lodo
SOFTWARE

Small Business Finance Manager

- Build loyalty – simplify money management for consumers and small businesses
- Drive online business – brand and integrate with online banking systems to enhance their value
- Grow revenue – leverage a holistic view of customers' accounts to cross-sell and attract new assets and deposits

Financial institutions can use OurCashFlow to transform their bank web site into a valuable tool for small business owners.

Consolidated account view – Our software connects business owners to their online accounts at multiple institutions, providing convenient access from a trusted portal.

Separation of business and personal data – The small business module of OurCashFlow integrates with the consumer PFM module. This allows users to keep business expenses separate from personal, and to track that the business reimburses its owner for purchases made from their personal accounts.

Automated expense categorization and reporting – Our categorization engine uses a patent-pending approach to automatically gather daily financial data and categorize expenses for bank customers. If users want to re-categorize transactions, a drag-and-drop feature makes it quick and easy. The tool also allows business owners and their employees to easily submit and reimburse business expense reports online.

Online invoicing – This feature lets users create custom invoices that can be remitted online or by printing and mailing. OurCashFlow lets business owners track invoices and automatically send reminders to customers when they approach their due dates or become past due. It also matches deposit transactions with invoices for status tracking.

Financial reports – Reports are generated in real-time and are readily available to the business owner to print or email to their accountant, investors or others. Reports can be exported in digital format for import into other accounting tools or tax preparation software.

Business budget wizard – A simple tool guides users through a bottoms-up process for creating budgets within minutes, and once created, provides the means to track activity against the plan.

Spending alerts – Business owners can choose to be alerted when they approach budgeted limits in any given expense category. Alerts can be sent to an email address or cell phone number.

User friendly interface – Users don't need any accounting knowledge to take advantage of our online financial management tool. Based on Rich Internet Application (RIA) technology, features like drag-and-drop and dynamic charting make working with the PFM easy.

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Implementation Services and Support – Lodo provides end-to-end services to ensure a successful implementation of our software for each customer. Services include:

- Project management support to plan and oversee the steps required to install, test and go-live
- Installation support including on-site technical support
- Integration support to configure and integrate our software with online banking sites, core banking, check image and single sign-on systems
- Training and documentation including online help to support end-users
- 24-hour hotline for assistance with technical and operational issues
- Periodic new releases that offer updates and enhancements
- Account management to provide customers with a primary support contact after go-live