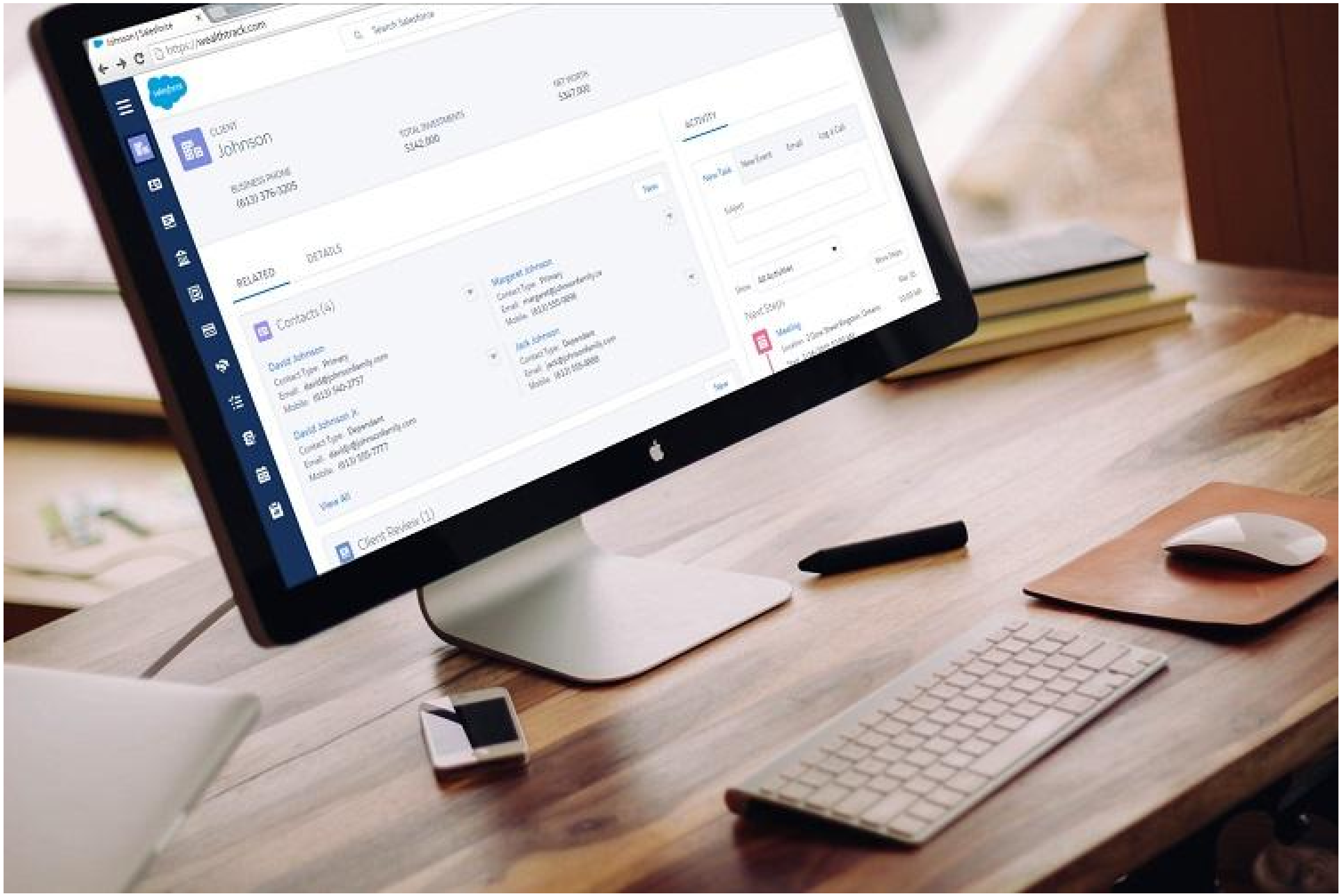
Introduction to

WealthTrack

CRM for Canadian Financial Advisors

TechActif
Cloud Applications

WealthTrack CRM on Lightning



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WealthTrack CRM on Salesforce1 Mobile

