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## How to use the Selectapension Integration with Intelligent Office

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# 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**'.

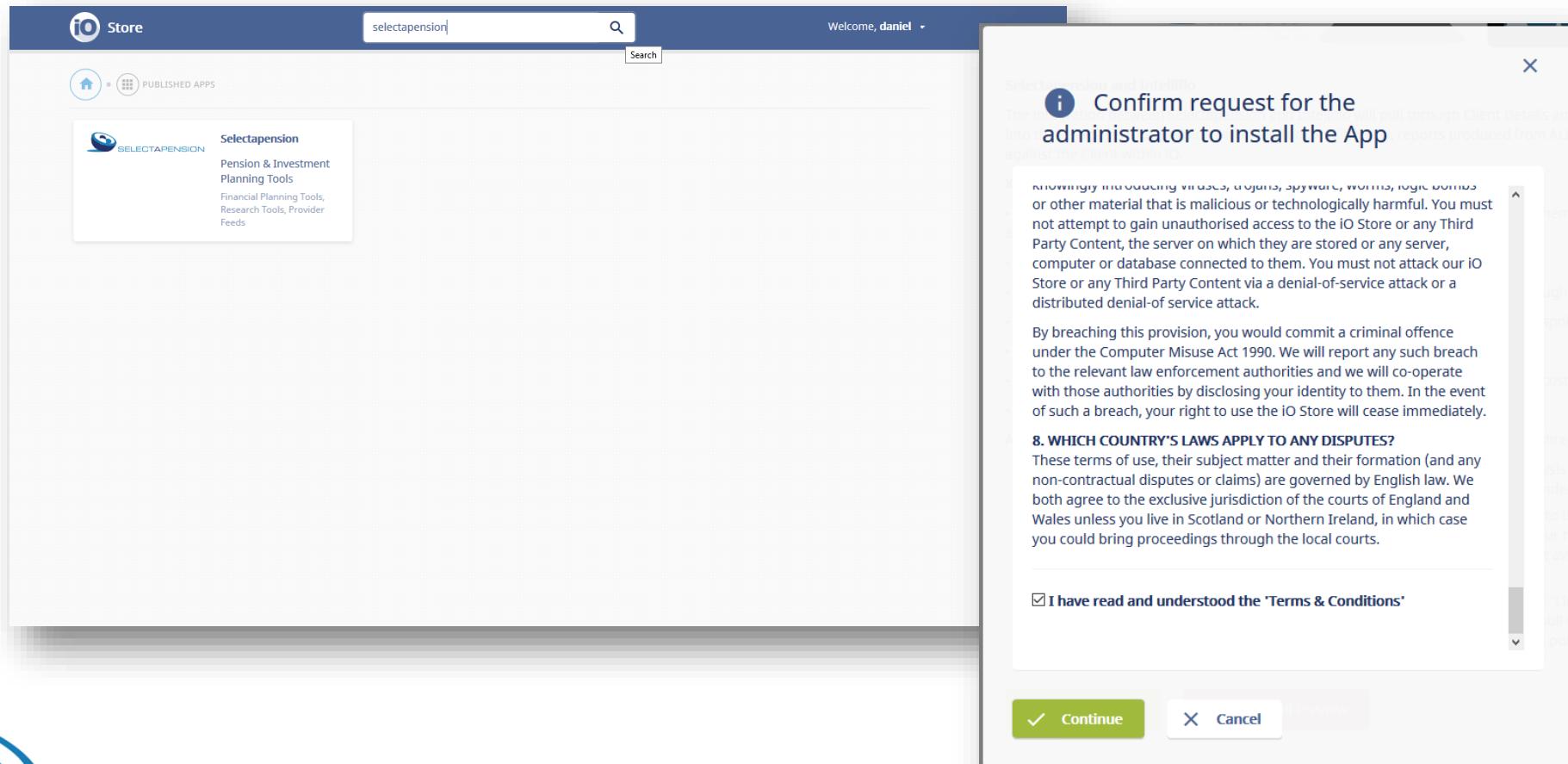


# Installing the App

Browse or search for 'Selectapension' within the iO store.

