



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.

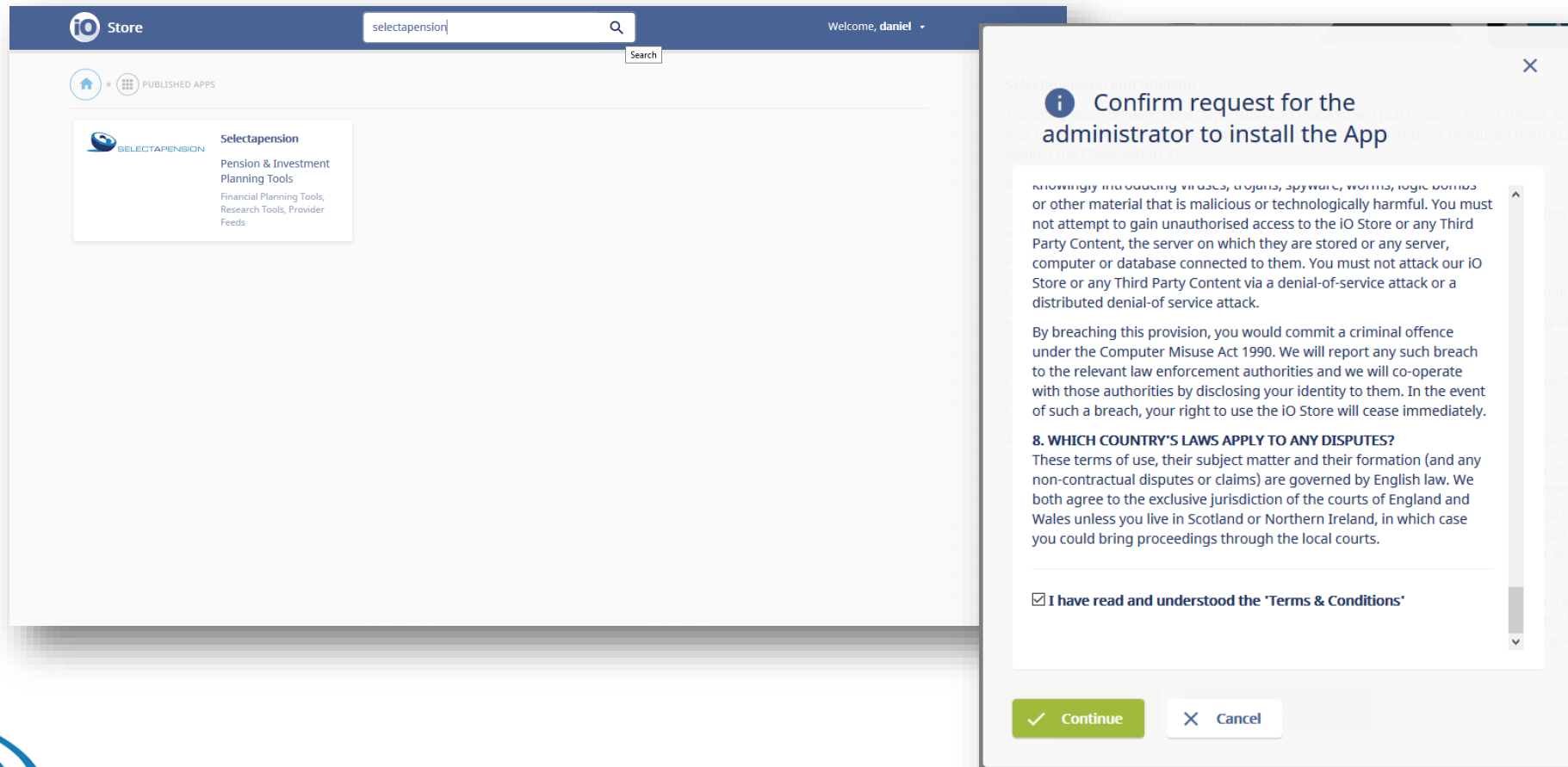
Although the integration is between Selectapension's Pension Switching tool, you are able to upload any report across all modules back on to the client file within iO.

