

OR ORCHESTRATION STUDIO

Unified visibility across every system in your lending stack.

A single operational layer across collateral, compliance, servicing, and deal data.
One interface, **without replacing a single platform.**


THE PROBLEM
No system sees the full picture.

Core lending runs servicing. CRMs run pipeline. Collateral, compliance, and origination each live somewhere else. Teams spend hours toggling, manually reconciling, and building reports that are **already stale by the time they're sent.**

THE SOLUTION
One operational layer. No platform swap.

Orchestration Studio sits on top of your existing systems and connects them — giving your team a unified view across collateral, compliance, and servicing with **no migration, no schema conversion, no parallel testing.**



 Cloud-hosted or deployed in your own environment.

The dashboard is titled "Francisco's Dashboard" and includes a search bar and a "Filter" button. It is divided into several sections:

- All deals** (dropdown menu)
- My Opportunities**:
 - \$10M Real Estate**: Amount: \$10,000,000, Stage: Qualified
 - Term Loan · \$25M**: Amount: \$25,000,000, Stage: In Review
- New Deal Applications**:
 - New Construction**: Type: APP, Expires: 10/31/2026
 - Refinance Package**: Type: REFI, Expires: 12/15/2026
- Credit Servicing**:
 - Covenant Review**: Type: Q3 Review, Due: 10/15/2026
 - Amendment Request**: Type: Pricing Adj., Due: 11/01/2026
- My Performance**:
 - Active Loans**: 1,263 (\$944.9M)
 - Closed YTD**: 42 (\$128.4M)
 - ▲ 12% vs Q2**
- To Do** (4 items):
 - Payment Due**: Loan IQ · Due 7/27
 - OFTR - Outstanding Tran.**: Loan IQ · Due 8/13
 - SYG - Paper Clip Request**: CRM · Due 7/30
- Doing** (3 items):
 - Chattel Property Eval**: Collateral · Started 5/22
 - 76F - QTR Outstanding**: Loan IQ · Started 7/01
 - Accrual Cycle Payment**: Loan IQ · Started 7/15
- Done** (12 items):
 - OFAC Search**: Compliance · 7/20
 - Due Diligence Pkg**: CRM · 7/15
 - Covenant Review Q2**: Loan IQ · 7/10
- My Resources**:
 - July 2025 Release**: New functionality available 7/30 · 5pm ET
 - Batch Processing**: Delayed window: 7/28 1:30am UTC

Portfolio Dashboard

Opportunities, deal applications, credit servicing actions, and performance metrics — all in one consolidated view.

CAPABILITIES

One platform over every system you already run.

- Unified Dashboard**: Collateral, compliance, and servicing data in a single view — no platform toggling.
- Real-Time Data Aggregation**: Live data pulled from existing systems into one operational layer — always current.
- Role-Based Views**: Configurable dashboards so portfolio managers, ops teams, and front office each see what matters.
- System Agnostic**: Open API architecture connecting to any REST-capable system in your environment.

OPERATIONAL IMPACT

>30%

Reduction in inquiry time
Measured by Large Enterprise Bank

1

Interface for your entire lending operation
No more toggling to answer one question

1

System to train, support, and maintain
Replaces multi-system training overhead

\$0

Data migration cost
No ETL, no schema conversion, no parallel testing

Every number above comes from a production deployment. Not a projection.

See what unified visibility looks like for your environment.

Walk through the live dashboard, the system connections, and how your team's workflow changes.

Schedule a scoping call

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