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## IDS InfoLease and Rapport Available as 100% Software as a Service

The world's most strategic asset finance firms trust Rapport and InfoLease software. They serve as the core of their asset finance platforms. Now, IDS offers our best-in-class origination and portfolio management software as a true SaaS solution with IDScloud. Moving to the cloud means banks, independents and captives of all sizes can access the powerful software that shaped the industry. It also means fast deployment, easy onboarding and the ability to use what you need and scale quickly as your business evolves.

For more information visit [www.idsgroup.com/cloud](http://www.idsgroup.com/cloud).

**IDS**<sup>™</sup>

Asset Finance  
Technology

# 2019 Software Guide

THE LEADING SOFTWARE SOLUTIONS FOR THE EQUIPMENT FINANCE INDUSTRY.





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## 7 Technology Steps to Take Now

In order to compete in today's rapidly changing world, equipment finance firms are innovating their business processes and recognizing the value of investing in technology upgrades. In tackling technology projects, most organizations have multiple goals, from improving the customer experience to gaining an advantage amid increased competition. In addition, equipment finance executives and IT professionals are considering how to incorporate emerging technologies, including data analytics, artificial intelligence and blockchain. Here are seven steps your company can take now to compete in the new digital frontier:

**1 Determine Your Best Benefit from Data Analytics** – Equipment finance companies are sitting on a goldmine of data. Companies that can dig through their data and coalesce it into something they can use will find themselves a step ahead of the competition. Your data can be used in countless ways, from enhancing equipment valuations for end-of-term remarketing to testing regressions in structured data and finding relationships missed previously. As a first step, think about how you might leverage your data and ask what's possible.

**2 Implement Smart Contracts** – Smart contracts are electronic documents that use embedded coding to execute the contract automatically when predefined conditions, such as payment, are met—or not met. Smart contracts record the terms of a transaction and connect with selected bank accounts. When certain triggers are activated, such as the movement of funds from one account to the other, the contract evaluates the data against predefined conditions and sends data to appropriate parties for compliance and reporting.

**3 Look for Opportunities to Apply AI** – The use of “chatbots” to replace customer call centers and help desks is growing, and it's not hard to see why. Chatbots are computer programs that use artificial intelligence to simulate human conversation, and they're becoming increasingly sophisticated. The lines between human help and AI are starting to blur because many people can't tell the difference between them. AI can also be found in applications that revolve around automated invoicing, payments and cash-application solutions.

**4 Increase Your Vigilance** – Unfortunately, hackers, fraudsters and cyber-criminals continue to be as innovative as new technology. A recent hacking trend called “social engineering” uses social media to glean and imitate relationships between

companies, vendors and employees. There's no single tool that will prevent suspicious electronic correspondence and help you sleep at night. So it's important that your colleagues and vendors are diligent in taking steps to avoid fraud.

**5 Think About Where to Use Blockchain** – Although the technology is hard to understand, the conversation about blockchain is shifting from technology enthusiasts to business people, including those in equipment finance. Blockchain is a shared electronic ledger, each copy of which contains the same validated information and cannot be undone. No specific product yet exists to usher blockchain into equipment finance, but experts say it's time to start thinking now about what new business models are possible when real, synchronized data exists across the value chain.

**6 Look and Learn Outside Equipment Finance** – If you're limiting your learning about operations and technologies to the equipment finance industry, you may be missing the mark. Invest in looking outside the industry to consider how new technologies can be applied to your business.

**7 Modernize Your IT Systems** – If you're thinking it might be time for your company to tackle a technology upgrade, take the “Quick Quiz: How do you know when it's time to upgrade your software platform?” on page 4 and consult the resources in this Software Guide.

The ELFA Board of Directors has established a Technology Innovation Work Group to monitor, analyze and understand the impact of new technologies on the equipment finance industry and ELFA businesses. Stay tuned for more information from this group.

*This story is excerpted from ELFA's Equipment Leasing & Finance Magazine. To read more, visit <http://bit.ly/2Arxjrk>.*



## ELFA Technology Resources

In addition to this software guide, turn to the following resources for IT support:

- **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)
- **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](http://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](http://www.elfaonline.org/about/awards)
- **Operations and Technology Web Page:** Visit this page to access additional resources, including articles and research studies from the Equipment Leasing & Finance Foundation. [www.elfaonline.org/industry-topics/operations-technology](http://www.elfaonline.org/industry-topics/operations-technology)

### Quick Quiz: How do you know when it's time to upgrade your software platform?

While you may have been ahead of the curve when you implemented your system, your platform may not have kept up with the pace of change. Do you find yourself not able to take advantage of new digital capabilities or quickly respond to changes in market conditions due to system constraints? If any of the following scenarios apply to you, it's time to consider whether your business could benefit from a change in systems:

- Out of alignment:** Your software platform does not align with your current technology goals or digital strategy. If after assessing your business strategy and capabilities needed to achieve your business objectives you find your current system severely lacking or unable to adapt, it might be time for a change.
- Not meeting customer needs:** Your customers increasingly demand more flexibility in their agreement structures, including a desire to have bundled, managed services or non-standard finance agreements and your current software platform doesn't support these capabilities.
- Outdated:** You are concerned your current platform is no longer secure, reliable or compliant with new and ever-changing standards.
- Inflexible:** Your business is constrained by an inflexible system. Whether you are looking to offer new financial products, enter new markets or utilize new sales channels, you need a software platform that gives you the flexibility to grow your business as you need to.
- Straining headcount:** Due to system constraints, you cannot scale your business significantly without increasing headcount.
- Insufficient reporting capabilities:** Your key systems do not enable you to access data for meaningful analytics and service-level metrics tracking.
- Not integrated:** Your integration capabilities are severely limited, preventing you from providing seamless processing for both internal and external users.



