



Efficient Workflows with Salentica® Elements

Salentica Elements enables users to save time by automating regular workflows that are often a part of an advisors' daily operations.

The "Requests" tab provides users with a sortable list of all active workflows as well as an ability to initiate a new workflow. Each workflow follows predetermined steps to keep processes moving along. Salentica Elements prompts users with tasks and instructions to complete each required step. Managers can manually assign tasks or designate certain "triggers" to launch next steps automatically.

Salentica Elements features 15 pre-built workflows including:

- Address Change
- Change of Contact Info
- Account Update
- Deposit Funds
- Client Meeting
- Reporting Process
- Risk Tolerance Update
- Withdrawal Funds
- New Account Open
- New Client Onboarding
- New Relationship – Prospect
- Portfolio Compliance Audit
- Prospect Outreach
- RMD Distribution
- Rebalance Client Portfolio

REQUEST SUBJECT ↑	RELATIONS...	RECORD TYPE	REQU...	REQUEST STAT...	D...	D...	CURRENT STEP	CURRENT...
1 10k withdrawal	Rogers Family	Client Withdrawal	4/20/2018	New (not submitte...	56	56		Mike Curry
2 Address Change	Rogers Family	Address Change	5/2/2018	New (not submitte...	44	44		Jarred Lawson
3 Address Change for Clarke	Clarke Household	Address Change	6/7/2018	New (not submitte...	8			
4 barker family onboarding	Barker Family	Client Transition - New Acco...	3/8/2018	New (not submitte...	99			
5 Betsy Received TD Ameritra...	Allen Family	Question - Statements	4/3/2018	New (not submitte...	73	73		
6 Call Lilly Ann about Fee adju...	Allen Family	Question - Billing/Fees	2/28/2017	Completed				Melissa Best
7 Call with Harvey	COIs	Client Risk Tolerance Update	4/18/2018	New (not submitte...	58			
8 Change address	Clarke Household	Update of Info - Address Cha...	8/11/2017	Completed				
9 change address	Rogers Family	Update of Info - Address Cha...	8/15/2017	In-Progress	304	287	Update Information at custo...	Jonathan Luc...

View status and sort all relevant workflows at any time via "Requests" on the tab menu.

Benefits of Salentica Elements workflows include:

Accountability

- Documented processes keep team members accountable to their stakeholders.

Transparency

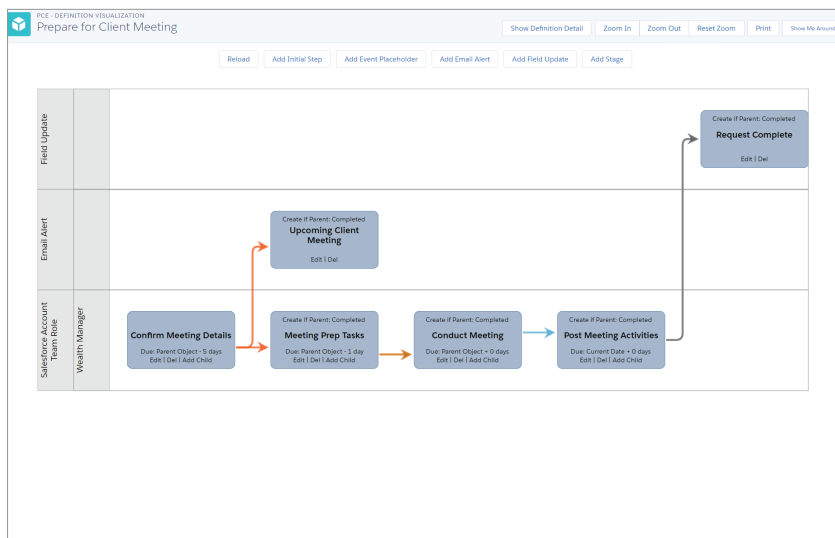
- Defined steps make it easy to see the status of a workflow at any time.

Consistency

- Standardized processes deliver consistent outcomes from every team member.

Wide Adoption

- Automation saves time and creates a preference for working in the system.



Visualize each step and easily customize, clone, or create workflows to match the firm preferences.

About Salentica Elements

Salentica Elements is a flexible CRM solution that provides a pre-built configuration on the Salesforce Lightning Platform. Elements is tailored with specific entities and features that were developed for wealth management firms. Start using Salentica Elements right away to manage your client relationships, build your business development pipeline and streamline operations.

To learn more about Salentica Elements and/or workflows, please call 1-800-727-0605 or email info@salentica.com