also be shown their dashboard contents and secondary screens and asked to provide feedback on each screen.

**Research Questions**  
**Background Questions:**  
1. How do users currently organize their work? How do they decide what's most important to work on?  
**Dashboard:**  
1. What purposes do users want a dashboard to serve in Ignite?  
2. What level of information/details do users want to see on the dashboard?  
3. What do users want the dashboard to focus on?  
4. What actions do users expect to be able to take from the dashboard?  
5. When do they use the dashboard, and how?  
6. What kind of notifications would be useful, if any?  
**File Organization:**  
1. How do users want to be able to organize their files?  
2. Which file indicators do users currently use to identify/organize files? How do they want to identify files in the future?  
3. Which file indicators do users currently use to filter the current status of a file in the future?  
4. How do users currently identify/prioritize information do they want to work on?  
5. What sorting mechanisms/files do users want?  
6. Do users need to be able to access information from previously completed cases?  
7. How would users use to sort/organized files and tasks?  
**Concepts:**  
Notes: ... First American Ignite Sprint 1 - Session Guide - Confidential - Page 2

**Session Script and Participant**  
Note: This script is a guide. The script is meant to be general categories and types of questions. Questions will be tailored to each participant. The actual questions will not necessarily follow the script.  
Notes: ... First American Ignite Sprint 1 - Session Guide - Confidential - Page 2

Stakeholder Interview Guide

# STAKEHOLDER INTERVIEWS



## Objectives

01

**Gain insight into user wants, needs, and assumptions, as well as how they vary between roles.**

02

**Identify opportunities for improving tools and processes.**

03

**Collect findings that will inform process development and recommendations.**

04

**Better understand the business needs for the Ignite experience.**

05

**Better understand user wants, needs, and assumptions, as well as how they vary between products.**

06

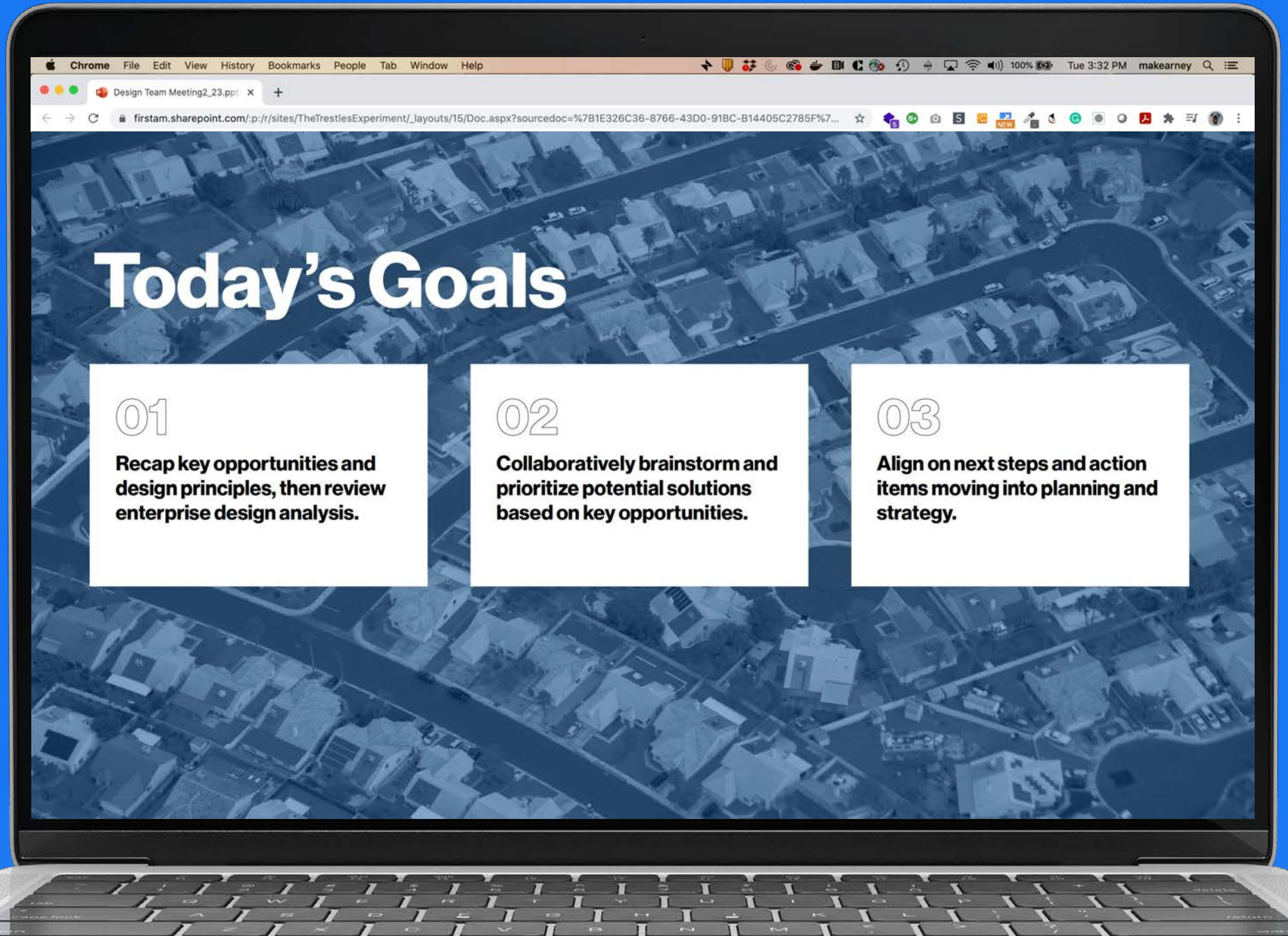
**Collect findings that will inform project strategy and explorations moving forward.**

