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

OFFERMI	LOAN			(
tal Loans	182 🕫	urchased L	eeds	0
0 Campleted	0 Accepted	55 Rejected		127 progress
<i>a</i>	Become a Pr	o Agenti		
oan List				Q =
LID-0032 30 Aug 201 75,000 to 1,00,000 Loan Amount	236 (Personal 19 00:38 Loan Ter	hune	In F Self Em	Progress
LID-0032 30 Aug 201 75,000 to 1,00,000 Loen Amount	236 Personal 19 00:38 Loan Ter Massa	ure	In F Self Emp Occup	Progress ployed action
LID-0033 20 Aug 201 75,000 to 1,00,000 Loan Amount Detail sender Comments LID-0033 19 Aug 201 75,000 to 100 000	236 Personal 19 00-38 Loan Ter Messay 144 Personal 9 16-42	pune P	In F Self Eng Occup Statu	Progress ployed action Rejected

2. Tap on Become a pro Agent



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

	PROCEED	
	Become a Pro Agent at just	100
Ð	OfferMeLoan Support	And Support
1	Platform Features as CRM Complete Software for Loan Agents - Realtime Chetting - Loarn Management - Loarn Progress Tracking - Documents Verification - Realtime Alerts, Updates & Reminders	×
1	Import & Export Database Add, Update, Delete, Export borrowers database with documents, reports.	~
12	Configure leads quality from settings Konfigure leads quality leads.	~
0	Sponser Ads Disable Google ads from Web Portal & Konst Mobile App to work ads free!	
0	Reviews Management X Reply to each review for your profile to build customer engagement and trust.	~
0	Profile Marketing Send Loan Offers to local application of your city to boost your profile for getting more leads.	~
8	Realtime Monitoring Daily aierts 6 updates in App. SMS 6 Emails. Chock realtime reports 6 stats via Agent App.	-
0	Al Paid agents are marked as Verified agents which helps you build reliable profile.	-

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.

11:01		HU AI HU AI 18
More	2	
	Write Your revie We help you to express your e	w ! xperiences
	****	*
	Edit Profile	>
۲	Change Password	>
÷	Referral List	>
1	Payment	>
8	Become a Pro Agent	>
?	Get Help	>
	Sign Out	
	OFFERME India's 1st Platform for Fine	LOAN ancial Services
	WE ARE A PLATFORM Dur mission is to change the way ho banks interact and transact via b	M! w borrowers and oan agents!
0		
(20)		- 8-/ CD

How to Reject loan leads?

1. Go to Leads tab

in List		Q
LID-00323	5 (Personal 00:38	In Progress
75,000 to	-	Self Employed
Joan Amount	Loan Tenure	Occupation
Detail	Message	Status
cier Comment:		
LID-003144 18 Aug 2019 1	1 Personal 6/42	Rejected
75,000 to	<u>_</u>	Salaried
oan Amount	Loan Tenune	Occupation
Detail	Message	Status
liev Comment: not elig	ble	
LID-003131 Personal 17 Aug 2019 12:17		In Progress
1 Lakh to 2	3 Years	Salaried
oan Amaunt	Lisen Tenure	Occupation
-	11	1
	5	1 19

2. Tap on Status button



2. Select the required status, enter comment & Submit

Completed O If you select Comp then your Loan will Interacting with th Do you wish to Co	In Progress Rejected Or Rejected and Proceed to Submit be blocked and you will stop Chatting and a Borrower for this Loan, nimm?
Enter comment	:
Enter Here	
	SUBMIT

How to Filter loan leads?

1. Go to Leads tab

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LID-00323 30 Aug 2019	ló (Personal 00:38	In Progress	
75,000 to	-	Self Employed	
Loan Amount	Loan Tenure	Occupation	
Detail	Message	Status	
ncier Comment:			
LID-00314 18 Aug 2019	4 Personal 1642	Rejected	
75,000 to	4	Salaried	
Loan Amount	Loan Tenure	Occupation	
Detail	Message	Status	
scier Comment: not ell	gible.		
LID-003131 Personal 17 Aug 2019 12:17		In Progress	
1 Lakh to 2 Lakh	3 Years	Salaried	
Loan Amount	Loan Tenure	Occupation	
1		7.	
9 B	- 45		

2. Tap on Filter



2. Enter the required range of filter

Advance Search			
📅 FROM DATE	🔂 TO DA	TE	
Select date	Select date		
TYPE OF LOAN BORROWER			
Select Loan Type			
LOAN AMOUNT			
Select Loan Amount			
STATUS:			
V Completed			
 In process 			
× Rejected			

CLEAR FILTERS