

## Salesforce CRM

# Loan Origination Solution Accelerator

If you are a Financial Services Company interested in a CRM and Loan Origination solution for ...

Solution specific to Financial Services for  
Loan Origination & Customer Onboarding  
Short timeframe to Go-Live  
Quick User Adoption  
Faster Realization of benefits  
Speed to Market

You should consider Process360's Loan Origination Solution Accelerator



### Solution Details

Lead Management & Qualification  
Loan Application Processing for Personal, Home, Vehicle & Business Loans  
Customer Profile, KYC & On-boarding  
Credit Verification & Approvals  
Generate Offers / Quotes  
Maintain Loan Agreements  
Disbursements & Amortization Schedules  
Track and Record EMI Payments  
Alerts for overdue EMI payments  
Execute Campaigns to target prospective clients  
Track Customer Service Requests

### Features / Benefits

Built on Salesforce Sales Cloud CRM solution  
Pre-built solution for LOS / KYC  
Customizable to customer business  
  
Dashboard Reports for Insights & Decisions  
  
Short implementation time-frame  
Faster ROI on License utilization  
No upfront infrastructure investment  
  
Extend solution with new modules / features

*The LOS CRM Accelerator helps Financial Services companies manage complete Sales cycle from executing marketing campaigns, lead sourcing, lead qualification to loan application processing, customer on-boarding, KYC and document collection, credit checks, approvals, generating offers, disbursements, managing loan agreements, generating amortization schedules, tracking payments and addressing customer services requests.*

*The solution framework helps Financial Services companies manage complete loan processing and have a 360-degree view of their customers. The solution supports integrations with internal financial systems, external government and 3<sup>rd</sup> party credit agencies to check credit ratings and conduct credit checks on customers.*

*The solution can also be extended to financial services companies offering broad range of products like advisory, portfolio management, mutual funds to leverage the available lead management, application processing, customer verification, customer on-boarding and KYC processes.*

If you would like to understand further details and discuss the Real Estate CRM Accelerator, Please contact [will.sturt@processthreesixty.com](mailto:will.sturt@processthreesixty.com) or visit <https://www.processthreesixty.com/fins-loan-origination-solution-los/>