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**'.



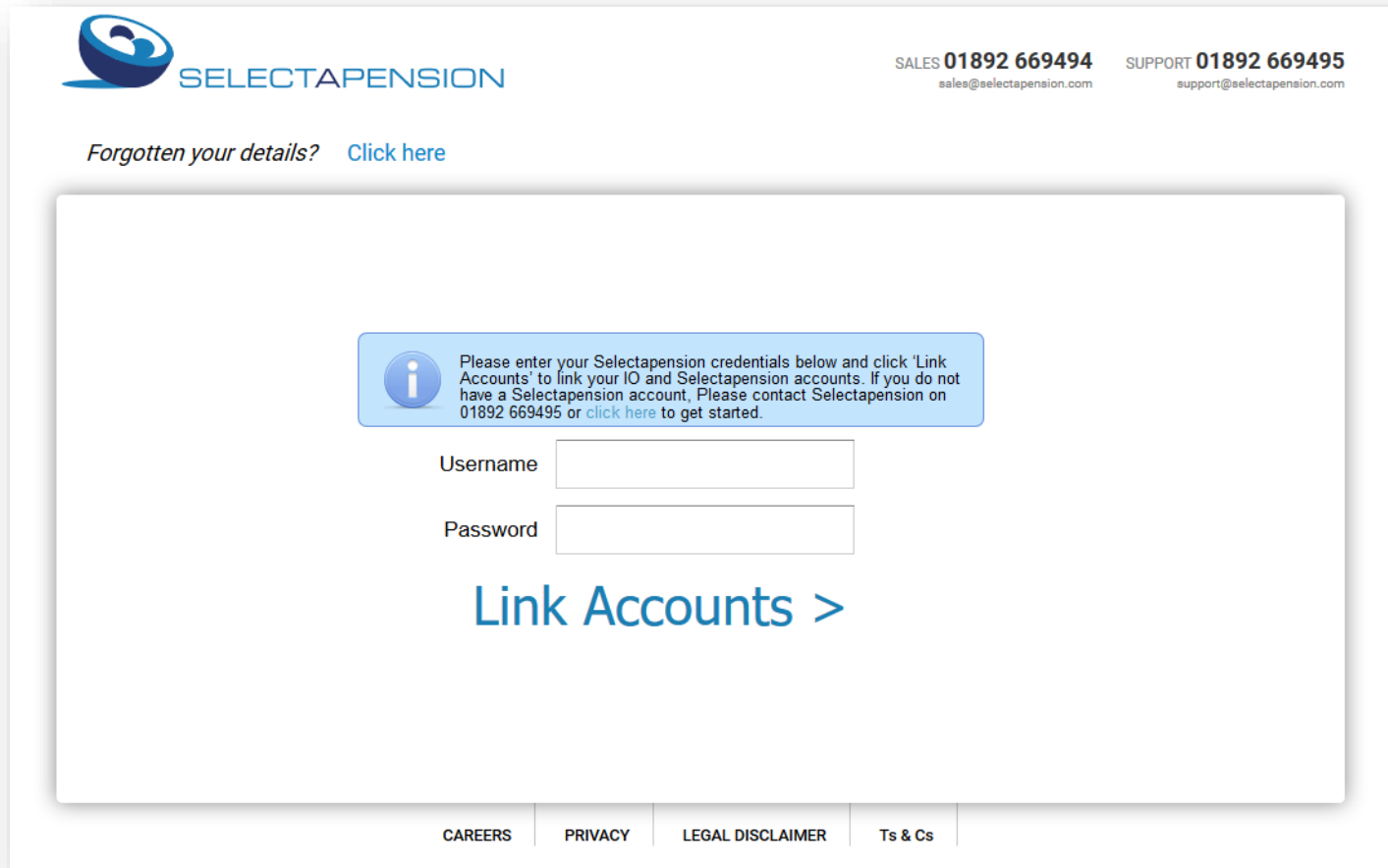
Installing the App


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**'.




