

SALESFORCE FOR LOAN MANAGEMENT SYSTEM



CHALLENGES

Requirement of a loan management system for their sales and customer service functions

A top residential solar lending and leasing company in the United States. They partner with a qualified network of regional solar installation specialists to facilitate the solar process for their customers.



SOLUTIONS & BUSINESS BENEFITS

Build Loan Origination with loan contract creation, loan disbursement, bill posting to custom objects for invoice generation, repayment, reversal and accounting processes

Data migration for their existing loan portfolio

Moved to an automated, seamless and efficient resulting in increased operational efficiencies and better customer satisfaction