



# Defaqto Engage Integration Guide

# Contents

Contents .....	2
Introduction.....	3
Linking Engage with Plannr.....	3
Launching Engage from Plannr .....	5
What gets executed back to Plannr?.....	6
Mapping wizard landing page .....	6
Product Type Mapping.....	7
Platform Mapping .....	10
Product Mapping .....	11
Fund Mapping.....	12
CIC products and CIC Compare .....	12
<b>Post Mapping Wizard .....</b>	<b>13</b>
New Business - Product Type Mapping.....	14
New Business - Product Provider Mapping.....	15

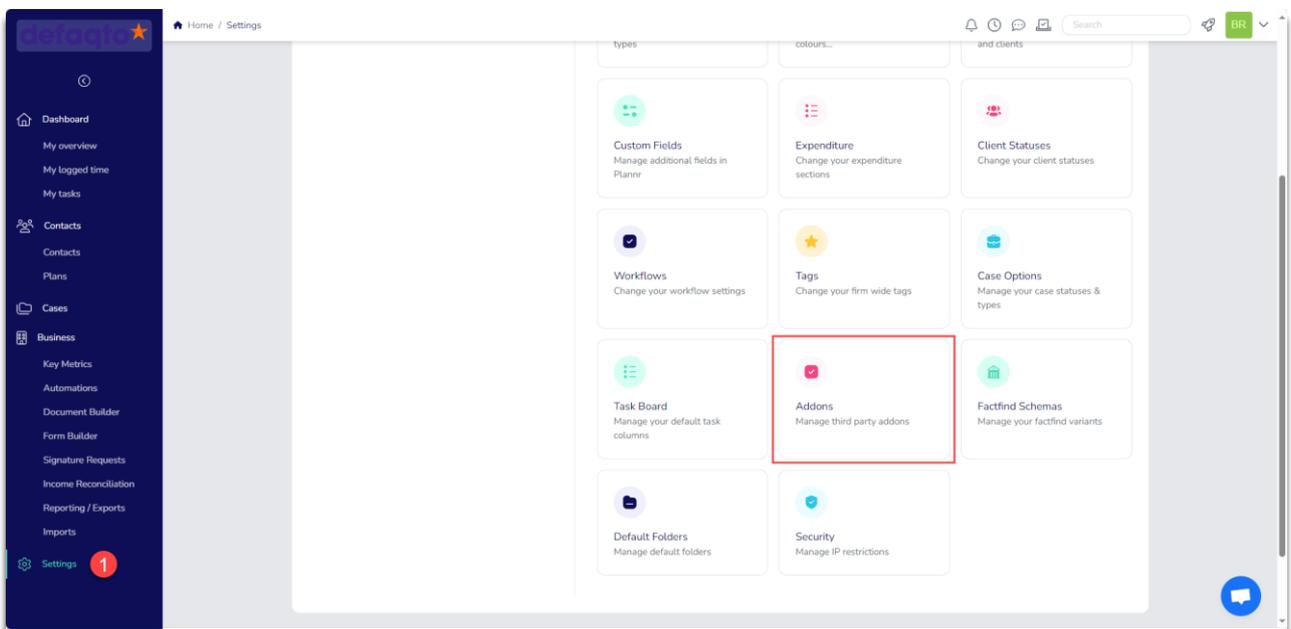
# Introduction

Defaqto Engage offers a full two-way integration with Plannr that allows users to automatically view and analyse their client's existing plans in Engage, and post products & documents back to Plannr.

