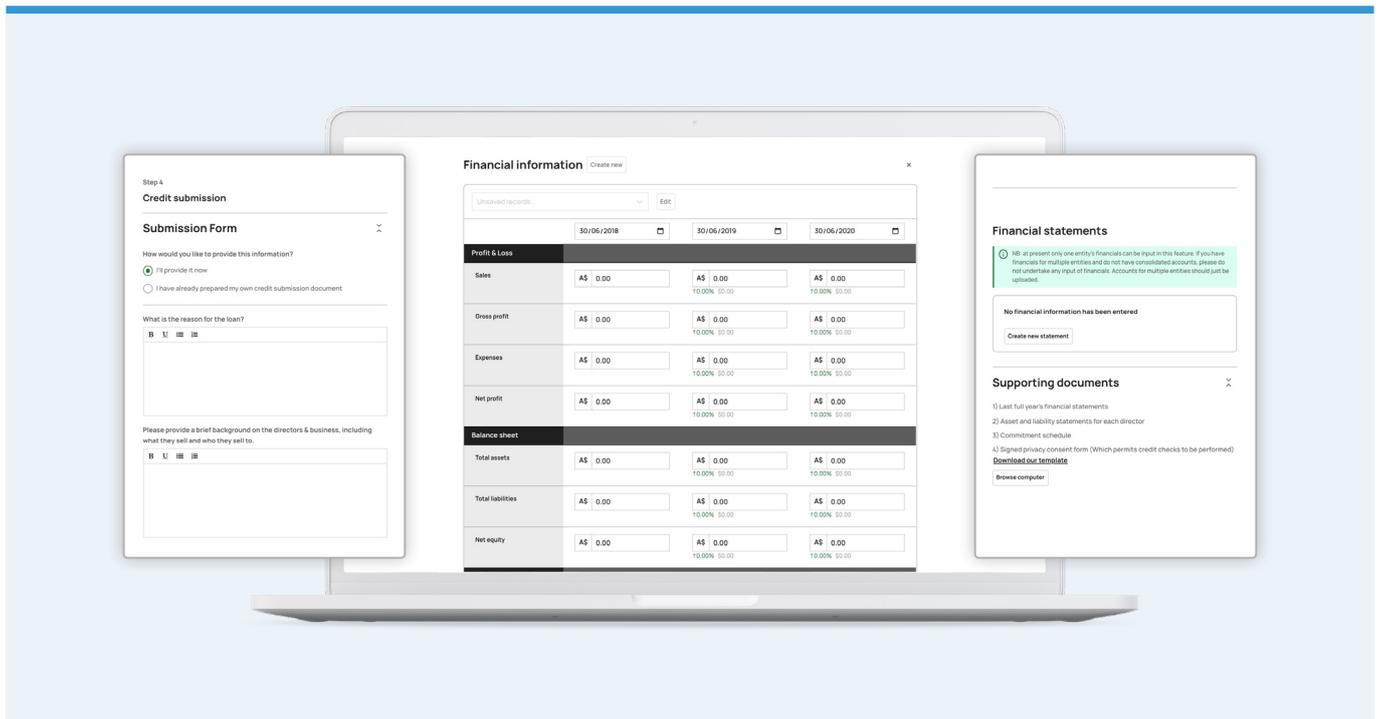


Trade Ledger Broker Portal

Boost broker-led commercial lending

You can now manage your introducer channel in the same way as your in-house sales channel, boosting efficiency and sales growth for multiple products.



The Trade Ledger Broker Portal enables you to harmonise your broker and in-house lending operations, on a scalable origination platform.

The Trade Ledger Broker Portal is a digital self-service channel that enables your brokers, introducers and aggregators to submit and manage new deals, across asset finance, leasing, invoice finance and term loans. It gives brokers quick and easy access to your systems so they can submit and track their applications. You can process more sales, faster and at greater profitability.

Instead of using manual or standalone processes that tend to be slow, inconvenient and subject to errors, brokers can log in and submit loan applications quickly and efficiently, via a self-service portal that integrates seamlessly with your origination system. Both you and your brokers get visibility of the progress of applications and loans, enabling everyone to check volumes, status and commission anytime they need to, and to identify and fix any delays or hold-ups. The time to cash is quicker, giving you a competitive edge. The greater transparency leads to growing trust between you and your brokers, which means they're more likely to choose you.

