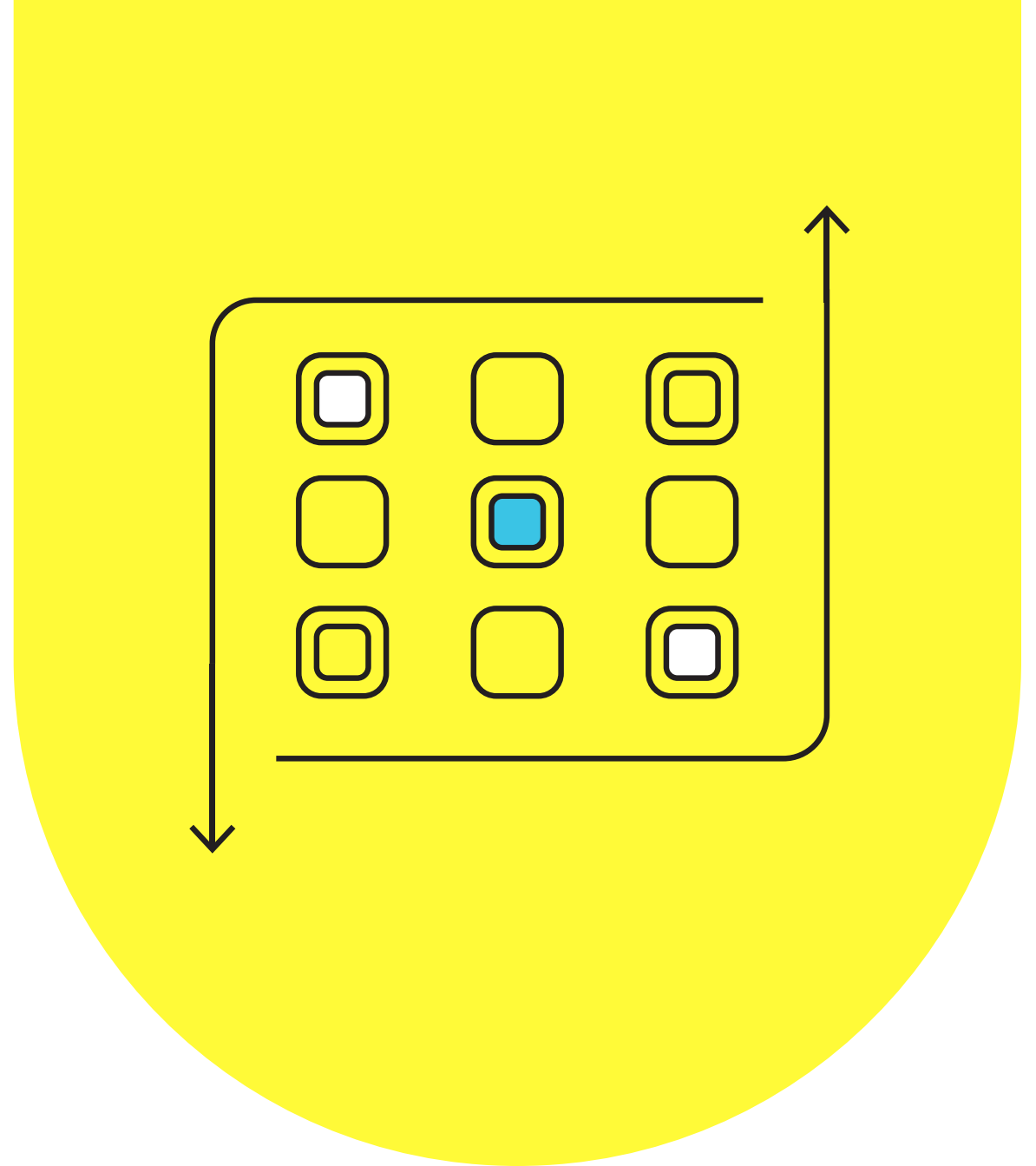intelliflo store

⟶ Developing and publishing your app on the intelliflo store

intelliflo.com

The online marketplace for a host of → integrated apps

Through intelliflo store users can browse and install apps from our partners to fill process gaps in their business or provide their clients with an enhanced experience. If your firm has a way of adding functionality to the advice process and would like exposure to an audience of advice firms, then the intelliflo store is a very easy way of doing so.
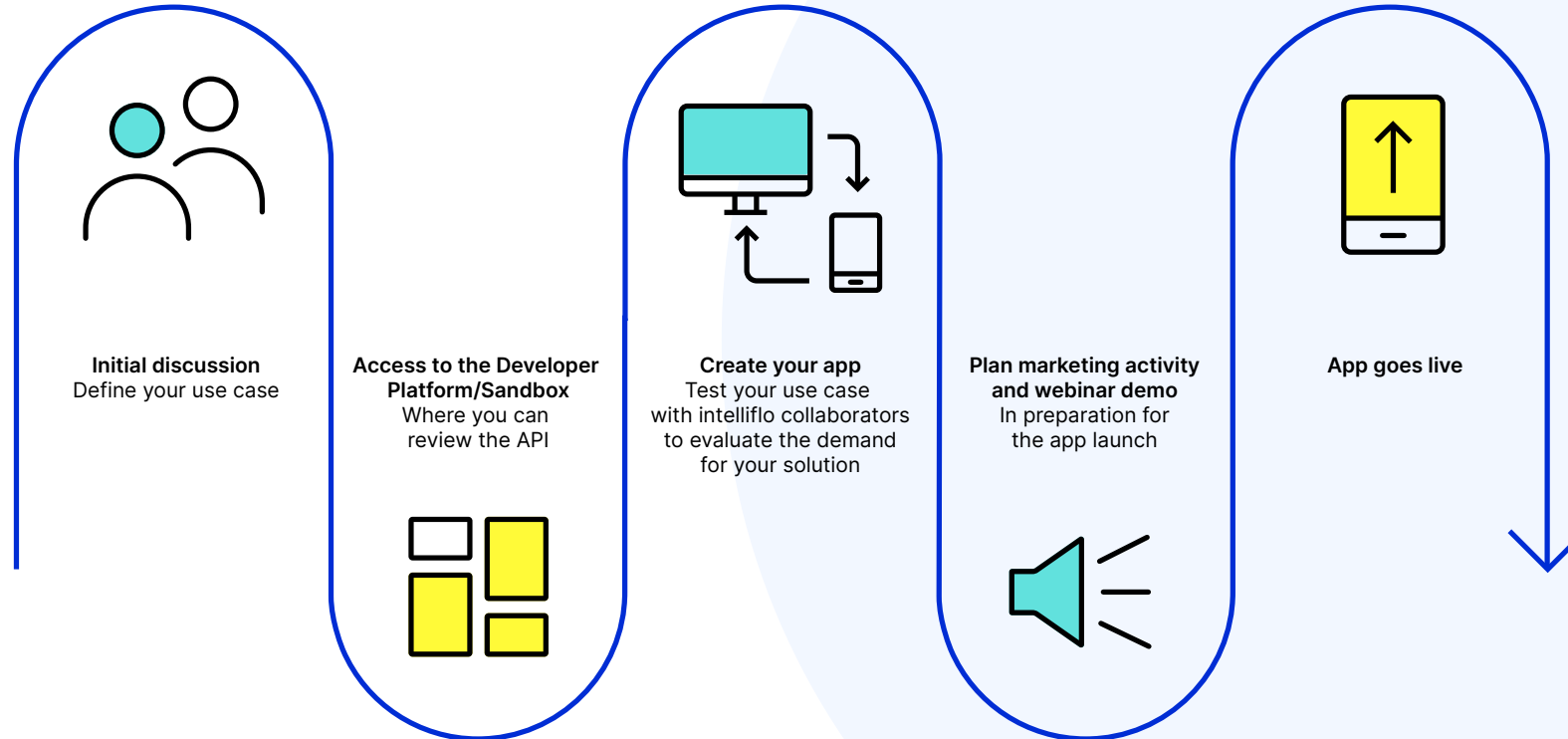
Discover new functionality to enhance your work

- The intelliflo store is intelliflo's way of increasing the sphere of partners and usability within intelliflo office.

- It is a store front which intelliflo office users can peruse to discover new partners and functionality that can improve and enhance the way they work.

- From platforms and partners to product providers, automated suitability reports and financial planning apps

- The intelliflo store is an ever-growing suite of functionality.

intelliflo store –
app process

Initial discussion
Define your use case

Access to the Developer Platform/Sandbox
Where you can review the API

Create your app
Test your use case with intelliflo collaborators to evaluate the demand for your solution

Plan marketing activity and webinar demo
In preparation for the app launch

App goes live

Why offer your app on it?