# DESIGN THINKING WORKSHOPS

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## WORKSHOP GOALS

Due in large part to the history of being an engineering-driven organization, the stakeholders were not familiar with the process of participating in workshops to align on design exploration as it pertains to business objectives. We set out on a mission of cocreation by inviting the business to build the product with us.



# Today's Goals

01

**Recap key opportunities and design principles, then review enterprise design analysis.**

02

**Collaboratively brainstorm and prioritize potential solutions based on key opportunities.**

03

**Align on next steps and action items moving into planning and strategy.**

## FAVORITE QUOTE

Once our initial stakeholder interviews had concluded we were able to better understand the challenges the business and engineering team had faced with this product for nearly two decades. This quote refers to building atop a live product that is responsible for 80% of our revenue.

*“We are driving a car while trying to change the engine. There’s just inherent danger in that.”*

**What You Are Worried About**  
Stakeholder 3





FAST

IGNITE

DASHBOARD

CHECKLIST

MENTS

# FEATURE REFINEMENT

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# FEATURE REFINEMENT

## DASHBOARD

The dashboard features a top navigation bar with the Ignite logo, a search bar, and user information. Below the navigation is a timeframe selector with tabs for Today, This Week, Next Week, and This Month. The main content area is divided into several sections:

- Upcoming:** A section showing upcoming appointments for April 6th, including 'Bruun/Yuzer' and 'Huang/Kim'.
- Files Closing:** A table with 13 entries, showing file numbers, statuses (Overdue, At Risk, On Track), property addresses, seller/buyer names, outstanding tasks, and close dates.
- Overview:** A summary section showing 74 changes since yesterday and key metrics: 1 Overdue File, 52 Open Files, 15 New Files, and 6 Files Closing This Week.
- Saved Files:** A section showing 20 saved files in 3 folders.
- Waiting on Commitment:** 12 files.
- Waiting on Lender Docs:** 5 files.
- Docs for Recording:** 3 files.
- Shortcuts:** A grid of buttons for 'Recently Viewed', 'All Closed Files', 'Top Customers', and '1099-S Exceptions'.

A callout box points to the 'Today' tab in the timeframe selector, stating: "Timeframe tabs were kept due to their popularity with users; specifically related to how this feature allows them to gauge workload over time."

File Number	File Status	Property Address	Seller/Buyer	Outstanding Tasks	Close Date
2406737	Overdue	4235 Main St, Unit A	Branch/Shimada	2 Disbursement, Policy	4/12/2020
2293044	Overdue	8497 Simonds Ct, Apt 6	Plata/Lee	6 Loan Documents, Records, +	4/12/2020
2339940	At Risk	756 NW 24th St, Apt 120	Ontari/Reshamvala	8 Closing Documents, Record, +	4/14/2020
3992018	At Risk	5498 Hemlock Terrace	Maas/Knapp	9 Curative, Loan Documents, +	4/14/2020
3449320	At Risk	311 Teri Ct	Crabtree/Noggle	12 Record, Disbursement, +	4/14/2020
4439201	At Risk	416 Raymond Ct, Apt 2124	Pippen/Briggs	7 Loan Documents, Record, +	4/14/2020
3392102	At Risk	1865 Baker Pl	Jamacaru/Ly	4 Disbursement, Policy	4/15/2020
2129330	At Risk	7788 Eagle Rd	Clark/Nunez	2 Pre-Closing, Closing Documents	4/15/2020
2233822	On Track	525 Terrace St, Unit A	Samarel/Fatima	9 Survey: Affidavit T-47	4/17/2020
2239034	On Track	120 Park Skyline Rd	Mitchell/Baker	12 Disbursement	4/17/2020
4439202	On Track	42 Upland	Hirahara/Young	9 Buyer CD	4/18/2020
4443920	On Track	1324 Presidio Pl	Thomson/Hampshire	0 Ready for Closing	4/19/2020
3433210	On Track	730 Park Pl	Hirahara/Young	0 Ready for Closing	4/19/2020

