

October 26th, 2022 Announcements

Ventures+

- We have updated our Size Standards search feature and our SBA Size Standards excel download to bring in the latest version (effective 10/1/2022) in the Loan Analysis > Size Standards menu.

- In order to help our 7A Lenders accurately complete SBA Form 1919, Ventures has added an additional page IF there are Affiliates associated with a project. **In order for the new Affiliates page to generate with the 1919 and be pre-populated with Affiliate name(s), Individual Name(s), Title(s) (Job Title), and Ownership Percentage(s), one of the following would need to be marked YES in the record:**
 - Question 6 in Entities → SBA 1919 tab is **YES**
 - Question 1 in Entities → Company Contact SBA 1919 is **YES**
 - Question 6 in Entities → Entity Owner 1919 is **YES**
- We are continuing to add more ETRAN fields to support the new Authorization and make life easier for our 504 Lenders. **Newly added fields can be found in real estate collateral records when the collateral type is mapped to SBA Collateral Type Lease.**
 - "Lease Beyond Loan Term" and "Notice to Terminate Lease in" fields are located in the Real Estate tab and will map to their respective input fields in ETRAN.

- In ETRAN, Name of Lessor input field will be pre-populated with the Title Vesting of collateral record in Ventures. Name of the Lessee input field will be pre-populated with the Primary Operating Company name.

2022101204 • Steven's Takuan Pickle Factory
Type 504 • Status Prospect
Loan > Collateral > 1245 River Park Drive, Sacramento 95815

Collateral Type * Commercial Real Estate - Lease ☒ Project Property
Indicates this is the subject property for the loan. There can be only one per loan.

General Real Estate Environmental Valuation 3rd Party Liens Liquidation Lien Recording

Type of Building - Not Set - Collateral Property Type - Not Set -
Parcel # Year Built
Lot Size Unit Size
Building Size Occupied By OC
Description
Describe real estate, if special use property, please describe here.
Historic Property
Historic Property? - No Property Defined -
Describe why property is or is not listed in the registry.

Tenants
Add
Tenant Name Rent Tenant Lease Date Lease Term Maturity Date Rent Amount Square Footage
No records found.

Loan
Lease Beyond Loan Term
Notice to Terminate Lease

Tools
Stay Connected
Help

Notes / Tasks
Partner Contacts
Entities
Financing
Eligibility
Deposits & Expenses
Collateral
Key Man Insurance
Valuation Summary
Loan Analysis
Verification
SBA Submission
Closing Requirements
Tracking
Review
Documents
Utilities
Associated Transactions
History

Collateral Type * Commercial Real Estate - Lease ☒ Project Property
Indicates this is the subject property for the loan. There can be only one per loan.

General Real Estate Environmental Valuation 3rd Party Liens Liquidation Lien Recording

Title Vesting
Lien Position - Not Set - Lien Amount
Default project property lien to \$698,000.00
Recording/Filing Date MM/DD/YYYY
Recording Data
Trustee Name
Security Instrument - Not Set -
Senior Lender Information
Recording Data January 1, 1900 as Instrument Number 123456 Trustee
Additional Information
Conditions for Release
Projected/Actual Release MM/DD/YYYY

Apply+

Exciting news for Apply+ lenders! Several new mapping fields have been added to the system so that you can push more data from the application to Ventures fields! Please review KB article [Apply+ Updating mapping Identifiers](#) in an application for instructions on how to update your current mapping fields. There is a video recording of the process in the KB article that would also be helpful to review. Newly added identifiers listed below.

Company Related

- NAICS (If user types in existing valid naics code)
Entities > POC record
Identifier: CompanyNAICS
- Business Involved in Pending Lawsuit (Yes/No response format)
Entities > POC record > Credit & Identification Tab
Identifier: CompanyPendingLawsuit
- Business Involved in Bankruptcy/Insolvency (Yes/No response format)
Entities > POC record > Credit & Identification Tab
Identifier: CompanyBankruptcy
- Business Entity Description Narrative
Entities > POC record > Narratives Tab
Identifier: CompanyEntityDescriptionNarrative
- Business Management Narrative
Entities > POC record > Narratives Tab
Identifier: CompanyBusinessManagementNarrative
- County of project property address (If user types in valid county)
General menu > General Tab > Project Property Address
Identifier: ProjectCounty
- County of business address (If user types in valid county)
POC vcard record > Address
Identifier: BusinessCounty

Contact Related

- Rank at Discharge
Contact > Background > Military section
Identifier: ContactRankDischarge
- Contact Middle Name
Contact vcard > Middle field
Identifier: ContactMiddleName
- County of owner address (If user types in valid county)
Contact > Background > Current Home Address section
Identifier: ContactCounty

