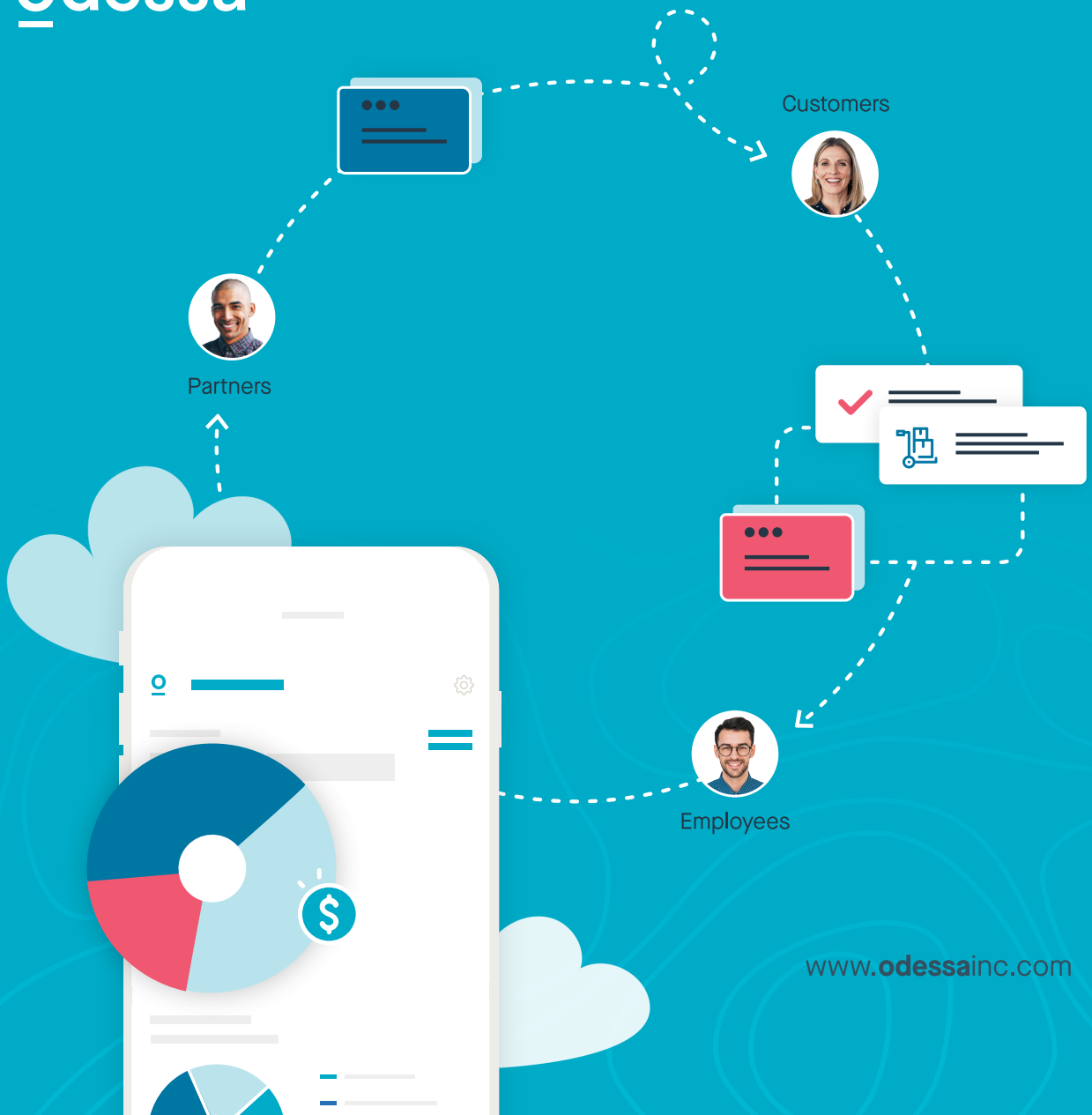
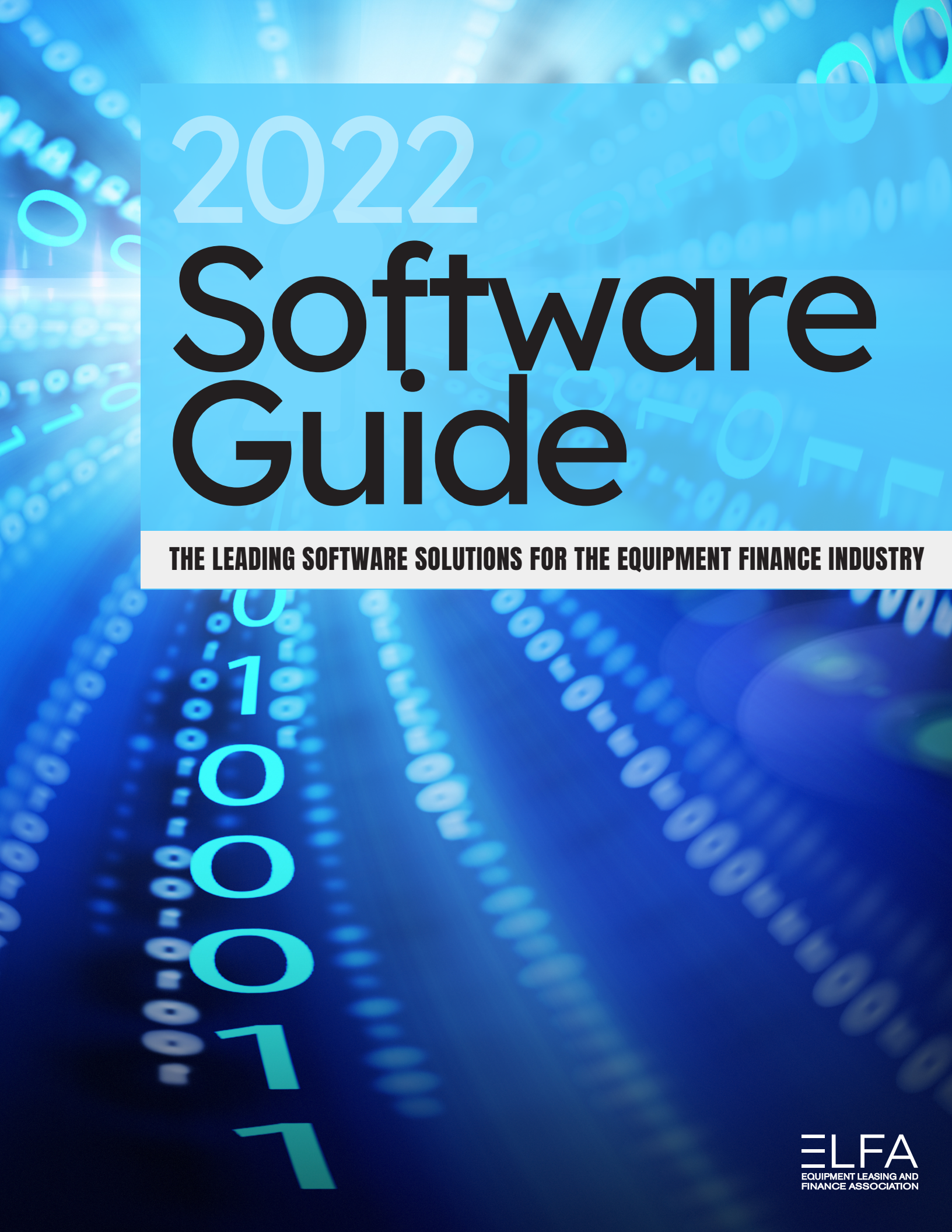
Work(flow) from anywhere

You know how you want your teams to work - the Odessa Platform helps to make it happen. Leverage cross-platform workflow automation, intuitive personalization, and business insights - delivered through full-service SaaS - to unlock asset finance innovation in the cloud. This is fast, frictionless finance.

odessa



www.odessainc.com



2022 Software Guide

THE LEADING SOFTWARE SOLUTIONS FOR THE EQUIPMENT FINANCE INDUSTRY

ELFA
EQUIPMENT LEASING AND FINANCE ASSOCIATION

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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 from ELFA's Operations & Technology Committee, Technology Innovation Workgroup and software service provider members 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.

