Dynamic Planner integration with intelliflo office

Integrations team
October 2024

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1 Introduction

The integration between Dynamic Planner and intelliflo office has been live since 2015. It is a proven integration with over 500 firms and 1000 users using it on a regular basis. As Dynamic Planner makes further enhancements to our core system, we will work with intelliflo office to ensure that the integration continues to provide value to our mutual clients.

This guide will take you through the integration step by step starting with how to download the integration app in the intelliflo office store through to importing a client record to Dynamic Planner and sending the client reports and any income and expenditure back to intelliflo office.

From 30th August 2024, a significant upgrade was done and further functionality was added to allow users of the integration to use either of 2 options when sending data over to Dynamic Planner, then sending back data from Dynamic Planner to intelliflo office for income, expenditure and risk profiling.

The integration has been designed to work with the latest versions of Chrome, Edge and other mainstream browsers.

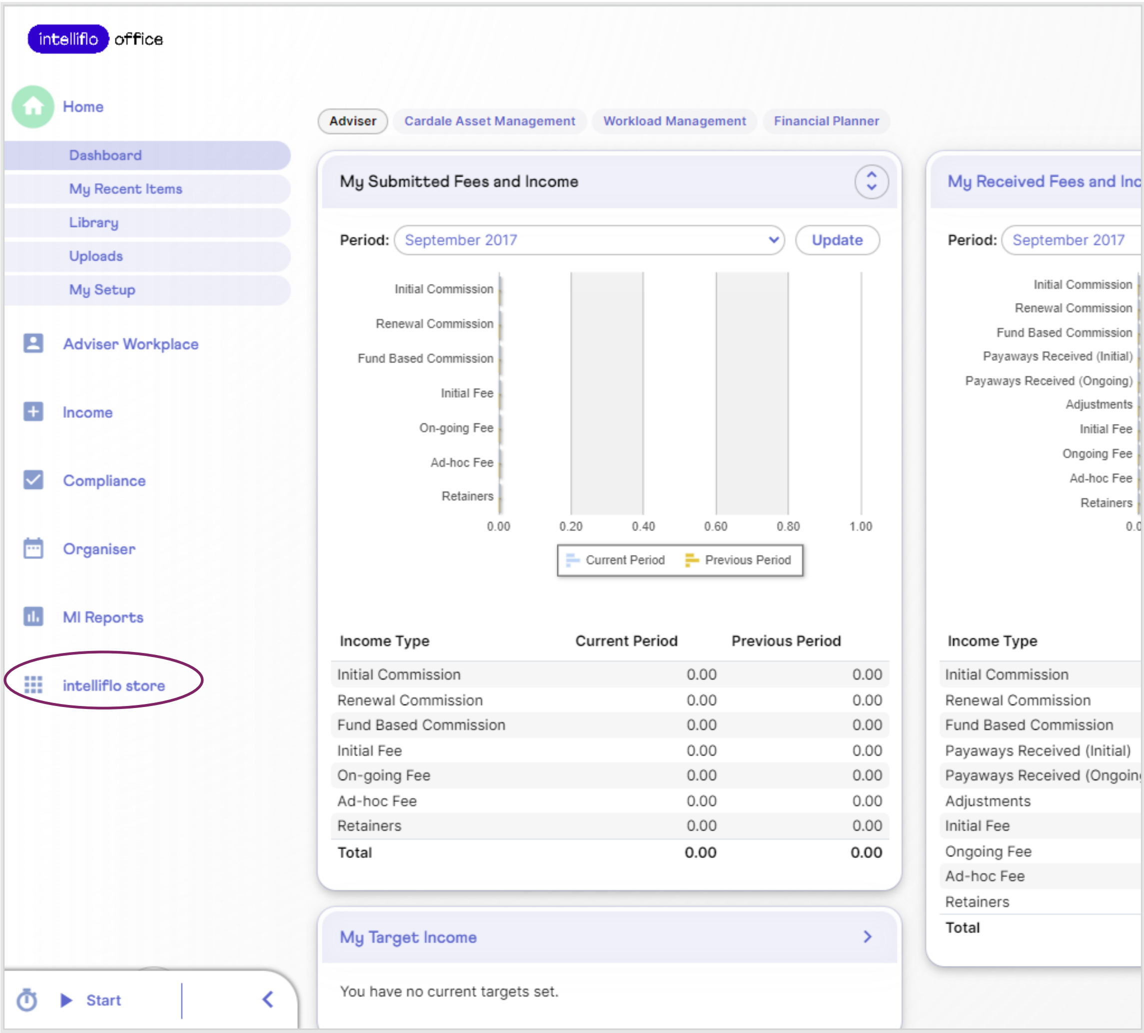
Note that every user who is required to use the integration, must follow the steps outlined.

If you require more Dynamic Planner licences, please contact your Customer Success Manager or the Support Desk Team.

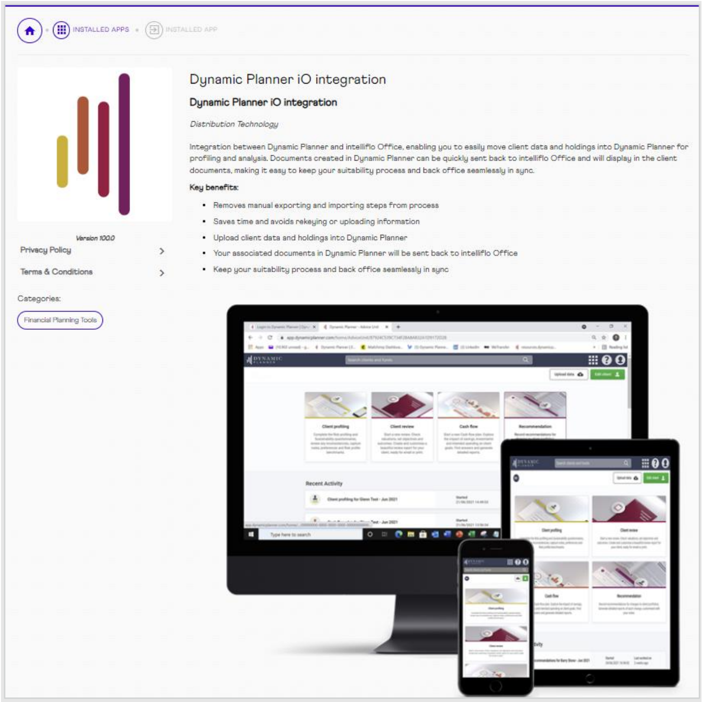
Note that Dynamic Planner cannot be held responsible for the layout of the intelliflo office screens in this guide. This is the test version of intelliflo office that we have. Your firm version may look different.

2 Installing the Dynamic Planner Integration App

To start the process, each person who will use the integration will need to download the **Dynamic Planner iO integration** app. Within your intelliflo office login, visit the **intelliflo store**.

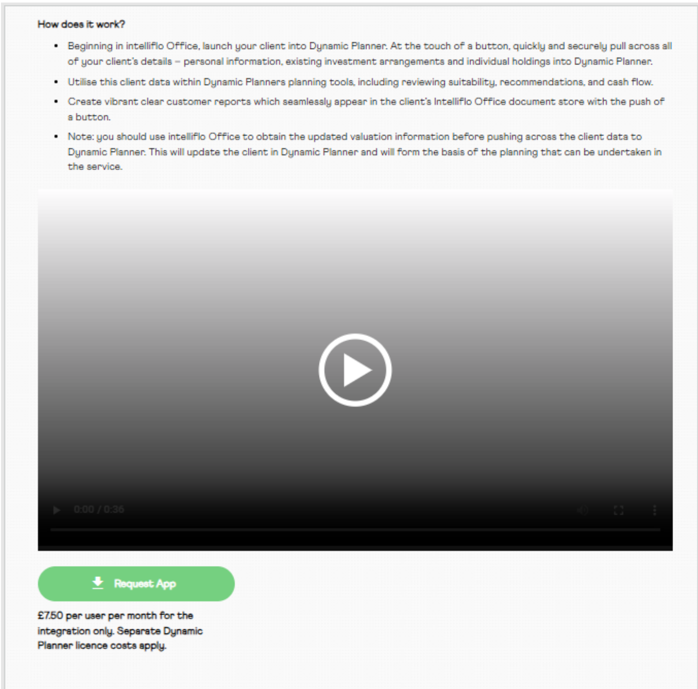


Look for the **Dynamic Planner iO integration** app.

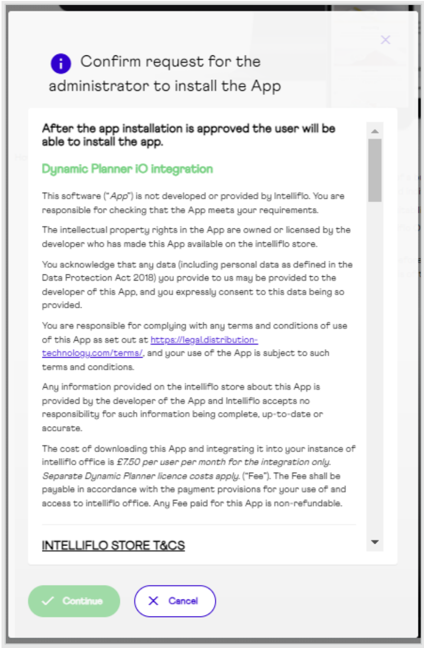


To install the application, click the **Request App** button which can be found at the bottom of the page.

Please note: there is a cost to use the integration which will be added to your intelliflo office invoice. This is £7.50 per user per month. Please check with your Dynamic Planner Administrator that you have permission to do this.

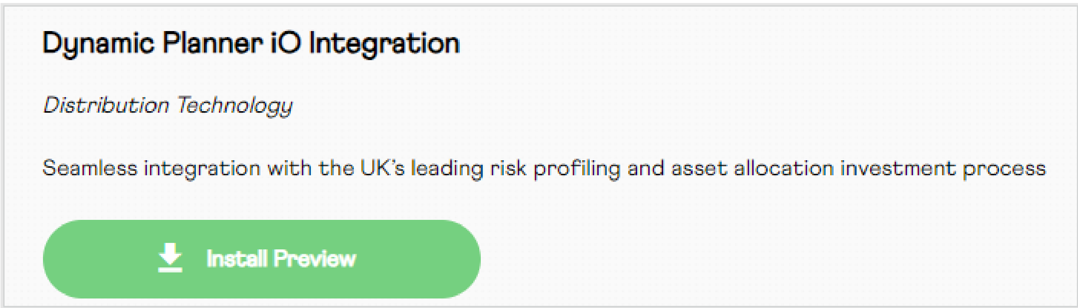


Next you will need to confirm your request to install the App:

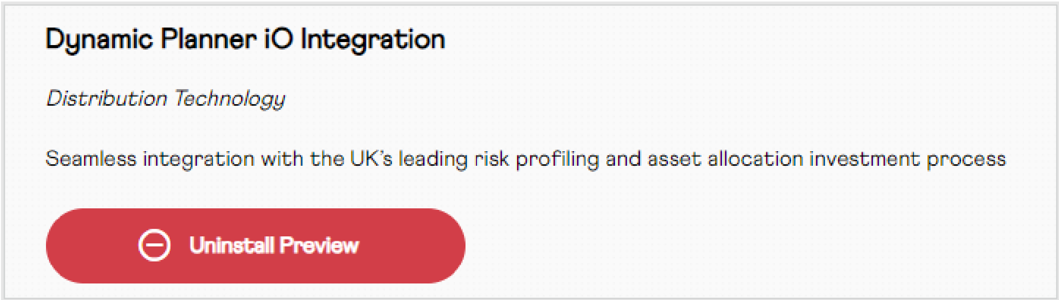


You must scroll to the bottom of the intelliflo store T&Cs to tick the check box agreeing to Terms and Conditions before the **Continue** button is enabled.

Clicking on **Install Preview** will prompt you to enter your Dynamic Planner credentials, which will link your Dynamic Planner licence to your intelliflo office licence. This will open in a separate browser window.



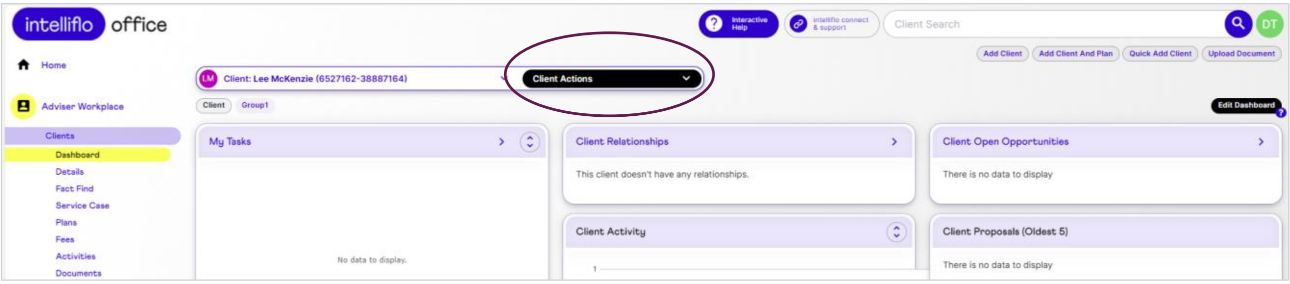
The intelliflo store page will now update to **Uninstall Preview**. This means that your intelliflo office and Dynamic Planner licenses are linked for the integration.



