How to use the Selectapension Integration with Intelligent Office

Email: sales@selectapension.com Tel: 01892 669494

Introduction

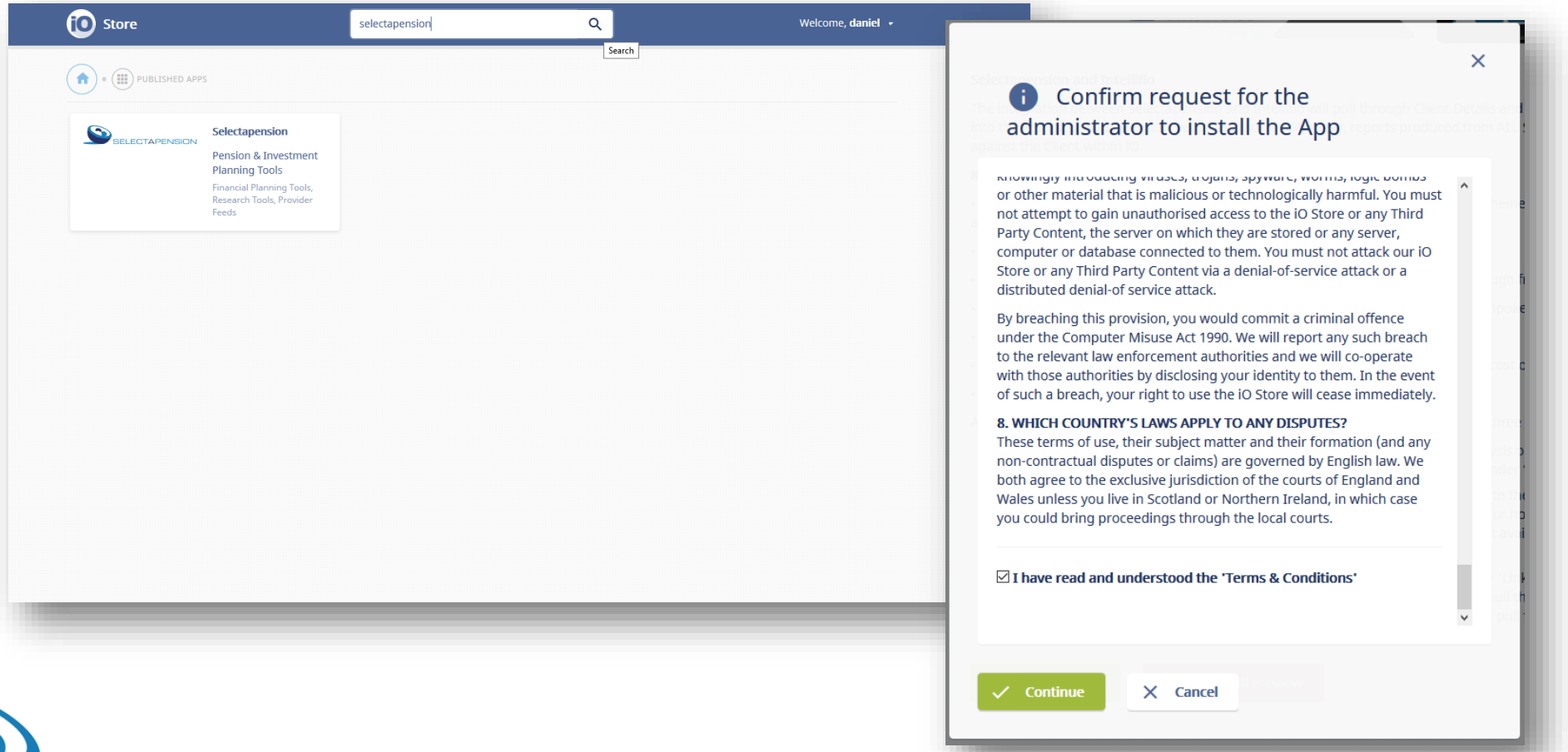
This quick guide will explain how to use the 2-way integration between iO and Selectapension.

Although the integration is between Selectapension's Pension Switching tool, you are able to upload any report across all modules back on to the client file within iO.

So, if you have created a defined benefit report or an income drawdown analysis, these reports can seamlessly upload back to iO by simply selecting a tick box within the '**Print Options**'.