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Navigation – Tab Pages

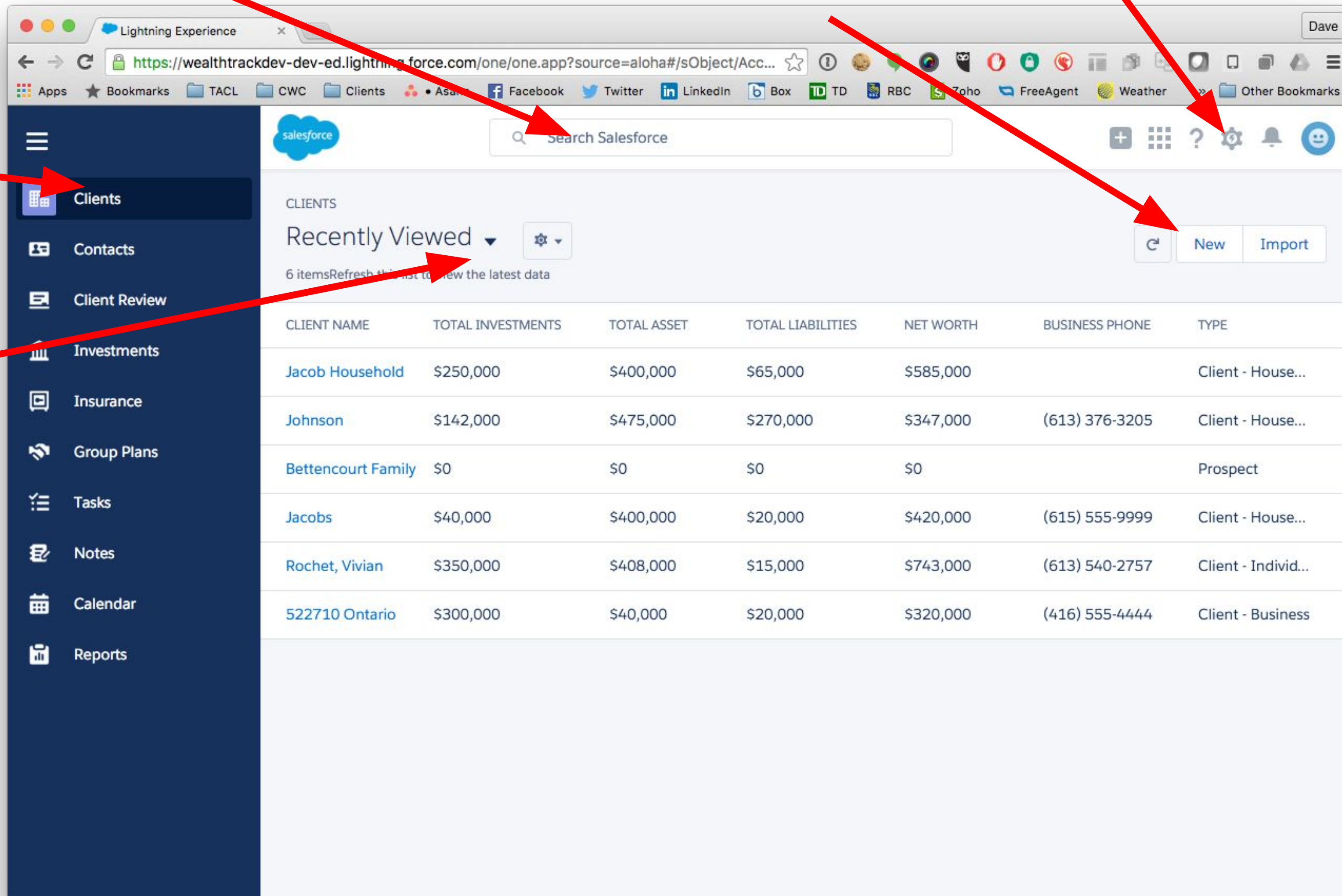
WealthTrack Search

Action Items

Setup Menu

Tabs

List Views



Navigation – Object Pages

WealthTrack Search

Action Items

Setup Menu

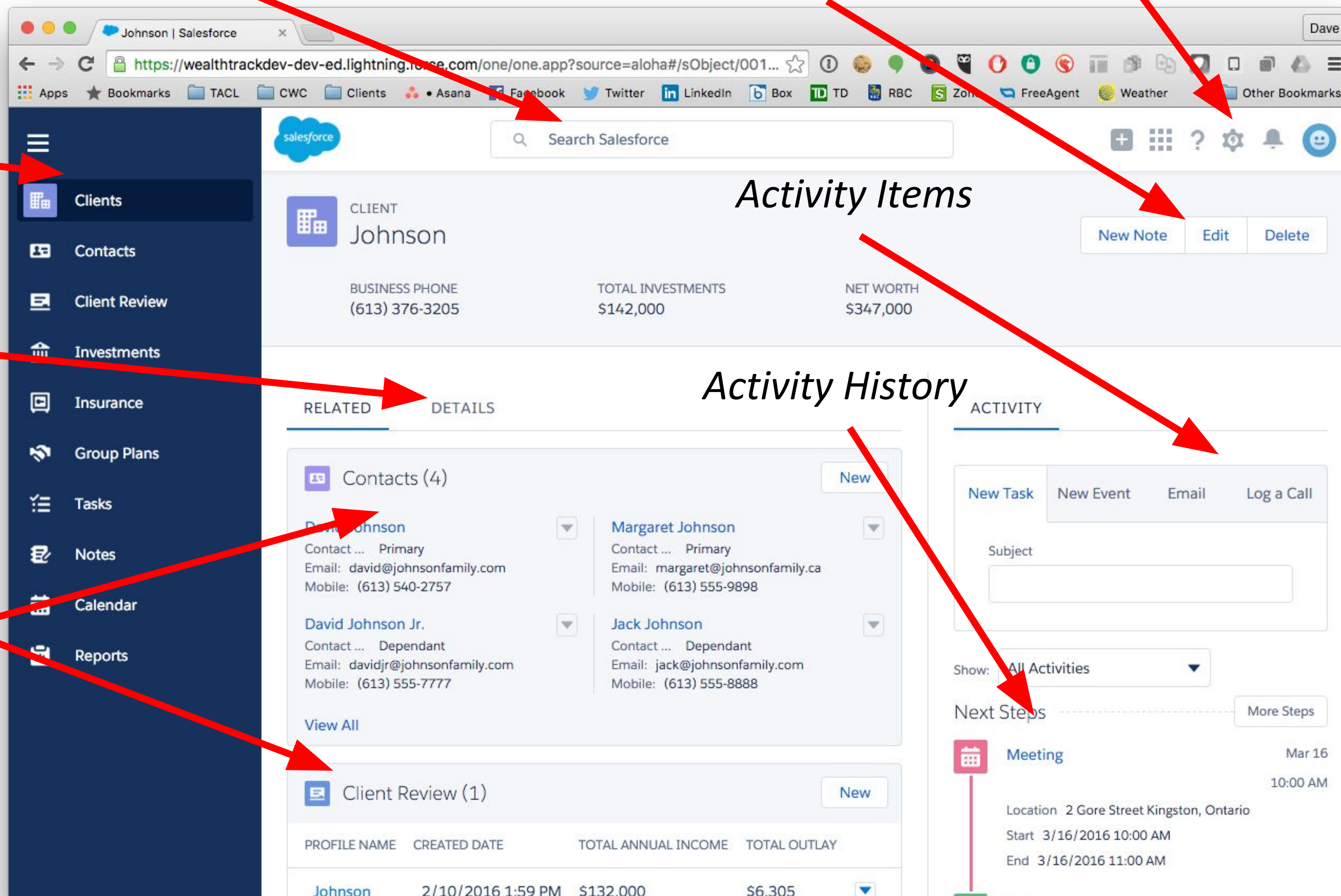
Tabs

Activity Items

Click to view Details about client

Activity History

These are all related items that can be opened for more detail