The intelliflo store is available to all users of intelliflo office. It is designed to enable advice firms to be able to work with the products and partners of their choosing in a quick and flexible manner by extending their own functionality in intelliflo office.

Why publish your app?

The intelliflo store is a meritocracy – intelliflo office users can peruse all the available apps and functionality and install the ones that best fit their individual needs. From well-established industry names to newcomers exploiting gaps in the advice process and everything in between, the functionality is showcased to users of intelliflo office.
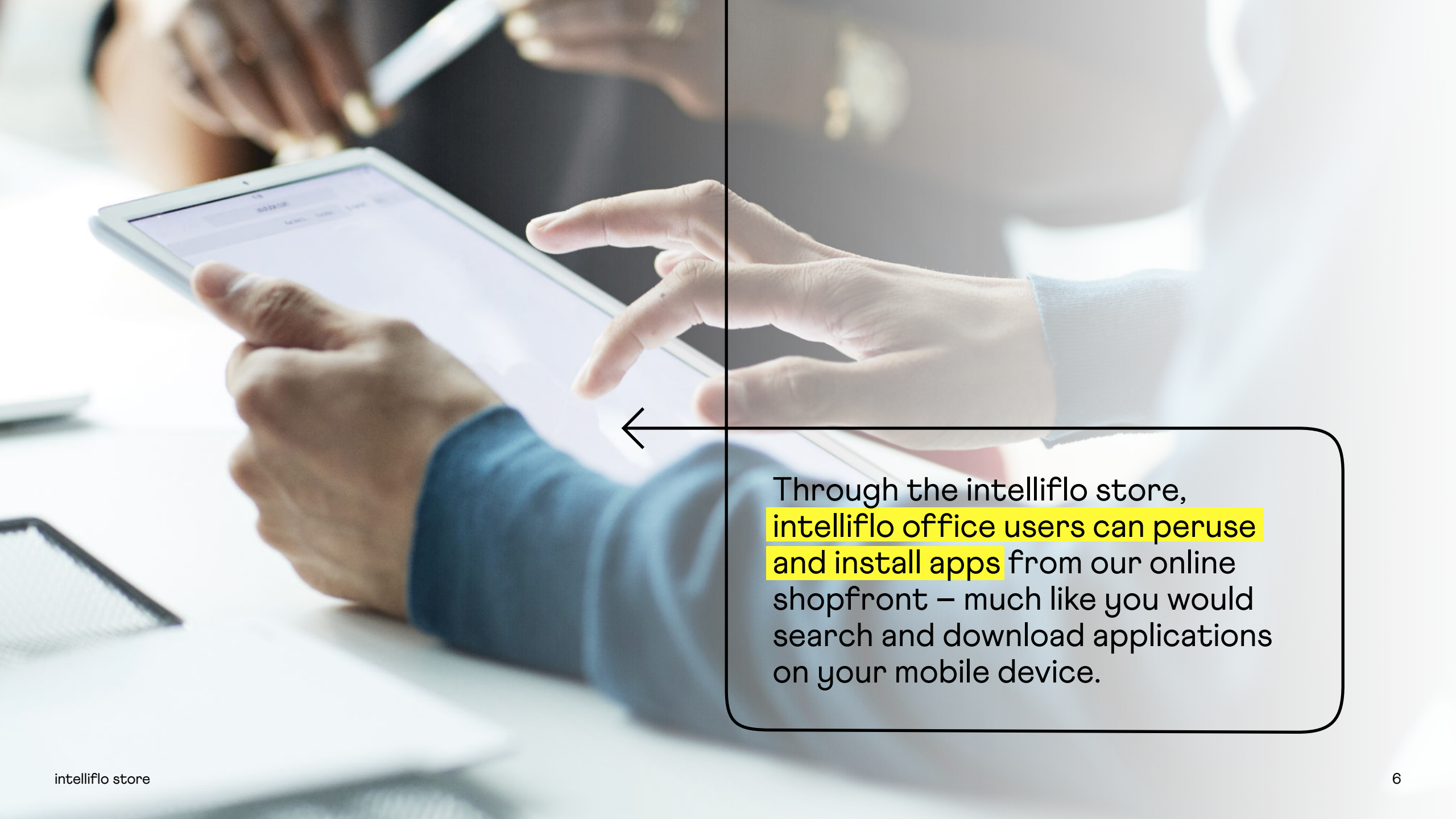
What's the return?

