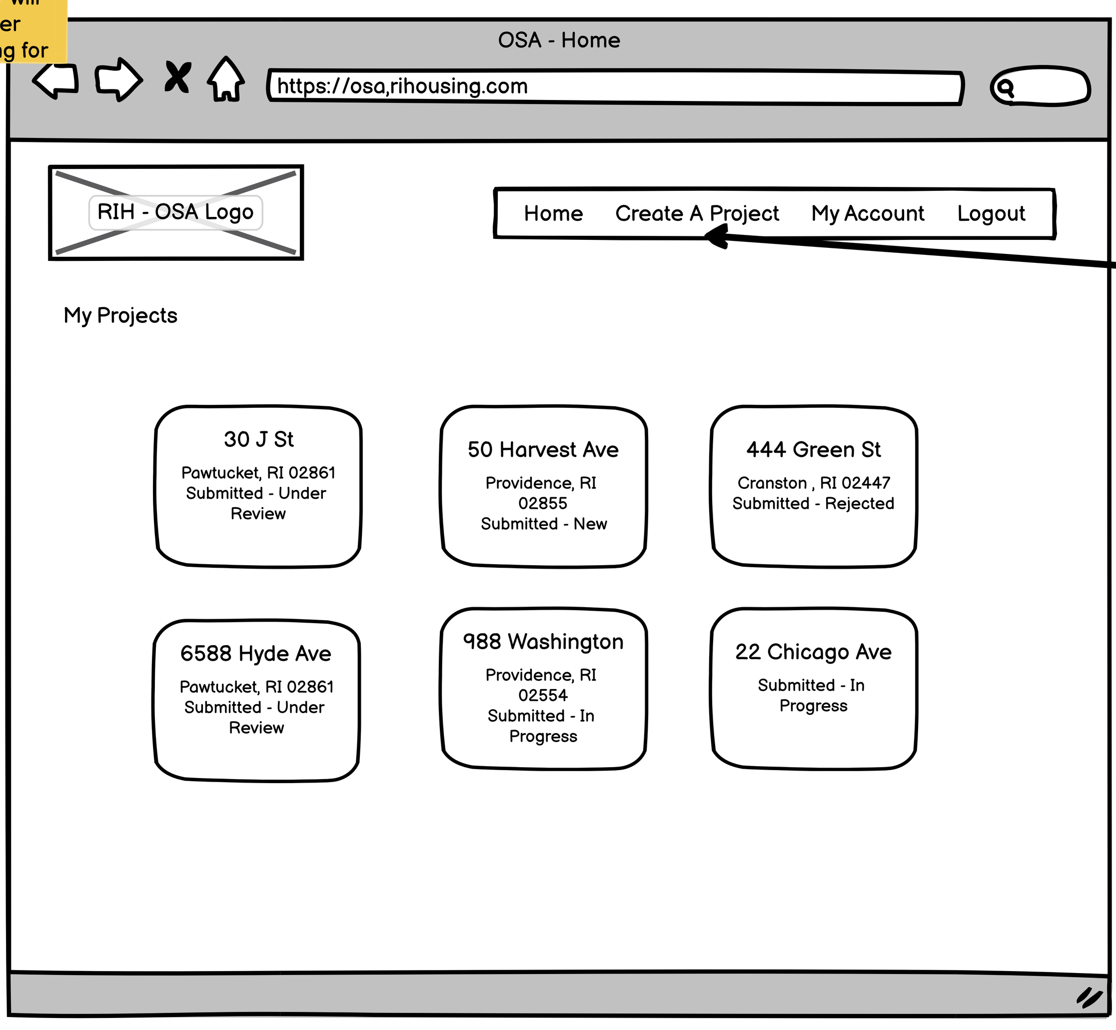
Customer Portal

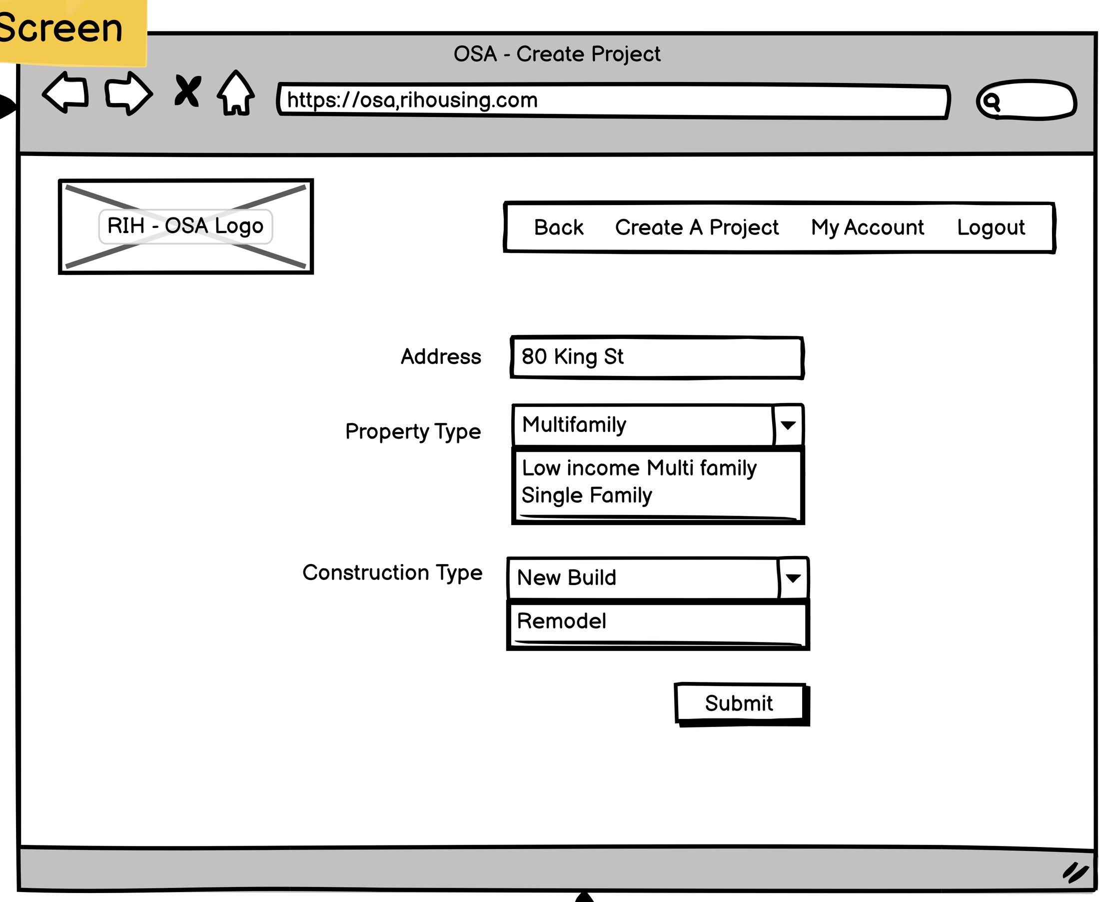
The Customer Portal is the web page RIH customers would visit to register and apply for funding for their projects.

Home Page
This is the page the customer will see after registering for



Clicking on a "Project Tile" will take the customer to the "View Project" screen for that project.

