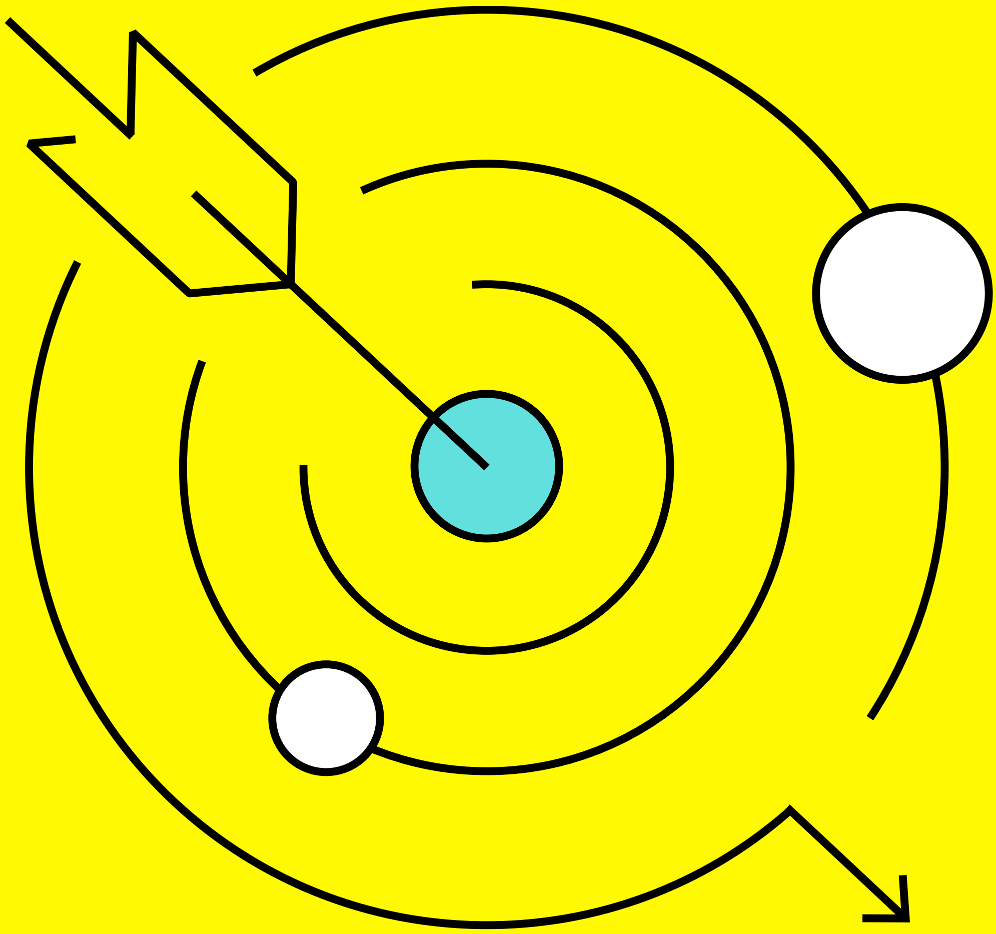

intelliflo planning

FAQs – for users of intelliflo office

intelliflo planning

Definitions

- **i4C** is the legacy application being decommissioned and where your data will be migrated from
- **intelliflo planning** is the new application and where your data will be migrated to

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Frequently Asked Questions

What will happen and when?

On the launch of intelliflo planning you'll be invited to install the new intelliflo planning app from within the intelliflo store. Following the launch, we'll agree timescales with you of when (and how) we'll migrate your data.

Once your firm's data has been migrated, all users should uninstall the legacy i4C app from the intelliflo store.

How do I install intelliflo planning?

intelliflo planning can be accessed via the intelliflo store. Simply click the app to install. **Your firm's administrator may have to approve the installation before it is available for you to use.**

Please refer to the integration guide on this landing page for further information.

When should I uninstall i4C?

We'll let you know when you should uninstall i4C, as it will need to be done as part of your firm's overall data migration process. When the time is right, i4C can easily be uninstalled from within the intelliflo store.

Will I still be able to access i4C when intelliflo planning launches?

Yes. For a period of at least one month after the launch of intelliflo planning you'll still have access to i4C. This will give you time to familiarise yourself with intelliflo planning and finish off existing client work in i4C.

Note: All new client work should be done in intelliflo planning as soon as possible.

You won't be charged for use of both applications. Billing will switch over from i4C to intelliflo planning following the migration of your data.

Will my risk profiles be moved, when?

Risk profiles will be migrated from i4C to intelliflo planning on the launch of the new application.

Important: *Changes to risk profiles in i4C after the launch of intelliflo planning will not be reflected into intelliflo planning.*

Do I need to do anything to support the data migration?

There are some data records that we cannot migrate without your support.

In April 2020 i4C released some new pension functionality. If you have clients in i4C that have not been opened since that date, then we'll need you to take a small action. But don't worry – we'll provide you with a list of any impacted clients and what to do ahead of your data migration.

When will my data be moved?

We'll communicate your data migration timings following the launch of intelliflo planning. You'll be provided with a minimum of one month before your data is migrated.

Important: *If you open a client into intelliflo planning before your firm's data is migrated, this client will not be migrated because the system assumes that this data supersedes the client data in i4C.*

If you would like us to migrate the data for a client you have opened prior to migration you can simply delete the imported client in intelliflo planning.

If I am running i4C and intelliflo planning, will I be billed twice?

You'll be billed for one app only, even in the period you are using both. Additionally, there are no changes to our standard pricing and no extra cost to you for installing the intelliflo planning app.

What has changed between i4C and planning?

Please refer to the 'What has changed' document, which can be found on this landing page, and in the Community.

The integration guide (also on this landing page) summaries how the new integration works, and what additional fields have been added to make the process more efficient.

How do I manage which clients I am able to see in intelliflo planning?

Access to clients is based on a combination of "Group Hierarchy" and "Roles". Please refer to the Community for more information on Group Hierarchy and how to assign a Role to a user.

The following roles/access can be assigned to a user:

“PlanningUser” Can only access client data they own, and any "public" data in their Group or below

“PlanningGroupUser” Can access client data they own data and any other clients owned by a user in the same Group or in a direct descendent group

“PlanningGroupAdmin” Can edit their Firm Level Assumptions at their Group level

When you install the intelliflo planning app you’ll be automatically assigned as a **“PlanningUser”**. The other two roles will need to be added by your firm administrator, as required.

How do I access the resource in the Community?

You can access the intelliflo Community from within intelliflo planning by clicking on the **Community and Support** tab. Here you can access various topics to help you use intelliflo planning as efficiently as possible. Historic i4C content will remain in place until the full migration is complete. You’ll also have access to interactive support within intelliflo planning.

Important: *You’ll no longer be able to access the Community via i4C following the launch of intelliflo planning.*

What support will I get through the adoption of intelliflo planning?

We'll be running a webinar to existing i4C customers ahead of the launch of intelliflo planning which will explain all the key changes, features and functionality improvements. If you miss it, we'll provide a recording link at a later date.

The Community has been updated with new content for intelliflo planning and will be continuously added to over the coming weeks to ensure you have the right resources available to you.

We'll also be adding an additional session of Cashflow hour at 10am every day, as well as the regular daily session at 2pm. It's completely informal, and a chance to drop in and ask a question, or just join us for a chat about all things cashflow.

Additionally, our new in-app support will assist you with interactive learning as you navigate your way through intelliflo planning.

Welcome to….

intelliflo planning

….you're going to love it!