

Building an Application on Salesforce Platform for a **US based FinTech**



Our Client is the leading FinTech marketplace offering small business loans and services. They've secured over \$1 billion in financing for small business owners to date. They've expert Business Financing Advisors work within 75+ Lender Marketplace in real time to give easy access to the best low-interest SBA loans, short and long-term loans and business lines of credit, as well as a full suite of revenue-driving business services.

What bothered them

- They brought SF licenses with an idea to improve the internal processes, however it was not being used effectively.
- Interested customer from all over USA registering for product from their website became messy to handle large amount of data.
- Data was getting scattered all over and it was finding difficult for employees to work and give required information on selected product.
- Finally creating reports and dashboards were not showing correct figures since complete data was not captured in the system.

What we did

- Aress sent one Business Analyst at client site to analyze the process and the pain areas for all the stakeholders.
 - After understanding the requirements in detail, we suggested bespoke development on Salesforce's Force.com platform.
 - We built –
 - Commissions Calculator,
 - Sales Rotation for Leads,
 - Lender API integrations,
 - Client Biz information,
 - Opportunity Grid,
 - Package setup for Website Integration,
 - Partner Community for Agent/brokers,
 - Partner portal integration
 - Provided business logic that would process all core functionality of
 - Customer allocation for their Employees to work on it.
- The entire implementation process was conducted in an Iterative and Agile execution method. There were intermediate checkpoints thru show and tell sessions, to capture user feedback.




Client Biz Info FFI Docusign Enter App


Save


Cancel


BUSINESS INFORMATION

* Account Name	DBA	Entity Type	Industry	Copy Business Address to Mailing Address
<input type="text"/>	<input type="text"/>	<input type="text"/>	Transportation	<input type="checkbox"/>
Billing Street	Billing City	Billing State/Province	Business Zip/Postal Code	
<input type="text"/>	Carrollton	TX	75010	
Mailing Street	Shipping City	Mailing State/Province	Mailing Zip/Postal Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Phone	Fax	Website	Fed Tax ID# (XX-XXXXXXX)	Business Start Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	9/8/2020 

+ OWNER/OFFICER INFORMATION

First Name	Last Name	Social Security Number	Birthdate
<input type="text"/>	<input type="text"/>	<input type="text"/>	1/25/1994 
Home Street Address	Home City	Home State/Province	Home Zip
<input type="text"/>	Carrollton	TX	75010
Home Phone	Mobile Phone	Email	% Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

 Phone

 Chatter Feed



Details Chatter Oculus Activity SMS **API's**

TBB OnDeck Forward Financing **Everest** Bitty ByzFunder Kapitus Credibly Idea Expansion Capital Fora

Create Lead

Auto Populate

Fill the lead information

* Legal Name

* DBA Name

* Fein

* Business Phone

Company State

* Owner SSN

* Owner First Name

* Owner Last Name

* Owner Birthdate

* Owner Address

File section :

Generate Lead

Phone Chatter Feed



<div> Submission (11) Offer (1) Stips (2) Open Balance (1) Bank Statement (3) Merchant Statement (0) File (14) </div> <div> New submission Lender Tier Save Edit All Refresh Cancel </div>										
Action	Lender	Auto F/U Time	Date Submitted	Status	Status date	Highest Funding \$	Longest Term	Last Follow Up	Deal Type	Submission Notes
Del View			Aug 4, 2021	Approved	Aug 5, 2021	\$37,000	8		New	App 3 banks
Del View			Aug 4, 2021	Approved	Aug 5, 2021	\$35,000	7		New	App 3 banks
Del View			Aug 4, 2021	Approved	Aug 4, 2021	\$31,900	7		New	App 3 banks
Del View			Aug 4, 2021	Submitted to Lender	Aug 4, 2021				New	App 3 banks
Del View			Aug 4, 2021	Declined	Aug 4, 2021				New	App 3 banks, req 40k 24 months, funds for eqpt
Del View			Aug 4, 2021	Declined	Aug 4, 2021				New	App 3 banks
Del View			Aug 4, 2021	Declined	Aug 4, 2021				New	App 3 banks, req 40k
Del View			Aug 4, 2021	Declined	Aug 4, 2021				New	App 3 banks
Del View			Aug 4, 2021	Declined	Aug 4, 2021				New	App 3 banks, req 40k, funds for eqpt
Del View			Aug 4, 2021	Declined	Aug 4, 2021				New	App 3 banks, req 40k
Del View			Aug 4, 2021	Declined	Aug 4, 2021				New	App 3 banks, req 40k

