



To: News Editors

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## **INTELLIFLO LAUNCHES NEW GROUP SCHEME AND FUND ANALYSIS FUNCTIONALITY**

Leading intermediary software provider IntelliFlo, announces additional upgrades to its award-winning solution, Intelligent Office. The enhancements will also modify the core architecture of Intelligent Office to increase its performance and scalability.

The **Group Schemes** functionality has been enhanced for increased usability and allows IntelliFlo users to record a deeper level of detail for group schemes. The new enhancements enable users to record additional group scheme data including commissions, claims history, leavers and multiple categories. Additional benefits include easy to use importing of group scheme data together with client and plan information. Enhanced wizards also make the administrator's job even easier. At the touch of a button, the upgraded functionality automatically collates and updates core client information such as commissions and contributions. So the once laborious job of pulling up separate information documents and cross-checking against a database becomes a thing of the past.

In a similar vein, to save users both time and money, IntelliFlo have launched a new **Email Integration** functionality which allows users to record emails against client records at the point of sending them. This can be performed from any device including Blackberry and iPhone and any email system including Gmail, Hotmail plus the ubiquitous Microsoft Outlook. This makes the process of recording client communications more accurate and efficient. The new tool will also prevent any communications between adviser and client being lost or misinterpreted – therefore improving accuracy and allowing advisers to devote more time to client-facing work.

A further enhancement is the launch of **Phase 2 of the Fund Analysis** module which allows firms to analyse funds independently of a client record and enables users to create a Portfolio of funds and deliver Portfolio Rebalancing. IntelliFlo works in conjunction with its user group forum to develop additional upgrades such as these, to ensure that its solution is simple, efficient and effective. Once analysis of the funds is complete, users of Intelligent

Office can then add these funds to a Portfolio of recommended funds which can then be used against a client's record.

Nick Eatock, IntelliFlo's Chief Executive Officer stated, "As a business, we are totally committed to continually improving our offering to intermediaries and are delighted with the response to these latest upgrades. Our constant dialogue with clients ensures that we provide IFAs with the most efficient - both in terms of time and cost – entirely web-based software solution within the marketplace."

**Issued on behalf of IntelliFlo by Quill PR.**

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**IntelliFlo** ([www.intelliflo.com](http://www.intelliflo.com)) has been providing Information Technology services to financial services companies, both large and small since its formation in 2004. Its team of dedicated IT and business professionals have expertise across many different markets and technologies, with proven experience delivering effective solutions to a wide range of business needs. In the last year alone IntelliFlo has made over 1,000 major enhancements to Intelligent Office and continues to deliver further improvements at a rapid rate. Intelligent Office is the fastest growing solution in the marketplace with over 6,000 users.

IntelliFlo won the "Best Technology Software Provider" award in the Professional Adviser Awards 2007 and was Highly Commended in 2009. IntelliFlo also won the "Most Enterprising Company' Award" in the Annual UK Business Achievement Awards 2008.