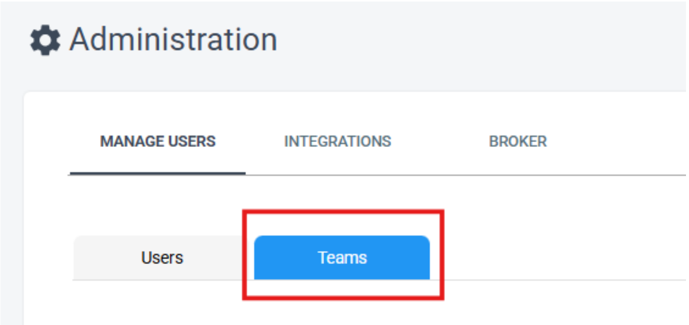
New Teams functionality

What's New:

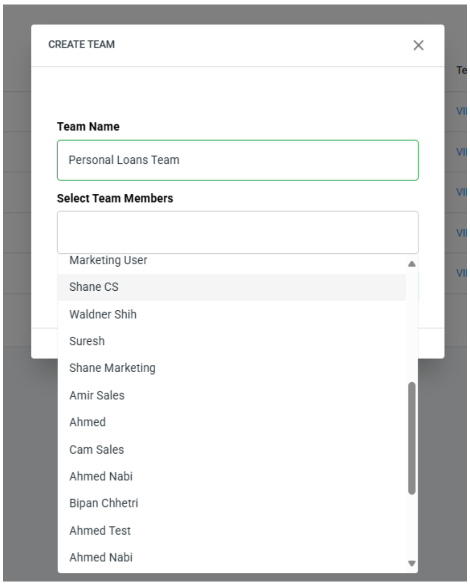
Lenders will now be able to create and manage teams inside Nimo and assign purpose specific applications to the members within that team, which would give the team members access to only those applications

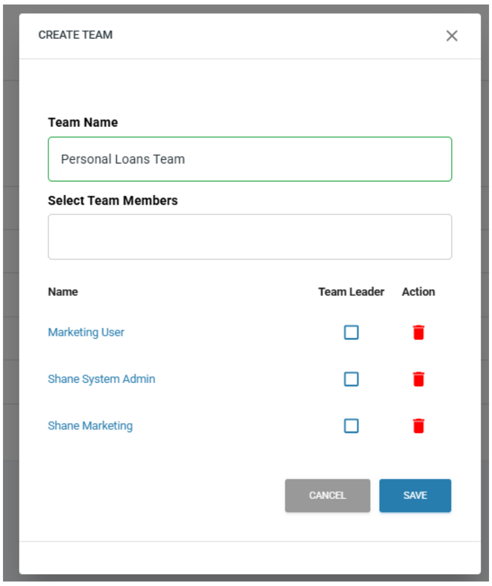
How to set up your teams:

1. Navigate to Administration > Manage Users > Teams

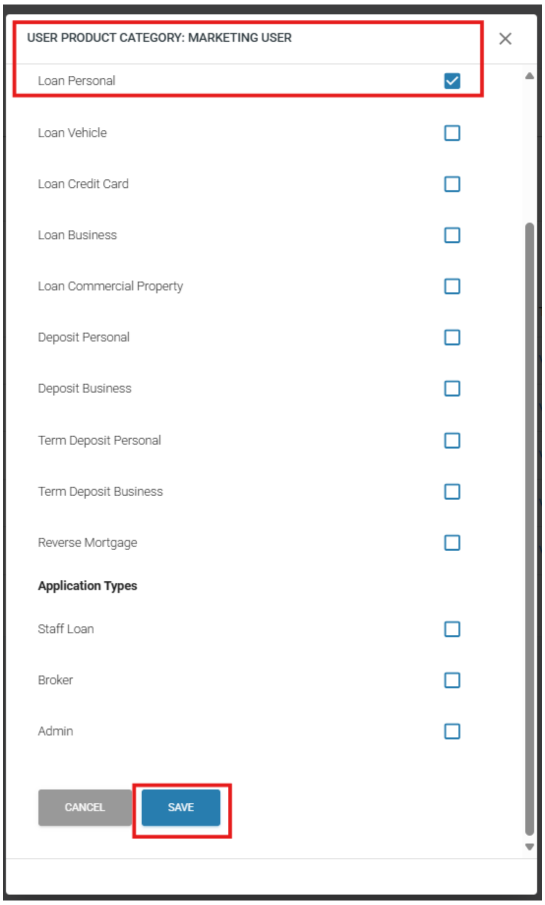


2. Click on Add Team, a pop-up appears, fill in the team's name and start adding members to the team via the dropdown
   Note: A team member can be a part of one team at a time.