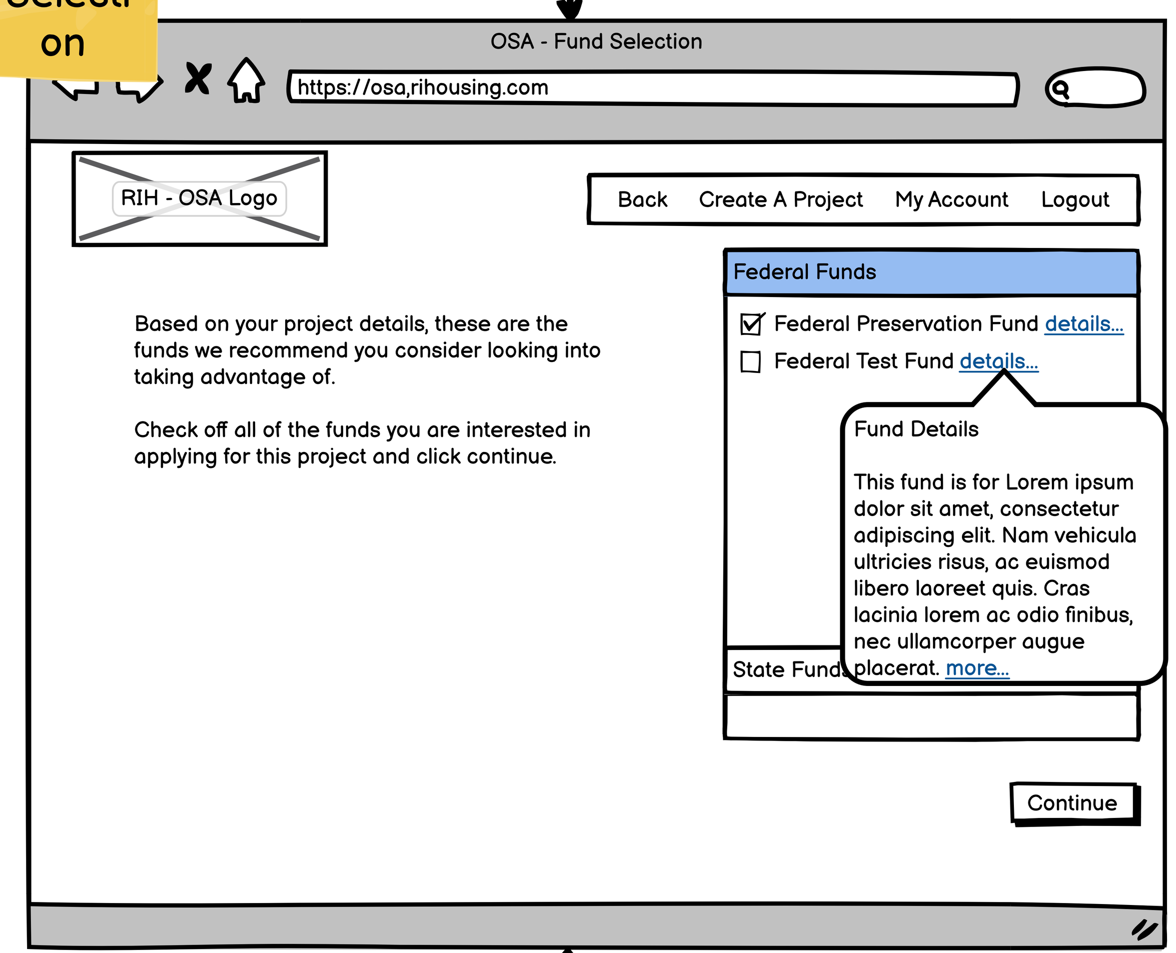
Create Project Screen



Fields like "Property Type" and "Construction Type" would narrow the list of funds that are available for this project. Ex. Funds that relate only to single family homes would not be shown in Fund Selection for a Multi-Family Project

- A Project may have multiple addresses.