Sample Scenario

Today's equipment finance companies should be thinking about an ecosystem of technology that can seamlessly integrate. This is sometimes referred to as Composable Architecture. Here is one scenario:

Start selecting your software "from the outside in." Think about: What experiences do you need or want to create for your borrowers? Vendors? Capital Markets Participants? Others? How will you handle all aspects of customer relationship management?

Consider picking a platform that provides robust "wing to wing" CRM capabilities. This may not be your traditional core lease accounting system. Can you configure your CRM to serve all aspects of your front-line employee needs, so they can serve the customer with a single software solution? Pick a core lease accounting system that can integrate with your CRM choice. Are your billing needs straightforward? Perhaps the Core LAS will suffice; if not, you will need to integrate a robust billing platform into your CRM and LAS architecture.

Will you be offering other product capabilities beyond traditional lending/leasing? You may need to select multiple core systems to integrate behind your CRM so you can manage your customer experience uniformly, regardless of which products a customer consumes, and which core the products reside within.

Select a cloud service (e.g., AWS, Azure, Salesforce) to host everything and provide access to new capabilities in the future that you can add to your platform. This is one scenario—select the approach that works best for your business.

A Look Ahead: Opportunities and Risks of New Tech Trends

The equipment finance industry has seen an explosion of technological advances in sales and operations, many of which were accelerated by the pandemic-driven shift to remote work. While specific actions taken in response to the increased role of technology in sales and business operations will vary across equipment finance firms, potential responses include:

- **Reassess how business operations can make better use of existing technological capabilities.** Firms that anticipate having a greater share of their employees working remotely may need to invest in shoring up office communications through web-based collaboration tools, including firm-wide social media platforms or augmented reality videoconferencing software.
- **Consider how best to merge technology and "the human factor" to enhance the sales experience.** Efficiencies from offering online sales channels may need to be balanced with human interventions to maximize sales. Additionally, customer data procured during the sales process can be used to better understand behaviors and preferences. These insights can help firms personalize and target marketing efforts and enhance value propositions.
- **Explore the possibility of using technology to improve employee safety and health in the physical workplace.** As employees transition back to the office (either on a full-time or hybrid basis), some firms are investing in occupancy sensors and monitoring other environment measures such as air quality and infectious particles. Such investments likely weren't on the table prior to the pandemic but may become more common in the future.
- **Continue monitoring developments in emerging technologies,** including artificial intelligence, machine learning, blockchain and robotics, and explore opportunities to incorporate them into sales and business operations to maintain a competitive edge.

It should be noted that the broad adoption of new technologies has opened the door to new cyberthreats, which will require hypervigilance in establishing safety and security protocols.

*Excerpted from the Equipment Leasing & Finance Foundation's 2021 Industry Future Council Report. Download the full report at www.LeaseFoundation.org. **NOTE:** Coming in Fall 2022, a new Foundation study will explore specialized applications, software and information services used by FinTechs that equipment finance companies can implement to transform their businesses. The study will be available at the website referenced above.*

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
- **Innovation Roundtables:** Discover new approaches for tackling your innovation challenges at interactive events from the Tech Innovation Work Group and TomorrowZone. www.elfaonline.org/events
- **Web Seminars:** Get up-to-speed on technology hot topics. www.elfaonline.org/events/elearning/web-seminars
- **Operations and Technology Web Page:** Access articles and research studies from ELFA and the Equipment Leasing & Finance Foundation. www.elfaonline.org/industry-topics/operations-technology
- **Business Technology Performance Index:** This annual study addresses the state of the equipment finance industry from a technology perspective. www.elfaonline.org/data/market-trends
- **Operations and Technology Excellence Award:** This program recognizes innovative uses of technology in the equipment finance industry. 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 and automotive finance industry since 1990.

Our best practice methodologies and specialized knowledge of asset finance mean that we deliver the largest system implementations and most complex business change projects. With an excellent delivery history over our 28 years in the industry, Alfa's track record is unrivalled.

Alfa Systems, our class-leading technology platform, is at the heart of some of the world's largest asset finance companies. Key to the business case for each implementation is Alfa Systems' ability to consolidate multiple client systems on a single platform. Alfa Systems supports both retail and corporate business for auto, equipment, wholesale and dealer finance on a multijurisdictional basis, including leases/loans, originations and servicing. An end-to-end solution with integrated workflow and automated processing using business rules, the opportunities that Alfa Systems presents to asset finance companies are clear and compelling.

Recent Enhancements
Alfa Systems is a fully scalable, enterprise-wide solution that provides end-to-end integration and workflow automation. Setting a new standard for operational excellence, Alfa Systems makes next-generation technologies available today, with an intuitive, highly customizable web-based user interface, easy deployment, and transactional transparency.

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 26 countries served, Alfa has offices all over Europe, Asia-Pacific and the United States.

Vendor:
Alfa
124 E Hudson Ave
Royal Oak, MI 48067
Web Site: www.alfasystems.com

Contact:
Turner Parlin
Phone: (855) 680-7100
Email: *turner.parlin@alfasystems.com*

Social Media:
https://twitter.com/alfasystems

https://www.facebook.com/alfaworldwide

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

Alfa systems

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.

Futureproof your equipment finance.

alfasystems.com

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
- Consumer Finance

iMX is an innovative blend of technologies, enabling 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 multi-lingual and multi-currency solution, which consists of 3 core modules:

- iMX Internal Access for back office operations;
- iMX External Access: self-care web portal for final customers, debtors and business partners;
- iMX Analysis and Decision 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 – USA, UK, France, Bulgaria, Canada, Tunisia, Vietnam, Mexico, Spain, Germany, Austria, Czech Republic, Romania, Morocco, Colombia and Dubai. The company's top-level multi-disciplinary team of over 850 professionals 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:
CODIX LLC
1230 Peachtree Street NE
Suite 1900, PMB 208
Atlanta, GA 30309
Web Site: www.codix.us

Contact:
William Quinn
Phone: (404) 790-0998
Email: *bquinn@codix.us*

Social Media:
https://twitter.com/CODIX_SA

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

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

https://youtu.be/NgJdCi21UhQ

codix

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, Infinity

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.

Originations: Vision Commerce
Vision Commerce is loan origination software tailored to your unique business needs, built by a lending company, for lending companies. Vision's software is designed to grow with your business, and provide solutions to problems you don't even know you currently have. So try us, optimize and streamline your loan origination process with Vision.

Portfolio Management: Infinity
Infinity is your complete back-end lease portfolio management solution. It's available as a standalone solution, or fully integrated for end-to-end lease origination and portfolio management.