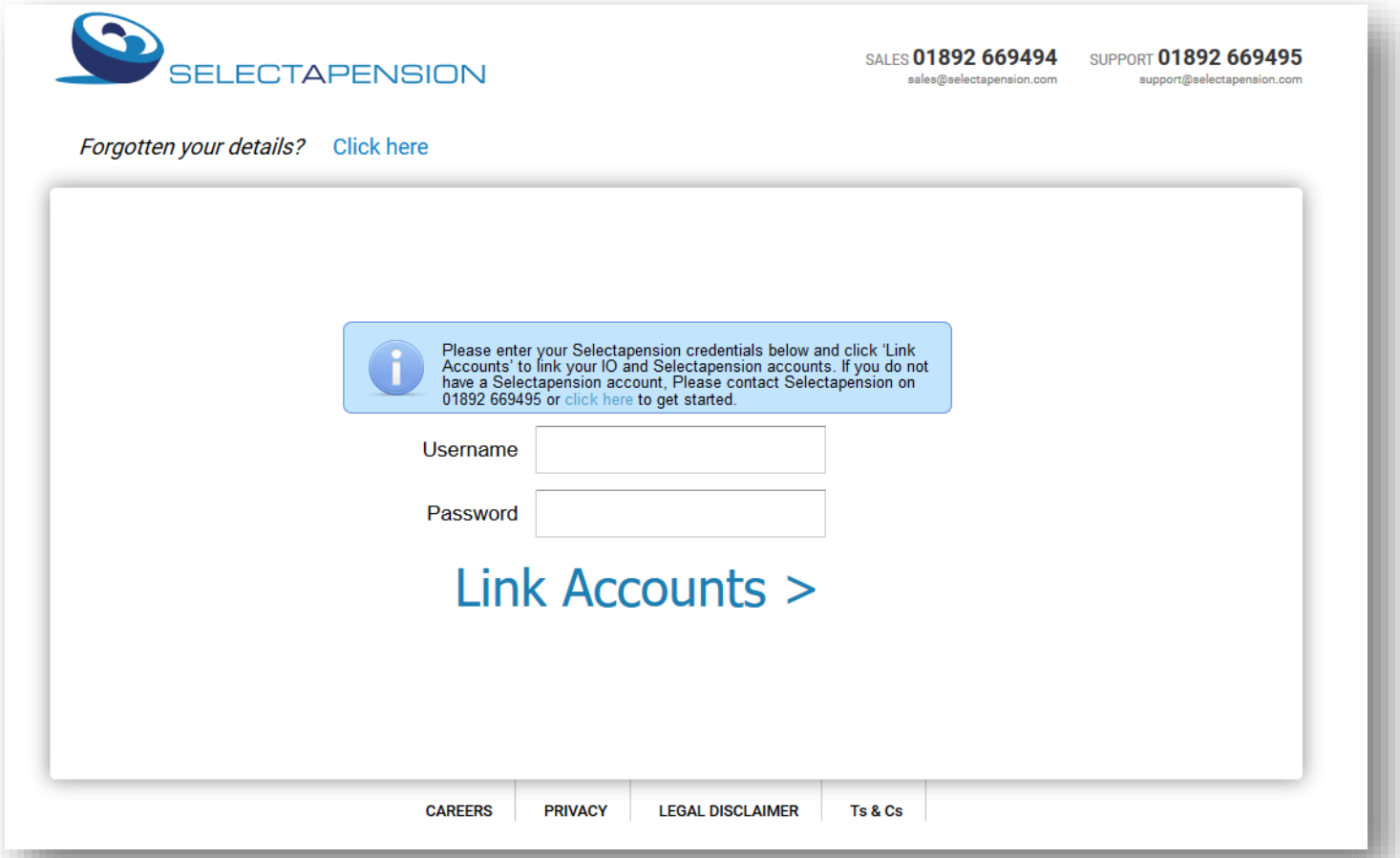
Installing the App

Browse or search for ‘Selectapension’ within the iO store.
Read through the information and click on ‘**Install**’ at the bottom of the page.
Confirm the Ts & Cs by selecting the tick box, then select ‘**Continue**’.



