SYMPHONY

TASKIZE
MAKE WORK FLOW

Real-time post-trade issue resolution across Taskize and Symphony

For post-trade issue resolution that requires efficient collaboration between front and back office, operations staff using Taskize can seamlessly notify and collaborate with users on Symphony, giving parties the best of both systems.

This integration enables real-time collaboration between Symphony-based front-office users and Taskize-based operations teams. Both parties benefit from Taskize's workflow, routing and business intelligence capabilities as a result.

Resolve issues faster

Quickly find and engage the right person in the right team, without having to revert to emails or phone or leave Symphony.

Reduce risk of human error

Users remain in the platform of their choice, removing risks around manually copying information from one system to another.

Get actionable insights

All interactions are recorded in Taskize Bubbles giving a complete audit trail. Service levels, performance activity and resolution times are also tracked.

Use case example

1. One of many example use cases might be when a portfolio reconciliation break requires transaction details to be confirmed
2. Back office/operations team member creates a Taskize Bubble and invites a Symphony user linked to a business unit
3. The integration automatically creates a Symphony Room where the Symphony user joins to respond to the issue
4. Both users remain in their preferred platform and messages are updated in real-time
5. Both parties communicate to resolve the query and both platforms automatically confirm when the issue has been resolved

Key benefits

- Use the right tool for the job – no need to be trained on additional systems
- See an issue summary in Symphony and manage it with Taskize, attending to only what is relevant to you
- Flexible mapping from Taskize work allocation into Symphony rooms
- Both platforms support Single Sign On for a smooth user experience
- Security and compliance-enabling features maintained across both platforms

Taskize   **Symphony**