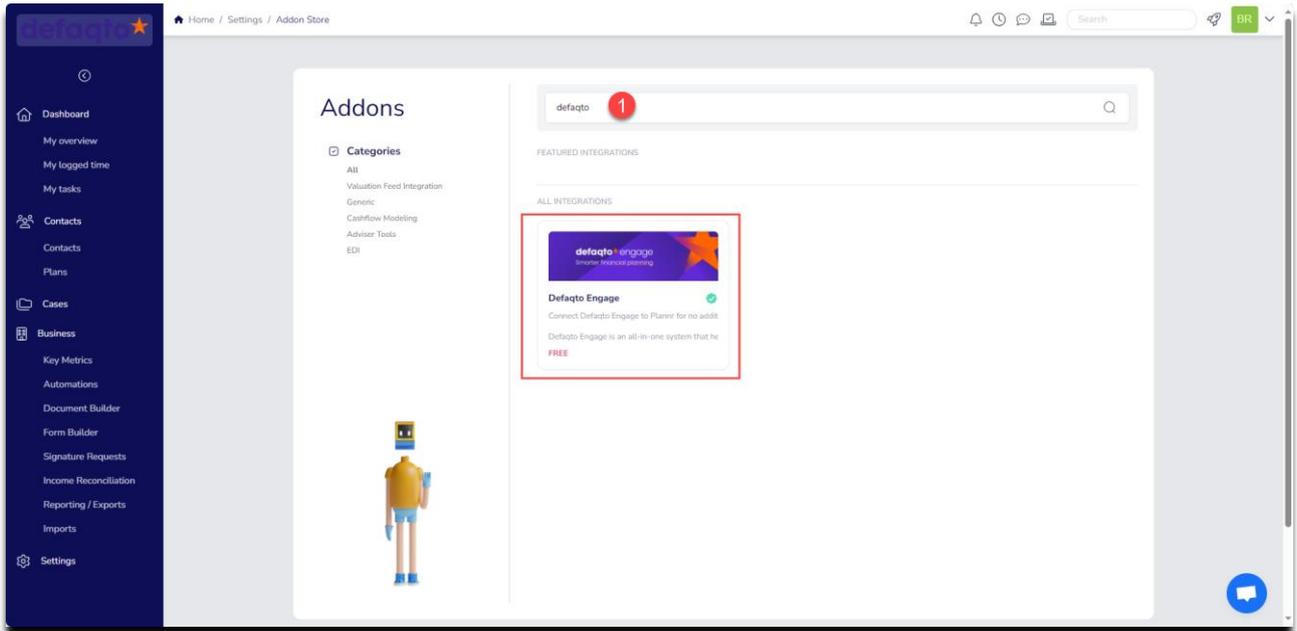
This guide explains how to set up and use the integration. If you have any further questions regarding the functionality highlighted within this guide, please contact Defaqto Customer Support by calling 01844 295544 or emailing [customersupport@defaqto.com](mailto:customersupport@defaqto.com).

## Linking Engage with Plannr

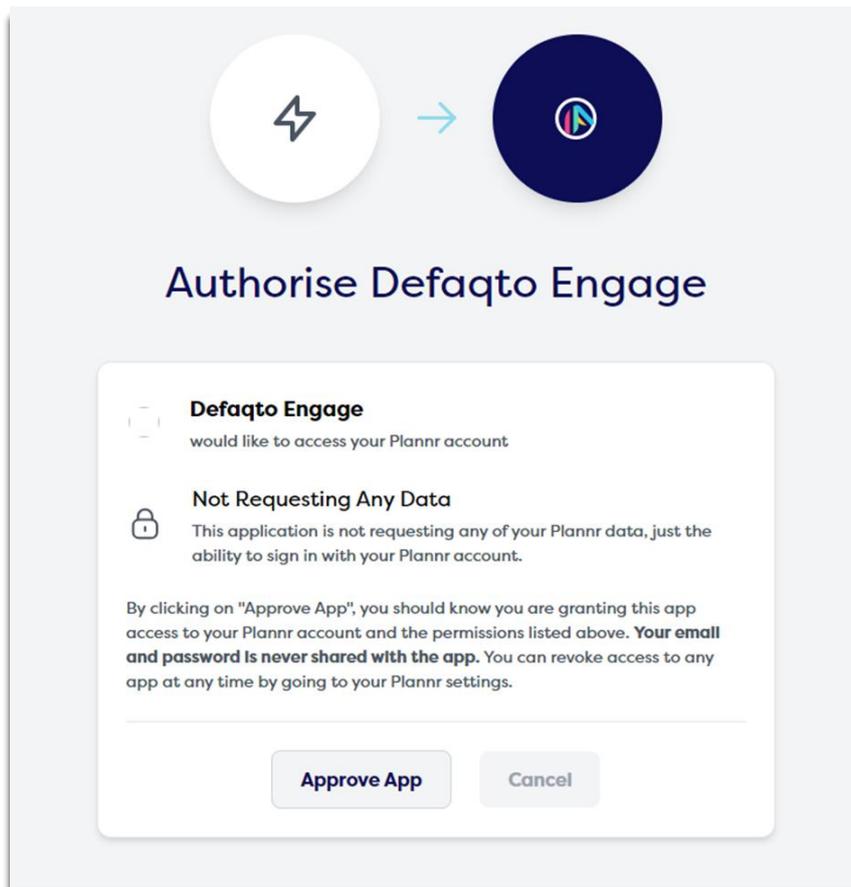
To link your Plannr account to an Engage licence, users need to install the Engage app.