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

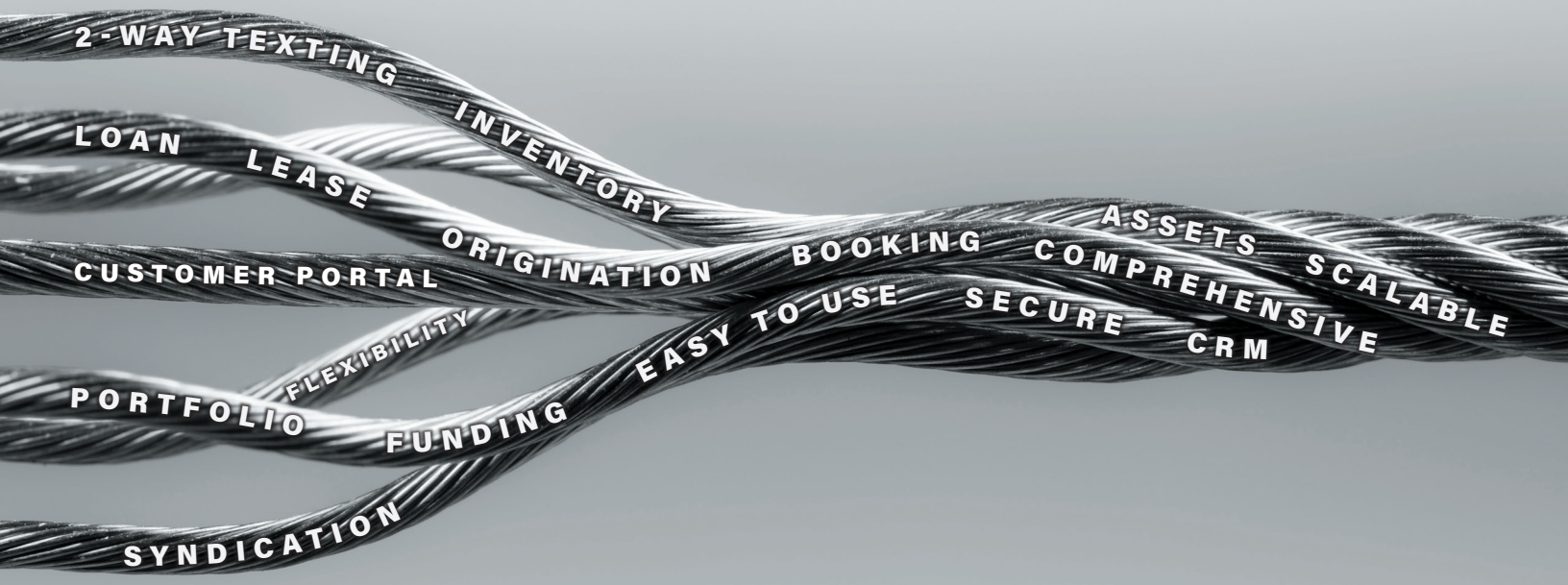
System Configuration:
Vision is a web-based application deployed to the customer in a number of ways based on their needs.

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
690 Dorval Drive
Suite 425
Oakville, ON L6K 3W7 Canada
Web Site: www.constellationfs.com; www.covarity.com; www.visioncommerce.com; www.casitron.com

Contact:
Italo Guerrieri
Phone/Fax: (289) 291-4985/+289-291-4998
Email: *iguerrieri@constellationfs.com*

Financial software built for the way you do business.



Constellation
Financial Software

Seamless Software. Simplified Solutions. Superior Support.

VISION INFINITY CASITRON COVARITY

www.constellationfs.com

Copernicus-USA, LLC

Program Name:
Solar

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

Description:
Solar 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, Solar is the most powerful and technologically advanced solution available. Solar is cost-effective solution for all types and sizes of asset finance organization.

Solar 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.

Solar 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.

Use Solar to process any payment structure, with multiple drawdowns and other complex cash flows, including commissions, subsidies, maintenance, fees and insurance. We believe there is no complexity that Solar cannot manage.

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

Since it uses the latest web technology Solar 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 and suppliers a controlled view of their data within your Solar system.

Recent Enhancements:
Solar 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:
Solar 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
Web Site: www.copernicus-consultants.com

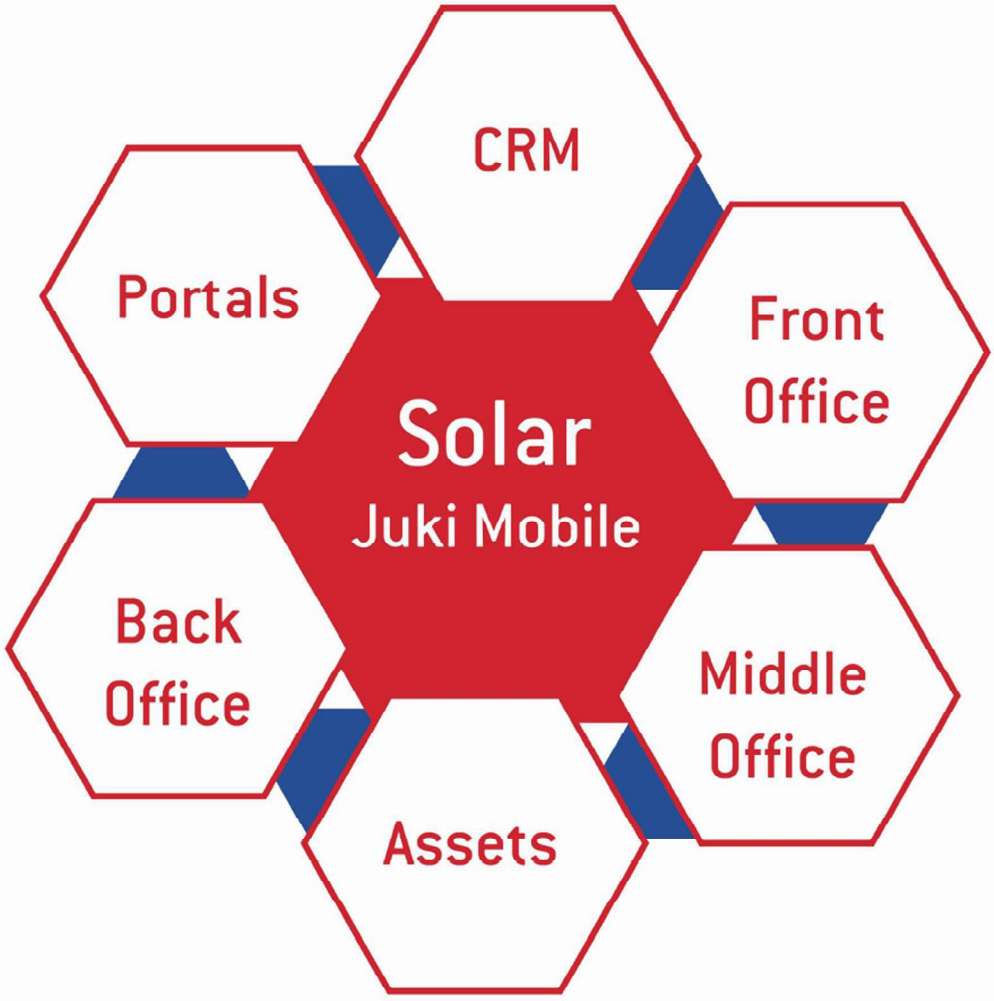
Contact:
Ian Charik
Phone: (312) 919-5002
Email: *ian.charik@copernicus-consultants.com*

COPERNICUS
EMPOWERING ASSET FINANCE

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:
Dominion Leasing Software LLC
1545 Standing Ridge Drive
Powhatan, VA 23139-0550
Web Site: www.domls.com

Contact:
Clinton Dunlow
Phone: (804) 477-8480
Email: *clinton.dunlow@domls.com*

Social Media:
https://twitter.com/dominionls

https://www.facebook.com/dominionls

The Premier End-to-End Equipment Finance Solution

The Dominion CompleteSuite©

- ***LeaseComplete©*** **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©*** **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

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

MADE IN USA SUPPORTED IN

804-477-8480 ◆ ***www.domls.com*** ◆ ***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:
Joe Graham
Phone: (501) 352-2120
Email: *joe.graham@fisglobal.com*

Empowering the Financial World

FIS

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:
Integrated Financial Solutions, Inc.
500 Route 17 South
Hasbrouck Heights, NJ 07604
Web Site: www.IFSLeaseWorks.com

Contact:
Mitchell Kaufman
Phone/Fax: (888) 437-1183/(201) 288-5715
Email: *mitch@IFSLeaseWorks.com*

IFS LeaseWorks

A complete leasing and lending solution

No missing links... IFSLeaseWorks seamlessly supports your entire operation

IFSLeaseWorks provides lease and loan originations, structuring, credit scoring, documentation, booking, contract administration and lease accounting.

