NoteDashboard
Loan Management Software

• Standardization of loan management process Standardization of loan management process
• Mitigation of risk through continuous metrics
• Default loan terms and conditions based on program rules
• Simplify letter creation and borrower communication
• Manage multiple disbursements
• Streamline loan information with a centralized dashboard
• Simplification of loan servicing by monitoring loan statuses
• Reduction of delinquency rates with maximize collections strategies
• Support for state and federal regulatory requirements
• Automation of loan accounting and reporting

Note Dashboard enables users to manage the complete servicing process for performing and non-performing loans. It provides powerful tool kit to simplify the servicing process so that borrowers get the right information every time. Note Dashboard streamlines loan management so that customers are best served. It gives the user of the system a complete and accurate view of their portfolio so that they can make informed management decisions.

Streamline the Servicing Process

Note Dashboard enables lending organizations and servicing companies to standardize the loan servicing and management processes and to centralize borrower information across credit, servicing and collections departments

Using intuitive screens, specialists and agents can create documentation, letters and agreements for borrowers. They can also create extended repayment plans for borrowers who have defaulted. Through a streamlined process flow, loan specialists can review required terms, conditions, amortization schedules, disbursement schedules, collateral management, repayment plans and more. Managers can assigns pending tasks to specialists and can create alerts for upcoming activities and important dates. Servicing agents can manage their assigned loans throughout the entire servicing lifecycle. If a particular loan falls behind in payments, collections agents can manage "delinquent" or "in defaulted" loans with the integrated workflow tools. And, critical to accurate reporting, loan accounting is automatically generated throughout the loan lifecycle to create appropriate general ledger journals.

Know and Manage Your Portfolio

Lending organizations and agencies need comprehensive, real-time information about their loan portfolio so they can make prudent decisions. Portfolio reconciliation reports provide a comprehensive view of all loans in your portfolio. Lending agents review percentages of loans by status and can reconcile billing and payment issues. Additionally, the system provides quick access to updated borrower information so collection agents and specialists can make well-informed customer support decisions. And with the borrower qualification module, agents can drill deeper into the borrower's profile to understand the financial status.

Letter, Document and Agreement Creation

Note Dashboard support the easy creation of standard and custom borrower communications, letters, forbearance agreements and loan modifications.

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Lower Loan Servicing Costs and Improve Customer Satisfaction

Piecing together critical information regarding loan and borrower history can be difficult if not impossible with the obstacles of disjointed electronic records and incomplete and scattered paper files. With Note Dashboard, loan agents have immediate access to critical loan information and short cuts to common tasks and loan information requests—all from a central screen. They also have quick access to Billing, amortization and payment details for problem resolution and can review all statements for billing clarity.

Simplify with a Centralized Dashboard

Note Dashboard provides a central focal point for specialists and servicing agents. From the dashboard, agents have a single view of all of their loans. They can then drill into details about each loan and navigate into servicing functions based on loan status. The creation of tasks can inform agents of loan status changes or when review and approval is required.

Reduce Delinquency and Default Rates on Loans and Extended Repayment Plans

Lending organizations and servicing companies must aggressively minimize loan loss rates while strictly adhering to collections regulations or face fines by regulators. Note Dashboard offers automation to ensure the appropriate recovery strategies are initiated. Lending organizations require flexible definitions for "delinquent" and "defaulted" loans and schedule dunning notifications, collections calls, and customer site visits to effectively collect the loan. Collections agents process payments, promises, or refusals while negotiating the troubled loans. All customer interactions and notes are tracked so any loan agent or collector can access all aspects of the centralized borrower record.

Manage Compliance and Regulation

Servicers and agencies must adhere to stringent state and federal government regulations to remain compliant and to avoid disciplinary actions. Loans can begin from one or more outstanding receivable that is later converted into a loan or extended repayment plan. Extended repayment plans must follow terms, conditions, and interest rates that were published at the time the receivable was created, but must also be flexible enough to respond to borrower needs. Original receivables are automatically adjusted based on the extended repayment plan terms.

For more information, please contact us at 1-800-341-9980 or info@notedashboard.com