

Industry: Financial/Lending Products Used: Sales Cloud Integration: Docusign,Ocrolus

A financial Company who is a provider of financial services and offers funding, pre-approved and business loan, cash advance, alternative lending, and traditional banking services.

Challenges

Prospect/Customer needed a single system/application for Lending industry which can

- Enable Loan "Origination" process
- > Track the prospect merchant and collect all relevant information including documents
- Screening of Merchants through "Under Writing" process
- > Collaborating with Syndicators for Funding for the deal
- > Initiating funding process with Merchant as well as pay back to Syndicators
- Tracking of all the payments
- > Missing 360-degree view as well as analytics of their customers
- > Calculating all commissions and providing a dashboard for the same.

Solution

- Solution was designed into multiple stages (Origination, Underwriting, Syndication, etc.) with various custom reports/dashboards
- Stages are defined and each stage define the process of execution i.e., Background Verification, Merchant info, Bank Account, Loan Offered, etc.
- Collecting Merchant information and customized the application to reflect the business process proceedings
- Solution was designed with various Reports/Dashboards
- > Stages are defined and each stage define the process for execution.
- Responsive customization to meet industry and company-specific requirements in term of processes and data capturing.

<u>Result</u>

- > Easy access to all the data from any location via a developed user's Interface.
- > Information is accurate, up-to-date and Real-Time.
- Eliminating management oversight of tracking the Stages as each stage corresponds to specific output
- Customization to meet industry and customer-specific requirements in term of processes and data capturing.
- > Complete 360-degree information for the Customers and their payment status

Process–Snapshot (Capturing Information to Lending Services)

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