FINITY360™ Tasks

Finity360 Tasks

Finity360 Tasks helps you professionalize your Advisor onboarding process and maintain a single source of truth with best practice templates, automated workflows and powerful work management tools.

Engage and empower the right people at the right time

With Finity360 Tasks, you can involve everyone needed—from your operations and compliance teams to the executive office to deliver every Advisor onboarding project with excellence.

Ensure the visibility you need for continuous improvement and growth.

Finity360 Tasks enables you to monitor current projects, improve the quality of your Advisor onboarding, and scale efficiently.

With Finity360 Tasks, you can capture the insights that will help your teams manage opportunities with precision and ease.

MANAGE YOUR REPUTATION WITH FInity360 tasks and never leave a task undone

Works With

Integrations like these make Tasks more powerful and vice versa

Sales Cloud

Service Cloud

Field Service Lightning

Einstein

Financial Services Cloud

CPQ

Key Benefits

- ▶ Security & Access Controls
- ▶ File Management
- ▶ Workflow & Notifications Engine
- ▶ Reports & Business Insights
- ▶ AI & Analytics
- ▶ Mobile Apps
- ▶ Configuration Toolkit
- ▶ APIs

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