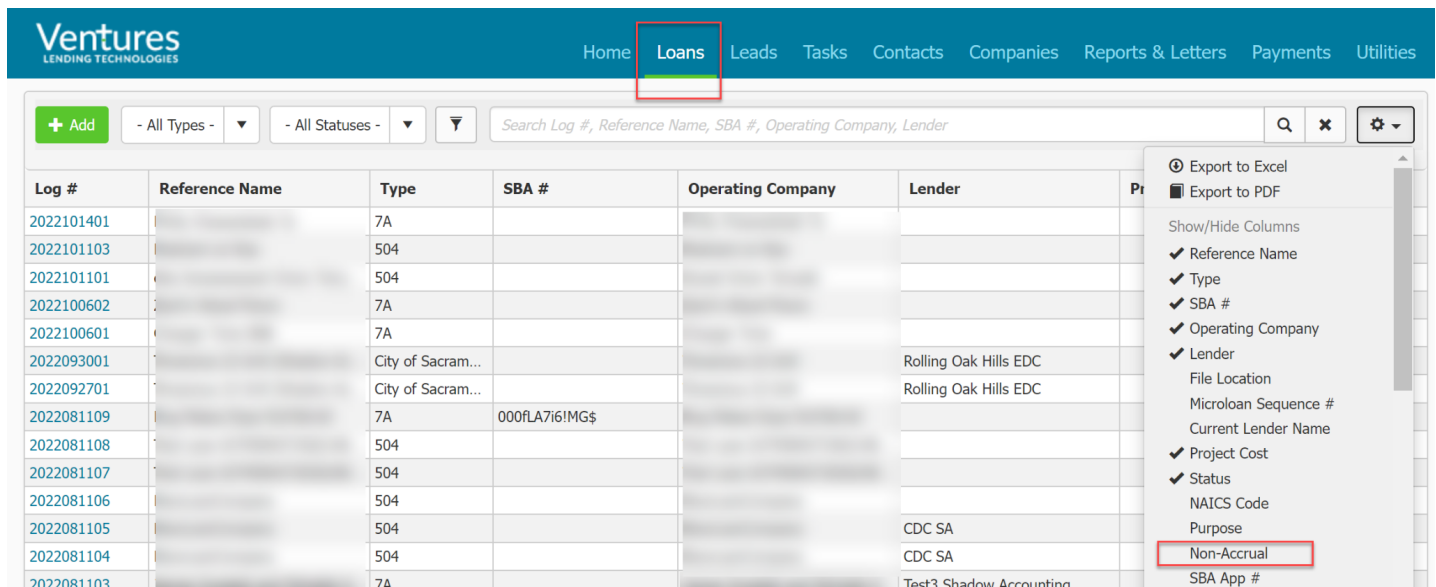
Loan Related

- Located in LMI community (Yes/No response format)
7A: Eligibility > General > Policy Tab > Located in a Low-to-Moderate Income (LMI) Community
504/Commercial: Eligibility > General > Public Policy Tab > Low to Moderate Income Debenture (LMI)
Identifier: ProjectLMICommunity
- Located in HubZone (Yes/No response format)
7A: Eligibility > General > Policy Tab > Located in a HUBZone
504/Commercial: Eligibility > General > Public Policy Tab > Located in a HUBZone
Identifier: ProjectHubZone
- Located in Opportunity Zone (Yes/No response format)
7A: Eligibility > General > Policy Tab > Located in an Opportunity Zone
504/Commercial: Eligibility > General > Public Policy Tab > Opportunity Zone
Identifier: ProjectOpportunityZone
- Located in a Promise Zone* (Yes/No response format)
7A: Eligibility > General > Policy Tab > Located in a Promise Zone
Identifier: ProjectPromiseZone
- Located in Empowerment Zone or Enterprise Community* (Yes/No response format)
7A: Eligibility > General > Policy Tab > Located in Empowerment Zone or Enterprise Community
Identifier: ProjectEmpowermentZone
- Is more than 50 percent of the workforce considered low-income or resides in a LMI census tract?* (Yes/No response format)
7A: Eligibility > General > Policy Tab > More than 50 percent of the business's workforce is low-income or resides in a LMI census tract
Identifier: ProjectWorkforceLMI

*Only available in 7A loan category

Payments+

Payments+ lenders can now add Non-Accrual as a data point on the Loans menu gridview.



The screenshot shows the Ventures Lending Technologies interface. The top navigation bar includes 'Home', 'Loans', 'Leads', 'Tasks', 'Contacts', 'Companies', 'Reports & Letters', 'Payments', and 'Utilities'. The 'Loans' menu item is highlighted with a red box. Below the navigation bar, there is a search bar and a filter section. The main gridview displays a list of loans with columns: Log #, Reference Name, Type, SBA #, Operating Company, Lender, and Pr. A dropdown menu is open on the right side of the gridview, showing options to 'Export to Excel', 'Export to PDF', and 'Show/Hide Columns'. The 'Show/Hide Columns' menu is expanded, showing a list of columns with checkboxes. The 'Non-Accrual' column is highlighted with a red box.

Log #	Reference Name	Type	SBA #	Operating Company	Lender	Pr
2022101401		7A				
2022101103		504				
2022101101		504				
2022100602		7A				
2022100601		7A				
2022093001		City of Sacram...			Rolling Oak Hills EDC	
2022092701		City of Sacram...			Rolling Oak Hills EDC	
2022081109		7A	000FLA7i6!MG\$			
2022081108		504				
2022081107		504				
2022081106		504				
2022081105		504			CDC SA	
2022081104		504			CDC SA	
2022081103		7A			Test3 Shadow Accounting	

A message from the Ventures Support team:

Thank you to those that have already adjusted and continue to use the [Contact Support](#) Widget located on the upper right portion of Ventures! For faster response time please continue to use the [Contact Support](#) Widget to submit any Ventures inquiries, this will ensure that your inquiries are not blocked by SPAM, that they land in the appropriate queue, and that all Ventures Support Staff has access to these inquiries and can provide a response accordingly.

Have new staff, need a Ventures refresher? Access the [Foundational Webinar Series](#) recorded sessions.

The [Contact Support](#) widget also allows you to input keywords into the Subject Line and provides a list of helpful KB Articles that you may access and/or may answer your queries.

Contact Support

Log in to Ventures+

Enter your username and password.

Create a New Ticket

Ticket Details

Subject*

loan analysis

Use keywords within the Subject line to view helpful KB

Someone may have asked your question already. See if you can find an answer below.

Foundational Webinar: Ventures Loan Analysis Menu Overview

Adding Personal Resource section to Credit Memo

Release Notes - 2021-10-07

Select from the options listed in the drop down