Installing the App

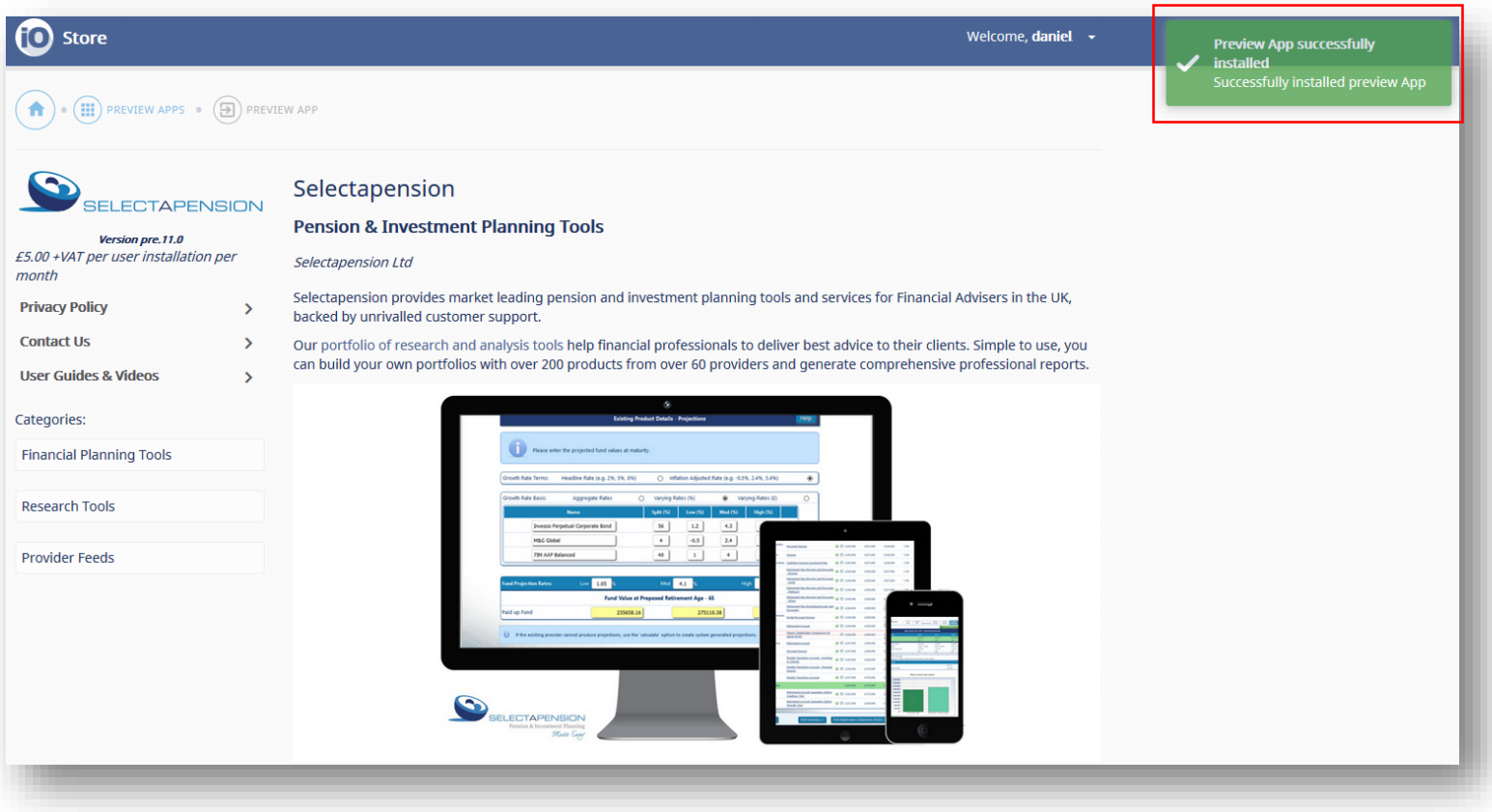
After confirming the Ts & Cs, you will be directed to the '**Link Accounts**' page.
Enter your current Selectapension credentials and click on '**Link Accounts**'.



Installing the App

After linking your accounts, you will see a confirmation badge at the top right of your screen confirming the APP is installed. Selectapension will now be available to use within iO.

NB: When navigating to Selectapension for the first time after installation, you will be prompted with a consent page to move data between the two sites.



Using the App

Now you have successfully installed and linked your accounts, you can use the integration in 3 ways;

