leasepath

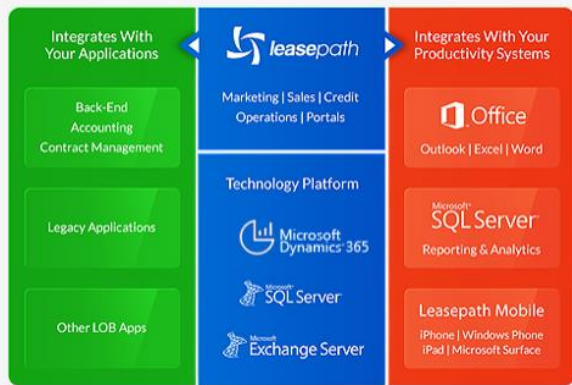|		
Document Management	Origination Workflow	Credit Adjudication
Lead Management	Partner Portal	Analytics & Reporting
Mobile & User Experience	Integration & Apps	Data Security & Audit

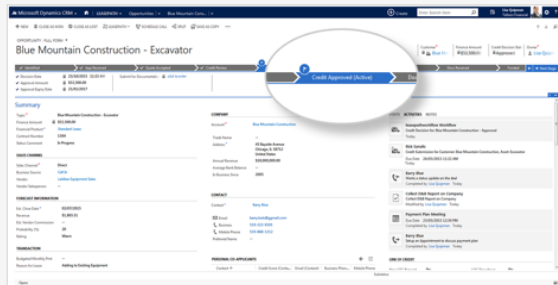## Customer Relationship Management

Microsoft Dynamics 365 is the best relationship management software in the world. Imagine it optimized and customized specifically for your industry, then add Origination, Credit, and Documentation – **now you have the Leasepath CRM Loan Origination System.**

Lead Management

Generate more leads and track their process. Use Leasepath Lead Management features such as:

- Campaigns
- Segmentation
- Qualifying Workflow
- Lead Insight

Loan Origination Workflow

Leasepath provides a structure and framework for the processing of new business.

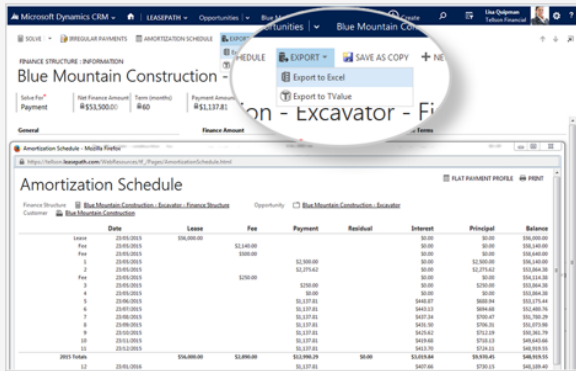Define best practices for your sales team to automatically follow
Ensure opportunities are qualified early on in the process
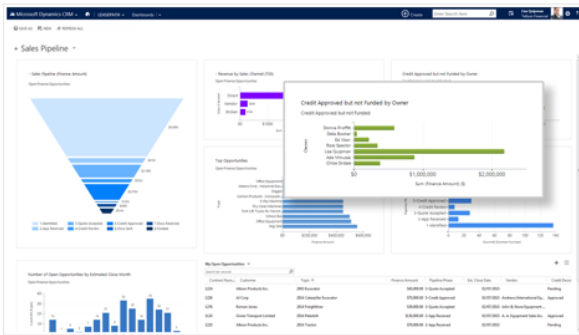Easy for Partners and Employees to securely and quickly start the Loan Origination process.

Mobile & The User Experience

Users can take advantage of the platform that makes them more productive at any time. No other product offers Leasepath's integration with Microsoft Outlook, Mobile Apps (both Cell and Tablet), and works On-premise or from the Cloud.

Integration & Apps

One system that does everything does not exist. There are 3rd party Apps for everything, even in the Enterprise. Today's best systems must be designed to work with other systems and have an App ecosystem. **Leasepath does.**

Analytics & Reporting

Use Leasepath's dashboards and metrics to analyze performance and trends.

Measure success factors with actual results and adjust your risk tolerance and strategy accordingly.

Credit Adjudication

Leasepath ensures that opportunities arrive in Credit Department queues only after all the required business rules and processes have been followed. Credit Managers are then automatically notified that a new opportunity needs their attention and they can proceed to use Leasepath to fully adjudicate the deal.

Document Management

Leasepath allows users to capture and store executed documents and attaches them digitally to a deal. In addition Operations will save time by using Leasepath to generate and package deals prior to the delivering them to the end customer, vendor, or funder.

Data Security & Audit

Leasepath's Cloud Infrastructure uses all the latest facility infrastructure, on-premise access, software, user, and database security. No access to facilities, function, or data is possible unless you allow it, and when you do, Leasepath tracks who, what, and when data was updated so you can audit it.