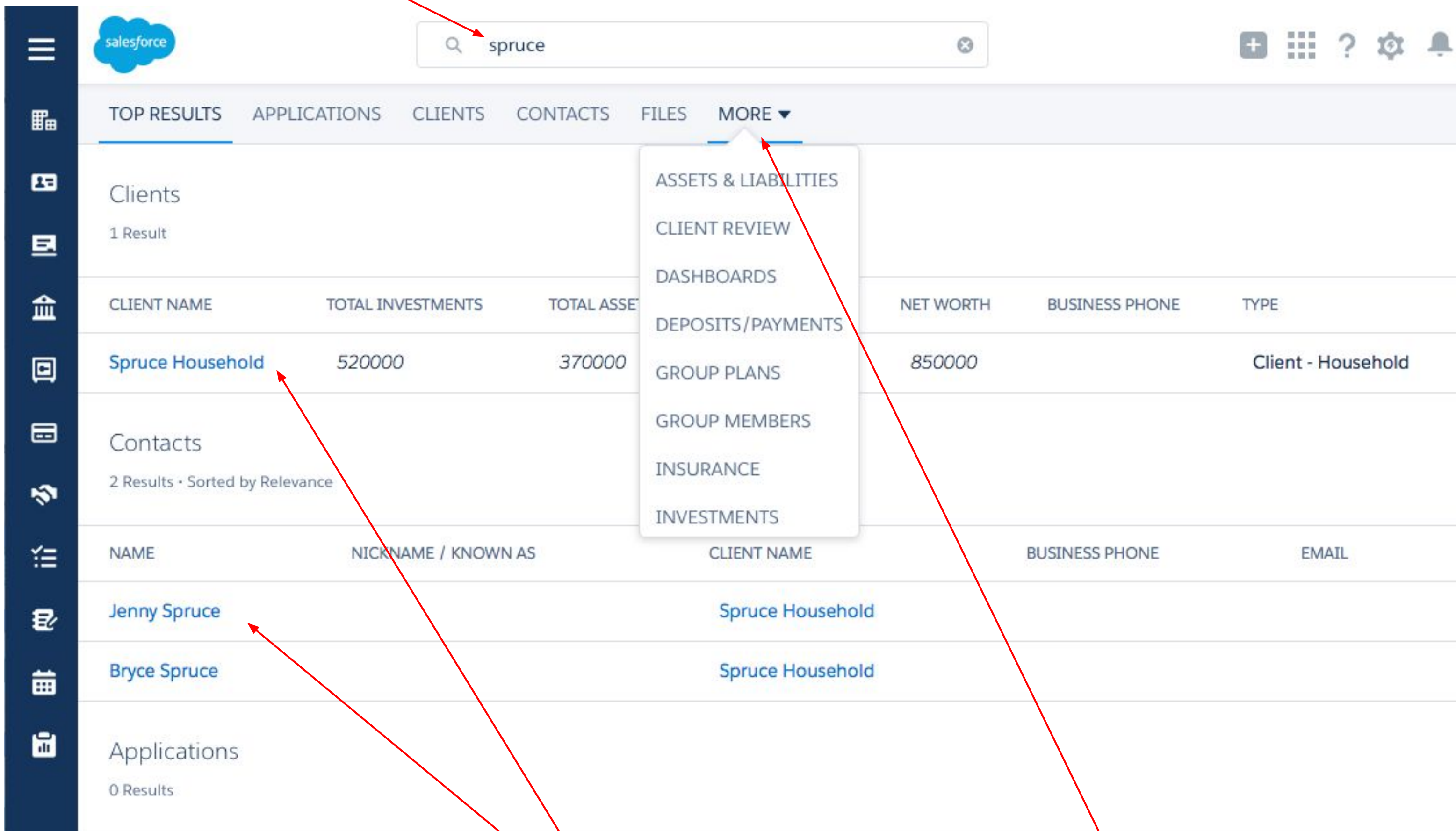
WealthTrack Terminology

Refer to these as Objects

Clients	The top level record for a household or business. Individuals copied here.
Contacts	Details on members of the household, business or individual
Client Review	A cross section of “Know Your Client” information to collect
Investments	Information about your client’s investments
Insurance	Information about individual insurance policies
Assets & Liabilities	Information about household assets (home, cars) & liabilities (credit cards)
Group Plans	Basic tracking of any group plans you may manage with clients
Tasks	You can create Tasks on any object page and they are tracked here
Notes	You can create Notes on any object page and they are tracked here
Calendar	Any event or dated task will show up here
Reports	Click here to see a list of reports available or create a new one.

