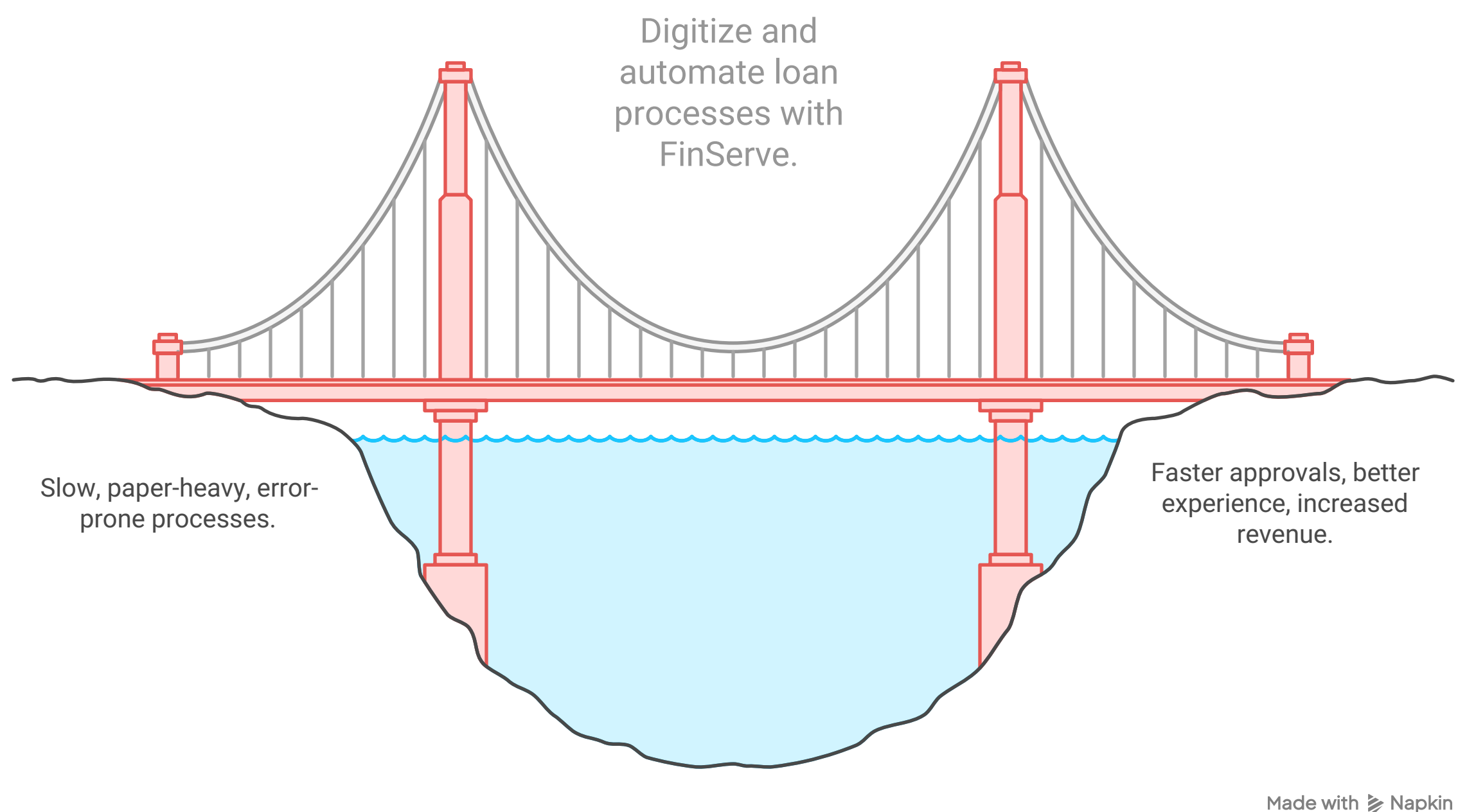


FinServe – Loan Origination & Customer Support Portal

Overview

Our project focuses on transforming the loan management process in the banking and financial sector. Traditional loan processing is slow, paper-heavy, and error-prone — leading to delays, poor customer experience, and revenue loss. FinServe is a Salesforce -based solution designed to digitize and automate loan origination, approval workflows, KYC verification, EMI reminders, and customer support, while providing real-time dashboards for management .

