

TRY IT NOW! 



IvyTek
FINANCE

Loan Management
Software at Your Fingertips.





In sync with your business goals.

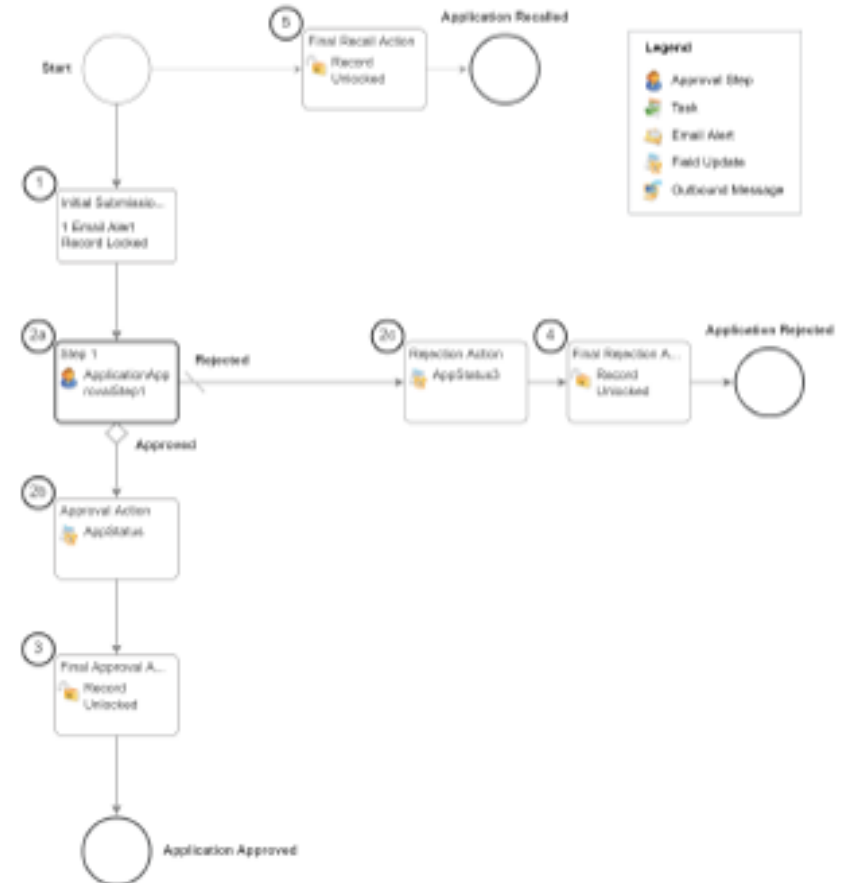


With **over 20 years in the non-bank finance business**, our consultants can customize the LMS (Loan Management System) to adapt as your business grows.



A Loan Management System that makes your life easier.

A complete Loan Management system that handles Loan Origination and Loan Servicing in one system.





**IvyTek Finance can do all
consumer finance loan transactions.**



We've got you covered
with multiple loan types:
Single Payment,
Installment, Revolving Line
of Credit & Interest Types:
Rule of 78, Simple Interest,
Average Daily Balance.



Our Loan Management software can be modified to meet your needs.

We can
quickly add
custom reports
or other special
features to fit
all of your
requirements

The screenshot shows the IvyTek Finance web application. The top navigation bar includes a search bar, user information (Text User2), and links for Setup, Help & Training, and Finance. Below this is a secondary navigation bar with tabs for Home, Chatter, Customers, Drawers, Checkbooks, Statements, Reports (highlighted), and Dashboards. The main content area is titled 'Create New Report' and features a 'Select Report Type' section with a search bar and a list of report categories: Accounts & Contacts, Activities, Administrative Reports, File and Content Reports, and Other Reports. To the right is a 'Preview' section showing a table for an 'Account Report'.

Account	Owner	Account Name	Account Title
Joe Johnson	Acme, Inc		Headquarters
Shelly Smith	Corwall, Inc		Headquarters
Sam Thompson	Gene Ports		Headquarters

At the bottom right of the interface are 'Cancel' and 'Create' buttons.



The loan application is the core module to the loan process.

IvyTek Finance

Test User2 Setup Help & Training Finance

Search

Home Chatler Customers Drawers Checkbooks Statements Reports Dashboards

New Customer Application

Next Cancel

Customer Information

Loan Type: Payday Loan
Application Status: Pending
Amount Required:
Fund Type: Cash
Initial Application Date: 3/28/2017
Preferred Repayment Type: In Store

Loan Location: Solutions

Borrower Information

Solution: --None--
First Name:
Last Name:
SSN:
Date of Birth (MM/DD/YYYY):
Mailing Street:
Home Phone:
Cell Phone:
Other Phone:
Mailing City:
Mailing State/Province:
Mailing Zip/Postal Code:

The loan application allows originators to quickly take applications from online or inside the local office.



Term Comparison

The Term Comparison feature lets you determine the best loan term to meet your customer's budget.

