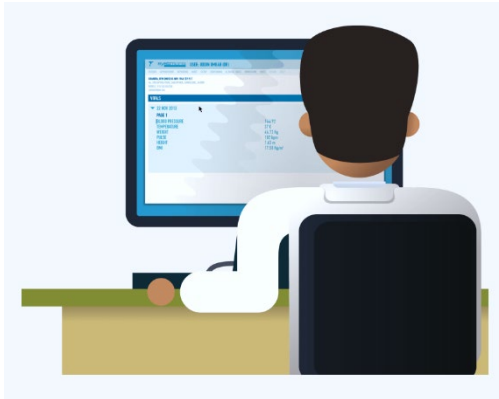# The AcuLoan User Experience

The AcuLoan solution for Acumatica is built for users to have everything they need to manage their loan accounts in one place. The user experience is meant to be simple, compact, and manageable for anyone. Within AcuLoan users can document the application process, assets and approve an application, and manage the payment process. One platform for all these processes makes it seamless for an entire team to collaborate and work on the same loan accounts.

Creating a Loan Account

Within the Loan Account portion of the AcuLoan workspace, users will be able to create a new loan with preferences that have be pre-set in the system. Information that is necessary for the loan account includes business account, loan class, loan description, and payment method. Users will be able to set the dates for the loan and select the rate and amount of the loan on this single screen. Not only does this screen handle the transactions after the loan has been approved, but all the information also collected during the application process is entered into this screen as well. See below for an example of what this screen looks like. This screen provides all information necessary for the lifecycle of the loan.

Dashboards

AcuLoan has its own dashboard that can be configured to best fit your needs. This dashboard is configured and designed the same as any other dashboard in Acumatica using the design feature along the top right-hand side of the screen (you can see this in the screen shot below). The AcuLoan dashboard is called the Loan Book Overview. In the screenshot below users can see items such as total loan book value, loans in development, and receipts payments received. If this information is not relevant for all users of AcuLoan, other dashboards can be created with some widget from the Loan Book Overview and the same widgets can be added to existing Acumatica dashboards (i.e., the Controller Dashboard.)
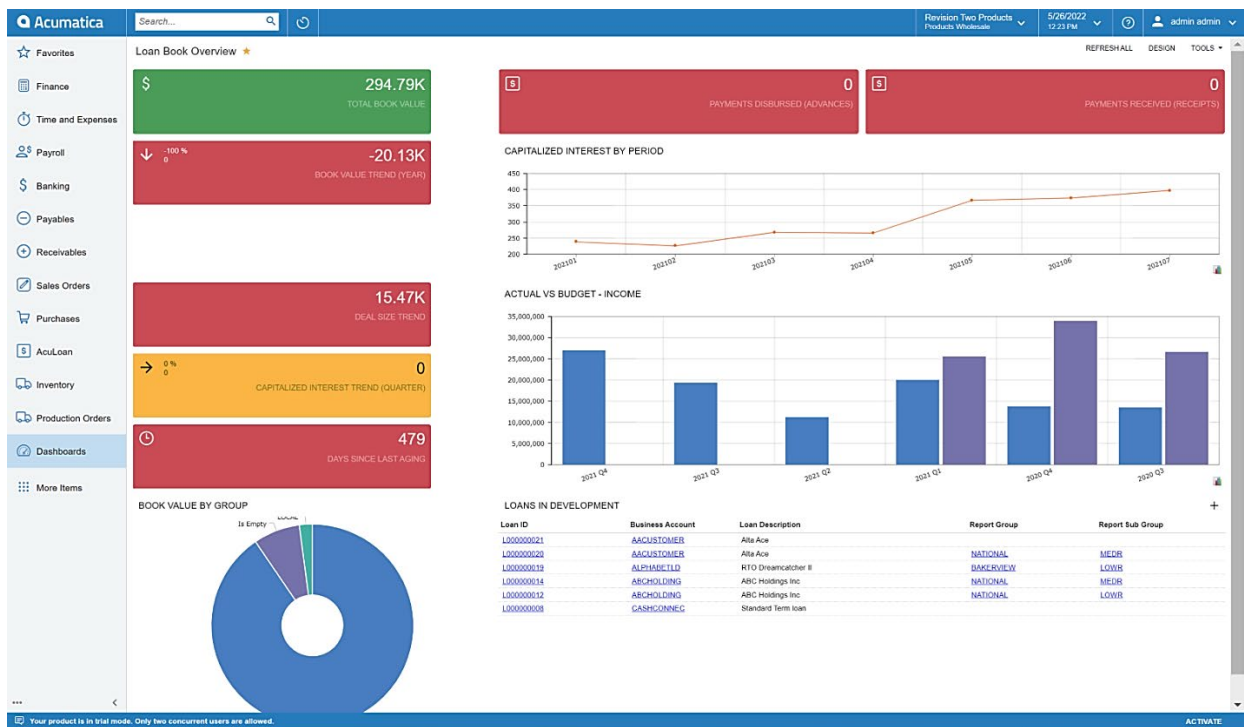
Other Reporting

