



## VENDOR PORTAL

Welcome to the Eastern Funding LLC Vendor Portal. Thank you for joining our service and as always, we are here to serve you. Below you will find specific instructions to assist you with operating our Vendor Portal. If at any time, you have any additional questions, comments or concerns, please contact Customer Service at 877.819.1764 or 212.819.2000. You can also email us at [info@easternfunding.com](mailto:info@easternfunding.com).

Log into the vendor portal using <https://efxv.secure2050.com/app/login.vcxv>. This link will take you straight into the vendor portal dashboard. Upon logging in, you will see the following sections:

- ✓ Active Apps
- ✓ Funding Apps
- ✓ Summary of Funded Activity (Last 12 months)

**NOTE: To ensure fast, convenient access, it is recommended that the link above be added to your “Favorites” bar in your browser.**

### DASHBOARD

- a) In the **“Active Apps”** section, the **“Status”** field indicates whether the application has been **approved**, the proposal has been **accepted**, or the transaction is **with the Documentation department**. The **“AppCount”** field list the number of applications in a particular status and the **“Total Loan Amount”** indicates the total dollar amount of all apps in a particular status;
- b) In the **“Summary of Fundings (Last 12 months)”** section, the **“Period”** field indicates the specific month that a particular transaction occurred. The **“#Funded”** field indicates the number of transactions that were funded in a particular time period, and the **“Amount Funded”** indicates the dollar amount funded in a particular time period.
- c) To access the information in the **“Active Apps”** field:
  - I. Click on the **folder icon**, A list of all transactions in a particular status will appear;

- II. To display application information, click the **folder icon** next to the subject application to review the application information.
- d) To access the information in the **“Summary of Fundings (Last 12 months)”** field:
    - I. Select the folder icon next to the subject loan to review all funded loans.

## **APPLICATION**

To start a **new** application, go to the left-hand column under the **“Application”** section and complete the following steps:

- a) Click the **Transactions** button at the top of the page and select **Applications**;
- b) Next, click **“New App”** and a **system generated application number** will appear. This number will serve as your reference number throughout the entire process;
- c) The **“Application Status”** should be listed as **“New Application”**;
- d) The **“Create Date”** will auto-populate and should be the same as the day you created the application;
- e) On the left side of the field under the **“Anticipated Fund Date,”** enter the date that that the transaction is expected to be funded;
- f) On the left side of the field under the **“Anticipated Delivery Date,”** enter the date that the equipment is expected to be delivered;
- g) If any documents need to be attached for review, click on **“App Docs”** button, click the **“Select or Drop to Add Files button;”**
- h) If any **notes or specific instructions** need to be conveyed, next to **“Notes”** click the **“Detail”** button and then scroll down to Notes and click **“Add.”** complete the following fields:

**NOTE: All prior messages will be listed in the notes section. Use the folder icon to open specific transactions**

- I. The **“Created Date”** and **“App#”** fields will auto-populate;
- II. Under the **“Company”** field, the information will auto-populate
- III. Use the **“Due”** field to set a reminder to the recipient that the noted event will take place on the selected date; (It can be filled in manually);

- IV. In the **“Status”** field, select the correct status of the note;
- V. The **“Updated”** and **“Created By”** fields will auto-populate;
- VI. In the **“Assigned To”** field, use the drop-down box to select the individual recipient of the note.

**NOTE: All individuals associated with the transaction will auto-populate into the drop-down box.**

- VII. After completing all fields on the **“Notes”** page, click the **“SAVE NOTE”** button and click **“Return To App;”**

**NOTE: When you return to the original in new application page, all notes will be listed and accessible for review under the NOTES field.**

- i) Next in the **“Borrower/Guarantor Info”** section under the **“Legal Company Name”** field (red asterisk), enter the borrower’s name (*the red asterisk indicated that a field is mandatory*). Click **“Add”** to open the fields;

**NOTE: While the “Legal Company Name” field is the only field that must be completed, providing the addition requested information in the “Borrower/Guarantor Info” and “Guarantor Info” sections will greatly assist in processing your application in the most efficient manner.** Under the **“Guarantor Info”** section, click **“Add”** to open up the fields (if applicable);

- j) In the **“Asset List”** section, list the Manufacturer, Model, Description, and Quantity in the applicable fields. To add additional assets, click the **“Add New”** button and a new line will appear requesting the same identical information previously required for the first entry.

- k) Upon completing all required fields on the Vendor Portal Application, click the **“Submit App”** button to transmit the application. If prior to submitting the application changes need to be made, click the **“Green Edit”** button at the top of the page and select either **“Cancel”** or **“Save Changes.”**

**NOTE: Clicking the “Submit App” button is the only way to transmit an application. Any other selection (update, delete, cancel) will not transmit.**

## **ACTIVE APPS**

To review **active applications** and inquire about specific application details:

- a) Click on the **Folder Icon** the **“Active Apps”** tab;
- b) To conduct an application search, go to the **“Transactions”** field, click on **Applications** and utilize the various search fields.
- c) After obtaining search results, click the **“Folder Icon”** button to review your active application.
- d) To make changes to the **“Active App,”** enter the new information in the desired field and click the **“Green Edit”** button to save;
- e) The **“Requirements”** tab at the top of the page is designed to provide information regarding the funding requirements necessary to complete the transaction. This section will list the requirement and provide the current status, complete date, and individual who completed the task;
- f) The items listed in the **“Requirements”** section (*All Loan Documents, ID, Insurance, Final Sales Order/Invoice, Special Requirements, Doc Fee/Cash Collateral*) are applicable to every transaction and all items **must** be checked/satisfied for transaction to be completed;
- g) To return back to the **“Active Apps”** section, click the **“Green Edit”** button and click the **“Cancel”** button.

**NOTE: The Eastern Vision Icon in the upper left corner of the app always brings the user back to the dashboard.**

## **FUNDED APPS**

To review **funded applications** and inquire about specific application details:

- a) Go to the **“Funded Apps”** section to review the applicable time period;
- b) To conduct an application search, go back to the Applications and use the various search fields and click **“Enter”** on your keyboard;
- c) After obtaining search results, click the **Folder Icon** to review your active application;

- d) The items listed in the **“Requirements”** section (*All Loan Documents, ID, Insurance, Final Sales Order/Invoice, Special Requirements, Doc Fee/Cash Collateral*) are applicable to every transaction and **must** be checked/satisfied in the **“Funded Apps”** field for the transaction to be complete;
  
- e) To return back to the **dashboard** section, click the Eastern Vision Icon go back to and click the **“Funded Apps”** tab, or click the **“Cancel”** button.

## **HOME**

The **“Home”** tab takes the user back to the **“Dashboard,”** which contains all information relevant to the specific vendor’s transactions.

## **Logout**

The **“Logout”** tab allows the user to log out properly without closing the entire window.