3. Click on the individual names of the Team members (in blue) you've added to assign them loan application categories and click Save. You can select from a range of Product categories and application types as below



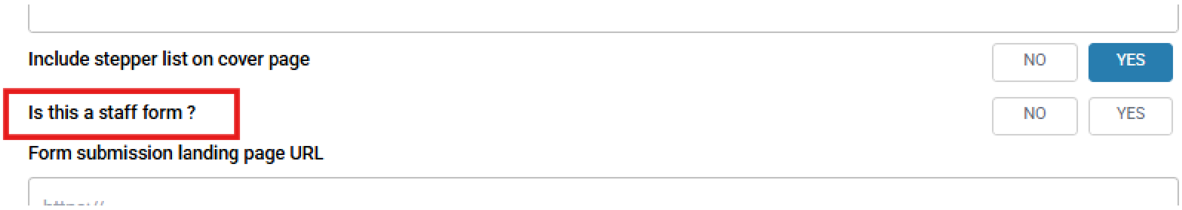
4. Additionally, you can nominate a Team Leader (DLA: Admin level 3 preferred) for the team who will be able to
   a. See theirs and everyone's applications from the team
   b. Assign unassigned (in Enquiry) applications to designated team members
5. Click Save to save all your changes
6. The Team members designated to specific Loan categories will only be able to see and work on those applications
7. The Team Leader / Admin will be able to see everyone's applications and assign them to designated team members.

Staff Loan forms enablement

A new configuration for staff led forms is introduced in Marketing layer where in lenders can select if a particular application form is a staff form and all the applications filled with the staff form will be visible to the team member who is enabled for staff loan applications.

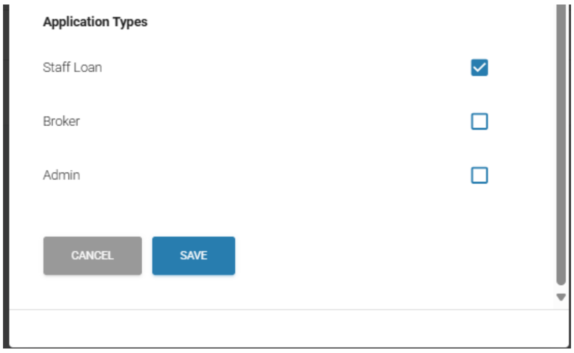
To configure a staff form

Navigate to Marketing > Form Builder> Edit > Click Yes for the below question and click Save



Note: Forms filled after this configuration is in place will be considered as Staff Loans

Navigate to Administration > Teams to enable staff loans and its respective loan categories to the members of your choice.



Once enabled, this form will be considered a staff form and only the team members for whom staff loans and their corresponding Loan categories are enabled would be able to work on those applications.

Eg: A Team member is assigned Staff Loans and category Loan Residential; they'll only be able to see Residential loan applications which are Staff loans.

IMPORTANT: Best Practices and Use cases for efficient Teams Functionality

1. It is advised that a staff member with DLA access of Admin level 3 be designated as the team leader and all categories and types be enabled for them for efficient team functioning.
2. Ticking only Staff Loan and failing to tick its respective loan categories would result in not displaying any applications for that team member.
3. Ticking only Broker Loan and failing to tick its respective loan categories would result in not displaying any applications for that team member.
4. Ticking Staff loan and its respective loan categories will only display Applications which have been submitted via Staff forms
5. Ticking Broker loan and its respective loan categories will only display Applications which have come via Broker forms