1. Through the '**Client Actions**' drop down within the client details dashboard in iO.

2. By adding a '**Widget**' within iO so the Selectapension logo appears on your '**Dashboard**'.

3. By uploading reports from Selectapension to iO.

Private and Confidential 2018

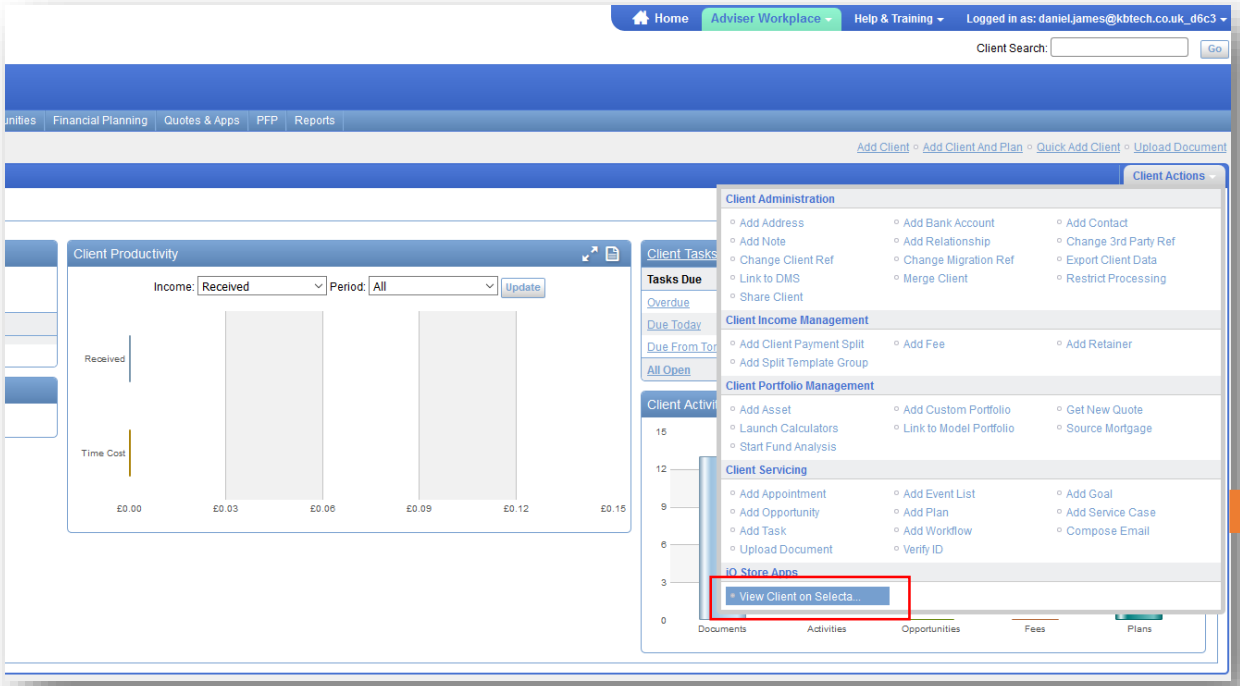
Using the App

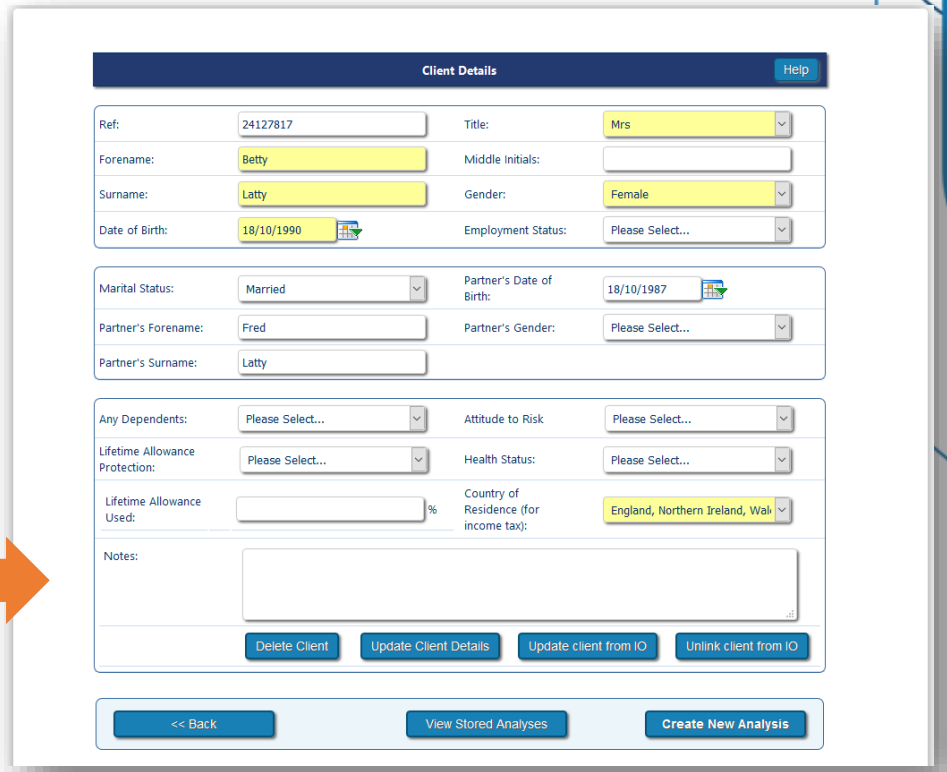
Using Selectapension through Client Actions within iO.

Select the client within iO and hover over '**Client Actions**' at the right of the Dashboard. Move your cursor down to '**View Client on Selectapension**'.

Once you have confirmed the client to use, the data will automatically pull through on to '**Client Details**' within Selectapension.

NB: If the client already exists on Selectapension, the data will not pull through.



