





023 9282 2254 • info@dthomas.co.uk www.dthomas.co.uk

Dunstan Thomas Building 3000 Lakeside North Harbour Portsmouth PO6 3EN

Scalable role based portal framework with unrivalled flexibility delivering exceptional customer experience.

An award winning portal solution with unlimited third party integration capabilities, workflow technology and an API that enables users to take control. Integro CX delivers portal and dashboard technology solutions for the bespoke needs of wealth managers, platforms and providers. Exceptional user experience makes the complex understandable.



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RESPONSIVE DESIGN

Integro CX is designed to fit all screens



- Integro CX automatically resizes according to screen size
- The same content is displayed across all screen sizes*
- The Integro CX layout can fit on mobile devices, down to 320px wide *excluding App Authoring admin functions which require a minimum screen size



Integro CX provides dashboards, and portals for the financial services market.

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egro CX provides highly configurable, alable portal solutions, with workflow and document management capabilities.

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The Integro CX API is able to integrate into any number of data sources to provide access that extends the life of systems.

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Dashboards and portals with award winning user experience Integro CX is a component based framework, that provides flexibility and agility so that information and insight can be delivered in an engaging way to users.



Dunstan Thomas

Integro CX uses leading edge technologies to future proof IT investments







financial advisers or clients.

user experiences.

Integro CX is built to provide exceptional

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Whether you are integrating or optimising your legacy systems, or in need of solutions that will provide leading edge dashboard, portal and workflow solutions, Integro CX is designed for unique solutions with innovative technology that meet the demands of the financial services market.

Integro CX can be used across the market

where users can be administrative users,



APPS App based framework

- Apps expand to show more detail
- Expanded Apps fit all screens
- Settings mode allows users to customise the position of Apps in their portal





From desktop to mobile

Enter settings mode to customise your portal

Click and drag to move apps around.

INTEGRO CX

Adviser view

Role based dashboard configuration aimed at enhanced user experience for both advisers and paraplanners.

Investor view

Role based dashboard aimed at a tailored user experience for end customers designed to make online engagement the preferred method.

Transactions & contributions

Workflow enabled user journeys to allow straight through processing of most new business, and money in transactions.

Portal & dashboard

Dashboards can be tailored to individual roles allowing the brand, content and user permissions to be varied.

Client management

Administration roles can allow allocation of customers to advisers.

Marketing

Onboard content management application to allow rapid multi-level content to be pushed to each role's dashboard.

Product drilldown

Portfolio application allows multi-level view of a product into the most granular level of detail.

Data consolitation

When in Integro CX integrates with multiple systems of records the user experience is that of a single view.



Onboard analytics tools and integration with Google analytics provide comprehensive user analytics.

Servicing transactions

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Adviser

Role

Adviser Data Co,

AUTHENTICATION

Workflow enabled user journeys to allow straight through processing of most servicing, personal data updates, trading requests and money off transactions.

*

ections & contributions

dation & business rules

Servicing transactions

Workflow engine



Prospect and session data capability to allow presales data to be persisted and sessions to be stopped and restarted at any time.

Management information

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Role

INTEGRO CX HUR

Tools to allow MI data to be interrogated and the result presented on screen or via an on the fly document.



Document management

Document storage and retrieval including document timeline user interface.

Content management

Core application allowing administrator users to push content to dashboards on a role by role basis.

Workflow engine

Allows rapid development of user journeys.

User management

User creation, suspension, permissions, linked roles and password administration.

INTEGRO CX HUB -

Asset data plug in

If a third party system is used for the storage and mapping of asset data, a separate plug in exists to utilise this data in user journeys.

Authentication plug in

Integro CX can utilise a company's existing authentication module.

Platform plug in

Integro CX already integrates with several of the most popular platform administration systems and additional integrations are planned.

Fee & charges plug in

If a third party system is used for the storage and application of product and advice charges, a seperate plug in exists to overlay this data on the customer's producy holdings.

Admin plug in

Integro CX can integrate with any number of policy administration systems including the Imago Administration system.

Illustration plug in

Convert product, charges and investment data into suitable format for passing requests to illustration engines and handling data and document responses.

Doc storage plug in

Numerous plug in options to meta data based or folder hierarchy document storage systems

AUTHENTICATION •

Roles & permissions

Integro CX roles.and permissions can be mapped and updated from third party systems

Single sign on

Integro CX has integrated with most leading SSO methods, both inbound and outbound.

ASSET DATA

Roles & permissions

Integro CX is able to utilise data held on third party systems for illustrations, reporting and asset selection within user journeys.