In addition to dashboards, within the AcuLoan solution there are several reports that can be run to help users see how loans within the system are performing and which loans may need special attention. Some of these reports include report statements, capitalized interest history, age analysis, and loan schedules. These reports are run the same way as reports in Acumatica with just a few clicks of a button. On the next page we take a closer look at these loan schedules.

Loop Schedule

Loan Schedule

[toolbar: save, undo, +, delete, copy ▾, |<, <, >, >| CALCULATE   PRINT]

Schedule Nbr:	LS00000009 🔍	* Start Date:	8/4/2021 ▾	Term:	60	TOTALS
Loan Nbr:	L000000009 🔍	Initiation Fee:	0.00	Interest Rate:	0.00	Payments/Installm... 410,733.33
Interest Method:	Fixed ▾	Loan Value:	254,000.00	Services:	2,500.00	Interest: 0.00
* First Installment D...	9/3/2021 ▾	Residual Amount:	0.00			Services: 152,500.00

		Term	End Date	Installment Amount	Interest Amount	Total Services	Balance
>	𝖣	0	8/31/2021	0.00	0.00	2,500.00	254,000.00
	𝖣	1	9/30/2021	6,733.33	0.00	2,500.00	249,766.67
	𝖣	2	10/31/2021	6,733.33	0.00	2,500.00	245,533.33
	𝖣	3	11/30/2021	6,733.33	0.00	2,500.00	241,300.00
	𝖣	4	12/31/2021	6,733.33	0.00	2,500.00	237,066.67
	𝖣	5	1/31/2022	6,733.33	0.00	2,500.00	232,833.33
	𝖣	6	2/28/2022	6,733.33	0.00	2,500.00	228,600.00
	𝖣	7	3/31/2022	6,733.33	0.00	2,500.00	224,366.67
	𝖣	8	4/30/2022	6,733.33	0.00	2,500.00	220,133.33
	𝖣	9	5/31/2022	6,733.33	0.00	2,500.00	215,900.00
	𝖣	10	6/30/2022	6,733.33	0.00	2,500.00	211,666.67
	𝖣	11	7/31/2022	6,733.33	0.00	2,500.00	207,433.33
	𝖣	12	8/31/2022	6,733.33	0.00	2,500.00	203,200.00
	𝖣	13	9/30/2022	6,733.33	0.00	2,500.00	198,966.67
	𝖣	14	10/31/2022	6,733.33	0.00	2,500.00	194,733.33
	𝖣	15	11/30/2022	6,733.33	0.00	2,500.00	190,500.00
	𝖣	16	12/31/2022	6,733.33	0.00	2,500.00	186,266.67
	𝖣	17	1/31/2023	6,733.33	0.00	2,500.00	182,033.33
	𝖣	18	2/28/2023	6,733.33	0.00	2,500.00	177,800.00

Taking the Next Steps Toward Your Loan Management Tool

AcuLoan for Acumatica is built with the user experience in mind. Keeping this simple, AcuLoan has everything users need to manage their loan accounts within one platform.

If your company is ready to take the next steps and see how AcuLoan can better suit your loan management needs, don't stop here. To learn more about AcuLoan for Acumatica request a free demo – visit us online!

Polaris Business Solutions would love to help you find the right ERP system to suit your needs for your loan management. You can find more helpful information about Acumatica, Polaris Business Solutions and more at www.polaris-business.com.

WHAT'S NEXT?