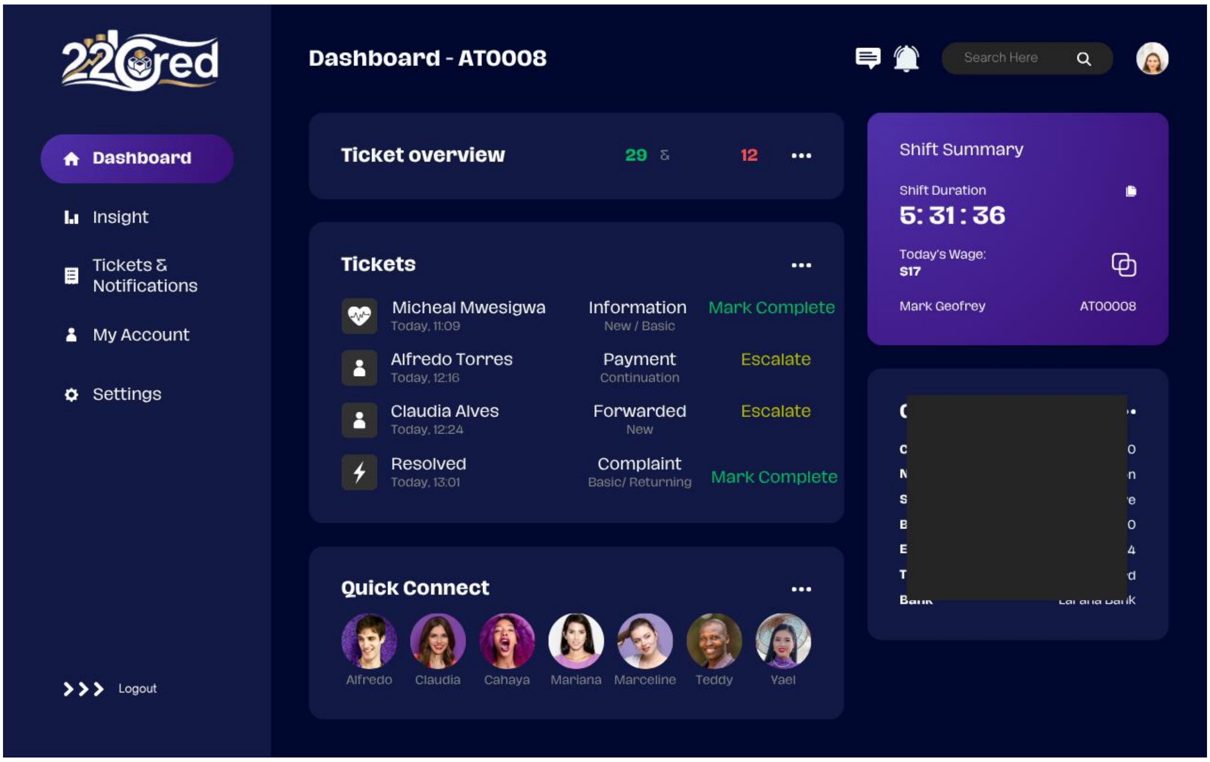
22Cred – Dashboard Overview (Quick Guide)

Welcome to the **22Cred Work Dashboard**.
This quick guide provides a clear, high-level overview of the dashboard and its key features.

Note: Screenshots in this guide are taken from the **laptop/desktop version**.
The mobile version is similar but more simplified.
A full, detailed walkthrough will be provided during **official training**.

Full Dashboard Preview



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1. Product Info

What you'll see:

- A summary of the **Credit policy** you are handling
  (e.g. Business Loans, Medical Loans, etc)
- Click to open the **full service/policy page**, which includes:
  - Common customer questions related to that service
  - Ready-to-use, compliant response templates
  - Regulatory and credit compliance guidance
  - The ability to add your own effective responses to help other agents

Switching Products:

- You may switch assigned service lines **up to 3 times per day**.

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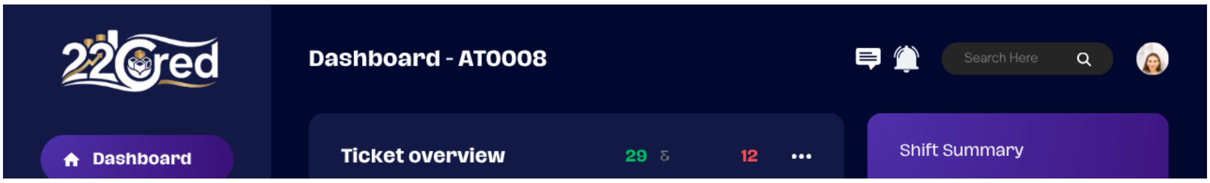
2. Dashboard Top Section

Located at the **top of your screen**.

Includes:

- **Agent Tag** – your unique identifier
- **Chat Icon** – message Admins or Team Leads
- **Notifications Icon** – announcements, updates, dashboard changes
- **Search Bar** – search tickets, service info, or dashboard features



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3. Ticket Summary

This section shows your **daily ticket activity**.