From 30th August 2024, if you want to use the new functionality added to the integration, you should uninstall the app from the intellilfo store, then reinstall the Dynamic Planner iO app.

3 Importing information from intelliflo office to Dynamic Planner

There may be various screens within intelliflo office to trigger the integration. If you are within the client's dashboard, the screen below shows where you can find **Client Actions**.



From 30th August 2024, you will have 2 options for Dynamic Planner:

- **Import to Dynamic Planner (client details only)**
  - This will import basic client contact details only
- **Import to Dynamic Planner (client and plan details)**
  - This will import client financial information including details of wealth policies, underlying funds and valuations

Data item	Basic import	Detailed import
Client details:		
Title	X	X
First Name	X	X
Middle Name	X	X
Last Name	X	X
Date of Birth	X	X
Gender	X	X
Marital Status	X	X
National Insurance number	X	X
Address	X	X
Email	X	X
Telephone	X	
Mobile number	X	X
Relationship	X	X
Plans:		
Provider		X
Plan Type		X
Plan Number		X
Plan Status: In force		X
Funds/holdings		X

Items in red are mandatory in Dynamic Planner to create a client record.

Select the relevant option.

This will initiate the integration process which you will be able to follow on the progress screen.

If you do not have both options available for importing, please uninstall the Dynamic Planner iO app from the intelliflo store, then reinstall it.

Top tip
To ensure you have the most up to date client information for the data transfer to Dynamic Planner, we would suggest that you run the valuations in intelliflo office for all client plans.

The first time you use this function you may be asked to input your intelliflo office login details once more prior to moving the information across to Dynamic Planner.

Import to Dynamic Planner (client details only)

When you use this option, only basic client personal and contact details are sent to Dynamic Planner. No financial information.

We have introduced a new screen which checks if the client(s) already exists in Dynamic Planner and if the information is a match. Checks will be done based on:

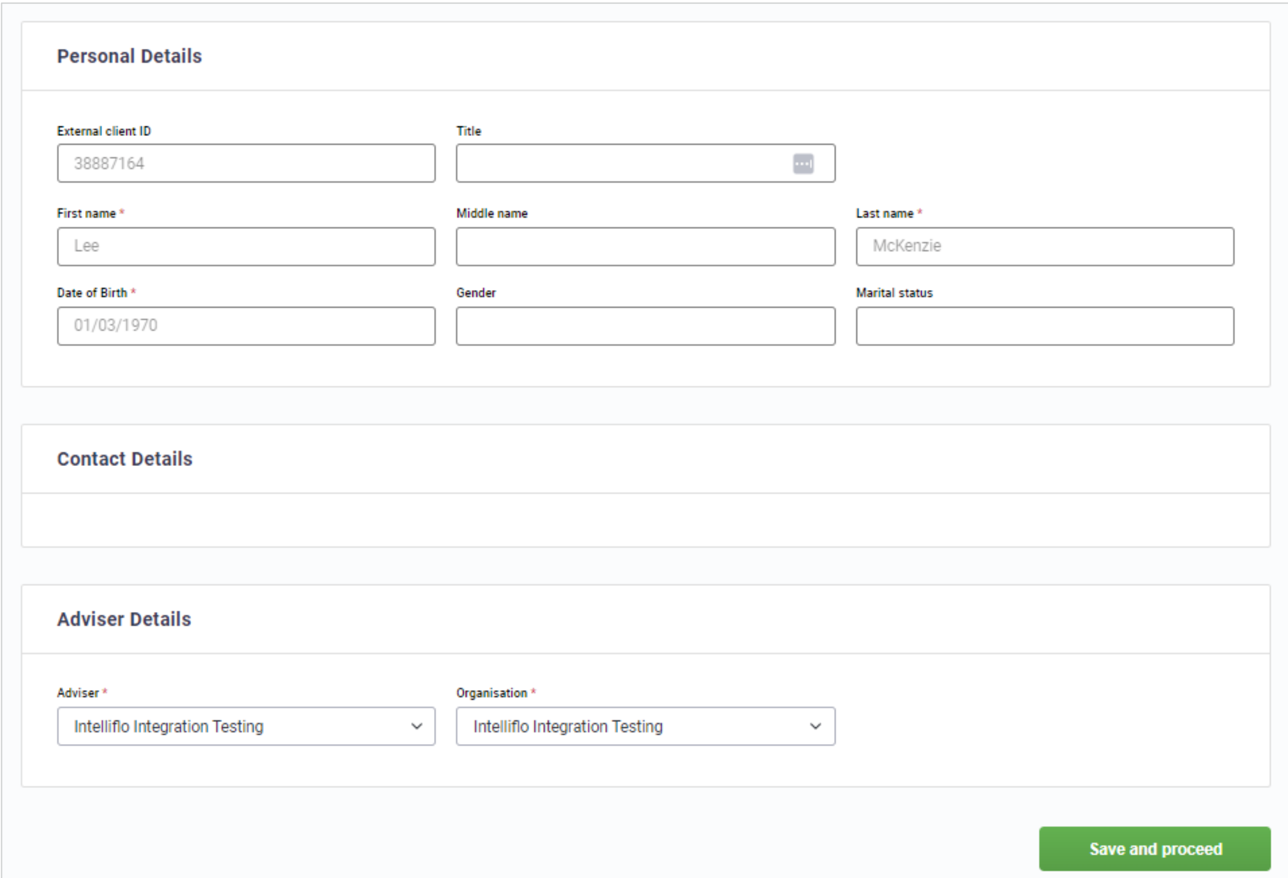
First name
Last name
Date of birth

If the information is not correct either in intelliflo office or Dynamic Planner, you will need to update it in intelliflo office and follow the instructions on screen.

If you are not already logged in to Dynamic Planner, you will be prompted to log in with your Dynamic Planner Username and Password.

New client not on Dynamic Planner

You will be presented with a screen showing the details to be imported. You will have the option at the bottom of the screen to select the adviser and organisation where the client should be added in Dynamic Planner. Note that this is dependent on your firm set up within Dynamic Planner.

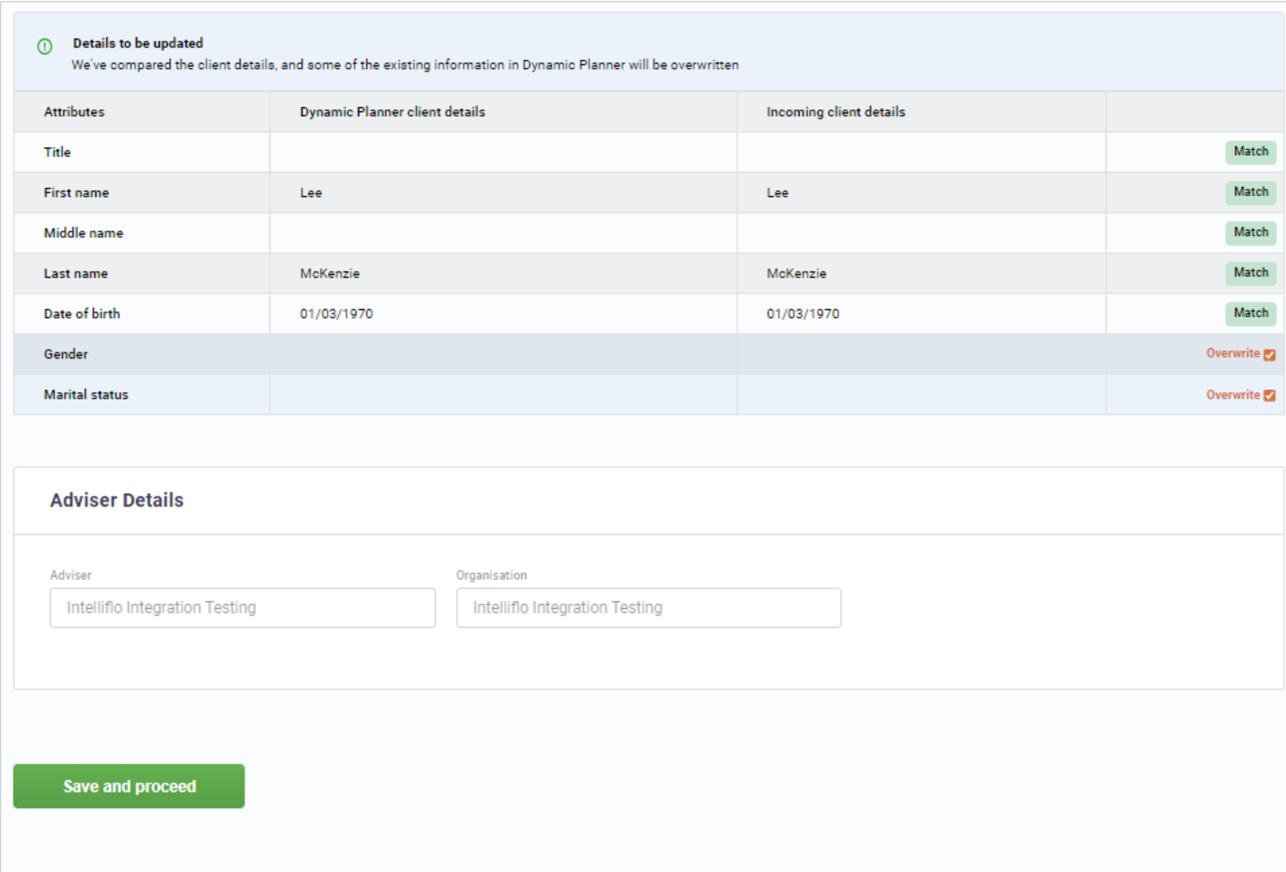


When you are ready to import, select the **Save and proceed** button at the bottom of the screen to be taken to the client dashboard in Dynamic Planner.

Existing client on Dynamic Planner

Where the client already exists on Dynamic Planner, you will see a slightly different screen.

We will show if any details are different in Dynamic Planner and give you the option to overwrite these.


Details to be updated
We've compared the client details, and some of the existing information in Dynamic Planner will be overwritten

Attributes	Dynamic Planner client details	Incoming client details	
Title			Match
First name	Lee	Lee	Match
Middle name			Match
Last name	McKenzie	McKenzie	Match
Date of birth	01/03/1970	01/03/1970	Match
Gender			Overwrite
Marital status			Overwrite

Adviser Details

Adviser
Intelliflo Integration Testing

Organisation
Intelliflo Integration Testing

Save and proceed

Once you choose **Save and proceed** you will arrive at the client dashboard in Dynamic Planner.

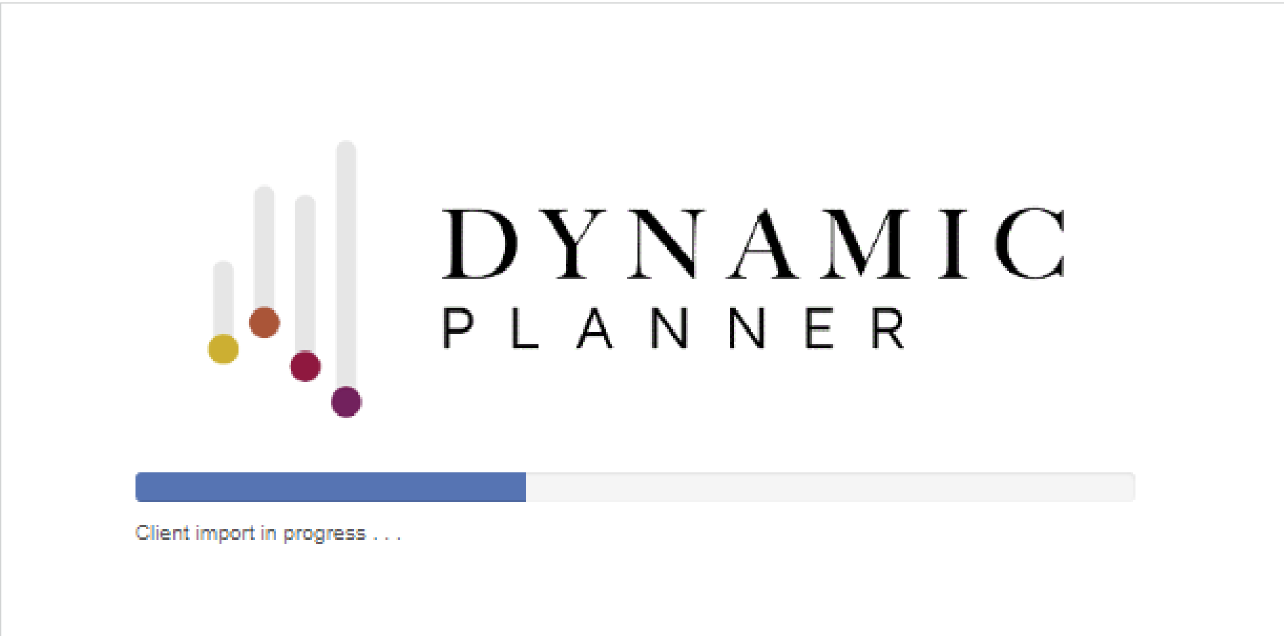
Import to Dynamic Planner (client and plan details)

If you have been a user of the integration pre-August 2024, this is the process that you will be familiar with.