To install the app, select **Settings** and then **Addons**.



By typing **Defaqto** into the Search bar, you can select and install the app.

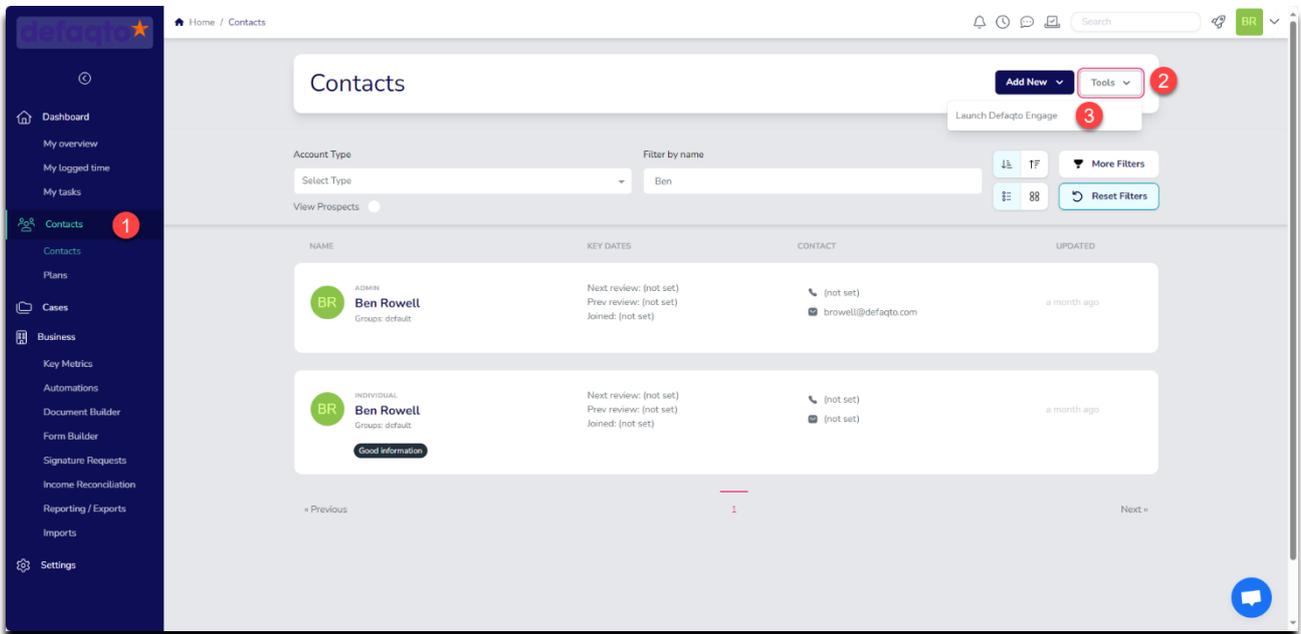


The software will then ask you to approve the app. Once the appropriate **Plannr** account has been selected, the link is set up and the user will land on the Engage dashboard.

*Note: Each Plannr user will need their own Engage licence.*

# Launching Engage from Plannr

To launch Engage from Plannr open either **Contacts** or **Plans** and use **Tools** to launch Defaqto Engage.



# What gets executed back to Plannr?

By executing research in Engage, the recommended product and platform will be posted back to the client's record within Plannr, alongside the following documents:

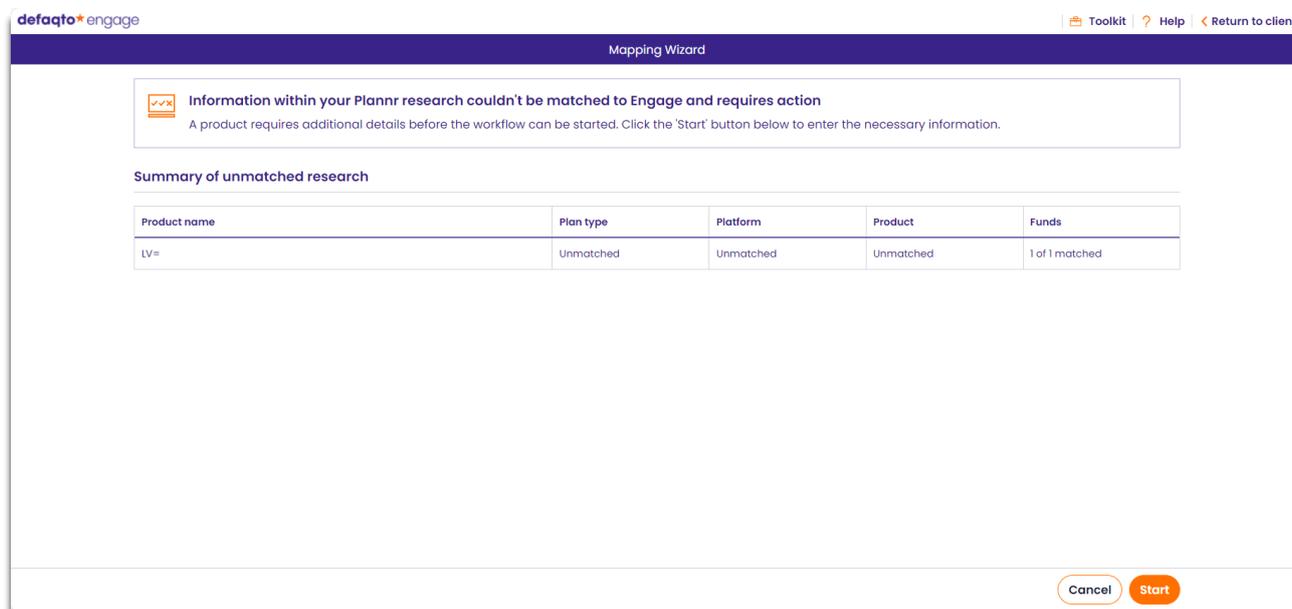
- Risk Profiles
- Client Research reports
- Income Drawdown reports
- Natural Income Profile reports
- Product Switching reports
- Suitability Reports
- KIID/PRIPs/Prospectuses/Fund factsheets

## Mapping wizard landing page

When launching the integration, a **Mapping Wizard** will appear. Engage needs to recognise and assign plans to the relevant product type in the software. The first screen in the **Mapping Wizard** provides users with a summary of any plan types the software is unable to recognise.

*Note – The Mapping Wizard can be cancelled at any time but any steps that have been completed prior to cancelling will be remembered by Engage.*

### Mapping Wizard - Landing



The screenshot shows the 'Mapping Wizard' landing page. At the top, there is a navigation bar with 'defaqto engage' on the left and 'Toolkit', 'Help', and 'Return to client' on the right. Below the navigation bar, there is a message box with a warning icon and the text: 'Information within your Plannr research couldn't be matched to Engage and requires action. A product requires additional details before the workflow can be started. Click the 'Start' button below to enter the necessary information.' Below this message, there is a section titled 'Summary of unmatched research' which contains a table with the following data:

Product name	Plan type	Platform	Product	Funds
LV=	Unmatched	Unmatched	Unmatched	1 of 1 matched

At the bottom right of the page, there are two buttons: 'Cancel' and 'Start'.

In the example above, the user will need to map the platform and the product.