- Front-end to Back-end single system for leases and loans
- Customizable screens, fields and user-specific notifications and workflow
- Browser-based interface runs on desktop, tablet or phone
- Web Services for integration with external systems
- Hosted on Amazon AWS or on-premises

RECENTLY ADDED

TWO-WAY SMS TEXT MESSAGING COMMUNICATIONS
ADVANCED WORKFLOW CUSTOMIZABLE FOR EACH USER
INTEGRATED SALESFORCE.COM SALES MANAGEMENT

CONTACT US FOR A DEMONSTRATION

Exceptional software. **Extraordinary** support.

1-888-437-1183 | info@IFSLeaseWorks.com | www.ifsleaseworks.com

Ivory Consulting Corporation

Program Name:
SuperTRUMP, Portfolio Intelligence, Asset Management Solution

Type:
Equipment lease & loan modeling and pricing software and asset management software

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 8i and later.

Vendor:
Ivory Consulting Corporation
325 Lennon Lane
Walnut Creek, CA 94598
Web Site: www.ivorycc.com

Contact:
Scott Thacker
Phone/Fax: (925) 926-1100/(925) 926-1335
Email: *scott.thacker@ivorycc.com*

Social Media:
https://twitter.com/IvoryConsulting

https://www.linkedin.com/company/ivory-consulting-corp./

IVORY SUPERTRUMP

"The Asset Management Solution provides asset managers with an efficient workflow across all aspects of asset management. Thanks to AMS, asset managers are able to track business requests in real-time, improve turnaround time, and produce detailed reports on demand. AMS also provides business security by incorporating internal controls to approval authority. The workflow also allows for improved collaboration between sales and asset management."

Mark Goldman
Vice President
Equipment Finance Group Truist Bank

Leasepath

Program Name:
Leasepath

Type:
CRM, LOS

Description:
Leasepath is the Intelligent Workplace solution for Customer Engagement (CRM) and Origination (LOS) built exclusively for the asset finance industry; serving Banks, Independent Finance, Captive Finance and Brokers. Leasepath is a true Cloud platform that drives origination through an intuitive, configurable, and 100% digital user experience.

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 Determine the Right Lender for a Deal
- Unique Asset Records with Dynamic Fields, Valuations, and Location Tracking
- Automated Credit Pulls and Searches from Partners such as Equifax, Experian, or Microbilt
- 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.

Recent Enhancements
- New automatic Identity Verification and Authentication interface with IDology.
- Bank Statements from multiple funding sources can be saved and summarized in a single view.

System Configuration:
Leasepath is a Cloud-deployed solution for the Dynamics 365 Power Platform. Administrators manage their own tenant, and users access with their Microsoft credentials.

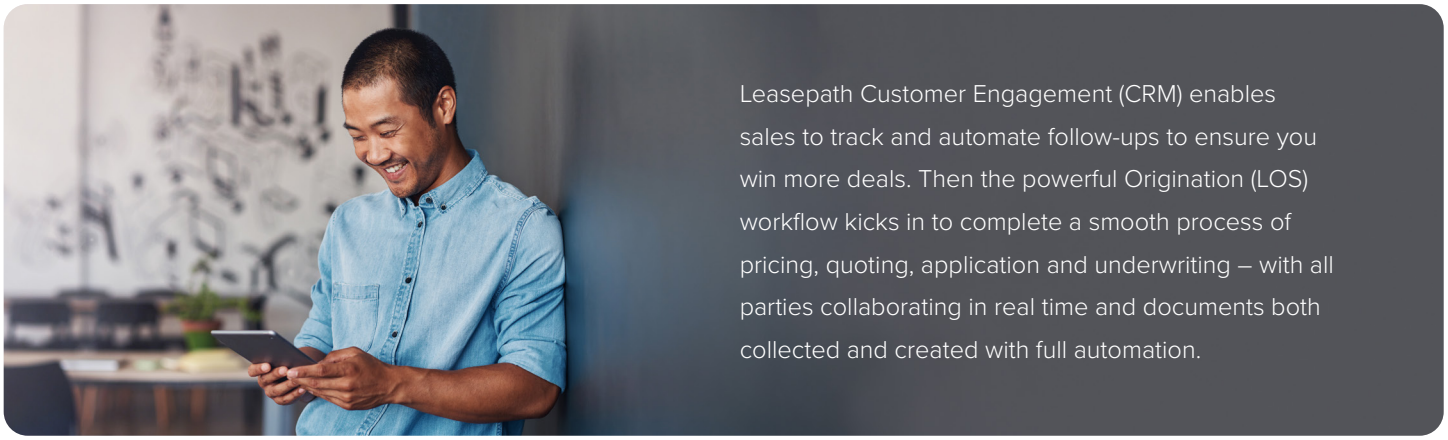
Vendor:
Leasepath
30700 Russell Ranch Road
Westlake Village, CA 91362
Web Site: www.leasepath.com

Contact:
Sean Scampton
Phone: (651) 603-4491
Email: *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.**



Leasepath Customer Engagement (CRM) enables sales to track and automate follow-ups to ensure you win more deals. Then the powerful Origination (LOS) workflow kicks in to complete a smooth process of pricing, quoting, application and underwriting – with all parties collaborating in real time and documents both collected and created with full automation.

Lead Management | **Origination Workflow** | **Credit Adjudication** | **Document Automation** | **Analytics & Reporting** | **Digital & Mobility** | **Data Security & Audit** | **Custom Portals**

Win More

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

Risk Less

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

Profit More

- 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

Microsoft | Microsoft Dynamics 365 | SharePoint | Office 365 | Power BI

© 2020 Leasepath |

Linedata Lending and Leasing

Program Name:
Linedata Ekip360

Type:
Front, Middle and Back Office Automation for Leasing & Lending

Description:
Close deals faster, manage risk, offer a fully digital customer experience and grow your business.

Linedata Ekip360 is a robust financing software solution built specifically for equipment financers and automotive lenders and lessors, consumer lenders and commercial financers. Modular front, middle and back office solutions can standalone and integrate with your existing credit ecosystem or be combined to create a seamless end-to-end experience.

From client acquisition to contract completion, Linedata Ekip360's fully configurable workflows drive contracts from origination to funding with particular attention to risk management and due diligence activities. Post-close, Linedata Ekip360 acts as a full Contract Management System, monitoring payments and account changes, supporting full-service contracts, managing insurance claims and handling early termination or contract extension and so much more.

Linedata Ekip360 is natively a multi-entity, multi-language, multi-currency, multi-country platform so you can grow without limitations.

Recent Enhancements
Unmatched flexibility allows you to run business your way. With more than 1000 APIs for integrations with the third-parties vendors of your choice and configurations available at every step, you can create your perfect credit ecosystem. You can provide your customers with a mobile experience with Linedata Mobil'Ekip, or leverage our webservices to make use of your own portal or app for payments and home banking convenience.

System Configuration:
The Linedata implementation methodology is based on workflow best practices developed at world-class financial institutions. Linedata's products allow financial institutions to streamline existing business processes and information flows, replacing inefficient paper-based or free-standing processes with a fully integrated straight-through-processing lending and leasing solution.

Vendor:
Linedata Lending and Leasing
1111 3rd Ave
Suite 950
Seattle, WA 98101
Web Site: www.Linedata.com/linedata-ekip360

Contact:
Tay Shah
Phone: (800) 827-2010
Email: *Tay.Shah@na.linedata.com*

Social Media:
https://twitter.com/linedata

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

Linedata

Drive your business with efficiency, diligence and risk management. Linedata Ekip[360] 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 or visit 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 leasing automation

Type:
End to End business process automation

Description:
Today's digital world allows your businesses to harness the power of automation and data to build cutting-edge tools. Give your business a competitive edge with custom-built leasing technology solutions.

