Demo evaluation

Monetary

Debt & Lease Management Software

For finance teams working to improve their debt and lease management processes, operate more efficiently, collaborate more effectively, and make more informed decisions, it's becoming increasingly necessary to find better tools. But navigating the evaluation process for new technology can be complex, confusing, and even a bit daunting. **Use this checklist to document the key features you see on product demonstrations** and keep track of which providers offer a solution that meets your needs.

01 · PRODUCTIVITY

How can the solution make you and your team more productive?

CRITERION	MONETARY	PROVIDER 1	PROVIDER 2
Intuitive solution Is the platform easy to learn and use?	☑	☐	☐
Accessible platform Can you work from anywhere, anytime? Will the solution accommodate remote and hybrid work environments?	☑	☐	☐
Integrated workflow Does the system automatically send notifications, task alerts, and other reminders?	☑	☐	☐
Cross-functional collaboration Can you share information and documents amongst teams, departments, and approved external users?	☑	☐	☐
Business continuity support Does the solution provide a centralized framework and reporting process to ensure business continuity regardless of any future staffing or departmental changes?	☑	☐	☐
Single source of truth for data Does the platform create a single source of truth, without needing to maintain debt and lease records in other systems?	☑	☐	☐
Improved decision making Do you have access to comprehensive reporting, enabling you to make more informed decisions with fewer mistakes?	☑	☐	☐

02 · TECHNOLOGY

Does the solution offer cutting-edge, modern technology?

CRITERION	MONETARY	PROVIDER 1	PROVIDER 2
Cloud-based platform Is the platform accessible via internet using a standard browser without the need for software installation on the user's device?	☑	☐	☐
Easy-to-learn user interface Does the platform have a modern look and feel and can you easily perform tasks with minimal clicks and intuitive workflow?	☑	☐	☐
Data visualization Can you manipulate and analyze your data with custom charts, graphs, and dashboards?	☑	☐	☐
Data exports Are all data and reports exportable and compatible with Excel?	☑	☐	☐
Security Is the platform secure and can it protect your data against cyberattacks 24/7?	☑	☐	☐
Continuous updates Does the platform offer continuous new features and enhancements?	☑	☐	☐

03 · VALUE & SERVICE

Does the cost of the solution accurately reflect the value and service provided?

CRITERION	MONETARY	PROVIDER 1	PROVIDER 2
Tiered pricing Does the pricing model take into account your organization's size and needs?	☑	☐	☐
All inclusive Do you get access to all features, with nothing hidden behind an upgrade fee?	☑	☐	☐
Scale as you grow Does the platform allow you to grow your team and department size without incurring additional fees?	☑	☐	☐
White glove onboarding Is the software deployed quickly with minimal burden on your organization?	☑	☐	☐
Training & resources Are client trainings and other resources readily available to help you learn and maximize the value of the platform?	☑	☐	☐
Ongoing account support Do you have access to a resource center and free email, chat, or phone support for the lifetime of your account?	☑	☐	☐

04 · FEATURES

Does the solution offer features to modernize your debt and lease management?

CRITERION	MONETARY	PROVIDER 1	PROVIDER 2
Automated note disclosure Can you prepare accurate, audit-ready notes that meet financial reporting standards?	☑	☐	☐
Comprehensive dashboards Does the platform offer exportable, cutting-edge dashboards and charts that help you visualize your data?	☑	☐	☐
Document organization Can all original source documents be stored in one centralized hub for both debt and lease?	☑	☐	☐
External sharing Are you able to provide free and controlled access to third-party professionals you work with?	☑	☐	☐
GASB 87 lease classification Can the platform identify which contracts fall under GASB 87 compliance requirements?	☑	☐	☐
Lease tracking Can you easily calculate amortization schedules and lease liabilities with the ability to compare lease schedules for in-depth analysis?	☑	☐	☐
Loan tracking Can you track historical debt service payments and model accurate, future payments for the lifetime of the loan?	☑	☐	☐
Journal entries Can the platform generate journal entries at the portfolio or lease level?	☑	☐	☐
Milestone tracking Does the platform track key time-sensitive events, such as call dates and continuing disclosure, and remind you when an event is coming due?	☑	☐	☐
Payment reminders Can you enroll in automated reminders to alert you when payments are coming due?	☑	☐	☐

CRITERION	MONETARY	PROVIDER 1	PROVIDER 2
Payment verification Are you able to log and verify debt service payments with the ability to see which user last updated the payment history?	✓	☐	☐
Schedule creation Can the platform generate valid amortization, payment, and outstanding debt and lease schedules with the ability to export to Excel?	✓	☐	☐
View by type, fund, purpose Does the platform provide a way to seamlessly track, manipulate, and analyze your debt portfolio across multiple categories, filters, and allocations?	✓	☐	☐

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About Monetary

Monetary is powerful, easy-to-use, cloud-based debt and lease management software for finance teams in local government, higher education, and healthcare. Our software helps these teams effectively manage their debt and leases in the cloud, driving efficiency, collaboration, transparency, and informed decision-making within their organizations.

If you'd like to learn more about how your organization can benefit from cloud-based debt and lease management software, request a demo today.

Why Monetary

Cloud based
platform

2,000+
customers

SSO
Single sign-on functionality

SOC 1 & 2
data integrity and security compliance

Get in Touch

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