Colour Indicators:

- **Green** → Tickets received today
- **Red** → Tickets resolved/closed today

Escalated tickets are **not counted as resolved** until they are returned and closed by you.

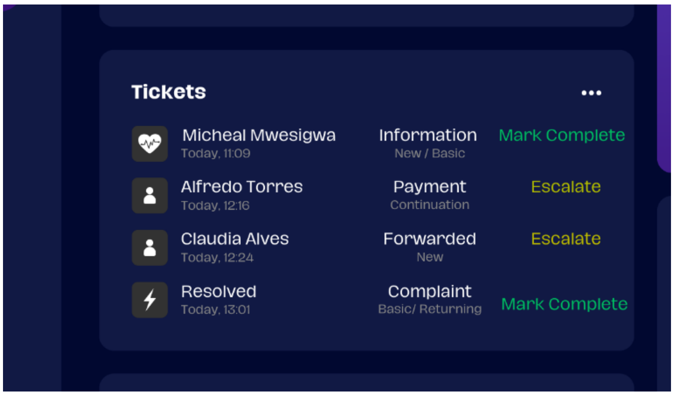
Below the counters, you'll see your 4 most recent tickets, including:

- Customer name / email

- Time opened
- Ticket type
  (Loan Status, Credit Delay, Account Issue, Address Update, Complaint, Claim)
- Tags *(New, Basic, Returning, Continuation – explained during training)*

After handling a ticket:

- Mark as **Complete**, or
- **Escalate** to Operations, Credit Review, Risk Assesment, or Management



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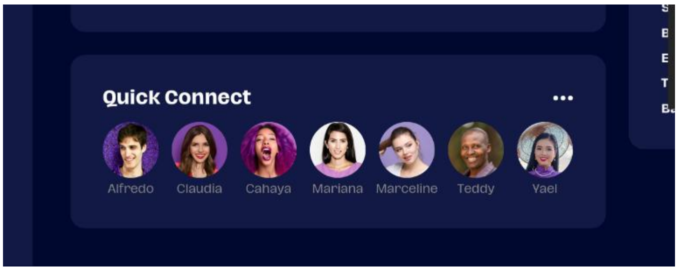
4. Quick Connect

Your **peer-to-peer support chat** for real-time collaboration.

You can:

- Communicate with agents on the same service line
- Ask operational or policy questions
- Respond to other agents
- Share compliant solutions
- Collaborate on complex cases



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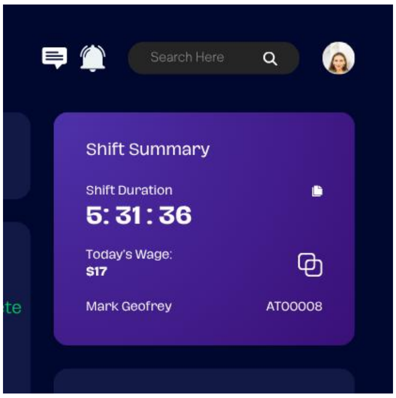
5. Shift Summary

Displays details about your current work session:

- Hours worked today
- Login time
- Earnings for the day

Clicking this section opens your **Earnings Page**, where you can view:

- Earnings for the current **2-week pay period**
- Monthly, quarterly, and yearly earnings
- Next pay date
- Option to update payment information
- Ability to raise payment-related queries



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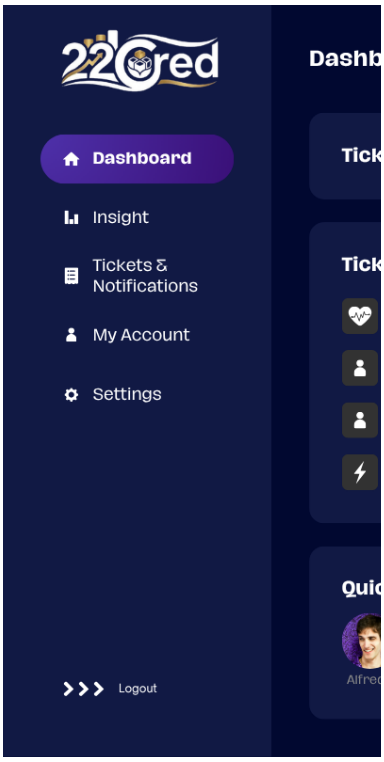
6. Menu Navigation

Located on the **left-hand side** of the dashboard.

From here, you can access:

- Product Info
- Tickets
- Quick Connect
- Earnings
- **Log Out** (located at the bottom)



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7. Basic Rules

- Do **not remain inactive for 30+ minutes**
  → Automatic logout + lost time tracking
- You **cannot log in outside your assigned shift**
- Never share login credentials
- Never share customer or company shipping, financial, or operational data outside the portal
  → **Immediate termination**
- Follow all additional rules explained during training

Final Note

This guide is intended as a **quick overview** only.
A **detailed training session and live dashboard demo** will be provided during your official onboarding with **22Cred (Canada)**.