## Alfa Financial Software Inc

**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.

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Birmingham, MI 48009  
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# Bloomberg Tax

## Bloomberg Tax Technology

### Program Name:

Bloomberg Tax Leased Assets

### Type:

ASC 842 Compliance & Reporting

### Description:

Bloomberg Tax Leased Assets allows your company to track operating and finance leases, perform complex calculations for right-of-use (ROU) assets and lease liability, and deliver advanced reports, such as payment and amortization schedules, and much more. Delivering a fast and reliable path to ASC 842 compliance, Bloomberg Tax Leased Assets is a Web-based, end-to-end solution that will help companies centralize lease data, automatically classify, and deliver an audit trail that provides visibility into each step of the lease accounting process regardless of the size of your lease portfolio.

### Key Features:

- Calculation engine to auto calculate right of use (ROU) asset, lease liability, and interest expense.
- Documents management to upload and store lease contracts
- Entity management so you can track lease assets by entity and manage consolidated groupings among assets
- Data integration using custom APIs for integration with ERP systems
- Automatic classification of leases as operating or finance
- Reporting and journal entries to generate payment and amortization schedules, and ASC 842 disclosures
- Audit history and permissions allow you to track changes by user and set permissions and controls based on user roles
- Open Timeline (a Bloomberg Tax exclusive) keeps a thorough and secure historical record of all changes made to an asset for full timeline visibility

### Recent Enhancements

- Support for customized, flexible lease payment schedules which allows users to define their payment schedule with as few restrictions as possible to accurately reflect terms set out in a lease agreement.
- Integration support for automating workflows between Bloomberg Tax Leased Assets and general ledgers, ERPs, and other accounting systems.

### System Configuration:

Bloomberg Tax Leased Assets is a SaaS solution on the proprietary Advantage platform which delivers a comprehensive view of key financial metrics across accounting, compliance and audit teams. Solutions on Advantage also include the industry leading Bloomberg Tax Fixed Assets, providing our customers with the ability to manage assets across the lease-to-fixed assets full lifecycle.

### Vendor:

Bloomberg Tax Technology  
1801 South Bell Street  
Arlington, VA 22202  
Web Site: [www.bloombergtaxtech.com](http://www.bloombergtaxtech.com)

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### Social Media:



<https://twitter.com/BloombergTax>



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



<https://www.linkedin.com/showcase/bloombergtaxtech/>



## Cloud Lending, a Q2 Company

### Program Name:

CL Originate, CL Lease, and CL Collections and CLS Lease Xcelerate Program

### Type:

Lease Origination, Servicing and Collections

### Description:

CL Lease is a cost-effective and flexible solution to efficiently manage lease portfolios, increase transaction volume, and bring new products to market.

CL Originate is an origination and underwriting application built natively on Salesforce that manages your leases, converting applications into contracts for servicing. Automates credit pull, credit decisioning and collateral evaluation, providing quick estimates about the leasing arrangement to the applicant.

### Recent Enhancements

- Our "Risk Analysis" loan dashboard feature enables users to initiate scorecard evaluations, view the detailed results of scorecard evaluations, aggregated results of scorecard evaluations, and scorecard criteria.
- View Relationship Graph: Where multiple parties are involved in the application, a relationship graph gives details of all linked entities (Co-borrower, guarantor, cosigner, pre-existing relationships with other parties) to assess the extent of exposure involved.
- Policy Exception: Financial institutions can automatically generate policy exceptions and define policy conditions/exceptions.
- Payment spread configuration has now been modified for tax applications and supports tax configuration for Tax First, Receivables First, or Distribute. When this option is selected the system must apply and distribute payment between receivable and tax in equal proportion. e.g. if C and T are charged and tax amount respectively, then the payment must be distributed in the proportion of  $C/(C+T)$  and  $T/(C+T)$  towards charge and tax respectively.

- Tracking Notifications: Delivery notifications sent from CL Collections systems contain email and names. This feature enables you to track the delivery of notifications (emails or messages) being sent and the status so collectors can take follow up action based on status.

### System Configuration:

Cloud-based built on Salesforce, our CLS Lease Xcelerate Program is an 8-week implementation program to get you live in 8 weeks for a fixed cost.

### Vendor:

Cloud Lending, a Q2 Company  
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 <https://www.facebook.com/CloudLending>

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





*Be part of the solution*

## Codix LLC

**Program Name:**

iMX

**Type:**

Complete leasing/finance software solution

**Description:**

CODIX has developed and implemented a global software solution called iMX. The solution covers the entire lifecycle of leasing products, assets and services. This includes the following:

- Prospection
- Contract implementation including multiple assets features
- Acceptance
- Supply management and Pre-financing
- Contract management
- Contract and services modifications
- Early terminations, normal expiries and extensions
- Debt collection
- Asset management from supply to sale including lease and off-lease periods

The iMX solution utilizes unique concepts and technologies in its expert systems to streamline the entire workflow from transactions through follow-up. iMX technology allows for clients to change processes dynamically resulting in maximum compliance and efficiency. Backed by a fully functional web portal, peak automation can be achieved. In addition, its fully functional decision and analysis tool provides complete reporting capabilities. All of this leads to increased profits due to reduced costs.

iMX is multi-currency, multi-product, multi-country, and multi-entity. Many clients have subsidiaries (both domestically and internationally) using one instance of the solution to provide a solution for their complete corporate landscape. The ability to grow internally and with partners is endless.

