

2023

# Software Guide

The Leading Software Solutions for  
the Equipment Finance Industry

```
mirror_
elif_operation
mirror_mod.use_x = false
mirror_mod.use_y = false
mirror_mod.use_z = true

#selection.active and add back the deselected mirror modifier
mirror_ob.select=1
modifier_ob.select=1
bpy.context.scene.objects.active = modifier_ob
print("Selected" + str(modifier_ob)) # modifier ob is the active ob
mirror_ob.select = 0
name = bpy.context.selected_objects[0]
name.data.objects.append(mirror_ob)
```

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# Checklist for Evaluating Your Software Solution

**THE INCREASING RELIANCE** on technology by equipment finance companies in virtually every aspect of their businesses makes investment in software solutions a critical consideration. To assist in the decision-making process, the following checklist comprises expert recommendations on what to look for when selecting the right software solution for your business.

## Define Your Goal

First and foremost, when selecting a software solution a clear understanding is needed of strategic goals and how your current software helps or hinders the ability to achieve those goals. Always start from the perspective of the business challenges that need to be solved and include the people on the front lines who can provide direct feedback on obstacles posed by the existing software.

## Configured vs. Customized

There are advantages and tradeoffs with both a standard software solution and a custom build. While a standard solution can be more cost effective, do your research to determine which approach will be more scalable and agile in responding to evolution in the market.

## Integration with System Architecture

All software needs to live in an ecosystem. The solution should have the ability to integrate and support integration with your other systems. Gone are the days of building a stand-alone software application that does not integrate with the business process workflow. The goal of modern software is to increase efficiency through automating processes that often require multiple points of integration. Look for technology that is architected to enable co-development, business intelligence, mobility, and at the heart, robust industry functionality.





## □ Cloud Native

Many businesses are turning to solutions that were made specifically to exist in the cloud. When you 'go cloud' make sure the solution you select is built on one of the leading cloud infrastructures (e.g., AWS, Microsoft Azure, etc.). This is important for delivering at scale and achieving uptime SLAs, industrial grade security, and the ability to expand globally.

## □ Flexibility to Support Growth

Open design and open connection are key for every single technology used today, so your systems need to have mature and comprehensive API capability to position your business for connection and growth. In the equipment finance industry, new products like securitization, participation or new usage-based models are providing different avenues of growth. In evaluating a software solution, it is important to understand if it provides the flexibility to support different financing structures today and with continued growth.

## □ Usability/Ease of Use

Software needs to be easily changed, to enable flexibility and allow businesses to respond to changing industry, regulatory, economic and technology needs.

## □ Support

Regardless of the type of software platform or application being deployed, evaluate resources for

ongoing support. Options can include dedicated support, shared support, shared services and dedicated service offerings for ongoing applications and maintenance.

## □ Vendor Selection

Partnering with the right software provider is key to successful implementation. The software provider you choose should have a proven record with reputable references, financial stability, depth of resources and a willingness to partner. Talk with your software partner about your strategic direction and goals to ensure you are both in alignment, both initially and on an ongoing basis.

## □ Peer Experience

Learning from the experiences of colleagues and others can provide valuable insight into your vendor selection. There are always less-than-ideal situations that present themselves in a software solution deployment. Understanding how the software provider has worked with others through those situations will help you better understand how effectively the software provider manages through difficult issues. Access ELFA resources to help with this on p. 5.

As with any business investment, considerations such as cost benefit, time to implement, change management and internal skills required, among others, also apply. Keeping these issues in mind will provide a solid framework for your software solution decision-making.

## **Get Ready for Section 1071**

On March 30, 2023, the Consumer Financial Protection Bureau (CFPB) released its final rule implementing Section 1071 of Dodd-Frank. Both documents and other supporting materials can be found on the CFPB website.

<https://www.consumerfinance.gov/1071-rule/>

The rule will require financial institutions to collect information about credit applicants and report it to the CFPB on an annual basis along with extensive financial information associated with the application's disposition including extensive pricing information. The timeframe for implementation is staggered based on the institution's volume of annual originations.

For many equipment finance organizations, software changes may be necessary to implement this new process and additional modules may need to be developed or implemented.

ELFA will be active in both the legislative and regulatory arenas on this matter and will provide information to help ELFA members get ready for the rule before their applicable compliance deadline arrives. ELFA members can access resources to prepare for new data collection and reporting requirements on the association's "[Section 1071 of Dodd-Frank](#)" industry topic webpage, including:

- Section 1071: It WILL Affect Your Operation: Here's How, And What You Can Do To Prepare - Recording from ELFA Wednesday Webinar
- 1071 and What This Means for Your Company/Practice - Recording from 2023 ELFA Legal Forum
- Articles from Equipment Leasing & Finance Magazine
- And more

# Solving Technology Puzzles

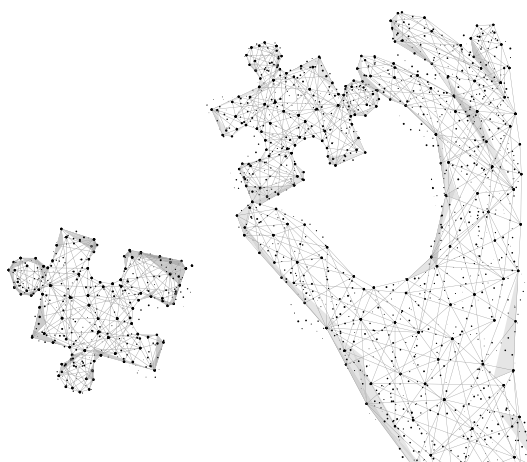
There are a wide variety of specialized apps, software programs, and information services available today to help lenders automate and improve their business processes. Like a new puzzle waiting to be solved, piecing together the right combination of applications and services into a cohesive unit can lead to a result that is both powerful and rewarding. For equipment finance companies looking to take a step forward on their path toward a digitally optimized business, a few themes to consider include:

- **Fraud & ID Verification** - As the demand for online convenience and efficiency increases, so will the need for ID verification and fraud prevention solutions. Numerous companies are expanding on the possibilities of verification technologies to improve upon existing Know Your Customer/Know your Business (KYC/KYB) procedures. Technologies such as facial recognition, scoring models for fraud, background checks, and credit underwriting decision analysis tools are a few types of these solutions.
- **Personalized Experiences** - The push toward digitization has left many businesses and customers wanting a more personalized experience. There are many specialized apps and services working on improving the customer experience through personalized methods such as SMS notification

systems, CRM automation, and other methods of communication.

- **Regulatory Risk & Compliance** - Disparate data sources and unstructured data can be problematic when structuring and generating reports, and enterprise risk management (ERM) technology can be costly. To address these challenges, Anti-money laundering (AML) and payment monitoring technologies are beginning to gain traction across the industry.

See the full list of trends and review the landscape of available services in the Equipment Leasing & Finance Foundation study, "Specialized Apps, Software, and Information Services for the Equipment Leasing & Finance Industry," available at [www.LeaseFoundation.org](http://www.LeaseFoundation.org).



## ELFA Technology Resources

In addition to this software guide, turn to the following resources for more on this topic:

- **Operations and Technology Conference:** This annual conference provides direction and support for equipment finance companies using technology to improve business processes, enhance customer satisfaction and increase operational effectiveness. [www.elfaonline.org/events](http://www.elfaonline.org/events)
- **Innovation Roundtables:** Discover new approaches for tackling your innovation challenges at interactive events from ELFA's Innovation Advisory Council and TomorrowZone. [www.elfaonline.org/events](http://www.elfaonline.org/events)
- **Web Seminars:** Get up-to-speed on technology hot topics. [www.elfaonline.org/webinars](http://www.elfaonline.org/webinars)
- **Operations and Technology Page:** Access articles and research studies from ELFA and the Equipment Leasing & Finance Foundation. [www.elfaonline.org/industry-topics/operations-technology](http://www.elfaonline.org/industry-topics/operations-technology)
- **Operations and Technology Excellence Award:** This program recognizes innovative uses of technology in the equipment finance industry. [www.elfaonline.org/about/awards](http://www.elfaonline.org/about/awards)

# Alfa

## Program Name:

Alfa Systems

## Type:

Asset finance platform for leases, loans and wholesale/inventory finance

## Description:

Alfa has been delivering systems and consultancy services to the global asset finance industry since 1990.

Our best practice methodologies and specialized knowledge of asset finance mean that we deliver the largest and most complex systems transformation projects. With an excellent delivery history over more than three decades in the industry, Alfa's track record is unrivaled.

Alfa Systems, our class-leading technology platform, is the heart and lungs of some of the world's largest and most progressive asset finance providers. Satisfying leasing software requirements of all sizes, the cloud-native Alfa Systems represents an integrated point solution, a rapid off-the-shelf implementation, or an end-to-end platform for the complex global enterprise.

