

Treefort Release Notes

November 8, 2024

What's New

Summary of Major Updates

User creation and management update

With the latest update, user creation and management has been simplified, and users are no longer required to complete an ID verification prior to gaining access to their Treefort user account. All user management has now been moved to the **Manage Users** tab, as shown below. **Note:** only Administrators at your organization have access to create and manage users.

Name	Email	Cell Phone	Role	Status	Action
Jane Doe	jdoe12@test.com	+1 7805550000	Admin	Invite Pending	⋮
John Doe	jdoe13@test.com	+1 7805550000	Regular User	Active	⋮
James Smith	jsmith1@test.com	+1 7805550000	Admin	InActive	⋮
Alex Smith	asmith@test.com	+1 7805550000	Admin	Active	⋮
Jennifer Smith	jsmith2@test.com	+1 7805550000	Regular User	Invite Cancelled	⋮

To create a new user, select the **“+ Add User”** button as highlighted above. This will open a user creation popup as shown below, where an Administrator can enter all required user details.

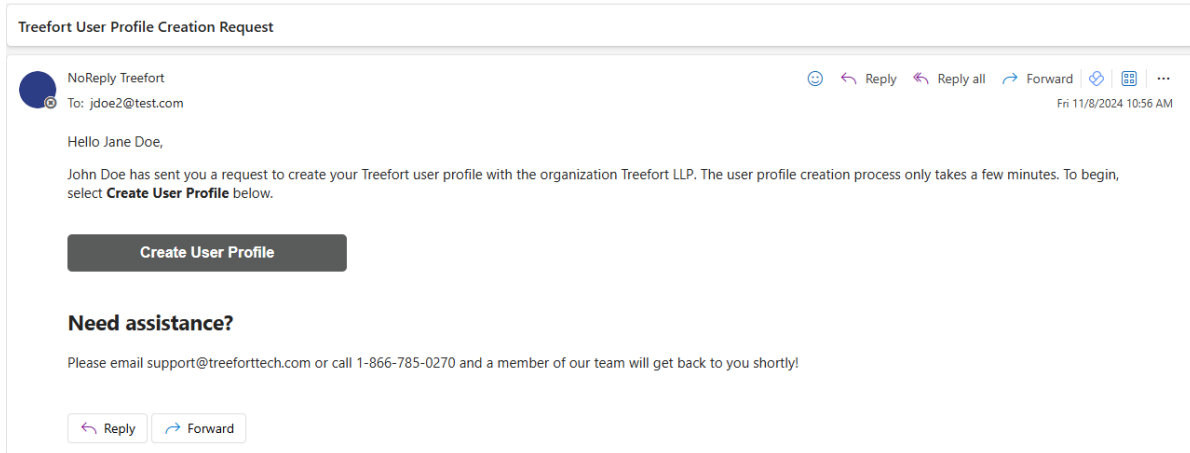
Add User

Please enter all user details and select **Send Invite** to send the user an email to create their user profile. Once they have completed their user profile setup, you will receive an email confirmation and they will be able to log into Treefort.

First Name* Enter First Name	Last Name* Enter Last Name	Email* Enter Email
Cell Phone* +1 Enter Cell Phone	<input type="checkbox"/> Doesn't have last name? Organization* TreeFort LLP	Jurisdiction* Select Jurisdiction
Role* Select Role		

Cancel Send Invite

After selecting **Send Invite**, the user will receive an email with a link to create their user profile, as shown below. This link does not expire, as the user will be required to verify their email and cell phone via two-factor authentication before their account can be created.