How the Broker Portal works

WORK MORE EFFECTIVELY WITH YOUR INTRODUCERS AND BROKERS

Access to the portal is via a browser. There are two views, one for you and another for brokers. Onboarding is quick and easy. New brokers sign up with you via the portal in just over a minute. You can view the information they submitted from your brokerages screen, and approve them in a few clicks.

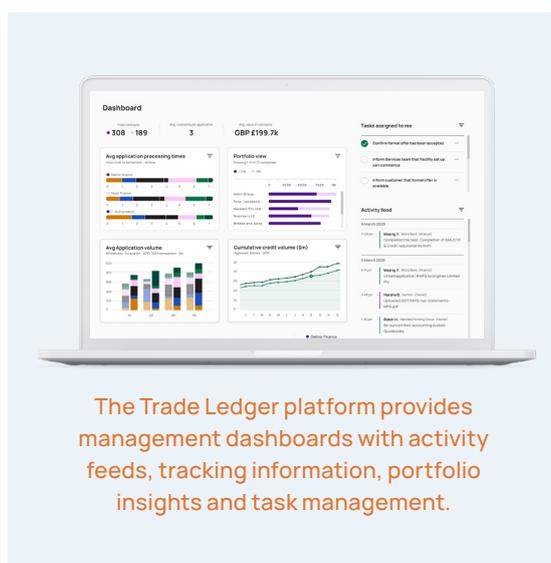
Your brokers can then submit borrower applications to your origination system for you to process, and you can both track progress any time you choose. Broker-led applications are clearly marked.

The portal has been designed with data at its core, with integrations into a range of third-party aggregation and verification tools, unlocking the ability for your introducers and sales teams to identify the most qualified funding opportunities for working capital.

END-TO-END CREDIT MANAGEMENT

The Broker Portal is based on the Trade Ledger end-to-end credit management platform.

When a broker submits an application via the Broker Portal, the platform assembles all the data that's needed: from your core systems, the borrower's accounting package, third-party credit bureaux and documents. You can apply a risk policy to score applications and process them to agreement stage rapidly.



You and your brokers get the appropriate instant insight into individual deals, and benefit from a single way of working, with a single customer view – everyone works from the same data.

The Broker Portal is just one part of a comprehensive platform for managing commercial credit – the Trade Ledger platform. It also provides management dashboards with activity feeds, tracking information, portfolio insights and task management. It improves continuously with new features and capabilities.

For more information on the platform, [contact us](#) or ask us for our Solutions Brochure.

BENEFITS

The visibility provided by the Broker Portal improves relationships and collaboration between you and your brokers. When brokers can see their applications progressing, and don't need to contact their relationship manager every time they want updates, it can help them reach their targets more easily and encourage them to place more business with you.

FEATURES

- Simply designed screens for you to manage brokers and their leads
- Pre-configured application journeys for invoice finance and asset finance products
- Accounting package connectors
- CSV data import wizard
- Comprehensive document management system
- Creation of loan documentation
- Origination workflow and task management
- Document repository to capture securities and guarantees on assets
- Credit bureau integration and pre-population
- Integrated CRM capability, whether you use the Trade Ledger platform for CRM, or integrate it with a third-party CRM

With the self-service Broker Portal you get:

- An advanced tool that helps introducers and sales teams work productively together
- A branded user experience that's quick and easy to use
- A fast application journey, requiring little effort and offering instant quotations
- A single way of working across your channels
- Real-time progress tracking of applications and leads
- Transparent information on commissions
- Single customer view, reducing duplication and copy/paste and re-keying errors
- Low error rates, which means a better experience for customers with reduced frustration
- Rapid customer onboarding
- Comprehensive audit and activity feed

The Trade Ledger Broker Portal provides digitised, efficient processes for you and your brokers. Everything you need to manage your loan book is in one place. It makes business lending faster, easier and more profitable.



Enabling credit for every business

ABOUT

Trade Ledger exists to enable lenders to provide credit to SMEs, by putting the customer experience at the heart of the process, and expanding the types of loan collateral without increasing risk. The laborious task of gathering information and data is automated as much as possible to reduce effort and save time. Since this data is all held in one place, everyone can work from a single version of the truth. The richness of the data – sourced from you, your customers and third parties – gives you a much broader view of risk, enabling you to expand beyond traditional credit to complex lending products such as all types of invoice and asset finance.

DISCOVER MORE

To find out more about the Broker Portal, or for a demo, contact us at www.tradedledger.io/contact

SYDNEY

47, MLC Centre, 19-27 Martin Pl,
Sydney NSW 2000

LONDON

Cairo Studios, 4 Nile St,
Hoxton, London N1 7RF

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