With 550+ employees worldwide, Codix continues to provide advanced finance and leasing solutions.

**Vendor:**

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## Constellation Financing Systems Corp.

### Program Name:

Edge, ASSET, Covarity, Vision Commerce

### Type:

Origination, Portfolio Management, Loan Monitoring

### Description:

#### *Originations: Edge*

Edge is an origination platform with functional support for all front office processes, including CRM, credit applications and adjudication, pricing, documentation, funding, reporting, and booking into the portfolio management system of record.

#### *Originations: Vision Commerce*

Vision provides a full suite of products to automate the entire application lifecycle in a single integrated platform.

#### *Portfolio Management: ASSET*

ASSET is a proven leasing and loan portfolio management system of record with the functional depth required to manage leases, daily interest loans, and lines of credit. ASSET's functional depth includes class-leading syndication, securitization, and participations functionality.

#### *Commercial Loan Monitoring: Covarity*

Covarity automates the monitoring of working capital and/or Asset-Based Lending transactions.

### Recent Enhancements

#### *ASSET enhancements:*

- Support for Non-Accrual Operating Leases
- New US Tax depreciation reports
- iLien Interface for UCC filing
- Integration with SuperTrump and Taxware

#### *Edge enhancements:*

- Redesigned Report Manager for better report categorization and ease of use
- Ability to integrate with Outlook within Edge
- Enhanced Web Portal functionality for easier third party vendors/brokers setup

### *Vision Commerce enhancements:*

- Configurable Framework
- Mobile Ready Design
- Multiple Delivery Methods to Meet Budgets
- User Friendly
- Will Integrate With Any Back End System

### System Configuration:

ASSET can be deployed on any Windows Desktop, Windows Server, Unix and Linux environments are supported.

Edge can run on Windows Vista or Windows 7/8 or in any Browser and uses Microsoft SQL Server (2005/2008/2012) as its database.

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

### Comments:

Constellation Financing Systems' software delivers full asset finance life-cycle functional support, delivered in component parts as a point solution or in whole in an end-to-end, enterprise basis.

Our software can be deployed either as a licensed in-house solution, a hosted ASP solution or as a Software as a Service (SaaS).

### Vendor:

Constellation Financing Systems Corp.

690 Dorval Drive, Suite 405

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)

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## Copernicus-USA, LLC

### Program Name:

Solar, JUKI

### Type:

CRM, Origination, Front, Middle and Back Office. Web Native with Integrated Portals and Mobile

### Description:

Fully integrated, web native solution, designed for the Global Finance Industry, providing seamless CRM, Origination, Front, Middle and Back Office functionality with integrated Portals and Mobile. Built using the latest web native technologies and finely tuned by our many years of industry experience, we believe we are able to deliver the most robust, flexible and complete asset finance software package in the Industry; a web native cradle to grave asset finance pricing, administration, accounting and collections system. Designed and built using Microsoft's .NET framework and SQL Server as well as the latest security technology based on Open Authentication Standards.

### SOLAR:

Process any payment structure, with multiple drawdowns and other complex cash flows, including commissions, subsidy, maintenance, fees and insurance. Extremely easy to use as it runs in a standard web browser with controls that users are already familiar with. Available as either a hosted (cloud) solution or, as an in-house system. Provides:

- complete Portfolio control through a full double entry bookkeeping system
- user-configurable Workflow with documents and alerts
- flexible and user-configurable Reporting
- sophisticated Decisioning and Credit Scoring
- powerful Calculation and Accounting engine
- user-configurable Collections functionality
- integrated CRM with a Marketing Campaigns management module
- integrated Portals

### JUKI:

Standalone and integrated mobile processing for sophisticated financial calculations, Quoting and Portal functionality.

### Recent Enhancements

Additional Asset functionality providing lifecycle asset processing completely outside of a contract. Includes a separate Stock Register with auto data upload.

### System Configuration:

Designed and built using Microsoft's .NET framework and SQL Server as well as the latest security technology based on Open Authentication Standards.

### Comments:

Copernicus provides full support for the modern Installment Finance Industry - available for Brokers, Small to Big Ticket, Independents and Captives. We offer a new approach designed to reduce implementation timescales and costs.

### Vendor:

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## Crowe LLP

### Program Name:

Crowe Lease Accounting Optimizer

### Type:

A complete, end-to-end ERP solution for Equipment Lessors

### Description:

Designed by accounting and technology professionals, Crowe Lease Accounting Optimizer allows companies to comply with the FASB ASC 842 and IASB IFRS 16 regulations and automate the financial transactions associated with their leases directly within their ERP solution. In addition to a complete ERP solution, the application supports specific requirements related to lease accounting, including:

Automation reduces manual error

- Automatic calculation of key schedules such as lease payment, lease liability amortization, and asset depreciation
- Automatic classification of leases for ASC 842 and IFRS 16 purposes
- Automatic generation of journal entries for the lease recognition, invoicing, interest and depreciation

Make faster decisions with a single view of the business

- Complete lease information management such as commencement date, renewal and transfer of ownership options
- Cash-flow forecast management
- Balance sheet-sheet impact calculator
- Contract document management

Reduce risk with embedded audit controls over lease data

- Improve customer service with customer lifecycle management tools
- Real-time executive visibility using embedded dashboards
- Empower employees to make decisions with access on any device, anywhere
- Eliminate missed opportunities caused by disconnected systems and silos of information

### Recent Enhancements

Crowe Lease Accounting Optimizer is built using Microsoft Dynamics 365, which provides industry leading ERP functionality to provide complete financial management in addition to lease accounting with no need to import or integrate journal entries.

