



SS&C Tier1 Inbox

Smarter CRM Workflows, Right From Your Outlook® Inbox

Tier1 Inbox empowers Capital Markets and Investment Banking professionals to engage clients more efficiently—by embedding Tier1's extensive CRM capabilities and integrations directly into Microsoft Outlook. No switching tabs. Faster, smarter relationship management right where you engage the most, *your* email inbox.

Key Benefits at a Glance

Work Where You Already Are

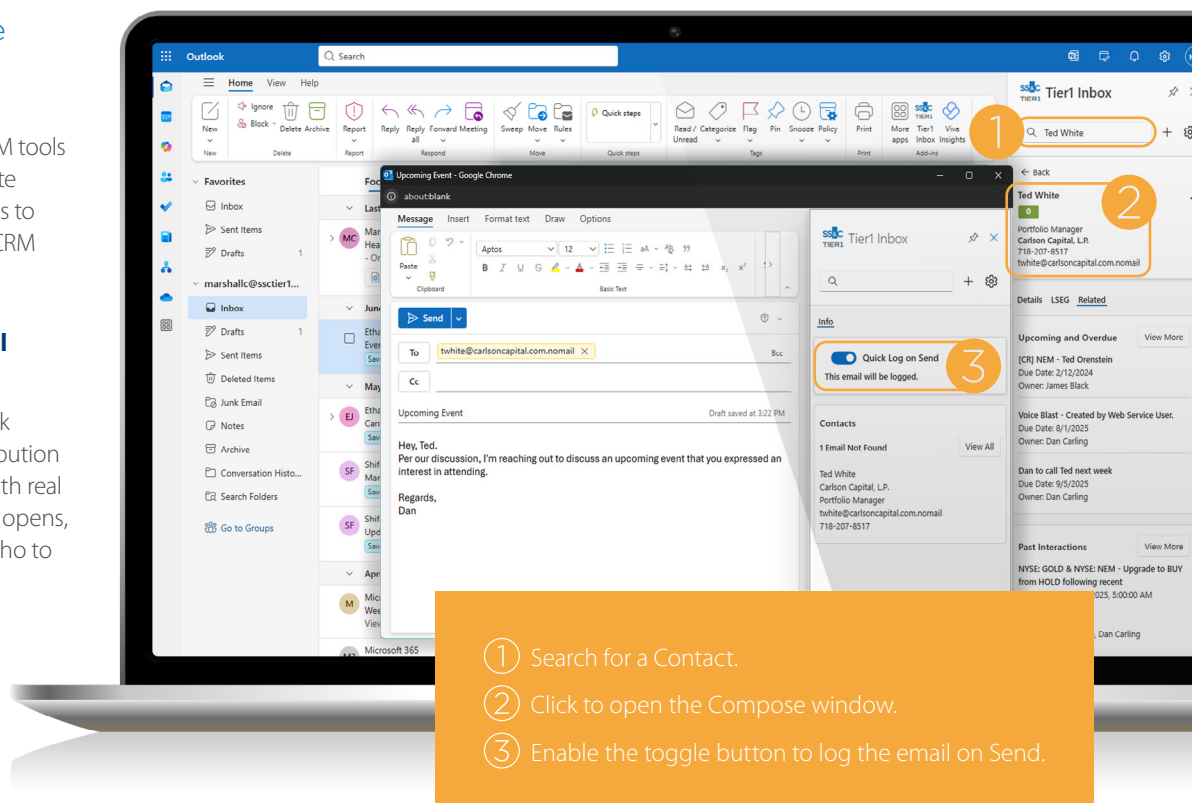
Leverage Tier1's comprehensive CRM tools directly within Outlook—no separate platform to access and learn, screens to juggle or the need to settle for lite CRM tradeoffs.

