Ability Portals For Business Finance Brokers



5 things you should expect fom a CRM

- Manage clients & cases with ease
- Automated contracts & applications

- workflow
- business

Transparency | Trust | Communication

 Organise your sales funnel Streamline your day-to-day

• Track the growth of your





What does a CRM do for me?

The problem

- Slow updates via email
- Unorganised information
- Missing information
- Manually make case documents
- Saving files to your PC/drive

The product

- Client portals
- Case management
- Fact finding
- Application tracking
- Document library

Transparency | Trust | Communication

The solution

- Trust & transparency
- Streamlined workflow
- Accurate data capture
- Quicker submission to banks
- Save files with cases

What does a CRM do for my clients?

- Upload their documents
- Track their cases
- Add new cases
- Get email & SMS updates



Transparency | Trust | Communication

Ner: (1) In Progress; (0) Construction Notation Details * Drop order here Propo order here + New Order Copyright © 2023	Orders		
Code:3 Drop order here Drop order here Name: Brad Starkey, B1 Network Systems Ltd Product: Details +> + New Order + New Order	New: (1)	In Progress: (0)	Done: (0)
Details → + New Order Drop order here + New Order	Code:5 Name: Brad Starkey, B1 Network Systems Ltd	Drop order here	Drop order here
+ New Order		+ New Order	+ New Order
	Drop order here		
Copyright © 2023	+ New Order		
		Copyright © 2023	
MacBook Pro		AacBook Pro	





Clofity

Book demo

