WESTWOOD FUNDING – LEADS TO SALESFORCE AUTOMATION

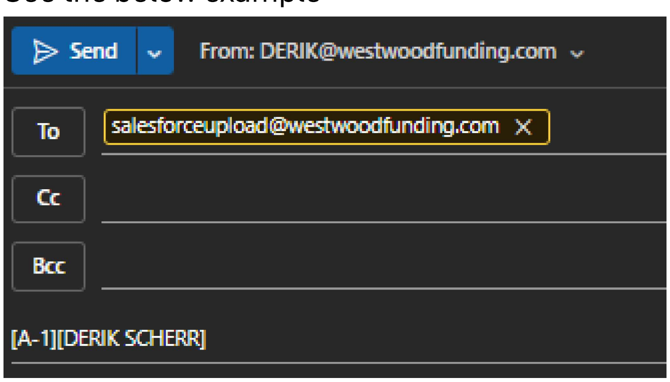
This document includes Step-by-Step instructions on how to get your file into Salesforce through our automated process. Included at the bottom of the document will be a FAQ section. Should you have any further questions, please contact your team leader.

1. FILES
   The first step is to make sure you have an application and bank statements to upload. These files should be in PDF format and the total file size across all documents should not exceed 30mb. If you have additional files, like secondary accounts, tax returns, or financials that are too large to upload all at once, please wait until the record is created in Salesforce to upload them manually.

   Any files that are too compressed, poorly scanned, or are fraudulent may not be uploaded.

2. EMAIL THE FILES
   The next step is sending the file into the system. You will need to format your email correctly for the record to be generated with the correct Lead Source and Ownership. It is important that the Lead Source matches exactly how it appears in Salesforce.

   The email should be formatted as follows:
   TO: salesforceupload@westwoodfunding.com
   SUBJECT: [LEAD SOURCE][DEAL OWNER'S FULL NAME]
   See the below example –



3. REVIEW THE SALESFORCE ENTRY
   It can take between 3-10 minutes to populate in Salesforce on average. If you have uploaded bank statements with multiple accounts and/or many transactions, this may take additional time to process.

   There are several key areas to review upon upload.

   - Review all the files to ensure that everything went though. The bank statements will be renamed for you automatically, but you may need to rename the original APPLICATION to DO NOT SUBMIT depending on the original lead source. If you are submitting the file through Salesforce, you will need to classify the file types. See the screenshot below –

NAME	TYPE	SIZE
APP.pdf		621 KB
CRAIG FAULKS PLUMBING LLCAugust1250.pdf		208 KB
CRAIG FAULKS PLUMBING LLCJuly1250.pdf		230 KB
CRAIG FAULKS PLUMBING LLCJune1250.pdf		378 KB
CRAIG FAULKS PLUMBING LLCMay1250.pdf		381 KB
Outlook-gw3izydi.jpg		16 KB

   - If you are submitting the file to an API lender, you will need to review the associated ACCOUNT and CONTACT records. The system will populate all the data it can from the original source application. This may include incorrect phone numbers, email addresses, or entering the same address for the business and the merchant if certain fields are missing or incomplete.

4. FILE CONTROL AND POSITIONS
   These fields will be populated automatically based off the scrubbing software. This is not to be expected to be 100% accurate but to be a quick indicator on the quality of the file so it can be placed properly for submission. Best practices include reviewing the most recent bank statement to ensure the positions are correct and uploaded. It is possible that funding at the end of a month or that came in without a descriptor may be missed.

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Regarding positions, you see them populated with the amount and type (daily/weekly). In each debt record, it will tell you the position and the funder.

See the below example –

5. FAQ
    a. Can I attach more than one deal in an email?
        i. No. Each deal must be sent in separately.
    b. Can I attach more than one application in an email?
        i. No. You may upload the additional entities' bank statements and other documents (depending on file size), but please only attach the MAIN or PARENT company's application in the original email. You can then upload the application to Salesforce manually after it is created.
    c. I cannot access an ACCOUNT/CONTACT for a deal I just uploaded, and I need to change the information. What do I do?
        i. Reach out to your team leader, admin, or office manager to see if they have access to the record. If they do, they can update any information needed for your API submission. If they don't have access, they can request it from someone with submission privileges (Jonathan or Pablo).
    d. I just sent in a deal, and I need it submitted right now. Why don't I see it in Salesforce?
        i. This process does take several minutes to complete. It is processing not only the application but every transaction to get you the information you need to place the file correctly. You can always submit the deal manually though Outlook while the system processes your documents.

e. I need to delete an attachment in the deal I uploaded by mistake, and I can't do it. Help?
    i. Reps do not have permissions to delete data from Salesforce. Best practice is to rename the file to DO NOT USE so that it is not included by mistake on a submission.
f. My K-Lead does not come with an application in PDF. How can I get it uploaded?
    i. Create the application that you'll use to submit the file on your PC first. THEN, follow the instructions above on how to get your deal into Salesforce.