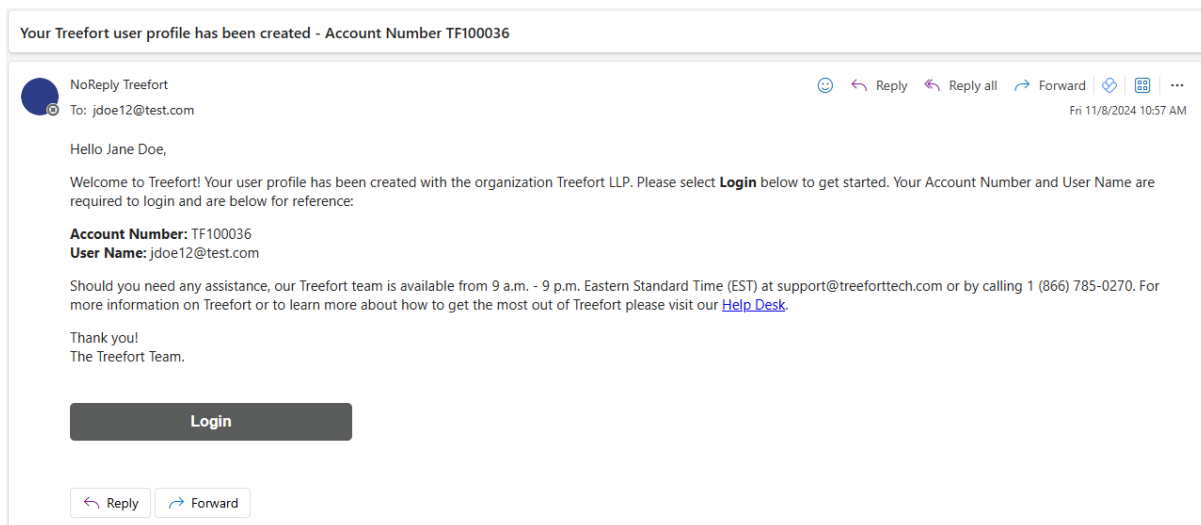


Note: the user will be added to the list of users in the Manage Users tab with a status of **Invite Pending**, indicating that the user has been sent the email invitation to create their user profile. More information on user statuses is provided later in this section.

The screenshot shows a table with columns: Name, Email, Cell Phone, Role, Status, and Action. The table contains one row for 'Jane Doe' with email 'jdoe12@test.com', cell phone '+1 7805550000', and role 'Admin'. The 'Status' column for Jane Doe contains a blue pill-shaped button labeled 'Invite Pending', which is highlighted by a green arrow pointing to it from the right.

Name	Email	Cell Phone	Role	Status	Action
Jane Doe	jdoe12@test.com	+1 7805550000	Admin	Invite Pending	

After selecting the link to create their user profile, the user will complete a two-factor authentication step, review and accept the Treefort Terms and Conditions, set their email notification preferences, and create their password. The entire user profile creation process will only take a few minutes, and once completed, the user will receive an email with their login information and link to login, as shown below.



Note: the user's status in the Manage Users tab will change to **Active**, indicating that the user has successfully created their user profile. More information on user statuses is provided later in this section.

Organization						
TreeFort LLP (TF100030)						
Name	Email	Cell Phone	Role	Status	Action	
Jane Doe	jdoe12@test.com	+1 7805550000	Admin	Active	⋮	

The Administrator who sent the user the invitation to create their user profile will also receive an email to confirm that the user has created their user profile, as shown below.

New Treefort User Profile Created

NoReply Treefort
To: John Doe
Fri 11/8/2024 10:57 AM

Hello John Doe,

Please be advised that Jane Doe has created their Treefort user profile and is now an active user with the organization Treefort LLP.

To view and manage all users, please select **Manage Users** below.

[Manage Users](#)

[Reply](#)
[Forward](#)

From the Manage Users tab, Administrators at your organization can view and manage all users in various statuses, as shown below.

