

Fidelity WealthCentral[®] Account Opening/Transfer of Assets Tool Integration with Skience CRM

- Helps to improve your experience with the Account Opening/Transfer of Assets tool by providing the ability to use your own customer data stored in Skience CRM.
 - Minimizes the need to rekey customer data, which helps to drive down clerical errors resulting in NIGOs.



NOTE: If the Account Opening/Transfer of Assets Tool does not display, check that pop-ups are enabled. For additional information on this process, please see the Fidelity WealthCentral Browser Support document. You can find this document in the **System Requirements and Security** section of the Fidelity WealthCentral page in the Products and Services Library (**Resources > Product and Services Library > Tools & Technology > Fidelity WealthCentral**) or via the **document** link on the Fidelity WealthCentral login screen.

We integrated the Account Opening/Transfer of Assets tool with Skience CRM to aid in customer pre-fill of Fidelity forms.

salesforce	Support every customer.
User Name Password	VIEW DEMO
Log in to Salesforce	Lengthere Service cloud
Forget	Your fast track to success. Expertise and insights that help you deliver results faster.

Log into Skience CRM; the Home Tab displays by default.



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When you find the contact, click the associated link to display information about your selection. Then, click the **Open in WealthCentral** button on the **Details Tab**.

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The appropriate sections and fields populate with the information from your CRM system.

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