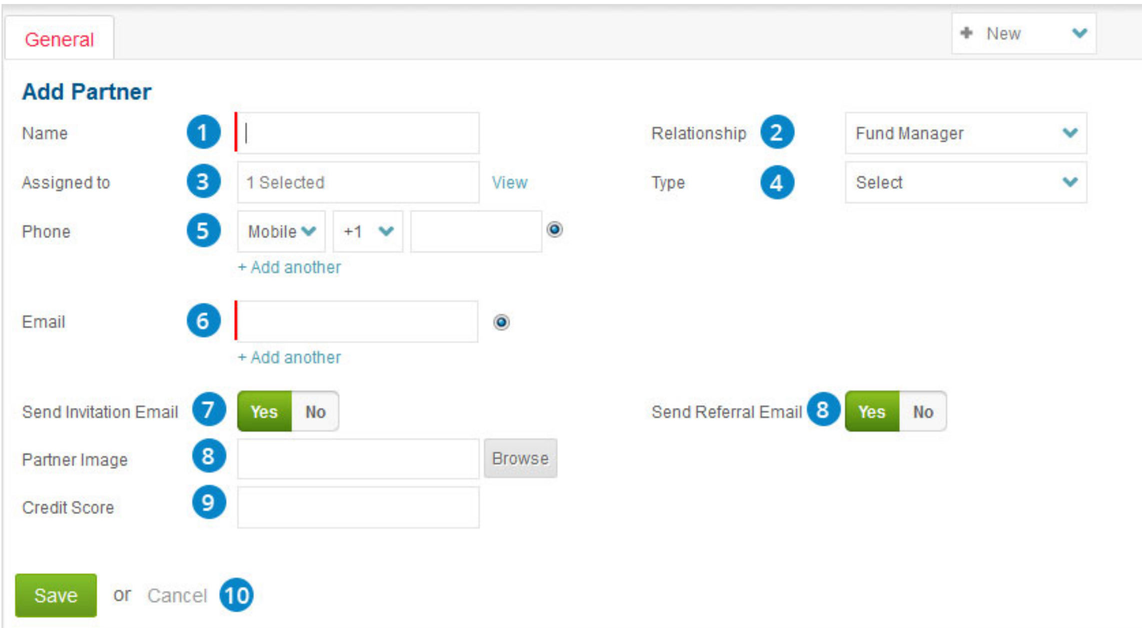
Add Partner

New partner can be added by clicking on Partner in the left panel or by clicking on + New button in the upper right corner of the partner listing page. Detailed information of the partner can be added through two different sub tabs (general and tags) which have their own corresponding fields.

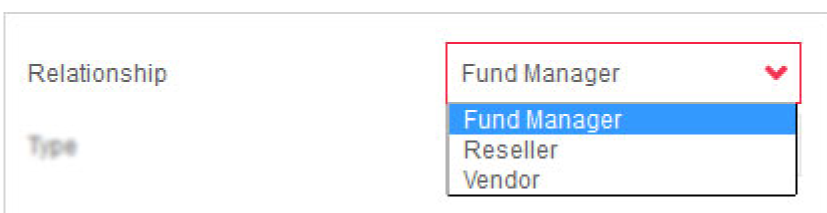


1

Type in the name of the partner (which is compulsory).

2

Choose the relationship from the drop down.

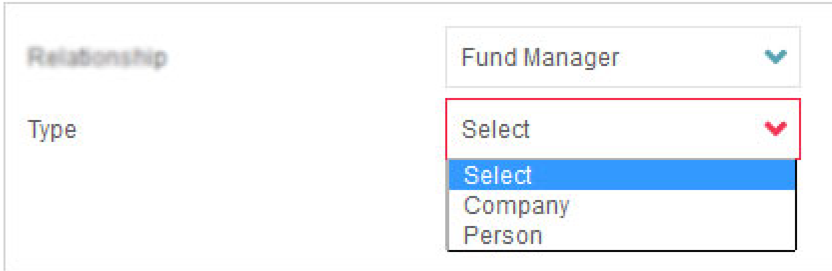


3

Choose Assigned type

4

Choose the type from the drop down.



5. Put in the phone number of the partner. You can add multiple phone numbers by clicking on + Add another link.

6. Type in the e-mail address (which is compulsory).

7. Click on Yes if would like your partner to receive an 'invitation email'. Or else click on No.

8. Upload the partner image. Click on Yes if would like your partner to receive a 'referral email'. Or else click on No.

9. Type Credit Score

10. Click on Save to update the information and move to the next tab.