### System Configuration:

Built on Microsoft Dynamics 365 Finance and Operations, Microsoft's leading ERP platform.

### Comments:

For additional information, please view the solution on Microsoft AppSource.

### Vendor:

Crowe LLP  
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<https://www.facebook.com/CroweUS/>



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



<https://youtu.be/-UQxaYhue80>



## Dominion Leasing Software LLC

### Program Name:

LeaseComplete

### Type:

Lease accounting, loan accounting, asset management, equipment maintenance/repair tracking, collection tracking

### Description:

LeaseComplete© is a comprehensive lease & loan accounting and asset management system featuring a robust feature-set capable of supporting equipment, consumer, and specialty credit portfolios. Through the use of a modern and fully customizable user interface and a robust open API, LeaseComplete© seamlessly integrates powerful accounting and management tools into your normal business workflow. Features include commitment/credit line processing, asset-level preventive maintenance and reconditioning/repair tracking, funding source management and payables, inventory management with book/tax depreciation, insurance tracking and follow-up, collection management module, document imaging, and much more. In addition, the system boasts a deep reporting library of 700 configurable reports and an integrated scheduler to deliver information directly to your inbox. For more complex tasks, the system features nearly 30 separate wizards to guide you step-by-step and ensure accuracy before you commit changes. Interfaces include GL, ACH/PAP, credit reporting, sales tax, property tax, and many others.

### Recent Enhancements

Standard system maintenance includes all annual updates, which includes new features, and free installation. LeaseComplete© added nearly 100 new features in our last annual update.

### System Configuration:

Built on a Windows platform using an n-tier model, LeaseComplete© features a robust UI, web services business tier with open, secure API, and 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

*"From a fast-tracked conversion schedule to implementation we have been very impressed with the service we have received from the team at Dominion."*

- BLI Rentals, Inc

*"The conversion process went great and we have been very happy with the functionality of the software. What we have been most impressed with is the outstanding customer support."*

- Wallwork Financial Corporation

### Vendor:

Dominion Leasing Software LLC  
1545 Standing Ridge Drive, Suite B  
Powhatan, VA 23139-0550  
Web Site: [www.domls.com](http://www.domls.com)

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<https://twitter.com/dominionls>



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

Empowering  
the Financial World



## FIS

### Program Name:

Ambit Asset Finance

### Type:

Cloud ready, end-to-end asset finance platform supporting origination through remarketing for leases, loans and inventory 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.

Ambit Asset Finance is a global single source platform for loans and leases delivering end-to-end capabilities. Ambit Asset Finance enables our customers to manage the entire asset life-cycle across multiple financial products with complete visibility over the enterprise.

#### Key Product Features

- Configurable workflows
- Consolidated portfolios in a single database
- Intuitive configuration maps the solution to your business
- Flexible integration layer via APIs and industry standard interfaces
- Real-time

#### Benefits:

- Reduce total cost of ownership and increase speed to market
- Improve risk management and compliance

- Smarter and more efficient operations
- Independence from vendor

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

Automated Testing: Using Clients' configuration of Ambit Asset Finance, FIS distributes releases validated to work in your environment. Upgrades are no longer a budgetary consideration, rather, business as usual.

### 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 from FIS Cloud to 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

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New York, NY 10173

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

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Asset Finance  
Technology

## IDS

### Program Name:

InfoLease®, Rapport®, IDScloud™

### Type:

Asset and Equipment Finance Technology

### Description:

For nearly 40 years, leading asset and equipment finance enterprises in 30+ countries have built their businesses on full lifecycle solutions from IDS. Our software streamlines the entire asset and equipment finance process for lease or loan product, from origination to portfolio management to end-of term. Our battle-tested solutions empower banks, captives, and independent lessors to make fast decisions, fly through audits, automate manual processes, and uncover actionable analytics, so they can focus on growing their businesses. IDS solutions provide customers with a choice of on-premise or 100% SaaS deployment which integrate seamlessly into any asset finance ecosystem – the sustainability, flexibility, and economy of our cloud makes solutions accessible to banks, independents, and captives of all sizes.

### Recent Enhancements

IDS technologies provide an ever-growing range of pre-integrated services to enable greater efficiency, continued innovation and enhanced partner management. Enhancements include:

- Credit Facilities - Support workflow to track the progress of a deal as it flows through the initial request, credit decisioning, and managing drawdowns.
- Dealer Programs – Define external sales channel relationships and enable end users to submit application data via a portal, mobile device or third-party system.
- Integration with Vertex O for Tax Compliance - Support full lifecycle integration of the Vertex O tax engine, including tax rates, tax rules, and tax calculations.

- Asset Level Billing & Payments - Meet your customers' demands to view / receive invoices and remit payment at the asset level.
- Growing Ecosystem of Standard Integrations - Seamlessly integrate industry-leading platforms and services including CRM tools like Salesforce.com, e-signature tools like eOriginal and DocuSign, and tax providers like Vertex.

