Sales

Dashboard	Lead Board	Leads Grid	Application Board	Application Grid	All/Mine

LEADS
Total
Worked Today
Worked Last 7 days

APPLICATIONS
Pending
Loans
Merchant Only
Lenders

APPLICATIONS
Submitted to Underwriting
Today
Merchants Only
Loans

SALES CALL LOG
Inbound
Outbound
Average wait

Graph showing
New Leads
New Applications from Leads
New Merchants
[show last 7 days]

LEAD STATUS DOUGHNUT CHART

APPLICATION STATUS DOUGNUT CHART

CHART SHOWING APPLICATIONS SUBMITTED
APPLICATIONS BOARDED
Last 7 days

New Accounts

Dashboard	Board	Grid	Underwriting		All/Mine
			Board		
			Grid		

APPLICATION RECEIVED
TODAY
Received
Merchant Only
Borrower
Lender

LOANS APPLIED FOR
TODAY
#
$

APPLICATION TRIAGE
Automated – App - Decl
Semi-Auto – App - Decl
Manual – App - Declined

DECISION
TIMES
Automated
Semi-Auto
Manual

Line GRAPH
APPS
Merchant Only
Borrower
Lender
[last 7 days]

DOUGHNUT GRAPH
LOANS APPLIED FOR
TODAY IN $10K
INCREMENTS

DOUGHNUT GRAPH
LOAN APPLICATIONS BY
BUSINESS TYPE

SCORES OF LOAN
APPLICANTS
[2 scores]
[last 7 days]

Underwriting

Dashboard | Board | Grid | All/Mine

MERCHANT ONLY APPLICATIONS
Validation - #
Pended
Req. Review
Approved
Boarded
[Today]

LOAN APPLICATIONS
Validation # - $
Pended # - $
Req. Review # $
Approved # - $
Auction # - $

MERCHANT ONLY CURRENT TRIAGE
AUTO #
SEMI-AUTO #
MANUAL #

LOAN CURRENT TRIAGE
AUTO #
SEMI-AUTO #
MANUAL #

VERTICAL BAR CHART
MERCHANT ONLY APPLICATIONS
Validation - #
Underwriting
Approved
Boarding
[past 7 days]

VERTICAL BAR CHART
LOAN APPLICATIONS
Validation # - $
Underwriting # - $
Approved # - $
Auction # - $
[past 7 days]

LINE CHART
MERCHANT ONLY CURRENT TRIAGE
AUTO #
SEMI-AUTO #
MANUAL #
[past 7 days]

LINE CHART
LOAN CURRENT TRIAGE
AUTO #
SEMI-AUTO #
MANUAL #
[past 7 days]

LOAN PERFORMANCE 90 DAYS
Total Funded:
  $5M
  10K Loans
Total Defaults:
  $5K
  5 Loans
  Default Rate: X%
Financial Defaults:
  $3K
  3 Loans
  Financial Default Rate: X%
Fraud Defaults:
  $2K
  2 Loans
  Fraud Default Rate: X%

LOAN PERFORMANCE TO DATE
Total Funded:
  $50M
  100K Loans
Total Defaults:
  $50K
  50 Loans
  Default Rate: X%
Financial Defaults:
  $30K
  30 Loans
  Financial Default Rate: X%
Fraud Defaults:
  $20K
  20 Loans
  Fraud Default Rate: X%

Customer Service

Dashboard	Merchants	Auctions	Loans	Lenders	Tickets	All/Mine

TODAY'S MERCHANTS
CALLS
Completed
LIVE NOW
OPEN TICKETS

TODAY'S AUCTIONS
CALLS
Completed
LIVE NOW
OPEN TICKETS

TODAY'S LOAN
CALLS
Completed
LIVE NOW
OPENTICKETS

TODAY'S LENDER
CALLS
Completed
LIVE NOW
OPENTICKETS

Line graph
MERCHANTS
CALLS
Completed
OPEN TICKETS
[7 days]

Line Graph
TODAY'S AUCTIONS
CALLS
Completed
OPEN TICKETS
[7 days]

Line Graph
TODAY'S LOAN
CALLS
Completed
OPENTICKETS
[7 days]

Line Graph
TODAY'S LENDER
CALLS
Completed
OPENTICKETS
[7 days]

MERCHANT PROCESSING - Today

Today:	#	$
Total Batches:	100	100K
Cases Flagged:	10	30K
Funds Held:	3	10K
Funds Released:	3	10K
Funds Not Decisioned:	4	10K
Chargebacks Received:	2	10K
Rejected CB Debits:	1	5K

MERCHANT PROCESSING

Total:

Batches on Hold: 25 10K

Avg Days on Hold: 2.5

7-Day Case SLA: 1 Day

Collections Balance: 50K

MERCHANT RISK HIGHLIGHTS

Excessive increased Volume - # $

Excessive Increased Ave. Ticket - # $

Excess Keyed Transactions (Day) - # $

Excess Keyed Transactions (Month) - # $

Negative Batch # $

Duplicate Card Transactions # $

Duplicate Dollar Transactions # $

Duplicate Similar Card Transactions # $

Credit Ratio Increase # $

Credits Exceed Ave. Ticket # $

Excess Credit Transactions # $

LOAN PROCESSING - Today

	#	$
Total Payments:	5214	1,824,019

PAYMENT PERFORMANCE

Actual v. Expected	#	$
71-90% --		
50-70% --		
< 50% --		
In Collection	**#**	**$**
Level 1		
Level 2		
Legal		

CHART – FILLED LINE
CHARGEBACKS
Filed #
Reversed #
Collected #
[60 days]

CHART – FILLED LINE
CHARGEBACKS
Filed $
Reversed $
Collected $
[60 days]

LINE CHART
Payment Performance
>89% #
71-90% #
50-70% #
<50% #
[60 days]

LINE CHART
Payment Performance
>89% $
71-90% $
50-70% $
<50% $
[60 days]

Collections

Dashboard	Board	Grid	Reports		All/Mine

PAYMENT PERFORMANCE
Actual v. Expected
71-90% --
50-70% --
< 50% --

NEGOTIATED SETTLEMENTS
@ 100%
@ 90-99%
@80-89%
@70-79%
@60-69%
<59%

CALL ACTIVITY
QUEUED FOR CALLING
CALLS MADE TODAY
CONTACTS MADE TODAY

LEGAL ACTIVITY
Letter sent
Second letter
Suit Filed
Judgments

LINE GRAPH
Actual v. Expected
71-90% --
50-70% --
< 50% --
Last 30 days

LINE GRAPH
Write-off %
Since the beginning

LINE GRAPH
Projected Annualized NAR
Projected Annualized Adjusted NAR
Since the beginning

LINE GRAPH (filled)
FUNDS COLLECTED
By Collection effort
Since the beginning

Profile
Users (if)
About

_____
Logout