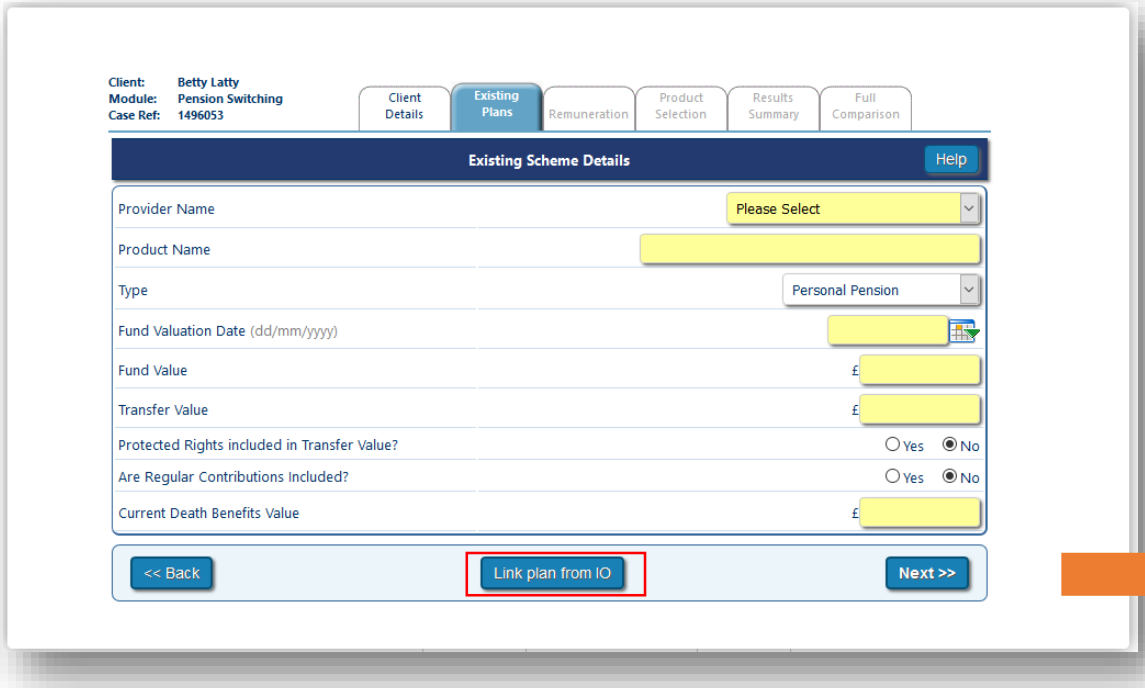


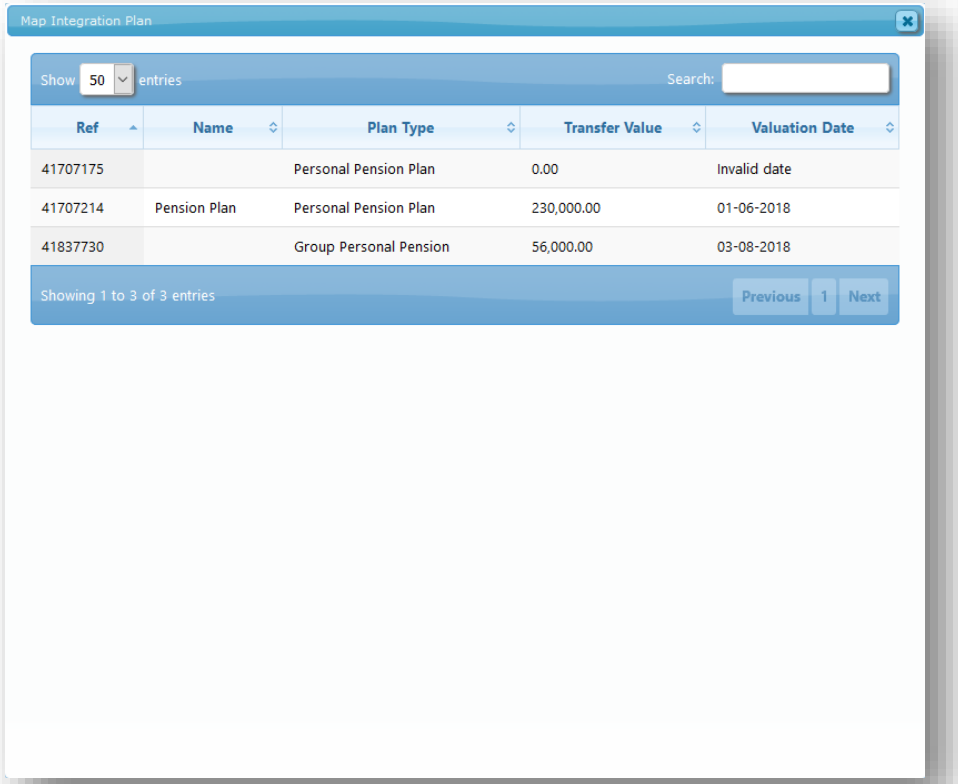
Using the App

Using Selectapension through Client Actions within iO.

Select '**Create New Analysis**' and continue your journey through the '**Pension Switching**' module.

