Connective Asset Finance

About the CAF CRM

The CAF CRM has been designed with the CAF broker journey in mind, and replaces your existing Mercury Nexus CRM.

The data in your old CRM is exactly the same the data as in your CAF CRM, it is just organised in a way that is more aligned to the CAF Broker.

Because the data across both CRM's are exactly the same you do not need to copy anything across. Simply open the CAF CRM and you are ready to go.

The CAF CRM Journey

Apart from look and feel, the main difference between the old CRM and the new CAF CRM is to the journey.

At the highest level there are three main steps in the journey:

1. Lead Capture
2. Quote
3. Application

Note: you will notice that the 'Summary' and 'Application' tabs are not available until the 'Proceed to Application' button has been selected. Whilst most deals will follow this 3 step process, sometimes you may want to jump straight into the application without going through the Lead Capture or Quote steps.

In this case, simply ensure you have the minimum fields entered on the Lead Capture tab (see Lead Capture step below) and click the 'Proceed to Application' button.

Step 1: Lead Capture

Each opportunity begins in a 'Lead Capture' stage and only requires you to enter minimal details so that you can generate a quote for your client.

Note: minimal fields you must enter on your Lead Capture are; Opportunity Name and Contacts (contacts must have name, email and mobile).

Step 2: Quote

Once you have entered your lead details, you can navigate to the Quote tab and generate quotes for your client.

Step 3: Application

Once you are ready to progress your lead to an application, click on the 'Proceed to Application' button. This will push the lead and quote details you have captured in to the Application form.

Across the top of the Application tab are all of the sections that need to be completed.

Navigate through each section and complete the required fields:

> **Personal Details:** will populate from your linked contacts when you press the 'Proceed to Application' button. If required, update the applicant's personal details on this tab.
>
> *Note:* if you add or make changes to applicants within an application tab the changes will not be reflected on the corresponding contacts.
>
> **Employment and Income:** will populate from your linked contacts when you press the 'Proceed to Application' button. If required, update the applicant's employment and income on this tab.
>
> *Note:* if you add or make changes to your applicants employment and income within an application tab, the changes will not be reflected on the corresponding contacts.
>
> **Financial Details:** used to be a separate tab called Financials on your opportunity in the old CRM. Financial details are now a section in the Application tab of your opportunity. If you have previously entered financials data into your old CRM simply open the opportunity in the new CAF CRM and you will find your previously entered data under Financial Details.
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> *Note:* Financial details are captured differently in the new CAF CRM Application tab. Some Income and Living Expenses will be automatically bundled together in to their new categories so that they match with how the lender's want to receive them and so you don't need to do any work.

Asset details: entered in the Lead Capture or Quote tabs will populate in to this tab. If required, update the asset details on this tab.

Upload Documents: into the corresponding document cards. Only one document type should be uploaded per card.

Use the Doc Centre to collect documents and push them to the attachments tab when you approve them. When you are ready to include them in your application, simply assign them to a category and an applicant(s) and click on the attach to application button.

Summary Tab

When you click on the 'Proceed to Application' button the Summary tab is made available.

The Summary tab is a landing page for your opportunity so that you can quickly locate information about your client or their application at a glance - without having to navigate through the whole application form. As you are entering information on the application form they will automatically populate on the Summary tab.

Note: not all fields on the Summary tab are also part of the application. These fields have been left blank so that you can add this information when you are ready.

As you progress the application through it's various stages you can update the 'Application Stage' using the dropdown on the top-left of the tab. The Application Stages relate specifically to the stages the application progresses through, they are not linked with the 'Opportunity Statuses' that your Kanban statuses are created from.

What's next for the CAF CRM?

This is just the beginning of the CAF CRM. We have many more features we're working on and that we have planned; like expansion of the quote functionality and the Client Centre to name just a few.

If you would like a demonstration on how our CAF CRM works you can book a 1:1 meeting with your CAF BDM.