WealthTrack Global Search

1 - type your search term here

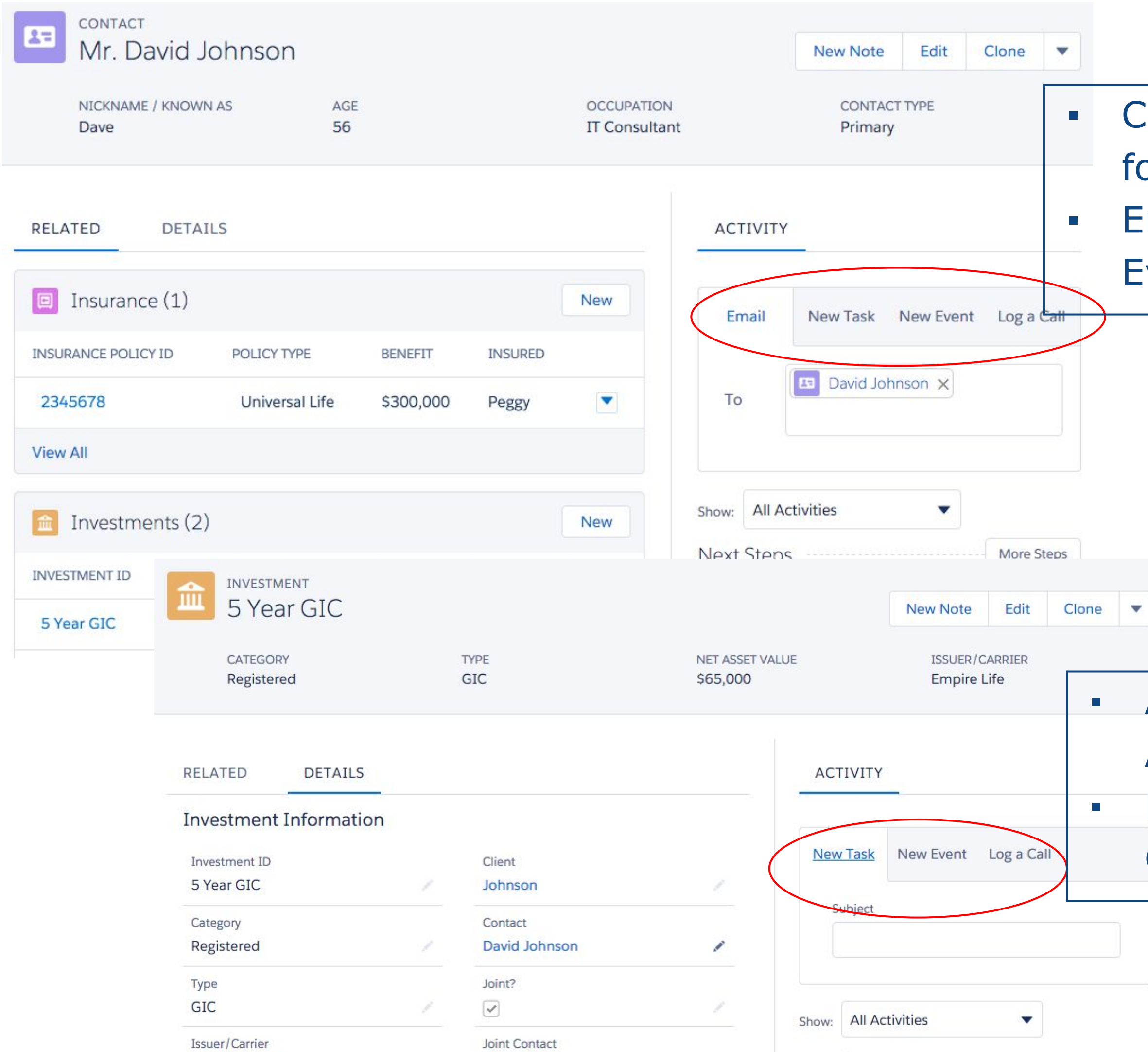


3 - Review additional results here

2 - Review standard results here

Accessing Activities