# FEATURE REFINEMENT

## ALL FILES

The screenshot shows the Ignite application interface for the 'All Files' section. At the top, there's a search bar and navigation elements. Below that, a summary bar shows 'All Files 132', 'New Files 24', 'Open Files 96', and 'Closed Files 1000+'. The main area features a table with columns for File Number, Property Address, Seller/Buyer, Phase, and more. A callout box points to the 'Business Source' filter in the top navigation, stating: 'Business Source was added as a filter in All Files (it was the only filter identified as missing during round two)'. On the right, there are sections for 'Saved Views' and 'Saved Files'.

File Number	Property Address	Seller/Buyer	Phase	Close Date	Business Source	Last Action
2406737	4235 Main St, Unit A	Branch/Shimada	Opening	4/20/2020	All Sources	4/20/2020 at 11:00 AM
2356032	8497 Simonds Ct, Apt 6	Plata/Lee	Opening	4/20/2020	All Sources	4/20/2020 at 11:00 AM
2406243	756 NW 24th St, Apt 120	Ontari/Reshamvala	Opening	4/20/2020	All Sources	4/20/2020 at 11:00 AM
2176337	5498 Hemlock Terrace	Maas/Knapp	Disbursement	4/13/2020	All Sources	Yesterday at 11:00 AM
2406700	311 Teri Ct	Crabtree/Noggle	Disbursement	4/20/2020	All Sources	4/3/2020 at 2:20 PM
2405932	416 Raymond Ct, Apt 2124	Pippen/Briggs	Disbursement	4/24/2020	All Sources	4/2/2020 at 11:00 AM
2489102	1865 Baker Pl	Jamacaru/Ly	Disbursement	4/24/2020	All Sources	4/1/2020 at 9:23 AM
2483028	7788 Eagle Rd	Clark/Nunez	Pre-Closing	4/23/2020	All Sources	4/1/2020 at 10:00 AM
2459489	525 Terrace St, Unit A	Samarel/Fatima	Pre-Closing	4/23/2020	All Sources	4/2/2020 at 8:50 AM
2348392	120 Park Skyline Rd	Mitchell/Baker	Pre-Closing	4/20/2020	All Sources	4/2/2020 at 11:00 AM
2939108	42 Upland	Hirahara/Young	Pre-Closing	4/20/2020	All Sources	4/4/2020 at 11:00 AM
2839402	1324 Prescidio Pl	Thomson/Hampshire	Closing	4/14/2020	All Sources	4/5/2020 at 11:00 AM
2488390	730 Park Pl	Hirahara/Young	Closing	4/14/2020	All Sources	4/5/2020 at 11:00 AM
2454830	416 Raymond Ct, Apt 2124	Pippen/Briggs	Disbursement	4/20/2020	All Sources	4/5/2020 at 11:00 AM
2444439	1865 Baker Pl	Jamacaru/Ly	Disbursement	4/19/2020	All Sources	4/5/2020 at 11:00 AM
2432802	7788 Eagle Rd	Clark/Nunez	Pre-Closing	4/19/2020	All Sources	4/5/2020 at 11:00 AM
2934802	525 Terrace St, Unit A	Samarel/Fatima	Pre-Closing	4/20/2020	All Sources	4/5/2020 at 11:00 AM
2384893	120 Park Skyline Rd	Mitchell/Baker	Pre-Closing	4/20/2020	All Sources	4/5/2020 at 11:00 AM

# FEATURE REFINEMENT

## APPOINTMENTS

The screenshot displays the Ignite software interface for managing appointments. At the top, there is a navigation bar with the Ignite logo, a dropdown menu for 'Appointments', a search bar for file numbers and addresses, and a 'My Files' dropdown. Below this, a secondary navigation bar shows filters for 'Today' (5), 'This Week' (9), 'Next Week' (17), and 'This Month' (36).

