

Sage Intacct Lending Management

Streamline Loan Servicing. Scale with Confidence.

Organizations that lend money often rely on spreadsheets, manual calculations, and disconnected systems to manage servicing activities. As lending portfolios grow, these processes become difficult to manage, creating operational inefficiencies, reporting challenges, and increased risk.

Sage Intacct Lending Management is a purpose-built lending solution that helps organizations streamline and scale loan servicing by **automating** manual processes, **centralizing** lending and financial data, and **delivering** real-time visibility across the entire loan portfolio.

Managing loans using spreadsheets and disconnected systems often results in significant operational challenges, including manual loan servicing processes, time-consuming reconciliations between lending and financial data, and limited visibility into your loan portfolio performance. Manually managing tasks such as interest calculations, amortization schedules, payment processing, reporting, and borrower activity manually increases the risk of errors, reduces efficiency, and makes it difficult to scale lending operations or gain timely insight into portfolio health and performance.



Why Sage Intacct Lending Management?



Automate loan servicing and improve accuracy

Replace manual processes with automated workflows designed to reduce administrative effort and improve operational consistency.



Centralize lending and financial data

Manage loan servicing and financial management within a single platform and eliminate time-consuming reconciliations.



Gain real-time portfolio visibility

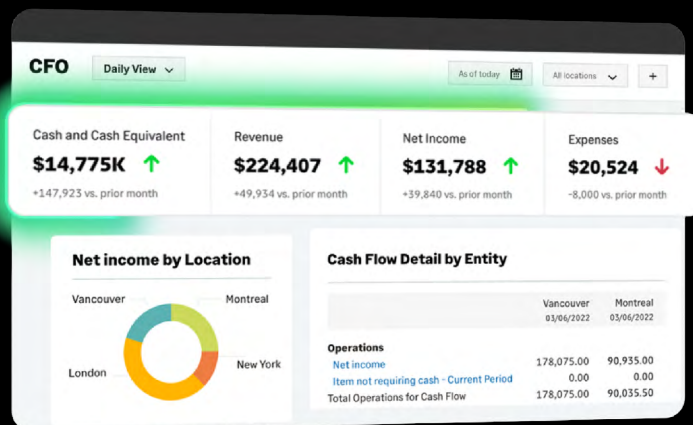
Monitor loan activity, balances, payments, interest and portfolio performance through centralized reporting and operational dashboards.



Scale without increasing complexity

Support growing loan portfolios through standardized processes and automation that enable growth without proportional increases in staffing.

Leverage the power of Sage Intacct Lending Management to streamline and automate loan servicing, delivering greater operational efficiency, real-time portfolio visibility and increased accuracy while enabling you to scale without added complexity or administrative burden.



Lending operations in a single system of record

- Eliminate manual reconciliations between lending operations and finance
- Centralize loan servicing, accounting, and reporting activities
- Create a trusted source of truth for loan and portfolio data
- Improve consistency across lending and financial processes

Automated loan servicing

- Automate amortization schedules and payment schedules
- Automatically calculate interest and accruals
- Streamline re-amortizations, payoffs, adjustments, and fee management
- Reduce spreadsheet dependency and manual administration

Real-time portfolio visibility

- Monitor balances, interest activity, invoices, and statements
- Track performance by borrower, loan type, or lending program
- Access detailed loan and portfolio reporting
- Improve decision-making with real-time insights

Built for growth

- Manage hundreds or thousands of loans efficiently
- Support revolving and non-revolving loan structures
- Standardize servicing workflows across the organization
- Reduce operational bottlenecks as portfolios expand

Sage Intacct Lending Management offers:

- Native, in-product solution
- Integrated AR workflows
- Loan funding and disbursement
- Payment schedules and collection
- Payoff processing and loan closure
- Amortization schedules
- Fixed and variable interest calculations and accruals
- Fee assessments and management
- Support for revolving and non-revolving loans
- Loan portfolio performance
- Automated statement generation and historical statement archive



High-Performance
Finance Software

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