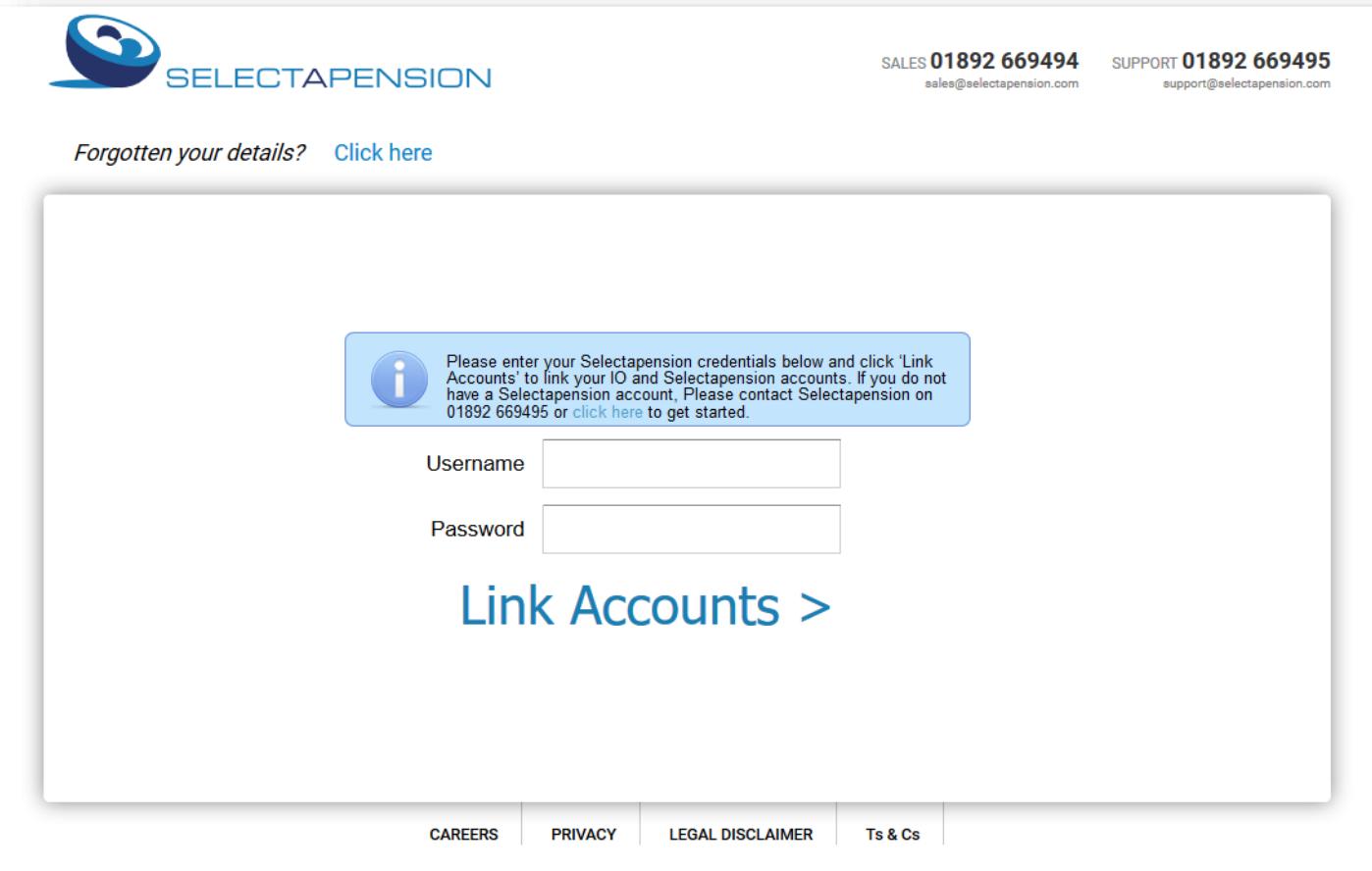
Read through the information and click on '**Install**' at the bottom of the page.