Within the Client Actions dropdown in intelliflo office, select Import to Dynamic Planner (client and plan details). This will send all client and financial information to Dynamic Planner.

If you are not already logged in to Dynamic Planner, you will be prompted to log in with your Dynamic Planner Username and Password.

You will see the client import progress bar loading.



When there is a successful import, you will be shown an **Import complete** message and the option to **Proceed to Dynamic Planner**.

Errors / Warnings

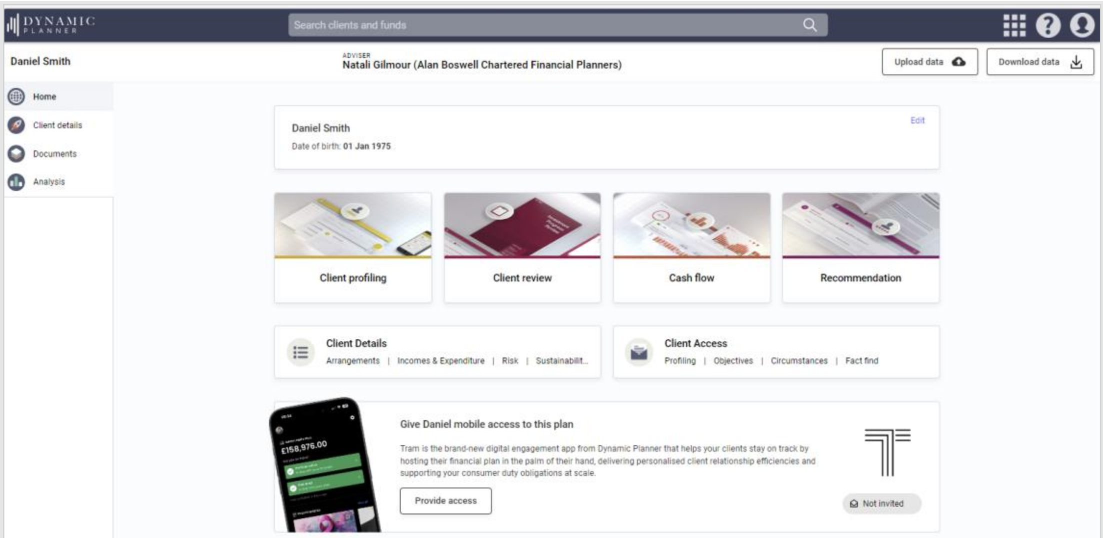
If there are any errors this may stop the entire import of your client from intelliflo office into Dynamic Planner. You should review this guide to understand the format of the data and correct any errors in intelliflo office before attempting the import again.

There may also be warning messages which do not prevent the import of your client into Dynamic Planner and the button to **Proceed to Dynamic Planner** will appear.

For example, if a fund cannot be identified by the ISIN code, a summary fund will be created instead. You can then update the fund within the arrangements section in Dynamic Planner.

Proceed to Dynamic Planner

You will be taken direct to the client's dashboard within Dynamic Planner where you can now choose to carry out your client's financial planning.



Within Dynamic Planner, you have the following financial planning options available for single or joint clients depending on your licence agreement:

- Client access
    - Issue the client with the risk and sustainability questionnaires.
    - Ask them to provide incomes, expenditure, arrangements and goals.
    - Find out about their objectives and changes in personal circumstances.
- Client profiling
    - Investor Experience questionnaire
    - Attitude to Risk questionnaire
    - Capacity for Risk questionnaire
    - Sustainability questionnaire
    - Financial Wellbeing questionnaire (link by separate URL)
- Client Review
- Cashflow
- Recommendation

4 Information that is carried over from intelliflo office to Dynamic Planner

It is crucial that the client's information in intelliflo office is up to date and accurate as this could prevent the integration from working correctly.

The list of information that Dynamic Planner deems mandatory may differ to intelliflo office so it's best to check prior to triggering the integration link, that all information has been completed for your client.

The integration will work when sending over single client information, or joint clients.

You have 2 options for sending information over to Dynamic Planner. Depending on the option that you select, the integration may send over:

- Active clients.
- Client personal information.
- Client contact information.
- Active plans.
- Arrangements supported within Dynamic Planner.
- Arrangements with supported ISIN fund codes.
- Arrangements with values greater than £0.00.

Income and expenditure data cannot be automatically imported from intelliflo office, but you can enter it in Dynamic Planner through Client Access, uploading a spreadsheet or manually typing it in.

4.1 Client Details

Dynamic Planner requires clients to have:

- Client type: Person, retail client.
- Client status: Active.
- First name.
- Last name.
- Date of Birth where the client is over 18 years of age.
- Primary relationship if joint clients.

Within Dynamic Planner you have the option to enter the client's address and contact information but it is not mandatory. It may be best practice to enter in the client's email address and mobile number as this will be required for sending the Client Access links inviting them to complete questionnaires and provide cashflow details such as income and expenditure.

Please note: corporate accounts, trusts and clients under 18 years of age are not supported.

Where there are joint clients to be carried over to Dynamic Planner, both should be active. If one is not active, only the active client will come over.

Top tip
If the client already exists in Dynamic Planner, you must ensure that the client's name, date of birth and National Insurance number (if entered) all match. For example, if the client is called Nick in Dynamic Planner and Nicholas in intelliflo office, the match will fail. You should ensure that both systems match then try the integration again.

4.2 Relationships

Dynamic Planner will only support one relationship type and will pull across the primary relationship that has been entered into intelliflo office.

Supported primary relationship types are:

- Marriage
- Civil partnership
- Co-habiting
- Divorced couple
- Parent/child
- Siblings
- Business partner
- Other

Both clients should have the same adviser within intelliflo office if they are being advised by the same adviser in Dynamic Planner.

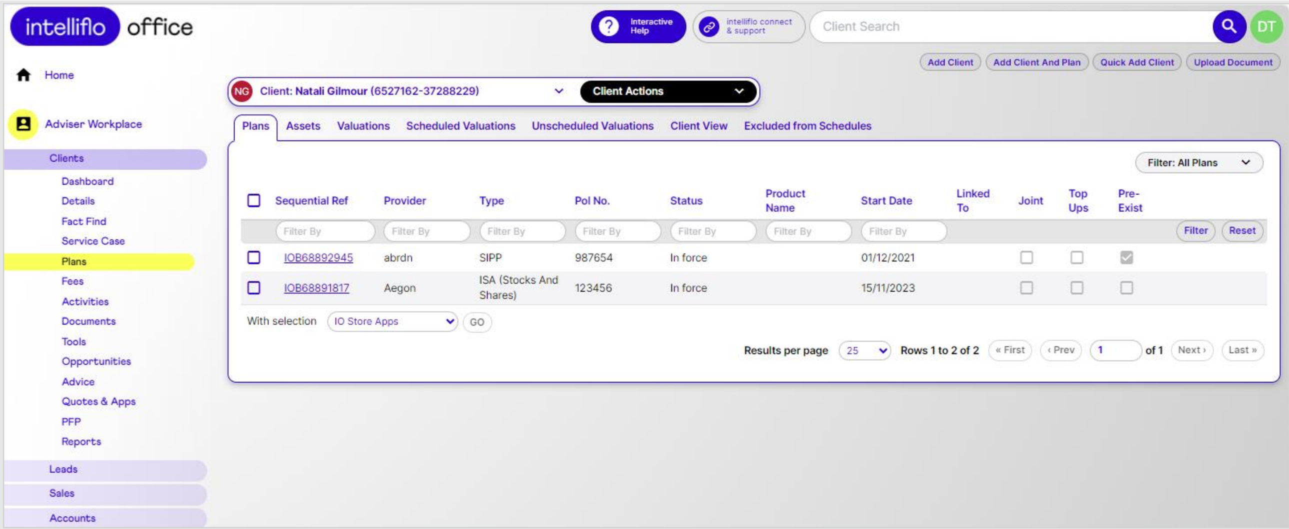
Please note that multi-relationship policies are not supported by the integration.

4.3 Plans

As much information as possible should be input for each of the client's plans. To ensure that the information is shown correctly in Dynamic Planner, run your valuations in intelliflo office prior to sending over to Dynamic Planner.

For the integration to work successfully, Dynamic Planner require the following fields to be populated:

- Provider
- Product Type
- Policy Number (ensure no spaces at the beginning of the field)
- Status: In force
- Joint – not all products can be joint plans



4.4 Provider

Dynamic Planner will attempt to match the list of providers that we have live in our Product Research database. If there is not an exact match, it may appear on Dynamic Planner as ‘Other’. You will be able to override this in Dynamic Planner, and the integration will remember this in future.

4.5 Product Status

Policies that are marked as draft or Out of force are not supported. The status should be In force.

4.6 Supported Products

The integration supports products which are primarily pensions and investments.

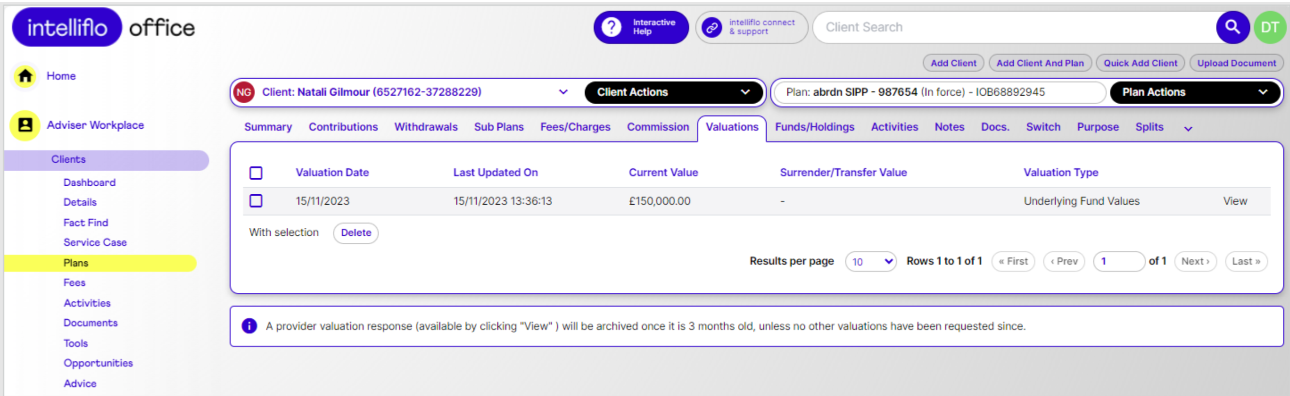
DB pensions are **not** shown in Dynamic Planner as a pension arrangement. The monthly income is used at the point of the pension being drawn within our Cashflow function. You shall need to manually input this information or the client may provide using Client Access Invitation.

There may be products which are supported in intelliflo office as joint but not recognised within Dynamic Planner as being joint, for example, ISAs.

See appendix A for the full list of supported products.

4.7 Valuations

Each plan needs to have underlying funds where the fund value and overall plan valuation is greater than £0.00.



