

## Product Spotlight: **Submission Wizard**

Work smarter, not harder. Sage advice passed down through time, but often easier said than done. In the Alternative Lending industry, one form of working smarter means selectively tailoring your deal submissions towards the most appropriate funding partners.

Take it from the chairman of the business financing company RapidAvance, Jeremy Brown, [who was asked in an interview](#) **“Do you have any advice for brokers working in the industry?”**

*“One thing I’ll say is that brokers have gotten a lot smarter over the last couple of years. I give them a lot credit in terms of figuring out what their niche is, what they’re good at and what the marketplace is.*

*I think the first thing, which many of them do already, is get to know the lenders really well – so that they can tailor what they submit to each funding company appropriately. Secondly, and again, a lot of brokers do a great job with this, know who the client is or who the customer is that you’re sending to a funding company to make an offer.*

*Because the more **targeted** that is, the more **efficient** we can be in providing the right types of offers back to the broker so that they can present the right offers to their customers.” - Jeremy Brown*

Knowing the characteristics/needs of clients, customers, lenders and funders: working smarter means knowing these essential details, and being able to take them all into account when submitting deals. But is there an easy way to

## The FUNDINGO Submission Wizard

The FUNDINGO Origination module includes a custom Submission Wizard built specifically for the Alternative Lending industry. The Submission Wizard allows you to submit a deal with open Stips and relevant Attachments to multiple banks at once, streamlining what is normally a heavily manual process. With just a few clicks, you can submit the right offers to the right funding partners.

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**Deal Summary**

Account ID	test	Amount Requested	\$45,000.00	Owner 1 Credit Score	560	Years in Business	5.00
Gross Monthly Sales	\$35,000.00	# Deposits	12	Average Daily Balance	\$25,000.00	# NSF's	
# NDB's		Name	test - 12/6/2016 - 1	Submission Notes		Term Requested	12.00

**Programs**

Credit Score	Years in Business	Monthly Deposits \$	Monthly Deposits #	Avg Daily Balance	NSF's	NDB's	Industry	State	Preferred Programs
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Bank	Program	Submission Method	Credit Score	Years in Biz	\$ Deposits	# Deposits	Avg Daily Balance	Max NSF's	Max NDB's	Max Amount	Commission %	Potential Funding Amt.	Matching % ▼	
<input type="checkbox"/>	ABC Pizza	TestProgram	<input type="text" value="Email"/>	<span style="color: green;">✔</span> 500	<span style="color: red;">⚠</span>	<span style="color: green;">✔</span> \$5	<span style="color: green;">✔</span> 5.00	<span style="color: green;">✔</span> \$20,000	<span style="color: red;">⚠</span> 5	<span style="color: red;">⚠</span>		20.00%	\$0	<div style="width: 50%; height: 10px; background: linear-gradient(to right, green, yellow);"></div> 50%
<input type="checkbox"/>		TestProgram11	<input type="text" value="Email"/>	<span style="color: green;">✔</span> 400	<span style="color: red;">⚠</span>	<span style="color: green;">✔</span> \$5	<span style="color: green;">✔</span> 2.00	<span style="color: green;">✔</span> \$1,000	<span style="color: red;">⚠</span> 10	<span style="color: red;">⚠</span>		10.00%	\$0	<div style="width: 50%; height: 10px; background: linear-gradient(to right, green, yellow);"></div> 50%

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**Attachments**


Drop files to attach

Record	Action	Name	Description	Programs
<input type="checkbox"/>				

No attachments present for this Opportunity.

### The FUNDINGO Submission Wizard

The Wizard allows you to view information related to the deal and apply **targeted** filters to determine the best programs offered by the banks that you work with. You can then select the appropriate banks and indicate which banks should receive the uploaded attachments and



offers. You can also upload Attachments to the deal directly through the Submission Wizard by utilizing a simple Drag and Drop interface.

The wizard can also be customized to work specifically with any available Programs and Banks.

## Results Delivered

Getting to know your funding partners takes time. Their preferences, portfolio, and tendencies won't come overnight. However, once you know who your partners are and how to tailor your deals with them, the FUNDINGO Submission Wizard does the rest. Gone are the days of lengthy manual processes. Sophisticated automation does the heavy lifting, allowing you submit smart, targeted deals with just a **couple of clicks**.

Take advantage of your hard won market and client knowledge Don't waste your time submitting deals to partners who will have little interest in saying yes. Smart & efficient business comes from creating the right types of offers and making targeted submissions. The FUNDINGO Submission Wizard's streamlined interface and automation is built to do just that. As for our customers? They are seeing big increases in both efficiency and deal success rates: and they are LOVING it!

### Interested in learning more?

Visit our website, [www.fundinggo.com](http://www.fundinggo.com), to see what FUNDINGO can do for you.

Have specific questions or want to talk to a FUNDINGO consulting expert?

Contact us at [info@fundinggo.com](mailto:info@fundinggo.com)