The main interface is divided into three sections:

- Left Sidebar:** Contains navigation icons for 'Action Items', 'All Files', 'Appointments', 'Reports', and 'Help Center'.
- Filter Panel (Left):** A pink-bordered box highlights the filter options:
  - Transaction Type:** A dropdown menu set to 'All Types'.
  - Business Source:** A dropdown menu set to 'All Sources'.
  - Calendars:** A list of four calendars with checkboxes: 'Calendar 1' (checked), 'Calendar 2' (checked), 'Calendar 3' (unchecked), and 'Calendar 4' (checked).
- Calendar View (Center):** A calendar for April 6, 2020, showing a grid of time slots from 9:00 AM to 12:30 PM. A callout box points to the filter panel with the text: "Added additional functionality to allow users to filter by relevant parameters and work across multiple calendars." The calendar shows several appointments:
  - 9:00 AM - 9:30 AM:** Santiago/Reshamvala | #2239401, 5730 E 8th Ave, Irvine, CA 92603.
  - 11:00 AM - 11:30 AM:** Bruun/Yuzer | #2239401, 8500 Von Karman Ave. #600, Irvine, CA 92603.
  - 11:00 AM - 11:30 AM:** Huang/Kim | #2239401, 1011 Western Ave, Ste 200, Irvine, CA 92603.
- Right Panel:** A calendar overview for April 2020 with the 6th highlighted. Below it is a list of appointment details for the selected date, including names, phone numbers, and addresses.

# FEATURE REFINEMENT

## FILE/TASK VIEW

**Ignite** | This file | Search for file numbers, addresses... | Carla

**Branch/Shimada**  
4235 Main St, Unit A | File Number: 4423678 | Agents: Smith/McKissack | Close Date: 4/31/20 (27 days)

**Tasks** | Appointments

Filter by Status: All statuses | Task +

- Earnest Money Deposit (Overdue, Due 4/31/2020)
- OTC Commitment Ordered (Completed, Due 4/31/2020)
- Follow Up with OTC (Completed, Due 4/31/2020)
- Payoff (Bank of America)** (Overdue, Due 4/31/2020)
- Payoff (Wells Fargo) (In Progress, Due 4/31/2020)
- Commitment Sent to Buyer, Seller, and Agents (Not Started, Due 4/31/2020)
- Tax Certificate Sent to Buyer, Seller, and Agents (Not Started, Due 4/31/2020)
- Update Tax Certificate

**Payoff (Bank of America)**  
Last updated: 3/2/2020 at 12:01 PM | 5 days overdue | Status: Overdue | Due Date: 4/31/2020

**Payoff Information**

Due Date	Is Heloc
4/2/2020	Yes

**Seller** | SSN/TIN | Actions

Seller	SSN/TIN	Actions
John Appleseed	132 55 8924	[Edit] [Delete]
Greg Smithsonian	123 46 7890	[Edit] [Delete]