Loan Contract-0008

[Loan History \(0\)](#) | [Collaterals \(0\)](#) | [Notes & Attachments \(0\)](#) | [Transactions \(1\)](#)

[Customize Page](#) | [Printable View](#) | [Help for this Page](#) ?

[Edit](#) [Delete](#) [Charge Fee](#)

Loan Detail

LoanID	Contract-0008	Owner	Mike Griggs [Change]
Application	APP-0010	Set Up Date	3/2/2017
Customer Name	George Hebert	First Due Date	4/2/2017
Account Status Code	New	Current Due Date	4/2/2017
Loan Type	Consumer Discount	Promise Date	4/2/2017
Record Type	Consumer Loan [Change]	Date Status Changed	
		Status Change Effective Date	3/2/2017
		WO Date	
		Interest Free Date	
		Principal Free Date	
Request Amount	\$1,000.00	Loan Date	3/2/2017
Amount Of Check	\$1,000.00	Mat Date	3/2/2018
Refinanced Amount	\$0.00	Date Last Collected	3/2/2017
Amount Financed	\$1,124.00	Amount Last Collected	\$112.75
Top Of Note	\$1,353.00		
Principal	\$1,004.00		
Finance Charge	\$329.00	Days Late	0
Origination Fee	\$0.00	Late Fees Due	\$0.00
Document Fee	\$20.00		



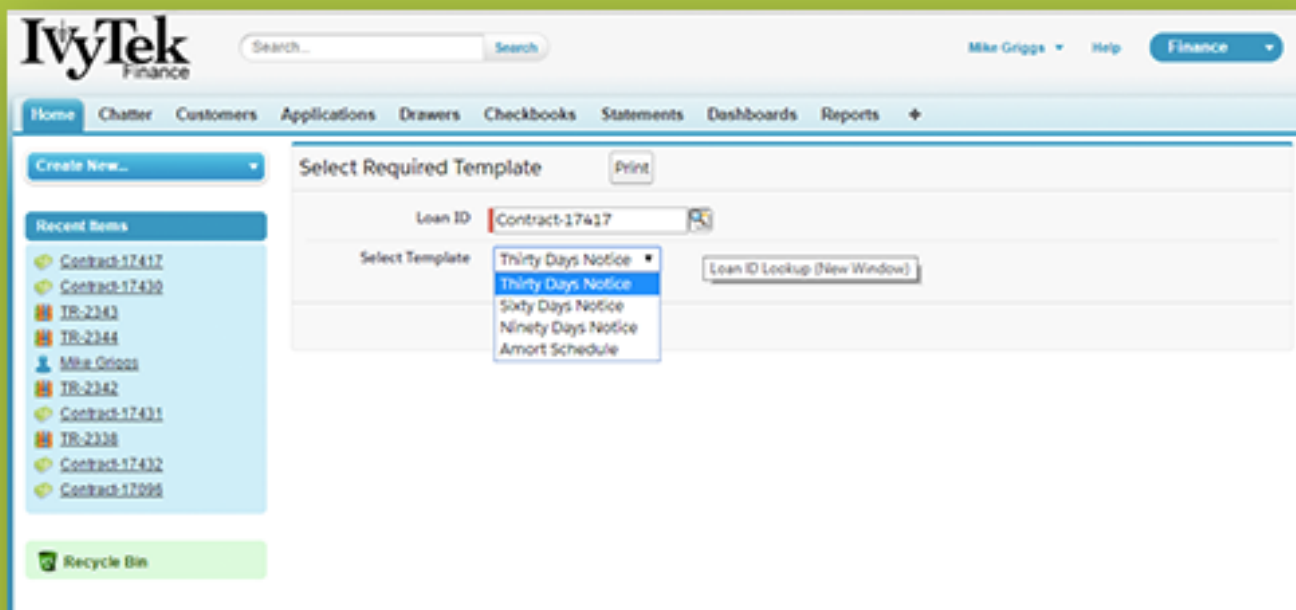
Get important messages to your customers with the Solicitation Feature.

Effortlessly create, name and store your own custom letters that can be selected and printed for any customer.





Collection Workflow Actions



Track all
CSR actions
with custom
collection
workflow
actions!

Automated collection workflows with SMS, Emails, and letters such as welcome, past due notices and statements. Track Collection CSR Actions with Reports and Dashboards, gaining valuable insights into your collection efforts.



Easy Maintenance....

Easily manage
all your
quotes,
applications,
loans and
payments with
the click of a
button.

CheckBook CBK-0001

[Customize Page](#) | [Printable View](#) | [Help for this Page](#) ?

