ORION

INTRODUCER PORTAL

INTRODUCER PORTAL BENEFITS

Introducer Portal is where initial information is entered about the asset being sold, the customer purchasing it, and the finance provided to assist the sale. It has several features of recording, managing, retrieving, presenting and analyzing data.

- Capture customer information from web forms, direct entry into Introducer Portal, from Leads API

- Introducer is responsible for contacting customer for credit application missing information and ensure credit application and supporting documentation are available before submitting credit application for decisioning

- Submit customer information for credit assessment to Loan Assessment System

- Efficient Reporting System

WHY CHOOSE US?

- ◎ Lending Industry Knowledge

- ◎ Integrated platform that covers Origination,Credit Assessment, Settlement and Contract Administration business processes

- ◎ Fully hosted solution with Workflow Management & System Security

- ◎ Faster Business Processes execution speed & Shorter concept to implementation timeline for new features

- ◎ System Auditing & Compliance with National Consumer Credit Protection Act

- ◎ Automatic Credit Decision

- ◎ Digital Signature., Digital Asset Verification, Digital Bank Statement Submission

- ◎ Integration with data providers such as Glasses Guide, Equifax, illion, AddressIf, SecurePay, Banking Industry Standard Direct Entry File, Banking   Industry Direct Entry Return File

- ◎ Client portal - Complete platform to capture data directly from customer

- ◎ Software as a service offering.with easy to go pricing with 24/7 Support Team availability

- ◎ Mini Applications (eDocs, eSign, Asset Verify, Customer Service App, etc.) & Mini Web forms to Speed up Data Capturing

- ◎ Integration with Credit Application API, Lead API, Lead Zapier API, White Label

- ◎ Outlook Connectivity Integration and Calendar for setting up reminders