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'.

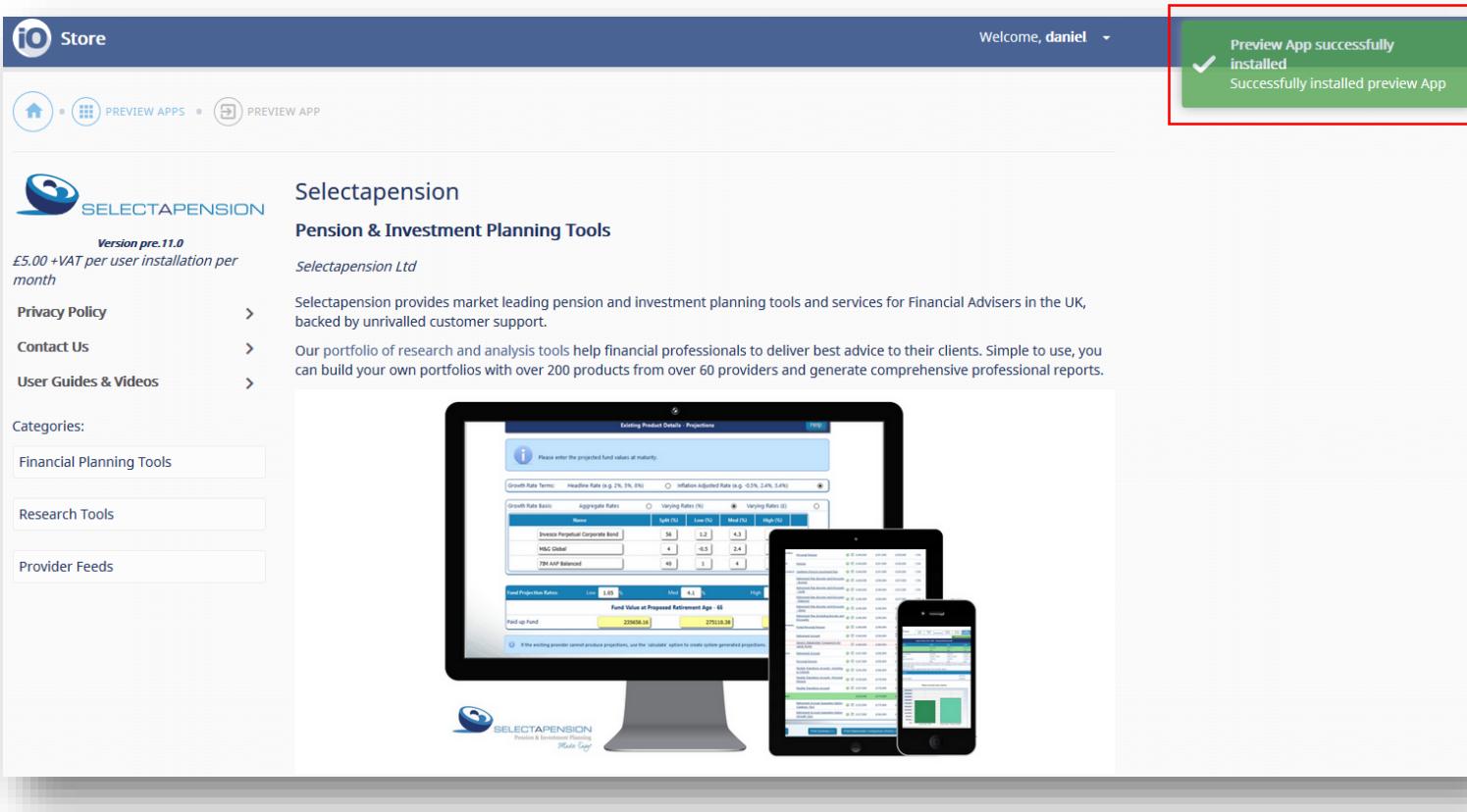


The screenshot shows the 'Link Accounts' page of the Selectapension website. At the top, the Selectapension logo is on the left, followed by 'SELECTAPENSION' in blue. To the right are 'SALES 01892 669494' with an email link, and 'SUPPORT 01892 669495' with an email link. Below this, a message says 'Forgotten your details? [Click here](#)'. A large central box contains an information icon and a message: 'Please enter your Selectapension credentials below and click 'Link Accounts' to link your IO and Selectapension accounts. If you do not have a Selectapension account, Please contact Selectapension on 01892 669495 or [click here](#) to get started.' Below the message are 'Username' and 'Password' input fields. At the bottom, a large blue button says 'Link Accounts >'. At the very bottom of the page, there are links for 'CAREERS', 'PRIVACY', 'LEGAL DISCLAIMER', and 'Ts & Cs'.

# 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.



The screenshot shows the iO Store interface. At the top, there is a navigation bar with 'io Store' on the left, 'Welcome, daniel' in the center, and a red-bordered message box on the right containing the text 'Preview App successfully installed' and 'Successfully installed preview App'. Below the navigation bar, the page title is 'Selectapension' with the subtitle 'Pension & Investment Planning Tools'. The developer is listed as 'Selectapension Ltd'. To the left, there is a sidebar with links for 'Privacy Policy', 'Contact Us', 'User Guides & Videos', and 'Categories' (which includes 'Financial Planning Tools', 'Research Tools', and 'Provider Feeds'). In the center, there is a large image showing a desktop monitor, a tablet, and a smartphone displaying the Selectapension app interface. The app interface shows various pension and investment planning tools and data.

# 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.



# 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.

The image shows two screenshots illustrating the integration between iO and Selectapension.

**iO Adviser Workplace Dashboard:** The left screenshot shows the iO dashboard with various modules like Client Productivity, Client Tasks, and Client Activities. The 'Client Actions' menu is open, displaying a list of actions. The 'View Client on Selectapension' option is highlighted with a red box and an orange arrow pointing to the right.

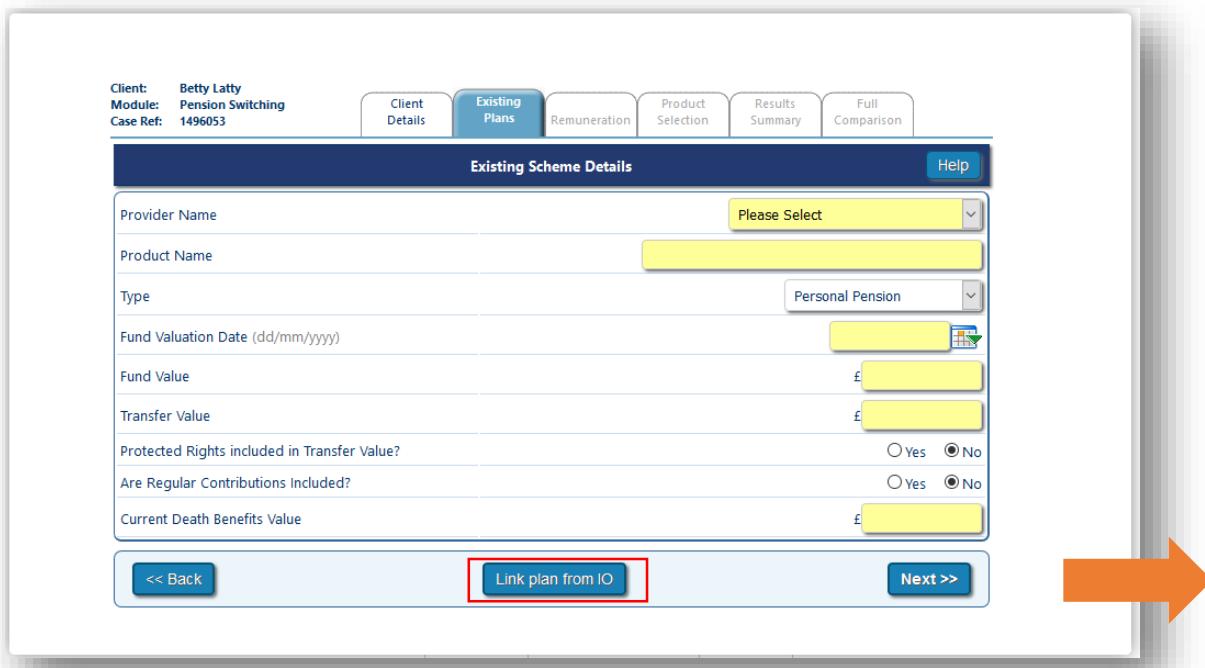
**Selectapension Client Details:** The right screenshot shows the 'Client Details' page in Selectapension. It displays client information such as Ref: 24127817, Forename: Betty, Surname: Latty, Date of Birth: 18/10/1990, and Marital Status: Married. The 'Client Actions' menu is also visible at the bottom of this page.

