

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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SYNDICATION DEAL Lendsuite Servicing Demo 😬 Opportunity Advance Details LEGAL NAME ADVANCE AMOUNT 1000.00 DBA FACTOR 1.2000 CREDIT SCORE PAYBACK AMOUNT 1200.00 YEARS IN BUSINESS PAYMENT INSTALLMENT 20.00 TOTAL PAYMENTS (LOAN TERMS) 3.00 AVG. DAILY BANK BALANCE COMMISSION INPUT Commission % ~ COMMISSION % 10.00 8 COMMISSION AMOUNT 0.00 Sample Syndications % SYNDICATION SYNDICATION AMOUNT AMOUNT TO SEND PAYBACK RTR FACTOR COMMISSION % COMMISSION \$ MANAGEMENT FEE % MANAGEMENT FEE \$ \$10.00 1.000% \$10.00 \$12.00 \$12.00 1.200 0.00% \$0.00 0.00% \$0.00 5.000% \$50.00 \$50.00 \$60.00 \$60.00 1.200 0.00% \$0.00 0.00% \$0.00 25.000% \$250.00 \$250.00 \$300.00 \$300.00 1.200 0.00% \$0.00 0.00% \$0.00 Syndication ACTION SYNDICATOR ACCOUNT % SYNDICATION SYNDICATION \$ AMOUNT TO SEND PAYBACK RTR FACTOR COMMISSION % COMMISSION \$ MANAGEMENT FEE % MANAGEMENT FEE \$ Leumi Primary Del 20.000 200.00 \$218.00 \$240.00 \$240.00 1.200 9.00 \$18.00 0.00 \$0.00 Del Leumi Syndicat 30.000 300.00 \$342.00 14.00 2.00 \$7.20 \$360.00 \$352.80 1.200 \$42.00 Leumi Syndicat \$18.00 Del 50.000 500.00 \$540.00 \$600.00 \$582.00 1.200 8.00 \$40.00 3.00 Save

Loan Lendsuite Servicing Demo

RS- 00633 Status Active Total Payback Amount \$1,200.00 Total Payment Amount \$1,200.00 Payment Method ACH PayOff Image 12% Payment Amount \$20.00 DATE AMOUNT BALANCE STATUS 09/15/21 20.00 1160.00 Pending 10/15/21 1140.00 20.00 Pending 11/15/21 20.00 1120.00 Pending 12/15/21 20.00 1100.00 Pending 01/17/22 1080.00 20.00 Pending 02/15/22 20.00 1060.00 Pending 03/15/22 1040.00 20.00 Pending 04/15/22 20.00 1020.00 Pending 05/16/22 20.00 1000.00 Pending 06/15/22 20.00 980.00 Pending 07/15/22 20.00 960.00 Pending 08/15/22 20.00 940.00 Pending

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