

Fact sheet:

An integrated communications solution for your business



Intelliflo's integration with web-based communications specialist, RingCentral offers an integrated communications solution, including secure automated call recording functionality which:

- Replaces your existing phone system
- Utilises your preferred Intelligent Office storage system
- Integrates with your other apps including Microsoft Outlook, Google Drive and Dropbox
- Allows access to your office number and call recording via your desk phone, laptop, mobile or tablet
- The unified communications package includes, per user, an online meeting and video conference service and screen sharing; all via laptop, tablet or mobile
- The ability to audio record face to face client meetings

Key benefits:



Risk-management – Store call recordings for compliance (including MIFID II), quality monitoring, training and dispute resolution



Flexibility – Have calls follow you wherever you are – at your desk, your mobile or your home office so you never miss a call.



Efficiency – Integrates with Intelligent Office and other business apps so all information is accessed through a single interface



Security – Enjoys the security associated with IO storage options

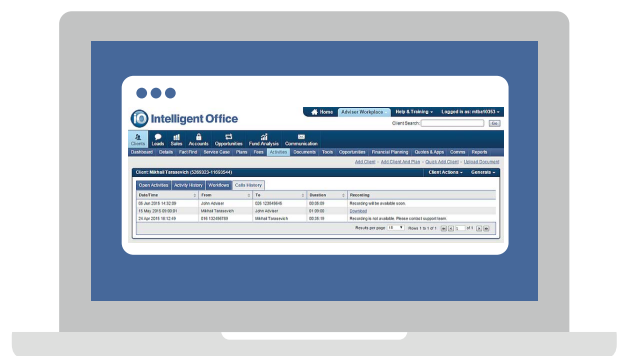


Audit – enablement of call recording is controlled centrally and is fully auditable by your administrators

How it works

All calls to your central business telephone number will be recorded, and any mobile numbers you use can also be linked through to your central business number for call recording purposes. So if you're out and about visiting clients or contacts, your office number can effectively follow you wherever you go and you'll never miss a call being recorded.

All calls will be matched to the individual client record within iO, stored securely and can be easily retrieved – simply download the call from the Call History tab and listen to it using an audio player.



If there is no match or more than one match is found for the call within iO, it is marked as an 'Orphan Call' and can then be manually linked to a client within a new tab, which will be securable.

About RingCentral:

The platform is powered by RingCentral, a Silicon Valley, U.S. business quoted on the New York Stock Exchange with 300,000 customers and a leader in Gartner's 2015 Magic Quadrant for Unified Communications, worldwide.

RingCentral can be a fully OPEX solution and has been selected as a strategic partner for the British Telecom Cloud PBX offering.

Next steps:

5 easy steps and you're ready to go

- Register your interest via the services page of our website <http://www.intelliflo.com/call-recording-for-financial-advisers>
- Your Intelliflo account manager will be in touch to demo the integration and to discuss costs.
- RingCentral will make contact direct with yourselves to discuss the solution and understand your requirements.
- RingCentral will implement your solution and an implementation specialist will work with you to ensure that you are fully set-up and ready to maximise the wide ranging capabilities.
- The integration with RingCentral is then enabled by you in iO, using your secure RingCentral credentials. Your call recordings will now automatically be securely retrieved and processed in iO.

