



STOCKCLOUD STOCK MARKET MANAGEMENT

Intelligent business application based on Microsoft Dynamics 365 CRM, includes the latest in Microsoft Business Applications and Cloud technology: Microsoft Dynamics 365 Sales + Power Platform + Azure.

Helps foster investor relations, create brokerage accounts, manage orders, and streamline trading. It increases the productivity of brokers by consolidating operations on a single platform, and providing them with a 360 view of clients, which allows managing all investor information and negotiation processes in an agile, efficient and secure way.



INTEGRATION

Integration with LA Systems, as well as with the business website, also having the availability of a mobile application



MANAGEMENT

Manage the entire Business Process (3 phases: identification, due diligence and qualify) from a simple platform



CONTROL

Monitoring system, as well as a 360 view of investors, from which you can generate reports and notifications

MODERN AND ADAPTABLE PLATFORM STOCKLOUD

Beyond a CRM, it is a complete solution for the management of the stock market that allows you to have centralized information on the client.

MAIN BENEFITS

Create brokerage accounts from a single web form, as well as automatically assign investor or risk profiles in a very simple and intuitive way. The platform provides a price calculator for financial instruments, in addition to being able to manage the stock market portfolio or investment instruments adapted to the business need.



Customizable



Multi device



Cloud based

7 GREAT FEATURES

1. Effective management of brokers
2. Centralize the platforms-systems
3. Strengthen relationships with key investors
4. Efficient allocation of resources
5. Reduce processing time, which optimizes and strengthens the information analysis team
6. Automate the transactions of the entire stock market management process
7. Create templates and dashboards