

THE POWER OF SALESFORCE FOR THE LENDING INDUSTRY

ONE PLATFORM.
EVERYTHING YOU NEED.

FUNDINGO.

CLOSE MORE DEALS FASTER

Amplifying the power of the Salesforce.com platform, the World's #1 Customer Relations Management system, FUNDINGO provides the alternate lending industry with the tools they need to effortlessly manage their entire process, from Lead through Funding and beyond in one automated, easy-to-use system. Fundingo helps businesses grow and scale by providing cutting edge technology that results in quicker turnaround, higher quality service, and excellent customer experience.

OUR CLIENTS HAVE SEEN:

20%
increase
in lead conversions

25%
increase
in marketing ROI

30%
increase
in growth

ORIGINATION

Close more deals in less time with powerful integrations, automation, and tools designed to streamline the sales process.



SALES MANAGEMENT

Easily prioritize your pipeline with lead scoring and customizable rules



APPLICATION

Take applications from Merchants online and over the phone



SUBMISSION AUTOMATION

Find the right lenders for each merchant and submit with one click



LENDER APIs

Submit deals to lender portals directly from the CRM via API



OFFERS & CONTRACTS

Easily track approvals from various lenders and send out contracts electronically



COMMISSIONS MANAGEMENT

Simplify tracking of commission payables and receivables



RENEWALS MANAGEMENT

Easily identify and monitor deals that are eligible for renewal



WORKFLOW AUTOMATION

Powerful Workflow Rules to automate your sales process



REPORTS & DASHBOARDS

Build powerful, custom reports based on any data in your system



MOBILE

Manage your business on the go with Salesforce1 Mobile App

UNDERWRITING

Through simplified decisioning and offering process and powerful integrations with respected risk management tools, we make underwriting hassle free.



APPLICATION

Take applications from Merchants online and over the phone



VERIFICATIONS & STIPS

Dynamic checklists guide your team through the underwriting process



INTEGRATIONS

Powerful integrations with Experian, DecisionLogic, and many more



PRICING

Present offers through the dynamic pricing engine & ISO deal calculator



CONTRACTS

Generate contracts with the click of a button



MERCHANT INTERVIEW

Never miss important questions with the guided merchant interview



ISO MANAGEMENT

See which ISOs are bringing you the best deals



WORKFLOW AUTOMATION

Powerful Workflow Rules to automate your Underwriting process



REPORTS & DASHBOARDS

Build powerful, custom reports based on any data in your system



MOBILE

Manage your business on the go with Salesforce1 Mobile App

SERVICING

Easily track and monitor the repayment of loans and merchant cash advances directly within Salesforce. Automate recurring payments and manage performance, while easily tracking fees and identifying deals ready for renewal.



PORTFOLIO MANAGEMENT

Manage and analyze all loans directly within your CRM



ACH INTEGRATIONS

Schedule and track payments with your ACH processor



RENEWAL MANAGEMENT

Easily identify and monitor deals that are eligible for renewal



COLLECTIONS MANAGEMENT

Flag troubled accounts & track the collections process



MERCHANT STATEMENTS

Generate statements with the click of a button



REPORTS & DASHBOARDS

Build powerful, custom reports based on any data in your system



MOBILE

Manage your business on the go with Salesforce1 Mobile App



FEES AUTOMATION

Configure fees to be applied automatically and effortlessly



SYNDICATION MANAGEMENT

Track what's due to syndicators without complicated spreadsheets



PERFORMANCE ANALYSIS

Track deal pace percentage and static pool analysis

SCHEDULE A LIVE DEMO TODAY!

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