Alfa Systems supports both retail and corporate business for equipment, automotive, wholesale and dealer finance, including originations, servicing and collections. It manages both high-volume transactions and complex leases and loans, in any region, language and currency.

Fully extensible and providing real-time insights, integrated workflow and business rules, alongside business decisions driven by machine learning, the opportunities that Alfa Systems presents to asset finance companies are clear and compelling.

## System Configuration:

Key features of Alfa Systems include:

- End-to-end support for all asset finance products: finance lease, operating lease, loan, hire purchase, per diems
- Easy deployment and integration using the latest technology
- Automated complex decisions
- Multicountry, multicurrency, multi-GAAP

## Comments:

With over 30 current clients and 38 countries served, Alfa has offices all over Europe, Asia-Pacific and the United States.

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<https://twitter.com/alfasystems>



<https://www.facebook.com/alfaworldwide>



<https://www.linkedin.com/company/alfasystems/>



# Selected by America's top equipment finance providers.

No constraints - just possibilities. Adaptable and proven, the cloud-native Alfa Systems platform grows with you, offering exceptional agility and helping you serve your customers efficiently and skilfully.

Working in partnership, we'll help you automate, innovate and challenge in the equipment finance space. Alfa Systems puts your future in your hands.



# CODIX LLC

## Program Name:

iMX

## Type:

Complete leasing/finance software solution

## Description:

CODIX is an international software company, which has developed iMX – the event-driven enterprise management system. iMX provides a complete functional coverage of the full lifecycle of the leasing products, assets and services related to:

- Auto Finance
- Equipment Finance
- Real Estate Finance
- Consumer Finance
- Fixed Deposit
- Revolving Loans

iMX allows all the business processes to be managed within a single technical structure that can easily be parameterized to meet each company's specific needs. That makes it the leading software in several industries: Commercial Finance, Supply Chain Finance, Debt Collection, Accounts Receivable, Consumer Finance, Leasing, Credit Insurance, etc.

iMX Leasing focuses on: Prospecting; Risk management/ Credit decision; Contractualization and Supply Management; Invoicing; Client accounts management/ after-sales operations; Pre-collection, early, late and legal collection; Claims: asset damage/death/unemployment & disability; Early termination/normal expiry (with or without purchase); Re-lease/asset sales, etc.

The end-to-end software system iMX is the global, powerful and flexible, multilingual and multicurrency solution, which consists of 3 core modules:

- iMX Internal Access for back office operations
- iMX External Access: self-care web portal for final users
- B.I. Tool

The heart of iMX is the Expert System, a business process modelling tool and workflow execution engine, which automates even the most complex business processes.

CODIX now operates in 16 countries. The company's top-level multi-disciplinary team is dedicated to the implementation, maintenance and constant evolution of the company's unique product – iMX. The software is currently used in 28 languages by more than 50,000 users in 50+ countries. CODIX is ISO 9001-2015 certified.

## Vendor:

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## Social Media:



[https://twitter.com/CODIX\\_SA](https://twitter.com/CODIX_SA)



<https://www.facebook.com/codix.imx/>



<https://www.linkedin.com/company/codix/>



<https://www.youtube.com/watch?v=zGZvFQK58yl>



*Be part of the solution*





## **INNOVATIVE IT SOLUTION FOR LEASING AND LENDING**

*Auto Finance, Equipment Finance, Real Estate Finance, Consumer Finance, Fixed Deposit, Revolving Loans*

### **iMX KEY BENEFITS**

- ❑ Maximum level of flexibility in the usage and the customization
- ❑ Full integration in your IT landscape
- ❑ Increased productivity and service quality
- ❑ Reliable and stable technologies
- ❑ Scalability from thousands to several millions of cases
- ❑ A fully secure management environment
- ❑ Integration of all communication tools in a unique user interface
- ❑ APIs for unlimited interoperability with other systems
- ❑ Web Technology Components (Spring MVC, Angular)
- ❑ Compliance with any local regulation in any country
- ❑ 24/7 high-level support based on remote maintenance
- ❑ Maximum business processes efficiency and control
- ❑ Enhanced user experience

# Constellation Financial Software

## Program Name:

Vision

## Type:

Origination, Portfolio Management

## Description:

### Constellation Financial Software

Our seasoned team of leasing and software experts have been providing innovative software solutions to the leasing and asset financing industry for over 30 years. We deliver flexible front- and back-end solutions to customers across North America. Our platform is end-to-end integrated, or standalone depending on your specific needs. We believe in automation, and the power it has to streamline clunky and painful processes, reduce risk, empower your team to be more efficient, and our equipment finance software is testament to that.

### Asset Finance Software: Vision

Vision Commerce is an intuitive, complete software solution for asset finance. Built by a lending company, for lending companies, Vision is built to automate and streamline the entire lease and loan lifecycle to help increase business velocity while reducing overhead, and to help leverage better data management to facilitate better decision making.

Whether you need an end-to-end origination and portfolio management solution, or a standalone front-end or back-end compatible with whatever software solutions you have and love, Vision has your asset finance problems solved.

## Recent Enhancements

### Vision Commerce enhancements:

- Borrower Self Creation of Login Credentials with multi-factor authorization via Text Message, email, and reCAPTCHA.
- Automated Scorecards including automated corporate name verification and address verification.
- GDPR and CCPA Implementation
- Client Report Writing Tool
- Mandarin Language Support

- Currency Conversion
- Dealertrack Integration
- Salesforce Integration
- Broker API for automated transfer of applications into Vision
- Scheduled automated emails
- Parent/Child Functionality

## System Configuration:

Vision is a web-based application deployed to the customer in a number of ways based on their needs.

## Comments:

Constellation Financial Software provides specialized software solutions that fuel business growth by helping customers streamline operations, increase efficiencies, and reduce costs. We deliver full asset finance life-cycle solutions.

## Vendor:

Constellation Financial Software

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Oakville, ON L6K 3W7 Canada

Web Site: [www.constellationfs.com](http://www.constellationfs.com); [www.covarity.com](http://www.covarity.com);  
[www.visioncommerce.com](http://www.visioncommerce.com); [www.casitron.com](http://www.casitron.com)

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# VISION

A Constellation Software company

## Flexible Solutions for Asset Finance

Whether you need an end-to-end origination and portfolio management solution, or a standalone front-end and back-end compatible with whatever software solutions you have and love, Vision has your asset finance problems solved.

**Visit**

**[constellationfs.com/vision](https://constellationfs.com/vision)**

**to learn more**

**Constellation**  
Financial Software





# Copernicus-USA, LLC

## Program Name:

Copernicus

## Type:

Full Lifecycle Pricing, Origination, Administration and Accounting System for all types of Asset Finance

## Description:

Copernicus is a state of the art web native solution to manage the whole lifecycle of any asset finance product including leasing, loans, conditional sale and project finance. Developed over 40 years and recently upgraded, it is the most powerful and technologically advanced solution available. Copernicus is a cost-effective solution for all types and sizes of asset finance organization.

Copernicus has its own built in calculation engine to ensure you get accurate and consistent results throughout the life of a contract including pricing and accounting for full and partial payoffs and back to back and block funding.

Copernicus also has its own integrated double entry accounting system which ensures that you maintain control of each and every single contract at all stages of its progress from pay out to pay off.

Process any payment structure, with multiple drawdowns and other complex cash flows, including commissions, subsidies, maintenance, fees and insurance.

Copernicus has its own user-configurable workflow and sophisticated decisioning and credit scoring. You can design your own reports and documents directly from within, and then incorporate fields from the comprehensive SQL Server database. Bills, reports and other documents can be downloaded to Excel or saved to PDF and emailed again directly.

Since it uses the latest web technology Copernicus can be readily integrated with your other systems including CRM such as Salesforce and backend such as third party general ledger systems. There are also options to build portals to give your customers, brokers, funders and suppliers a controlled view of their data within your Copernicus system.

## Recent Enhancements:

Copernicus is now available using React and restful web services. This has increased its speed, control and flexibility.

## System Configuration:

Designed and built using a React user interface accessing Microsoft's .NET5 web services and SQL Server.

## Comments:

Copernicus offers a new approach to asset finance software designed to reduce implementation timescales and costs both upfront and ongoing.

