DLS FEATURES LIST

- Unlimited number of locations
  - Three mailing addresses per account
  - Two plus email addresses per location
  - Location Credit Limit
  - Unlimited number of locations DLS Online users (w/ DLS Online Module)
  - Attach documents to location record (w/ DOCs Module)
- Unlimited number of Accounts
  - Deposits/CDs
    - Fixed Term CDs/Standard Savings
    - Interest disbursements with check, EFT, and reinvestment
    - Restricted amounts from withdrawal
    - Variable rates based on period balance or average daily balance
    - Print deposit/CD contracts w/ account information
    - Schedule recurring transfer/withdraw transactions (w/ DOCs Module)
    - Attach documents to account records (w/ DOCs Module)
    - Attach documents to transaction records (w/ DOCs Module)
    - Use Spreadsheet to bulk enter deposit transactions
  - Loans
    - Simple Interest, Amortized, Simple-Amortized, Fixed Principal
    - Credit or Draw limits
    - Option to capitalization of interest each period
    - Option to base rates on Prime rate
    - Option to allow payments to start any time after start of loan
    - Option to reamortize schedule after extra principal payments
    - Print loan contracts w/ account information
    - Function to consolidate loans
    - Attach documents to account records (w/ DOCs Module)
    - Attach documents to transaction records (w/ DOCs Module)
    - Schedule recurring transfer/payment transactions (w/ DOCs Module)
  - Pooled Investments (w/ DLS+ Module)
    - Disburse profit/loss over individual accounts based on investment
    - Disburse fees over individual accounts based on investment
    - Attach documents to account records (w/ DOCs Module)
    - Attach documents to transaction records (w/ DOCs Module)
- Over 100 reports to select from and request special reports with support contract
  - Over 10 filters to customize reported information
  - Export over 35 reports to Excel
- Global/Individual interest rate changes
- Move Accounts between locations
- Merge Locations with other locations
- Global/Individual change GL numbers when changing accounting systems
- Unlimited number of Internet Users
  - Select locations that each user can access with one login
  - Select permissions for each user on each location

- Unlimited Investment Pools for parishes to invest in (w/ DLS+ Module)
- Send emails from within DLS
  - Announcements
  - Interest Disbursement Letters
  - Transaction Confirmation Letters
- Print Audit Letters
  - All accounts for locations
  - Individual accounts
  - Customize letter
- Unlimited DLS user list
  - Select areas user can access
  - Restrict user to read only permissions
  - Restrict user from deleting any records
- Create unlimited Location Types for report filtering
- Create unlimited Account Categories and Classifications for report filtering
- Create unlimited 3rd Party list to send payments to
- Create unlimited standard comments list
- Create unlimited standard lookup numbers list
- Create unlimited restrictions list
- Create custom letters from us using Word mail merge
- Export ending balances
- Create deposit variable rate table
- Create statement footers
- Create billings/invoices
- DLS Online Module
  - Data securely uploaded and stored on DLS Online server
    - Upload after data change
    - Upload on command by selected diocese user
  - Unlimited users
    - Each user can be restricted to online activities
    - Each user can be allowed to see more than one location
    - Create login messages for users to see when logging in
    - Block users when inactive for period of time
    - Allow transaction requests
      - Withdraw
      - Transfer
      - Loan Draw
      - Custom forms designed by you; created by us
  - Online user lost password functionality
  - Users can print statement/transaction reports
    - Diocese select statement they can print
      - Currently one statement style
      - New statements created upon request
    - Transaction can be exported by users to Excel
  - Users can view withdraw all/pay all amounts for future dates
  - Users can change their profile information
- Request more features, functions, and data point for little to no cost