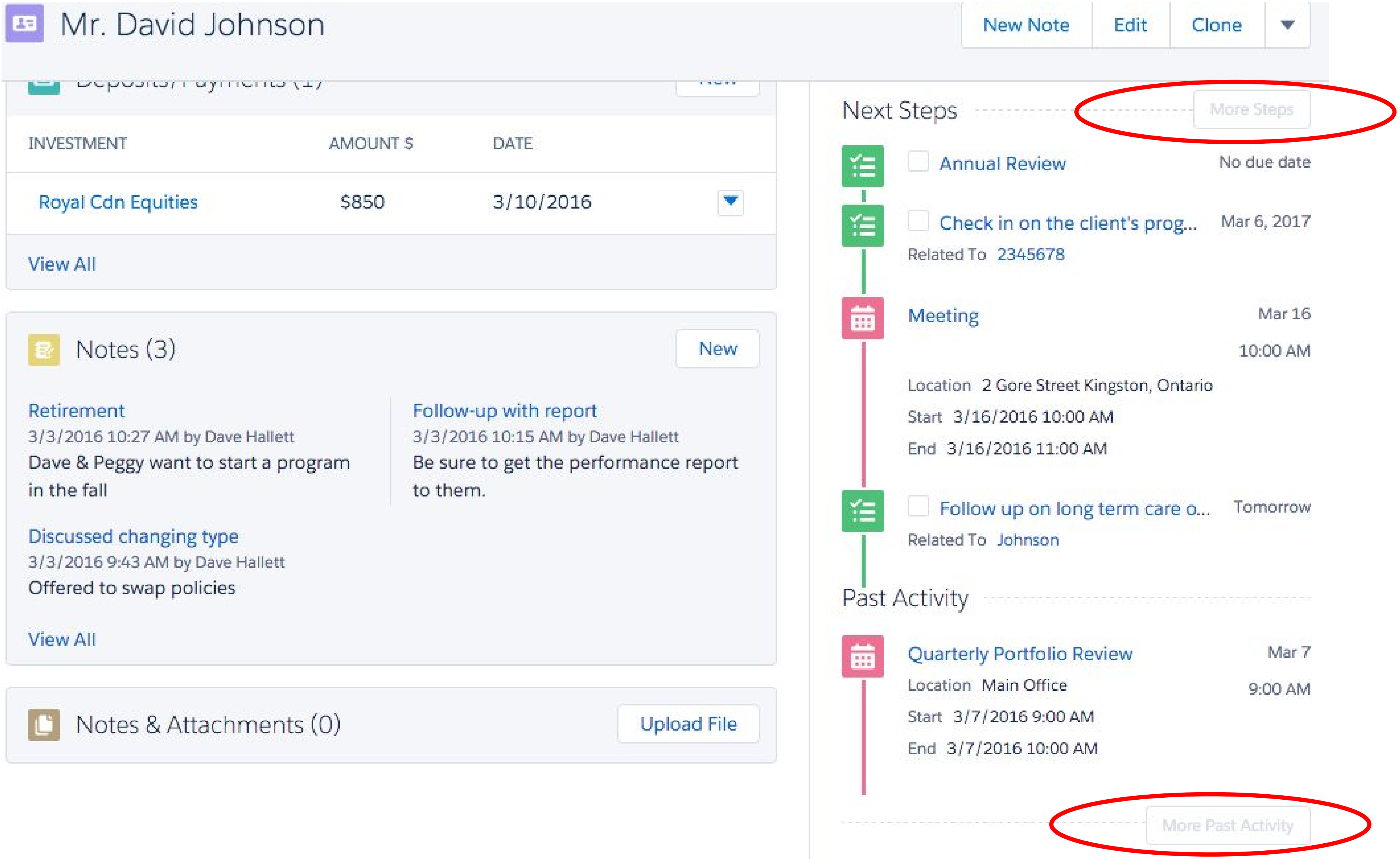
Lightning interface puts activities and activity history front & centre



- Clients and Contacts have four Activity tabs
- Email, New Task, New Event, Log a Call