# 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.



Client: Betty Latty  
Module: Pension Switching  
Case Ref: 1496053

Client Details Existing Plans Remuneration Product Selection Results Summary Full Comparison

**Existing Scheme Details**

Provider Name: Please Select

Product Name:

Type: Personal Pension

Fund Valuation Date (dd/mm/yyyy):

Fund Value: £

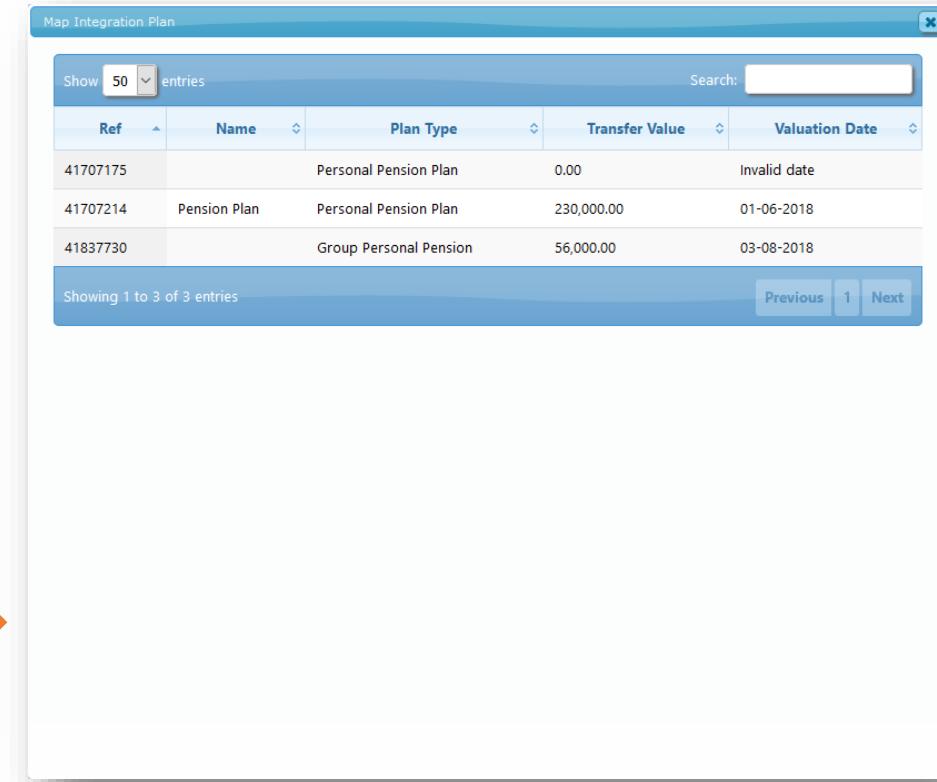
Transfer Value: £

Protected Rights included in Transfer Value?  Yes  No

Are Regular Contributions Included?  Yes  No

Current Death Benefits Value: £

<< Back Link plan from IO Next >>



Map Integration Plan

Show 50 entries Search:

Ref	Name	Plan Type	Transfer Value	Valuation Date
41707175		Personal Pension Plan	0.00	Invalid date
41707214	Pension Plan	Personal Pension Plan	230,000.00	01-06-2018
41837730		Group Personal Pension	56,000.00	03-08-2018

Showing 1 to 3 of 3 entries Previous 1 Next

# 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.

The diagram illustrates the process of linking a client from iO. On the left, the 'Client Details' page is shown with various input fields for client information. A red box highlights the 'Link client from iO' button. An orange arrow points from this button to the right, leading to a list of clients titled 'Map Integration Client'. The list includes columns for Ref, Surname, Forename, DOB, and Gender. The data is as follows:

Ref	Surname	Forename	DOB	Gender
23473161	Client	First	-1	
23480718	Medhurst	J	08/07/1988	-1
24024902	last	first	01/01/1966	Male
24024903	s_last	s_first	02/02/1966	Female
24127810	Latty	Fred	18/10/1987	-1

# Using the App

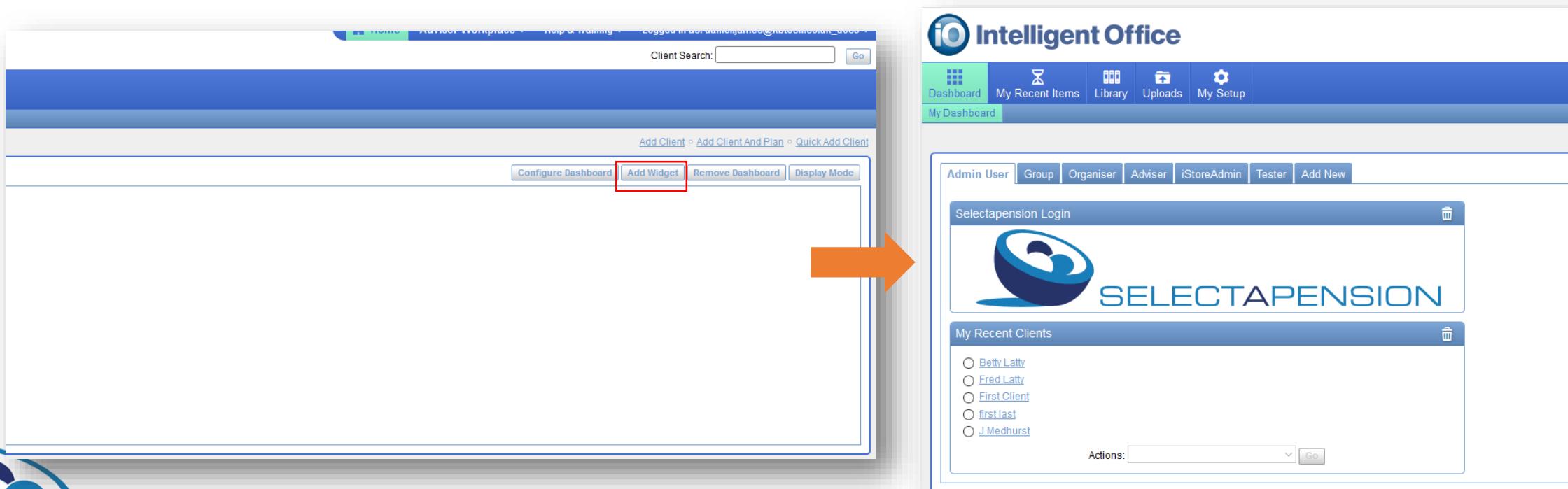
## Adding Selectapension as a Widget to your iO dashboard.