CLIENT INDEX

Roles & permissions

Integro CX can both read and write customer data to and from a customer index, ensuring integrity of a single source of truth.



Trading platforms typically provide tax wrapper management, trading, cash reconciliation and customer records

FEES & CHARGES

Third party fees and charges systems may be used as an alternative to functionality within a Trading Platform system.



Roles & permissions

Roles and permissions hierarchy manageable by administrator role. administration.

Data validations & business rules

The workflow engine overlay allows configuration of validation and business rules to user journeys.

Security

Onboard optional security module.

DOCUMENT MANAGEMENT

Static document

Library of static documents allowing updates to be provided seamlessly.

Meta data

Storage and retrieval of client specific documents utilising associated meta data.

Client documents

Generation, storage and retrieval services.

Permissions hierachy

Storage and retrieval of client specific documents utilising folder hierarchy.

THIRD PARTY TOOLS

Integro CX can integrate with third party tools either by presenting data within the portal screens or by incorporating third party web screens seamlessly into dashboards and user journeys.

IMAGO ILLUSTRATIONS

Dunstan Thomas has a highly configurable illustration system providing both COBS and MIFID regulatory outputs for all tax wrappers. More details can be found in the Imago product section.



IMAGO ADMINISTRATION

Dunstan Thomas has a feature rich policy administration system providing tax wrapper management for pensions and ISA products. More details can be found in the Imago product section.

CONFIGURATION

Configuring Integro CX for your needs

	Configuring an App in the	e authoring mode		
	Now configure your App by defining common attributes such as its name and description as well as custom configurations specific to this App.			
Sample nested system	Permissions allow you to decide which user Roles can access your App and how they interact with it, you can even allow them to overwrite your default configuration and enter their			
Workflow Examples	own custom configuration either at a user level or at a (role) temple	ate level.		
Sample wizard (Pizza)	Your Custom Content App			
Style Guide	This App can be configured to show HTML content. Use the customisation tab to change the background colour preview of the App			
System management	or image and the content that appears in here.			
Contact us				
My details				
Documentation	CONFIGURATION CUSTOMISATION PERMISS	SIONS		
Change password	Level 1	Normal state i		
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	Click action i Do nothing	Your Custom Content App		
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	Configuring an App in the authoring mode
	Now configure your App by defining common attributes such as its name and description as well as custom configurations specific to this App.
> Sample nested system	Permissions allow you to decide which user Roles can occess your App and how they interact with it, you can even allow them to overwrite your default configuration and enter their own outport onfiguration either at a user level or at a (role) template level.
> Workflow Examples	Your Custom Content App
> Sample wizard (Pizza)	This App can be configured to show This is a non interactive
> Style Guide	HTML content. Use the customisation tab to change the background colour preview of the App you are
> System management	or image and the content that configuring.
> Contact us	
> My details	
> Documentation	CONFIGURATION CUSTOMISATION PERMISSIONS
> Change password	Ganard
	Finabled i Z
	Nome Custom Content App
	Allows configuration of the content of the App for use as information or ochertisment
	odvertisment.





BRANDING Make the Integro CX your own

- Branding is applied dynamically at the Role level, User level or calling URL.
- Brands can be previewed using the built in Styleguide help feature.
- Branding applies to all elements of Integro CX.
- Works across all devices.

The Customisation tab is a feature of an App

Allowing users to

customise specific

features of the App.

user configurability and enhances the user

tab is used to gather general and App specific

Permissions can be defined for an App, such

as which roles can see it, whether it is pre-installed

and an optional period

for annoucements or

seasonal Apps.

in time when this App is available, which is useful

an App.

experience.

This enhances the end

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CREATING POWERFUL PLATFORMS Developing systems with the Integro CX form rendering capability

NTEGROCX		mmory > Product summary		Client search
III HOME	SIPP - Mr Andrew No			
> Contact us	View and manage product details and d	rill down into more detail.		
> Change password				
	Total value £697,616.08 As at 19 August 2012	3	Percent change + 0.50% A Since 18 August 2012	•
	SIPP bank account £36,259.73	Assets £560,132.36	Administrator Andie Ministrator	Plan anniversary 29 March
	Borrowing -ES3,776 ::	Property portfolio £155,000 :::	Pension paid in current tax year £0.00	Annual allowance £40,000 :::
			Protection held Yes	
				MINTEGROCX
	Transaction Investments history	Contributions & transfers in Benefits	Pension Beneficiary of protection details of	III HOME
				> Contact us
				 Change password
				O LOG OUT









Financial Technology

Technology solutions for wealth managers, platforms and providers. Making the complex understandable with exceptional user experiences.



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