

Productivity Features

There are several productivity Features within CreditSnap

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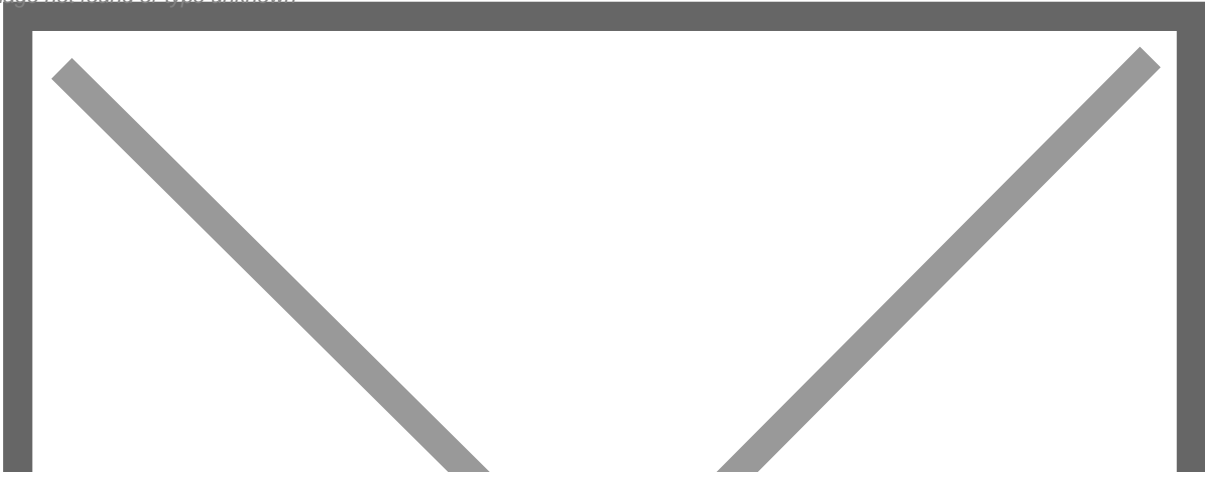
Throughout this article, you will find references to "three dots menu" in the dashboard, and "hamburger menu" on the application page. See screenshots below what they mean

"three dots menu" on the dashboard (see below red circled menu option in the attached image)

Image not found or type unknown



"hamburger menu" on the application (see below red circled menu option in the attached image)



Reminder Capabilities

Anytime you call an applicant and the applicant suggests you call back on a certain date, then the employee can add a reminder on that application. When that day arrives, the application will float to the top of your queue with a “bell/reminder” icon on it

To add a reminder, you can use either 1) the "three dots menu" on the dashboard or 2) the hamburger menu on the application page

Reminders or automatic follow-ups with applicants are also built into the system. These reminders go out to applicants that are not making progress - via email and sms. Your marketing team can work with CreditSnap team to activate these, or administer them under "Email & SMS Admin" from the admin options.

Assign an application to self or someone else

CreditSnap is designed to automate your applicaiton workflows. ONLY when an applicaiton needs to be updated, assign that applicaiton to self or someone else. If no changes needed, then always elect "No" when prompted at opening an application

1. **You can assign an application to yourself** in one of three ways - 1) the "three dots menu" on the dashboard next to the application (or) 2) the hamburger menu on the application page (or) 3) On edit of an application, if the applicaiton is not assigned to anyone yet, then a prompt will appear asking if you want to assign this to yourself. Click "Yes" to assign that applicaiton to yourself.
2. **You can assign an application to someone else** in one of two ways - 1) the "three dots menu" on the dashboard next to the application (or) 2) the hamburger menu on the application page.

Add Notes

CreditSnap automatically adds notes at every step of the way. To see the notes and event trail, edit applicaiton -> Click on "Events" option towards left bottom. In addition to these automatic notes, you may need to add adhoc notes on to the applicaiton after a customer conversation or after applicaiton review.

You can add notes to an applicaiton in one of two ways - 1) the "three dots menu" on the dashboard next to the application (or) 2) the hamburger menu on the application page.

Withdraw an application

When an applicant decides to not pursue an application further, you can "Withdraw" that applicaiton. To do so, use the hamburger menu on the application page and the **Withdraw** option there.

Note: When an application already exists for an applicant, and if they try to start another applicaiton of the same category, then the system will automatically channel them to the previously created applicaiton. If you are trying to allow the applicant to create a new applicaiton, then marking the old applicaiton "Withdrawn" will wllow the applicant ot create another applicaiton of the same category.

Lock an application

When you do not want anyone in your team to acidentally edit anything in an application (may be because you are already having a conversation with the applicant (or) because compliance or someone asked for that applicaiton to be untouched), you can use "Lock" option from the hamburger menu on application page

Note: Some applications - when complete or when funded - can enter into Lock state automatically.

Mark an application Complete

When an application is successfully booked, you can "Mark it Complete" from the hamburger menu on the application. While it is ont necessary to mark an applicaiton complete, some teams prefer to do so so that they know to not worry about them anymore

Send App Online

CreditSnap system is designed to automate the process for your applicants. But every now and then applicaitons need manual review. Once you complete your review, you do not need to send an email or call the cutsomer to let them know. To make it easy for you to make this communcation happen, always use "Send App Online" option from the hamburger menu on the application. Applicant will immediately receive an email and SMS with a deep link that they can use to directly go to the page where they need to continue.

This process is the same for every situation where you want the applicant to resume the application. These emails and sms carry common messaging like "Your applicaiton is ready for next steps" so that the experience of the applicant is standard and easy.

Queue Management

Queues are designed to a) categorize applications into manageable queues and b) to enable notificaiton when an application falls into a queue.

How to create a Queue: Queues can be created or edited from Gear Icon -> Lending Admin or Deposit Admin -> Queue Management. A queue can be created by selecting a set of statuses that you want to be a part of that queue. For example, if Funding team wants to see only those apps ready for Funding, then a "Funding Queue" can be created by selecting "eSignature Complete" status.

Who can be a part of the queue? Once a queue is created, employees can be associated to that queue. Once assigned, those employees can select the queue from "Filters" option at the top of the dashboard anytime.

Notifications: Queue can also enable notificaitons. When creating a queue, an optional "distribution email" can be attached to the queue. When an application falls into that queue, then an email notificaiton will be sent to that distribution email. In other words, you may not assign any employees to a queue, but decide to use queues because you want to use the email notifications functionality.

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