

# CFPB Company Portal Upgrade – First Look at 2017 Enhancements

# CFPB Portal Updates

In early 2017, the CFPB will launch an updated Company Portal. The underlying software used to handle and manage consumer complaints is changing to provide a better user experience and tools that help make it easier and faster for you to respond to your customers.

The new system, powered by Salesforce, has a new look and feel that is intuitive and efficient. These new CFPB Company Portal enhancements will not, however, result in any process changes. Any and all historical complaint data will still be available to you.

This overview document serves only as a first glance at the updated system and is designed to highlight only key Portal updates and changes. Further information pertaining to system training, should you or other individuals within your organization require it, is available at the end of this document for your reference.

## What is Changing?

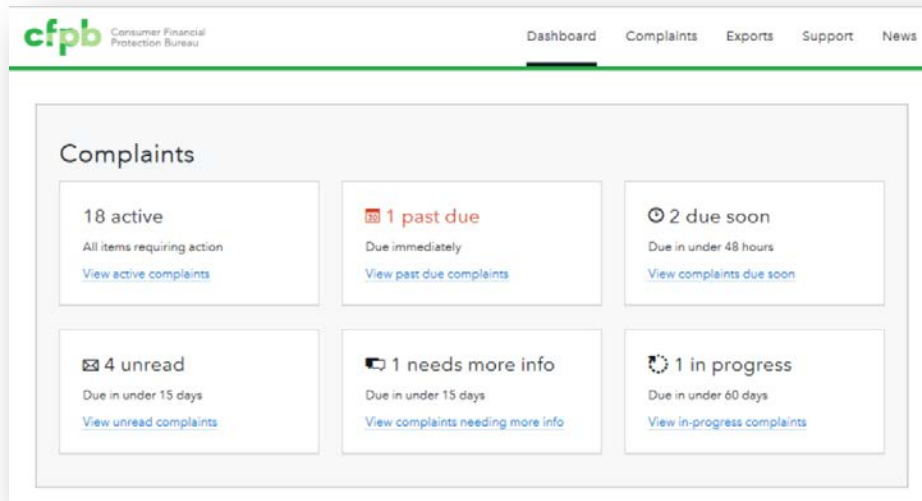
### 1 We're making it easier and faster for companies to receive and respond to complaints

- We created a **company dashboard** to provide company portal users with immediate visibility into important statuses, pending items and quick navigation to key tasks
- We **simplified company response data entry** by consolidating two company response narrative boxes into one
- We **expanded the character count of text boxes** so company users don't have to rely on attachments to share full company response narratives
- We're helping companies reduce errors by enabling users to drag and drop attachments and **preview/edit responses before submission**
- We're giving company point of contact (POCs) **more control to add, edit, and manage company portal access** and individual user permissions

### 2 We're making it easier for companies to analyze and interpret the data associated with those complaints

- We built a **better search and data export tool** so users can find and export the data they need and want
- We added timestamps on all company responses to make it easier for companies to **track and verify response timing**
- We're making it easier for companies to integrate complaint details into proprietary complaint management systems with a **new PDF export option**
- We're helping companies ensure selection of appropriate response categories by **including definitions in the workspace**

## 1. Company Portal Dashboard



### Tile-based display of key information

- Displays number of active complaints due in under 15 days, number of past due complaints, complaints due within 48 hours, number of unread messages due in under 15 days, number of complaints requiring further information, and number of complaints in progress that are due in under 60 days
- All tiles contain hyperlinks to pre-filtered lists containing more information related to the topic of each tile for easy access and follow-up

## 2. Streamlined Complaint Response Form

### User-friendly response options

- Response information is contained within a single form, with customized fields depending on your desired selection
- Selecting “Response definitions” will open a definitions list to provide clarity regarding the Company Response selection
- “Response preview” function allows you to edit response prior to submission, if needed

What is the company's response? [Response definitions](#)

<input type="radio"/> In progress	<input type="radio"/> Alerted CFPB
<input type="radio"/> Closed with explanation	<input type="radio"/> Duplicate CFPB complaint reported
<input type="radio"/> Closed with monetary relief	<input type="radio"/> Incorrect company
<input type="radio"/> Closed with non-monetary relief	<input type="radio"/> Sent to regulator

### 3. Improved Portal Access Management

#### Manage your account

##### Contact information

First name	Last name
<input type="text" value="Nicholas"/>	<input type="text" value="Johnson"/>
Title	
<input type="text" value="Investigator"/>	
Phone number	
<input type="text" value="(555) 321-3181"/>	
Email	
<input type="text" value="nicholas.johnson@acmebank.com"/>	
<small>Changing your email address will also change your username</small>	

#### Simple “create new user” form

- Primary company POCs will have the ability to create and update user accounts from within the “create new user” form
- Within the form, primary POCs will also be able to set communication preferences, product permissions, and export capabilities for users
- Non-primary POCs can also manage and update their own user account settings within the form

### 4. Enhanced Search and Export

#### Enhanced filtering options

- Search feature allows for users to quickly access a single complaint or group of complaints, whether active and archived
- Searches / exports can be conducted based on ID, name, product, response, sub-issue, dates, and alerts
- All searches / exports and corresponding documents can be exported to a downloadable PDF, Excel, or .csv file

The screenshot shows a web interface for managing complaints. At the top, there are tabs for 'Active' and 'Archive', and an 'Export' button. Below this is a 'Filter and search complaints' section with a 'Hide' button. The filters are organized into four columns: 'Complaint ID' (text input), 'Primary consumer name' (text input), 'Product' (dropdown menu with 'Choose any' selected), and 'Issue' (dropdown menu with 'Select a product first' selected). Below these are 'Sent to company' (with 'From' and 'To' date pickers), 'Due Date' (with 'From' and 'To' date pickers), and 'Alert' (with checkboxes for 'CFPB needs more info', 'Due soon', 'In progress', 'Past due', and 'Unread'). At the bottom of the filter section are 'Apply filters' and 'Clear filters' buttons.

# Next Steps and Contact Information

## Next Steps

To prepare all Company users for the launch of the updated CFPB Company Portal, informative materials and training opportunities, including a revised company portal manual, training webinars, and detailed login instructions will be provided to you by CFPB prior to system go-live. Post go-live support sessions will also be available following system go-live.

## Questions?

If you have questions regarding the new CFPB Portal, please contact Scott Steckel at [Scott.Steckel@cfpb.gov](mailto:Scott.Steckel@cfpb.gov).

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The Consumer Financial Protection Bureau is a 21<sup>st</sup> century agency that helps consumer finance markets work by making rules more effective, by consistently and fairly enforcing those rules, and by empowering consumers to take more control over their economic lives. For more information, visit [consumerfinance.gov](http://consumerfinance.gov).