When you come to add the ceding scheme information to Selectapension, a new button will appear **'Link Plan from iO'**. Selecting this will bring up a list of existing holdings linked to the client. Simply select the plan for analysis and the system will pull this through to the '**Existing Scheme Details**' page.



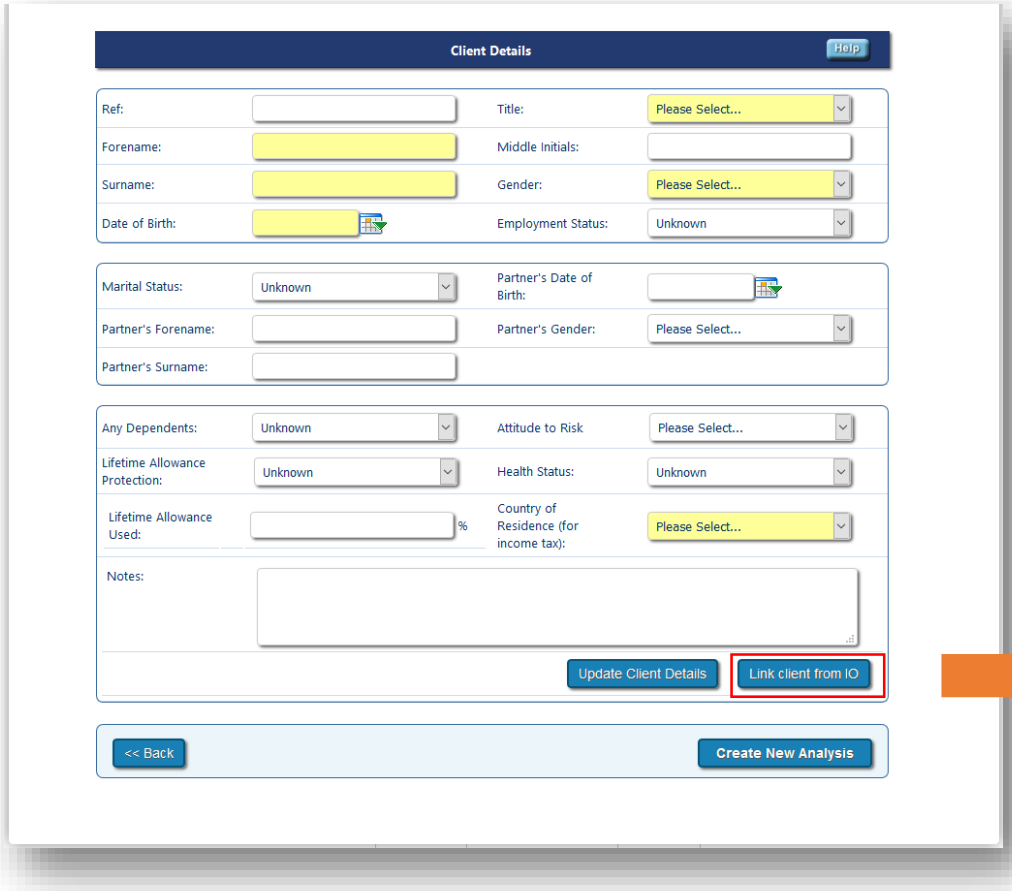


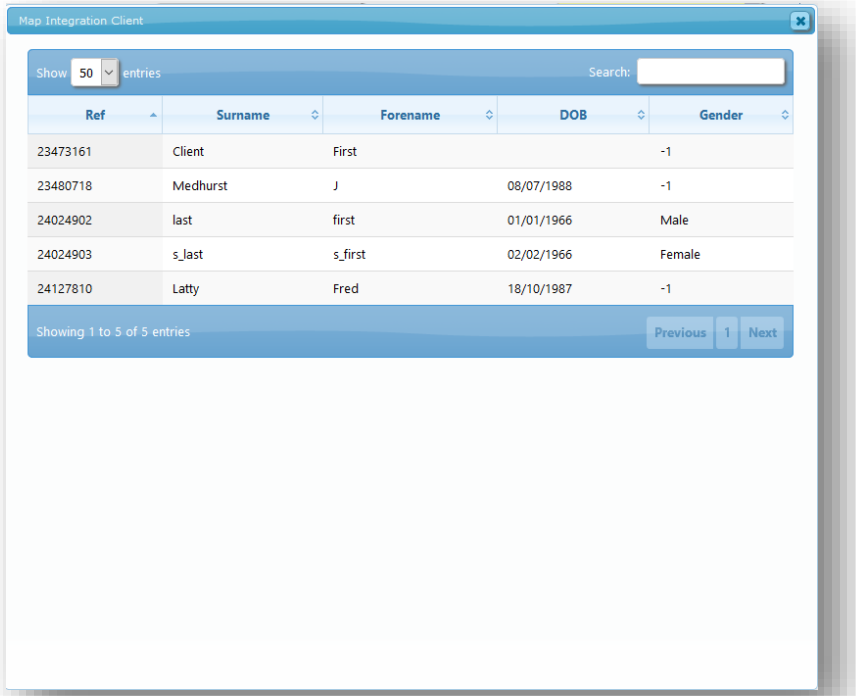
Using the App

Pulling a client through from iO within Selectapension.