Top tip

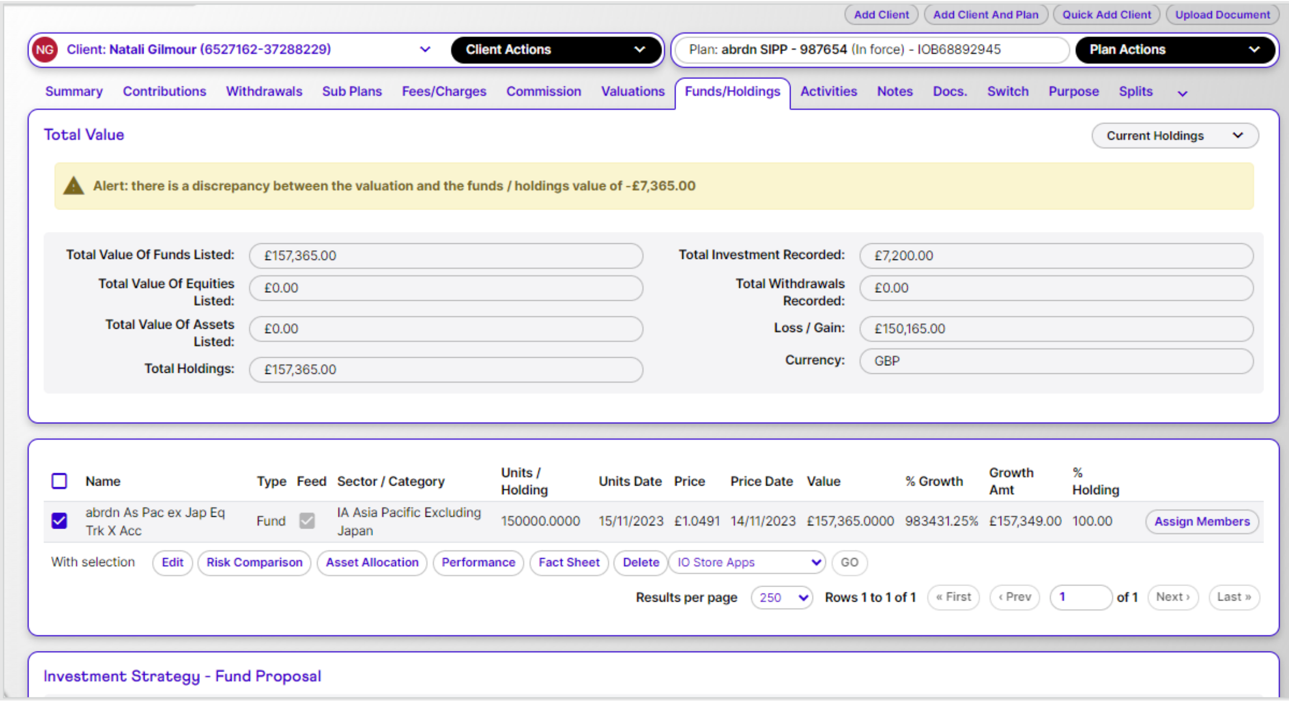
When looking at the current value, it could show positive even if there is a negative value due to a pending trade. Please wait a day or 2 until the trade has settled and there is a positive value for all underlying funds to send over to Dynamic Planner.

4.8 Funds/holdings

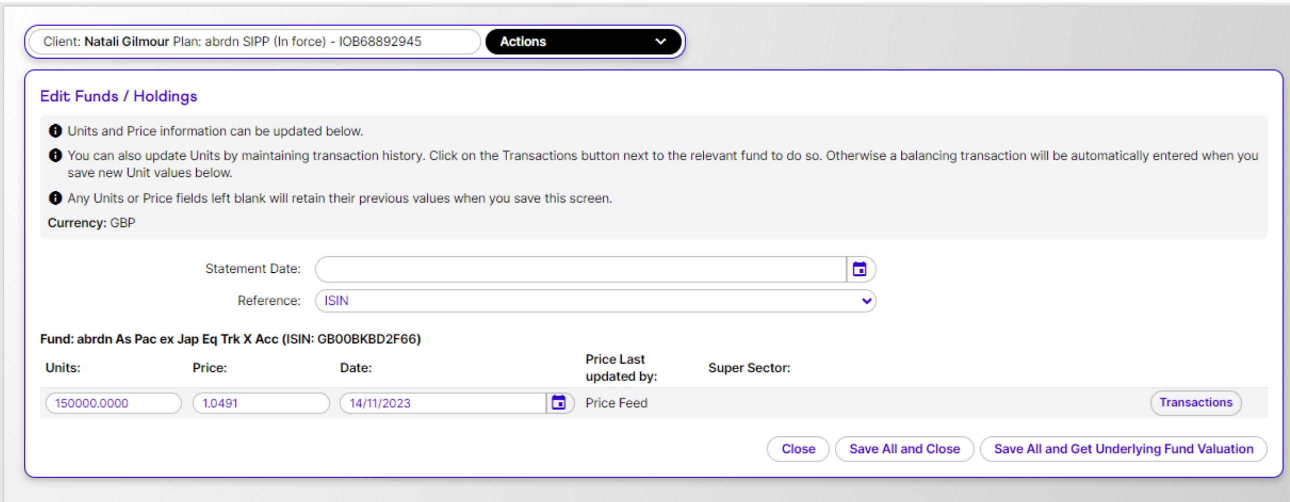
Each fund/holding is required to have an ISIN code with its own unit price. To find this out, in intelliflo office, go to the Funds/Holdings page and place a tick to the left of the fund name and choose **Edit**.

The fund type must also be a **fund** as those with type Equity are not supported. You can update the type from Equity to fund if it is a recognised fund ISIN code.

Discretionary portfolios could fail as many do not have recognised ISIN codes. The underlying individual funds may come across to Dynamic Planner. You may be able to save these funds as your chosen discretionary portfolio within Client Review.



You will see the ISIN code to the right of the fund name and you will be able to view the last time your price feed was updated, the number of units and the price per unit.



4.9 Cash / ringfenced account

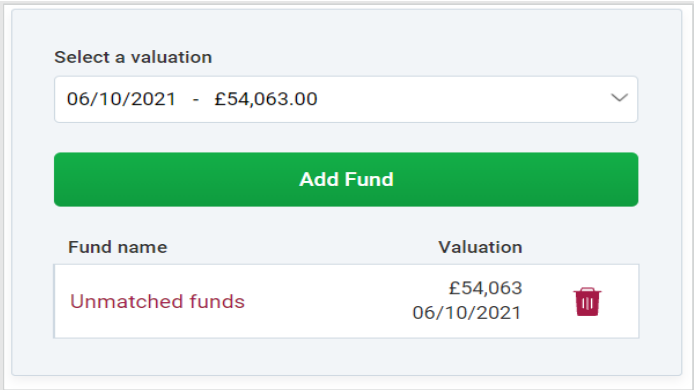
Depending on how cash is set up within a plan, it may not carry over to Dynamic Planner as cash. It may appear as a summary value.

You can easily amend this in Dynamic Planner and the integration will remember this for future.

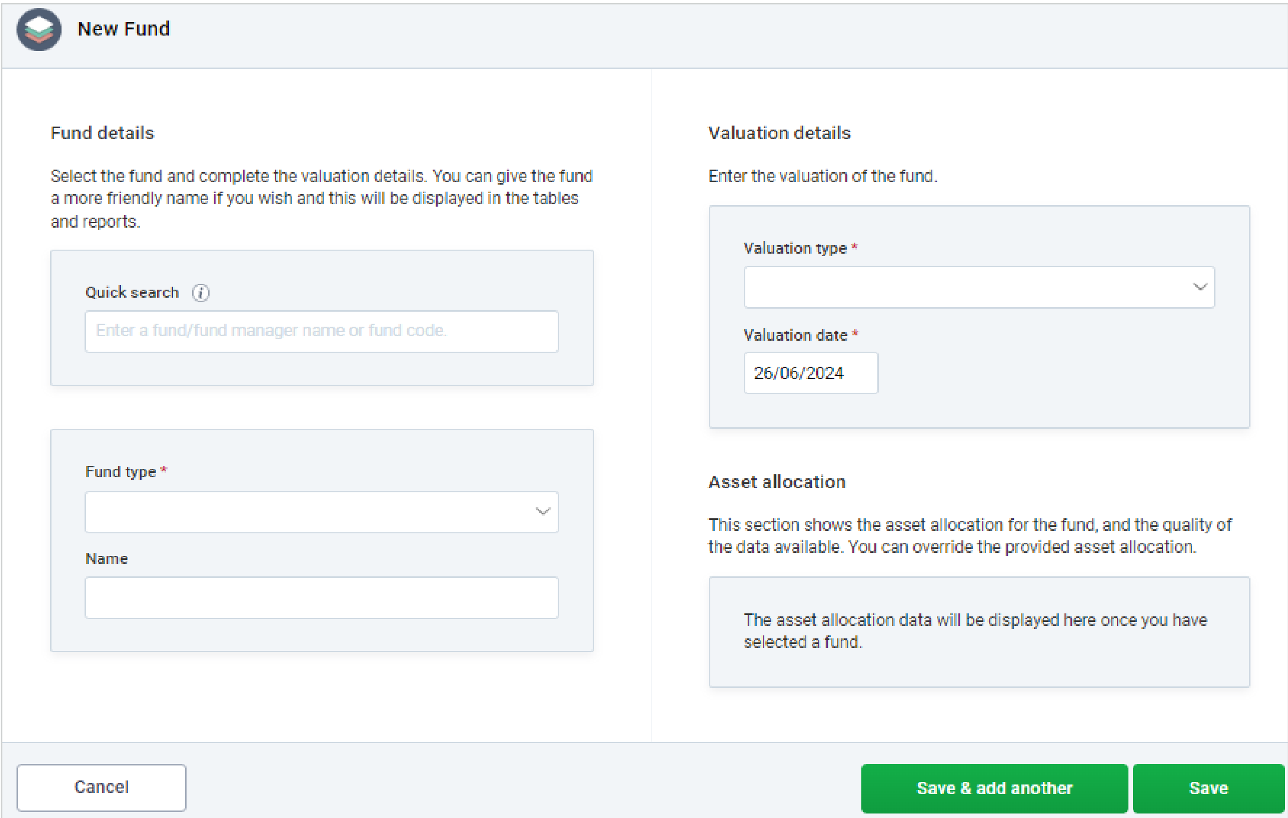
4.10 Unmatched holdings

If a policy's holdings are not recognised by Dynamic Planner, they may be displayed as unmatched funds. The integration will still pull through the Client's plan with the correct value; however, instead of listing all the funds held by the plan, it adds them as "Unmatched funds" see below.

To override this, click on the '**bin**' icon to the right hand side of the fund. Then use the green "**Add Fund**" button at the top to enter in your required fund.



To enter in the value, select the Valuation Type drop down on the right hand side. You can choose between adding a Direct Value or a From Statement value. Click Save.

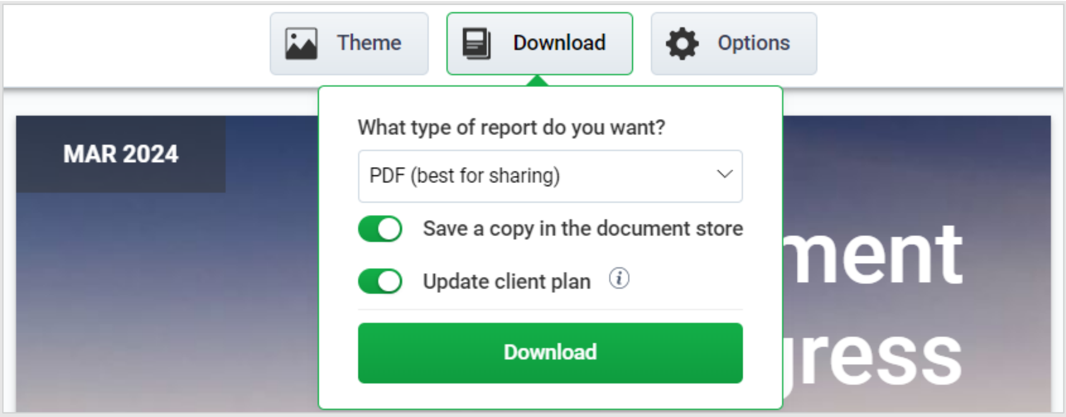


This process will need to be repeated on a fund by fund basis.

5 Saving Documents back to intelliflo office

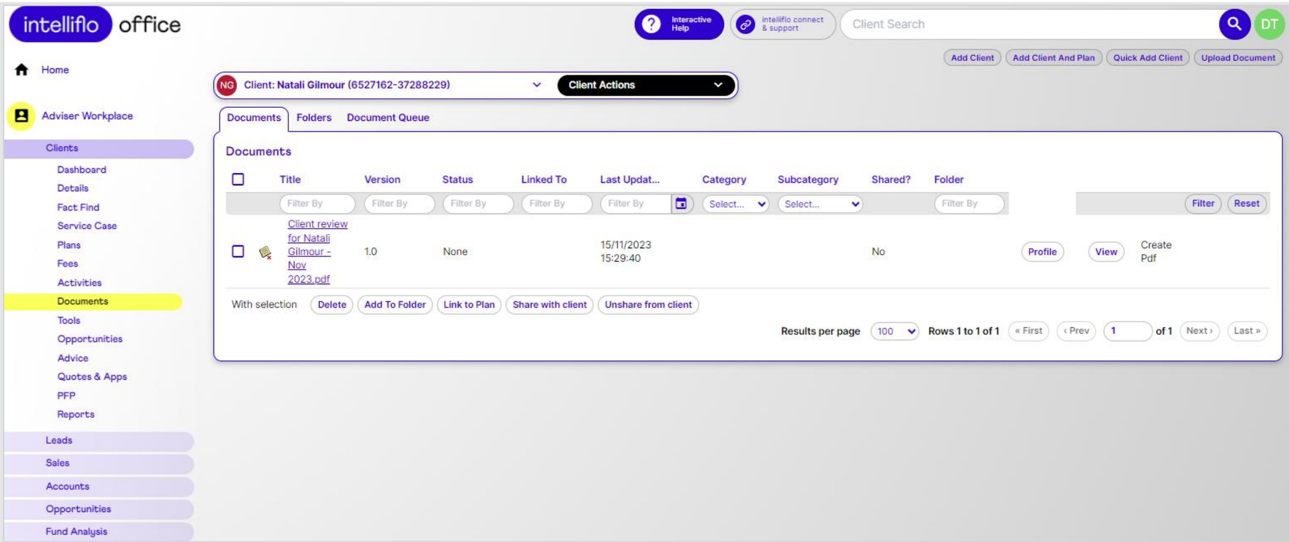
Once you have completed the client reports, you will be able to save this back to intelliflo office using the **Download** option at the top of the report preview screen. You can download the report as a PDF or Word File.