### System Configuration:

Our architecture is built on a modern, open framework and intuitive browser-based user interface. Leveraging industry leading technologies helps to ensure stability, security and performance across our product suite.

### Comments:

To learn more about IDS solutions, visit us at [www.idsgroup.com](http://www.idsgroup.com).

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Email: [RWizbowski@idsgroup.com](mailto:RWizbowski@idsgroup.com)

### Social Media:



<https://twitter.com/idsgroup>



<https://www.linkedin.com/company/international-decision-systems>



## IFS Technology Solutions, Inc.

### Program Name:

IFSLeaseWorks

### Type:

Lease/Loan Accounting, Administration and Originations

### Description:

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 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
- Imaging enabled workflow and bar-coded document tracking
- 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
- Rules-based sales-tax management

### Recent Enhancements

- Electronic Signature
- Dealer/Vendor Portal
- Customer Service Portal
- Business Intelligence Portal

### System Configuration:

Database O/S: Unix, Linux and Windows  
Client O/S: Vista/7 or Citrix  
Database: Oracle DBMS 11g  
Development Platform: .NET 3.X/4.X  
Languages: VB.NET, ASP.NET, PL/SQL

Licensed or ASP/Hosted Solutions

### Comments:

IFS Offers Custom Development and Implementation Consulting

### Vendor:

IFS Technology Solutions, Inc.  
500 Route 17 South  
Hasbrouck Heights, NJ 07604  
Web Site: <http://www.ifstechnologysolutions.com/ifsleaseworks/>

### Contact:

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## Ivory Consulting Corporation

### Program Name:

SuperTRUMP, 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 industry proven solution for modeling and pricing complex 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 for Salesforce eliminates manual data entry and streamlines your workflow with integrated pricing of leases and loans in Salesforce.

SuperTRUMP Oracle Lease & Finance Management Server (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

### SuperTRUMP Portfolio Intelligence:

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

### 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:

- Valuation Module creates and manages asset valuations.
- Disposition Module tracks mid-term and end-of-term disposition information.
- Remarketing Module orders and accesses completed inspection reports, tracks returned equipment and assigns the asset for resale.

### System Configuration:

SuperTRUMP is deployable via Salesforce, Web & Desktop interfaces

Database products currently run SQL Server; Oracle 8i and later.

### 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  
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### Social Media:



<https://twitter.com/IvoryConsulting>



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



**Program Name:**

Leasepath

**Type:**

CRM, Origination

**Description:**

Leasepath is a hosted CRM and equipment finance Origination system built on Microsoft Dynamics 365 for Sales. Leasepath combines the flexibility of Microsoft's CRM product with automation built for the equipment finance industry. Hosted by Microsoft Cloud, Leasepath provides a secure network, ease of integration with core business applications like Outlook, and worldwide accessibility.

Leasepath promises a system in which origination will flow in the manner that fits your users, while introducing powerful automation and analytics tools to increase speed, visibility, and efficiency. Leasepath guides users through a fluid lifecycle: CRM, Origination, Credit Review, Documentation, and Funding. The end result is better visibility for the entire organization, increased efficiency, more actionable data, improved customer service, and a far more intuitive environment.

Leasepath brings accessibility and ease of use to critical business functions. Develop multiple quotes attached to a single deal, track submissions to multiple funders and easily manage responses in a single place and use system rules to determine multi-tiered decision-making. Complex issues that were once difficult to manage can be as easy as a few clicks with Leasepath.

Leasepath is committed to providing the most powerful CRM and Origination platform available, while still remaining accessible to new users. Prepare for the future, secure your environment, and make origination easier with Leasepath.

Leasepath offers:

- Origination Workflow to Streamline the Sales Process
- Predictive Analytics with Power BI
- Dynamic Document Generation
- Audit Trail and Document Management Meets SEC Guidelines
- Integrations with Back Office Systems & Credit Bureaus of your Choice
- Leasepath Portal connects Funders, Brokers, and Vendors through a seamless web interface

**Recent Enhancements**

Leasepath Scorecard offers dynamic scoring of new opportunities, kicking off automatic processes and workflows.

**System Configuration:**

Leasepath is deployed through a secure, hosted Microsoft server and accessed through a web browser or mobile phone from anywhere in the world. Leasepath is integrated with your Office 365 applications and Docusign.

**Vendor:**

Leasepath  
4903 Thomas Alton Boulevard  
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Burlington, ON L7M 0W8 Canada  
Web Site: [www.leasepath.com](http://www.leasepath.com)

**Contact:**

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Email: [sean.scampton@leasepath.com](mailto:sean.scampton@leasepath.com)



**Linedata**

## Linedata Lending and Leasing

**Program Name:**

Linedata Capitalstream and Linedata Ekip360

**Type:**

Front and Back Office Automation for Leasing & Lending

**Description:**

Linedata Capitalstream is a credit origination and risk management solution that integrates and automates previously disparate processes to streamline lending and leasing.

Capitalstream transforms manual paper-based operations into automated enterprises that respond quickly, efficiently and consistently. It streamlines sales, origination, credit analysis, underwriting, decisioning, document generation, closing, funding, booking, account monitoring and ongoing risk management to reduce cost, risk and processing time.