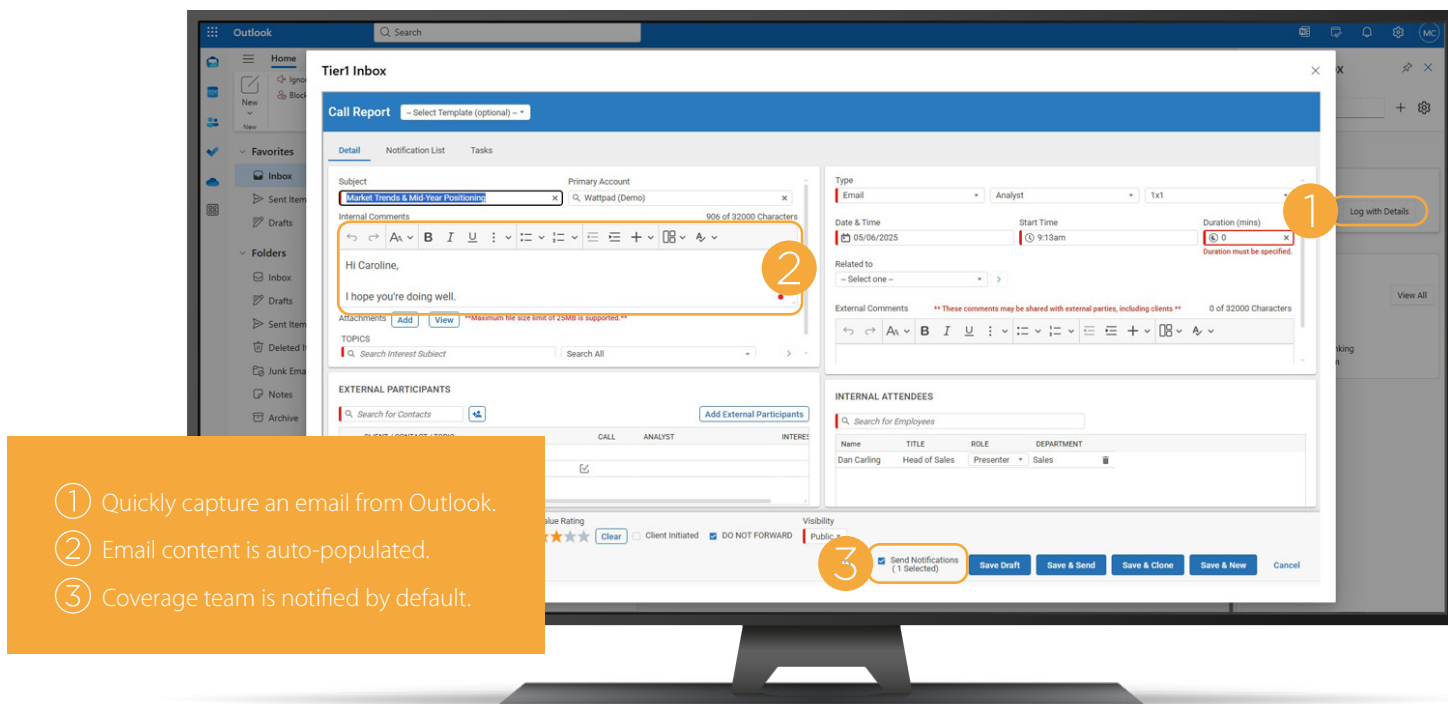
Reduce Friction. Increase Email Impact and Intelligence.

Leverage both your CRM or Outlook based small or large dynamic distribution lists to send personalized, emails with real time reporting insights on delivery, opens, and engagement—so you know who to follow up with, how to follow up or retarget, and when, increasing the opportunity for success.

Stay Organized, Effortlessly. Eliminate the Manual.

Turn emails and meetings into Call Reports or Logged Interactions with one click. Automatically match email messages to account & contact records or create new ones instantly.





- ① Quickly capture an email from Outlook.
- ② Email content is auto-populated.
- ③ Coverage team is notified by default.

Move Faster with Instant Search

Find any contact, account, deal, or custom CRM field without leaving your inbox. Full context, right when you need it.

See the Full Picture. Access a More Complete History of Client Engagement

Access complete contact and account profiles—past activity, deals, notes, and more—at a glance.

How It Works

Tier1 Inbox integrates natively with Outlook to bring your CRM directly into your daily workflow. Whether you're sending an email, preparing for a meeting, or updating records, everything happens in one place—seamlessly, securely, and in real time.

Built for Capital Markets Professionals

Tier1 Inbox was designed specifically for the fast-paced needs of capital markets and banking professionals. By streamlining workflows and centralizing information, it lets you spend less time managing data—and more time building relationships at scale.

Get Started Today

Ready to simplify your inbox and supercharge your client engagement? Let us help you visualize what is possible right within your own inbox. Email christian.ruppenstein@sscinc.com to schedule a live demo or visit tier1fn.com.