[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [CheckBookDetails \(4\)](#)

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit for Approval](#)

Owner [Mike Griggs \(Change\)](#)

CheckBook Detail

CheckBookID	CBK-0001
Description	☒ Default Checkbook
CheckBookType	Checking
Balance	\$18,000.00
CheckBookName	CapitalFinancialCheckbook
Location	Capital Financial
Default	☒
ExternalID	Store2Checkbook
Created By	Mike Griggs, 3/2/2017 1:39 PM

Last Modified By [Test User2, 3/2/2017 3:47 PM](#)

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit for Approval](#)

Open Activities

[New Task](#) [New Event](#)

No records to display

[Open Activities Help](#) ?

Activity History

[Log a Call](#) [Mail Merge](#) [Send an Email](#)

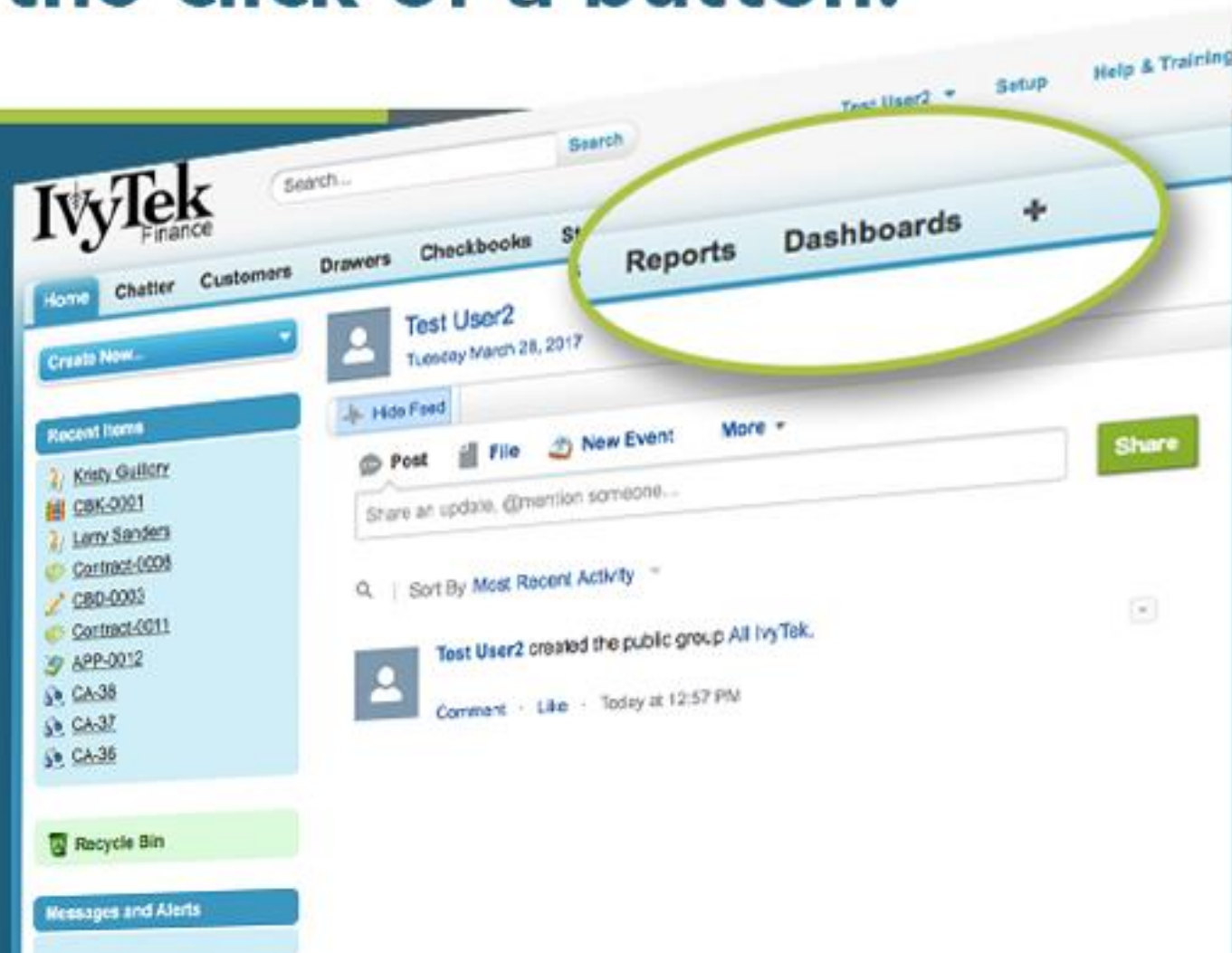
No records to display

[Activity History Help](#) ?



Quick and easy access with the click of a button.

Easily create
customized
reports &
dashboards with
"quick click"
drill-down
analysis &
scheduled
reports.





Stay Organized

The application replaces disorderly papers with an automated, digital record for processing.





Use our Certified Professionals to fine-tune your App

Not all companies are alike. We understand that while our base package may meet most of your requirements, it still needs to be configured and customized to suite your workplace.

Our consultants provide guidance and expertise on how to best leverage our App to support your specific business process and achieve a higher return-on-investment.

Contact Us Today

sales@ivytek.com || 337-212-0994 || IVYTEK.COM