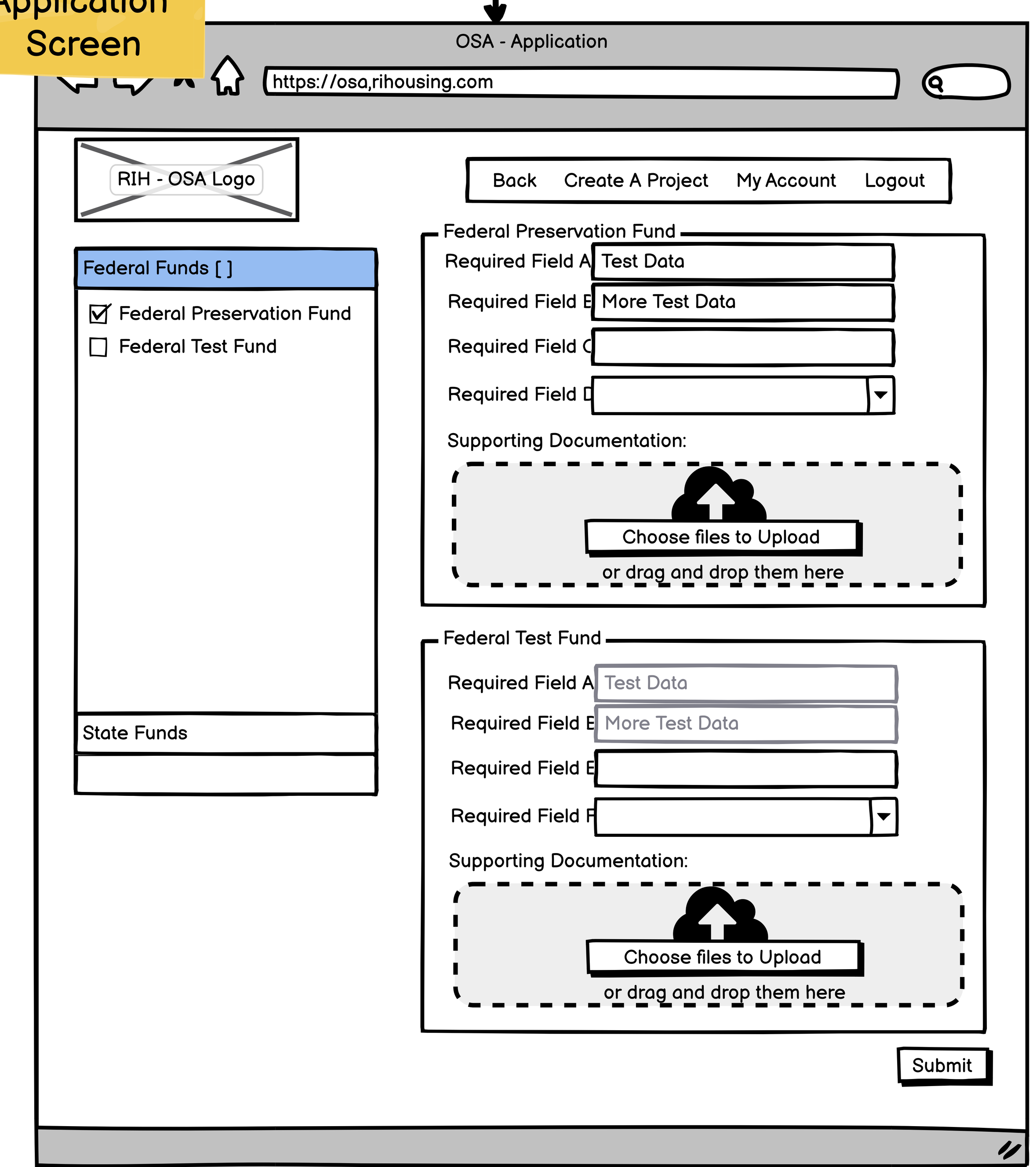
Fund Selection



The user will check off all of the funds they wish to apply for.
If they are unsure of what the fund is about, they can click the details button to get a popover with a general description of the fund. For even more details, they can click the "more" link to pop up a new window with the complete details on the fund.