## Vendor:

Copernicus-USA, LLC  
4163 Los Altos Ct  
Naples, FL 34109  
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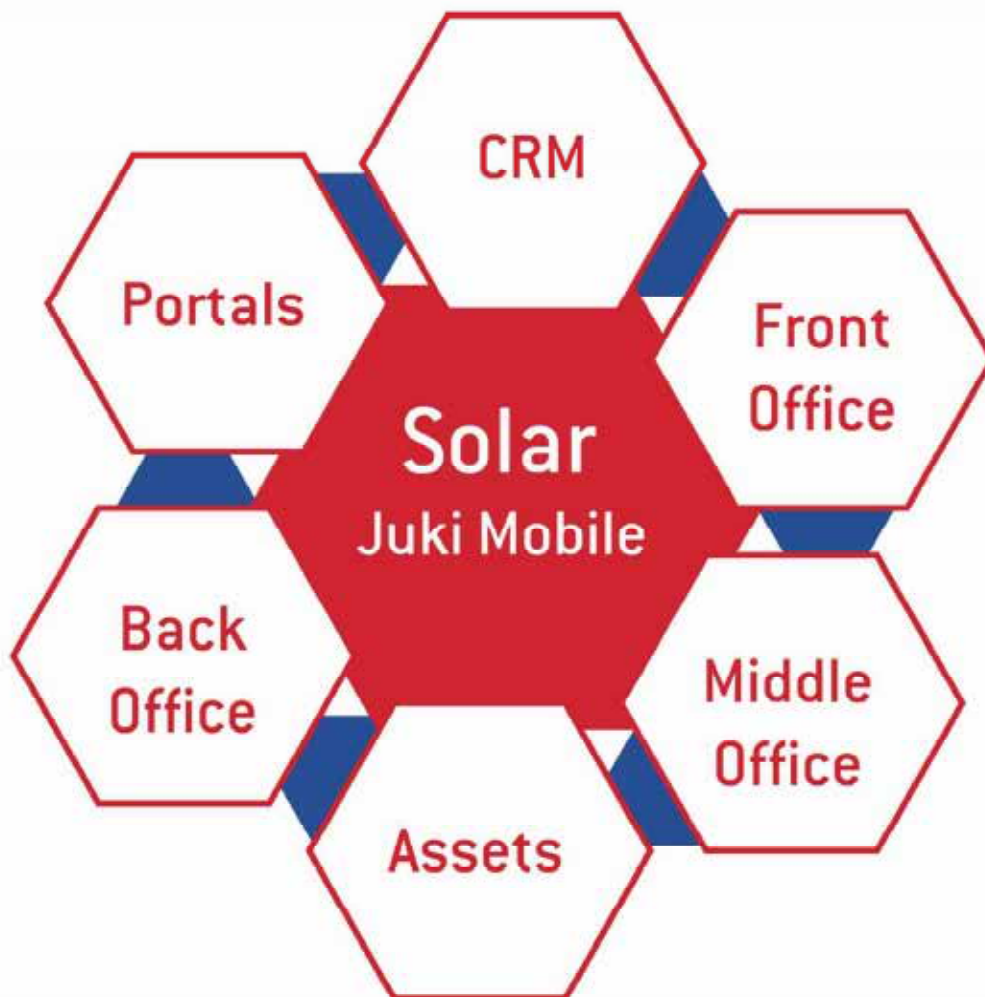


**COPERNICUS**  
EMPOWERING ASSET FINANCE

[www.copernicus-consultants.com](http://www.copernicus-consultants.com)

## SOFTWARE - THE MODERN WAY

EMPOWERING ASSET FINANCE



- Quick to Implement
- Easy to Use
- Affordable Pricing

- Latest Technology
- Cloud Based
- User Configurable

# Dominion Leasing Software LLC

## Program Name:

LeaseComplete, DecisionComplete, LC Portal

## Type:

Lease/Loan Portfolio Management, Asset Management, Credit Origination and Workflow, Customer Self-Service

## Description:

LeaseComplete© is an industry leading, comprehensive back-office solution for lease & loan portfolio management. Featuring flexible billing schedules, including true weekly invoice accounting, and robust inventory tracking and reconditioning, including preventive maintenance with work orders. A complete funding module allows management of credit lines (internal and external) and funder-required reporting. Create your own custom screens and reports, or select from the over 700 reports included. Web service deployed, the system boasts a comprehensive, certificate-based API to facilitate integrations with third-party services.

DecisionComplete© is a modern, role-based, workflow driven credit origination solution. Browser-deployed to empower your remote salesforce, the system features a vendor portal for seamless handling of third-party originations. Integrated features include document creation/management, credit evaluation, and one-step funding.

LC Portal© is a real-time, self-service portal for your customers. Designed for access on desktop or mobile devices, the system allows your customers to view account status, maintenance records, & history, submit payments, download documents, and even run real-time reports from a simple, touch-friendly user interface.

Offered in either subscription or SaaS models, the CompleteSuite© is the most comprehensive equipment finance solution available at any price-point!

## Recent Enhancements

Annual product upgrades, including dozens of new features, are part of our standard system maintenance program.

## System Configuration:

All of our solutions are offered either on premise or in your private cloud via a subscription model, or hosted via the Dominion Cloud. Our solutions are built on the Microsoft stack, deployed via web services, and utilize a SQL Server database.

## Comments:

*"LeaseComplete has proven to be a solid and reliable product to handle all aspects of managing and servicing our growing equipment lease portfolio."*

- Frost National Bank

## Vendor:

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## Social Media:



<https://twitter.com/dominionls>



<https://www.facebook.com/dominionls>



# The Premier End-to-End Equipment Finance Solution

## The Dominion CompleteSuite<sup>®</sup>



- ◇ **LeaseComplete<sup>®</sup>** is an industry leading, back-office solution for lease and loan portfolios featuring a customizable UI, funding & credit management, asset reconditioning, and over 700 reports.
- ◇ **DecisionComplete<sup>®</sup>** is a role-based, workflow-driven credit origination solution featuring integrated documentation creation, credit evaluation, and seamless contract funding.
- ◇ **Customer Portal** provides a real-time support experience for your customers including customized inquiry, payoff quotes, online payments, document downloads, and ad-hoc reporting.



**Dominion**  
Leasing Software  
[www.domls.com](http://www.domls.com)

*Offered on either a subscription or SaaS basis, the CompleteSuite<sup>®</sup> is the most comprehensive equipment finance solution available at any price-point!*



804-477-8480

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◆ [sales@domls.com](mailto:sales@domls.com)

# FIS

## Program Name:

FIS Asset Finance

## Type:

Cloud platform for all types of asset finance including leases, loans and wholesale finance.

## Description:

FIS™ is the world's largest global provider dedicated to financial technology solutions. FIS empowers the financial world with software, services, consulting and outsourcing solutions focused on retail and institutional banking, payments, asset and wealth management, security, risk and compliance, and transaction processing.

Headquartered in Jacksonville, Florida, FIS is a Fortune 500 company and is a member of Standard & Poor's 500® Index. We serve more than 20,000 clients in over 130 countries.

FIS Asset Finance transforms your business by consolidating your portfolios into a single system and reduces your operating costs by automating workflows and opening up access to your partners and customers.

### *Key Product Features*

- AI enabled automation engine
- Intuitive low code business rules engine enables business change to be rapidly delivered
- Flexible integration layer via APIs and industry standard interfaces
- Continuous automated upgrades

### *Benefits:*

- Reduce total cost of ownership and increase speed to market
- Improve risk management and compliance
- Smarter and more efficient operations
- Improved change cadence

Supporting these product capabilities is a world class delivery methodology and organization staffed by professionals with years of experience in the leasing industry.

## Recent Enhancements

Machine learning capabilities for automated data ingestion

Low code, drag and drop business logic designer

## System Configuration:

The HTML5 user interface provides unmatched usability across any device in any location. Intuitive, and business owned, configuration of rules and workflow delivers a lower TCO and an upgrade path through all versions.

FIS supports any deployment model including FIS Cloud, Public Cloud and On-Premise installations and will provide Application Managed Services according to client needs.

## Comments:

We never lose sight that FIS succeeds only when our clients succeed.

## Vendor:

FIS

601 Riverside Ave.

Jacksonville, FL 32204

Web Site: <https://www.fisglobal.com/en/banking-solutions/lending/commercial-lending/fis-asset-finance>

## Contact:

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Empowering  
the Financial World







**Ambit Asset Finance**

# IT'S TIME TO BREAK FREE

Enhance your asset finance  
digital transformation with FIS.

As the digital economy continues to emerge, discover how modern software with continuous delivery models can transform your asset finance business and raise customer satisfaction.



**Kick-start your digital  
transformation with FIS.**

**Find out more** <https://empower1.fisglobal.com/asset-finance.html>

# Integrated Financial Solutions, Inc.

## Program Name:

IFSLeaseWorks

## Type:

Lease/Loan Accounting, Administration and Originations

## Description:

IFSLeaeWorks is a web-based, touch-enabled application that runs seamlessly on a desktop, tablet, or phone based browser. IFSLeaseWorks efficiently and reliably manages the entire life cycle of a lease or a loan. This application is ideal for organizations of all sizes needing an asset-based, vendor-centric solution to manage originations and administration of lease and loan portfolios.

IFSLeaseWorks is comprised of configurable modules that support industry best practices and those practices that make your organization unique.

