OML Partner Features & User Manual

How to SignUp & Login?

- 1. Agent Sign-Up-
- 2. Agent Login-





SignUp - Step 1:

- 1. Enter Mobile Mobile number
- 2. Enter OTP received on mobile number



One time password will be sent to your mobile number

Please grant the permission to access sms







How to Login?

Step 1: Email ID or Mobile number Step 2: Password

10:59 Introduction of Home Tab 1. Total leads purchased 0 - Leads purchased by you from paid leads section 2. Total free leads assigned - Till date all the loan leads assigned to you 3. Lead's count according to lead status 4. Pro agent subscription - Convert free account to pro account



Introduction of Home Tab

- 1. Free leads assigned to you
 - Borrowers who pay us to apply for loan
 - These leads has all the details & Documents attached

2. Loan details

- Borrower details
- Loan requirement details
- Borrower documents
- Borrower contact details
- Chat/Call borrower
- Change status to Completed/Rejected











How to become a pro agent?

1. Go to Home tab

tal Loans	182	Purchased	Leads	0
0 Completed	0 Accepted	55 Rejected		green
108	🦉 Become a	Pro Agent		
oan List			(2 =
	3236 Persona 1019 00:38	•	In Pro	gress
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20 Aug 7 75,000 to 1,00,000 Loan Amount Detail ancle: Commans LID-00	1019 00:38	- Tenune	Self Emplo Occupati Status	yed on ected

2. Tap on Become a pro Agent



2. Tap on proceed to pay and become a PRO agent

0	Verified Agent Tag All Paid agents are marked as Verified agents which helps you build reliable profile.	X Not Application	~
0	Realtime Monitoring Daily elerts & updates in App, SMS & Emails. Check realtime reports & stats via Agent App.		
0	Profile Marketing Send Loan Offers to local app users of your city to boost your profile for getting more leads.	×-2.54 Martin	~
0	Reviews Management Reply to each review for your profile to build customer engagement and trust.	X	~
0	Sponser Ads Disable Google ads from Web Portal & Mobile App to work ads free!	E-main L frage	-
1	Customized Leads Configure leads quality from settings to receive high quality leads.	×	~
ً₿	Import & Export Database Add, Update, Delete, Export borrowers database with documents, reports.	×	~
0	Platform Features as CRM Complete Software for Loan Agents - Realtime Chatting - Loans Management - Loans Progress Tracking - Documents Verification - Realtime Alerts, Updates & Reminders	Single Char had Leveld Manay	A States
6	OfferMeLoan Support Access to Website & Mobile App from anywhere at anytime. Training included. ^{In}	K Price Speed	Shart Support of Range Stratt Con-
	Become a Pro Agent	at just	*100
	PROCEED		

Borrower details



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10:59

How to chat with borrower?

1. Go to Chat tab



2. Tap on Borrower Name



2. Chat with borrower & send messages



Agent Account details

- 1. How to change agent profile?
 - Tap on More Tab to open settings.
- 2. Profile
 - Tap on Edit profile to modify your profile.
- 3. Password
 - Tap on Change Password to change.
- 4. Referral
 - Tap on Referral List for people referred by you.
- 5. Payment
 - Tap on Payment for payment history.
- 6. Pro Agent
 - Tap to pay & become a pro agent.
- 7. Pro Agent
 - Tap to get support from OML support team.

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More	9	
	Write Your revie We help you to express your e	
	****	*
	Edit Profile	>
۲	Change Password	>
÷	Referral List	>
-	Payment	>
8	Become a Pro Agent	>
?	Get Help	>
	Sign Out	
	OFFERME India's 1st Platform for Find	
	WE ARE A PLATFORM Dur mission is to change the way how banks interact and transact via k	w borrowers and
0		-
1.00		

How to Reject loan leads?

1. Go to Leads tab

oan List		Q =
LID-0032	36 [Personal 00:38	In Progress
75,000 to 1,00,000	-	Self Employed
Loan Amount	Loan Tenure	Occupation
Detail	Message	Status
uncler Comment:		
LID-00314 18 Aug 2019	14 Personal 1642	Rejected
75,000 to 1.00,000	÷.	Salaried
Loan Amount	Loan Tenure	Occupation
Detail	Message	Status
ancier Comment: not ef	gible	
LID-00315	11 Personal 12:17	In Progress
1 Lakh to 2 Lakh	3 Years	Salaried
Loan Amount	Lisan Tenure	Occupation
1		
(i) (internet	A Partiants	2 3

2. Tap on Status button



2. Select the required status, enter comment & Submit

0.	mpleted 🖲 in Progress 🔿 Rejected 🔿 Accepted
then yo Interac	elect Completed Or Rejected and Proceed to Submit ur Loan will be blocked and you will stop Chatting an ting with the Borrower for this Loan. wish to Confirm?
Enter	comment:
Ente	Here
	SUBMIT

How to Filter loan leads?

1. Go to Leads tab

		0.814
	36 [Personal	In Progress
30 Aug 2019	00:38	
75,000 to 1,00,000	2	Self Employed
Loan Amount	Loan Tenure	Occupation
Detail	Message	Status
cler Comment:		
LID-00314	14 Personal	24797
18 Aug 2019		Rejected
75,000 to	4	Salaried
1,00,000 .can Amount	Loan Tenure	Occupation
Detail	Message	Status
dier Comment: not els	gibile	
	1] Personal	In Progress
17 Aug 2019	12:17	
1 Lakh to 2 Lakh	3 Years	Salaried
oan Amount	Loan Tenure	Occupation
-	16	2
	- Feidlands	1 8

2. Tap on Filter



2. Enter the required range of filter

FROM DATE	TO DATE		
Select date	Select date		
TYPE OF LOAN BORROWER			
Select Loan Type			
LOAN AMOUNT			
Select Loan Amount			
STATUS:			
Completed			

CLEAR FILTERS