

Keep Connected

Secure on-the-go access to TEA's account and loan-related data from a sleek web-based portal.

Affordable, tiered pricing (based on the number of active loans in your portfolio) allows organizations big and small to offer online access to their clients and staff.



The Online Client & Staff Portal for TEA 10 is a sleek web-based portal that offers both clients and staff secure and private online access to synchronized account and loan-related data from TEA, 24 hours a day, seven days a week. It provides your clients with a highly desired and convenient self-help environment for ascertaining balances, account status, statements and more while also assisting staff members by providing access to account and management information in the field.

The portal also provides the ability to communicate with your entire active client base by broadcasting important messages. It can also be used to distribute documents to your clients and to receive required documentation from your clients electronically.

The portal is customizable and can be branded to include your company logo and corporate colours enabling you to provide a professional online presence while maintaining your organization's identity.

The portal will render on any device, in any browser creating true on-the-go access allowing staff to stay connected anytime, anywhere. Staff and clients alike will love the ease of access and convenience provided by the online portal.

If you have any questions or require additional information regarding this product, please contact:

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KEY FEATURES

- ❖ Loan Information (Original Date, Original Value, Loan #, Term, Amortization, Maturity Date, Interest Rate, Loan type)
- ❖ Outstanding Balances (Principal, Interest, Fees, Total Balance)
- ❖ Delinquency Information (30, 60, 90, Current, Amount, Days)
- ❖ Payment Summary (Year-to-Date, Inception, Last Payment with break down, Next Payment Date & Amount, Per Diem Rate)
- ❖ Account Information (Loan Officer with address, phone and email, Account Manager with same details, Primary Contact and Business Information)
- ❖ Messaging Center so you can broadcast messages to your entire client base
- ❖ File Attachments so clients can upload financial statements and other required documents
- ❖ Customized Portfolio Reporting for Loan Officers and Account Managers
- ❖ Download Center where monthly/annual statements, audit confirmation letters and 1098/1099's are uploaded from TEA and clients can upload files such as financial statements
- ❖ Customizable interface incorporating your company logo and selectable colour theme to maintain your organization's identity

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Tiered Pricing Model

The cost of the Online Client & Staff Portal for TEA 10 is based on the volume of active loans in your portfolio providing organizations of all sizes an affordable online solution and is billed annually.

Active Loans	Monthly Pricing	Annualized	One-Time Install ¹
0 - 50	\$40	\$480	\$500
51 - 100	\$60	\$720	\$500
101 - 200	\$100	\$1,200	\$500
201 - 500	\$150	\$1,800	\$500
501 +	please call	please call	\$500

¹ The One-Time Install fee is payable at the time of purchase and includes initial portal installation and basic configuration.

Installation & Setup

A one-time \$500 installation fee for the initial client portal installation and configuration is applied at the time of purchase. We ensure that your Portal is setup exactly as you desire and that all features you want to use are configured properly and ready to roll out to your staff and clients. This professional setup includes:

- ✓ Installation and setup of the portal on our servers
- ✓ Setup and customization of TEA synchronization to portal
- ✓ Advanced customization of portal including e-mail templates and fields
- ✓ Corporate branding - incorporation of your company logo and color theme to give your portal a polished and professional look in line with your corporate identity

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