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INTELLIGENT OFFICE'S NEW DASHBOARD HELPS TO DRIVE BUSINESS

IntelliFlo, provider of leading-edge technology solutions for financial services intermediaries, has introduced comprehensive dashboards to its Intelligent Office.net system for intermediaries. The dashboards can be configured for different roles in an organization and provide a snapshot view of work in progress for financial advisers and their managers. This new functionality will dramatically enhance the productivity of Intelligent Office users.

Dashboards have been designed to provide summary information and key statistics at Administration, Adviser, Group and Client level and to help users plan their work efficiently. The dashboard will be the first screen a user sees when logging on to Intelligent Office and has short cut links to appropriate areas of the system. Every client organization will have immediate access to the dashboards and will be able to configure for themselves which roles view which dashboards.

The dashboard will help users to plan day to day work with information including:

- overdue tasks
- tasks due today
- total number of clients and leads
- opportunities and their relative value
- best performing advisers
- an adviser's commission submitted and paid
- the number of cases in compliance for an adviser
- the number of fact finds (holistic and limited advice) created
- the number of fact finds an adviser has checked out.

Nick Eatock, Chief Executive Officer of IntelliFlo, commented: "Intelligent Office is designed to make it easier for adviser firms to do their job effectively and efficiently and to meet business objectives. The dashboard is the latest major enhancement to the system to help IFAs get an instant overview of their work in progress and to go quickly to the relevant areas in the system without having to navigate through a number of stages. Our continued development as the first solutions provider in the marketplace to develop and deliver live .NET applications sets us apart.



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Editors' notes

Intelligent Office is the premier Net Native front and back office system for Independent Financial Advisers and Mortgage Brokers. It is a totally Internet based system, so does not require the cost of additional software or hardware to run which makes it unique within the current UK IFA community. It has a proven track record in functionality, scalability and performance with thousands of users accessing the system every day.

IntelliFlo has been providing Information Technology services to companies large and small since its formation in 1997. Its team of dedicated IT and business professionals have collective expertise across many different markets and are highly skilled in a whole host of technologies. They have proven experience in delivering effective solutions meeting a wide range of business needs.

In the last year IntelliFlo has made over 2000 amendments to Intelligent Office and continues to deliver large and small enhancements to the product at a rapid rate. Typically enhancements requested by clients are delivered for free within two months.