



SALESTREKKER 2.0

KEY NEW FEATURES

Septmber 2024



FEATURES CARRYING OVER TO 2.0

- Deal board for easy visual pipeline management
- Easy and logical application flow and user interface
- Inbuilt eSignatures
- Multiple in-built industry vital integrations
- Integrations with NextGen, Simpology and lenders direct
- Diversification integrations
- Video conferencing
- Lender library
- Inbuilt webform for lead capture
- Access Referrals for deal referral
- Partner Portal data and file sharing
- Extensive knowledge base and dynamic, capable help desk
- Mobile apps

STANDARD BROKER FEATURES

- Accurate servicing calculators for over 120 lenders
- Fully integrated and accurate Quick Tools with policy insights
- Lender policy search engine
- Deal scenarios
- Document preview in the application screens
- Quick actions in the application screens
- Compliance note templates
- Customisable Client Portal for data and file sharing
- Custom video links in Client Portal
- Advanced search and filtering functionality
- Forecast deal view screen
- In-app notifications
- New, modern document templates

ADVANCED BROKER FEATURES

- Custom workflows, deal types, deal statuses
- Deal and contact custom fields
- Custom document engine
- Advanced conditional automation
- Improved task functionality
- Deal checklist and task templates
- Advanced label and required document templates
- Multiple pre-built integrations
- Enriched security property data
- Commission groups and contracts assigned to a broker
- Website calculators and comparison tools
- Multiple pre-built marketing integrations
- Improved email integration

HEADGROUP FEATURES

- Detailed roles and permissions for improved data security
- Mandated multi-factor authentication and password enforcement
- SOC2 Type2 and ISO27001 accreditations
- Supports enterprise structures with setup propagation to child orgs
- Enterprise user management
- White labelling ability with branding and document settings
- Supportive of both large teams and individual brokerages
- Extensive reporting integration with PowerBI
- Home loans, commercial finance & asset finance in one platform
- Servicing buffer settings
- NCCP reporting capability
- Commission platform integration
- Open API, most advanced in the industry
- Enterprise monthly billing

THANK YOU

W: salestrekker.com

E: dalibor@salestrekker.com

T: 0419 250 301

A: Suite 2101A, 520 Oxford St, Bondi Junction



DALIBOR IVKOVIC

CEO & CO-FOUNDER