Phase 1: Application & Discovery Processing
Experience the power of pulling external data from multiple sources within seconds.
- Discussion Board
- Credit Inquiries
- Asset Analysis
- Real-time Commission Calculations
- Background Check
- Equipment Financing Application

Phase 2: Underwriting
Your sales and credit managers need to review highly accurate, detailed insights. Help your credit team spot potential red flags and increase the quality of your approvals.
- Review Transactions and Key Qualifying Criteria:
- Credit Packages
- Vendor Profile Analyses
- Deal Versioning
- Incident Reports
- Vendor Metrics
- Equipment Vendor & Asset Assessment
- Term Set Versioning/Deal Changes
- Background Check
- Default & Recovery Data

Phase 3: Booking & Funding Integration
Liventus booking and funding solutions manage large amounts of it effortlessly.
- Manage Your Lease Portfolio:
- Lease Booking
- Funding Source Profile
- Funding Source Submission
- Sales and Use Tax Compliance

Phase 4: Asset Management
Need to recover an asset? Not a problem. We know how to track it, reduce your losses, and help your team get it back efficiently.
- Quickly Assess, Review, and Track:
- Original Lease
- Asset Images
- Asset Summary
- Equipment Location
- Key Dates Summary
- Gain/Loss Summaries
- Remaining Book Value
- Legal Documentation
- Key Dates

Phase 5: Business Intelligence
Data is key to making sharp business decisions. That's where we help push your businesses to the next level by providing our business intelligence solutions.
- Gain deeper insights to your leasing business:
- Financial Performance Metrics
- Sales Rep Performance
- Employee Productivity
- Insurance Tracking
- Equipment Vendor Metrics Analysis
- Key Indicator Trending Analysis
- Vehicle Title Tracking

System Configuration:
We program primarily in the Microsoft tech stack and have extensive experience customizing platforms like Salesforce and MS Dynamics.

Comments:
We have been building leasing automations for nearly 20 years.

Vendor:
Liventus, Inc.
3400 Dundee Road, Suite 180
Northbrook, IL 60062
Web Site: https://www.liventus.com

Contact:
Danielle Dolloff
Phone: (847) 443-2593
Email: *ddolloff@liventus.com*

Social Media:
https://twitter.com/Liventus

https://www.facebook.com/Liventus

https://www.linkedin.com/Liventus

Liventus

Leasing Automation

Turn arduous into effortless and unreliable into meticulous.

WE CAN HELP YOU AUTOMATE YOUR LEASING PROCESS

Redundant and laborious tasks are expensive, inefficient, and prone to mistakes. Liventus can help you grow beyond your current capacity by building custom tools to automate your lease process.

APPLICATION & DISCOVERY PROCESSING

- Equipment Financing Application
- Credit Inquiries
- Incident Report
- 3rd Party Bank Statements
- IRS Tax Return
- Asset Analysis
- Real Time Commision Calculation
- Discussion Board

UNDERWRITING

- Term Set Versioning/Deal Change
- Background Check
- Vendor Metrics
- Default & Recovery Data
- Equipment Vendor & Asset Assessment
- Incident Report

BOOKING & FUNDING INTEGRATION

- Lease Booking
- Funding Source Submission
- Funding Source Profile
- Sales and Use Tax Compliance

ASSET MANAGEMENT

- Asset Summary
- Asset Images
- Legal Documents
- Remaining Book Value
- Original Lease
- Tracking Log
- Key Dates Summary
- Gain/Loss Summary

BUSINESS INTELLIGENCE

- Financial Performance Metrics
- Sales Rep Performance
- Employee Productivity
- Insurance Tracking
- Equipment Vendor Metrics Analysis
- Key Indicator Trending Analysis
- Vehicle Title Tracking

Liventus www.liventus.com | 3400 Dundee Road, Suite 360, Northbrook, IL 60062 | 855.345.1395

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 and customer-obsessed global company that works with enterprises throughout the US, UK and Canada. We take a partnership approach. With a 32+ year history supporting the equipment finance and asset-based lending industry, we bring a level of commitment to our customers that allows them to create a full technology ecosystem that can scale with them and bring efficiencies to support their growth.

ASPIRE is a robust platform that handles lifecycle management with straightforward scalability. And 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, which allows operations to do more.

Recent Enhancements
The ASPIRE platform provides cutting-edge functionality for the entire lifecycle of an equipment finance or asset based contract on one system and continues to evolve using the latest Microsoft technologies.

LTi's flexible architecture provides the ability to scale as a business grows - one system, ultimate flexibility. We have a large percentage of the Bank 50 and Independent Bank 25 as our customers and more than 120 are hosted in the LTi Cloud for 14+ years.

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

Comments:
Contact Sales at (402) 493-3445.

Randy Haug
Email: *rhaug@ltisolutions.com*

Tara Aasand
Email: *taasand@ltisolutions.com*

Bryan Hunt
Email: *bhunt@ltisolutions.com*

Vendor:
LTi Technology Solutions
4139 S. 143rd Circle
Omaha, NE 68137
Web Site: www.ltisolutions.com

Contact:
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Phone/Fax: (402) 493-3445/(402) 493-3433
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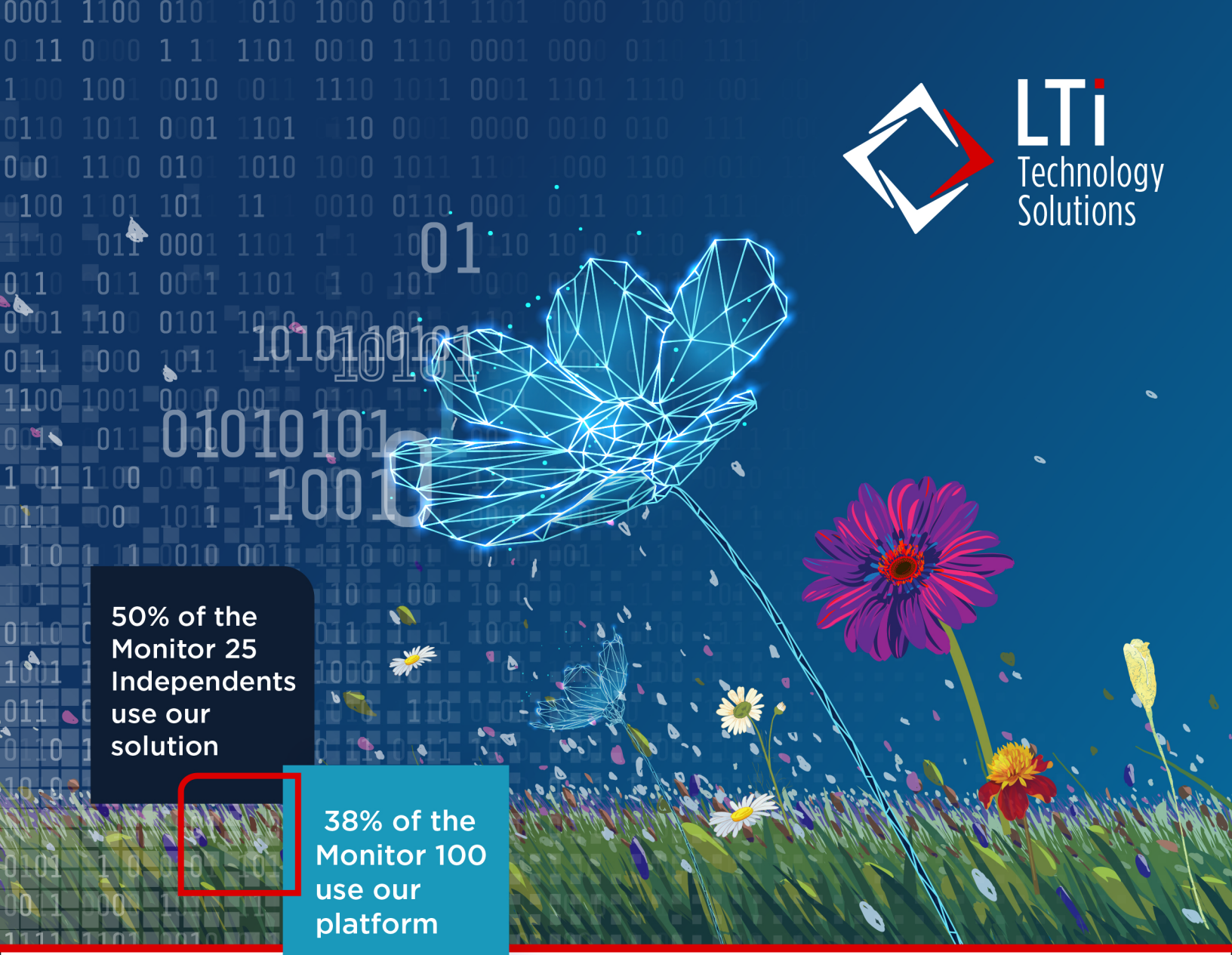
https://www.linkedin.com/company/lti-technology-solutions/



Digital Transformation

Our Lease & Loan Finance Technology Ecosystem is ready. Are you?

