Manage tasks the easy way with improved workflow

The new 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 new 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, we've included everything you will need to streamline your administration and to take your business up a gear.

Benefits for 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

Improves 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 advisers – 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

Automates processes – decisions that were determined by staff can be pre-determined by the workflow, based on business requirements

Provides an 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 e.g. servicing advisers, para-planners etc. – so when a task is initiated it is assigned to the most appropriate user

View tasks and workflows – so 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