You must ensure the toggle is checked to correctly save a copy in the document store, then click **Download** to initiate the transfer of the document back to intelliflo office.



The version of the file that you opt to save will be the version that saves back to intelliflo office.

This document can be found in the Document store within the Clients menu.



You can then choose to share the document with the client using your available options within intelliflo.

Only use this process when you have completed the client's report. If you follow this process each time you view the report, you will have multiple versions saved in intelliflo office.

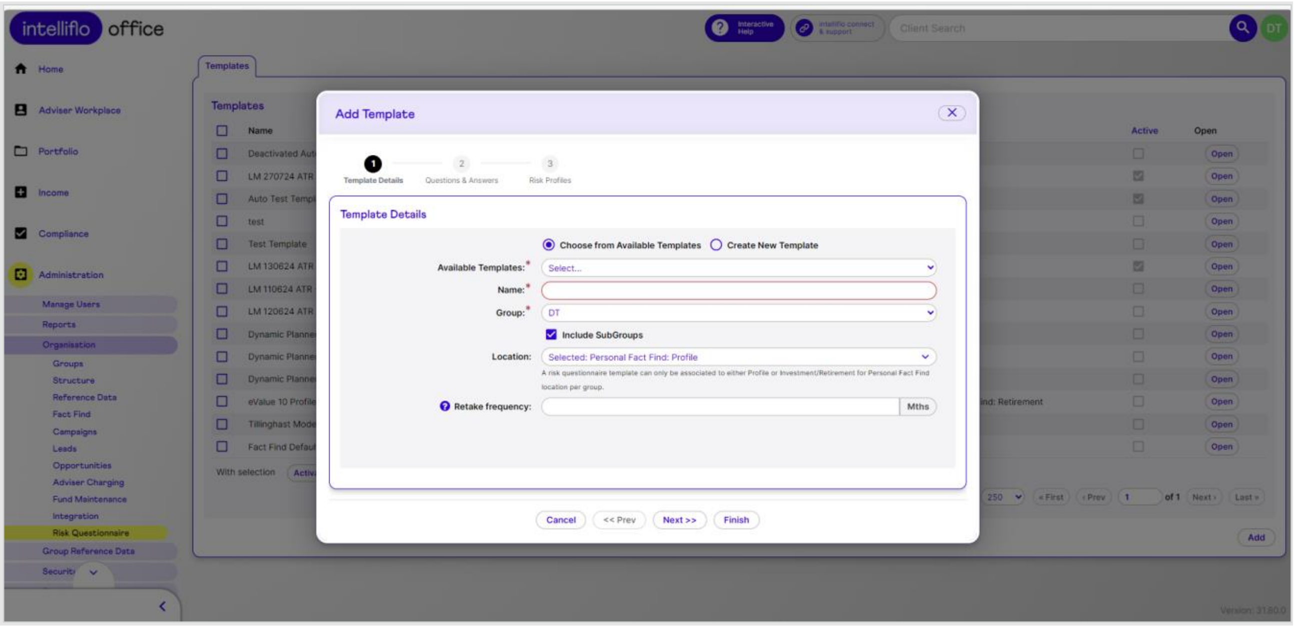
This process will only work if the client was sent from intelliflo office using the integration.

6 Adding the risk template to intelliflo office Fact Find

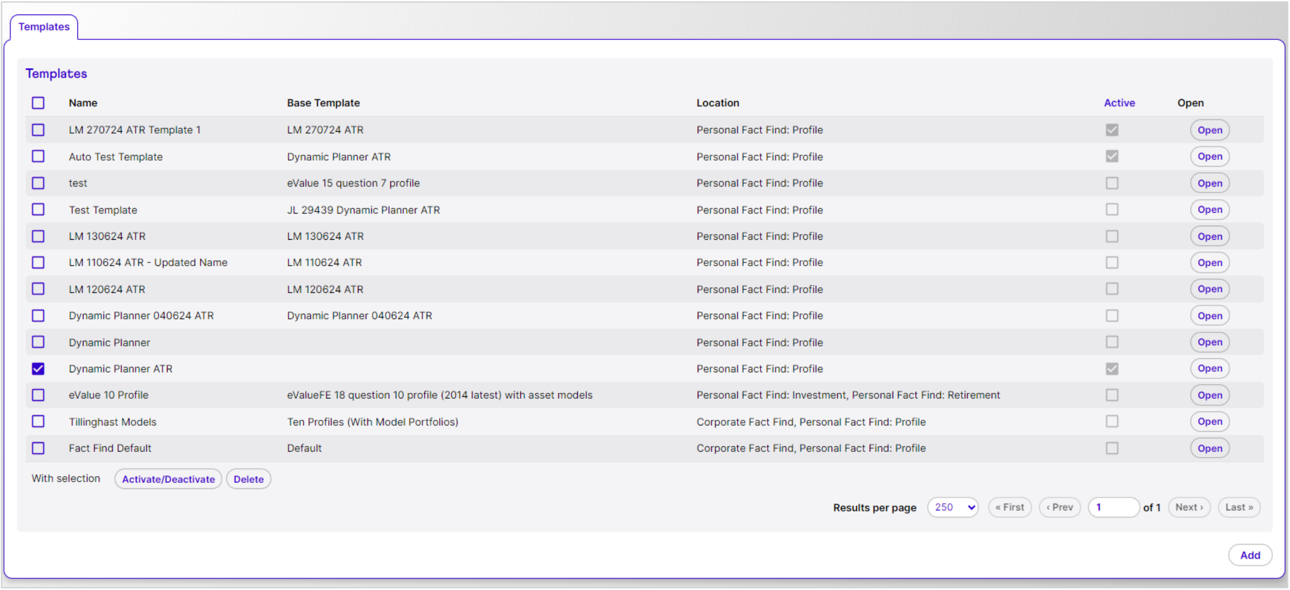
Before sending risk information from Dynamic Planner to intelliflo office, you must first add in the risk questionnaire template in intelliflo office.

Your Dynamic Planner Admin user for intelliflo office will need to do this for everyone in the firm. From the main homepage on intelliflo office, go to **Administration**, then **Organisation**, and from the bottom of the menu select **Risk Questionnaire**.

You will then select **Add** from the bottom right hand of the screen and from the Available Templates option, select **Dynamic Planner ATR**. You can also give it your own name in the 2nd field. Complete the other steps in the wizard.



When your risk questionnaire template has been added, you will then need to activate it for your firm. Find the template from the list of templates, simply place a tick to the left of it, and click the button to **Activate/Deactivate**. You will see under the Active column if it is now activated.



Name	Base Template	Location	Active	Open
LM 270724 ATR Template 1	LM 270724 ATR	Personal Fact Find: Profile	✓	Open
Auto Test Template	Dynamic Planner ATR	Personal Fact Find: Profile	✓	Open
test	eValue 15 question 7 profile	Personal Fact Find: Profile		Open
Test Template	JL 29439 Dynamic Planner ATR	Personal Fact Find: Profile		Open
LM 130624 ATR	LM 130624 ATR	Personal Fact Find: Profile		Open
LM 110624 ATR - Updated Name	LM 110624 ATR	Personal Fact Find: Profile		Open
LM 120624 ATR	LM 120624 ATR	Personal Fact Find: Profile		Open
Dynamic Planner 040624 ATR	Dynamic Planner 040624 ATR	Personal Fact Find: Profile		Open
Dynamic Planner		Personal Fact Find: Profile		Open
Dynamic Planner ATR		Personal Fact Find: Profile	✓	Open
eValue 10 Profile	eValueFE 18 question 10 profile (2014 latest) with asset models	Personal Fact Find: Investment, Personal Fact Find: Retirement		Open
Tillinghast Models	Ten Profiles (With Model Portfolios)	Corporate Fact Find, Personal Fact Find: Profile		Open
Fact Find Default	Default	Corporate Fact Find, Personal Fact Find: Profile		Open

7 Dynamic Planner extension

From 30th August 2024, you can send income, expenditure and risk information added or updated in Dynamic Planner back to intelliflo office.

This is a helpful feature if you have used the Client Access invitation to ask the client to complete information whether you use our cashflow planning module or not, or you have made any amends while carrying out the cashflow planning and want to ensure that intelliflo office reflects the new amends. Risk information that will go back will populate the client's attitude to risk, the agreed selected benchmark, any notes and the date it was completed within your Fact Find area in the client's record.

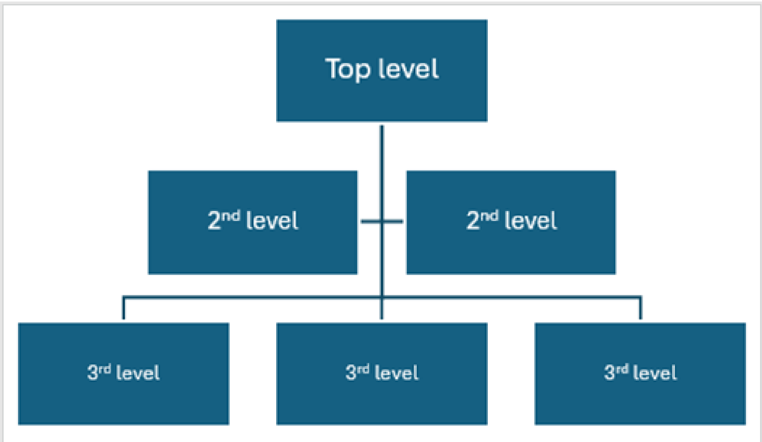
To get started, the allocated Dynamic Planner Admin user at your firm will need to add on the extension button in Dynamic Planner to allow the data to go back.

If you do not know who this is or you do not have a Dynamic Planner Admin licence holder, please contact our Support Team.

Adding the Extensions button in Dynamic Planner

Depending on your hierarchy structure within Dynamic Planner, only one user at a top level will need to carry out the following instructions for all in the firm to use it.

If added by a user at a lower level, this will only be available for the users at this level or below.



If you are unsure of your hierarchy structure in Dynamic Planner or who the Dynamic Planner Admin user is, please check with your Customer Success Manager or Support Desk Team.

