FINCALC plannr Integration Guide



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Introduction

This guide is specifically for Plannr Integrated FinCalc Users.

This guide will go through the process of setting up Plannr integration and explain how to use the 2-way integration.

How to link with Plannr

If you would like your company to be integrated with Plannr, please contact our FinCalc Client Services team who can arrange this for you. If you are a new user, and have received your welcome email to FinCalc, this will confirm that the integration is already in place.

Once your Plannr link has been enabled, you will need to input your Firm ID from Plannr into the FinCalc Settings.

Click 'Settings' in the left hand side bar, followed by 'Company Settings'. You can then select the 'Integrations' settings card.

On the Plannr API Integration card, you can enter your Firm ID for the integration:

| Plannr API Integration | ? |
|---|---|
| Firm ID | |
| Syncing with Plannr | |
| Two-way One-way from Plannr only | |
| Default to create financial items in Plannr | |
| Yes No | |
| Default to update financial items in Plannr | |
| Yes No Only update from Plannr | |
| Remove unlinked items from FinCalc | |
| Yes No | |
| Import goals | |
| Yes No | |

Your Plannr Firm UUID can be found in Settings within Plannr under Firm Details:



2- Preferences

Plannr Integration Guide

Once this has been set up you are also able to set up your company's preferences on the following:

Syncing with Plannr

When setting up these integrations you have the ability to select your companies sync method. The sync options available are Two-way or One-way from Plannr Only.

Two-way - If two way is selected all Client information will automatically sync with Plannr, therefore any changes in FinCalc will appear within Plannr. When loading the cashflow, this will sync with Plannr and import/update all relevant financial items. If two way is selected, you have two further options available to select your company defaults:

Default to create financial items in Plannr - Yes or No - This relates to when creating items in FinCalc, if your company wishes to set as default these will create in Plannr select 'Yes', alternatively if you wish to not automatically create in Plannr select 'No'. This can be overridden on each item, by going to the Plannr tab in individual items and amending this.

Default to update financial items in Plannr - Yes, No or Only update from Plannr - This relates to financial items that have been imported into FinCalc from Plannr. When editing a linked item, again if set to 'Yes', FinCalc will assume that it will update Plannr with any changes. However, you have more control over this and can either select 'No' which will not update the item or re-sync when the cashflow next syncs or select 'only from back office' which won't push any changes into Plannr but will still update on next sync. This can be overridden on each item, by going to Plannr tab in individual items and amending this.

One-way from Plannr Only- Force one-way ensures that Plannr data is NOT edited in any way. You are able to import Clients and Financial data, but changes made in FinCalc will not sync back to Plannr provider. This applies to both clients, financial data, and any items such as reports. This will lock down some inputs as you are unable to create, delete or update items in Plannr.

Remove unlinked items from FinCalc – If on sync there are items no longer valid to pull into FinCalc, for example they are set as transferred or deleted, you can choose whether FinCalc tidies the Cashflow up automatically by deleting these items. Otherwise, these will remain in FinCalc, you will however get a warning confirmed the items and they will be unlinked from Plannr.

Import goals – The Goals added in Plannr seamlessly import to the cashflow modeller. These will pull through as expenses and will be shown on the expenditure screen. If you do not wish to import the Plannr goals, you can set this option to No.

Once your Company is a Plannr Integrated FinCalc User, and you enable the integration, select to Import a client, or reset the back-office link you will see the following:

| 🚯 plannr | | |
|-------------------------|-----------------------|--|
| Sign in to your account | | |
| Email address | | |
| Password | | |
| Remember | Forgot your password? | |
| | Sign In | |

You will need to provide your Plannr login details, and upon clicking Sign in the link will be enabled.

You will then see the following authorisation message to approve the access to Plannr:

| GS FinCalc would like to access your Plannr account Image: Second state of the second | Authorise FinCalc | | | | |
|--|---|--|--|--|--|
| Your entire Plannr account Read and write data within your Plannr account By clicking on "Approve App", you should know you are granting this app access to your Plannr account and the permissions listed above. Your end and password Is never shared with the app. You can revoke access to an app at any time by going to your Plannr settings. | GS FI | InCalc ould like to access your Plannr account | | | |
| and password is never shared with the app. You can revoke access to an app at any time by going to your Plannr settings. | Your entire Plannr account Read and write data within your Plannr account By clicking on "Approve App", you should know you are granting this app access to your Plannr account and the permissions listed above. Your email | | | | |
| | and password I app at any time | s never shared with the app. You can revoke access to any by going to your Plannr settings. | | | |
| Approve App Cancel | | Approve App Cancel | | | |

User Settings

When you click to 'Import' a new client, FinCalc will prompt you to log in to Plannr and enable the back-office link.