In reaching a significant proportion of the UK advice landscape, the intelliflo store gives product providers and other advice solutions providers the opportunity to increase their exposure in the industry. There are no upfront fees for offering your product in the intelliflo store. We have a range of commercial models available to app providers thereafter though and we would be happy to speak to you about these.

Make your service more accessible

By making your services easily accessible to financial advice firms, you can help to keep them using your services. If they can interact with you via their business management software, it makes life much easier and more efficient for them going forward, encouraging use of your services in a seamlessly integrated way.

How big is the audience?

intelliflo office is used by over 2,500+ firms and over 25,000+ individual users. This means that over a third of UK advice firms are using intelliflo office. The intelliflo store presents a significant shop window in which to offer your services. intelliflo office is not just used by IFAs, either, with users covering advisers, paraplanners and administrators, meaning that any functionality which adds extensibility to any part of the advice process is relevant.

Through the intelliflo store, ==intelliflo office users can peruse and install apps== from our online shopfront – much like you would search and download applications on your mobile device.

How do I start?

Offering your app in the intelliflo store is easy. Anyone can access the intelliflo Developer Platform. From here you can browse the APIs which have been created already. This is a constantly evolving pool of functionality which can be used to see how other people are developing and creating their apps for the intelliflo store. We have a suite of help files and tutorials available too, in order to help you get started. Beyond that, you can also test your app in our sandbox environment and test it against an intelliflo office account.
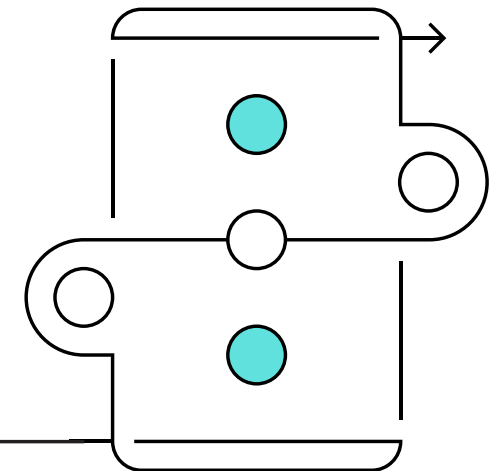
Why publish your app?

Now. The intelliflo store has been open since March 2018 and we are increasing the number of apps provided within it all the time, so it is never too early, nor too late, to get started and publish your app in the store.

Are there any restrictions?

The final say in the publication of any apps in the intelliflo store is at intelliflo's discretion. We work with all of the proposed apps to ensure that apps are thoroughly tested, secure and fit for purpose. Once an app has been developed in the testing environment, the app developer can request its publication. intelliflo will then examine and further test the app before it is made available in the intelliflo store.

There are no restrictions on who can build an app for the purposes of publication in the intelliflo store, though. We welcome applications from anyone who has something to offer to the financial advice industry. For more information about the approval process, please visit the Developer Platform.

The practical steps

App development is simple. We have the intelliflo Developer Platform open and available to all.
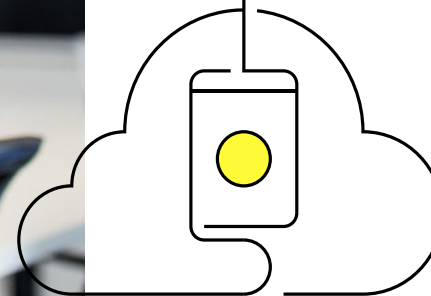
Simply follow this link to start your development journey: https://developer.gb.intelliflo.net

You only need a GitHub login to access the platform. Once you are signed in, you will be given three options:

• Create app – get started with building your app

• Help and documentation – there are a host of resources here to get you started

• Explore the API – explore

How can I test my app?

Creating an app will also create a username and password for an intelliflo office sandbox account, where you can create clients and plans in order to test your own use case for your app. Dedicated API development support is available at developer@intelliflo.com

intelliflo store

Here for you

Our new unified approach gives us enormous reach and capabilities that can better meet your demands. We'd love to speak to you about how we can help provide more for you, your team or your clients.

→ click intelliflo.com