

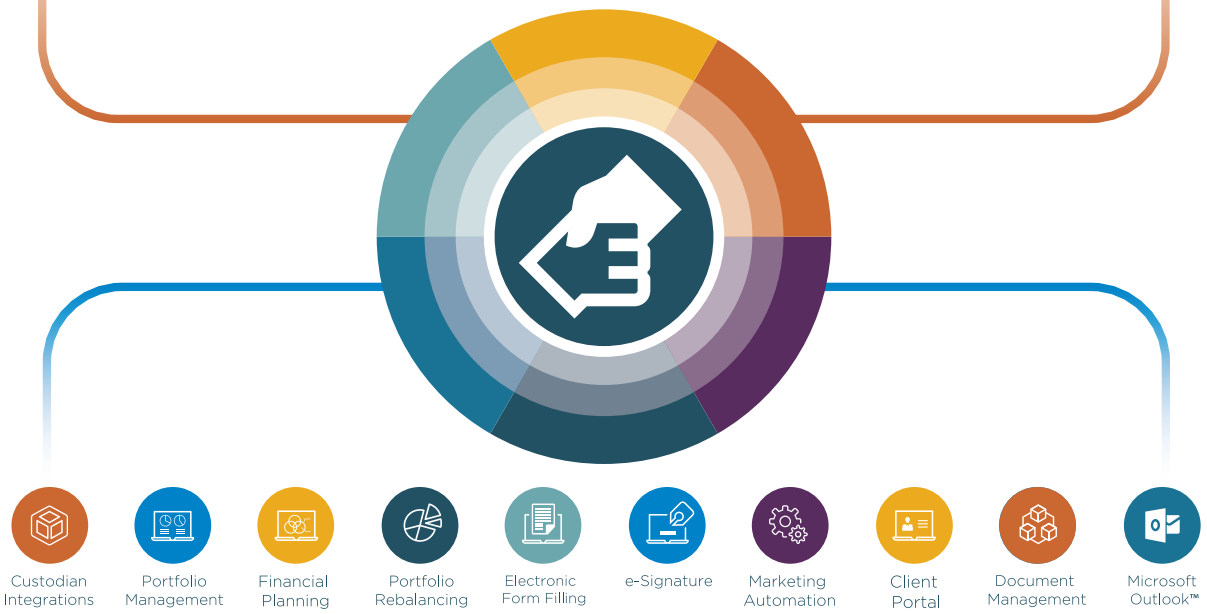


# Salentica® Engage™

On Microsoft Dynamics 365

Salentica Engage is a fully configurable Client Relationship Management (CRM) solution powered by Microsoft Dynamics 365. This cloud hosted, integrated solution is designed specifically for financial advisors to address their unique client management and business development needs.

## INTEGRATIONS



**Custodian Integrations:** The solution includes prebuilt custodian integrations enabling users to gain access to secure, real-time custodian account data in the CRM through Schwab OpenView Gateway®, TD Ameritrade Institutional's Veo® and Fidelity Wealthscape<sup>sm</sup>.

**Portfolio Management:** Integration to Black Diamond® Wealth Platform, Advent APX® & Axys®, as well as other SS&C solutions, Envestnet | Tamarac and Orion Advisor, to access account information including daily holdings, security master, asset allocation and AUM Aggregation at the Account, Relationship and Family level.

**Financial Planning:** Integration to MoneyGuidePro® provides users of the CRM with seamless one-click access to view Relationship and Plan information. Push CRM information, including Relationships, Contacts, Beneficiaries, Assets, Liabilities and more, directly into MoneyGuidePro on-demand.

**Portfolio Rebalancing:** Improve daily workflow efficiencies with access to leading rebalancing tools from within Salentica Engage. Choose from a variety of integrations including single-sign-on (SSO), integrated web views from a Salentica Engage 'Rebalancing Group' record or a Salentica Engage 'Investment Account' record, directly into the portfolio rebalancing tool.

**Client Portal:** Harness the power of the CRM alongside industry-proven client portal solution, Modestspark, for quick access to client reports, document portal and client onboarding support. Click through from the CRM Relationship level

directly to the Modestspark dashboard to access investment reports, client documents, statements and more.

#### **Electronic Form Filling and**

**e-Signature:** Salentica Engage integrates with Laser App® to provide our clients with accurate custodial form filling using CRM data to reduce NIGO errors and increase accuracy. Improve straight-through processing efficiency by combining e-form automation with electronic signature.

#### **Other integration solutions:**

Salentica Engage fully integrates with widely used document management systems and Microsoft Office applications, including Outlook®, to synchronize Contacts and easily track emails, appointments, and tasks. Word® templates and Excel® dynamic worksheets are included.

#### **Microsoft Power Platform:**

Salentica Engage enables advisors to take advantage of the full potential of Dynamics 365 and Office 365 through one connected app platform. Extend your user experience with Dynamics 365, Office 365 and the Microsoft Power Platform (PowerApps, Power BI and Microsoft Flow).

- Easily build interactive apps your firm needs with PowerApps.
- Take advantage of Power BI to connect datasets and gain important business insights from repositories throughout your firm and the IoT.
- Leverage Microsoft Flow to connect Engage to other Microsoft or third party solutions to further enhance workflow effectiveness.

#### **Your Client 360° and Workflow**

**Automation:** As the hub of your organization, Salentica Engage provides users with a 360° view of your client using a configurable hierarchy including Families, Relationships and their centers of influence and referral sources, Contacts, Accounts, Portfolios & Holdings and tools for managing operational processes called Request Management.

With workflow automation, firms can increase efficiencies and improve the client service they provide as users can automate client onboarding, account openings and annual reviews.

Investing in Salentica Engage provides your organization with anytime, anywhere access to a robust prebuilt wealth management solution that has all the ingredients your firm needs to be successful.

#### **Professional Services:**

Salentica is built on the foundation of empowering our clients. We ensure our clients are equipped with the tools and knowledge necessary to efficiently manage and grow their business. Salentica's industry leading technical support and training resources allows our clients to receive maximum benefit from their CRM solution.