Select '**New Client**' and you will notice a button '**Link Client from iO**'. This will bring up a list of all your clients on iO.

Select the client in question and the information will pull through to the '**Client Details**' page.





Using the App

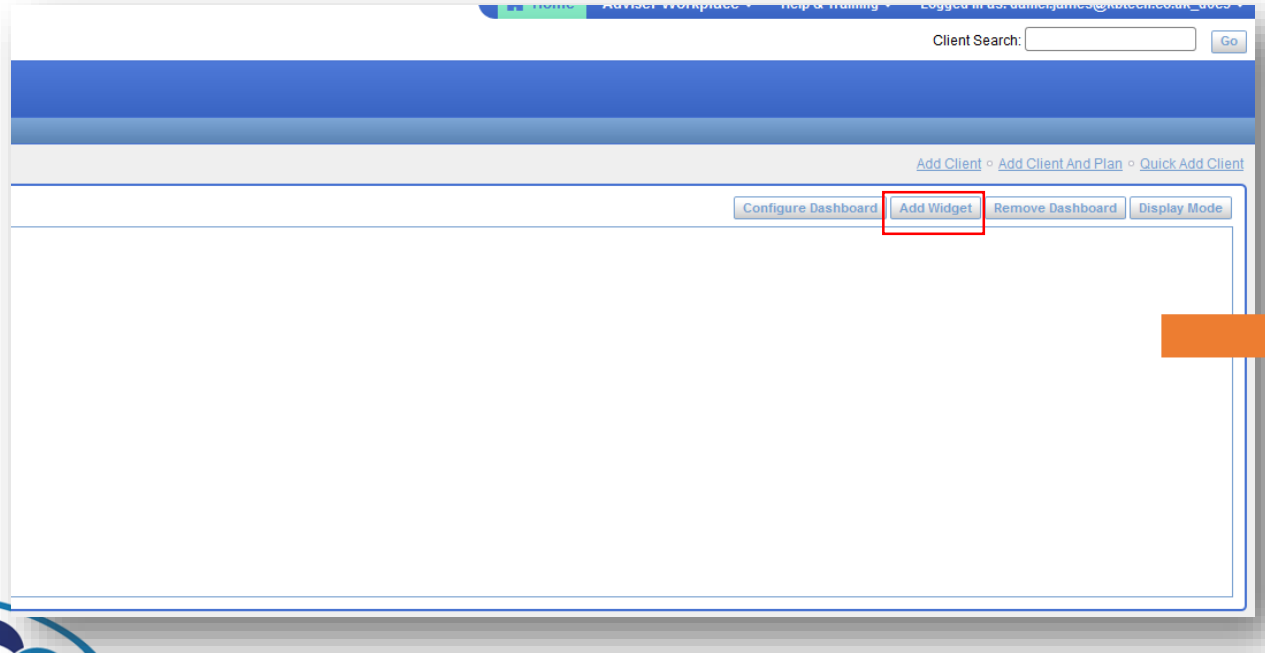
Adding Selectapension as a Widget to your iO dashboard.

Once you have installed the APP, you can create a shortcut to Selectapension by adding a '**Widget**' to your dashboard.

Within the home screen of iO, click on '**Edit Mode**' to the right of the dashboard.

Select '**Add Widget**' and scroll down until you see '**Selectapension Login**'

