



CLIENT PROFILE



NYMT is an internally managed real estate investment trust delivering stable distributions over diverse economic conditions

INDUSTRY

Financial Services

PRODUCTS

AppBuilder, Integration Services, JavaScript Designer, Platform, Process Automation, Security & Privacy, Sales Cloud

SERVICES

Product Implementation



Jeffery Kupski, Assistant Vice President



<https://www.nymtrust.com/>

WHAT THEY NEEDED

New York Mortgage and Trust operates in the complex financial space coordinating large real estate deals. The nature of this industry is that many people, both internal and external, are required to proceed through a complicated due diligence process, ensuring all t's are crossed, and i's are dotted, prior to executing on a new property. In order to streamline this process, NYMT sought a way to more easily communicate and involve their external parties throughout the Opportunity process, giving them visibility into Diligence items, and provide these people with easier tools for uploading important documentation. Further, given that this process revolves around this documentation, usually in the form of files with different revision processes, they wanted to ensure that this portal allowed for centralized file storage in a location that met internal accessibility, visibility, and security policies.

HOW WE SOLVD IT

SOLVD's technical architects designed a solution leveraging a Partner Experience Cloud site, custom UI components, a complex permissioning structure, and a custom SharePoint integration which allowed for the pixel-perfect user experience that NYMT desired. The Experience Cloud Site provided the visibility into Opportunities for external parties, while the automation and integration supporting the site allowed for file versioning and storage in SharePoint. SOLVD partnered closely with the incredibly talented team at NYMT to divide and execute this complex design, allowing for parallelized building and resource management.

WHAT THEY SAID

"We engaged SOLVD for a custom portal and file management system. From the start of project scoping, SOLVD was professional, concise, and highly knowledgeable about the Salesforce platform. We spent considerable time scoping the project so that the build process would run smoothly. By taking the time upfront, we were able to finish the project on time and within budget. Throughout the project, the SOLVD team kept us on task through an extensive project management tool. On our weekly calls, we were able to communicate the changes over the week and push the project forward. I cannot stress enough how highly I recommend SOLVD for any of our Salesforce projects." -Jeffery Kupski, Assistant Vice President

