



CoolLife.io  
Fintech CRM & VDR

# Builds The Engine that Drives Your Business Forward

Passionate about  
business, driven  
by your success  
—our edge is  
delivering results

## SECURE

CRM  
File Sharing  
Projects  
Database  
Billing

We solve customer challenges by unifying fragmented business processes, ensuring seamless integration and secure collaboration. Our platform streamlines sales, enhances customer engagement, and delivers real-time insights—all within a secure environment.



### **Fast – Intuitive – Secure**

Empowering your business with seamless integration, real-time insights, and top-tier security—all in one powerful platform

### **CRM - Smarter Customer Engagement**

360° Customer View

Centralize data for seamless communication.

Automate & Personalize –

Streamline workflows and outreach.

## Virtual Data Rooms(VDR)

- Secure & Efficient Document Sharing
- Encrypted file sharing for financial transactions.
- Access Control & Audit Trails – Set permissions and track every interaction
- Seamless CRM Integration – Store, manage, and share documents effortlessly

## Sales Performance Management (SPM)

- Optimize Sales Execution – Plan, forecast, and track KPIs
- Actionable Insights – Sales visibility of performance

## Real-Time Reporting & Analytics

- Custom Reports – Dynamic insights in real-time
- Live Dashboard – Track key metrics configured by users or groups

## Seamless Integrations

- Outlook, Gmail IMAP
- DocuSign
- SendGrid marketing
- Authorize.net

## Application Programming Interface (API) REST

- Enables secure and seamless external data integrations
- Enables efficient 2-way exchange of data
- Automation and connectivity across platforms, other applications, and services

## Enterprise-Level Cloud Solution

A powerful and scalable cloud platform designed to serve everyone—from single users to global enterprises. Our solution adapts to your business needs with flexible subscriptions, configurable features, and competitive pricing, ensuring seamless performance and growth.

All the pieces you need to run  
smoothly - **ONE** simple  
to use **SOLUTION** that  
works for **YOU**.

**800.988.8850**

**Sales@CoolLife.io**