

capta**loans**

TRACKING AND PIPELINE ANALYSIS



BASIC PLAN

Designed for single office environments

Start with a 3 user subscription with unlimited usage
Add additional users to meet your needs

BASIC PLAN

Captaloans is a web based application that provides you the tools to track, manage, and analyze your mortgage business - anywhere and anytime. Share and collaborate basic loan information securely over the internet with customers, loan officers, coordinators, and managers. At the same time analyze the effectiveness of your mortgage business through checklists, audits, and pipeline summaries.

Captaloans was designed with mortgage professionals in mind. It can work in conjunction with existing loan origination programs and requires no software to install. All you need is a PC, an internet connection, and web browser. Its intuitive design makes it easy to start using the application within minutes of signing up.

“The Console”

The console provides secure access to account and loan information. Navigational tabs allow quick access to loan records, pipeline summaries, and management tools.

Navigation Tabs

provide easy access to features like:
Open and Closed Loans,
Pipeline / Funded Summaries,
and Account Management.

Console

provides users secure access to captaloan functionality.

Who's On

account information is always present.

The screenshot shows the Captaloans web application interface. At the top, there is a navigation bar with tabs for 'Loans', 'Reports', 'Tools', and 'Account'. Below this, there are sub-tabs for 'Opened', 'Closed', and 'New'. The main content area is titled 'Opened Loans' and contains a table with columns: Loan Number, Borrower, Purpose, Status, Quick View, Opened Date, Assigned To, Last Modified, and Amount. The table lists six loans with a total amount of \$2,355,000. At the bottom of the page, there is a footer with links for 'Home', 'Transactions', 'Account', 'Tools', 'Privacy', and 'Terms Of Service', along with copyright information for 2007 Interactive Ideas, Inc.

Loan Number	Borrower	Purpose	Status	Quick View	Opened Date	Assigned To	Last Modified	Amount
LAX10023	Jacob Lynch	Residential - Refinance	Submitted	N/A	Jan 04, 2007	Mark Bell	2007-01-04 00:58:24	\$450,000
LAX10026	Mike Osuna	Residential - Refinance	Submitted	N/A	Jan 04, 2007	Mark Bell	2007-01-04 00:57:38	\$400,000
LAX10033	Lawrence O'Reilly	Residential - HELOC	Approved	N/A	Jan 04, 2007	Mark Bell	2007-01-04 00:58:36	\$155,000
LAX40012	Jane Wilson-Lane	Residential - Purchase	Opened	N/A	Jan 04, 2007	Mark Bell	2007-01-04 00:56:08	\$550,000
LAX4004	Lydia Gonzalez	Residential - Purchase	Opened	N/A	Jan 04, 2007	Mark Bell	2007-01-04 00:47:20	\$600,000
LAX4312	Romero Jimenez	Residential - Refinance	Opened	N/A	Jan 04, 2007	Mark Bell	2007-01-04 00:59:48	\$200,000
Total:								\$2,355,000

Workplace
data is organized,
easy to read, and
accessible.

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www.captaloans.com
info@captaloans.com



Features:

- Create, manage, and track loan records.
- Loan aging indicators and email notifications.
- Basic reports and quick pipeline summaries.
- Allow your customers to view their loan status online.
- Audit tracking to see when a loan record was updated and by whom.
- Manage user accounts.

Benefits:

- Get loan status more effectively.
- Loan agents can easily track and monitor their pipeline.
- Reduce phone calls and customer frustration by allowing customers online access to their loan status.
- Managers can easily track the pipeline of their loan agents.
- Web based - Manage your pipeline from any location with no software to install.
- Flexible subscription plan. Create or delete user subscriptions as needed.

Requirements:

- Internet connected computer.
- Internet Explorer 5.0+, Firefox 1.5+, or compatible browser.

For More Information

visit the captaloans website

<http://www.captaloans.com>

email captaloans

info@captaloans.com

call captaloans

800 480 5881

interactive demonstration

<http://demo.captaloans.net>