

FINANCIAL SERVICES, REAL ESTATE

Industry Insider



See how our partner SharinPix tackles challenges in the real estate financial services industry. From big-picture problems to the specific needs of a loan servicing agent, SharinPix has it covered.

SharinPix makes it easy to gather, validate, transform, and package critical documents as PDFs without leaving Salesforce.



Here's how SharinPix helps lenders simplify the loan approval process.



Easily Gather and Transform

Provide your customers with a clear online form that lists all the documents they need to submit. Automatically transform scanned documents and images into PDFs.



Quickly Validate

Make initial document-level validations without leaving Salesforce. Categorize, edit, comment, mark up, and sign documents so they are ready for the next party to review.



Organize and Package

Automatically generate a PDF or zip file that meets the requirements of the department that will be using the information.



SharinPix can help a loan servicing agent cut down on back-and-forths and keep the loan approval process running smoothly.

The Solution

SharinPix helps you meet all your PDF management needs in Salesforce.

Collect scanned documents quickly and easily.

The Challenge: Customers don't always know what documentation is needed or how to submit the correct forms.

The Solution: The SharinPix PDF App allows loan agents to send out an online form, created in Salesforce, that lists the documents that need to be included or scanned in by the customer.

Validate scanned documents within Salesforce.

The Challenge: Documents needing review by multiple parties must be checked for accuracy. Reviewing documents manually outside Salesforce can be time-consuming.

The Solution: The SharinPix PDF App allows loan agents to identify missing documents, annotate documents that need to be revised, reorder and combine files into one PDF, and package it all into a zip file to share via Salesforce with the next reviewer.

Upload any size/format of PDF, scan, or image.

The Challenge: A loan servicer may get client photos in a format that can't be easily viewed in a browser. This can slow down operations.

The Solution: SharinPix lets users upload any size file, including PDFs, without restrictions. It also supports all image file types, including HEIC and RAW, so there's no need to worry about file upload errors.



The Scenario

In this example, let's imagine how a loan servicing agent can use SharinPix to help customers breeze through the loan approval process.

Monty Mortgage

Loan Servicing Agent

Monty uses Salesforce to manage loan applications. He wants to get customers through the process as quickly as possible, which can be difficult when dealing with lots of documents in different formats.

His Goals:

- Provide a smooth customer experience
- Gather, validate, and send required documents in a timely manner
- Improve workflows for all departments involved in the process

His Challenges:

- It's time-consuming to collect customer documents
- Customers often upload file formats that are difficult to work with like HEICs or very large TIFFs
- Opening and reviewing documents outside Salesforce adds unnecessary and complex steps



SharinPix solves Monty's challenges by helping him to:

Prevent missing documentation.

By providing customers with a simple form, Monty is able to collect the documents he needs faster.

Save time reviewing documents.

With the PDF App by SharinPix, Monty can check documents for accuracy, make comments, reorganize, and package them into a zip file to share with the next party, all right in Salesforce.

Avoid unreadable information.

With SharinPix, Monty can work with any PDF or image file format or size, without fear of traditional limitations. No upload errors, no blank screens due to unknown formats – SharinPix simplifies both the upload and reading of customer-provided information.

[Learn more about SharinPix](#)