Organization						
TreeFort LLP (TF100030)						
Name	Email	Cell Phone	Role	Status	Action	
Jane Doe	jdoe12@test.com	+1 7805550000	Admin	Invite Pending	⋮	
John Doe	jdoe13@test.com	+1 7805550000	Regular User	Active	⋮	
James Smith	jsmith1@test.com	+1 7805550000	Admin	InActive	⋮	
Alex Smith	asmith@test.com	+1 7805550000	Admin	Active	⋮	
Jennifer Smith	jsmith2@test.com	+1 7805550000	Regular User	Invite Cancelled	⋮	

All user statuses are outlined below:

Active Active

Users with the status of Active have successfully created their user profile and are able to log into the Treefort application using their login credentials. Action options available for users with this status are:

- **Edit:** edit the selected user's information (e.g., name, cell phone number, role, etc.) on their behalf. To save the changes, the Administrator must enter their Treefort password.
- **View Audit Details:** view an audit trail of any modifications made to the selected user's profile (e.g., name changes, phone number changes, role changes, etc.)
- **Deactivate:** set the selected user's status to **Inactive**. Once set, the selected user will no longer be able to log into Treefort using their credentials. The user can be reactivated at any time.

Inactive Inactive

Users with the status of Inactive have successfully created their user profile but are **not** able to log into the Treefort application using their login credentials because their account has been deactivated by an Administrator. Action options available for users with this status are:

- **Edit:** edit the selected user's information (e.g., name, cell phone number, role, etc.) on their behalf. To save the changes, the Administrator must enter their Treefort password.
- **View Audit Details:** view an audit trail of any modifications made to the selected user's profile (e.g., name changes, phone number changes, role changes, etc.)
- **Activate:** set the selected user's status to **Active**. Once set, the selected user will need to reset their password and will then be able to log into Treefort using their credentials.

Invite Pending Invite Pending

Users with the status of Invite Pending have been sent an email invitation by an Administrator to create their user profile but have not completed the user profile creation process yet. Once their user profile is created, their status will automatically change to **Active**. Action options available for users with this status are:

- **Edit:** edit the selected user's pending account creation invitation (e.g., the user's name, email address, cell phone, role, etc.). If saved, a new account creation invitation email will be sent to the selected user.
- **Resend Invite:** resend the account creation invitation email to the selected user.
- **Cancel Invite:** cancel the pending account creation invitation. If selected, the pending account creation link will be expired, and the user's status will change to **Invite Cancelled**.

Invite Cancelled Invite Cancelled

Users with the status of Invite Cancelled have been sent an email invitation by an Administrator to create their user profile but an Administrator has subsequently cancelled the invitation. The original link to create their user profile will be expired, however an Administrator can resend the invitation to this user at any time. Action options available for users with this status are:

- **Edit:** edit the selected user's cancelled account creation invitation (e.g., the user's name, email address, cell phone, role, etc.). If saved, a new account creation invitation email will be sent to the selected user, and the user's status will change to **Invite Pending**.
- **Send Invite:** send a new account creation invitation email to the selected user without editing any information from the previous invitation. If selected, the user's status will change to **Invite Pending**.
- **Remove User:** remove the user from the Manage Users page. If the user is removed, the email address associated with the user can be reused in the future.

New Identified Risk – Date of Death

During the ID verification process, if the credit file returned for a client indicates that they are deceased, a new **High Risk** Identified Risk will be flagged in the Fraud section of a Treefort report. An example of this Identified Risk is shown below and will include the **year** and **month** that the individual associated with the credit file was reported as deceased.

High Risk

The information obtained from the individual's credit file indicates that this individual is deceased as of **2024-01**.

Facial Analysis – Improved Retry Feedback

To increase success rates for the facial analysis step in the ID verification process, the Action Required page displayed to clients after an unsuccessful face scan has been enhanced, including the following the updates:

- New feedback event types have been handled.
- Existing retry messaging has been simplified, and clear guidance is provided where applicable to increase the success rate of subsequent attempts.
- User experience has been improved with updates to the Action Required page. Additionally, images have been incorporated into the Action Required page for even greater clarity. See below for an example of the retry feedback after a failed face scan.

