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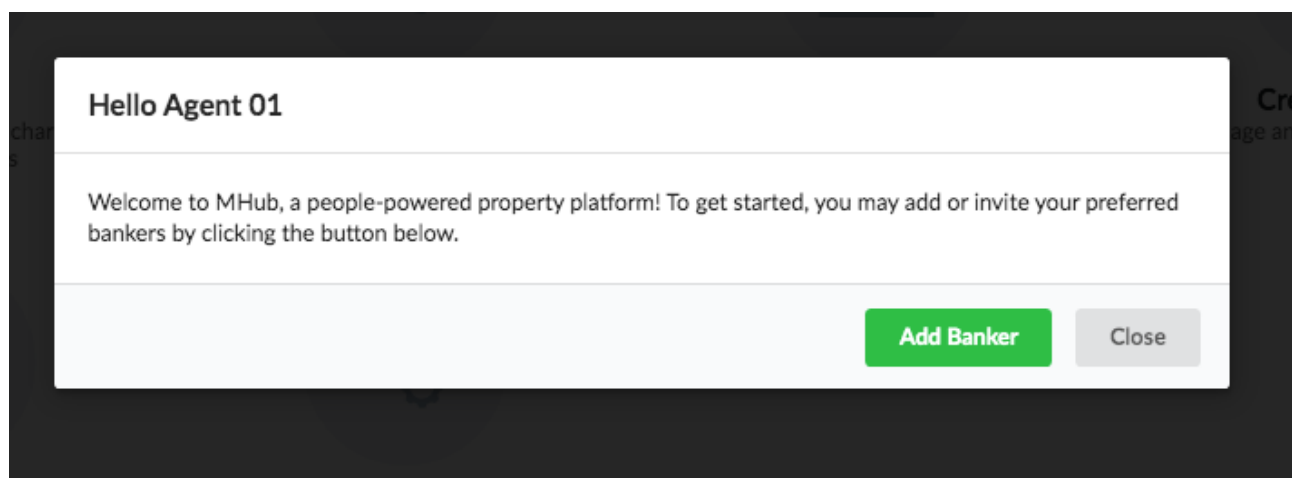
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How can Agents set preferred bankers?

3 years ago · Updated

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For user role Agents, they are able to see Preferred Banker icon so they can add in their own favourite bankers and can easily assign loan cases to them during booking. There will be a prompt for first-time login.

1. Click on Settings
2. Click on Preferred Banker
3. Add Banker

Preferred Bankers

Edit

1	Bank	Nick Lim Nicholas Bank Brickquarters	Total	Pending	Approved	Success	Rejected
			11	2	0	1	0
2	Bank	David Teh David Teh Bank Brickquarters	Total	Pending	Approved	Success	Rejected
			22	3	0	3	15
3	HSBC	Helmi Isa Helmi Isa HSBC Bank Kota Kemuning	Total	Pending	Approved	Success	Rejected
			15	0	0	0	5

Add Banker

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