

Client



BRIDGE INVEST

Challenges

- Obtain location coordinates based on contact addresses and display the corresponding contact details on maps.
- Automatically populating borrower details, which have been shared via an online portal, into the appropriate modules.
- Efficient distribution of editable templates to multiple contacts through email.
- Allowing or system to perform automatic calculations on applicable fields when data is modified in one field.
- Generating the reports automatically based on the data in different modules.
- All the loan which is stored in the system is to be tallied with the bank ledger.

Solution

- Using Google API to get the coordinates using an Address.
- An approval system has been integrated into the system to automatically populate data into the appropriate modules.
- Our system utilizes the Sandgrid libraries to seamlessly convert editable files into attachable files.
- We are going to integrate with the banking API's in our system so that client doesn't have to go to the bank to tally the amount.

Conclusion

Our primary objective is to provide clients with a seamless system that not only manages their CRM but also streamlines their entire business process. Leveraging our team's technical expertise in conjunction with the client's cooperation, we are converting their complicated business manual processes into a simplified system. This system will not only benefit our client but also allow the other actors to access and track their record history effortlessly.