Salentica Data Broker[™] Platform for Microsoft Dynamics 365

Microsoft Partner

Overview

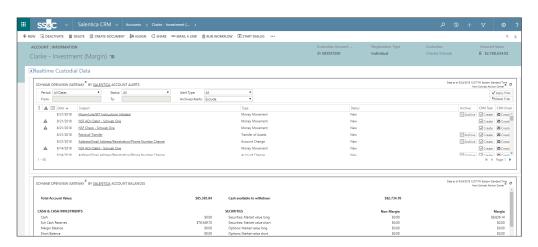
Salentica Data Broker facilitates rapid deployment of integrations to enable advisors to manage their business on the Microsoft CRM platform and gain a 360° view of their client. Microsoft Dynamics Online is the preferred deployment option. Additional deployment options for Salentica hosted or on-premise environments are available. Advisors using a Microsoft CRM 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 the 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.



Secure, Real-time Custodian Account Data through Schwab OpenView Gateway®



Salentica Data Broker Platform for:	Microsoft Dynamics 365
Schwab OpenView Gateway	✓
TD Ameritrade Institutional's Veo	✓
Fidelity Wealthscape	✓
Schwab Data Delivery	✓
Black Diamond Wealth Platform	✓
Advent APX & Axys	✓
MoneyGuidePro	✓
LaserApp	✓
Modestspark	✓
Salentica Data Secure, Trusted, Flexible Real-time Dat	
Salentica Data Connection Service TM Prebuilt data connections allowing for real-time, view-only visualizations of data from leading custodians.	Salentica Data Exchange Service TM Flexible, metadata-driven data movement from integration source to target. Adaptable to any CRM deployment with user-defined data maps.
	Persistent Custodial Integrations Financial Planning Integrations Form Filling Integrations