Linedata Ekip360 is a global front-to-back software solution designed to automate and manage the complete life cycle of finance sales and operations for the lending and leasing industry. It is multi-currency, multi-lingual, multi-country and covers the entire value chain, seamlessly, from retail to commercial finance operations.

Deployed internationally in 25 countries, Linedata Ekip360 covers a wide range of financial products: for consumers to business and government, with consistent and efficient credit origination and portfolio management.

**Recent Enhancements**

Linedata Capitalstream provides business intelligence and analytics, enhanced portfolio monitoring and risk management, content management and automation,

Salesforce.com integration, e-signature support and financial spreading and statement analysis.

Linedata Ekip360 delivers powerful, intuitive web user interfaces which can be personalized. These include pages grouping multi-tab business information, a 360 degree view on business object context, contextual widgets of possible actions and ongoing workflow actions.

**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  
Seattle, WA 98101  
Web Site: [www.Linedata.com](http://www.Linedata.com)

**Contact:**

Don Rubin  
Phone: (561) 398-5824  
Email: [don.rubin@na.linedata.com](mailto:don.rubin@na.linedata.com)

**Social Media:**



<https://twitter.com/linedata>



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



## LTI Technology Solutions

### Program Name:

ASPIRE

### Type:

LTI provides an end-to-end equipment finance lifecycle management solution.

### Description:

LTI provides an end-to-end equipment finance lifecycle management solution, ASPIRE, that flexibly manages a contract from lead management through termination. ASPIRE is designed with a workflow orientation that focuses on standard business processes, integrating the data required by those processes and automating, tracking and streamlining processes intuitively, by each individual end user.

The end result to the customer is a comprehensive view into their entire enterprise, allowing for: better visibility into accounts, better customer service, improved efficiencies and a more intuitive decisioning process. Ultimately, a more fluid transaction lifecycle brought on by having a true end-to-end system.

LTI remains committed to offering flexible solutions designed to meet the needs of their clients now and into the future. LTI's goal with its flexible architecture is to accommodate all types and sizes of equipment finance companies including: small, middle market ticket sizes, small and large portfolios, captives, financial institutions and independents.

### Recent Enhancements

ASPIRE is built using the latest technologies from Microsoft, which provides cutting edge functionality for the entire lifecycle of an equipment finance contract on one system.

The benefit LTI's flexible architecture brings to its customers is the ability to take their business in any direction they choose while still utilizing the same system. LTI's larger and more diverse client base also means a more robust set of features and solutions.

### System Configuration:

LTI's solutions can be deployed in house or in a hosted environment.

### Comments:

For more information, please contact our Sales Department at 800-531-5086.

### Vendor:

LTI Technology Solutions  
4139 S. 143rd Circle  
Omaha, NE 68137  
Web Site: [www.ltisolutions.com](http://www.ltisolutions.com)

### Contact:

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### Social Media:



[https://twitter.com/LTI\\_Solutions](https://twitter.com/LTI_Solutions)



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



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



## NETSOL Technologies

**Program Name:**

NFS Ascent, NFS Digital

**Type:**

Credit Origination, Lease/Loan Management, Wholesale Floorplan Financing

**Description:**

NETSOL Technologies is a U.S. based, leading financial technology provider to the global equipment finance and leasing industry.

NFS Ascent's end-to-end finance lifecycle solution is a fully integrated suite of products that can be used individually or together, including a Contract Management System (CMS), a web-based business Loan Origination System (LOS) and application processing tool, and a Wholesale Finance system (WFS) which automates the management of floor plan financing for finance companies and banks.

NETSOL also offers NFS DIGITAL which consists of a suite of mobile applications, virtual reality and AI-powered chatbot programs that support every stage of the leasing lifecycle (new business through to portfolio management).

NFS DIGITAL seamlessly integrates with NETSOL's NFS Ascent or any other third-party CMS.

**Vendor:**

NETSOL Technologies  
23975 Park Sorrento  
Suite 250  
Calabasas, CA 91302  
Web Site: [www.netsoltech.com](http://www.netsoltech.com)

**Contact:**

Haider Naqvi  
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**Social Media:**



<https://youtu.be/sglnCHoY59U>

# odessa

## Odessa

**Program Name:**

LeaseWave

**Type:**

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

**Description:**

Odessa is a global software development and consulting company. With a singular focus on asset finance since 1998, Odessa provides the LeaseWave system and Odessa Platform to power a diverse, vibrant customer community.

LeaseWave is a functionally rich, end-to-end solution comprised of 180+ configurable modules. Designed to meet world-class standards of scalability and performance, the system automates leasing operations while generating the underlying accounting entries for transactions. The Odessa Platform enables self-service through low-code development, test automation, reporting and business intelligence features to ensure organizations can more effectively align business and IT objectives.

Over the last 21 years, Odessa has consistently distinguished our solution via three unique selling propositions:

**Cutting-edge Technology:** built on an industry-standard technology stack, our solutions separate business functionality from the technology driving it. Odessa's Platform allows for ongoing upgrades to provide technology advances with minimal impact to end-users.

**Configurable Design:** engineered to be configured and customized by users, our solutions enable business agility to meet ever-changing requirements. Customers can extend and enhance their system functionality and build custom leasing or standalone apps.

**Mature Functionality:** our solutions have the maturity to manage the largest, most sophisticated leasing and finance companies in the world from a diverse cross section of industries and sales channels.

