

# Workflow

Manage tasks the easy way with improved workflow



## Overview

The workflow capability within Intelligent Office offers you unparalleled functionality to sequence and streamline tasks like never before. Built using Microsoft's Windows Workflow Foundation, this tool comes as standard with Intelligent Office, so there's nothing extra to pay.

What's more, setting up a workflow couldn't be easier with our workflow template. From defining user access rights, through to creating the steps, sequences and transition triggers, Intelligent Office has everything you need to streamline your administration and to take your business up a gear.

## Benefits to you



Increases your business efficiency by streamlining and automating processes



Improves productivity and quality control by assigning tasks to specific roles such as compliance



Makes paperwork and paper chasing a thing of the past reducing wastage and saving time



Improving quality of outcome in conjunction with the task functionality, workflow has provisions to answer all possible questions that arise when deciding on or actioning a task, eradicating human error



Frees up billable time for you to spend with clients



Improves visibility of information and issues as you can instantly check the status of the item and identify problems, bottlenecks and monitor end-to-end performance throughout



Process decisions determined by staff can be pre-determined by the workflow, based on business requirements



Provides a repeatable and robust audit trail showing who, when and what actions were performed

## With workflow you will be able to:

### Create dynamic tasks

Giving you the freedom to create and automate workflow tasks when and where they are required in a client or plan lifecycle

### Configure time periods between tasks

Allowing you to set delays between tasks and configure tasks to reflect the working week

### Assign tasks to particular roles

When a task is initiated it is assigned to the most appropriate user

### View tasks and workflows

Not only will you be able to see tasks but also the workflows run against client records together with their status

### Stop workflows mid-task

Allowing you to end a workflow instance at the click of a button, so unnecessary tasks aren't created

## Learn more

If you have any queries relating to **workflows** call us on **0330 102 8402** or email us at [sales@intelliflo.com](mailto:sales@intelliflo.com) where one of our executives would be pleased to help you further.

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