**Document Upload**

Borrower's Authorization

Upload from device or drag files here

**Task Notes**

Joline Riviera | 15m

**Disbursement** | This file has been active for 29 days.

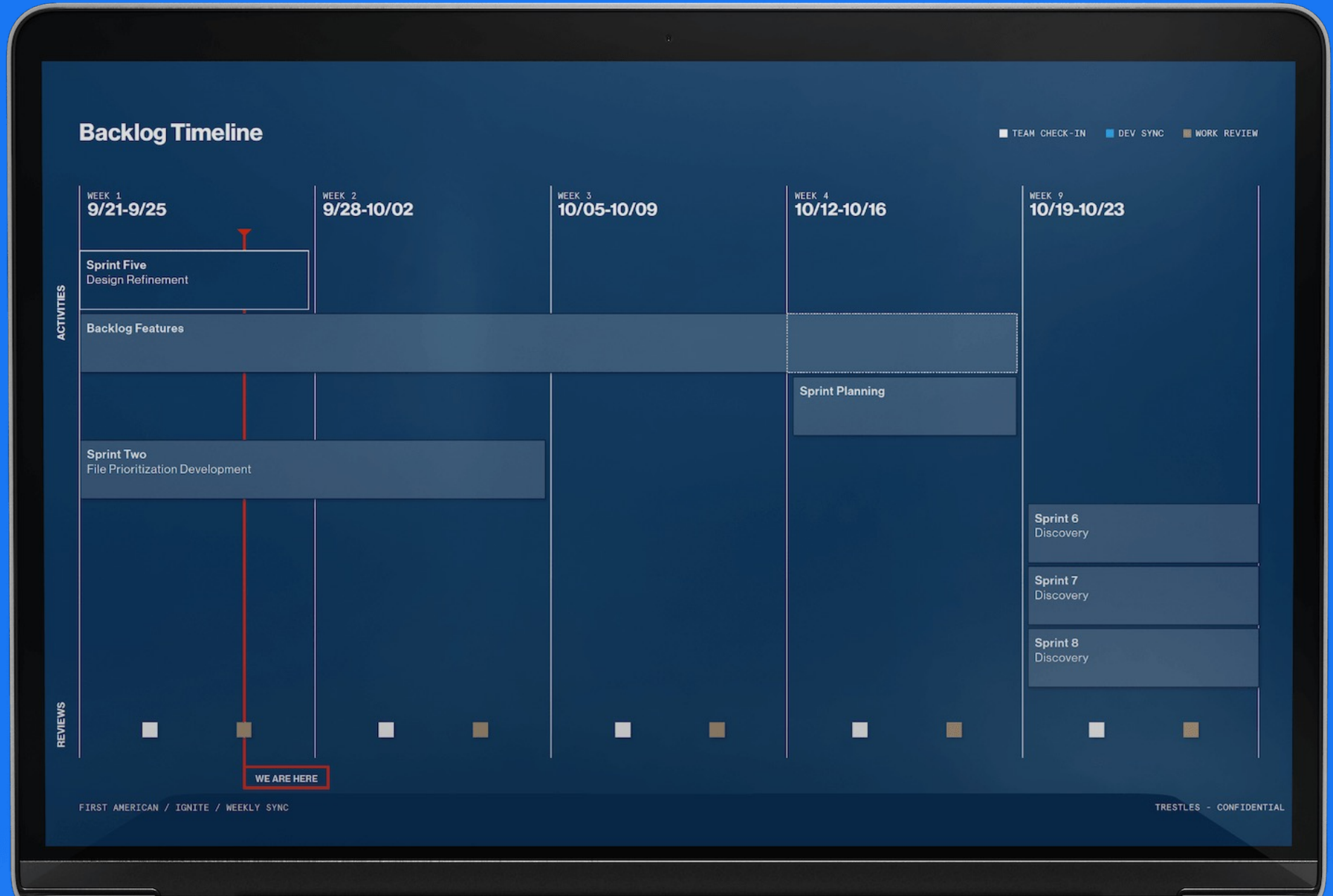
**Transaction** | Parties

**General Info**

Full Address	4235 Main St, Unit A Irvine, CA 92332
Escrow Officer	Jenny Day
Escrow Assistants	Michael Moore John Crohn
Business Segment	Residential
Transaction Type	Sale with Mortgage
Open Date	January 21, 2020
Est. Settlement Date	March 30, 2020
Settlement Date	TBD
Sale Price	\$400,000
First New Loan	\$200,000
Second New Loan	\$100,000
Business Programs	XYZ Program
Short Legal	Lot: XXXX, Track: XXXX, Unit: XXXX