 **SELECTAPENSION**

SALES **01892 669494**
sales@selectapension.com

SUPPORT **01892 669495**
support@selectapension.com

Forgotten your details? [Click here](#)

 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.

Username

Password

Link Accounts >

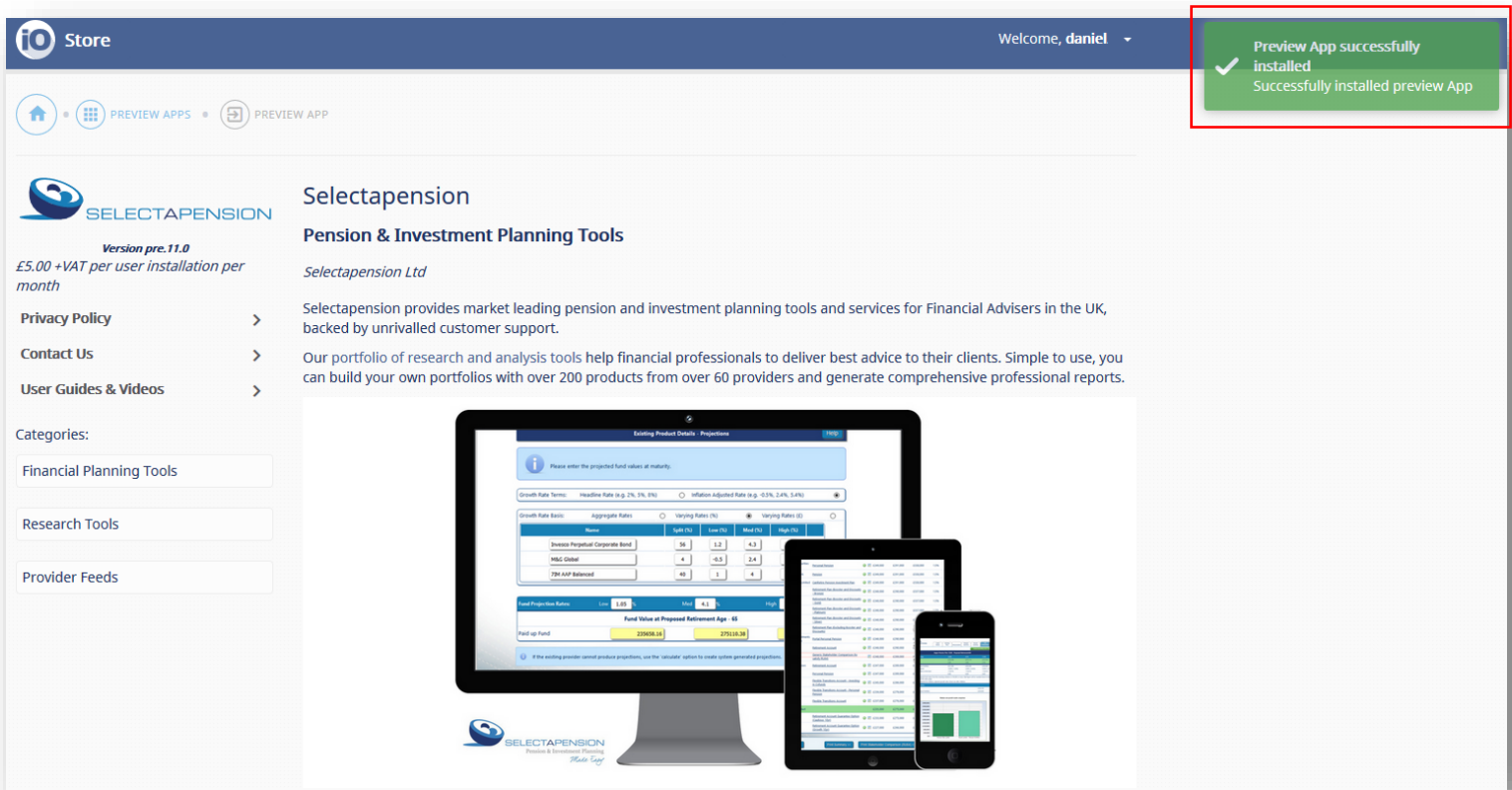
CAREERS | PRIVACY | LEGAL DISCLAIMER | Ts & Cs



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.