## Features:

- \* Customizable work-flow, screens, fields, and field labels
- \* Configurable asset level accounting
- \* Support for direct finance leases, operating leases, interim rent leases, progress payment leases, synthetic leases, fixed and floating rate loans, customer lines of credit, securitizations, and syndications
- \* Support for vendor programs including private-label programs, pass-through AR, residual sharing, blind discounts, and web based vendor/dealer workflow (application workflow, documentation and reporting)
- \* Automated credit scoring using a rules-based credit engine or Fair Isaac Liquid Credit
- \* Multiple billing options (ACH, Lock-Box, and Credit Cards)
- \* Flexible invoicing including unlimited invoice formats and email enabled invoices
- \* Lease Extensions and re-writes
- \* User-definable asset-level buyout quotes
- \* Outbound documentation including unlimited user-defined letters, letter archiving, letter workflow and email enabled transmission
- \* Configurable collections actions including promise-to-pay and collector productivity tracking capabilities
- \* Integrated outbound/inbound Texting
- \* Event driven notifications allow for proactive system monitoring

## Recent Enhancements

- \* DocuSign interface
- \* Dealer/Vendor Portal
- \* Customer Service Portal
- \* Reporting Portal
- \* A rich library of Web Services (APIs) to interact with external systems such as Salesforce

## System Configuration:

Client Browser: Chrome, Edge, Safari, IE  
Database: Oracle DBMS 11g/12c on Unix/Linux/Windows  
Development Platform: jQuery

Licensed on premises or ASP/Hosted Solutions

## Comments:

IFS Offers Custom Development and Implementation Consulting

## Vendor:

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**New!**  
Complete Salesforce integration



# IFS LeaseWorks

A complete leasing and lending solution

**IFS LeaseWorks** is a complete lease and loan management system that manages the entire lifecycle of a lease or loan from origination through termination... All Under One Roof.

- Create your own application ecosystem using IFS LeaseWorks Web Services/APIs to integrate with external applications such as Salesforce
- Use IFS LeaseWorks core capabilities or extend to Salesforce.com using our front-end, collections and customer service pre-built applications
- Browser-based interface runs on desktop, tablet or mobile devices
- Customizable screens, fields and user-specific notifications and workflow
- Two-way text messaging and tracking for customer communications

**Exceptional** software. **Extraordinary** support.

Contact Us For a Demonstration

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# Ivory Consulting Corporation

## Program Name:

SuperTRUMP, Portfolio Intelligence, Asset Management Solution

## Type:

Financial modeling software, including lease & loan pricing, portfolio analytics and asset management

## Description:

### SuperTRUMP

Ivory's flagship product, SuperTRUMP, is the proven solution for modeling and pricing complex equipment leases and loans. It incorporates the most up-to-date tax and accounting classification tests, pre-tax and after-tax analyses and pro forma accounting output, as well as many pre-configured industry reports.

SuperTRUMP Oracle Lease & Finance Management Accounting (OLFM) provides complex accounting for OLFM.

SuperTRUMP can be customized to meet your unique needs in many ways, including:

- Adding custom yield calculations and controls
- Developing custom lookup tables for loss given default, money cost or yields
- Creating custom reports

### Portfolio Intelligence

Portfolio Intelligence offers business intelligence and data analytics which enables you to optimize portfolio profitability.

- Measure portfolio profitability by segment, customer, financial product, credit, channel, geography or sales professional across all transactions
- Use "what-if" scenarios to better understand and manage risk factors
- Syndicate all or part of a portfolio for sale or evaluate a portfolio for purchase in a matter of minutes with advanced syndication tools

### Asset Management Solution

Ivory's Asset Management Solution is an end-to-end asset management software solution designed to make tracking, managing and controlling your entire asset management operation significantly easier than it is today.

- Create and manage asset valuations
- Track mid-term and end-of-term disposition information

- Order and access completed inspection reports, track returned equipment and assign the asset for resale
- Build executive level analyses detailing residual exposure and performance across an entire portfolio

## System Configuration:

SuperTRUMP is deployable via Salesforce, Web & Desktop interfaces

Database products currently run on SQL Server or Oracle.

## Vendor:

Ivory Consulting Corporation  
325 Lennon Lane  
Walnut Creek, CA 94598  
Web Site: [www.ivorycc.com](http://www.ivorycc.com)

## Contact:

Scott Thacker, CPA, CLFP  
Phone/Fax: (925) 926-1100/(925) 926-1335  
Email: [scott.thacker@ivorycc.com](mailto:scott.thacker@ivorycc.com)

## Social Media:



[https://www.linkedin.com/company/ivory-consulting-corp./](https://www.linkedin.com/company/ivory-consulting-corp/)



IVORY  
SUPERTRUMP



“

First American Equipment Finance has used SuperTRUMP for Salesforce since 2014. The Ivory team brings a level of unmatched expertise to the solutions that they deliver. The custom nature of the solution has allowed us to evolve our pricing tool as our product offering has expanded. SuperTRUMP for Salesforce allows us to intuitively configure complex cash flow scenarios, such as step and progress payments, to deliver comprehensive pricing solutions to our clients. The tool delivers efficiency, simplicity and minimizes risk of user error – reducing time to quote by over 50% as compared to alternative pricing methods that we have utilized. This has allowed our colleagues to spend more time and energy delivering exceptional customer experience.”

**Mike Wiedemer**

*Senior Vice President - National Sales Director*  
American Equipment Finance

# Leasepath

## Program Name:

Leasepath

## Type:

CRM, LOS

## Description:

Leasepath is the Intelligent Workplace platform for Customer Engagement (CRM) and Origination (LOS), purpose-built exclusively for the equipment finance industry. Leasepath is powered by the Microsoft Power Platform to provide a proven, cloud-first solution complete with configurable, dynamic, automated solutions for pricing, amortization calculation, asset management, tax, documentation, and integration with mission critical applications like e-mail, e-signature, and KYC credit and data providers. Leasepath is the preferred choice for equipment finance businesses to win more deals, risk less, and profit more.

Companies that use Leasepath are able to close more deals through greater efficiencies in their sales process, risk less capital thanks to seamless access to customer exposure and credit details, and profit more by decreasing close duration, automatically structuring deals with accurate rate factors and pricing rules, and through proactive insights through analytics. It's why we say that Leasepath is the preferred choice to equipment finance businesses to win more, risk less, and profit more!

Leasepath offers:

- Quick to Implement, Highly Extendable Cloud Platform for Origination
- Low-Code, No-Code Configuration Tools and Apps for Tablets and Mobile Devices
- Streamlined Sales Process with Dynamic Checklist Items, Credit Scorecards, and Workflows
- Funder Profiles that Fit the Right Lender for a Deal
- Unique Asset Records with Dynamic Fields, Valuations, and Location Tracking
- Automated Credit Pulls and KYC Searches through partners such as Experian and Lexis Nexis
- Integrations with Contract Management Solutions and General Ledger Solutions
- Seamless Exposure Tracking on Accounts and Contacts
- Audit Trail and Document Management Meeting SEC Guidelines

- Vendor and Broker Portal Connects Lenders, Brokers, and their Suppliers Through a Seamless Web Interface.Guidelines
- Vendor and Broker Portal Connects Lenders, Brokers, and their Suppliers Through a Seamless Web Interface.

## Recent Enhancements

Leasepath delivers free, quarterly updates that include new solutions such as:

- Ability to easily configure credit decision automation with custom business rules.
- New options added for using Commissions, Rate Cards, Financial Products, and the Funder Fit.
- Integrations & enhancements with partners like IDology ID Verification, Lexis Nexis Emailage, and Microbilt.

## System Configuration:

Leasepath is deployed on the Microsoft Azure Cloud, embedded within the Dynamics 365 for Sales platform. Customers own their data and environments. Administrators manage their own tenants, and users access with single sign-on Microsoft credentials.

## Vendor:

Leasepath  
30700 Russell Ranch Road  
Westlake Village, CA 91362  
Web Site: [www.leasepath.com](http://www.leasepath.com)

## Contact:

Sean Scampton  
Phone: (651) 603-4491  
Email: [sean.scampton@leasepath.com](mailto:sean.scampton@leasepath.com)

## Social Media:




 <https://www.linkedin.com/company/leasepath.com/>



# Asset Finance and Leasing Platform for Customer Engagement & Originations

Originating finance (loan) and lease contracts can be a cumbersome process, with incomplete data from Sales, nearly infinite pricing variables, interfaces with internal and external systems, and Credit Underwriting delays or inconsistent criteria. **Leasepath is the solution.**



							
<b>Lead Management</b>	<b>Origination Workflow</b>	<b>Credit Adjudication</b>	<b>Document Automation</b>	<b>Analytics &amp; Reporting</b>	<b>Digital &amp; Mobility</b>	<b>Data Security &amp; Audit</b>	<b>Custom Portals</b>

<b>Win More</b>	<b>Risk Less</b>	<b>Profit More</b>
-----------------	------------------	--------------------

- Track opportunities, automate responses, understand customer needs, visualize the sales funnel
- Easily solve for infinite pricing models to gain acceptance
- Close more deals

- Single view of the customer
- Credit Scorecard Automation
- Automatically aggregate exposures, pay histories, limits, risk profiles
- Decision automation or support

- Business insights & analytics enable proactive decisions
- Increase productivity
- Decrease sales close duration
- Visualize the portfolio to identify and pursue higher-profit segments

Built on Microsoft Power Platform and leveraging the Microsoft Dynamics 365



# Linedata Lending and Leasing

## Program Name:

Linedata Ekip360

## Type:

Front, Middle and Back Office Automation for Leasing & Lending

## Description:

Close deals faster, assess risk more efficiently, and accelerate the growth of your business with Ekip360; Linedata's digital financing software solution designed for equipment financiers and lessors of any size.