LTi Technology Solutions is a customer-obsessed, cloud-centric, global software technology platform that has been supporting the equipment financing, lease and loan industry for over 34 years. **The trusted choice of top financial institutions.**

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

NETSOL Technologies

Program Name:
Ascent, Digital

Type:
Omni-Channel Credit Origination, Lease/Loan Management, Wholesale Floorplan Financing

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.

NFS Ascent is an adaptive & proven platform for the evolving global equipment finance & leasing industry. It is built on cutting-edge, modern technology that enables companies to run their retail & wholesale finance business with ease. Ascent is architected to empower finance & leasing companies with a platform that supports their growth in terms of business volume & transactions.

NETSOL takes pride in being the first organization in the industry to offer a full suite of digital solutions. NFS Digital is an ecosystem that augments & enhances finance & leasing operations. It leverages the benefits of superior digital solutions across various touchpoints which can be integrated with any back-end system.

Recent Enhancements
NFS Ascent is now available on the cloud with rapid deployments & flexible, subscription-based pricing.

NETSOL's subsidiary Otoz, a B2B new mobility technology start-up, provides solutions ranging from equipment sharing & subscription products to AI-enabled chatbots, allowing businesses to engage consumers & facilitate the complete transaction lifecycle intelligently & digitally.

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.

NETSOL's scalable solutions empower clients to effectively manage their complex multi-site & multi-currency operations & enable them to thrive in hyper competitive markets globally.

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
23975 Park Sorrento • Suite 250
Calabasas, CA 91302
Web Site: www.netsoltech.com

Contact:
Haider Naqvi
Phone/Fax: (818) 222-9195/(818) 222-9197
Email: *haider.naqvi@netsoltech.com*

Social Media:
https://twitter.com/netsoltech

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

https://youtu.be/sglnCHoY59U

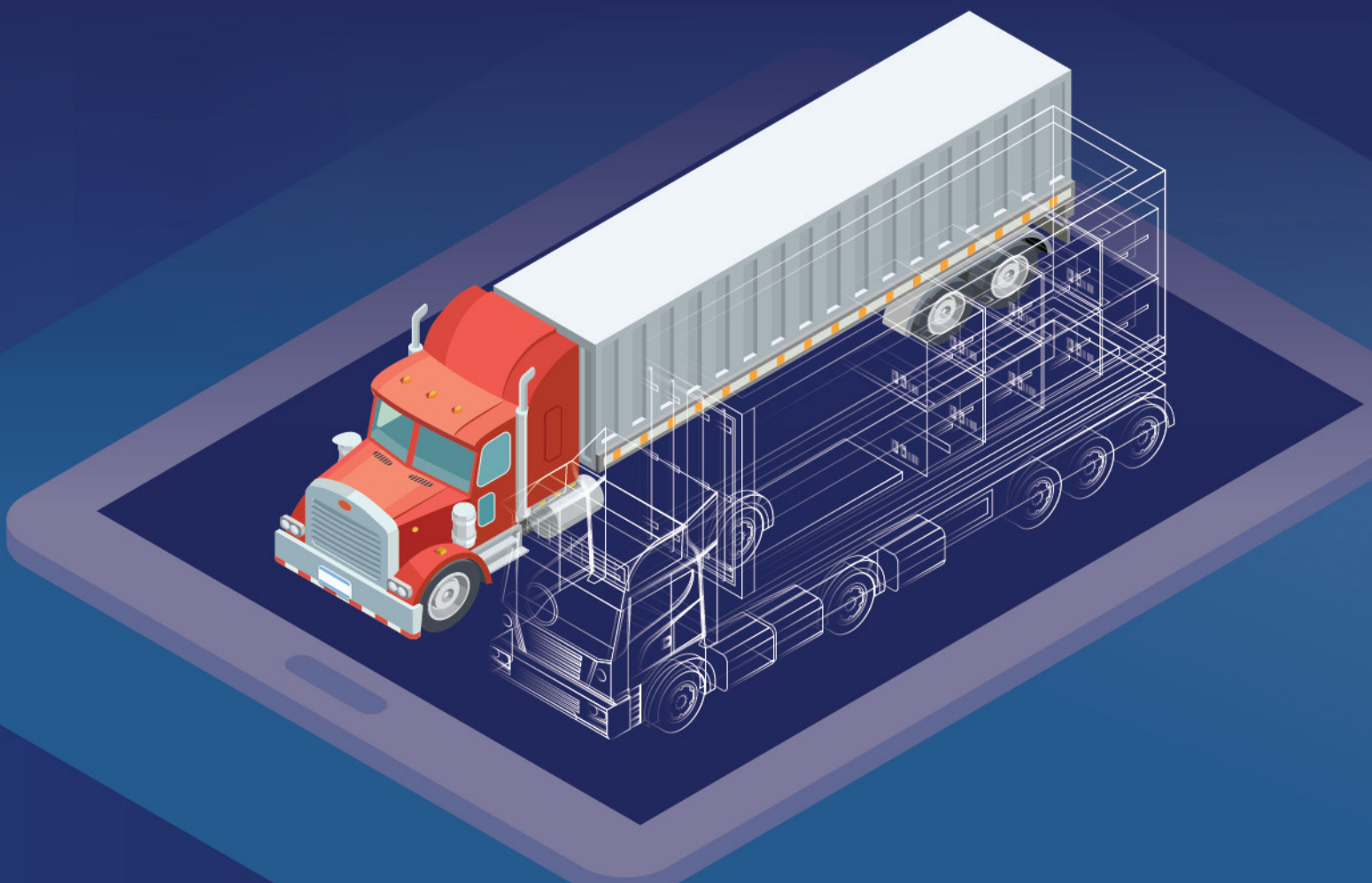
NETSOL

NETSOL

2022 MOST monitor INNOVATIVE SUSTAINING

Digital Innovation for Equipment Finance & Leasing

Agility is the driver for growth. With our team of over 1300 professionals, we help you adapt to the needs of your customers so that your business is always ready for the future.



www.netsoltech.com

Northteq

Program Name:
Aurôra - Origination & Portals

Type:
Loan Origination System (LOS)
Partner Portal
Customer Portal

Description:
Aurôra simplifies the way you originate leases and loans through efficient and automated process flows, making lending easier than ever before. Whether you use our end-to-end loan origination system, need a partner portal to integrate with your vendors or need a customer portal to better service your customers, Aurôra is the complete solution.

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

- Automate your workflow from application to funding
- Intuitive UX
- Auto decisioning
- Originate, score, decision, and document your deals in minutes

Aurôra's intuitive customer and partner portals seamlessly integrate with your existing LOS, giving you complete control over the capabilities and information you share with your vendors, brokers, partners, and customers. Gain actionable insight into your business with Aurôra.

- Connect to your existing LOS for easy access to real-time account and customer data
- Complete control of the data and capabilities you share
- Ability to pay invoices from any device
- Self- service notifications

Recent Enhancements:
Full automation end-to-end from app entry through to funding including SOS automation.

System Configuration:
Salesforce.com is a 100% cloud based open architecture.

Comments:
For more information, please send us an email at *info@northteq.com* or visit us at www.northteq.com.

