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.

OST
Technologies

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.

OST Technologies

Save   Cancel

BUSINESS INFORMATION

* Account Name	DBA	Entity Type	Industry	Copy Business Address to Mailing Address
			Transportation	

Billing Street	Billing City	Billing State/Province	Business Zip/Postal Code
	Carrollton	TX	75010

Mailing Street	Shipping City	Mailing State/Province	Mailing Zip/Postal Code

Phone	Fax	Website	Fed Tax ID# (XX-XXXXXXX)	Business Start Date
9/8/2020				9/8/2020

+ OWNER/OFFICER INFORMATION

First Name	Last Name	Social Security Number	Birthdate
			1/25/1994

Home Street Address	Home City	Home State/Province	Home Zip
	Carrollton	TX	75010

Home Phone	Mobile Phone	Email	% Ownership

📞 Phone   ⚡ Chatter Feed

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

* Onwer Birthdate

* Owner Address

File section :

Generate Lead

Phone   Chatter Feed

Submission (11) | Offer (1) | Stips (2) | Open Balance (1) | Bank Statement (3) | Merchant Statement (0) | File (14)

New submission | Lender Tier | Save | Edit All | Refresh | Cancel

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

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	☐	Uncollectable Fee Checkbox	☐ ✎
Strategic Account Manager		RP Comp Paid	✎

📞 Phone   ⚡ Chatter Feed

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 ✎	Owner	👤
Intended Use of Financing	✎	Package ID	a044W00000qUJzf
Package old org ID	✎	opportunityId	✎
LeadId	✎	Address	✎
Package manually created	☐ ✎	Affiliate4Relationship	✎
O1 Address	✎	AVG Monthly Payroll 2.5	✎
O2 Last Name	✎	Approval Code	✎
O2 Full Name		Mobile phone	✎
O2 First Name		Monthly Payment:(If rented or Mortgage)	✎
Question 1	✎	Years in Business (Website)	✎
Question 2	✎	Website	✎
Question 3	✎	Zip (Home)	✎
SBA-EIDL-Details	✎	Zip (Business Owner Home)	✎
Question 7	✎	Zip (Business Mailing)	✎

📞 Phone   ⚡ Chatter Feed

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.

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.