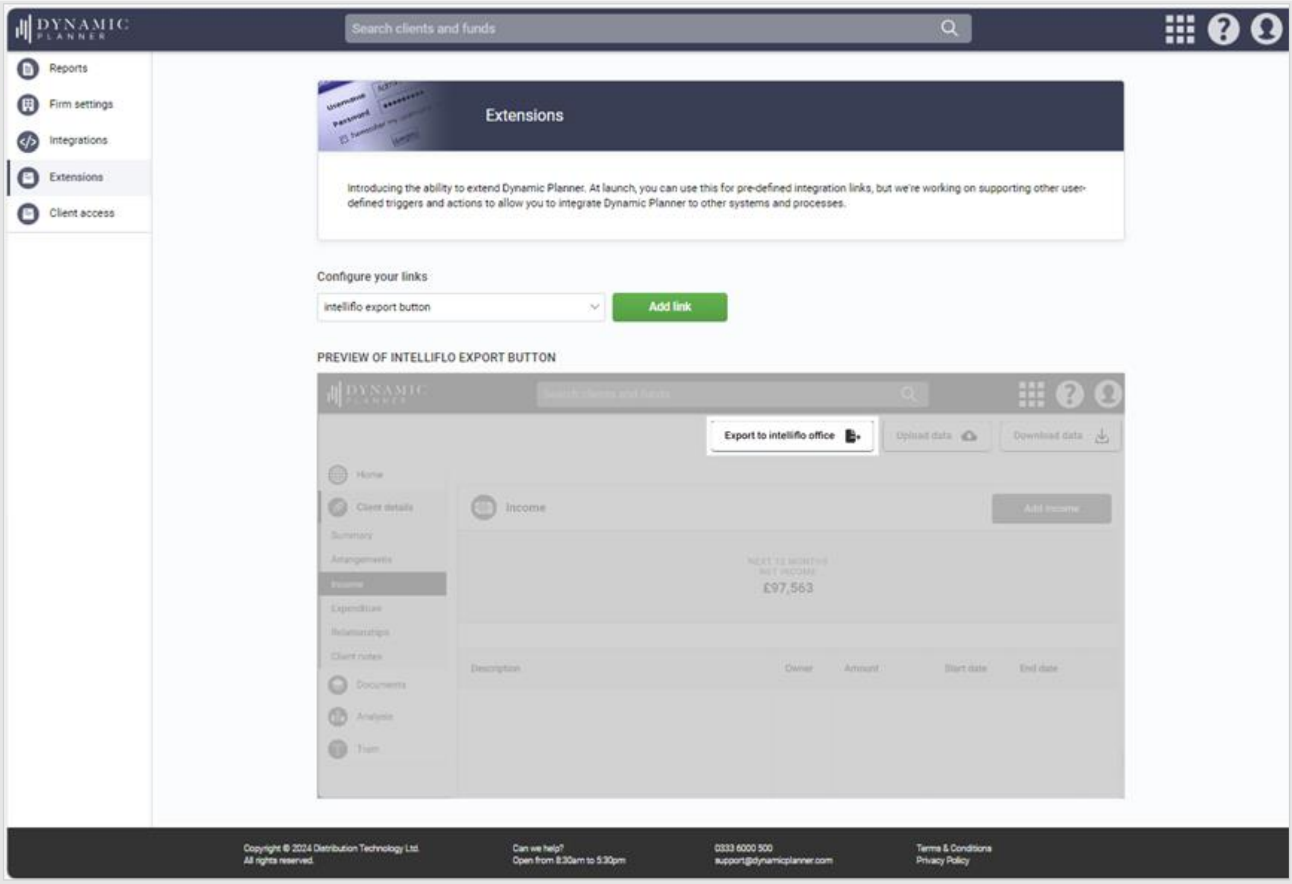
If there is not a Dynamic Planner Admin user allocated in your firm, this role can be added to a designated licence holder at a suitable place in your firm's hierarchy.

The Dynamic Planner Admin user should carry out the following instructions on behalf of the firm.

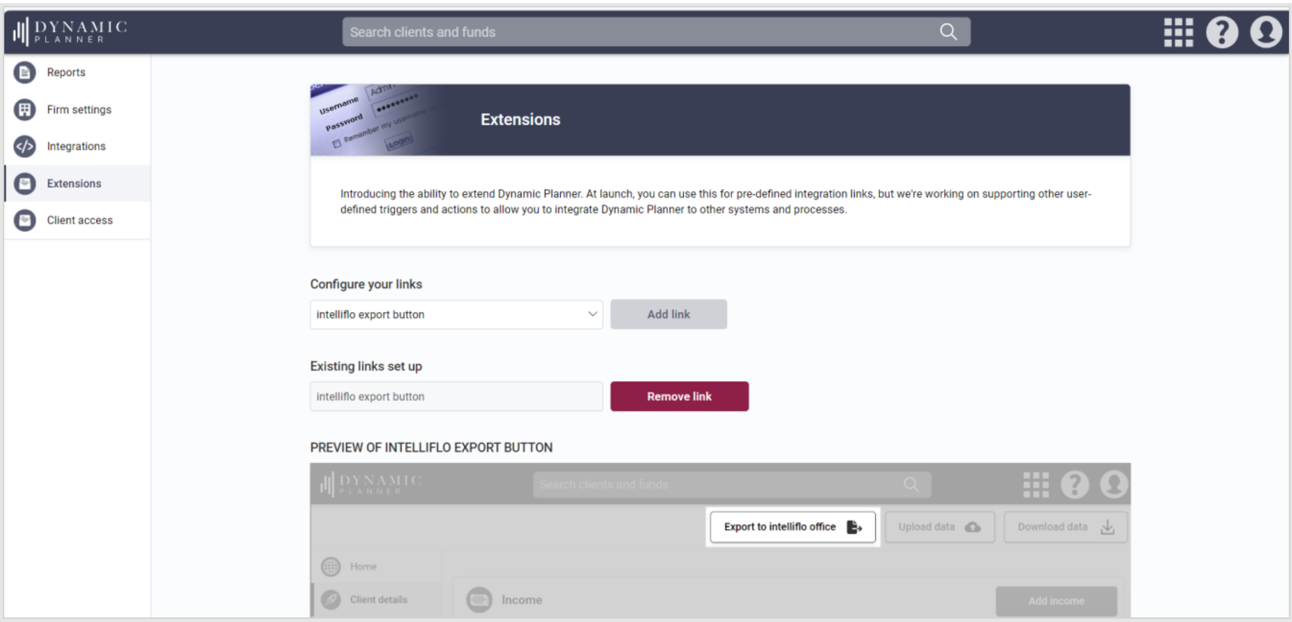
Go to the **Settings** area and select **Extensions.**

You will be presented with the page below.

To add the **intelliflo export button**, simply click **Add link**.



You'll now see that the page has updated and the option to **Remove link** has appeared:

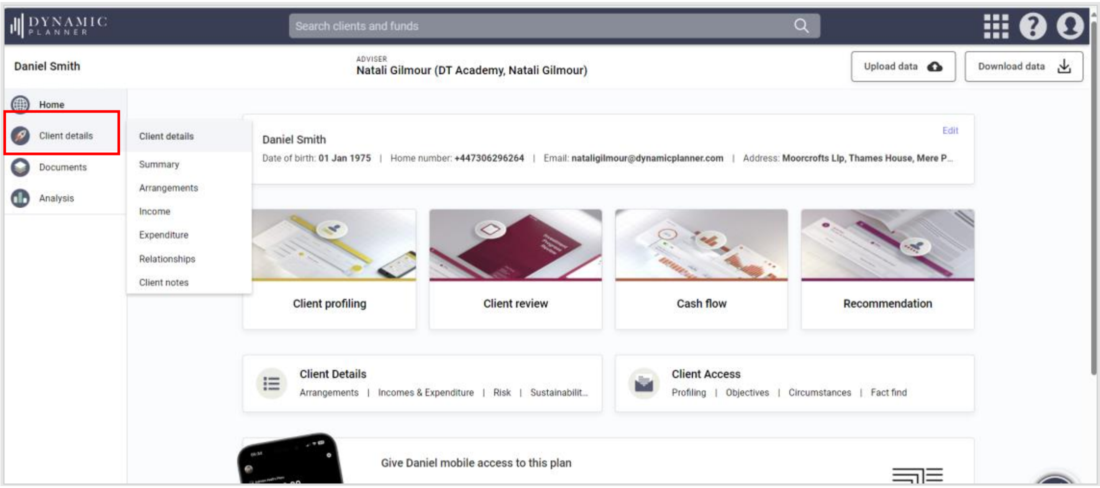


8 How to export income, expenditure and risk data back to intelliflo office

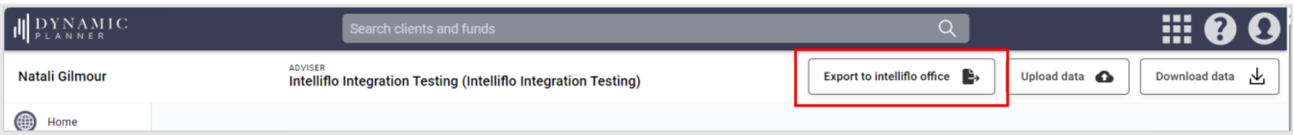
This process can be carried out for single life or joint clients.

From the client dashboard within Dynamic Planner, go to **Client details** then select **Income** or **Expenditure**.

Note: You can only trigger risk information to go back to intelliflo office from these pages.



If you are an intelliflo office user and have used the integration previously for the client(s), you will see a button at the top of the screen **Export to intelliflo office**.

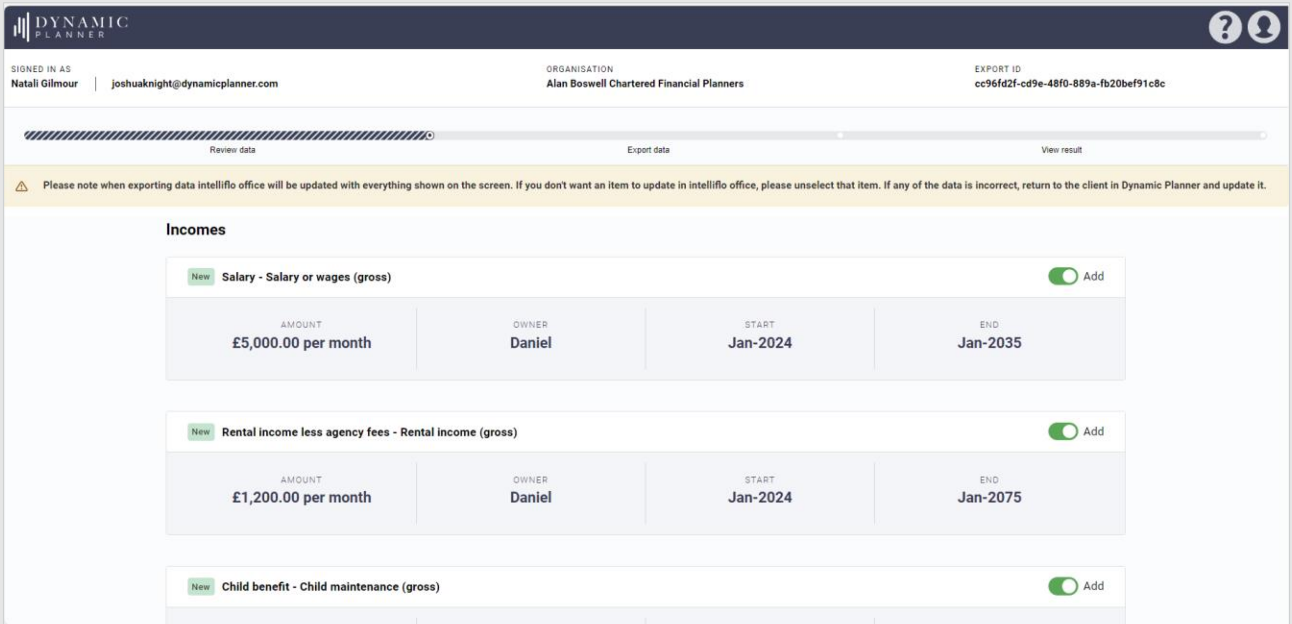


Click the Export to intelliflo office button to view a list of data items to be sent from Dynamic Planner.

Please note: if there is no information in these pages, then no information will be sent back to intelliflo office for the client.

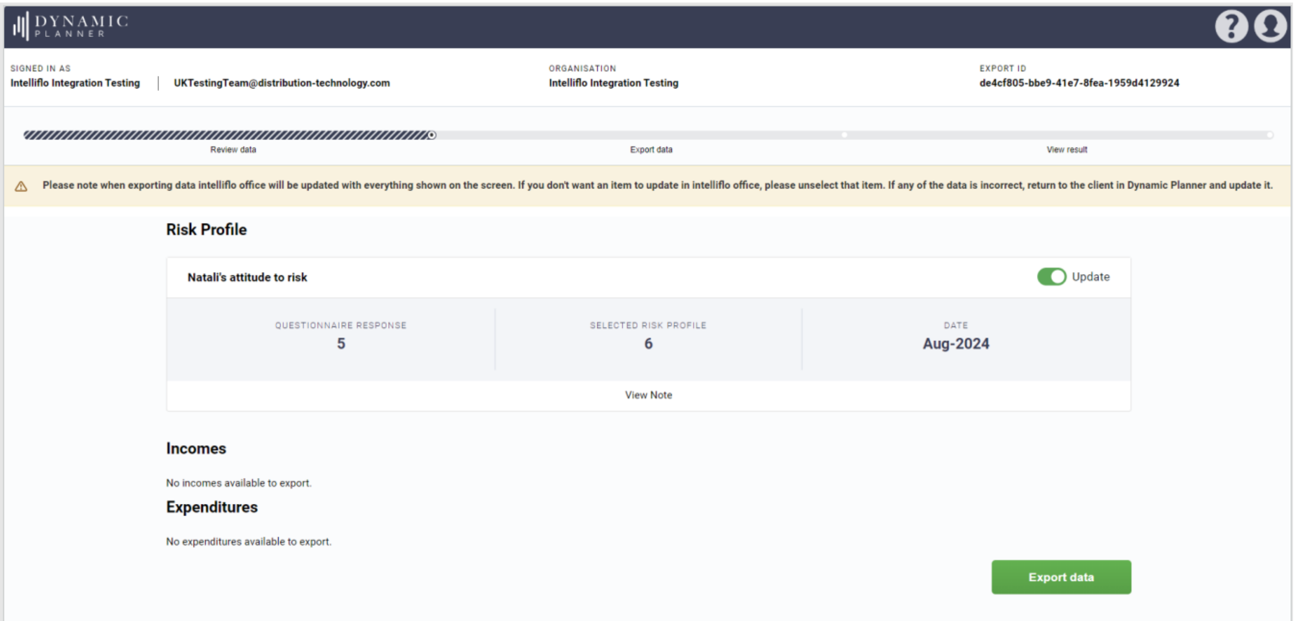
Where there is data present, you will see that there are toggles at the right of each item giving you the option to **Add** the data to intelliflo office, if you have not previously used the export feature, or **Update** if you have previously used the export feature.