After selecting all of the funds they would like to apply for, the user would click "Continue"

Fund Application Screen



Each fund that was selected has its own set of required forms and documentation.

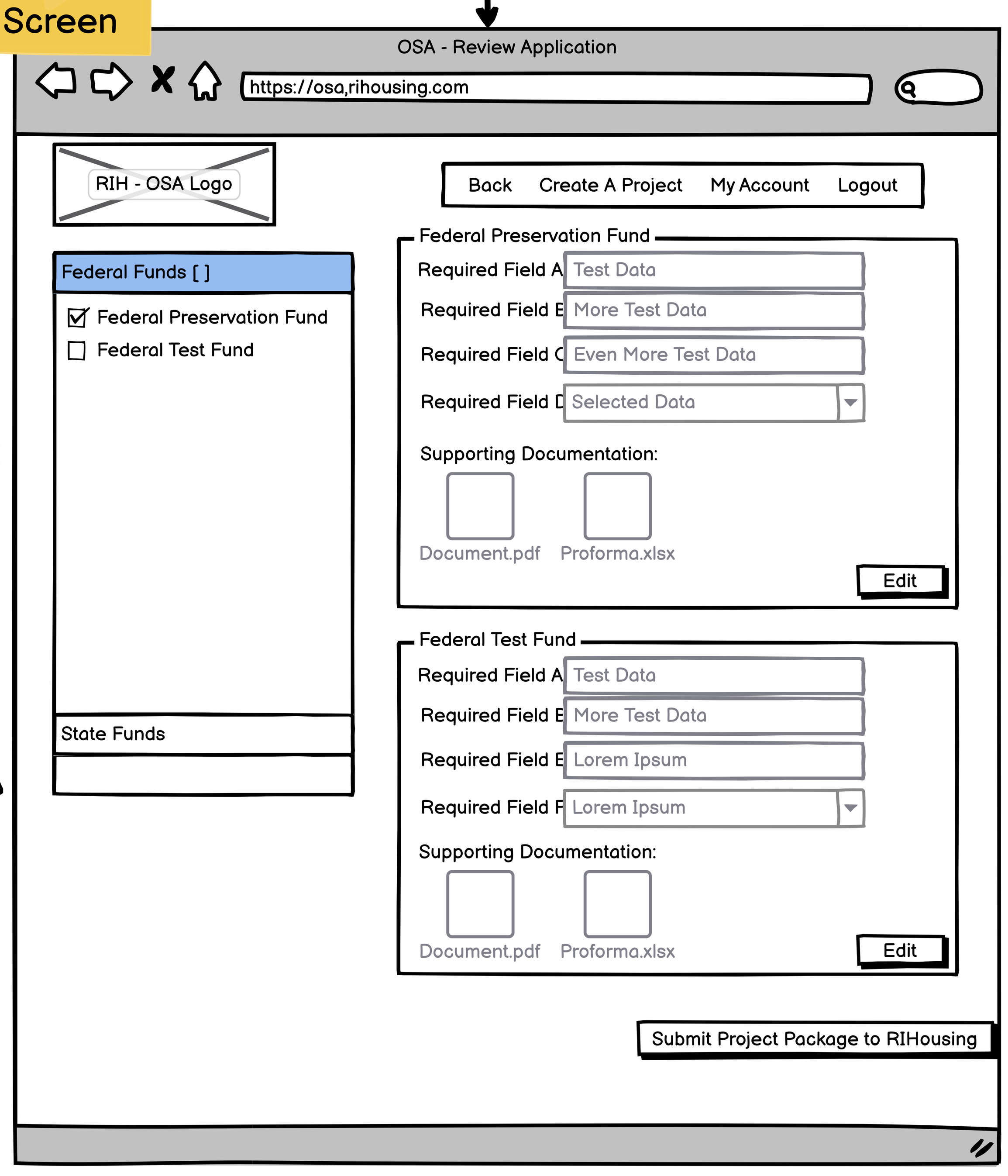
On this page, the customer fills out all of the required details, and uploads any supporting documentation for all of the funds they selected. In this example, two funds were selected.

