

Salentica Data Broker™ Platform for Salesforce



registered ISV
partner

Overview

Salentica Data Broker facilitates rapid deployment of integrations to enable advisors to manage their business on the Salesforce platform and gain a 360° view of their client. Advisors using a Salesforce solution can quickly deploy Salentica's Cloud-based Data Broker by following some simple configuration instructions. This removes the need to adapt a provider's special CRM configuration or hire programmers to build custom integrations to providers' interfaces.

With Salentica Data Broker, only one package needs to be installed and maintained in a firm's CRM to be able to provide access to real-time custodian information as well as portfolio management and financial planning data that a firm relies on to service their clients. Updates to the integrations required by Salentica or the provider of the data are deployed to Salentica Data Broker, as a result, reducing the need for frequent updates to the client's CRM.

Flexible architecture built for the future

Salentica Data Exchange Service, which is part of the Salentica Data Broker Platform, provides the ability for a firm to map the data from a data source into their CRM. The Data Exchange Service eliminates the issues and conflicts created when fields are hard coded to the target CRM.

The Salentica Data Broker enhances firm password security by eliminating the need to provide and maintain login credentials for multiple 3rd parties that require access to their CRM. The Salentica Data Broker acts as a trusted platform between the client's CRM and the 3rd party data source with only one set of credentials being stored securely in the Salentica Data Broker. The Salentica Data Broker is reviewed by external data security firms to ensure it provides a trusted integration platform.

HOUSEHOLD/ENTITY Household Client			
Phone	Ranking	AUM	Home
(416) 255-8996	Platinum	\$180,989,500.00	245 Park Avenue, New York, NY 10167 US
Send with DocuSign			
DETAILS		RELATED	
Household/Entity Name	Ranking		
Clarke, Tim + Joanne	Platinum		
Relationship Type	AUM		
Household Client	\$180,989,500.00		
Family	Valuation Date		
Clarke Family	3/7/2017		
Company			
Main Contacts			
Primary Contact	Secondary Contact		
Tim Clarke	Bob Bailey		
Relationship Team			
Relationship Manager	RM Notify?		
Jonathan Lucas	<input checked="" type="checkbox"/>		
Investment Advisor	IM Notify?		
Bill Rourke	<input checked="" type="checkbox"/>		

Aggregate AUM for the Entire Relationship