FinServe transforms loan management for banks.

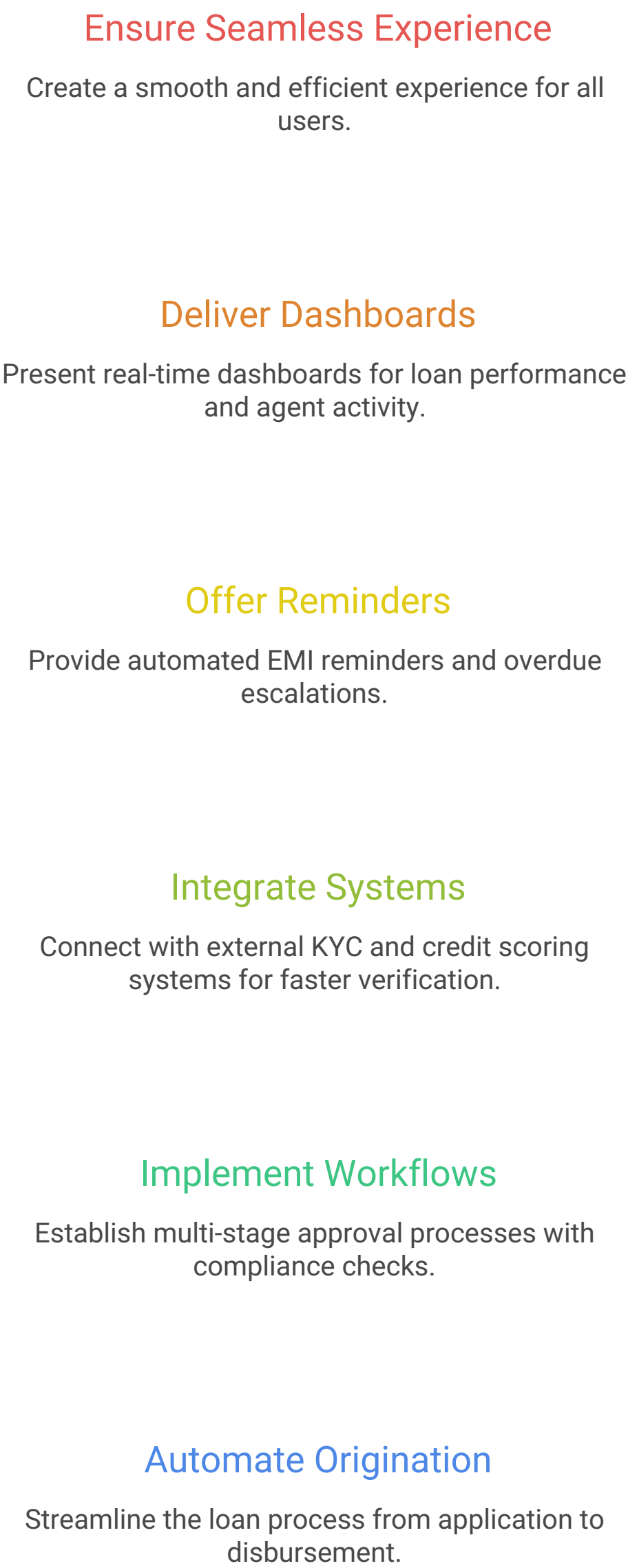


What Makes Our Project Special

Most existing systems only track applications or send reminders. FinServe goes further by:

- Automating end-to-end loan origination (application to disbursement).
- Providing multi-stage approval workflows with built-in compliance checks.
- Integrating with external KYC/credit scoring systems for faster verification.
- Offering automated EMI reminders and overdue escalations.
- Delivering real-time dashboards for loan performance and agent activity.
- Ensuring a seamless experience for customers, loan officers, and managers.

