

SIMPLY CONNECT XTRAC® TO SALESFORCE®

View, Create and Manage Work and Documents from Inside Salesforce.

The XTRAC App for Salesforce seamlessly connects XTRAC with Salesforce, allowing users to easily view, create and manage work and documents from directly inside of Salesforce.

XTRAC (Cross-business Tracking Routing and Control), is a workflow and document management solution that was built and is used by Fidelity Investments and many other leading companies. With this App, users are connected to the power of XTRAC from right within Salesforce. Users can easily view and manage customer activity such as setting up a new account. New work requests can be easily initiated with all customer information pre-populated. The XTRAC App for Salesforce reduces the need to involve multiple associates and departments to service a customer.

Key Benefits:

- Empower users with a more holistic and integrated view of clients
- Delight customers with ability to immediately respond to inquiries and requests
- Reduce time and errors in initiating and processing work
- Peace of mind that all documents and work history are stored in the XTRAC secure cloud environment

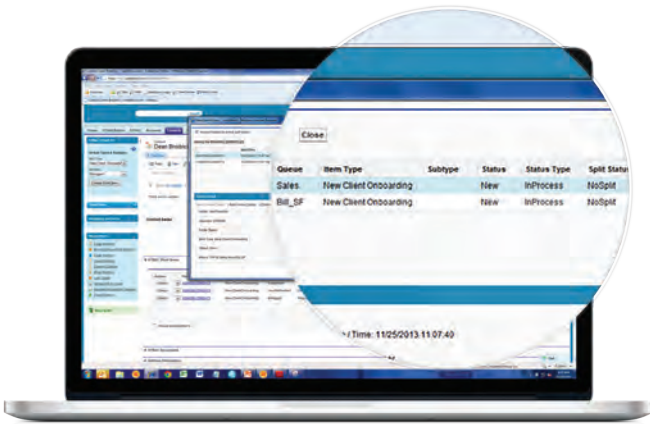


**XTRAC®
WORKFLOW SUITE**

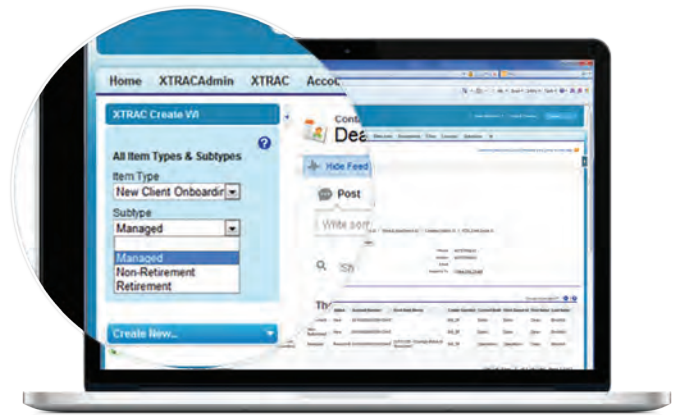
- Workflow Automation
- Hosted Document Management
- Insights & Analytics

XTRAC is a suite of web-based workflow and document management applications pre-configured for financial services and other highly regulated industries.

**XTRAC
SOLUTIONSSM**



View the status and history of work associated with any Account, Contact and/or Opportunity.



Create new work requests (such as an account opening) for any Account, Contact, and/or Opportunity.



Reduce data entry — customer info is pre-populated.



Upload, attach and view documents associated with any Account, Contact and/or Opportunity. All documents are stored in our highly-secure cloud environment.

Get Started Today

You must be an XTRAC customer to download and use the XTRAC App for Salesforce. To get started, please contact us at sales@xtracsolutions.com or **855-WRK-FLOW**.

About XTRAC Solutions

XTRAC Solutions, an independently operated Fidelity Investments company, provides workflow automation and document management. With its solutions used extensively across Fidelity and by many other companies, XTRAC has over 20 years of industry experience managing complex, mission-critical processes that support thousands of users and millions of work items annually. XTRAC delivers excellence in business results and customer satisfaction for all its global clients.

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