

Take Back Control!



Your origination process changes often - new channels, new vendors, process updates, regulatory changes can all spark the need for updates to your workflow. You need the ability to make those updates without waiting in line for your vendor to finally call your number!

Cirrius Solutions has developed a configurable foundation for the equipment finance origination process built on the Salesforce platform.

This platform allows lessors to:

- Leverage basic workflows and components as a starting point while also implementing their unique business processes
- Avoid having to pay for the removal of legacy code and other people's processes
- Maintain the code and components themselves using any Salesforce resource

Cirrius has built a simple and flexible workflow covering the main process steps in origination including Customer Management, Quoting, Credit, Deal Award, Documentation and Booking. Lessors can use any or all of these steps as a starting point, and work directly with Cirrius on the configuration of specific business rules and process flows. Cirrius utilizes a templated approach to gather and build the requirements specific to the lessor, and once built, the platform is delivered as an open solution that can be easily maintained by any Salesforce resource.

Cirrius Solutions is a Silver Salesforce partner and has executed over 300 successful Salesforce projects across a variety of industries and companies. They have many highly certified professionals on their national team and consistently obtain rave reviews from their customers on AppExchange, the industry-standard Salesforce partner site.

WORKFLOW-ENABLED

Use of workflow allows for full visibility and division of roles, multi-tiered approvals, and SLA tracking.

STANDARD INTEGRATIONS

Standard integrations with third-party providers are included and open APIs enable addition of custom integrations as needed.

FULLY UNLOCKED

Fully configurable and unlocked platform allows for flexible updating as processes change. Cirrius can continue to support your business or you can utilize any other Salesforce resource.