Leverage Management Portal Version 3 Release

NEW FEATURES IN VERSION 3

This document summarizes ClearEdge's Leverage Management Portal release notes for Version 3, to be launched on August 16th, 2021. The notes describe the enhancements, upgrades, and new features included in this release. Use these notes to help setup your ClearEdge Portal account and optimize the Portal's functionality to ensure your continued success.

TEAM COLLABORATION

Custom Permissions (opt-in)

Until now, the Portal offered a single-permissions level where all users could view/edit all cases sent from their Account. Version 3 introduces an alternative, dual permission level that enables managers to designate two levels of case permissions: (1) view all cases, and (2) view only cases the User is associated with. Alongside this rollout, we've released the ability to associate multiple contacts to a Case, enabling manual sharing for those users with the more restrictive permission level.

Team Case Contacts

With the rollout of variable permissions, we're including the ability to associate multiple contacts to a given Case. Clients can add Contacts to Cases who otherwise would not have had access because of the new feature described above. Additionally, added Contacts will receive notifications when an analyst posts on the Case, and receive the Case's delivery.

Team Action Items

Portal users can now associate members of their team to specific Action Items. The Action Item dashboard includes views to show users and their respective Action Items.

ACCESSIBILITY & ANALYTICS

Academy Engagement in Case Analytics Dashboard

Portal users can now access real-time reporting on their Accounts' engagement in ClearEdge events, webinars, and other content. This information was previously only accessible on Quarterly Business Reviews (QBRs).

Savings Tracker

The ability to track a savings value accredited to ClearEdge is one of our most requested features. In Version 3, users will have access to a picklist on each Case which will represent an estimate of the ClearEdge savings. ClearEdge Account Executives are encouraged to populate the value field when possible, but the client will have the final say.

Enhanced Create New Case Process

The Create New Case form is now easier to navigate across the screens and includes a more obvious submission button. Screens also include additional information and guidance around the questions asked in the form.

Enhanced Notifications

The look and feel of our Welcome and New Post email notifications has been improved. Version 3 also adds a "New Case" notification, which will be sent to the contact of all new Cases, regardless of whether they were entered in the Portal.

SECURITY

Multi-Factor Authentication (opt-in)

Clients can now designate if they want to be opted-in to Multi-Factor Authentication when their users access the Portal. Portal MFA involves downloading an Authenticator app on a mobile device which will provide authentication access each time a user enters the Portal, as an added layer of security.

Enhanced Password Protection

In the continual effort to improve security, we've updated the Password policies for users in the Portal. Passwords must be updated every 180 days and require: (1) at least 12 characters in length, and (2) must include numbers, uppercase and lowercase letters, and special characters.

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