Ekip360's modular front and back-office solutions can stand alone or integrate within your existing credit ecosystem to create a seamless end-to-end experience for your customers. From acquisition to contract management, Ekip360 is built to go beyond. Our smart automated solution and accessible data allow for more informed decisions to be made faster.

Whether you're just starting to digitize your operations or at the cutting-edge of digital transformation, with our experience and expertise, Linedata is here to help you go beyond business as usual.

## Recent Enhancements

Our unparalleled flexible software allows you to run your business, your way. With thousands of API integrations and custom configurations available every step of the way, you can create your ideal credit ecosystem.

Enhance your digital consumer journey with Mobil'Ekip, our state-of-the-art customer-facing mobile solution. If you're looking to utilize your own portal or app, Ekip360's webservices can integrate with your partners to create a digital experience that is sure to exceed customer expectations.

## System Configuration:

The Linedata implementation methodology is based on workflow best practices developed with world-class financial institutions. Linedata's products allow financial institutions to streamline existing processes and information flows, replacing inefficient paper-based or free-standing processes with fully integrated end-to-end equipment finance and leasing solutions.

## Vendor:

Linedata Lending and Leasing  
1111 3rd Ave  
Suite 950  
Seattle, WA 98101

Web Site: <https://www.linedata.com/lenders-and-lessors/equipment-finance>

## Contact:

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Email: [Tay.Shah@na.linedata.com](mailto:Tay.Shah@na.linedata.com)

## Social Media:



<https://twitter.com/linedata>



<https://www.linkedin.com/company/linedata>







Linedata

# At Linedata, we humanize technology

Drive your business with efficiency, diligence and risk management. Linedata Ekip<sup>360</sup> provides a streamlined path from client acquisition to contract completion with fully configurable workflows, helping you close deals with speed and consistency. Modular front, middle and back office solutions can standalone and integrate within your existing credit ecosystem or be combined for a seamless end-to-end experience.

Linedata offers dynamic and configurable software, data and services with a deep commitment to a partnership approach to help our clients succeed.

Close deals faster  
Manage risk  
Offer a fully digital customer experience  
Grow your business

To learn more, please contact [getinfo@na.linedata.com](mailto:getinfo@na.linedata.com) or visit [www.linedata.com/linedata-ekip360](http://www.linedata.com/linedata-ekip360)

With 20 years' experience and 700+ clients in 50 countries, Linedata's 1300 employees in 20 offices provide global humanized technology solutions and services for the asset management and credit industries that help its clients to evolve and to operate at the highest levels.

# Liventus, Inc.

## Program Name:

Custom Software Solutions - Equipment Finance

## Type:

End to End Business Process Automation

## Description:

Liventus' solutions revolutionizes how equipment finance companies manage their processes, allowing them to streamline operations and achieve enhanced efficiency.

1. Liventus' software and integrations lets companies gain real-time visibility into their operations, with dashboards and reporting tools to monitor performance and make informed decisions. We can also help build a unified platform, eliminating the need for multiple systems and ensuring data consistency.
2. Liventus offer extensive customization options to tailor our service to your unique needs, including workflows, templates, and configurations. As your business grows, our solution scales alongside it.
3. Data security is a top priority, with encryption, access controls, and regular audits to ensure compliance with industry standards and regulations. Your sensitive information is protected, building client trust and meeting regulatory obligations.

## Recent Enhancements

Automation Benefits:

- Loan Origination: Streamline application processing, credit checks, and document verification for faster, error-free results.
- Underwriting: Automate credit scoring, risk assessment, and decision-making for reliable and efficient underwriting.
- Payment Processing: Simplify payment collection, invoice generation, and reconciliation for streamlined financial management.
- Contract Management: Automate contract generation, e-signatures, tracking, and alerts for effective lifecycle management.
- Reporting and Analytics: Gain real-time insights through automated data collection, report generation, and distribution.
- CRM: Enhance customer relationship management with automated lead generation, tracking, communication, and follow-ups.
- Regulatory Compliance: Ensure compliance through automated data collection, reporting, and audit trails.

## System Configuration:

Liventus is a Microsoft Gold Partner with extensive experience in CRM customization, SQL integrations, and seamless data migrations on Sharepoint, Salesforce, Azure, and Office 365 platforms.

## Vendor:

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3400 Dundee Road, Suite 180  
Northbrook, IL 60062  
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## Social Media:



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# Liventus

Streamline Your Equipment Financing Process With Liventus Automation - Finance Smarter, Not Harder!



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- Process Automation
- Portals
- Credit Scoring Tool



- Supplement Workforce
- Project Based Staffing
- Access Expertise
- Collaborate Over Tasks



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**DANIELLE DOLLOFF**  
EVP of Sales & Marketing  
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☎ 847.443.2593

# LTi Technology Solutions

## Program Name:

ASPIRE

## Type:

LTi Technology Solutions provides a full lifecycle technology ecosystem of solutions for equipment finance and asset-based lending products.

## Description:

We are a passionate, client-focused global company that works with all sized businesses, from small independent, middle market through large enterprises, within the US, UK and Canada, providing a single platform, equipment finance lease and loan software technology ecosystem.

We are a Trusted Platform in the equipment finance industry – Taking a partnership approach with 34+ years supporting this industry.

The ASPIRE platform brings innovative functionality for the entire asset lifecycle on a single platform.

We are AICPA - SOC certified - [Veracode Verified - ASPIRE v5](#)

We have a Tenured Team – with an average tenure of 14 years in the equipment finance industry, our team's expertise is unparalleled.

We have Top Tier Clients – we are consistently the top choice for Monitor-ranked companies – 40% of the Monitor 100 use our platform, and 50% of the Monitor 30+ Independents use our solutions.

## Recent Enhancements

With the depth of functionality within ASPIRE, every process can be managed seamlessly with even the most complex workflows. Automating redundant and manual tasks to drive down the cost per contract and removing the potential for manual errors.

LTi's flexible architecture provides the ability to scale as a business grows on a single system. More than 120 of our clients are hosted in the LTi Cloud and have been for over 15 years.

## System Configuration:

LTi's solutions can be deployed in-house, or hosted in the LTi Cloud.

## Comments:

"Our collaboration with LTi is one of the best relationships we've ever had with a technology provider and they deliver a world-class platform."

Adam Warner – President, Key Equipment Finance

Contact Sales at (402) 493-3445.

Travis Melchior

Email: [tmelchior@ltisolutions.com](mailto:tmelchior@ltisolutions.com)

Tara Aasand

Email: [taasand@ltisolutions.com](mailto:taasand@ltisolutions.com)

## Vendor:

LTi Technology Solutions

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Omaha, NE 68137

Web Site: [www.ltisolutions.com](http://www.ltisolutions.com)

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<https://www.facebook.com/LTiSolutions/>



<https://www.linkedin.com/company/lti-technology-solutions/>



**LTi**  
Technology  
Solutions





**LTI**  
Technology  
Solutions



**VERACODE** \*  
VERIFIED STANDARD

## TRUSTED PLATFORM

The technology ecosystem of choice to reduce errors, automate data exchange, reduce manual processes and scale with business growth.

### TENURED TEAM

With an average tenure of 14 years in the equipment finance industry, our team's expertise is unparalleled.

### TOP TIER CLIENTS

LTI is consistently the top choice for Monitor-ranked companies.

**50%**

of the  
MONITOR 100  
use our platform

**40%**

of the  
MONITOR 25  
Independents  
use our solution

[\\*www.veracode.com/verified/directory/lti-technology-solutions](http://www.veracode.com/verified/directory/lti-technology-solutions)

**“Our collaboration with LTI is one of the best relationships we’ve ever had with a technology provider, and they deliver a world-class platform.”**

- Adam Warner, President at Key Equipment Finance

**LTiSolutions.com | +1 (402) 493-3445**

# NETSOL Technologies

## Program Name:

Ascent, Digital, AppexNow

## Type:

Omni-Channel Credit Origination, Lease/Loan Management, Wholesale Floorplan Financing, Calculation Engine, API-Library

## Description:

NETSOL Technologies is a US-based, leading financial technology provider to the global equipment finance & leasing industry, catering to companies with ever growing & diverse business requirements worldwide.