**Recent Enhancements**

**Odessa Analytics:** built upon a powerful associative engine, our Analytics offering facilitates intuitive visualizations of your business data. Put analytics into the hands of every system user to instantly surface in-context insights and suggestions.

**Odessa APIs:** seamlessly connect business applications with our Standard Connectors, or create your own integrated solution with our easy-to-use SOAP and REST APIs.

**System Configuration:**

Current Version: LeaseWave 5

Odessa Platform: .NET 4.6

Language: C#, ASP.NET, VISUAL STUDIO 2015

Database: SQL Server 2008/2014

**Vendor:**

Odessa

Two Liberty Place, 50 S. 16th Street • Suite 2300  
Philadelphia, PA 19102

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

**Contact:**

James Humphrey

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Email: [jim.humphrey@odessainc.com](mailto:jim.humphrey@odessainc.com)

**Social Media:**

<https://twitter.com/OdessaTech>



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



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



## Orion First Financial, LLC

### Program Name:

Orion First Portfolio Servicing

### Type:

Lease / Loan Portfolio Servicing

### Description:

Stop wasting your time looking for software! You do not need to.

Major software systems are not a requirement to grow your business. If you are facing a major purchase, upgrade or migration decision, you have another option.

By outsourcing portfolio servicing to Orion, our clients can focus their entrepreneurial energy on their largest value – funding small business. As an alternative option to investing in software and systems, Orion mitigates inherent risks in system implementations, upgrades, and maintenance.

As a third-party servicer, we recognize our position as an extension of your operations. Our private label, back office services cover all the bases: invoicing, cash management, customer service, collections, tax processing, reporting and more.

Orion's Client Portal provides 24 x 7 web-based access to portfolio and contract information, enabling you to monitor portfolio performance and obtain a comprehensive view of customer records. Through the Client Portal you'll be able to:

- Track portfolio performance on an easy-to-navigate portal dashboard
- Tag accounts requiring close monitoring with a customizable watch list
- Create email alerts and notifications to stay updated on portfolio activity

- Quickly find details on obligors, including current and contracts and collections activity
- Easily add change requests, update, or notes to obligor records
- Access the latest customer service and collections communications
- Locate recent payments, history, and other transaction details

We've developed a whitepaper, designed to reveal the challenges of building an in-house servicing operation, solutions for these challenges, the benefits offered by outsourcing to a third-party servicer and a cost comparison worksheet to help you evaluate your options.

Get the latest resource for finance company leaders, Orion First's "Buy vs. Build" whitepaper, before you invest in infrastructure or software.

Download your copy at <http://orionfirst.com/portfolio-servicing-buy-vs-build/>

### 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  
Email: [jcollins@orionfirst.com](mailto:jcollins@orionfirst.com)

### Social Media:

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



## Sopra Banking Software

### Program Name:

Sopra Financing Platform: Cassiopae; Apak WFS

### Type:

Financing, Lease and Loan Management, Inventory Finance

### Description:

The Sopra Financing Platform supports basic to highly-structured leases, loans, and inventory finance worldwide. It's a front-to-back, best-of-breed solution built on the most widely used technology platform for captives, banks, and financial services companies. Manage commercial, retail, and wholesale lending for all types of equipment and assets.

#### Cassiopae Leasing & Lending Software:

Cassiopae is a highly-flexible, industry-leading solution for managing any type of finance for any type of equipment or asset worldwide. The software offers comprehensive, proven features for managing the complete front-to-back loan/lease life cycle. Support multiple languages, currencies, and accounting requirements using a single database.

#### Apak Wholesale Finance Software:

Apak 'WFS' is widely recognized as the preferred wholesale floorplanning solution for major banks and captive finance providers in the automotive and equipment lending sectors. WFS can be rolled out to multiple markets on a single, global platform with minimal impact on business and technical infrastructures.

### Recent Enhancements

- UX and deployment enhancements
- Additional front, middle, and back-office features
- Additional financial product management
- Integrated dashboards
- Automated Workflow, processes
- POS, customer self-serve
- Cloud-ready today, cloud-native tomorrow
- Hosted or on premise

### System Configuration:

The Sopra Financing Platform is cloud-ready and leverages a service-oriented architecture (SOA) using state-of-the-art web technologies. It features a responsive, stateless, highly-robust, and scalable POS. The platform is an excellent fit with industry-standard ecosystems based on Java/J2EE frameworks with many business processes driven by web services. Web-native components support front-to-back browser access.

### Comments:

Sopra Banking Software, incorporating Apak Group and Cassiopae, provides industry-leading solutions for commercial, wholesale, and retail asset finance. With 4,300 employees and 800+ customers in 70 countries, Sopra Banking Software is one of the world's fastest growing companies in digital banking and financial technology.

### Vendor:

Sopra Banking Software  
1 Van de Graaff Drive  
Suite 202E  
Burlington, MA 01803  
Web Site: [www.soprabanking.com](http://www.soprabanking.com);  
[www.apakgroup.com](http://www.apakgroup.com); [www.cassiopae.com](http://www.cassiopae.com)

### Contact:

Bob Sullivan  
Phone/Fax: (435) 640-4186/(435) 647-9969  
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### Social Media:

 <https://twitter.com/SopraBanking>

 <https://www.linkedin.com/company/sopra-banking-software>





## Tamarack

**Program Name:**

Salesforce.com Loan/Lease Accelerator

**Type:**

CRM, Loan/Lease Originations, Portals

**Description:**

This is a platform, not a software package. Don't let that scare you; this is a pre-configured solution. You can choose from thousands of business "Apps". Use Tamarack or any of the thousands of other Salesforce consultancies to enhance your solution. Never pay for another expensive upgrade again; Salesforce is cloud based and constantly upgraded.