Vendor:
Northteq
701 N 3rd Street • LL001
Minneapolis, MN 55401
Web Site: https://northteq.com/

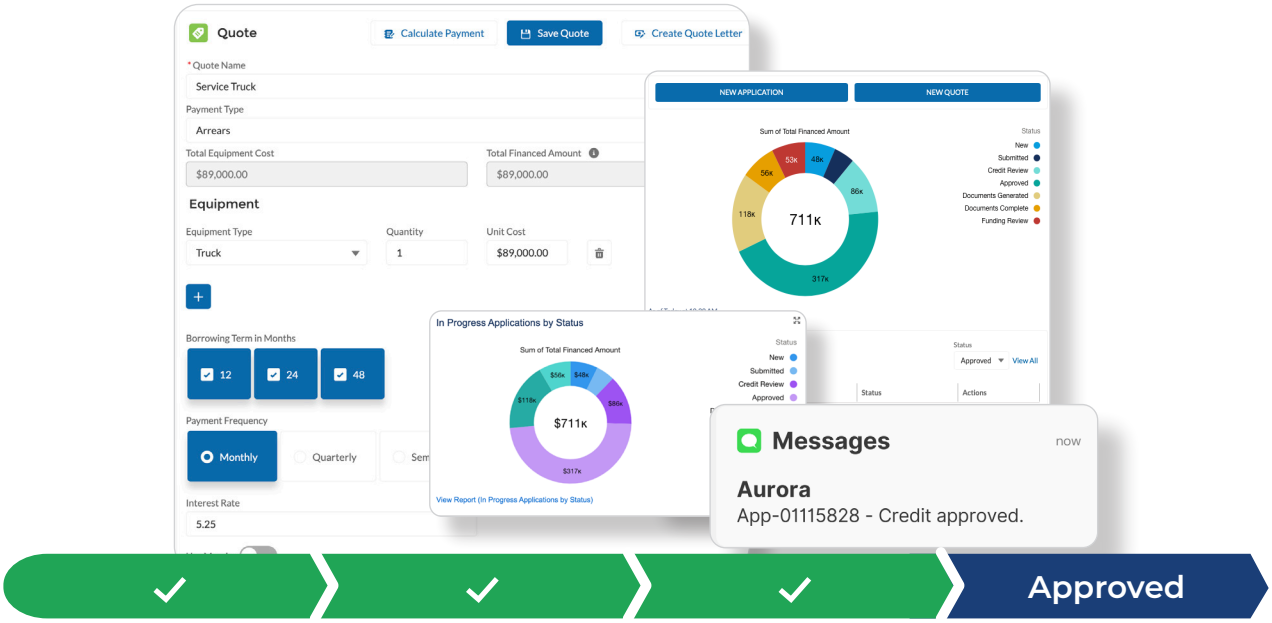
Contact:
Kristian Dolan, CLFP
Phone: (612) 483-1210
Email: *kdolan@northteq.com*

Social Media:
https://www.facebook.com/northteqinc

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

aurôra

origination & portals



automate origination to funding.

Aurôra simplifies the way you originate leases and loans through efficient and automated process flows, making lending easier than ever before. Whether you use our end-to-end loan origination system, need a partner portal to integrate with your vendors or a customer portal to better service your customers, Aurôra is the complete solution.

- loan origination system
- partner portal
- customer portal

northteq

request a demo info@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 950 professionals across North America, Europe, LATAM and Asia Pacific, Odessa has a 23-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 expanded pay-per-use capability, IoT-ready component-level asset tracking, integrated business intelligence in dashboards, expanded APIs, 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
50 S. 16th Street • Suite 1900
Philadelphia, PA 19102
Web Site: www.odessainc.com

Contact:
Keelie Fitzgerald
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Email: *keelie.fitzgerald@odessainc.com*

Social Media:
https://twitter.com/OdessaTech

https://www.facebook.com/OdessaInc

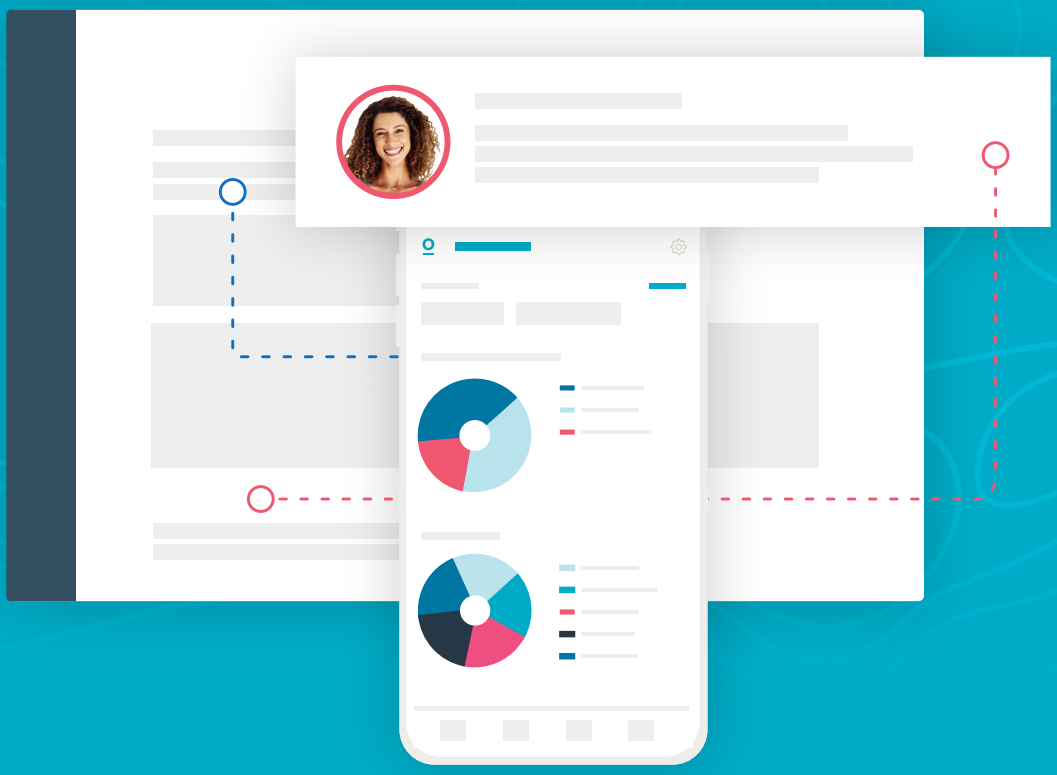
https://www.linkedin.com/company/odessa-inc-/

odessa

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

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

Contact:
Joe Collins
Phone: (253) 857-9654
Email: *jcollins@orionfirst.com*

Social Media:
https://www.linkedin.com/company/orion-first-financial-llc/

Performance is about having the right tools and the right team, at your service

Orion First offers the best servicing, collections, and support in the industry.

As your managers of risk, every person we hire, every service we offer, and every product we develop is aimed at fulfilling our mission: to provide deeper insight, stronger portfolio results, and a highly satisfying borrower experience for small business lenders.

Those are our standards and here are some of the tools we've developed to meet our mission:

Client Portal—view, manage, and optimize your customer portfolio, view customer service and collection notes, and easily generate and share customized reports.

Delinquency Manager—a highly customizable dashboard that clarifies trends and factors affecting your portfolio.

Customer Portal—borrowers can easily make payments, locate contract details, request payoffs, and more.

OUR SERVICES

- Commercial loan & lease servicing
- Backup servicing
- Commercial collections
- Portfolio analytics

SERVING THOSE WHO FUND SMALL BUSINESS
ORIONFIRST.COM

ORION FIRST

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Solifi

Program Name:
Solifi Open Finance Platform

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

Description:
Formerly known as IDS, William Stucky & Associates, and White Clarke Group, we are now Solifi – and we deliver a solid financial technology foundation for equipment, working capital, wholesale, and automotive finance firms.