## Product Type Mapping

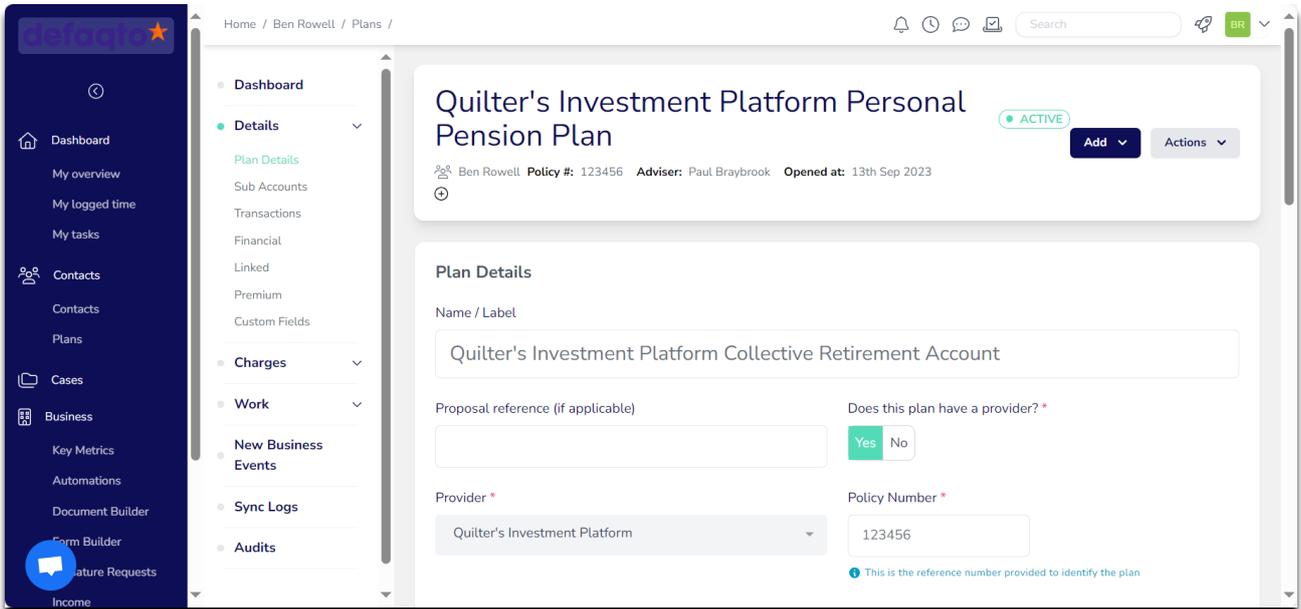
The below table shows how Plannr plan types can be mapped to product types in Engage:

Plannr Plan Types	Engage Mapping
Cash Account	Cash account
Cash Deposits	Cash account
ISA Cash	Cash ISA
Junior ISA Cash	Junior Investment ISA
Lifetime Cash ISA	Cash Lifetime ISA
ISA Stocks and Shares	Investment ISA
General Investment Account	Unwrapped/GIA
Wrap	Unwrapped/GIA
Investment Bond	Bonds
Onshore Bond	Bonds
Savings	Unit Linked Savings Plan
Structured Plan	Structured Product
Offshore Bond	International Bond
Capital Redemption Policy	International Bond
Personal Pension Plan	Personal Pension Plan
SIPP/SIPP Wrapper	SIPP
SASS	Small Self-Administered Schemes
Fixed Term Annuity	Fixed Term Annuity
Equity Release	Equity Release
Pension Fund Withdrawal	Income Drawdown
Stakeholder Individual	Individual Stakeholder
Deferred/Lifetime Annuity	Pension Annuity
Master Trust Pension	Workplace Pension
Group Stakeholder	Workplace Pension
Discretionary Managed Service	DFM Proposition

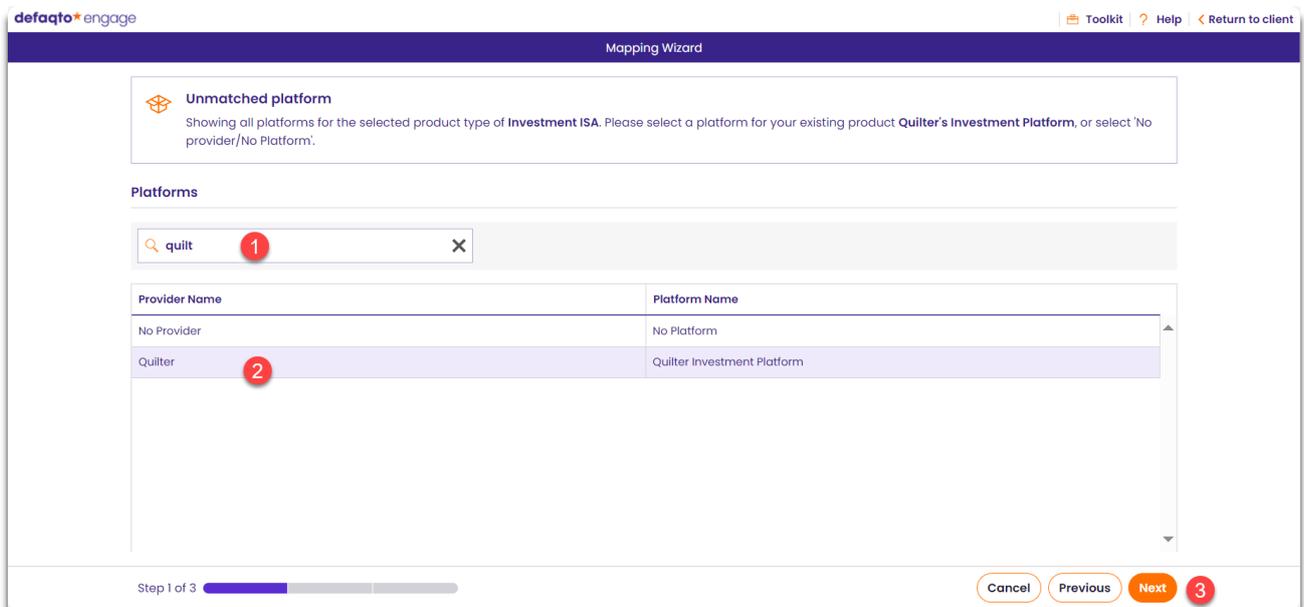
Term Protection Decreasing	Decreasing Term Assurance with CIC
Income Protection Executive	Executive IPI Plan
Term Protection Family Income Protection	Family Income Benefit Plan with CIC
Pre-Paid Funeral Plan	Funeral Plan (Pre-paid)
Term Protection Decreasing Term Life CI	Decreasing Term Assurance with CIC
Term Protection Mortgage Protection	Decreasing Term Assurance with CIC
Gift Inter Vivos	Gift Inter Vivos Plan
Multi Benefit Protection	Menu Plan

