

SmartOffice Pershing NetX360 Integration

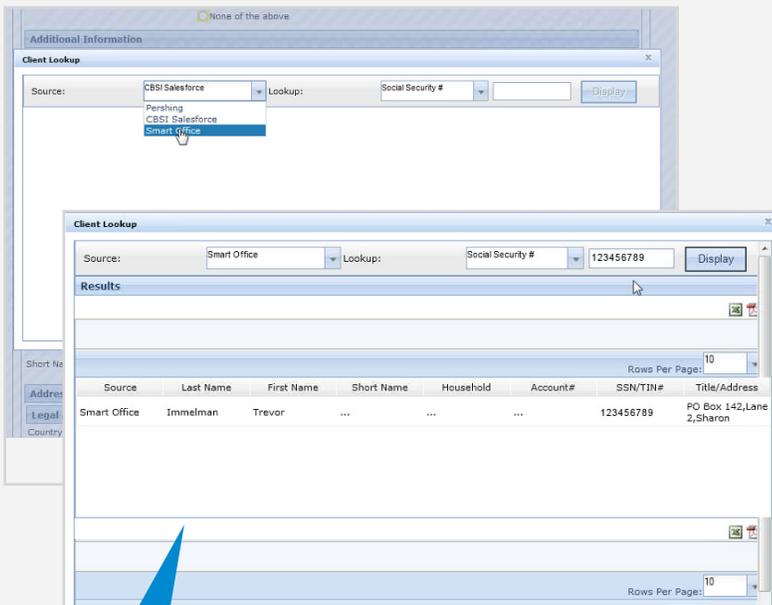
Create an integrated experience between SmartOffice and the NetX360 platform from Pershing

As a financial advisor or Registered Investment Advisor (RIA), you want to maximize the amount of time you spend servicing your clients and growing your business. But if you're juggling multiple technology solutions, you can spend precious time on duplicate data entry. That's more than just an inconvenience; over time, it can chip away at your productivity and get in the way of reaching your business goals.

SmartOffice, Ebix's customer relationship management (CRM) solution for advisors, can help you overcome that obstacle. If you use both SmartOffice and the NetX360 platform from Pershing, you can take advantage of a seamless integration connecting both applications: **SmartLink for Pershing NetX360**.

Key Benefits

- Speed up client onboarding / new-account opening by importing SmartOffice client data directly into NetX360.
- Generate completed new-account forms in minutes.
- Access SmartOffice directly from NetX360 with no second sign-in required.
- Boost your efficiency by working faster while reducing clerical errors.



When you start the client onboarding process in NetX360, you can select SmartOffice as the source of your client data, and then search for the client's SmartOffice contact record to pull that data into NetX360.

Streamlined Client Onboarding / New-Account Opening

SmartLink for Pershing NetX360 lets you leverage the rich customer database you've cultivated in SmartOffice to make the client onboarding process in NetX360 faster, more accurate and more cost-effective. Search directly from NetX360 to find a new client's SmartOffice contact record, and then pull the data from that record into NetX360 to begin the onboarding process. Once that data is imported, you can use it to fill out new-account forms in NetX360 instantly, minimizing the need for time-consuming, error-prone manual data entry.

As a key component of a comprehensive client onboarding strategy, SmartLink for Pershing NetX360 sets you apart from the competition. After all, first impressions are critical to building trust and establishing productive, long-term client-advisor relationships. This solution gives you the tools you need to demonstrate to new clients from Day 1 that your practice prioritizes speedy, efficient service.

Single Sign-On Access

In addition to facilitating the client onboarding process, SmartLink for Pershing NetX360 provides single sign-on (SSO) access from NetX360 to SmartOffice. While signed in to NetX360, you can select the SmartOffice option from NetX360's Tools menu to instantly access SmartOffice, bypassing the SmartOffice sign-in page. The transition is seamless and automatic. The integration works with both the desktop and Web-based versions of NetX360, ensuring the widest possible compatibility.

