

SALESFORCE CASE STUDY

Majha Capital × Modeverse

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One Pipeline From Application to Funded Deal

ABOUT MAJHA CAPITAL

Majha Capital is a California-licensed commercial loan broker specializing in equipment financing and leasing, commercial truck loans, and commercial real estate funding. Serving a wide range of industries, from construction and medical practices to restaurants, auto dealers, and manufacturers, Majha Capital arranges financing between borrowers and its network of third-party lenders, positioning itself as a fast, flexible alternative to traditional bank financing.

THE CHALLENGE

As a broker working across multiple loan products and industries, Majha Capital's team needed to move each application quickly from initial inquiry through lender matching, underwriting, and funding, often coordinating with several lending partners on a single deal. Without a structured way to track where each application stood, deals could stall between steps, and the team had no consolidated view of pipeline volume or funding performance across loan types and industries.

THE SOLUTION

Modeverse partnered with Majha Capital to bring loan applications, lender matching, and funding status onto a single Salesforce foundation. The engagement included:

- A structured application pipeline in Salesforce, tracking each deal from initial inquiry through documentation, underwriting, and funding in one place.
- A unified borrower record capturing industry, loan type, and lender relationships, so the team has full context on every deal without digging through separate files.
- Automated status workflows moving applications through each stage, so deals don't stall waiting on manual follow-up between the broker and lending partners.
- A structured process for matching applications to the right lending partners based on loan type and industry, speeding up the path to a funding decision.
- Dashboards giving Majha Capital leadership a real-time view of pipeline volume, funded deals, and performance across loan products and industries.

THE RESULTS

With Salesforce connecting applications, lender matching, and funding status, Majha Capital's team now moves deals through the pipeline with a clear, consistent process instead of manual tracking. Applications reach the right lending partner faster, nothing sits stalled between stages, and leadership

can see funding performance across every loan product and industry in real time. The result is a broker operation built to keep pace with its promise of fast, flexible financing.

Unified	*Automated*	*Faster*
Application Pipeline	StatusWorkflows	Funding Decisions

> ***“A business waiting on financing can't afford a deal that stalls between steps. Our systems needed to move as fast as we promise our clients.”***

The idea behind Majha Capital's Salesforce-powered funding pipeline

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ABOUT MODEVERSE

Modeverse is a Salesforce consulting agency helping companies design, build, and optimize Salesforce environments that fit the way they actually work, from Sales Cloud and Service Cloud to Experience Cloud and custom integrations. We partner with our clients from strategy through implementation and ongoing support.

Want to see what Salesforce could do for your organization? Get in touch with Modeverse to start the conversation.