Once you have you link with Plannr within your settings you will see two options:

| Back Office Sync Active link with Plannr. | Reset |
|--|---------|
| Disable Back Office Link Disable your back office link. | Disable |

The first one will confirm whether you have an active link or not. If you do not have an active link the Reset button will show as 'Enable'. If you are getting any error messages confirming that the link is unavailable, it is best to refer to this setting and reset your link.

You can disable your link with the Back Office at any time, this will stop all syncing on both clients and financial data.

Please note, if you do disable your back office and make changes to FinCalc, the data will be 'Out of Sync' and you will have to review the changes before activating your link.

Clients

Importing Clients into FinCalc

Once the integration has been activated, you can (1) import any Plannr clients into FinCalc (2) link existing FinCalc clients to their records in Plannr or (3) create FinCalc clients in Plannr.

To import a client, select the 😐 button within the client section. This will take you to input a new

client, however a new button will appear at the top of this screen. Pressing this button will take you to a search screen as illustrated below:

| Client Import from Plannr | | |
|---------------------------|-----------------|-----------------------------|
| Client Surname | Client Forename | National Insurance Number |
| Client Reference | Postcode | Date of Birth dd/mm/yyyy |
| Search Reset | | |

Simply enter the details for the client you wish to import and press 'Search'. The Clients that match your criteria will appear underneath the search options as hyperlinks.

Select the client you wish to import, and this will take you straight into their new Client Profile. To show that this client is linked to Plannr you can see this 🏠 icon next to their name on the Client

Profile and on any client search. Within the Client Profile you will also see this button which opens their record in Plannr.

If your Plannr client had another Client in their fact find, this record will be automatically imported at the same time, and they will be set as their financial relation in FinCalc. This can be seen under the relationships section in the FinCalc client profile.

At this point FinCalc is pre-populated with the following information (if it is entered within Plannr):

- Full Name
- Gender
- Date of Birth
- Marital Status
- NI Number
- Retirement Age
- Address

Please note, FinCalc requires First Name, Surname, Gender, and Date of Birth to create a client. You will see a warning message confirming what else is required in Plannr if any of these details are missing.

You can see this information by selecting the button. You are also able to input any of the information we could not find or was not entered into Plannr.

If at any point you wish to unlink this client, within the edit screen is this button. Simply select this to remove the future link. If you edit any of the details while linked, these will be pushed back to Plannr when you select the 'Continue' button at the bottom of the screen.

Launch FinCalc from Plannr

Rather than importing your client as above, a seamless way to sync your full client's details between the two platforms is using the launch button in Plannr.

When working in a client record in Plannr you can launch FinCalc at the press of a button and are automatically logged in with your FinCalc credentials.



You will be taken directly to the client's record in FinCalc and, where no record exists, it will create one for you, using all of the data already gathered in Plannr. This includes a partner record where applicable, the client's income, all plans, expenditure etc.

You can also use the Launch FinCalc option to launch an existing client in FinCalc, again seamlessly logging you into FinCalc directly from your Plannr input screen.

To enable this feature go to your settings within Plannr and select Addons. From the next screen, search for FinCalc and then enable. You should now be able to launch FinCalc from Plannr.

Linking/Exporting FinCalc Clients to Plannr

If you already have clients added within FinCalc and wish to either link these to existing clients in Plannr or create new clients in Plannr, simply go into their client profile on FinCalc and select this

① Link button.

You will need to ensure that the client has an adviser set on their client profile, and this adviser will need to match the adviser in the back office. If no adviser is set on FinCalc, the client will not be created in the back office.

| Search for Client in Plannr | | | | | |
|-----------------------------|----------------------|---------------|---------------------------|---------------------------|------------|
| Client Surname | Client Forename | | National Insurance Number | | |
| Jones | | | | | |
| Client Reference | Postcode | | Date of Birth | | |
| | | | dd/mm/yyyy | | |
| Search Reset (2) Create | | | | | |
| 0 records match | | | | | |
| Show 10 🗸 entries | | | | | |
| Client Name | Client Reference | Date of Birth | | National Insurance Number | |
| | No data available in | table | | | |
| Showing 0 to 0 of 0 entries | | | | Pre | vious Next |

This will take you to a search screen as below:

Here you can enter the criteria to link to an existing Plannr client or select Create to create the client in Plannr.

This will automatically link or create the client to Plannr, and you are now able to view them in

Plannr by selecting the ^{Open} button.

Cashflow Data

Importing Cashflow Items

Once your clients have an Plannr link and when you launch the Cashflow, FinCalc will automatically retrieve any data you have saved within Plannr and prepopulate items in FinCalc Cashflow.

