

YOUR PRACTICE, CONNECTED

Advium WorkSorted Connector

Your advice workspace.
Your practice CRM. Connected.



ADVICE WORKSPACE

**WORK
SORTED**

PRACTICE CRM

CLIENT RECORDS / JOBS / MEETING NOTES / DOCUMENTS

FROM CONVERSATION TO FOLLOW-THROUGH

Keep the context. Carry the work forward.

YOUR GUIDE TO THE CONNECTION

Two platforms. One client journey.

01

Keep the context

Bring client information, jobs and service dates into the advice conversation.

02

Carry the work forward

Publish a reviewed meeting file note to the WorkSorted job where your team needs it.

03

Make it fit your firm

Choose the features your team can use, with clear review before changes are sent.

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ABOUT THIS GUIDE

The enhanced workspace is a pilot. Confirm availability and enabled capabilities with Advium before your firm rolls it out.

A connected client experience

One client conversation. A clearer path to the next step.

Advium brings conversations, client information and advice work together. The WorkSorted connector links that work to your firm's existing client records and jobs. Your team can review information in context, then choose what to send.

THE CLIENT AT THE CENTRE



Advium

Advice workspace



Review

Choose what to send



WorkSorted

Practice CRM

01

Start with the client

Import authorised WorkSorted clients into Advium, link an existing Advium client to the matching record, or review and create a new individual record.

02

See the next step

Open the WorkSorted area within the client profile for jobs, checklist progress, service dates and activity. Available areas follow your firm's choices.

03

Keep control of changes

Review the destination and content before sending. Selected updates go from Advium to WorkSorted; reading current information does not overwrite Advium records.

GOOD TO KNOW

A connected workflow, with deliberate updates. This is not an always-on, two-way record synchronisation service.

02 / THE CONNECTOR

Clients and information

Connect the right record. Send only the details you have reviewed.

The connector uses your confirmed adviser mapping to find WorkSorted records assigned to you. A saved client link keeps future jobs and notes directed to the intended record.

A CLEAR RECORD CONNECTION



Find

Authorised records



Compare

Confirm the match



Link

Save the destination

01

Find, compare and link

Search authorised WorkSorted clients and compare identity details before confirming a match. Advium households and WorkSorted individual or entity records remain distinct.

02

Create an individual

Where no record exists, review the household's primary person before creating an individual in WorkSorted. Firm mappings help align client statuses and segments.

03

Update selected information

Compare supported personal and contact fields, or financial summary fields such as income, expenses, home loans, principal residence and cash or investment accounts. Choose the fields to send; unrecorded values remain unknown.

GOOD TO KNOW

Financial summaries are selected field updates. They do not transfer the entire financial model, every asset or all household members. Changes in WorkSorted are checked again before an update.

03 / THE CONNECTOR

Jobs, tasks and follow-ups

Turn the next step into work your team can see.

View open jobs for the linked WorkSorted client, see due and follow-up dates, and check the progress of each job's checklist. Open a focused review when a change is needed.

FROM NEXT STEP TO FOLLOW-THROUGH



Create

A job with context



Progress

Dates and checklists



Complete

Review and archive

01

Create a job with context

Create a job alongside its initial note. Choose supported job types, titles, priorities, owners, team assignments and dates. Additional options include recurrence and sharing with authorised clients.

02

Move work forward

Change due and follow-up times and update checklist statuses. Read earlier job notes for context before adding your own.

03

Close the loop

Review checklist status and the effect on review dates before archiving a job. The confirmation step makes the intended outcome visible before submission.

GOOD TO KNOW

Firm choices separate viewing jobs from managing them. Optional five-minute refresh applies only while the relevant screen is visible and never sends updates.

Meeting notes, filed properly

The meeting is finished. Put the file note where your team needs it.

Open a saved meeting file note in Advium, review the text and included action items, then choose an existing WorkSorted job or create a new one. Confirm the destination and publication before sending.

FROM CONVERSATION TO JOB HISTORY



Prepare

Saved meeting note



Review

Text, job and files



Publish

Confirm and check

01

Prepare and review

Use the saved meeting summary as the source. Edit the publication text, give the note a clear summary and review any meeting actions included with it.

02

Save your place

Keep a draft in Advium before publishing. Draft revisions and source checks help identify changes made in another window or to the saved meeting note.

03

Publish with a receipt

The note becomes part of the WorkSorted job history. Advium records the result and the destination so your team can check what was sent.

GOOD TO KNOW

If the result is unconfirmed, Advium does not automatically resend. Check the WorkSorted job and resolve the activity reminder before starting a new request.