Achieving Seamless Loan Origination



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Technologies We Are Using Platform – – Salesforce CRM

- Standard & Custom Objects for Loans, Applications, Customers.
- Process Automation with Flows, Approvals, and Apex.
- Lightning Web Components [LWC] for customer portals.

Integration

- External APIs for KYC and credit score checks.
- SMS/Email services for EMI reminders and customer updates.

Data Tools

- Salesforce Reports & Dashboards for analytics.
- Data Loader for bulk import/export.

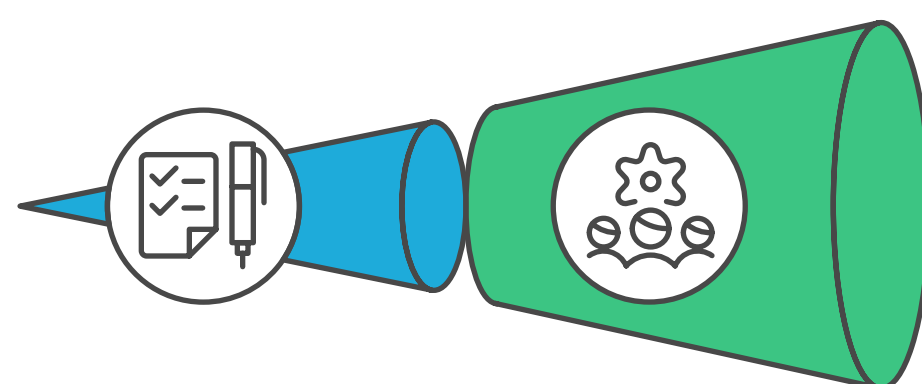
Programming – Apex & LWC

- Apex classes, triggers, and asynchronous processes for loan workflows.
- LWC for responsive customer and officer interfaces.

Architectural Flow

1. Input Layer [Loan Application Intake]
 - Customer submits loan application via web form/portal.
 - Salesforce auto -creates a Lead/Application record.

Loan Application Process Funnel



Application Received

System acknowledges application submission

Record Created

Salesforce generates Lead/Application record

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2. Processing Layer

- Approval workflows route applications to Loan Officers → RMs → Credit Managers.
- KYC Verification integrates with external APIs.
- Salesforce automation tracks required documents and status.

3. Loan Management Layer

- Once approved, Opportunity is converted to Loan Record.
- EMI schedules generated and reminders automated .

4. Customer Support Layer

- Customers receive updates via SMS/Email.
- Cases created automatically for overdue EMIs or service requests.

