

Integration overview

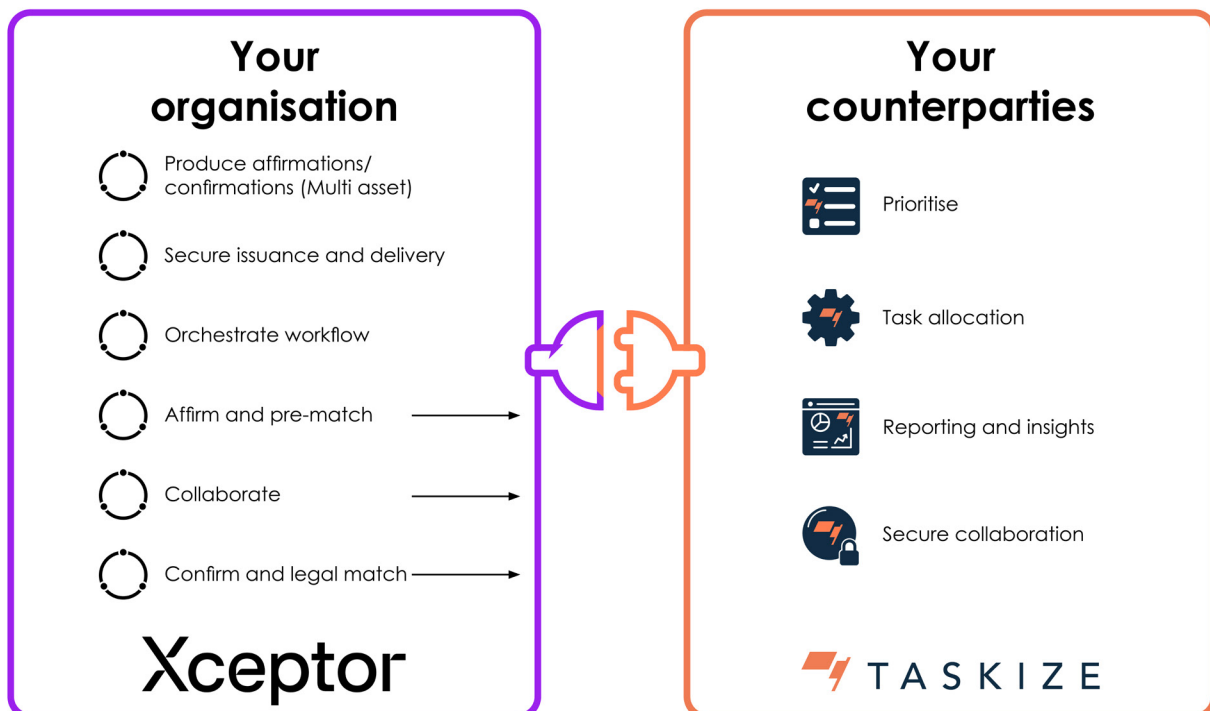
Boost operational efficiency and lower risks and costs for settlement affirmation

With the Taskize and Xceptor integration you can resolve exceptions faster and more efficiently at the click of a button.

Within the Xceptor affirmation and confirmation product, clients can enhance their customer's experience by connecting seamlessly to Taskize, a secure collaboration and workflow platform designed for resolving exceptions.

Confirmations and affirmations are seamlessly directed to the appropriate individual at the counterparty for resolution through Taskize, eliminating the need for manual data copying that could jeopardise information security.

Taskize empowers users to prioritise their tasks efficiently and offers a transparent overview of issues and progress whilst also providing a fully auditable workflow to determine root cause analysis and enhance efficiencies. You are kept up to date with the status of your confirmations in real-time, providing greater clarity and accuracy of your risk.





Resolve issues faster

Quickly find and engage the right person in the right team, without having to revert to email, phone, or fax.



Secure and efficient workflow

Key information is automatically pre-populated into Taskize Bubbles, removing risks around manually copying of information from one system to another. You'll remain in Xceptor, where your confirmations reside in your workflow, resulting in accurate and rapid affirmation, delivery and exchange of trade data. Your customers will use Taskize as a secure and efficient way of collaborating with you.



Get actionable insights

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

Summary

Drive more traffic to your business, reduce costs and risk, and confirm trades even where there is no common data structure.

- Faster resolution time
- Improved client experience
- Less manual input
- Fewer risks of errors
- Secure and auditable delivery channel
- Reduce volume of emails, phone calls, and fax messages
- Avoid re-keying data
- More accurate management information reporting
- One platform to consolidate and control the issuance and matching of multi-asset confirmations
- Communications are recorded in both platforms for easy viewing of the latest updates and for auditing

Simon Gibbs
Head of Partnerships, Taskize
simon.gibbs@taskize.com

Neil Sheppard
Key Account Director, Xceptor
neil.sheppard@xceptor.com