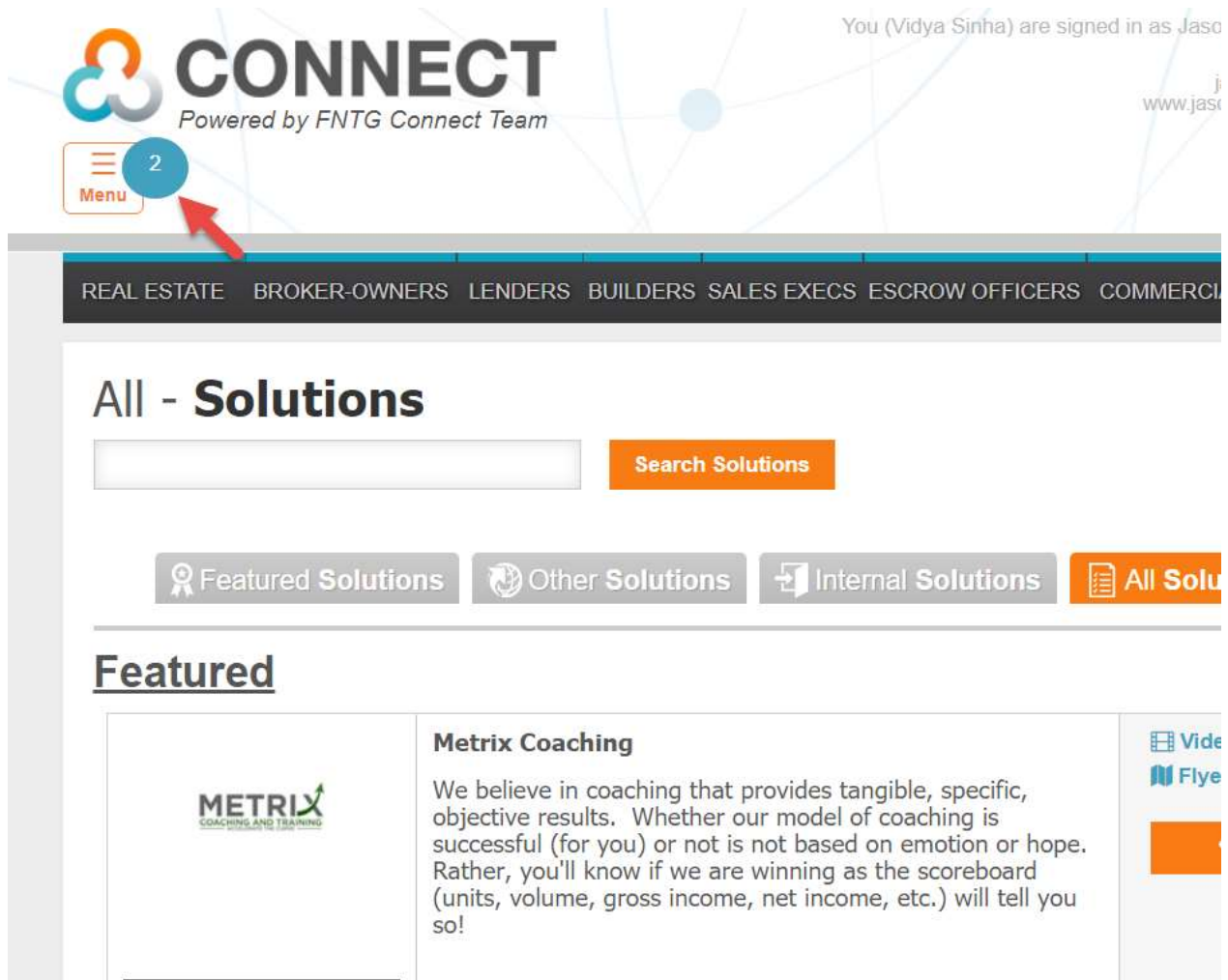


Hey Elite Club Members, we have some exciting new Connect functionality to share with you! We have been doing a lot of work on the backend of Connect to be able to provide client activity as it pertains to business solutions that have been referred through Connect. In the past Sales Executives had to search for this valuable information one client at a time. Not anymore!

Now you'll see a numeric indicator on the right-hand side of the Menu button if you have new client activity in Connect



When you click on the Menu button and select Referred Clients (formerly Clients) from the menu the numeric notification will disappear and you'll be taken to the Referred Clients page. From here you'll be able to see the recent client activity (indicated by Bell icon) for each of the business solutions you've referred.

Total Count: 100

← Previous 1 2 3 4 5 6 7 8 9 Next →

Referral Date	Assigned Date	Status Alert Type	Status Alert Date	Name	Solution
08/07/2013	T 05/01/2014		12/20/2017	Mark Shaw	Corefact
08/12/2013	T 05/01/2014		12/21/2017	Luis Velasco	Corefact
08/14/2013	T 05/01/2014		12/20/2017	Audrey Mcinerney	Corefact
09/20/2013	T 05/01/2014		12/20/2017	David Huntley	Corefact
09/20/2013	T 05/01/2014		12/20/2017	Ken Marson	Corefact
11/19/2013	T 05/01/2014		12/20/2017	Juan Mandrile	Corefact
12/06/2013			12/20/2017	Donna Desino	Corefact

When you click on the Bell icon you'll be able to see the client activity/status back information for that specific business solution. Giving you the ability to follow-up with your client(s) and continue to add value to that relationship.

Referral Date: 08/17/2016

Solution: ProspectNow

Comments: Elizabeth

Referral Email Activity	Value	Last Updated On
Email Opened	0	N/A
Video Viewed	0	N/A
Flyer Viewed	0	N/A

Client Activity	Value	Last Updated On
Last Login Date	2017-10-12 01:33:26	03/25/18
Used CoreFact	No	03/25/18
Used Predictive Score	No	03/25/18
Have saved search	No	03/25/18

This information is proprietary, so do not share this information with your clients. It is for you to use as a guide to know how you can help your clients meet their business objectives, goals, and provide best practices as they utilize the business solution you've referred.

We'll have more details in our upcoming FNTG Connect Newsletter and all the latest functionality of this upcoming release.

Have a great week!