Alogent

Streamline Your Loan Approval Workflow

AccuApproval turns loan approval into a manageable process in AccuAccount. Reduce inefficiency, increase collaboration, and accelerate time to close.

Routing & Approval

Automated Emails

Application Management
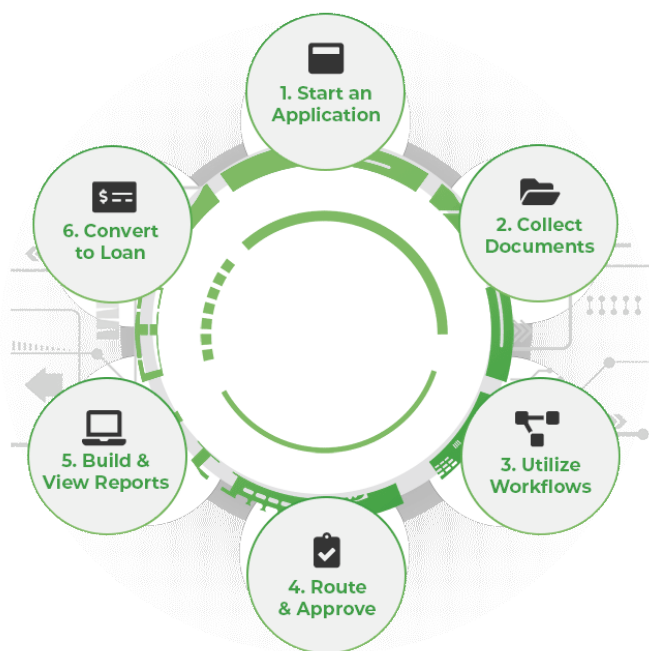
Simplified Tracking

Customisable Workflows

Pipeline & Productivity

1. Start an Application

2. Collect Documents

3. Utilize Workflows

4. Route & Approve

5. Build & View Reports

6. Convert to Loan

Utilize workflows that mirror your lending process.

Works with all of your loan types: commercial, mortgage, lines of credit, agricultural—even renewals. Track changes in the application status. Users or groups receive email notifications when action is required. Management can check on statuses at any point in time.

Electronically route and approve loans.

Emails notify credit analysts, underwriters, doc prep, and others to take action and process the application in a timely manner. Loan processors, lenders, managers, and admins can be notified each time a step is taken. Utilize approval limits or allow committees to mark applications as approved or denied.

View relationships and easily start new applications.

Access credit documents, loan and deposit information, and relationships for existing customers. Consolidate customer information from multiple sources. Track potential customers and lending opportunities in a scalable, flexible system. Connect to your CRM and other banking systems for additional efficiency.

Easily track application status and lender productivity.

Keep management informed about pipeline value, profitable opportunities, and other important metrics. Get reports by branch, lender, loan product, application status, and much more.

Collect your documents and display them intuitively.

Share documents with other users and departments as they are received. Credit documents and applications are organized and instantly available to other users and teams, which speeds up the approval process.

Convert applications and retain all relevant information.

Convert applications to booked loans in seconds. Retain the application's history and documents on the newly booked loan. Withdrawn and declined applications are retained for historical purposes.