



A COMPETITIVE ADVANTAGE
FOR MCA COMPANIES

Merchants need money fast, and data shows they will usually take one of the first three offers they receive. The faster you can connect with them, get an application, return an offer, the more likely you are to get their business. However, if your system is causing roadblocks or slowdowns, you will get left behind.

Cloudsquare Broker is the most customizable and reliable Lending CRM on the market, built on the proven CRM framework of Salesforce and easily connecting to the extensive marketplace of 3rd party Salesforce Apps to ensure you have all the tools you need.

Broker helps you get ahead of the competition by providing a single platform to track your pipeline, close more deals, and grow your business.

Built By Veterans of the Lending Space

Robust

Created specifically to meet the needs of MCA brokers and ISO's, Cloudsquare Broker manages the entire MCA process, from new leads to deal renewal and everything in between.

Intelligent

Built on Salesforce, Cloudsquare Broker gives companies the leading edge in technology. Automated workflows, smart-filtering submission channels, Lender API integrations, and automated renewal forecasting are just some of the features that make the MCA process more intelligent.

Scalable

Seamlessly integrate 3rd party apps, connect to your marketing platform, and customize just about any feature in the CRM with a handful of clicks.

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“Everything we needed and more. Not often do products deliver on all the promises they make. In this case, we got more than expected. This out of the box solution has all the bells and whistles built in and allowed us to hit the ground running, instead of taking the time to build things out ourselves... Great product well worth the money.”

John Celifarco, Horizon Funding Group

Keep Everything You Need in One Platform

3rd Party App Integrations

- ✓ Ready to go, out of the box. No time-consuming or costly customization required. Get started with Salesforce quickly and easily

Turn-key Merchant Cash Advance CRM

- ✓ Tap into the marketplace of over 150,000 Salesforce Apps, and get the specialized functionality you need, including e-signature, voice and mobile integration, marketing automation, and much more.

Custom Settings Page

- ✓ Customize the CRM to your exact needs without paying a consultant for hundreds of hours of custom work.

Automated Applications & Workflows

- ✓ Automate your routine redundant tasks and save your team time with Salesforce.

Leads and Pipeline Management

- ✓ Custom deal stages tailored to the specific needs of the MCA pipeline.

Submission Channel

- ✓ Submit application packages to multiple lenders simultaneously.

Commissions Module & Renewals

- ✓ Automated renewal forecasting helps you plan and build a renewal pipeline.

GET STARTED ON
SALESFORCE WITHOUT
THE TIME OR EXPENSE
OF A CUSTOM SYSTEM

- Cloudsquare Broker offers Brokers more out-of-the-box customization options than any other lending CRM. Custom settings allow you to thoroughly configure the system to meet your unique business needs, all with just a handful of clicks.
- Unlike other business loan CRM options on the market, which are only software frameworks and often require hundreds of hours of custom work, Cloudsquare Broker is a turn-key solution that allows Brokers to be up and running in a matter of weeks.
- Over a decade of experience and feedback from hundreds of industry veterans has gone into Cloudsquare Broker's intuitive interface, making it easy for everyone, from new hires to experienced brokers, to use the system, even with little training.

Contact Us!

Cloudsquare.io | (833) 344 - 8850 | hello@cloudsquare.io