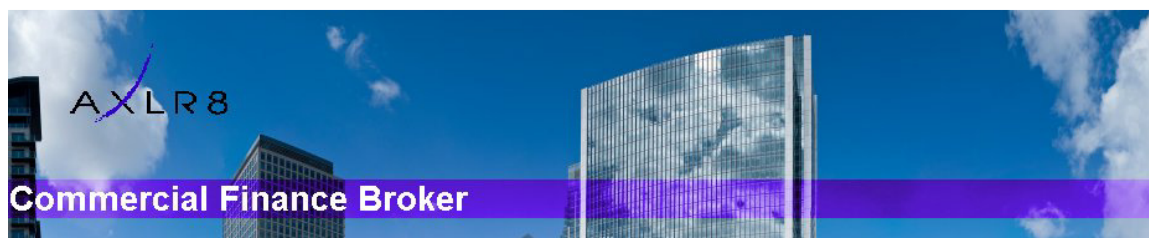


Commercial Asset Finance Broker

The Commercial Asset Finance Broker system is built on AXLR8's CRM and business workflow tools as a specialist solution for mid-sized Finance Brokers arranging finance for capital sums which can unlock business growth potential for their clients.

- ✓ Generate new business
 - Sales automation
 - Marketing tools
- ✓ Keep existing clients coming back
- ✓ Manage pipeline
- ✓ Back office and proposal/estimates calculations
- ✓ Calculate quotes using Freehand from Cassiopae.
- ✓ Manage proposals to funders
- ✓ Have easy access to all the information you need for compliance
- ✓ Management reporting
- ✓ Professional services
- ✓ Dedicated team
 - Implementation
 - Training
 - Support
 - Back up
 - New enhancements
- ✓ Cloud based so no need for extra hardware and runs on mobile device browsers as well as PCs and MACs.





Workflow supported

- Contact details for Clients, prospects, Funders, Introducers, etc.
 - Names & office and e-address(es)
 - Profiles and preferences
 - Website(s)
 - Type
 - Client and industry type
 - Introducer
 - Supplier
 - Funder
- Client history and planned/diarised activity
 - Notes
 - Calls
 - Diary
 - Emails
 - Been taken through credit and other internal and external compliance checks
- Client files
 - Documentation
 - Agreements
 - Contracts history and signed agreements
 - Proposals and pipeline
- Proposals and Estimates/ Quotes.
 - Put in basic parameters
 - Link to Cassiopae's leading Freehand product.
 - Bring them back to the system in the audit trail and tracking
- Reports to show everything from pipeline and sales leagues to commissions and client action lists.
- Data for Gabriel reporting

System Requirements

You can use the AXLR8 system on any PC with a browser.
