

DATA SOLUTIONS

Pre-built Industry Integrations for Seamless CRM Connectivity

SS&C Black Diamond® Wealth Solutions provides powerful CRM Data Solutions designed to eliminate manual data entry and improve advisor productivity. By enabling real-time synchronization between CRM Salesforce or Microsoft Dynamics 365 across our SS&C Black Diamond Wealth Solutions, your team gains a comprehensive and up-to-date view of client information across all systems.

Enterprise CRM Connectivity

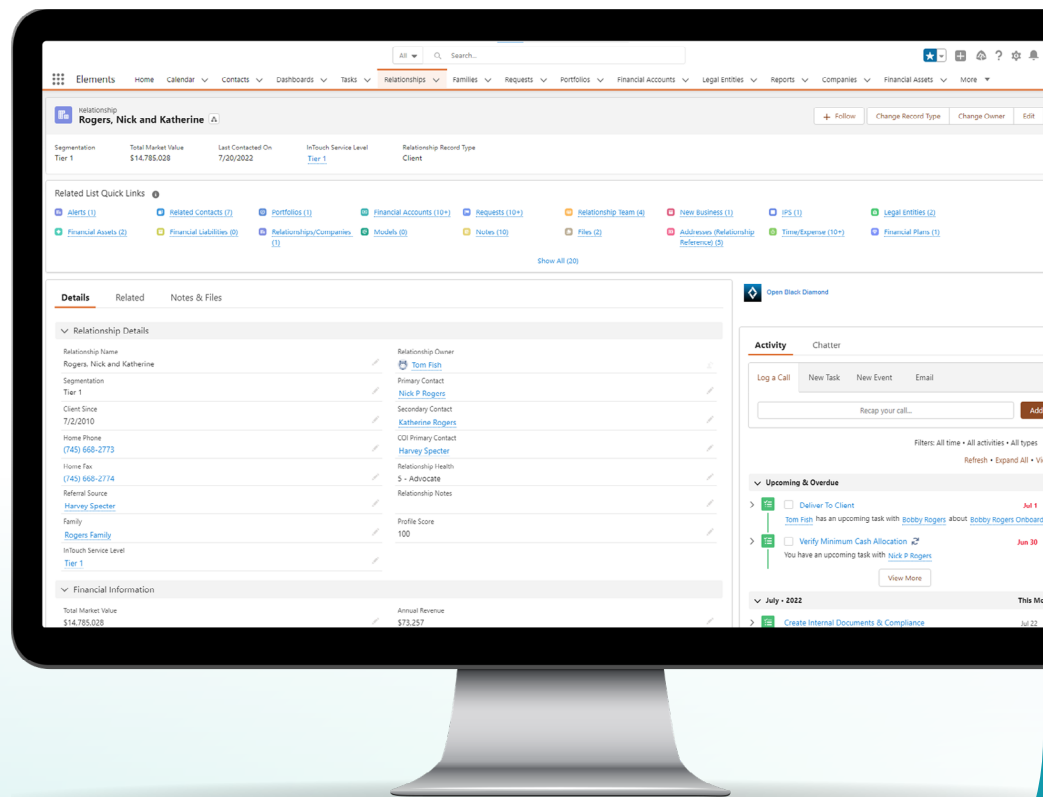
Firms using Salesforce or Microsoft Dynamics 365 can leverage Black Diamond’s cloud-based CRM Integration framework in addition to technology purpose built by vendors within your tech stack to help automate data entry.

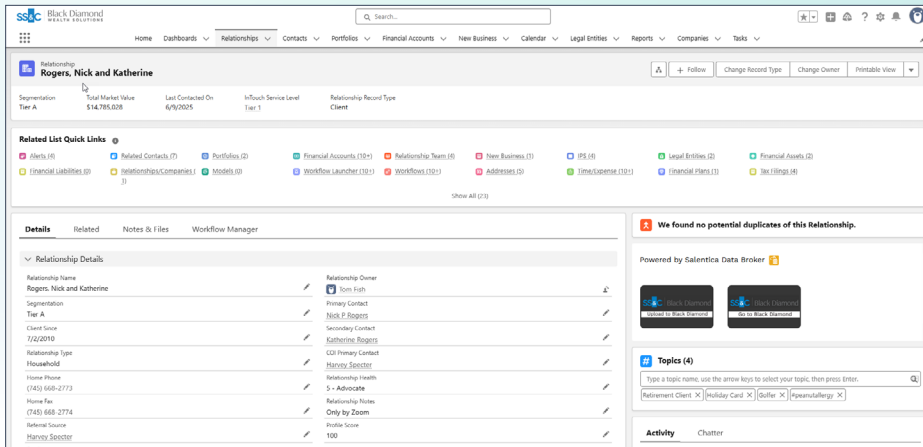
Real-Time, Actionable Data

Stay connected to your business-critical information through:

- Trust and Retirement information
- Portfolio management data
- Financial planning insights

Your CRM becomes a powerful command center, always up to date and ready to support daily workflows.





Effortless Synchronization and Workflow Automation

With Data Solutions from Black Diamond, from within your CRM, you can:

- Sync contacts and relationships automatically
- Keep address data consistent across systems
- Create timeline posts from CRM tasks
- Trigger workflows based on financial account activity
- Access client data directly in Outlook and Office 365
- Use single sign-on and contextual linking for added convenience

Built for Flexibility and Future Growth

Our architecture avoids rigid field mapping or platform-specific limitations. Black Diamond's Data Exchange Service ensures compatibility and adaptability, making it easy to evolve with your business needs.

Persistent Data Availability

Bring data directly into your CRM database for enhanced reporting, dashboards, and process automation from applications across Black Diamond.

Enterprise-Grade Support

Our Black Diamond Wealth Solutions integration is supported by a growing knowledge base, guided implementation resources, and a responsive support team, and is designed to be:

- Cloud-native
- Salesforce Lightning-ready
- Flow and power automate capable
- Secure and scalable

Tailored Integration Services

SS&C Black Diamond Wealth Solutions offers fully customized integration services between your CRM and key platforms. Notably, asset managers using SS&C Genesis benefit from seamless data exchange and persistent data through Black Diamond Data Solutions.

Whether you're working with custodians, third-party financial management systems, or planning tools, Black Diamond Data Solutions delivers flexible integrations.

For more information

Contact us today to learn how SS&C Black Diamond Data Solutions can elevate your CRM experience and support your unique wealth management business.

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