

How to Use New Access Levels Table:

We're excited to introduce the **Access Levels Table**, a powerful new feature designed to make managing user permissions within Nimo easier, more customizable, and transparent.

You can access this functionality by navigating to:

Administration > User Access

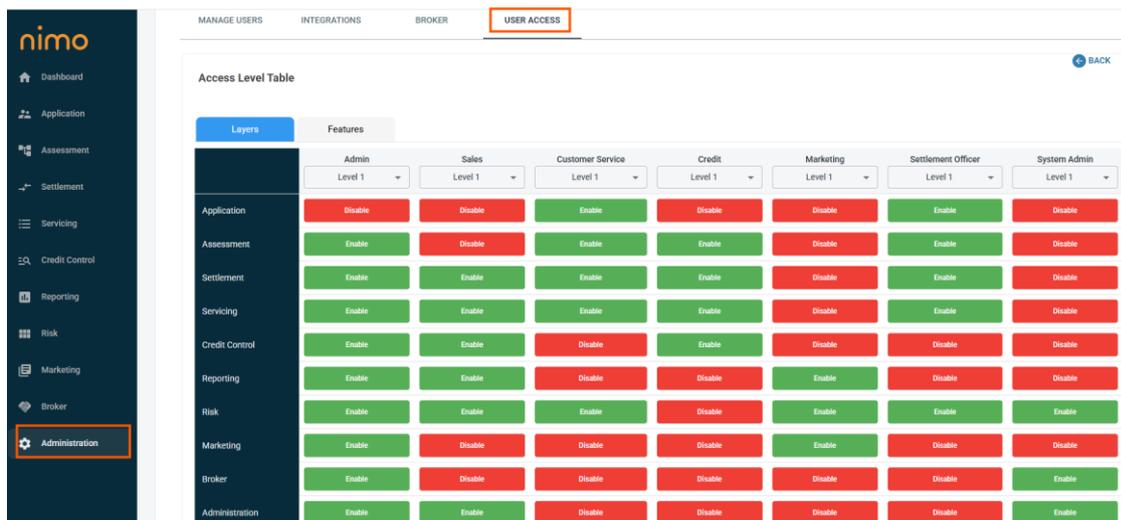
Layers: Left-Hand Panel Options within Staff Portal (Application, Assessment etc)

Features: Integrations and Functions within each layer (Edit, Valuations etc)

1. Layers Tab:

Within the **Layers** tab, Administrators can fully control and assign **Access Levels** across various roles within your organization, such as Sales, Credit, Customer Service etc. It ensures your team interacts with the Nimo platform efficiently and in alignment with their responsibilities.

The table will appear as per the below. If access is **Enabled**, icons on the table will be **Green**. If it is **Disabled**, they will be **Red**.



The screenshot shows the Nimo user interface with the 'Administration' menu item highlighted in the left-hand panel. The main content area displays the 'User Access' tab, which contains an 'Access Level Table'. The table has two tabs: 'Layers' (selected) and 'Features'. The table lists various layers (Application, Assessment, Settlement, Servicing, Credit Control, Reporting, Risk, Marketing, Broker, Administration) and roles (Admin, Sales, Customer Service, Credit, Marketing, Settlement Officer, System Admin). Each cell in the table contains either 'Enable' (green) or 'Disable' (red).

Layers	Features						
	Admin Level 1	Sales Level 1	Customer Service Level 1	Credit Level 1	Marketing Level 1	Settlement Officer Level 1	System Admin Level 1
Application	Disable	Disable	Enable	Disable	Disable	Enable	Disable
Assessment	Enable	Disable	Enable	Enable	Disable	Enable	Disable
Settlement	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Servicing	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Credit Control	Enable	Enable	Disable	Enable	Disable	Disable	Disable
Reporting	Enable	Enable	Disable	Disable	Enable	Disable	Disable
Risk	Enable	Enable	Enable	Disable	Enable	Enable	Enable
Marketing	Enable	Disable	Disable	Disable	Enable	Disable	Disable
Broker	Enable	Disable	Disable	Disable	Disable	Disable	Enable
Administration	Enable	Enable	Disable	Disable	Disable	Disable	Enable