NETSOL's premier platform NFS Ascent is a proven, unrivalled and highly adaptive solution for the global equipment and asset finance and leasing industry. The solution fully automates the entire financing/leasing cycle for companies of any size, including those with multi-billion-dollar portfolios.

NETSOL is also the pioneer in the global finance and leasing industry to offer a full suite of digital transformation solutions – NFS Digital.

The company recently also introduced AppexNow – the first marketplace for API-first products specifically for the global credit, finance and leasing industry.

The company introduced 'Flex' as the first product offering from the marketplace. Flex is an API-based, out-of-the-box calculation engine. It is a pure-play SaaS product that is cloud-based and can be integrated seamlessly into an organization's products, services and ecosystem.

The second product from the marketplace is Hubex - an API library that enables companies to standardize all their API integration procedures across multiple API services through a single integration.

## Recent Enhancements

User experience enhancements for Web/Desktop, Web UI/UX enhancements are made to the Ascent platform's Omni Point of Sale solution. Further enhancements to health and monitoring are made. Other product upgrades for NFS Ascent® include Single Sign On (SSO) Implementation, Product Compatibility Release with Microsoft SQL Server 2017 and upgrading of third-party controls and frameworks to the latest versions.

## System Configuration:

NFS Ascent supports the latest standards for interfacing making it easy to integrate with surrounding or 3rd party systems & offers configurability over customization to make real time changes possible in the system, using an advanced Business Rules Engine, powerful Business Process Management, Workflow Management and an Integration Hub.

## Comments:

With over four decades of experience & global offices in North America, Europe & across Asia Pacific, NETSOL has over 200 clients worldwide with over 25,000 users globally - all while maintaining its 100% implementation success rate.

## Vendor:

NETSOL Technologies  
16000 Ventura Blvd  
Suite 770  
Encino, CA 91436  
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## Contact:

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## Social Media:



<https://twitter.com/netsoltech>



<https://www.linkedin.com/company/netsol-technologies-inc-/>



<https://www.youtube.com/watch?v=hsyWSPP7vXc>





# Curated Digital Solutions for the Equipment Finance and Leasing Industry.



Rapid Deployment



Seamless Third Party Integrations



On Premise and Cloud/SaaS



API-first Solutions

NFS ASCENT | **Appex N·w**



[www.netsoltech.com](http://www.netsoltech.com)



# Northteq

## Program Name:

Aurôra - Loan Origination System & Partner Portal

## Type:

Loan Origination System  
Partner Portal  
Turnkey Salesforce Apps

## Description:

Powered by Salesforce, Northteq's loan origination system (LOS) and partner portal, aurôra, was built on a UX/UI driven infrastructure, enabling lenders to fully automate the loan origination experience – from application to documentation in just 3 minutes.

### Aurôra LOS

Northteq's automated end-to-end LOS eliminates manual processes and disconnected workflows, making it easy to originate, score, decision, and document deals in minutes. Turn opportunities into funded transactions faster with aurôra.

### Aurôra partner portal

Northteq's partner portal empowers vendors, brokers, and partners to seamlessly self-serve their deals. Experience touchless deal submissions, real-time status updates, and frictionless collaboration with vendors and borrowers. Eliminate the endless email threads and enable your partners to sell equipment faster.

### Turnkey salesforce apps

By partnering with leading fintech providers such as Ekata, Tvalue, Middesk, PayNet, Plaid, and many others, Northteq's turnkey salesforce apps enable lenders to create a customized, embedded loan origination experience.

Trusted by over 175 lenders, Northteq has established itself as a go-to partner for equipment finance lenders seeking automated and intuitive salesforce powered solutions.

## Recent Enhancements:

- App to App drag and drop OCR technology enables instant population of credit applications into salesforce and eliminates paper-based applications.
- Equipment Finance as a Service (EFaaS) utilizes a 100% API enabled integration, taking a deal from application to documentation without human involvement.
- White-labeled credit applications for vendor and broker partners ensure a seamless and personalized application process.
- The enhanced credit summary feature offers lenders a comprehensive overview of their borrower by conveniently consolidating trusted credit information into a single snapshot.

## System Configuration:

Salesforce.com is a 100% cloud based open architecture.

## Comments:

For more information, please visit [northteq.com](https://northteq.com).

## Vendor:

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729 North Washington Avenue  
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## Contact:

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## Social Media:

 <https://www.linkedin.com/company/northteq/>





# nōrthteq

salesforce powered

## aurōra

stop drowning in emails.

# take control of your inbox.

we can help!

[find out more](#)

Streamline the endless email threads and manual processes. Experience touchless deal submissions, real-time status updates, and frictionless collaboration with your vendors. Start sailing smoothly above the email waves.

- loan origination system
- partner portal
- turnkey salesforce apps



northteq.com

# Odessa

## Program Name:

Odessa

## Type:

End-to-end, browser based, global lease and loan management platform

## Description:

Headquartered in Philadelphia, USA, Odessa is the largest leasing-focused technology company in the world. With a highly specialized team of more than 1300 professionals across North America, Europe, LATAM and Asia Pacific, Odessa has a 25-year track record of excellence in providing industry-leading technology.

### A platform for digital transformation

The Odessa Platform is an end-to-end asset finance solution, delivering comprehensive functionality that enables self-service, automation, and business agility. Odessa's platform philosophy means reduced cost and complexity associated with traditional upgrades and legacy providers – by delivering 4x annual platform releases, customers can easily adapt, go to market faster with new products, and remain nimble.

Odessa 'out of the box' is scalable and affordable to implement, with all the power of an integrated enterprise solution to support the unique needs of banking, captive and independent businesses. It provides increased operational efficiency with feature-rich customer and partner portals, connecting all stakeholders of the modern asset finance enterprise for a 360-degree view of the business.

### Recent Enhancements

Recent platform enhancements include market-ready everything-as-a-service and subscription management capability, IoT-ready component-level asset tracking and data management, generative AI chat bot for omnichannel CX, one-click deployment in the Cloud, and extensibility via low-code development and test automation.

### System Configuration:

Current Version: Odessa 5

Odessa Platform: .NET 4.8

Language: C#, ASP.NET, VISUAL STUDIO 2017/2019

Database: SQL Server 2017/2019

## Vendor:

Odessa

Two Liberty Place

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Philadelphia, PA 19102

Web Site: [www.odessainc.com](http://www.odessainc.com)

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## Social Media:



<https://twitter.com/OdessaTech>



<https://www.facebook.com/OdessaInc>

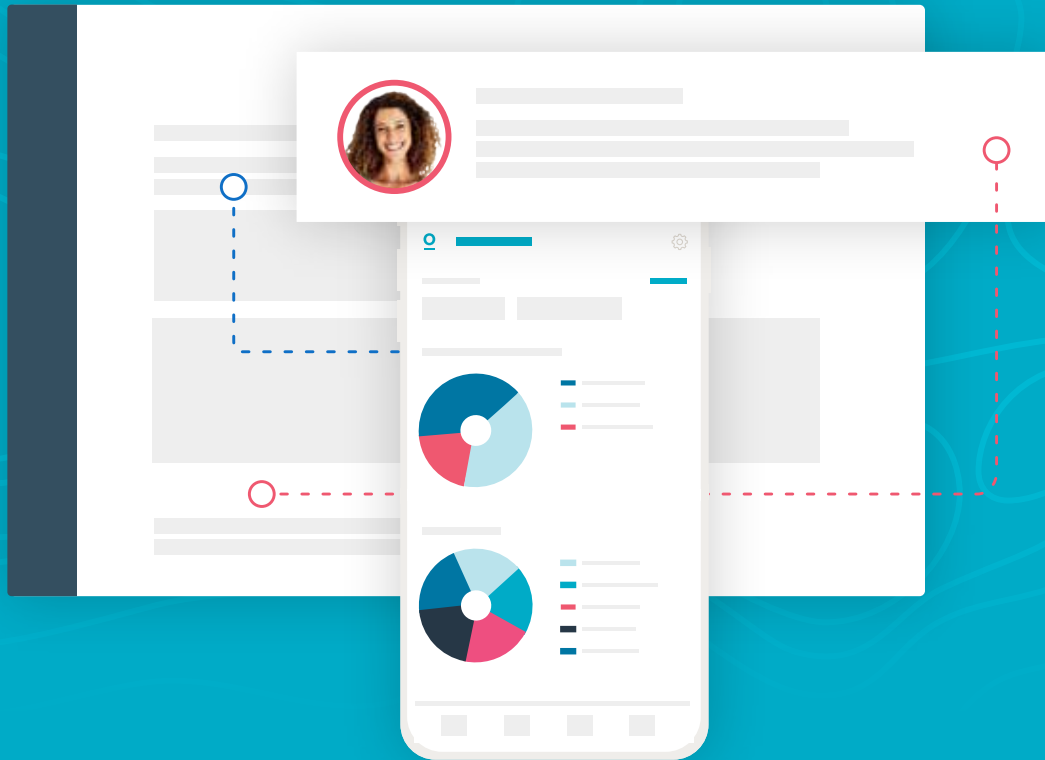


<https://www.linkedin.com/company/odessa-inc-/>

# Adapt easily, build confidently, scale faster

Design asset finance experiences that succeed today - and can be easily changed tomorrow. The Odessa Platform provides one single solution - from origination to remarketing - and enables you with intelligent, integrated low code configuration and development. This is your platform, your way.