# FEATURE REFINEMENT

## BACKLOG TIMELINE



**Next Steps**

**Sprint 2 - In Development**

**Sprint 5 - Approvals (9/24)**

**Sprint 4 & 5 - Hand off to Dev (10/1)**

**Continue Feature Backlog Work**

**Sprint Planning**

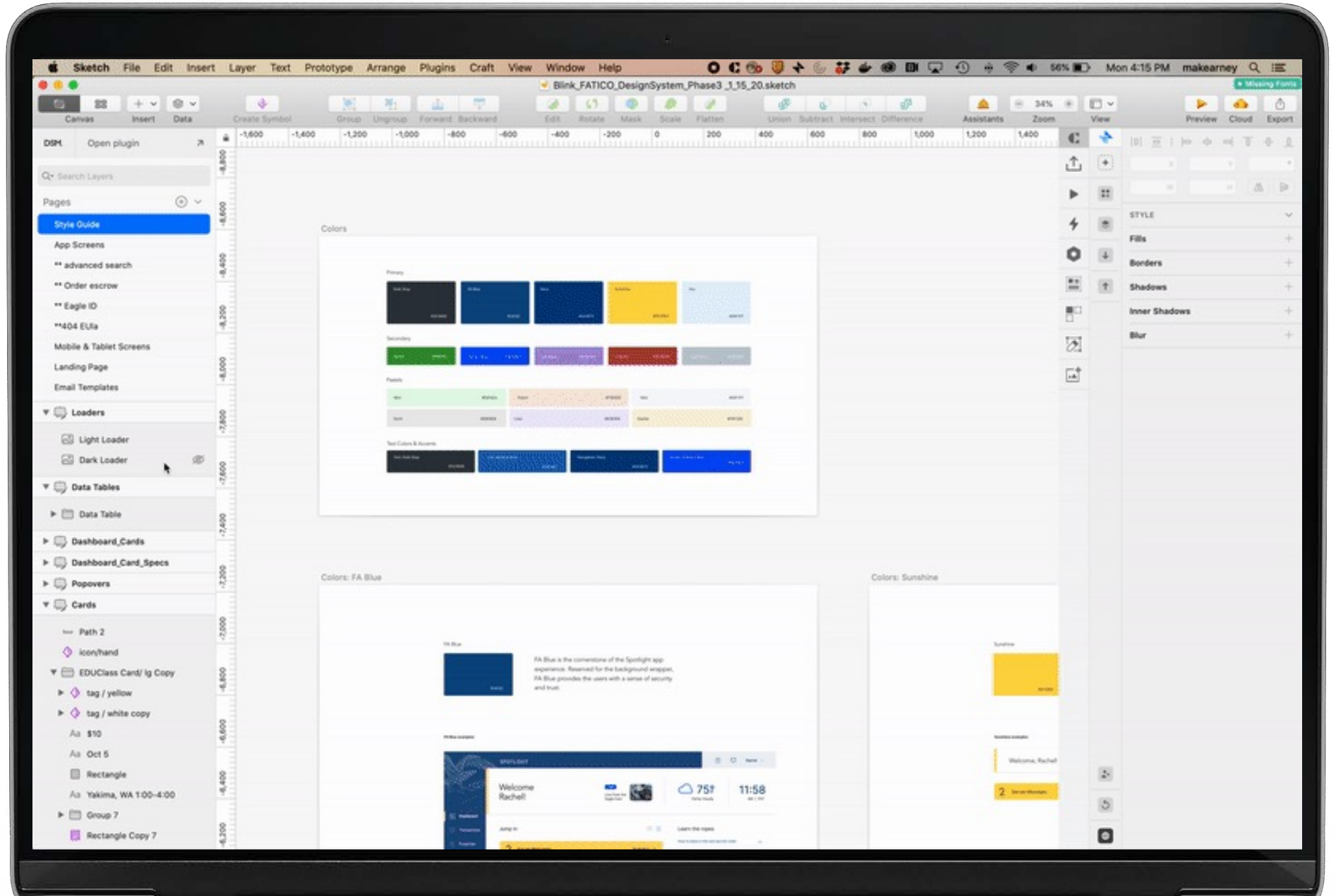


# DESIGN SYSTEMS

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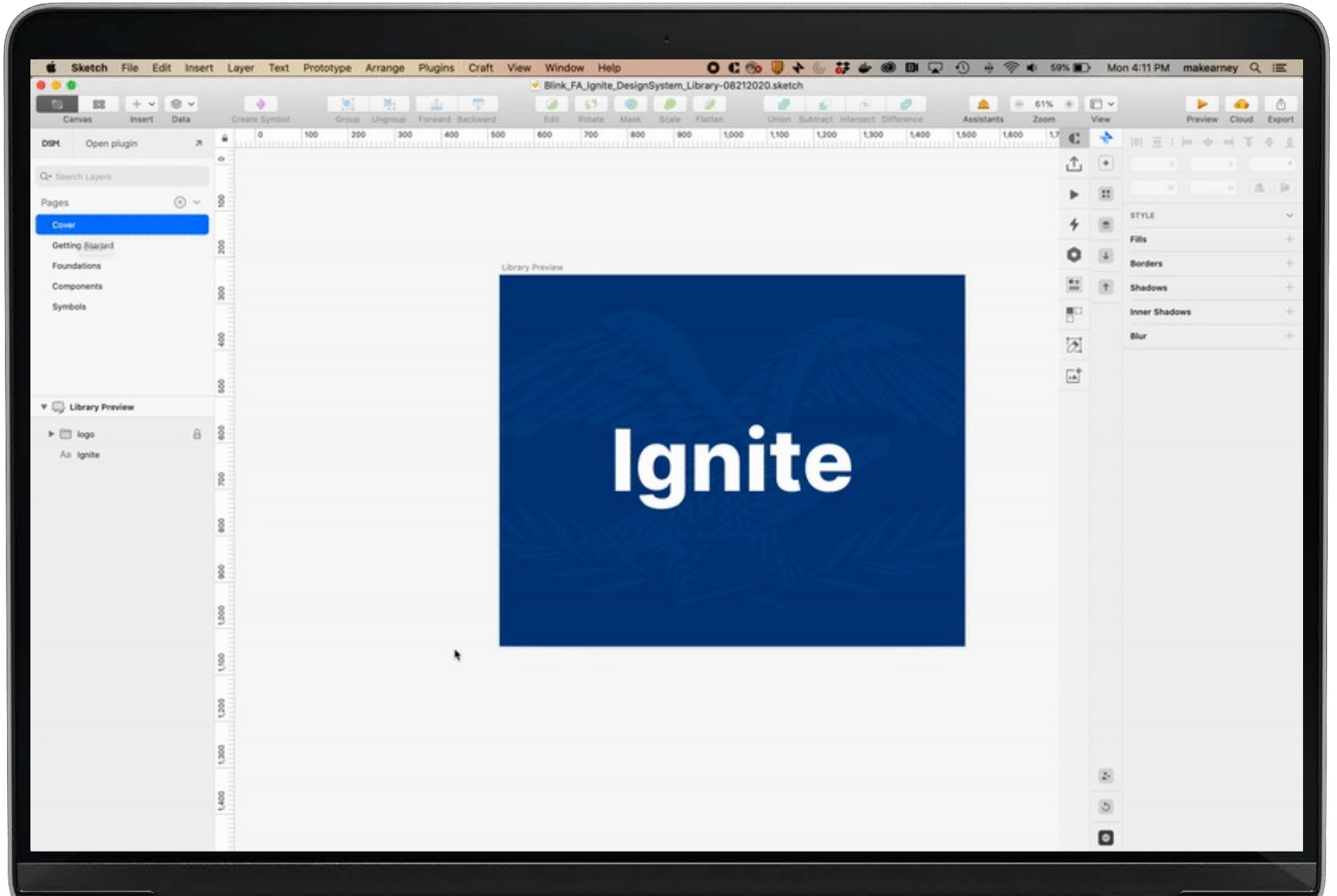