- Federal Preservation Fund
- Federal Test Fund

Because both funds have a Required Field A and Required Field B, the customer only needs to fill this information in one time.

When the customer scrolls down to begin filling in the Federal Test Fund form, the values of Required Field A and Required Field B that were entered previously will show here as read only.

Project Review/Submit Screen



Checking off aditional funds will add them to the right side, allowing the customer to then apply for that fund in addition.

Each fund has its own set of required forms and documentation.

On this screen, the customer can review all of the information they've entered before submitting their final project package to RIHousing.

All information on this screen is read only. To edit information entered for a given fund, the customer clicks the edit button.

Once the customer has filled out all of the required details, they can click the "Submit Project Package to RIHousing" button. This generates the indexed PDF Package that then gets sent to the appropriate people within rihousing for review.

Content/Fund Mgmt Portal

The Content Manager portal is where a RIH representative goes to manage the funds that are available in the system for customers.

Content Manager Create Fund Portal - start menu
https://OSA/RIHousing.com
Create Fund
To create a new fund, select the create fund button
Fund Name
Description
Applicable Projectsv
Fund A
Fund A is a describe
Lead Multifamily low income
Fund B
Fund B is a describe
Single family low income
Fund C
Fund C is a describe
multi condo complex
Edit
Edit
Edit
All existing funds are displayed in this grid. To manage the fund, click on it's "Edit" button
when the fund hits the expiration date, auto remove fund from screen but keep available somewhere for historical purposes with the status of expired or unavailable.
Content manager Create Fund Portal - Create New Fund - step 1
https://OSA/RIHousing.com
Fund Name
Valid From
/ /
Valid To
/ /
No Expiration Date
Fund Bulletin
style
Next
If there is an application window for the fund, it is set here. If there is no application window, the "No expiration date" checkbox can be checked.
When no expiration date is set, the fund has to be manually marked as inactive so it is not available as an option for customers to apply for.
Content Manager Create Form - step 2 enter Fund Form info
https://WWW.OSA.RIHousing.com
RIH Logo
Back
General Information
Edit
This section displays general fund information such as Fund Name, Start and End Date, and Fund Bulletin.
Clicking the "edit" Button allows you to change this information
Fund Form
Edit
This section displays the form for the fund.
Clicking the "edit" Button allows you to modify the form
A CM Fund Portal - Create Fields on Forms for Fund step 3
https://WWW.OSA.RIHousing.com
RIH Logo
To create a new field click the "Create Field" Button
Creae new Field
FIELDS
search
Signature
Initial
Date Signed
Name
First Name
Last Name
First Name
Last Name
Title
Company
To select a field that already exists, choose it from the list.
If a field exists in multiple funds, it will auto populate for the customer
after they enter the infromation once.
Save