**odessa**



[www.odessainc.com](http://www.odessainc.com)



# Orion First Financial, LLC

## Program Name:

Orion First Portfolio Servicing

## Type:

Lease / Loan Portfolio Servicing

## Description:

Orion First offers the best servicing, collections, and support in the industry. Our business is built around full-service commercial loan, lease, and contract management. Our software is state-of-the-art. Our people are experienced professionals. And frankly, our performance is unrivaled.

Orion's mission is to provide deeper insight, stronger portfolio results, and a highly satisfying borrower experience for small business lenders. We're constantly creating and improving our products and services to align with these goals. And that's why the best small commercial lenders entrust us with the care of their customers and portfolios.

Designed to serve your needs, our tech products succeed in melding actionable insights with intuitive user experience. The result is better portfolio performance. Period.

## Delinquency Manager

Delinquency Manager is a highly customizable dashboard that clarifies trends and factors affecting your portfolio. Filter data by state, originator, industry, and more, so you can better understand what's happening and act swiftly and accurately on your insights.

## Client Portal

Gives you 24/7 access to view, manage, and optimize your customer portfolio—and easily generate and share customized reports.

## Customer Portal

Borrowers can easily make payments, locate contract details, request payoffs, and more. Designed to allow customers to interact the way they want, when they want, the portal gives them a feeling of control and trust in their lender.

## Vendor:

Orion First Financial, LLC  
5403 Olympic Dr NW  
Gig Harbor, WA 98335  
Web Site: [www.orionfirst.com](http://www.orionfirst.com)

## Contact:

Joe Collins  
Phone: (253) 857-9654  
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## Social Media:



<https://www.linkedin.com/company/orion-first-financial-llc/>





# Smart portfolio servicing for smart business growth – combining the power of technology and talent.



## We offer a better solution than software alone.

Our cutting-edge portfolio management technology is backed by skilled customer service teams and managed by experienced professionals. We'll help you improve efficiency, scalability, and customer satisfaction – all without the hassle and cost of building an in-house team. Embrace the future of business growth and partner with Orion First.

- Commercial Loan & Lease Servicing
- Backup Servicing
- Commercial Collections
- Portfolio Analytics
- Client Portal
- Customer Portal
- Portfolio Reporting

SERVING THOSE WHO FUND SMALL BUSINESS  
[ORIONFIRST.COM](https://ORIONFIRST.COM)



# Solifi

## Program Name:

Solifi Open Finance Platform

## Type:

Originations, Portfolio Management, ABL, Factoring, Wholesale, Automotive, Equipment Finance

## Description:

At Solifi, we're reshaping finance technology. Our focus is on strengthening your market position by unifying proven solutions into a singular platform which is built to last, with scalable capabilities that grow with your business.

Commerce is only as strong as the system it runs on. That's why our Open Finance Platform gives you the tools to maximize efficiency and simplify management tasks for your teams and clients, so you can deliver exceptional customer service.

Solifi's award-winning technology can help you:

- Make informed business decisions with tools and data insights
- Improve customer experiences through automated workflows
- Scale your operations quickly and seamlessly
- Utilize the platform to its full capacity with best-in-class integrations

## Recent Enhancements:

Our Open Finance Platform has been designed to anticipate future demands and includes:

- Data streaming, designed to provide near real-time access to data analytics and business intelligence
- Enhanced API-based services to connect disparate systems, gain meaningful insights, and create seamless workflows
- Rapid-launch microservice applications, e.g. pricing, process automation, email
- 24/7 self-service through portals

## System Configuration:

Our architecture is built on an open framework and intuitive, browser-based user interface. We leverage industry-leading technology to help ensure stability,

security, and performance across our Open Finance Platform.

## Comments:

Discover how Solifi technology can unleash your potential at [www.solifi.com](http://www.solifi.com).

## Vendor:

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## Social Media:

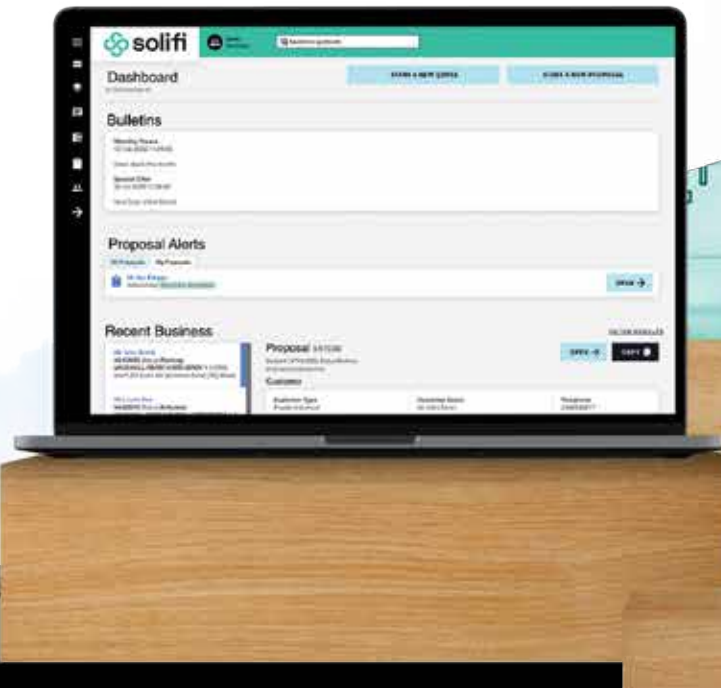


<https://www.linkedin.com/company/solifi-global/>

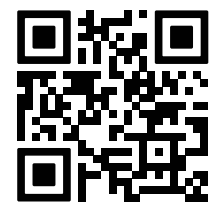


# Mission complete... or mission repeat?

Enter data once and sync  
it across your systems.



**WE WORK HARD SO YOU CAN WORK SMART.**



[solifi.com](https://solifi.com)

# Syndifi, Inc.

## Program Name:

Syndifi

## Type:

CRM, Online Syndication Platform

## Description:

Syndifi is an online syndication platform built specifically for the Equipment Finance industry enabling Buyers and Sellers to transact securely with their trusted partners in the cloud. The Syndifi platform is built to modernize the Syndication process around secure file sharing. Syndifi transforms traditional syndication so Buyers and Sellers can syndicate smarter.

### Platform Features Include:

Individual Deals  
Individual Deal Reports  
Deal Pools  
Deal Pool Reports  
Platform Messaging with email integration  
Deal Activity Dashboard  
Deal Activity Tracking  
Contact Database  
Industry News Resource

### Syndifi Offers:

- Data security protection for secure transactions and the protection of sensitive deal information
- Deal tracking for ultimate deal visibility and to accelerate settlement times
- Deal reports for an organized visual summary to inform and enhance the decision making process
- Built in CRM functions including Buyer company profiles used to match deals with AI tools
- Integration with front and back end systems to limit data input redundancy
- Dual Buyers and Seller roles for syndicators who syndicate as both
- Custom NDA per deal

## Recent Enhancements:

New Document Management System which enables Syndicators to upload complete document folders and all subfolders and files directly from their desktop right into Syndifi with one click of a button. Dealmakers can manage all their folders and files from within Syndifi and securely share with their trusted partners. Saving their partners hours of time using antiquated, unsecure methods like email, encrypted email, or multiple platforms to share sensitive information.