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**'

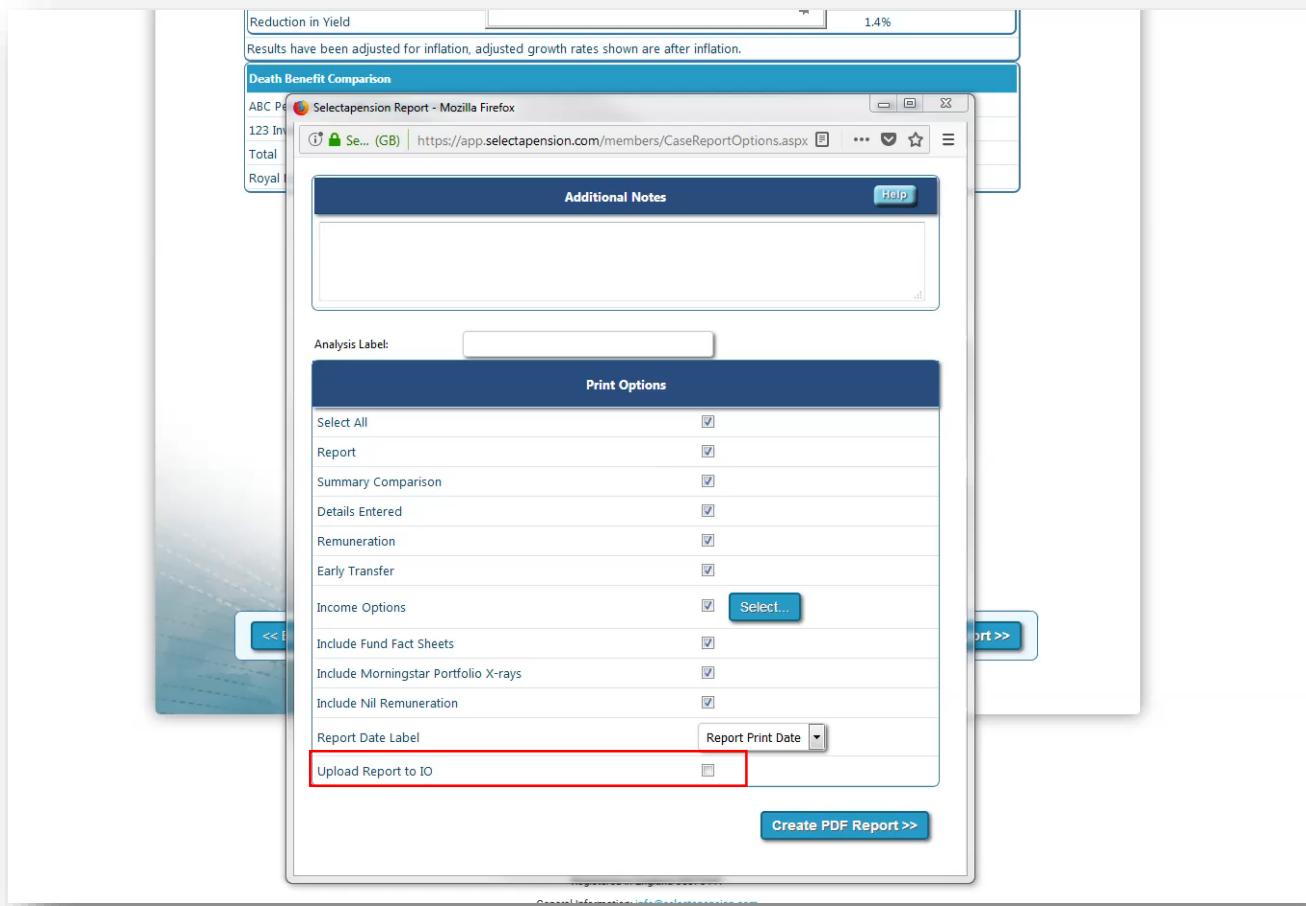
Click '**Add**' and this will then add the logo to your dashboard, allowing you to jump straight into log in.



# 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



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