Tamarack has worked with over 40 Lending and Leasing Salesforce clients to develop this product. It includes leading AppExchange "Apps" and preconfigured workflow to take a Lease or Loan from credit application through funding, allowing rapid and cost-effective implementation of an origination solution on Salesforce.com.

The Tamarack Accelerator includes the following features:

1. Custom Borrower, Broker, Dealer, and Vendor Portals
2. Manage the entire Lease/ Loan Lifecycle: CRM, Quoting, Origination, Credit, Documentation, Funding, and Collections
3. Numerous Automations and Integrations: eSignature, Credit Bureaus, PayNet, Scoring, UCC Filing, Sales & Use Tax, Bank Statements, integrations to numerous lease accounting systems.

Why are so many lessors and lenders moving to Salesforce?

1. Open Platform: you are not stuck with one vendor
2. Secure: army of security personal at Salesforce protecting your data.
3. Market Place: thousands of business apps available in the AppExchange.
4. Future-proof: cloud based and always current.

Oh, and did we mention, the winner of the ELFA Operations & Technology Award.

**Recent Enhancements**

Added OFAC Support, LexisNexis Accurint, Moodys Risk Calculator.

**System Configuration:**

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

**Comments:**

For more information, please send us an email at [info@tamarackconsulting.com](mailto:info@tamarackconsulting.com) or visit us at [www.tamarackconsulting.com](http://www.tamarackconsulting.com).

**Vendor:**

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Minneapolis, MN 55401  
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**Social Media:**

 <https://twitter.com/tamarackmn>

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

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



## VREF Aircraft Value Reference & Appraisal Services

### Program Name:

VREF Aircraft Value Reference Guide

### Description:

The VREF Aircraft Value Reference Guide provides aircraft professionals with the latest, most up to date data for the following categories of aircraft:

- Piston Fixed Wing including current production, Light sport and experimental.
- Piston Helicopter all in and out of production models.
- Turbo-Prop Fixed Wing all in and out of production models.
- Turbine Fixed Wing all in and out of production models.
- Turbine Helicopter all in and out of production models.
- Business Jet all in and out of production models.
- Commercial Narrow Body all in and out of production models.

VREF Online is a subscription-only cloud-based software program featuring aircraft values (Historic and Current), optional equipment lists, performance data, maintenance expenses, modifications, and upgrades along with troubleshooting and field notes.

As an Online subscriber you are free to input your aircraft Serial Number specific data in real time and VREF does all the work, providing you with a customized report that includes Market Value (Retail and Wholesale) for your aircraft or helicopter that you can send to your client, bank or insurance company as an evaluation. You can depend on VREF to be 100% accurate as the data is provided direct from manufacturers, and every major bank and financial institution and the industry's leading distributors, dealers and brokers report on a regular basis on closing numbers.

VREF is the only trusted source for aircraft valuations and is the official Value Guide of the AOPA.

### Vendor:

VREF Aircraft Value Reference & Appraisal Services  
1411 McHenry Road  
Suite 125  
Buffalo Grove, IL 60089  
Web Site: <https://vref.com/>

### Contact:

Jason Zilberbrand  
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### Social Media:



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



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



# White Clarke Group

**Program Name:**

CALMS Compass

**Type:**

End-to-end floorplan finance software

**Description:**

White Clarke Group is the leading provider of retail and floorplan finance technology for the banking, captive and independent finance industries.

White Clarke Group's CALMS Compass end-to-end floorplan finance solution delivers feature rich 'out-of-the-box' functionality that is highly efficient, scalable and affordable to implement, with all the power of an integrated, 24/7 self-serve solution to support a successful floorplan finance line of business.

Delivered and supported by floorplan finance experts in our Atlanta-based center of excellence, CALMS Compass significantly improves operational efficiency and auditability while taking floorplan lending to the next level, with features that include a fully-featured dealer/supplier portal and industry-leading finance plan structure flexibility. A complete upgrade of your floorplan business is possible in just 90 days.

**Recent Enhancements**

White Clarke Group continually enhances the CALMS Compass system for regulatory compliance, functional efficiency and technology improvements.

**System Configuration:**

CALMS Compass is designed exclusively for floorplan finance lending of any asset type and manages the full lifecycle of floorplan finance from credit decisioning onwards. CALMS Compass is a flexible, scalable floorplan finance system implemented as a turn-key hosted solution or on-premise.

**Comments:**

White Clarke Group has a track record of over 27 years in finance technology leadership and innovation. The company employs around 600 professionals and has offices across North America, Europe and Asia Pacific. Clients include, but are not limited to: Centennial Bank, GM Financial, Republic Bank, Toyota Financial Services, Yamaha Motor Finance, Volkswagen Financial Services, John Deere Financial, Sumitomo Mitsui Finance and Leasing, Hitachi Capital, Canon Financial and Northpoint Commercial Finance.

**Vendor:**

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Alpharetta, GA 30005  
Web Site: [www.whiteclarkegroup.com](http://www.whiteclarkegroup.com)

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

 <https://www.linkedin.com/company/white-clarke-group/>

 <https://youtu.be/2WLG2lvbnzA>

# Get the Latest Software Listings!

The 2019 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/)