## Vendor:

Syndifi Inc.  
180 North Wacker Drive  
Suite 1  
Chicago, IL 60606  
Web Site: [www.syndifi.com](http://www.syndifi.com)

## Contact:

Alistair Canal  
Phone: (315) 408-3064  
Email: [alistair@syndifi.com](mailto:alistair@syndifi.com)

## Social Media:



<https://www.linkedin.com/company/syndifi-inc/>





# THERE'S A BETTER WAY TO SYNDICATE



Secure Transactions



Document Management



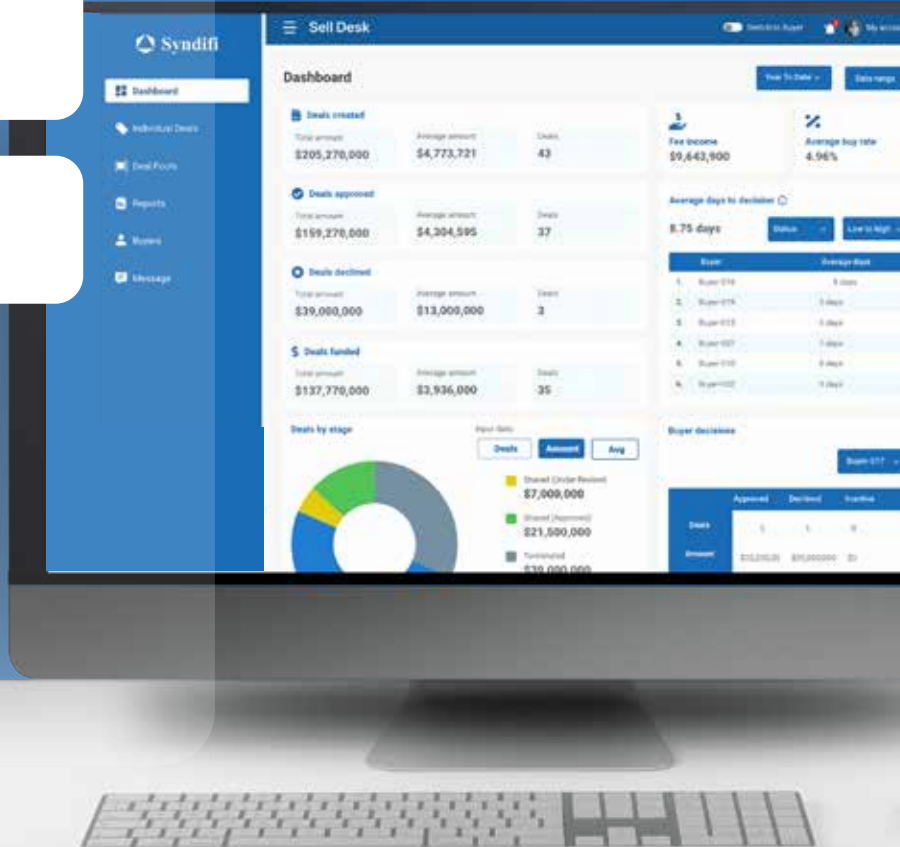
Deal Pools



Deal Reporting



You can't afford to wait to syndicate smarter!



# Tamarack Technology, Inc.

## Program Name:

Tamarack AI Products: Data Console Business Intelligence, AI Automation Predictors, TrailView Customer Self-Service Portal

## Type:

Tamarack's Business Intelligence (BI) workflow automation system enables equipment finance companies to use operational data and AI to manage risk and improve performance.

## Description:

Tamarack's AI products provide productivity improvement and reduce risk-to-capital with business intelligence from the analysis of and learning of financial and operational data. The BI and AI automation products accelerate decision-making and enhance team productivity.

Tamarack's AI products include three primary offerings:

1. Data Console Business Intelligence: All your data in a single location providing comprehensive business intelligence with standard and custom reporting built specifically for equipment finance companies. The Data Console identified actionable next steps that drive productivity from otherwise 'dark data.'
2. AI Automation Predictors: Enable better and more informed credit decisions faster. Predictors can fully automate quantified risk policies to increase the speed at which you create and close deals.
3. TrailView Customer Self-Service Portal: TrailView delivers a single point of collaboration for lessors and customers with 24/7 access to information and streamlines workflows that drives customer-service productivity.

## Comments:

Tamarack is a fintech company providing products and services that enable equipment finance companies to drive performance and growth through digital transformation.

Connect with us via [discover@tamarack.ai](mailto:discover@tamarack.ai) or <https://tamarack.ai/>

## Vendor:

Tamarack Technology, Inc.  
550 Vandalia Street  
Suite 309  
Saint Paul, MN 55114  
Web Site: <https://tamaracknow.ai>

## Contact:

Daniel Nelson, CLFP  
Phone: (651) 269-7680  
Email: [dnelson@tamarack.ai](mailto:dnelson@tamarack.ai)

## Social Media:



<https://twitter.com/tamarackMN>



<https://www.facebook.com/tamarackMN/>



<https://www.linkedin.com/company/tamarack-technology/>





# Use AI to improve productivity and reduce risk to capital.

## Tamarack's Product Suite

Designed specifically for the equipment finance industry, Tamarack's BI and AI products continuously and autonomously accelerate analysis and learning gained from operational data.

Our **Data Console** identifies actionable next steps that drive productivity from otherwise "dark data." All your data in one place allows comprehensive BI to be provided with standard and custom reporting for equipment finance companies.

With **AI Predictors**, companies can enable more informed credit decisions and automate quantified risk policies to increase the speed at which deals are created and closed.

**TrailView™** delivers a single point of collaboration between lessors and customers, offers 24/7 access to information, and streamlines workflows that drive customer-service productivity.

Increase your organization's productivity, reduce operational costs and better manage risk through automation, business intelligence and a quantifiable approach to risk management.

Enable higher customer satisfaction with a self-service experience that produces retention and repeat business.



**Unlock financial intelligence with Tamarack AI.**

888 952 8268 | [Discover@Tamarack.ai](mailto:Discover@Tamarack.ai)

**Tamarack.ai**

**Tamarack.ai**<sup>®</sup>  
Naturally intelligent financial data



# Wolters Kluwer Compliance Solutions

## Program Name:

eOriginal

## Type:

Digital Lending, Electronic asset management

## Description:

Wolters Kluwer Compliance Solutions is a leading provider of digital technology and expert professional services. We offer solutions across the entire equipment leasing and financing lifecycle, including eSign and eContracting, public records search and filing, vehicle titling, and regulatory change management.

ELFA members can benefit from the Wolters Kluwer eOriginal eAsset® Management solution, to streamline the leasing process from the start of financing through the entire transaction lifecycle. With this solution:

- Simplify the loan origination process and pool contracts faster and more efficiently.
- Significantly reduce sales cycles and provide a first-class customer experience.
- Sign and manage loans and leases from the start of financing through collateralization or securitizations; and
- Leverage a solution that has been extensively vetted by major banks enabling this market, as well inside and outside counsel, industry advisors, and investment groups.

The eOriginal platform is used in micro, small, mid, and large ticket equipment leasing companies to enable millions of transactions annually. The technology is also integrated with established leasing channel partners, enabling an end-to-end industry solution.

Members can also benefit from Wolters Kluwer Lien Solutions—the nation’s leading lien services partner and a business within Wolters Kluwer Compliance Solutions and a long term ELFA member. For more than 40 years, Lien Solutions has delivered expert lien services, recording services, and life-of-loan solutions to the equipment lease and financing industry.

Lien Solutions helps customers efficiently and effectively navigate lien perfection and risk reduction. Our focus on public records search, filing, and lien management helps customers focus on the leasing and financing of commercial and industrial equipment—and their own customer relationships.

## System Configuration:

The eOriginal cloud platform is designed for rapid deployment and scale using the latest in Rest API and features modern integration capabilities purpose-built, for equipment lease and finance.

## Vendor:

Wolters Kluwer Compliance Solutions  
100 S. Fifth Street  
Minneapolis, MN 55402 United States  
Web Site:

[www.wolterskluwer.com/en/solutions/eoriginal](http://www.wolterskluwer.com/en/solutions/eoriginal)

## Contact:

Stephen Bradley  
Phone: (612) 554-0116  
Email: [stephen.bradley@wolterskluwer.com](mailto:stephen.bradley@wolterskluwer.com)

## Social Media:

 <https://twitter.com/WoltersKluwerFS>

 <https://www.facebook.com/WoltersKluwerFinancialServices/>

 <https://www.linkedin.com/company/wolterskluwerfs/>



# Simplify the Complex

The road to digitization is here — what is fueling your journey?



We can help you create a fully compliant and secure digital lease and finance strategy — to “start digital and stay digital.”

From digitizing the signing ceremony, to centrally managing your digital assets, to monetizing those assets in the secondary market by sale, collateralization or securitization.

## Wolters Kluwer is your trusted partner

- \$5.7 billion global financial and legal compliance company built on a 185-year legacy, and ELFA member since 2000
- Supports digital lending origination, risk management, lien perfection, UCC filings, ongoing regulatory compliance, and data capture, analytics, and reporting
- Wolters Kluwer Compliance Solutions
  - Acquired market leader eOriginal® in 2020.
  - Integrated Wolter Kluwer Lien Solutions.
  - The most extensive suite of lending compliance tools and products.



Wolters Kluwer can help you advance your digital capabilities, reduce risk, gain cost and efficiencies, improve customer experience, and is at the core of your secure digital lease and finance strategy.



```
elif _operation == "MIRROR_Z":
    mirror_mod.use_x = False
    mirror_mod.use_y = False
    mirror_mod.use_z = True
```

## Get the Latest Software Listings!

The 2023 ELFA Software Guide is your resource for the leading companies delivering software solutions to the equipment finance industry.

To see the latest information updated throughout the year, go to the online software listing at:

[www.elfaonline.org/Directories/Software/](http://www.elfaonline.org/Directories/Software/)