How it Works

- The **left-hand column** displays all active **Layers** within Nimo (e.g., Application, Assessment, Settlement).
- Across the **top row**, **Roles** are listed (e.g., Admin, Customer Service, Credit).
- Within the table, you can select the appropriate **Access Level** for each Role per Layer.
- Adjustments dynamically update the table, allowing you to control which Layers are available to each Role.

Setting Access Levels

To configure access:

1. Locate the desired **Role** and **Layer** in the table.

Access Level Table



	Features						
	Admin	Sales	Customer Service	Credit	Marketing	Settlement Officer	System Admin
	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Application	Disable	Disable	Enable	Disable	Disable	Enable	Disable
Assessment	Enable	Disable	Enable	Enable	Disable	Enable	Disable
Settlement	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Servicing	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Credit Control	Enable	Enable	Disable	Enable	Disable	Disable	Disable
Reporting	Enable	Enable	Disable	Disable	Enable	Disable	Disable
Risk	Enable	Enable	Enable	Disable	Enable	Enable	Enable
Marketing	Enable	Disable	Disable	Disable	Enable	Disable	Disable
Broker	Enable	Disable	Disable	Disable	Disable	Disable	Enable
Administration	Enable	Enable	Disable	Disable	Disable	Disable	Enable

2. Select the appropriate **Access Level** for that Role.

Access Level Table

	Features						
	Admin	Sales	Customer Service	Credit	Marketing	Settlement Officer	System Admin
	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Application	Disable	Level 1 Level 2 Level 3	Enable	Disable	Disable	Enable	Disable
Assessment	Enable		Enable	Enable	Disable	Enable	Disable
Settlement	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Servicing	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Credit Control	Enable	Enable	Disable	Enable	Disable	Disable	Disable
Reporting	Enable	Enable	Disable	Disable	Enable	Disable	Disable
Risk	Enable	Enable	Enable	Disable	Enable	Enable	Enable
Marketing	Enable	Disable	Disable	Disable	Enable	Disable	Disable
Broker	Enable	Disable	Disable	Disable	Disable	Disable	Enable
Administration	Enable	Enable	Disable	Disable	Disable	Disable	Enable

3. Choose whether to **Enable** or **Disable** the Layer.

Access Level Table

Layers	Features						
	Admin Level 1	Sales Level 1	Customer Service Level 1	Credit Level 1	Marketing Level 1	Settlement Officer Level 1	System Admin Level 1
Application	Disable	Disable	Enable	Disable	Disable	Enable	Disable
Assessment	Enable	Disable	Enable	Enable	Disable	Enable	Disable
Settlement	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Servicing	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Credit Control	Enable	Enable	Disable	Enable	Disable	Disable	Disable
Reporting	Enable	Enable	Disable	Disable	Enable	Disable	Disable
Risk	Enable	Enable	Enable	Disable	Enable	Enable	Enable
Marketing	Enable	Disable	Disable	Disable	Enable	Disable	Disable
Broker	Enable	Disable	Disable	Disable	Disable	Disable	Enable
Administration	Enable	Enable	Disable	Disable	Disable	Disable	Enable

4. Click the **Green Tick** to confirm and apply your selection. This ensures the Access Level is saved and enforced.

Access Level Table

Layers	Features						
	Admin Level 1	Sales Level 1	Customer Service Level 1	Credit Level 1	Marketing Level 1	Settlement Officer Level 1	System Admin Level 1
Application	Disable	Enable	Enable	Disable	Disable	Enable	Disable
Assessment	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Settlement	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Servicing	Enable	Enable	Enable	Enable	Disable	Enable	Disable
Credit Control	Enable	Enable	Disable	Enable	Disable	Disable	Disable
Reporting	Enable	Enable	Disable	Disable	Enable	Disable	Disable
Risk	Enable	Enable	Enable	Disable	Enable	Enable	Enable
Marketing	Enable	Disable	Disable	Disable	Enable	Disable	Disable
Broker	Enable	Disable	Disable	Disable	Disable	Disable	Enable
Administration	Enable	Enable	Disable	Disable	Disable	Disable	Enable

