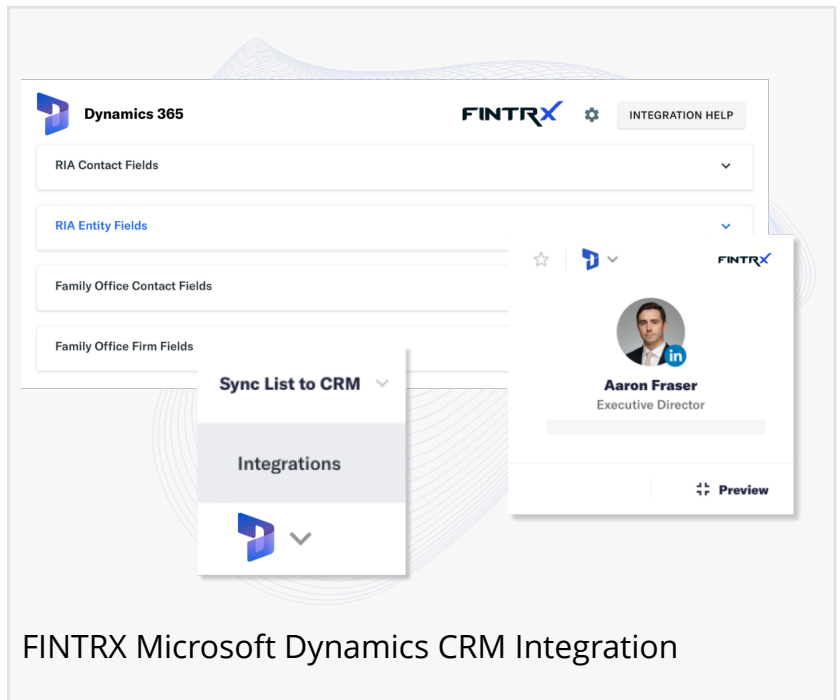


# FINTRX Releases Microsoft Dynamics Integration, Further Expanding Its Growing Suite of CRM Data Feeds

*FINTRX, the leading provider of private wealth data intelligence, has announced its latest integration with Microsoft Dynamics CRM.*

BOSTON, MA, UNITED STATES, January 12, 2024 /EINPresswire.com/ -- FINTRX, the leading provider of private wealth data intelligence, has announced its latest integration with Microsoft Dynamics CRM, a popular customer relationship management platform. This integration enables Microsoft Dynamics CRM users to seamlessly access FINTRX's extensive database of family office and registered investment advisor (RIA) data directly within their CRM system in real time, empowering them to enhance their prospecting and relationship management efforts.



FINTRX Microsoft Dynamics CRM Integration

With this new integration, Microsoft Dynamics CRM users can unlock a wealth of valuable information on single-family offices, multi-family offices, private companies, RIAs, broker dealers, and private wealth teams. By leveraging FINTRX's comprehensive data, users can gain a competitive edge by identifying new prospects, building targeted marketing lists, expand their network, and gathering competitive intelligence.

"Our integration with Microsoft Dynamics CRM is a significant milestone for us on the heels of our recent integrations with LinkedIn, Google, Salesforce, HubSpot, Navatar, and Snowflake," said Russ D'Argento, Founder and CEO of FINTRX. "We are committed to providing our growing customer base with seamless access to the most accurate and up-to-date family office and RIA data, and this integration allows us to extend our reach to even more professionals within the financial services industry."

Key Features and Benefits of the Microsoft Dynamics CRM Integration Include:



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+ Comprehensive Data Access: Users can tap into FINTRX's vast data assets natively within their Microsoft Dynamics CRM.

+ Streamlined Workflows: With the integration, users eliminate the need to switch between multiple platforms to leverage FINTRX data. Users can seamlessly access and manage their prospecting and relationship management activities within their familiar Microsoft Dynamics CRM environment, saving time and increasing productivity.

+ Custom Mapping Options: Users have the flexibility to customize the mapping of each field, ensuring that the FINTRX data aligns perfectly with their unique CRM setup and processes.

+ Real-Time Data Updates: The integration ensures that any updates or changes to the FINTRX data are automatically reflected in the Microsoft Dynamics CRM system, guaranteeing data accuracy and consistency.

+ Full Data Control: FINTRX users have the ability to send and edit specific data points that are vital for their team to drive new business and better manage relationships.

"We are thrilled to offer this integration to our Microsoft Dynamics CRM users," said Brendan Drew, Sr. Data Implementation Specialist at FINTRX. "This integration will empower professionals in the private wealth industry to streamline their workflows, make more informed decisions, and ultimately drive business growth."

To request a demo or learn more about the FINTRX, visit: <https://www.fintrx.com>.

About FINTRX: FINTRX is the preeminent resource for private wealth data and research. Its platform features millions of data points on the global family office and RIA ecosystem. Through seamless integrations with leading CRM platforms, data warehousing tools, and custom API data feeds, FINTRX empowers users to optimize their sales and marketing efforts, gather competitive intelligence, and make more informed business decisions.

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