*Note - If the workflow does not support the selected product type, on completion of the wizard, Engage will not start the workflow, or remove the plan where multiple plans have been selected.*

## Mapping Wizard - Product Type



An **Investment Unknown** product type has been created in Plannr, which enables users to map Engage product types that are categorised under the grouping of **Investment**.



The product types categorised under **Investment** in Engage are also available in the **Mapping Wizard**.

In the example above, Engage recognises the plan and product type, so it can be assigned to one of listed product providers.

# Platform Mapping

The **Mapping Wizard** now enables the user to select a platform. The selected platform will then be automatically recommended when the user opens the subsequent research session.

If the plan does not use a platform, the user should select **No platform**, or if the user does not wish to map to a platform, they can simply press the **Next** button to move onto the next step.

## Mapping Wizard - Platform

defaqto engage Toolkit Help Return to client

Mapping Wizard

**Unmatched platform**  
Showing all platforms for the selected product type of **Investment ISA**. Please select a platform for your existing product **Optimum Credit**, or select 'No provider/No Platform'.

**Platforms**

No Provider	No Platform
7IM	7IM Platform
7IM	7IM Platform - Self Invest
abrdn	abrdn FundZone
abrdn	abrdn Wrap
abrdn	Elevate
Advance by Embark	Advance by Embark Platform
Aegon	Aegon Platform
Aegon	AEGON Retirement Choices (ARC)
AJ Bell	AJ Bell
AJ Bell Investcentre	Funds & Shares Service
Aviva	Aviva Online Investment Service
Aviva	Aviva Platform
Transact	Transact

