Finity360™ Portal

Finity360 Portal is a natively built Salesforce services Portal that allows your customers to communicate directly with you.

Finity360 Portal is a native Salesforce services Portal that allows your customers to communicate directly with you. Create private Workspaces to securely share sensitive financial information with your clients and colleagues. Send updates and get your materials reviewed quickly and with confidence. Customize your Workspaces with your logo and brand colors to reassure clients and keep all your online tools consistent. Customers can access their new account agreements, historical statements, store performance reports text and chatter using regulatory approved communications filters.

Create a better user experience for your customers

Create private Workspaces to securely share sensitive financial information with your clients and colleagues. Upload multiple files at once by simply dragging-and-dropping them directly into your browser. Every event that happens in your Workspace is tracked to see exactly who interacts with your files. View high quality previews of more than 30 different file types, directly in Salesforce desktop and on mobile. Secure spaces and folders make it easy to organize your folders and files exactly the way you want them.

Key Benefits

▶ Securely host and manage your client documents.

▶ Great for Advisor transitions.

▶ Integrates with chatbots and other Salesforce apps.

Benefits of using Finity 360 Portal

At first, the idea of creating an online portal may sound like an expensive venture and a rather complicated task; but after you consider the advantages it provides and how easy it can be with Salesforce, you will change your mind.
Finity 360 Portal offer numerous benefits (such as customizability, mobile-friendliness and on-brand features, a scalable library of templates with no coding necessary, and rich personalization options to meet your business's specific needs) that help companies to:
Build better customer relationships.
• Solve complex organizational problems.
• Benefit multiple departments.
• Save time.
• Cut support costs and increase customer satisfaction.
• Drive product innovation.
• Grow customer retention.
• Improve the digital customer experience.
• Boost new customer acquisition
• Strengthen sales (increase upsell, cross-sell, and add-on revenue).
Thus, Finity360 provides companies with an exceptional framework for extending the organization to outer Finity 360 Portal through Portal Cloud using the Portal Licensing model.

Exact requirements for your business

Send updates and get your materials reviewed quickly and with confidence. Post messages and assign tasks within your Workspace to make collaborating with partners easy, safe and secure. Communicate directly with your customers and maintain your advisory surveillance. Your content is given bank-level encryption in transit and at rest. Only the people you invite can access your data. You determine exactly who has access to your content and the level of permissions each user has.

About Finity360

Finity360, an innovation of Arcus Inc., is a suite of cloud-based document and data management solutions that gives financial institutions the agility, scale and security they need to gain maximum business value from their traditional documents, digital assets, and operational workflows.

Based on more than 30 years of experience in capital markets, securities back-office operations, data aggregation and system integration, Finity360 helps capital markets and other financial services organizations modernize their operations and revenue models by eliminating technology, process, data and regulatory challenges.

1500 Chestnut St. #1009
Philadelphia, Pa 19102
USA

+1 (888) 942-7287

Visit our website

Finity360™