

COMMERCIAL BANKING SOLUTIONS

Simplify your credit review process with Virtual Loan Assistant™

Virtual Loan Assistant™ is the first Microsoft PowerApp designed to improve the credit review process for financial institutions with commercial lending operations.

SUPER-CHARGE LENDING PRODUCTIVITY

**Your bankers need to lend.
So why keep them behind their
desk doing administrative work?**

Virtual Loan Assistant (VLA) frees your commercial lending team from low-value, time-consuming work so they can spend more time building relationships with valued clients and prospects.



**With four distinct features
that help both you and your
staff, VLA streamlines credit
operations, improves
oversight, and boosts job
satisfaction.**



Real-time reporting on credit reviews and outstanding requirements



Instant notifications about progress and the status of documents



Activity tracking for emails, phone calls, and notes regarding follow-up



Relationship mapping between customers, advisors, and bank employees

SAFE, SECURE, AND TRUSTED TECHNOLOGY

TrellisPoint is a Microsoft Partner dedicated to planning, implementing, customizing and integrating Microsoft Dynamics 365, the Power Platform and related business applications for corporations. We developed the Virtual Loan Assistant application to exclusively service banks with commercial lending operations so they can tap into one-of-a-kind loan administration features with speed and efficiency.

Not only will you rest knowing that your data is safely stored in Microsoft's secure cloud platform, you'll also save time and money for your organization. In less than 8 weeks, your teams will have a new, hassle-free way to manage credit reviews and reporting requirements so they can spend more time with customers and prospects.



IMPROVE TRANSPARENCY

Virtual Loan Assistant provides dashboards configurable by role, so you can view the data you need in order to effectively manage the credit review process. Detailed information displays with one-click so you can easily view account records, activity by employee, and status information.

Spend time doing the things that matter most.

Contact us today for a FREE personalized commercial credit audit and see how Virtual Loan Assistant™ can benefit your financial institution.

Visit www.trellispoint.com/virtual-loan-assistant