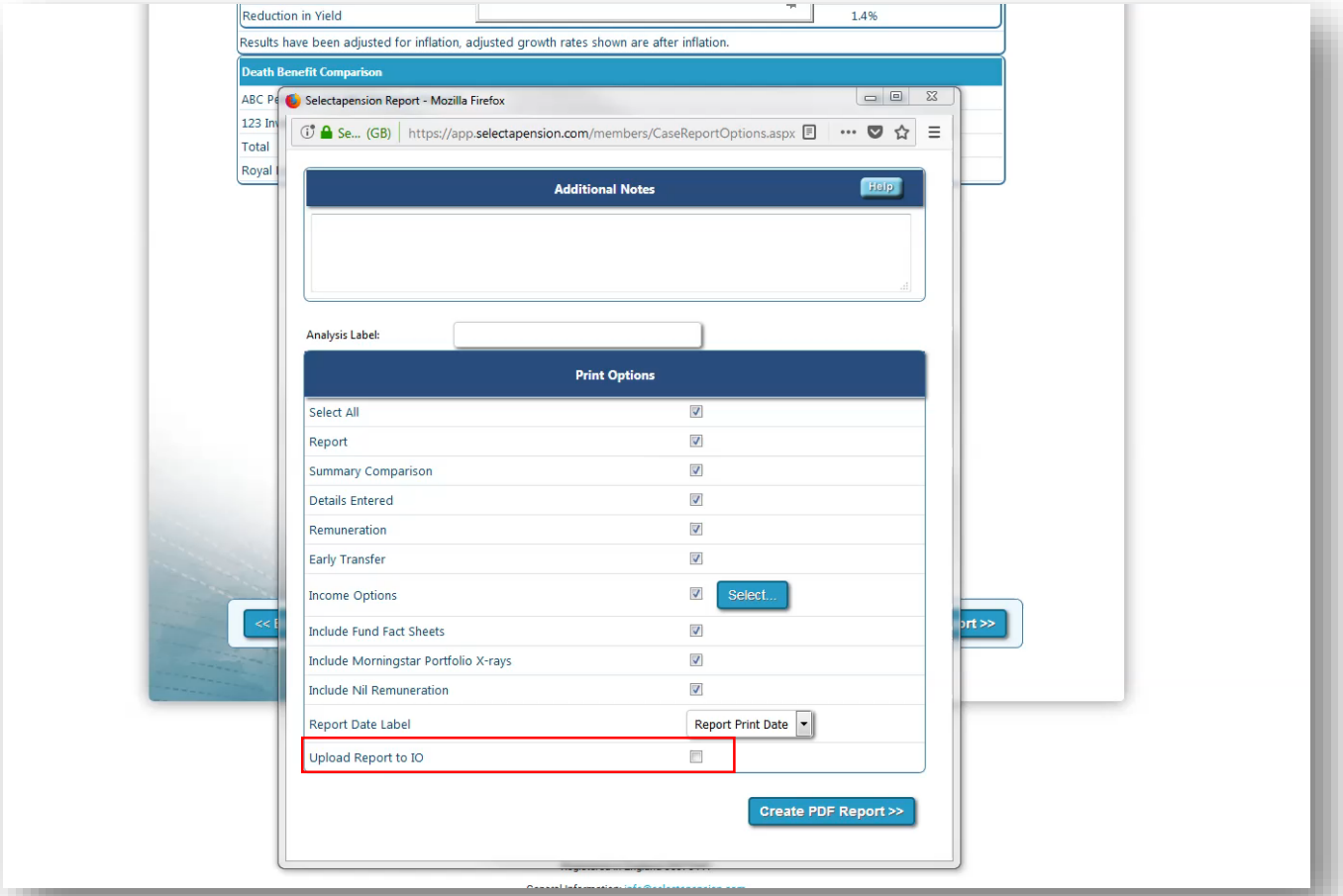
Click '**Add**' and this will then add the logo to your dashboard, allowing you to jump straight into log in.



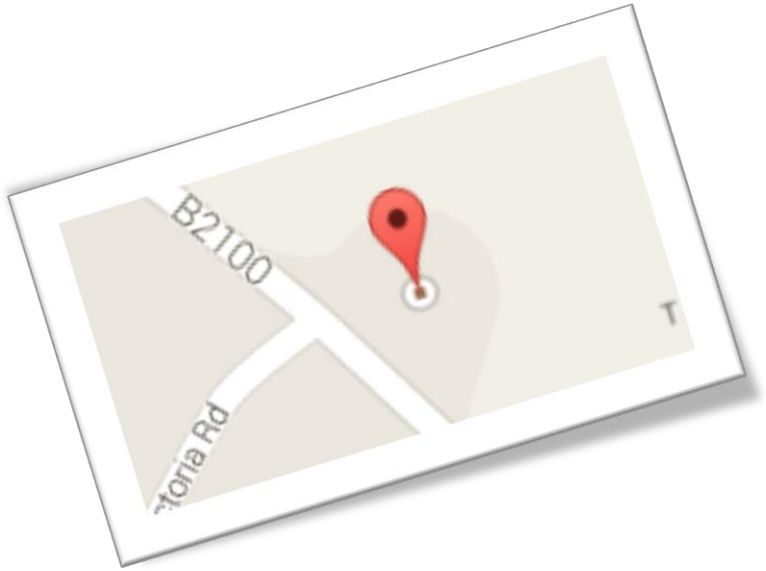
Using the App

Uploading reports from Selectapension modules to iO.

At the end of all modules you will be greeted with a pop up '**Print Options**'. A tick box appears at the bottom '**Upload Report to iO**'. Ticking this will upload the PDF report to the client file on iO automatically.



Contact



01892 669494

sales@selectapension.com

www. selectapension.com

Selectapension Ltd | Selectapension House | Eridge Road | Crowborough | East Sussex | TN6 2SL

Private and Confidential 2018