Step 2 of 4 Cancel Previous **Next**

# Product Mapping

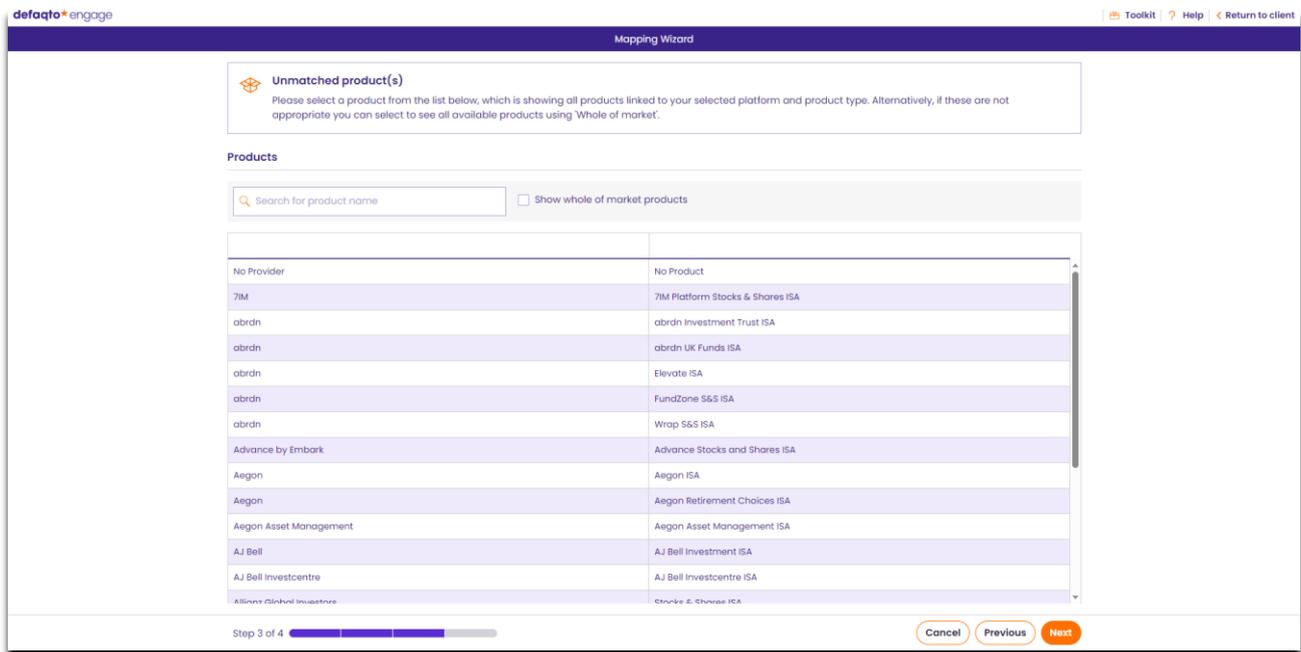
The **Mapping Wizard** also allows the user to select their client's product. Additionally, if the user has selected a platform on the previous step, then the list of products will be filtered down to only show those available on the selected platform.

If the selected plan is a legacy product, then the user can select the **Show whole of market products** tick box to show all the available products for selection.

The selected product will be automatically show as recommended when the user opens the subsequent research session.

Again, if the user does not want to undertake this step can simply select the **No product** option and/or press the **Next** button to move onto the next step.