The example below shows income and expenditure.



When you choose either Income or Expenditure, the list you will be presented with, will cover both Income and Expenditure. Depending on the amount of data items listed, you may need to scroll to the bottom to check each and to click **Export data**.

The example below shows the risk information to be updated in intelliflo office.



Once the process begins, you will see a progress bar across each data item then an update to say it's been Added or Updated.

When you choose to export the data, any income and expenditures can be done at the same time without having to go into Expenditures to repeat the process.

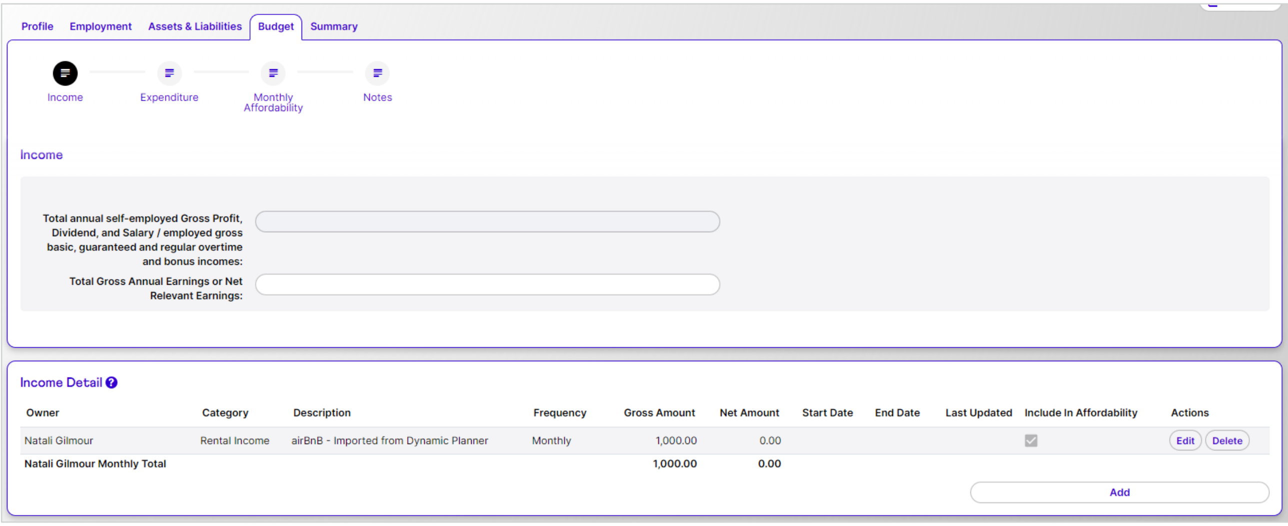
When the process is complete, you will notice that the button name changes to **Launch intelliflo office**.

When intelliflo office is launched, you will land on the client dashboard for that client.

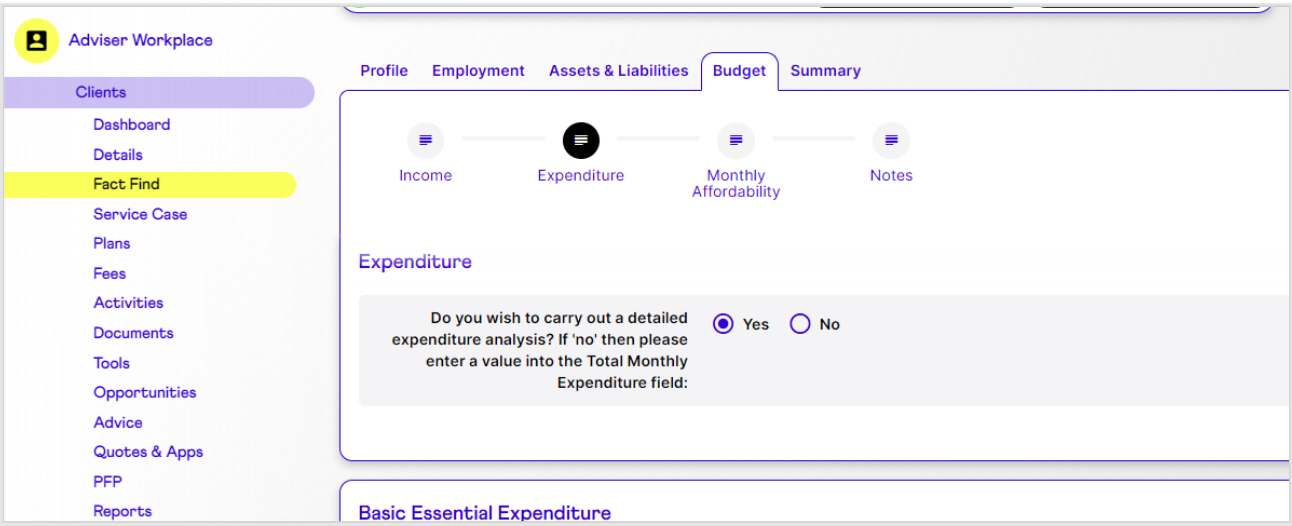
9 Where to find exported data in intelliflo office

The Income and Expenditure data will be sent to the Fact Find area within the intelliflo office client dashboard under Budget.

You will find the words '-imported from Dynamic Planner' after the item description.



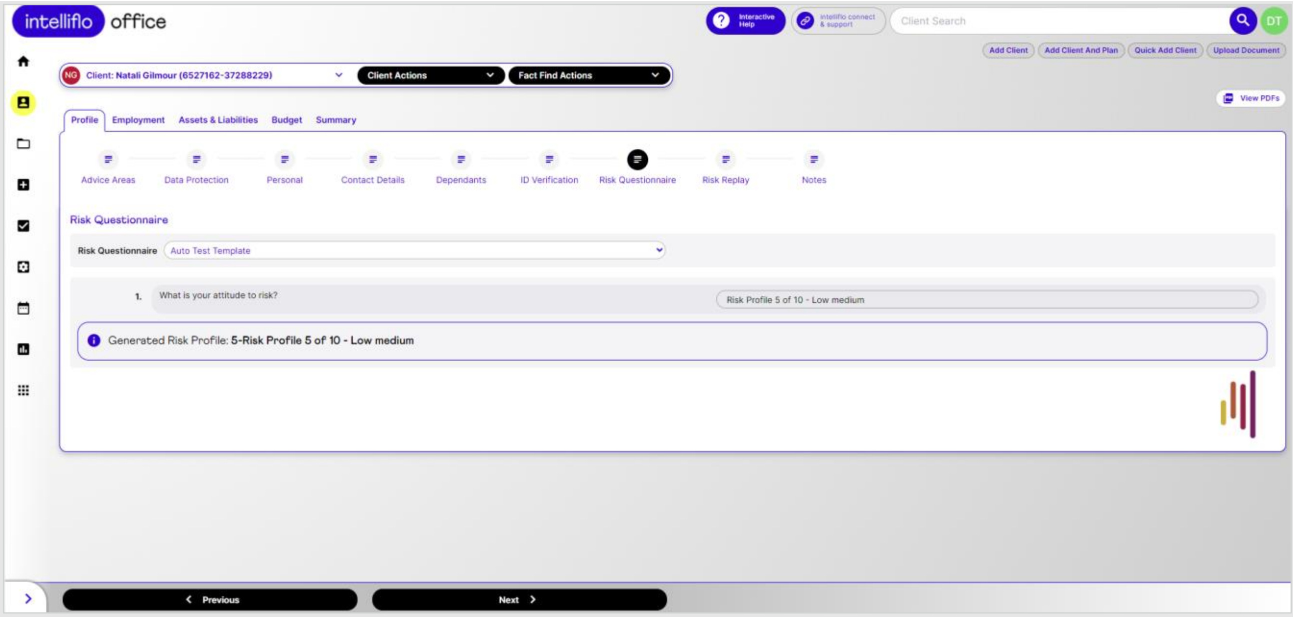
If you do not see the expenditure information within the client record in intelliflo office, change the answer to the question whether you want to update the Expenditure information from No to Yes.



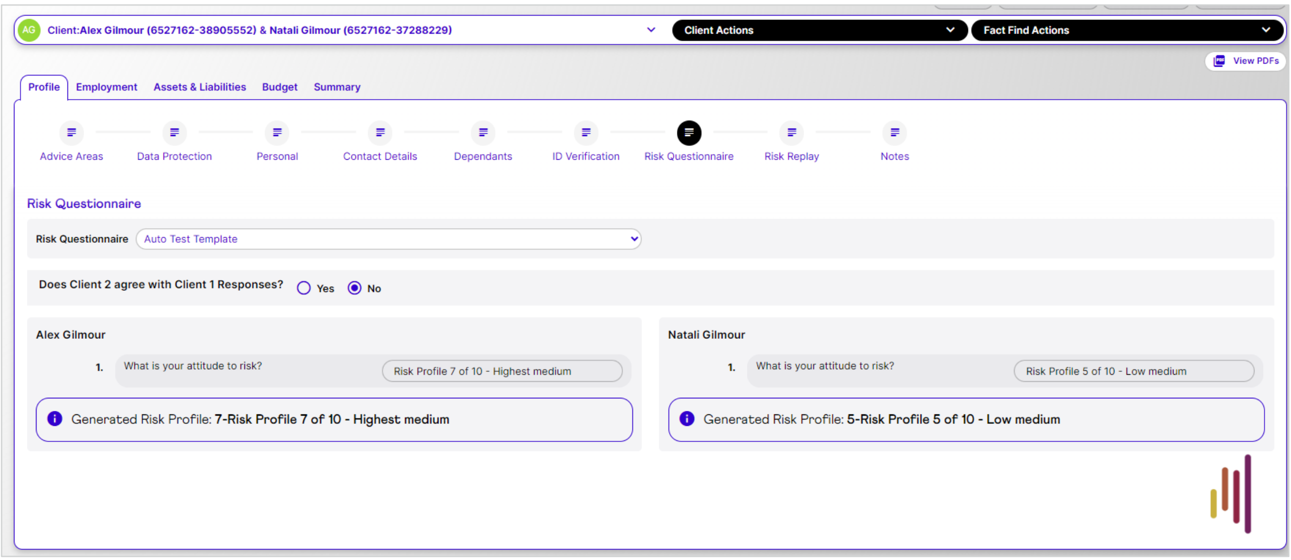
On future exports, any existing items will show the ability to update the item in intelliflo office.

To view the risk information in intelliflo office, go to Fact Find, then Risk Questionnaire. The Dynamic Planner ATR questionnaire should be there and your results will appear.

You will see on the Risk Questionnaire page the attitude to risk profile that the client scored when answering the questionnaire.