At Solifi, we believe that commerce is only as strong as the system it runs on. Our mission is to reshape finance technology by bringing together proven solutions into a singular powerful technology platform that helps you protect and scale your business.

With our secured open finance platform, we simplify management tasks for your teams and clients, delivering a reliable, exceptional customer experience via powerful, accessible capabilities. With Solifi technology, you can:

- Get the tools and data insights to make better business decisions
- Scale up operations quickly and deploy changes without disruption
- Automate workflows and improve customer experiences
- Expand the power of the platform with best-in-class integrations

Recent Enhancements:
We recently enhanced our open finance platform to align with what our customers need to anticipate future demands. These enhancements include:

- A data streaming platform service, 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
- SaaS-enablement of newly-acquired solutions

System Configuration:
Our architecture is built on a modern, 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:
To learn more about how Solifi technology can help you realize your potential, visit www.solifi.com.

Vendor:
Solifi
220 South Sixth Street
Suite 700
Minneapolis, MN 55402
Web Site: https://www.solifi.com

Contact:
Ray Wizbowski
Phone: (612) 851-3200
Email: *RWizbowski@solifi.com*

Social Media:
https://www.linkedin.com/company/solifi-global/

Commerce is only as strong as the system it runs on.

EQUIPMENT FINANCE
WORKING CAPITAL
AUTOMOTIVE FINANCE
FLOORPLAN FINANCE

IDS & WHITE CLARKE GROUP ARE NOW SOLIFI

At Solifi, we believe commerce is only as strong as the system it runs on. Our mission is to reshape finance technology by bringing together proven solutions into a singular powerful technology platform that's designed to help you protect and scale your business. We guard your company by being precise and reliable, we use proven solutions to guide you to the right opportunities, and we help you grow by unleashing the potential of your business.

solifi
TECHNOLOGY THAT UNLEASHES POTENTIAL

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:
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Chicago, IL 60606
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Contact:
Alistair Canal
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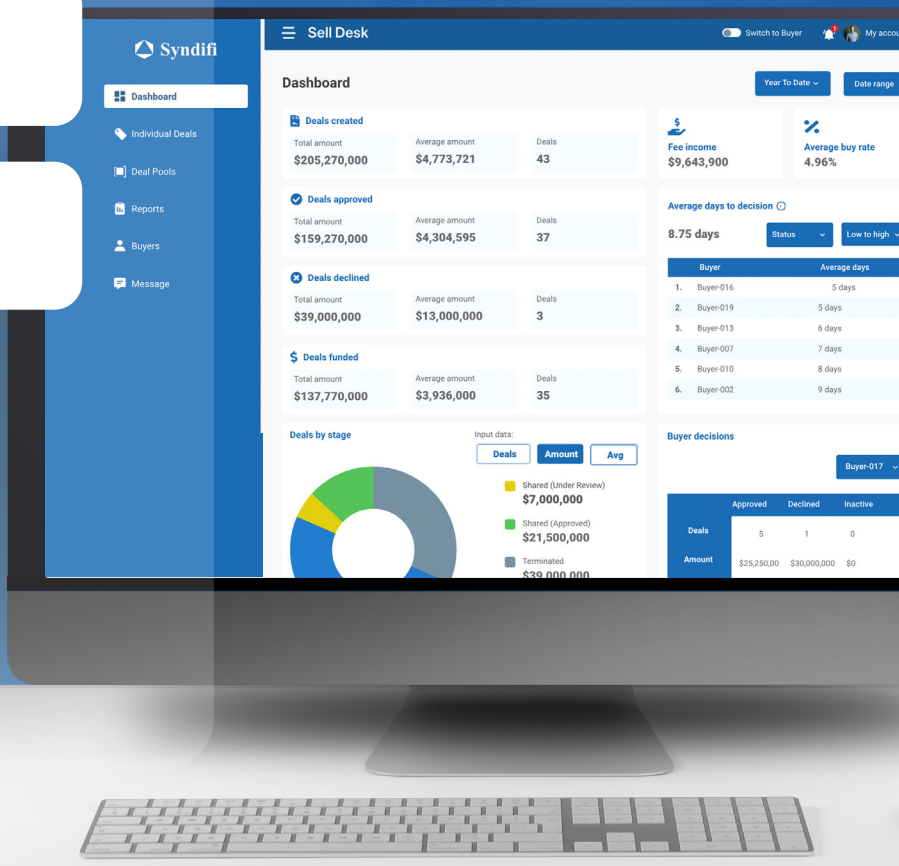
Social Media:
https://www.linkedin.com/company/syndifi-inc/

THERE'S A BETTER WAY TO SYNDICATE

- **Secure Transactions**
- **Document Management**
- **Deal Pools**
- **Deal Reporting**

salesforce

You can't afford to wait to syndicate smarter!



Syndifi

WWW.SYNDIFI.COM | INFO@SYNDIFI.COM

Tamarack Technology, Inc.

Program Name:
Data Console, Predictors, Customer Support Self-Service Portal, EaaSiWare

Type:
Operational data-centric software and integrations including machine learning and AI

Description:
Tamarack's AI platform provides continuous productivity improvement and reduces risk-to-capital with analysis of and learning from financial and operational data. The platform streamlines decision-making and reduces risk by leveraging business intelligence and AI automation.

Tamarack's AI business intelligence platform includes three primary offerings:

1. Data Console: See all your data in a single location. Leverage analytics, intel and reporting to create actionable next steps that drive productivity from otherwise 'dark data.'
2. Predictors: Make better and more informed credit decisions faster. Automate financial decisions and operational preferences to increase the speed at which you create and close a deal.
3. Customer Support Portal Services: Create a single point of collaboration for lessors and their customers. Provide customers with 24/7 access to information, to streamline workflow and increase customer-service productivity.

EaaSiWare™ software solutions make equipment finance accounting and operations more productive, more competitive and more innovative by providing access to and automation between LOS, portfolio management and equipment finance software ecosystems.

The EaaSiWare™ product family includes four solutions:

1. BridgeWare allows you to build and implement enterprise-wide, real-time access to back-office data easily and efficiently.
2. Automation Utilities improve the productivity and capability of lease accounting platforms and of the teams who manage lease portfolios.
3. Lease Management System Connectors integrate 3rd party solutions into the enterprise accounting platforms for tax compliance, identity tracking and insurance.
4. Analytics tools provide additional access to and analysis of data enterprise lease accounting platforms.

Comments:
Tamarack is a fintech company providing software and services that enable equipment finance companies to drive performance and growth through digital transformation. Connect with us via *discover@tamaracknow.com* or www.tamaracknow.com

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Tamarack™

Create the future
with Artificial Intelligence

Designed specifically for the equipment finance industry, Tamarack AI continuously and autonomously helps reduce capital risk through analysis and learning gained from operational data.

Tamarack's AI platform collects and aggregates data across an organization's digital systems and organizes it in a single data mart. With this data, AI improves operational workflows and automates approvals.

Leverage data to differentiate your business and elevate competitive advantages that drive more value for customers.

By empowering innovators, we help them understand the risks associated with change. Embrace risk with AI and create true business innovation.

Unlock financial intelligence with Tamarack AI.

Tamarack's AI Platform

Enable your team to learn from past and present data, use AI to predict future outcomes that streamline decision-making with quantified risk strategies and help better serve your customers.

Data Console™

- View all your data in a single location
- Leverage analytics, intel and reporting to make business-driven decisions
- Gain productivity insights from otherwise 'dark data'
- Improve partner deal matching efficiency and precision

Predictors™

- Make better, more informed credit decisions faster
- Build future portfolio returns by selecting the right deal mix
- Use your data to increase the speed and confidence with which you implement market strategies

888 952 8268 | Discover@TamarackNow.com

TamarackNow.com

Tamarack.ai™

Naturally intelligent financial data

Get the Latest Software Listings!

The 2022 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/

ELFA
EQUIPMENT LEASING AND FINANCE ASSOCIATION