

# RAPPORT® ORIGINATIONS

## ACCELERATE DEALS & AUTOMATE PROCESSES

### STREAMLINE THE ORIGATION PROCESS FROM START TO FINISH

From the first interaction with a new customer through quoting, credit decisioning and documentation, Rapport® automates deal flows and provides exceptional data transparency and auditability. The solution is designed to reduce risk, accelerate applications, improve customer service and free your team to focus on growing your business.

### KEY ATTRIBUTES

- ✓ **AUTOMATE DEAL FLOWS:** Speed transactions with automated processes for each step of the origination process, from administrative workflows to advanced analytics and decisioning.
- ✓ **DIGITAL EXPERIENCES:** Pre-built APIs let you connect with other systems, simplifying workflows through Rapport® integration in your broader ecosystem.
- ✓ **E-SIGNATURES:** Enable simple document sharing, tracking and electronic signatures through seamless integrations with many leading providers including eOriginal, DocuSign, or Adobe Sign.
- ✓ **MOBILE ACCESS:** Tap into vital Rapport® functions from any location through smartphones, or other connected devices.
- ✓ **SALESFORCE INTEGRATION:** Collect and send customer, dealer and application data, keeping Rapport and Salesforce updated in real-time.

### RELATED SOLIFI SOLUTIONS

## InfoLease®

Asset finance organizations worldwide choose InfoLease® because it provides a rock-solid foundation for their organizations. Built on business logic that shaped the industry and has been continuously updated over 40 years, InfoLease® brings automation and actionable insights to the entire portfolio management process — spanning contract management, billing and invoicing, taxation and end-of-term.

### SOLIFI SaaS

Solifi SaaS offers the industry's best-selling origination and portfolio management software as a true software as a service (SaaS) solution. You only pay for what you use — and you get powerful new tools for that allow you to capitalize on current opportunities and quickly scale up to accommodate higher volumes, new markets or additional asset classes.

## NEW! RAPPORT® 7.4 HIGHLIGHTS

### Expanded Credit Facility.

Streamlined workflow processing. Added ability to create documents and add attachments. Enhanced integration between lenders, credit facilities and applications, making captured data readily available at each step.

### Dealer Programs.

Rapport users can now add groups automatically within applications and contract setups associated with dealer programs. Straightforward set-up and easy maintenance of dealer programs bring new levels of simplicity to the process.

### Universal Admin.

User maintenance tasks are available on the web with new responsive design technology allowing Rapport 7.4 users to login from any connected device — regardless of screen size — and easily create users, unlock a user, clear user sessions, or modify roles.

### Streamlined Application Entry.

Rapport deployments offer the ability to be extended to a variety of "external" authorized users. Rapport 7.4 simplifies the origination process for dealer channels and other users driving business to Solifi customers.

### Drawdowns for Existing Revolving Accounts.

After an initial revolving account is booked to InfoLease, Rapport users can now enter the new drawdown details, provide customers with documentation, and book the drawdown to InfoLease in one highly automated process.

### **ANALYTICS & DECISIONING**

Improve risk management and gain actionable insights by applying advanced analytics to your decision processing. Predict outcomes with decision trees and scorecards to provide structured and consistent decisioning.

### **RISK-BASED PRICING**

Risk-based pricing capabilities allow you to quickly provide quote options to your customers on even your most complex asset financing structures. Online and offline pricing solutions are available when using mobile devices.

### **VENDOR / DEALER CHANNELS**

Extend Rapport® to your partner channels through configurable branded portals, easily collecting deal details and viewing progress. As you build out your partner relationships, program details can default to new deals to streamline the entry process.

### **FLEXIBLE CONFIGURATION**

Streamline your business flow by tailoring workflows, user interface, and business rules to support your specific business needs through easy-to-use administrative tools.

### **CONNECTED EXPERIENCE**

Rapport® supports the ability to integrate with one or more back-office systems allowing a single access point to all your portfolio management platforms. Providing a complete and real-time view of customer risk across all connected systems.

### **CREDIT FACILITIES**

Give your customers the flexibility to acquire the assets they need efficiently — without having to submit entirely new applications each time. More buying power for them, smoother operations for you.



[solifi.com](http://solifi.com)

#### **About Solifi**

IDS, William Stucky & Associates, and White Clarke Group are now Solifi, delivering a solid financial technology foundation for equipment finance, working capital, and automotive finance firms. At Solifi, we believe that commerce is only as strong as the system it runs on. Our mission is to reshape finance technology by bringing together proven solutions into a singular powerful technology platform designed to help you protect and scale your business. We guard your company by being precise and reliable, we use proven solutions to guide you to the right opportunities, and we help you grow by unleashing the potential of your business. For more information, please visit [www.solifi.com](http://www.solifi.com)