Phone
Chatter Feed



SALES ROTATION

STATUS UPDATES

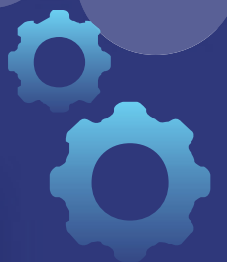
ASSIGNMENT HISTORY

AddRemoveRefresh

	Name	Status	Counter
NB \$10K-\$29K	<input type="checkbox"/>		0
NB \$30K-\$74K	<input type="checkbox"/>		1
NB \$75K-\$149K	<input type="checkbox"/>	Out For the Day	0
NB \$150K-\$249K	<input type="checkbox"/>	Out For the Day	0
NB \$250K -\$499k			
NB \$500k - \$999k			
NB \$1 Million +			

Phone

Chatter Feed




[New Contact](#)
[Edit](#)
[New Note](#)


Related **Details**

Commission Name		Opportunity/Legal Name	
Opportunity		Gross Points from Lender	10.00%
Deal Defaulted Checkbox		Date of Funding	11/12/2021
Clawback Date		Opportunity Owner/Account Executive:	
Lender		Referral Partner	
Lender (Name)		Final Payback Amount	\$5,219.90
RP Referral Revenue Share	0.00%	Final Advance Amount	\$3,500
Net Points	9.0000%	Expected BCI	\$315.00
Revenue Share	0.00%	Net Amount	\$0.00
\$ to RP	\$0.00	Date Comp Received	11/15/2021
Waive 1% House Fee	<input type="checkbox"/>	Uncollectable Fee Checkbox	<input type="checkbox"/>
Strategic Account Manager		RP Comp Paid	

Phone

Chatter Feed



Search...

☆

+

?

Home Leads

Home

Chatter

Leads

Contacts

Accounts

Opportunities

Reports

Dashboards

Offers

Packages

Configurations

Commissions

More

Package

a044W00000qUJzf

Doc Request Email

New Contact

New Note

Related

Details

Package Name

a044W00000qUJzf

Intended Use of Financing

Package old org ID

LeadId

Package manually created

☐

O1 Address

O2 Last Name

O2 Full Name

O2 First Name

Question 1

Question 2

Question 3

SBA-EIDL-Details

Question 7

Owner

Package ID

a044W00000qUJzf

opportunityId

Address

Affiliate4Relationship

AVG Monthly Payroll

2.5

Approval Code

Mobile phone

Monthly Payment:(If rented or Mortgage)

Years in Business (Website)

Website

Zip (Home)

Zip (Business Owner Home)

Zip (Business Mailin)

Activity

Log a Call

Email

New Task

New Event

Recap your call...

Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Phone

Chatter Feed



Value we offered...

- Simple interface made for all different types of users who could use the system more efficiently. This resulted into faster operation, lesser challenge in allocating a customer arriving through other integrated lender APIs into Salesforce.
- When Customers from other web end arrive in Salesforce then by its City and Zip code, they get sorted according to their Branches allocated near to their address.
- Hence the customer allocated to Employee according to their product information gets detail information and according to their disposition interest we consider them as Opportunity.
- Also, Marketing Campaigns overall budget also gets calculated.
- Modern but practical analytics were built using Salesforce's native reports and dashboards. This helped the Management/C-Level and Managers gets clear visibility of Customers Interest with their product and overall estimated budgets of Campaign.

