

Loan Portfolio Management System

Project:
Loan Portfolio
Management System

Business Industry:
Finance

Duration:
3 man months

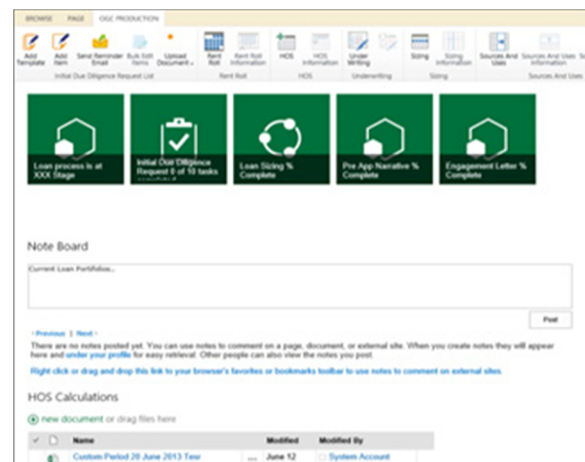
Technology:
Microsoft SharePoint
Server 2013

Problem Background

Client was using SharePoint 2013 as content management solution for managing Loan Portfolios for its customers. Apart from Content Management capabilities, client also wanted to create a process where in the client's loan portfolio data which consists of Rent Rolls, Under Writings, Sizing should be processed in a way so as to give the loan value in monetary terms with other financials, like Adjusted Acquisition Price, LTC constrained loan amount, Under Writing at Actual Rate, Maximum allowable mortgage to name a few. These calculated values then can be shared with other financial institutions and customer could be provided best loan rate based on the portfolio.

TechPerspect's Solution

Custom solution over SharePoint was proposed to the client. All the loan Portfolio data was managed in Office Excel and various formulas were created in Excel spreadsheets to provide run time calculation of business data. These values were then saved in calculated fields and were picked by SharePoint API to store in various custom columns for easy access. The solution provided easy access to all the content for a particular client.



Solution Features

- Data stored in Excel spreadsheets, enabling easy and quick calculation of loan amount and other financials
- End result for each excel is extracted with the help of Excel Services
- Data can be easily shared with multiple banks/financial institutions to get the best possible rate

Business Impact

- Reduced costs & increased output from shorter and more efficient process
- Quick and easy access to all information & documents for a particular case
- Mitigating chances of error in calculating financial data

Client Speaks

“TechPerspect’s solution is much more than a software package. It is a business tool backed by an outstanding team that helps provide us a better product to our customers and realize a higher operating efficiency.”

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