

Redefining Regents Capital's Equipment Financing & Leasing business with Salesforce.

Key Objectives:

- Complex & critical financial business processes made legacy Salesforce Classic interface insufficient for effective usage.
- Need for early-stage application vetting to facilitate credible underwriting checks and help capture potential non-performing accounts early in the stage.
- Create tailored user experiences for different departments, ensuring restricted data access.
- Streamline partner onboarding process, reduce human involvement & steps.
- Enhancing Partner/Vendor experience across platforms.



Regents Capital Corporation, incorporated in 2013 & based out of CA, USA is a financial services company delivering full line of commercial equipment financing products to middle-market clients nationwide.



Success Story – Equipment Financing & Leasing

Solutions Highlights:

- Created intuitive Lightning App with UI Components for various business workflows for deal closures such as document collection, credit analysis, etc.
- Extracted data from Experian Commercial & Paynet Credit Reports to help assessors with Credit Decisioning.
- Allowed vendors to raise a financing request to Regents Capital on behalf of the purchaser, check quotations, and follow up on the application.
- Automated Final Disclosure Process to generate agreements in minutes, to comply with laws requiring Financial Disclosure agreements to be signed before funding.
- Devised a self-serve Partner Portal for lead capturing by equipment vendors. Enabled partners to engage with Regents using this Vendor Portal as the single point-of-contact.

Value Delivered:

- Migration to Salesforce Lightning resulted in productivity improvement and seamless viewing of complex data.
- Apps customized for different departments provided useful data visibility and workflows pertinent to the user.
- Automated Credit Reports enabled assessors make quick decisions, saving time.
- Experience Cloud based Vendor Portal enabled smooth Regents–Vendor interactions.



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Tel : +61-2-8015-5723



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