## Mapping Wizard - Product

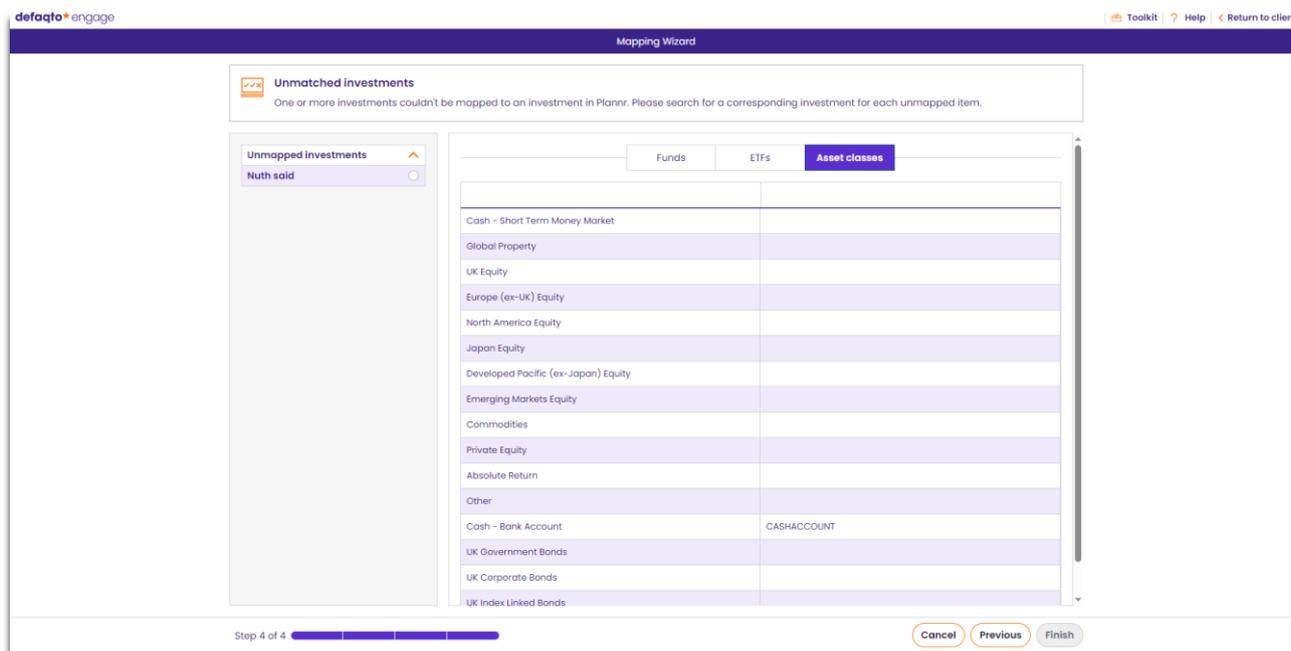


## Fund Mapping

Users have the option to manually assign ISINs to Investments held in Plannr. When the assigned ISIN matches an ISIN held in Engage, the funds will map automatically. When Engage is unable to recognise an ISIN, users need specify whether the investment is a fund, ETF, or a direct equity.

When mapping to a fund or ETF, the user can search for an investment that is known to Defaqto. When mapping a direct equity to an asset class, the user can pick from one of the sixteen Defaqto asset classes.

### Mapping Wizard - Equity mapping



## CIC products and CIC Compare

The **Mapping Wizard** also supports the identification of legacy products when the product type being reviewed is Critical Illness Cover (CIC). For the CIC Compare functionality to work, users must identify the original version of the product being reviewed, so upon finishing the mapping steps, the user must also then pick the legacy product version.

# Post Mapping Wizard

Once a research session has been completed and the recommended plan has been executed, the **Mapping Wizard** will once again load. The purpose of this wizard is to ensure that the selected recommendation maps to the correct plan type in Plannr. As not all platforms are available in Plannr, users only need to match plan types and product providers when sending details back to Engage.

The fund(s) records in Plannr are manually created, therefore there is no requirement to map fund(s) back to Engage.

The first step of the post **Mapping Wizard** is a landing page which tells the user what items require mapping prior to the details being sent to the back to Plannr.

## Post mapping wizard - Landing page

defaqto engage Toolkit Help Return to client

**Information within your Plannr research couldn't be matched to Engage and requires action**  
So that the outcome of your research can be posted to Plannr, please use the following screens to complete the mapping for each product

**Summary of unmatched research**

Product name	Plan type	Provider
Junior Investment ISA / Unnamed Research No goal	Unmatched	Unmatched

Cancel Next

## New Business - Product Type Mapping

When plan types have a one-to-one mapping between Engage and Plannr, the plan type will map automatically. When these are not directly mapped, the plan type in Plannr will need to be identified.

### Post Mapping Wizard - Plan type mapping

The screenshot shows a web-based wizard interface for plan type mapping. At the top left is the logo "defaqto engage". At the top right are links for "Toolkit", "Help", and "Return to client". A message box at the top center states: "The plan type for research Junior Investment ISA / Unnamed Research could not be mapped. Please select a corresponding product type from Plannr." Below this is a section titled "Plan type(s)" with a search bar. The search results show "Investment" selected, with two options listed below: "Junior ISA (Nisa)" and "Junior ISA (Stocks And Shares)". At the bottom left, it says "Step 1 of 2" with a progress bar. At the bottom right are buttons for "Cancel", "Previous", and "Next".

## New Business - Product Provider Mapping

When a piece of new business is sent to a Plannr, we need to ensure that the recommended product provider in Engage, matches a product provider known to Plannr.

The Plannr list of providers is searched to try and find the best matches based on the initial characters of the product provider in Engage. If no product providers are returned, the user can use the search bar to locate the required provider.

### Post Mapping Wizard - Product provider mapping

The screenshot shows the 'Post Mapping Wizard - Product provider mapping' interface. At the top left is the 'defaqto engage' logo. At the top right are links for 'Toolkit', 'Help', and 'Return to client'. A message box states: 'The selected product's provider **Aegon** couldn't be matched to a provider in Plannr. Please search for a product provider that would be a suitable match. Recommended product: Aegon Junior ISA. Recommended platform: Aegon'. Below this is a 'Providers' section with a search bar containing 'Aeg' and a search icon. Below the search bar, it says 'Showing 1 matches for "Aeg" in providers'. A table lists the results:

Provider Name
AEG Assurance

At the bottom left, it says 'Step 2 of 2' with a progress bar. At the bottom right are buttons for 'Cancel', 'Previous', and 'Finish'.