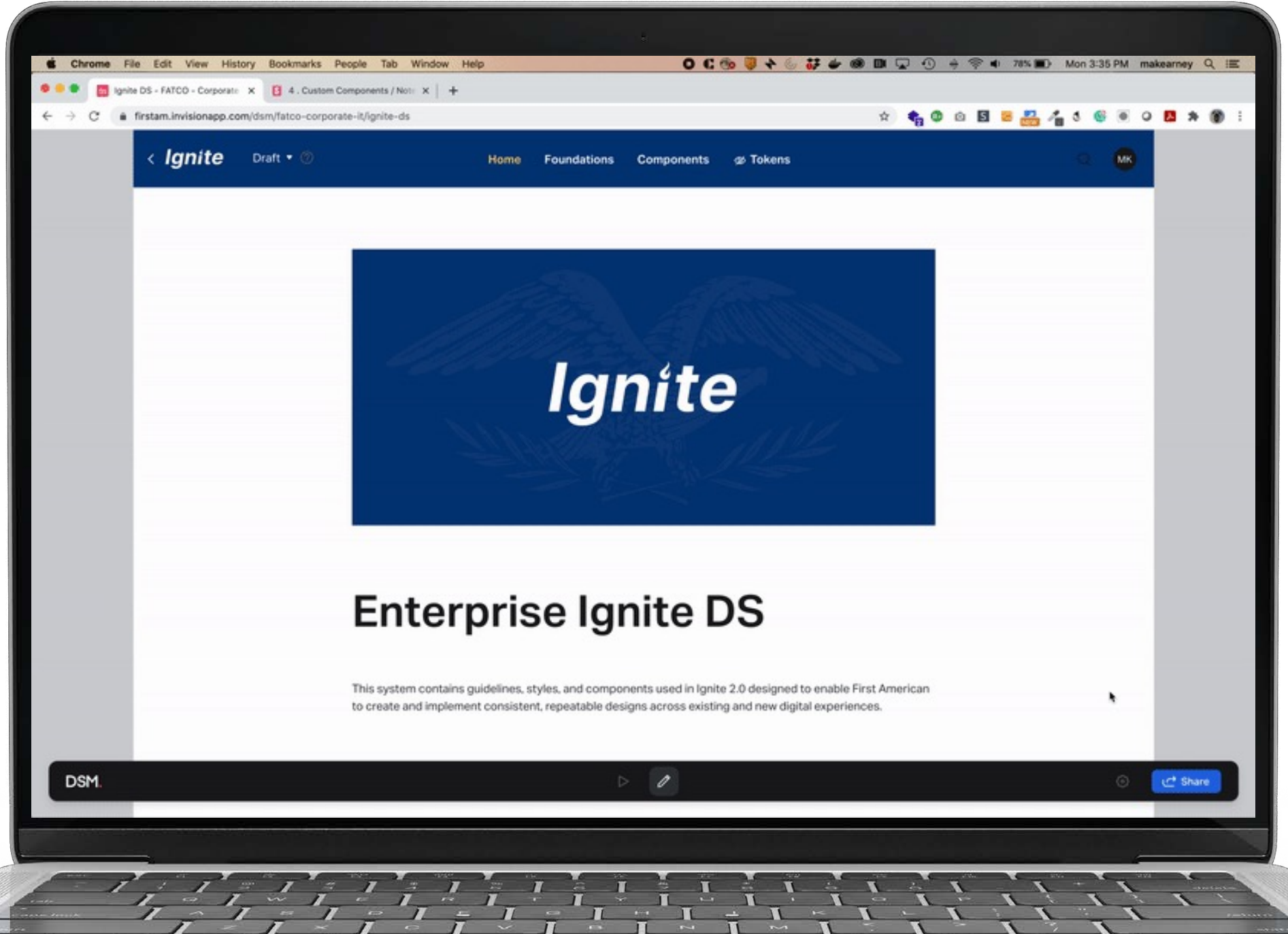
# UI DESIGN

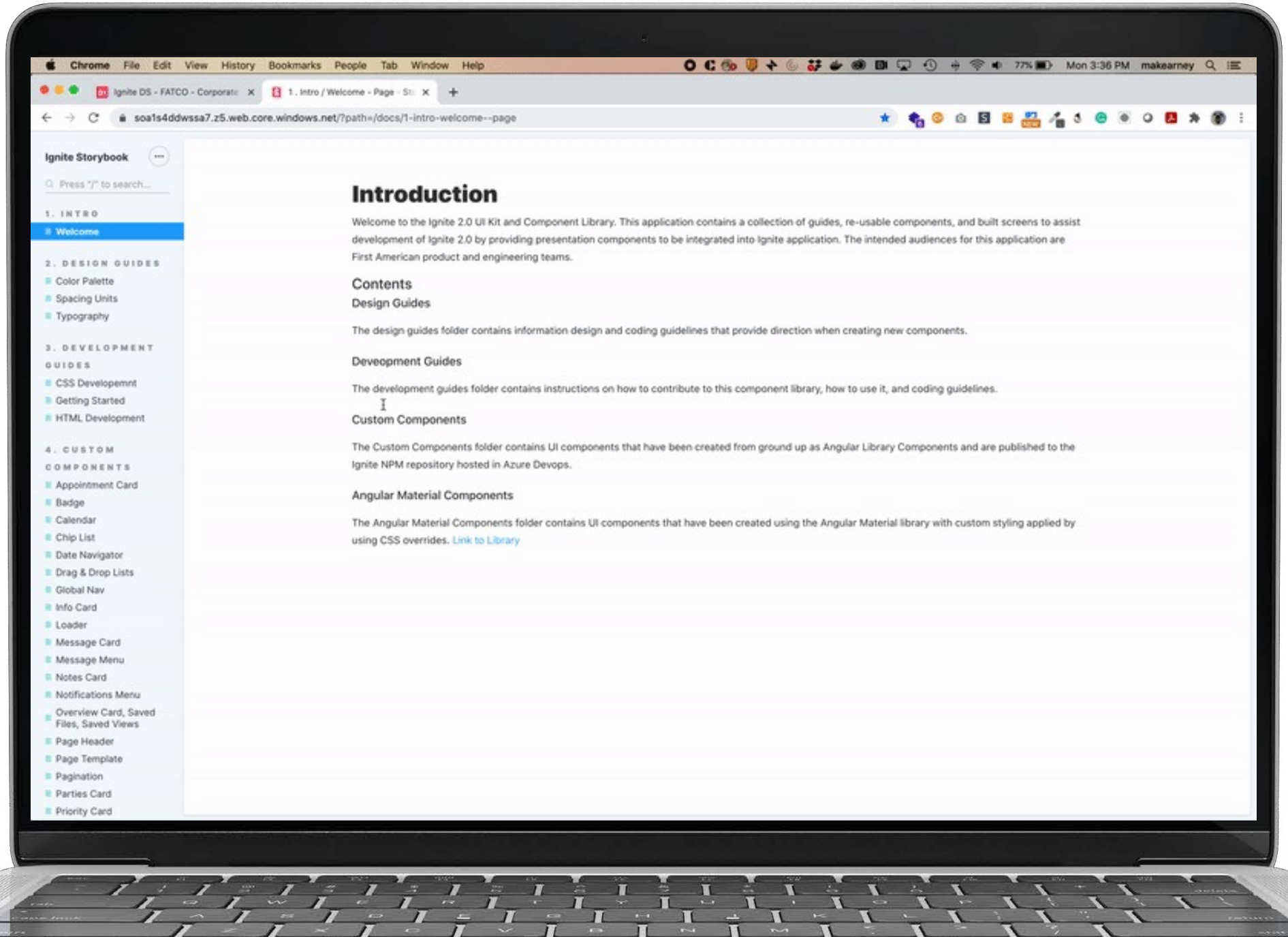




LIBRARY







QUALITATIVE



QUANTITATIVE



DESIGN, PROTOTYPING, AND DESIGN SYSTEM

