

Overview

Finance Suite, provides business solutions to Stock Brokers, Investment Advisors, Chartered Accountant firms, Practitioners, Wealth Management advisors, LIC/GIC Practitioners and Asset Management Companies, allowing them to leverage their business with Information Technology. Simple and easy deployable Web based software provides all the features to securely manage data and functionality to access the right information at the right time. Sapphire's solutions help in reducing capital and operational costs with higher performance utilization. Manage your IT infrastructure smartly and grow leveraging our solutions and improve your total cost of ownership.

Manage, Publish, Retrieve and Present. Information at the touch of fingertip !!!

Solutions For :

- ➔ Stock Brokers
- ➔ Investment Advisors
- ➔ Chartered Accountant Firms
- ➔ Practitioners
- ➔ Wealth Management Advisors
- ➔ LIC/GIC Practitioner
- ➔ Management Companies

Features :

- ➔ Maintaining Healthy Relationships with clients
- ➔ Define relationships with your contacts for efficient contact management
- ➔ Calendars, Dashboards, Event Reminders
- ➔ Maintain Corporate Customers track information
- ➔ Setup Payment Installments - Weekly, Monthly, Quarterly, Yearly for automatic reminders
- ➔ Regular Follow-up reminders to generate potential customers to loyal customers
- ➔ Seamless integrations between Clients, Portfolio, Mutual Funds, Stocks, Funds or any other Instrument
- ➔ Get more out of your established customers
- ➔ Identify & Concentrate on Best & Loyal Customers for recurring business
- ➔ Stay in touch with your Contacts on occasions by enabling Automatic Greetings feature
- ➔ Integrate with Tally for Accounting
- ➔ Send periodic information to your client about News Update, Global Market, Trends, Analysis, Investment Ideas
- ➔ Link with Facebook, Linkedin and generate more business through social portals
- ➔ Allow your clients to login to your website & read published articles, news and investment proposals
- ➔ LIC, GIC premium reminders automatically sent across to client for due premium
- ➔ Linking of LIC, GIC, MF, Policy documents with contact



Benefits :

Business Benefits

Implementation Benefits

Investment Benefits

Increase in Sales revenues	Rapid Deployments	Huge savings
Increase in Lead Conversion rates	Go Live in less than a week	Pay as you Use
Generates Intangible Repository	User Friendly	Zero Maintenance under SaaS
Improve Customer Satisfaction	Less Customizations	Complete Service Model
Improve Customer Retention	SMS/Email Notifications	Options Service Model
Visibility between team	Scale your implementations	No Setup Fees