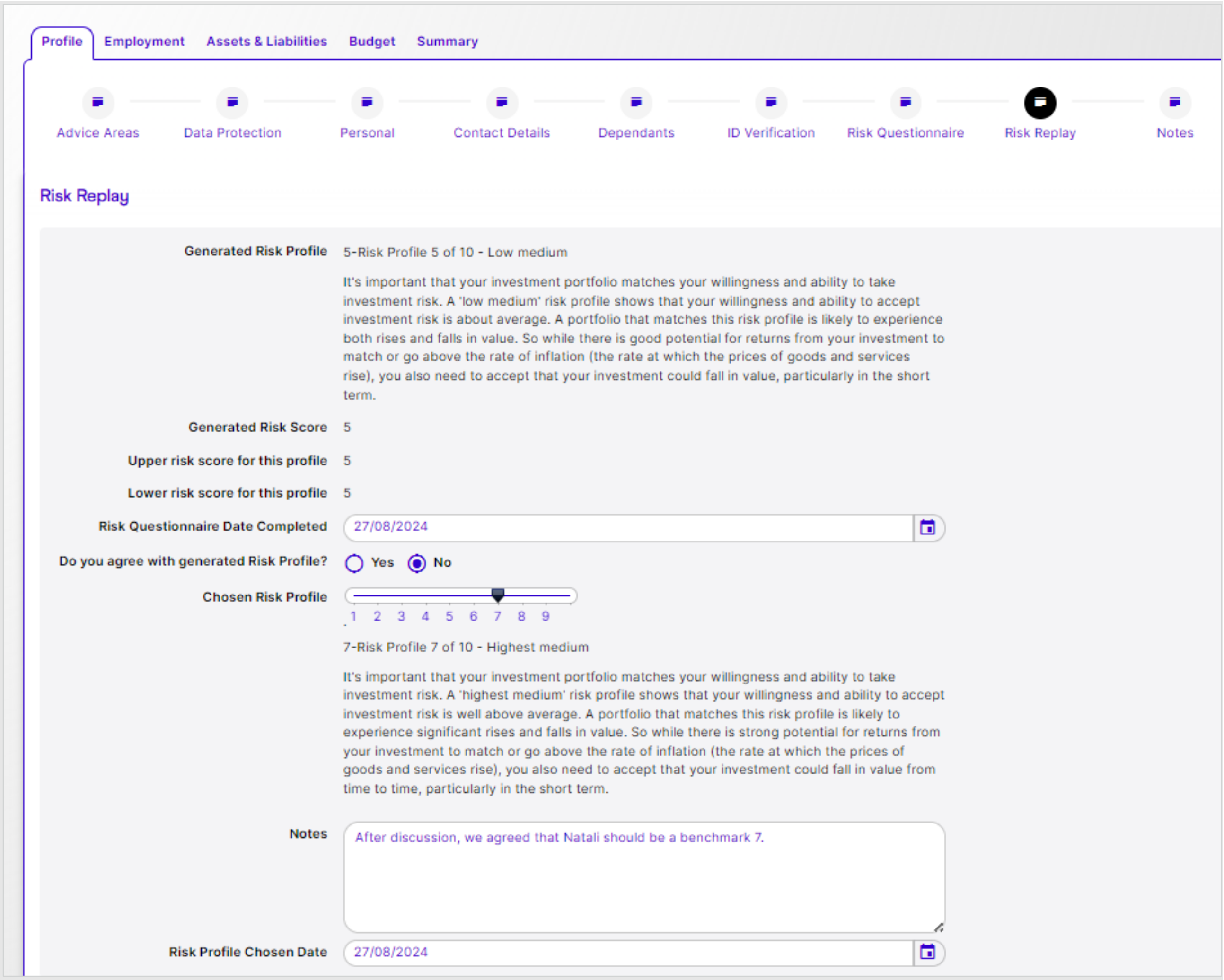


Where the client profiling has been carried out for joint clients, you will see both clients' attitude to risk profiles:

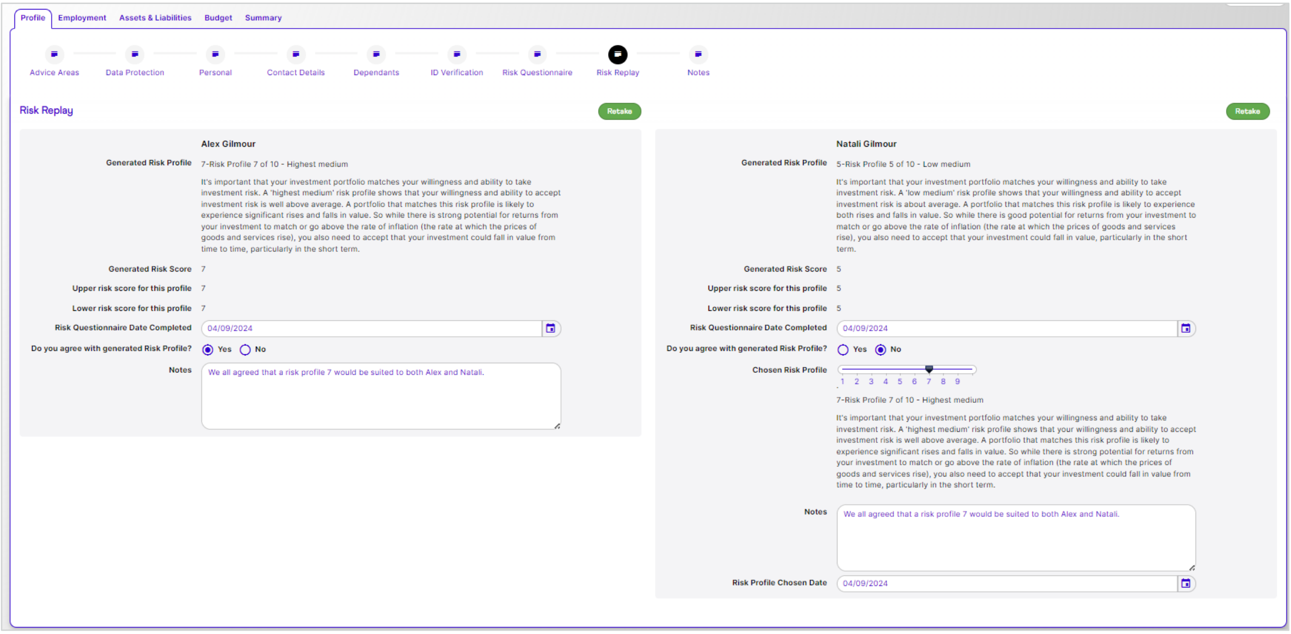


On the next page for Risk Replay, you will see the Generated Risk Profile as per the client's attitude to risk profile, the Dynamic Planner description for this risk profile and the data the questionnaire was completed.

Information further down the page will provide information on the agreed benchmark risk profile between the adviser and the client, and any notes added in Dynamic Planner. The date will be shown that the agreed benchmark was sent from Dynamic Planner to intelliflo office.



If joint clients were sent over to Dynamic Planner and their joint attitude to risk and benchmark was carried out, the page would display as follows:



Appendix – Supported Products

intelliflo office plan type	Dynamic Planner arrangement type
Appropriate Personal Pension	Appropriate Personal Pension
PIA (Non Protected Rights)	Appropriate Personal Pension
PIA (Protected Rights)	Appropriate Personal Pension
AVC	AVC
Alternatively Secured Pension Plan	Drawdown / Unsecured Pension
Third Way Pensions	Drawdown / Unsecured Pension
Unsecured Pension	Drawdown / Unsecured Pension
Flexible Benefits	Drawdown / Unsecured Pension
Income Drawdown (Beneficiary)	Drawdown / Unsecured Pension
Income Drawdown (Capped)	Drawdown / Unsecured Pension
Income Drawdown (Flexi-Access)	Drawdown / Unsecured Pension
Income Drawdown (Flexible)	Drawdown / Unsecured Pension
Pension Fund Withdrawal	Drawdown / Unsecured Pension
Phased Retirement	Drawdown / Unsecured Pension
Endowment	Endowment / Maximum investment plan
Maximum Investment Plan	Endowment / Maximum investment plan
Executive Pension Plan	Executive Pension Plan / Deferred SSAS
FSAVC	FSAVC
Group Offshore Pension Scheme	Group personal Pension
Group Personal Pension	Group personal Pension
Scheme Pension	Group personal Pension
Workplace Pension Scheme	Group personal Pension
Group Stakeholder Pension	Group Stakeholder Pension Plan
ISA (AIM)	Individual Savings Account
ISA (Cash)	Individual Savings Account
ISA (Help to Buy)	Individual Savings Account
ISA (Maxi)	Individual Savings Account
ISA (Maxi/Mini Transfer)	Individual Savings Account
ISA (Mini Cash)	Individual Savings Account
ISA (Mini Equity)	Individual Savings Account
ISA (NISA)	Individual Savings Account
ISA (Stocks And Shares)	Individual Savings Account
ISA (Tessa Only)	Individual Savings Account
Lifetime ISA (Cash)	Individual Savings Account
Lifetime ISA (Stocks And Shares)	Individual Savings Account
Structured Plan (Cash ISA)	Individual Savings Account

Cash Account	Investment account
Cash Deposit	Investment account
Collective Investment Account	Investment account
Discretionary Managed Service	Investment account
Enterprise Investment Scheme (Non-Regulated)	Investment account
Enterprise Investment Scheme (Regulated)	Investment account
Enterprise Investment Zone Trust	Investment account
Equity Holdings	Investment account
Exchange Traded Fund	Investment account
Friendly Society Savings	Investment account
Geared Investments	Investment account
General Investment Account	Investment account
Hedge Fund	Investment account
Investment Trust	Investment account
Non-Discretionary Managed Service	Investment account
OEIC / Unit Trust	Investment account
Offshore OEIC / Fund	Investment account
Offshore Regular Savings	Investment account
Personal Equity Plan	Investment account
Savings Account	Investment account
Seed Enterprise Investment Scheme (Non-Regulated)	Investment account
Seed Enterprise Investment Scheme (Regulated)	Investment account
Share Incentive Plan	Investment account
Share Save Scheme	Investment account
Structured Plan	Investment account
Structured Plan (Deposit)	Investment account
Unregulated Collective Investments	Investment account
Venture Capital Trust (Non-Regulated)	Investment account
Venture Capital Trust (Regulated)	Investment account
Guaranteed Growth Bond	Life assurance bond
Guaranteed Income Bond	Life assurance bond
Insurance / Investment Bond	Life assurance bond
Insurance / Investment Bond (Distribution)	Life assurance bond
Insurance / Investment Bond (With Profits)	Life assurance bond
CIMP	Occupational Money Purchase
CIMP & COMP	Occupational Money Purchase
COMP	Occupational Money Purchase
Money Purchase Contracted	Occupational Money Purchase
Offshore Bond	Offshore Bond

Offshore Deposit	Offshore Bond
Immediate Vesting Personal Pension (IVPP)	Personal Pension Plan
Individual Retirement Account	Personal Pension Plan
Master Trust Pension	Personal Pension Plan
Offshore Pension	Personal Pension Plan
Personal Pension Plan	Personal Pension Plan
SSAS	Personal Pension Plan
s226 RAC	Retirement Annuity Contract
s32 Buyout Bond	Section 32
Deferred SIPP	Self-Invested Personal Pension
Group SIPP	Self-Invested Personal Pension
SIPP	Self-Invested Personal Pension
Stakeholder Individual	Stakeholder Pension Plan

10 Error Messages / Troubleshooting

This list is not extensive but details the most common types of error you may come across in your use of this integration.

Client is under 18 years of age

Dynamic Planner does not support Clients under the age of 18. Date of birth is also a mandatory field within Dynamic Planner in order to create clients.

Only one client has come over instead of joint client

Both clients should be active. The Primary relationship will be used. Both clients should have the same adviser in both intelliflo office and Dynamic Planner.

My client exists in Dynamic Planner already but isn't matching with intelliflo office

If the client is on Dynamic Planner already, the name, date of birth and any National Insurance number entered must be identical in both systems to match. For example, the client is called Nick on Dynamic Planner, but Nicholas on intelliflo office, the match will fail. You should correct both systems so that they match and the integration will work.

I've recently moved from one intelliflo office tenant to another

We know that where firms are acquiring other businesses, they may have moved intelliflo office tenants to join the parent tenant. If you have recently moved to new intelliflo office tenant but did not make Dynamic Planner aware, duplicate clients will be created rather than finding the existing one. Please contact our Support Team so that we can discuss further.

Not all plans have come over

You should ensure that all policies are In Force. Any which are draft or not active will not come over into Dynamic Planner. You should also check that there is a plan number on intelliflo office. Check that there are no spaces at the beginning of the field if there is something entered. Did you use the correct link to send client data over to Dynamic Planner? There are 2 links available, one which is for basic client personal and contact details only.

Fund not recognised

The integration may not recognise the funds that have been entered in intelliflo office. An "Unmatched Holding" or a summary arrangement will be added in place of this. This can be easily overridden.

Dynamic Planner valuations are not up to date

Run the valuations in intelliflo office then push the data to Dynamic Planner. Dynamic Planner will show the valuations available in intelliflo office.

Something went wrong sending data to Dynamic Planner

There are over 1000 users each month who could be using the integration. At times there could be a momentary glitch due to the volume of traffic. Try to import the client again.

This can also happen when there are multiple issues with the data held for your client. Go through this guide to validate the information you hold on intelliflo office for your client.

The client's reports haven't appeared in intelliflo office

Refer to page 15 to ensure you have selected to download reports and also check whether the integration was used for the client from intelliflo office to Dynamic Planner in the first instance.

I can't see the expenditure I sent back in intelliflo office

Change the answer to the question in the Expenditure section 'Do you wish to carry out a detailed expenditure analysis?' from No to Yes. The data you sent from Dynamic Planner should appear. Follow on page 18.

I can't see the risk information in intelliflo office

Have you added the correct template within the administration area? Follow on page 18.

I cannot see the 2 options for sending information over to Dynamic Planner

If you can only see one link to Add to Dynamic Planner, uninstall the integration app then reinstall it again to view the new options to Import to Dynamic Planner.

11 Need further help?

If you require further help after checking the data and the integration still isn't working, contact Dynamic Planner's Support Team.

Call us: 0333 6000 500, option 1

Email: Support@DynamicPlanner.com

You may also need to raise a support case with intelliflo office. Please refer to their Support Portal to raise a support case.

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