This feature allows you to **fully manage and customize Access Levels for your team members**—whether they work in Sales, Credit, Customer Service etc. It ensures each user interacts with the Nimo platform in a way that aligns with their role, promoting both efficiency and effective system use.

2. Features Tab:

The Features Tab allows administrators to control what **Features** within each individual **Layer** that their staff have access to and can edit.

It will appear as per the below.

Again, if access is **Enabled**, icons on the table will be **Green**. If it is **Disabled**, they will be **Red**.

Layers	Features						
	Admin Level 3	Sales Level 1	Customer Service Level 1	Credit Level 1	Marketing Level 1	Settlement Officer Level 1	System Admin Level 1
DASHBOARD							
Dashboard form edit	Disable	Disable	Disable	Disable	Enable	Disable	Disable
APPLICATION							
Application edit	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Credit Bureau	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Change Status	Enable	Disable	Disable	Disable	Disable	Disable	Disable
Edit Digit ID Locked	Disable	Disable	Disable	Disable	Disable	Disable	Disable
Application Reassign	Enable	Disable	Enable	Enable	Disable	Disable	Disable
ASSESSMENT							
Assessment edit	Disable	Enable	Disable	Enable	Disable	Disable	Disable
Credit Bureau	Disable	Enable	Enable	Enable	Disable	Disable	Disable
Valuations	Disable	Enable	Enable	Enable	Disable	Disable	Disable
Lands Title	Disable	Enable	Enable	Enable	Disable	Disable	Disable
Change Status	Disable	Enable	Disable	Disable	Disable	Disable	Disable
Submit to Documents	Enable	Enable	Enable	Enable	Disable	Disable	Disable

How it Works

- The **left-hand column** displays all **Features** available within each **Layer** in Nimo.
- The top row displays the various Roles (e.g., Admin, Customer Service, Credit) and their Access Levels.
- In the table, as well as assigning the appropriate Access Level to each Role for every Layer, Administrators can also specify which **Features** within each Layer users can access.
- Adjustments dynamically update the table, allowing you to control which specific Features are available to each Role.

Assigning Access to Features

1. Locate the desired **Role**, **Layer** and **Features** in the table.

Layers	Admin	Sales	Customer Service	Credit	Marketing	Settlement Officer	System Admin
	Level 3	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
DASHBOARD							
Dashboard form edit	Disable	Disable	Disable	Disable	Enable	Disable	Disable
APPLICATION							
Application edit	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Credit Bureau	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Change Status	Enable	Disable	Disable	Disable	Disable	Disable	Disable
Edit Digit ID Locked	Disable	Disable	Disable	Disable	Disable	Disable	Disable
Application Reassign	Enable	Disable	Enable	Enable	Disable	Disable	Disable
ASSESSMENT							
Assessment edit	Disable	Enable	Disable	Enable	Disable	Disable	Disable
Credit Bureau	Disable	Enable	Enable	Enable	Disable	Disable	Disable
Valuations	Disable	Enable	Enable	Enable	Disable	Disable	Disable
Lands Title	Disable	Enable	Enable	Enable	Disable	Disable	Disable
Change Status	Disable	Enable	Disable	Disable	Disable	Disable	Disable
Submit to Documents	Enable	Enable	Enable	Enable	Disable	Disable	Disable
Summary Page	Enable	Disable	Enable	Enable	Disable	Disable	Disable