- All other tabs have three Activity Tabs
- New Task, New Event, Log a Call

Tracking Within Salesforce



Reports

To create or run Reports,

(1) click on the Reports Tab

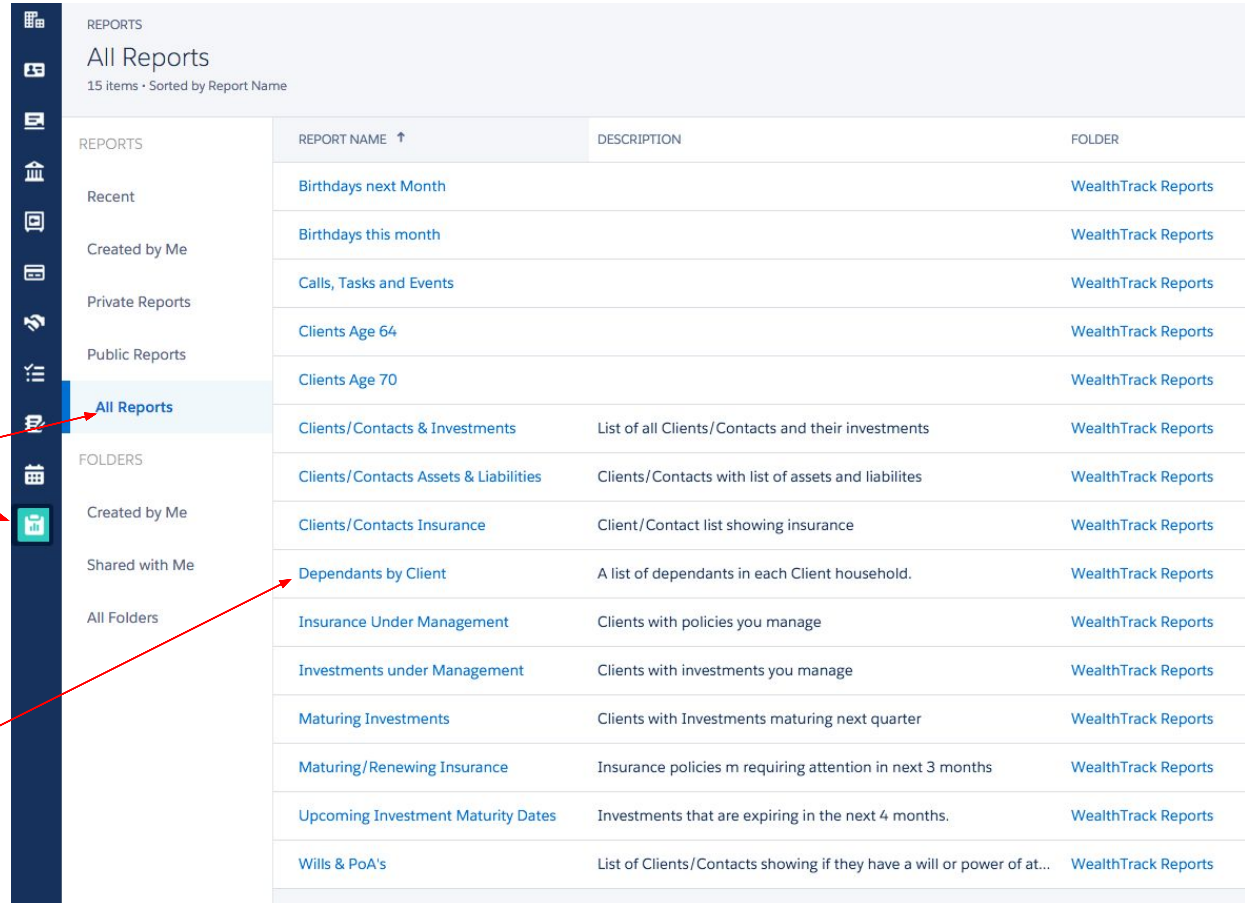
(2) click on all Reports

(3) click on a Report to run

1

2

3



- Reports are easily generated within Salesforce by following a What-You-See-Is-What-You-Get drag and drop wizard, selecting the report format, choosing the fields to report and identifying selection/filter criteria

Thank you for considering WealthTrack!

WealthTrack

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