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 screenshot shows the iO dashboard interface. At the top, there's a navigation bar with 'Home', 'Adviser Workplace', 'Help & Training', and a user login 'Logged in as: daniel.james@kbtech.co.uk_d6c3'. Below this is a 'Client Search' field. The main area is divided into 'Client Productivity' on the left, which includes a bar chart for 'Income: Received' and 'Time Cost', and a 'Client Actions' menu on the right. The 'Client Actions' menu is expanded, showing categories like 'Client Administration', 'Client Income Management', 'Client Portfolio Management', 'Client Servicing', and 'IO Store Apps'. The 'IO Store Apps' section at the bottom has a red box highlighting the 'View Client on Selecta...' option.

The screenshot shows the 'Client Details' form in Selectapension. The form is titled 'Client Details' and has a 'Help' button. It contains several fields for client information: 'Ref:' (24127817), 'Title:' (Mrs), 'Forename:' (Betty), 'Middle Initials:' (empty), 'Surname:' (Latty), 'Gender:' (Female), 'Date of Birth:' (18/10/1990), 'Employment Status:' (Please Select...), 'Marital Status:' (Married), 'Partner's Date of Birth:' (18/10/1987), 'Partner's Forename:' (Fred), 'Partner's Gender:' (Please Select...), 'Partner's Surname:' (Latty), 'Any Dependents:' (Please Select...), 'Attitude to Risk:' (Please Select...), 'Lifetime Allowance Protection:' (Please Select...), 'Health Status:' (Please Select...), 'Lifetime Allowance Used:' (empty), 'Country of Residence (for income tax):' (England, Northern Ireland, Wales), and a 'Notes:' text area. At the bottom, there are buttons for 'Delete Client', 'Update Client Details', 'Update client from iO', and 'Unlink client from iO'. Below these are three buttons: '<< Back', 'View Stored Analyses', and 'Create New Analysis'.



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.

Client Details Help

Ref: Title: Please Select...

Forename: Middle Initials:

Surname: Gender: Please Select...

Date of Birth: Employment Status: Unknown

Marital Status: Unknown Partner's Date of Birth:

Partner's Forename: Partner's Gender: Please Select...

Partner's Surname:

Any Dependents: Unknown Attitude to Risk: Please Select...

Lifetime Allowance Protection: Unknown Health Status: Unknown

Lifetime Allowance Used: % Country of Residence (for income tax): Please Select...

Notes:

Update Client Details Link client from iO

<< Back Create New Analysis



Map Integration Client

Show 50 entries Search:

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

Showing 1 to 5 of 5 entries Previous 1 Next



Using the App

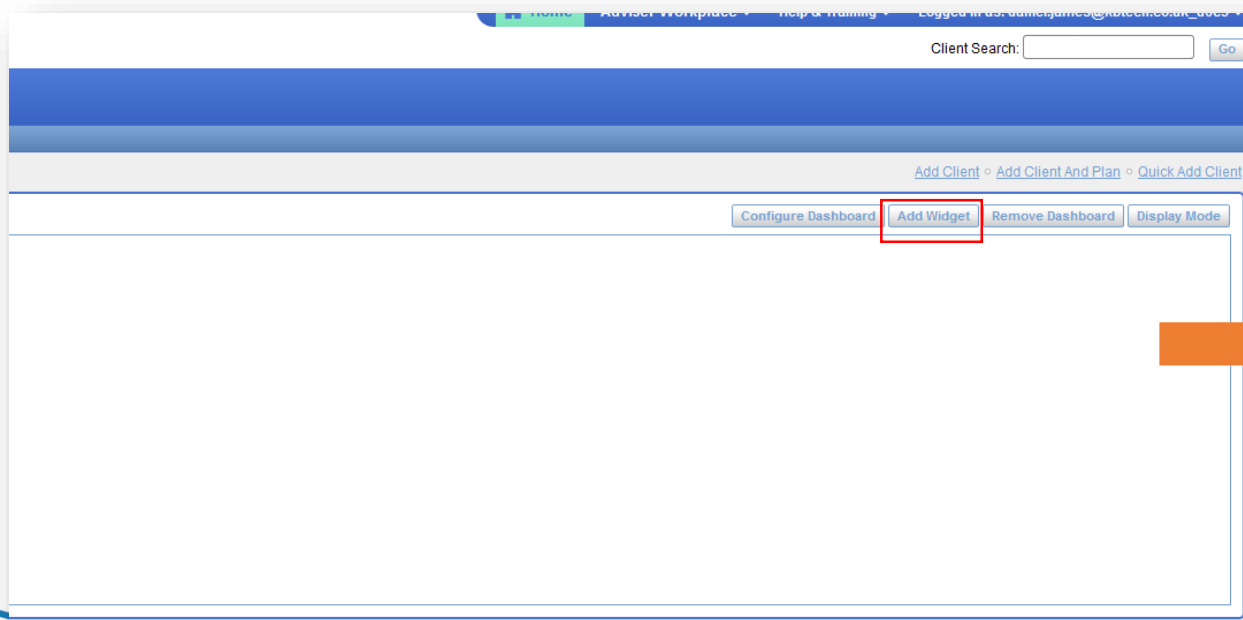
Adding Selectapension as a Widget to your iO dashboard.

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.

Reduction in Yield 1.4%

Results have been adjusted for inflation, adjusted growth rates shown are after inflation.

Death Benefit Comparison

ABC P
123 In
Total
Royal

Selectapension Report - Mozilla Firefox

Se... (GB) | https://app.selectapension.com/members/CaseReportOptions.aspx

Additional Notes

Help

Analysis Label:

Print Options

Select All	<input checked="" type="checkbox"/>
Report	<input checked="" type="checkbox"/>
Summary Comparison	<input checked="" type="checkbox"/>
Details Entered	<input checked="" type="checkbox"/>
Remuneration	<input checked="" type="checkbox"/>
Early Transfer	<input checked="" type="checkbox"/>
Income Options	<input checked="" type="checkbox"/> Select...
Include Fund Fact Sheets	<input checked="" type="checkbox"/>
Include Morningstar Portfolio X-rays	<input checked="" type="checkbox"/>
Include Nil Remuneration	<input checked="" type="checkbox"/>

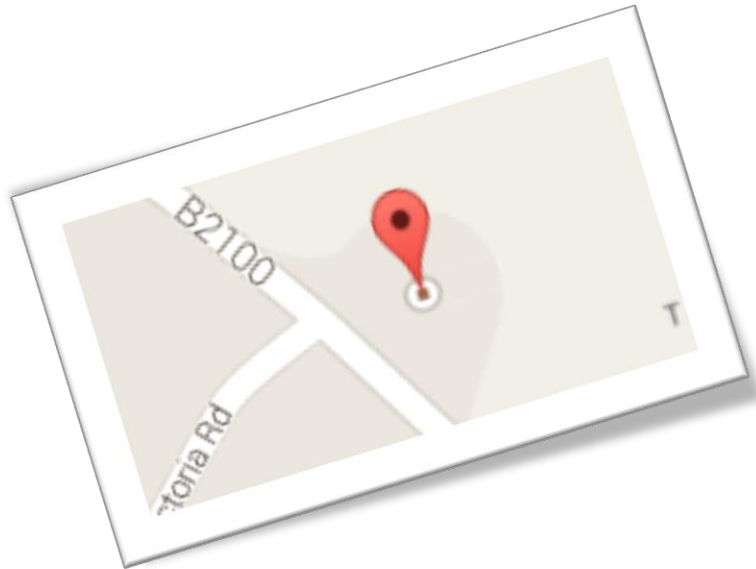
Report Date Label Report Print Date

Upload Report to iO ☐

Create PDF Report >>



Contact



01892 669494



sales@selectapension.com



www.selectapension.com

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