2. Select the appropriate **Access Level** for that Role.

Layers	Admin	Sales	Customer Service	Credit	Marketing	Settlement Officer	System Admin
	Level 3	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
DASHBOARD							
Dashboard form edit	Level 1 Level 2 Level 3	Disable	Disable	Disable	Enable	Disable	Disable
APPLICATION							
Application edit	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Credit Bureau	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Change Status	Enable	Disable	Disable	Disable	Disable	Disable	Disable
Edit Digit ID Locked	Disable	Disable	Disable	Disable	Disable	Disable	Disable
Application Reassign	Enable	Disable	Enable	Enable	Disable	Disable	Disable

3. Choose whether to **Enable** or **Disable** specific Features.

Layers	Features						
	Admin	Sales	Customer Service	Credit	Marketing	Settlement Officer	System Admin
	Level 3	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
DASHBOARD							
Dashboard form edit	Disable	Disable	Disable	Disable	Enable	Disable	Disable
APPLICATION							
Application edit	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Credit Bureau	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Change Status	Enable	Disable	Disable	Disable	Disable	Disable	Disable
Edit Digit ID Locked	Disable	Disable	Disable	Disable	Disable	Disable	Disable
Application Reassign	Enable	Disable	Enable	Enable	Disable	Disable	Disable

- Click the **Green Tick** to confirm and apply your selection. This ensures the Access Level to each Feature is saved and enforced.

Layers	Features						
	Admin	Sales	Customer Service	Credit	Marketing	Settlement Officer	System Admin
	Level 3	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
DASHBOARD							
Dashboard form edit	Enable	Disable	Disable	Disable	Enable	Disable	Disable
APPLICATION							
Application edit	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Credit Bureau	Disable	Disable	Enable	Enable	Disable	Disable	Disable
Change Status	Enable	Disable	Disable	Disable	Disable	Disable	Disable
Edit Digit ID Locked	Disable	Disable	Disable	Disable	Disable	Disable	Disable
Application Reassign	Enable	Disable	Enable	Enable	Disable	Disable	Disable

This update allows full **control and customization** over which **Features** within each Layer of Nimo are accessible to staff. It ensures that each user engages with the platform in a way that aligns with their specific role, supporting both efficient workflows and effective use of the system.

Please see further examples below for how the Access Levels Table operates within Nimo:

	Layer	Layer	Feature	Outcome
Example 1	Assessment	Application	Application (edit)	1. Assessment layer visible (left panel) 2. Application layer hidden (left panel) 3. View Application button (top right) visible / read-only (no edits allowed)
Example 2	Assessment	Application	Application (edit)	1. Assessment layer visible (left panel) 2. Application layer hidden (left panel) 3. View Application button (top right) visible / Editable
Example 3	Application	Assessment	Application (edit)	1. Application layer visible (left panel) 2. Assessment layer hidden (left panel) 3. View Assessment button (top right) - Overview page view only

ENABLED
DISABLED

Example 1

- **Assessment layer:** ENABLED
- **Application layer:** DISABLED
- **“Application (edit)” feature:** DISABLED

Result:

1. The Assessment layer appears in the left-hand panel.
2. The Application layer is hidden.
3. A **View Application** button shows up in the top-right, but opening it puts you into **read-only** mode (no edits allowed).

Example 2

- **Assessment layer:** ENABLED
- **Application layer:** DISABLED

- “Application (edit)” feature: **ENABLED**

Result:

1. The Assessment layer appears in the left-hand panel.
 2. The Application layer is hidden.
 3. The **View Application** button appears in the top-right, and when you open it, the application is **fully editable**.
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Example 3

- Application layer: **ENABLED**
- Assessment layer: **DISABLED**
- “Application (edit)” feature: **ENABLED**

Result:

1. The Application layer appears in the left-hand panel.
2. The Assessment layer is hidden.
3. A **View Assessment** button appears in the top-right, but it only takes you to an **overview** (read-only) of the assessment.