5. Analytics Layer [Dashboards & Reports]

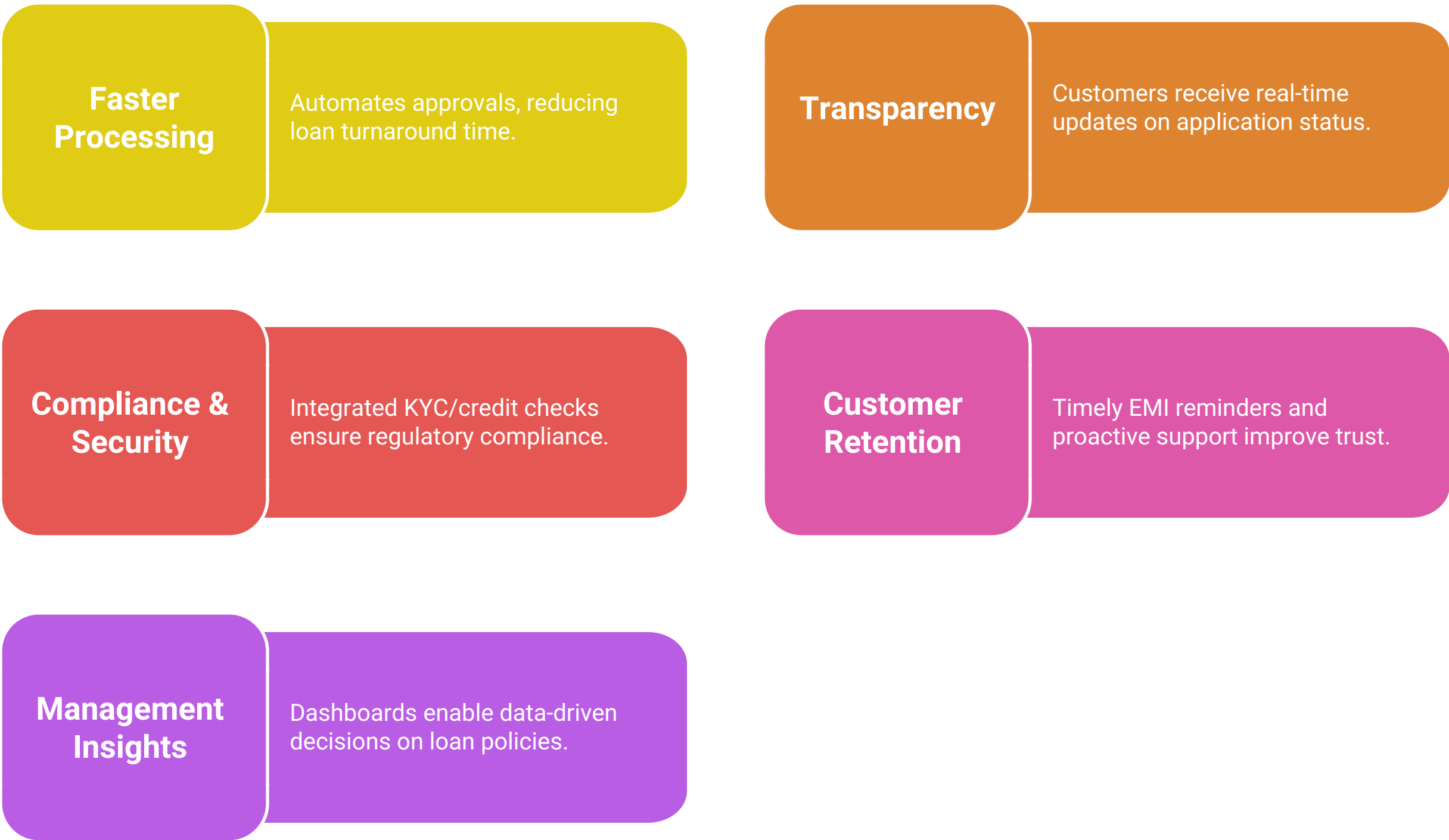
- Tracks loan volumes, approval timelines, default rates.
- Monitors agent performance and customer satisfaction.

How This Solves the Challenge

- ✓ Faster Processing – Automates approvals, reducing loan turnaround time.
- ✓ Transparency – Customers receive real -time updates on application status.

- ✓ **Compliance & Security** – Integrated KYC/credit checks ensure regulatory compliance.
- ✓ **Customer Retention** – Timely EMI reminders and proactive support improve trust.
- ✓ **Management Insights** – Dashboards enable data-driven decisions on loan policies.

Loan Processing Benefits



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Long-Term Vision

The vision of FinServe is to build a fully digital Banking-as-a-Service (BaaS) layer on Salesforce that can be scaled to multiple financial products — from personal loans and credit cards to mortgages and corporate financing. By integrating AI for risk scoring and predictive analytics, FinServe can become a next-gen intelligent financial CRM platform.

What Sets Us Apart from Existing Solutions

- ✓ **End-to-end automation** (application, KYC, EMI, support) in a single platform.
- ✓ **Built natively on Salesforce** for scalability and security.
- ✓ **Real-time dashboards** that track both customer activity and internal performance.
- ✓ **Customizable workflows** for different loan types and approval hierarchies.
- ✓ **Omni-channel communication** (web, mobile, email, SMS).