The right documents, together

File the relevant evidence alongside the note.

Attach eligible uploaded client documents or retained issued advice to a job note. Review the selection before sending, with a total attachment limit of 10 MB per publication.

THE RIGHT FILE, IN THE RIGHT PLACE



Select

Eligible documents



Confirm

Review the note



Track

Publication receipt

01

Choose the relevant files

Eligible uploaded general documents and statements are available for selection. Identity documents are excluded from this filing workflow.

02

Use the issued version

Where supported, select the retained PDF or Word version of issued advice. Advium uses the stored issued file rather than silently generating a new version.

03

Know the outcome

Activity distinguishes confirmed, rejected, partly completed and unconfirmed operations. File receipts identify the exact documents included; recovery avoids blindly repeating a creation or publication.

GOOD TO KNOW

Attaching documents is a separate firm choice. Enabling notes alone does not grant document filing.

Service context and relationships

Keep the broader client relationship in view.

Review the service information returned by WorkSorted without leaving the client workflow. Add a relationship only after confirming both records and the relationship type.

A BROADER CLIENT VIEW



Services

Packages and fees



Dates

Reviews and terms



Relationships

Authorised records

01

Service and review dates

View supported service package details, fees, start and end dates, review dates and ongoing agreement information returned by WorkSorted.

02

Connect related records

Choose from WorkSorted's relationship types and add a relationship between records authorised for your mapped adviser account. Review the two people or entities before confirming.

03

Refresh when useful

Refresh current information on demand. Your firm can also offer a visible-screen refresh option for jobs and services, without automatic personal or financial updates.

GOOD TO KNOW

Relationship creation is available for authorised records. Continue to use WorkSorted to browse the complete relationship network.

Your firm decides

Make the connector work the way your firm does.

A firm administrator chooses which features the enhanced workspace makes available. These settings are separate from the permissions granted to an external AI assistant.

YOUR FIRM, YOUR CHOICES



Workspace

Features in Advium



Adviser

Mapped access



AI assistants

Separate permissions

01

In Advium

Choose jobs, job updates, notes, document filing, client creation, personal details, financial information, service dates and relationships. Dependent features enable the access they need, and choices are saved explicitly.

02

AI assistant permissions

Separately control adding job notes, creating jobs, changing follow-ups, updating checklists and attaching documents through the assistant integration. Enabling an app feature does not automatically grant assistant access.

03

Access follows the adviser

A firm connection is only the first step. Confirmed team mapping, local client ownership and the linked WorkSorted record determine access. New workspace choices default to off.

GOOD TO KNOW

Changes are checked by the server. Disconnecting clears the connection's mappings and choices, which must be reviewed again when reconnecting.

From connection to first note

A short setup journey, with a clear first outcome.

Start with your administrator, then complete a small end-to-end workflow with your team before broadening the rollout.

YOUR FIRST CONNECTED WORKFLOW



Connect

Firm and team



Choose

Features and client



Publish

Review your first note

01

Connect your firm

In Advium Connectors, open WorkSorted and authorise the intended WorkSorted company. Confirm the connection shown in setup.

02

Confirm your team and choices

Review suggested adviser matches and save the mapping. Choose the features available in Advium, then separately review any AI assistant permissions.

03

Link, review and publish

Open a client profile, find the matching WorkSorted record and confirm the link. Review a job, prepare a file note and confirm publication. Check the resulting activity receipt.

GOOD TO KNOW

A missing adviser mapping is a setup step, not a request to recreate your client. Your firm administrator must save the match before the connector can use it.

LET'S MAKE IT WORK FOR YOUR FIRM

Your next step, connected.

Is the enhanced workspace available to every firm?

The enhanced client workspace is a pilot. Ask Advium to confirm availability and the capabilities enabled for your firm before rollout.

Will it replace WorkSorted?

No. WorkSorted remains the destination for its client records and jobs. Advium brings relevant information and reviewed actions into the advice workflow.

Does it synchronise everything automatically?

No. Reads and selected, adviser-confirmed updates have different purposes. Personal and financial information is not continuously overwritten between the two systems.

Can we publish a meeting file note to a job?

Yes, in the enhanced workspace. Review the saved Advium meeting note, select an existing job or create one with a note, and confirm publication.

Can each firm choose its features?

Yes. The administrator manages workspace choices separately from connected AI assistant permissions. Availability also depends on the firm's enabled features and the WorkSorted connection.

SEE YOUR WORKFLOW IN ADVIUM

Let's walk through it together.

advium.ai/book-demo