FinCalc will pull through the following (please see limitations appendix for full details):

- Incomes
- Assets
- Liabilities
- **Defined Benefit Plans**
- **Defined Contributions Plans**
- Pensions in Payments
- Savings and Investment Plans
- Expenses (including Life Assurance)

Please note you will not be able to open a Cashflow if only one of the clients within the Cashflow is linked to the Back Office system. Due to the ability to add Joint items in both systems we do require both clients to be linked.

If this is the first sync with Plannr, please review the data that has been imported. Due to the data that is able to be pulled through, it may leave blank fields in some required fields. If you go to the results tab in FinCalc the warnings will indicate the items that require a review and amendment.

If an item is linked to the back office, you will see this 🏠 icon on the bottom right of the card within the Cashflow or on the Client Finances element of the Client Profile.

Syncing automatically happens on load of Cashflow; however you have the option to turn off this automatic sync by selecting the edit button the Basic Details screen.

When you launch the Cashflow Modeller you will be taken to the Basic Details screen. On here, under Cashflow Settings, you will see the logo for your chosen back office provider, when the cashflow modeller was last synced, and the sync method for your back office. An example of this can be seen below:



Cashflow synced with Plannr Last synced: Wed 05 Feb 10:01am Sync method: Automatic. 🥒

Selecting the pencil button will allow you to manage the sync with the back office, and take you to a pop up screen with various options:

Manage sync with Plannr

| Cashflow sync method | I | |
|----------------------|-------------|-------------------------|
| Automatic sync | Manual sync | Remove all Plannr links |

Automatic cashflow sync will automatically import/update from Plannr when opening this cashflow. This will also switch all items currently set to 'Only update from Plannr' to sync with Plannr.

You are able to override individual items to update where applicable.



What is 'Automatic Sync'?

If your Clients are linked with a back office provider, each time you open the Cashflow Modeller FinCalc will do a call with the back office provider and pull in the data for the Clients and their financial information. This is an automatic process and will happen if your company opts for either two way or one way syncing from back office only. This is to ensure that you are always seeing and using the most up to date valuations and data.

Automatic cashflow sync will automatically import and update from your chosen back office when the Cashflow is opened. This will set each item to update from your back office, however you are able to override this on each individual item where applicable.

We understand that sometimes the automatic sync can cause active cashflows to amend frequently depending on how your back office is set up and used. Therefore there is functionality within FinCalc where you can turn off this automatic sync for specific Cashflows.

What is 'Manual Sync'?

Essentially this is confirming that all items which would previously be updated in your back office from editing within FinCalc will now stop doing this, however this can be amended on individual items if required. Manual cashflow sync will stop importing and updating from your back office automatically when opening this cashflow. This will also switch all items set to sync with back office to 'Only update from back office'.

You are able to override individual items to update where applicable, or manually sync from your back office from the 'Actions' button. When you open the Cashflow Model after turning this off, you will still see a sync screen however this will only ensure the Client data is correct and not any financial items.

What is 'Remove all Back Office links'?

You may have imported your client from the back office, but now do not wish to retain any link to the back office. This is where you can use the Remove all back office link options. When this is selected, this will remove ALL links between the back office and this cashflow client and financial items. A note will appear on screen confirming that if the client is relinked to the back office at a later date, any financial items previously imported will be re-imported as new duplicate items.

To remove the back office link you will need to add a confirmation code and confirm that you are happy to do this.

Linking, Updating and Exporting Cashflow Items

If you amend any of these items a new panel at the bottom of the edit page will appear. This question will be different depending on what state the item is in, either:

Creating a new item in FinCalc - The card will appear (see to the right) asking if you would like this item to be created in Plannr. Please note that we are not able to create all items in Plannr. If this is the case, 'No' will be selected and disabled. Full details will appear in the Limitations section.

Create in Plannr?



Editing an item linked to Plannr - The panel will confirm this item is linked and whether you would like to update Plannr with any changes made. As per below:

| Plannr Link | 🕑 Open |
|--|--------|
| Update Plannr with changes made here ③ | |
| Exclude from FinCalc | |

If **'Yes'** is selected, this will retain a two-way link for the selected item. Any changes made in FinCalc will be updated in your back office, and anytime the Cashflow is sync'd, any updates in your back office will be pulled into FinCalc. This option will be disabled if your Company is set to 'Force one-way only' or has FINPLAN enabled.

If **'No'** is selected, this turns off the sync for this item. Updates made in FinCalc will remain in FinCalc only, and updates from the back office will not overwrite this data. This essentially turns off the active sync for this item.

If 'Only update from [Backoffice name]' is selected this will not send any updates from FinCalc, however if changes are made in the back office, this will overwrite the data in FinCalc on the next sync. This is essentially a one-way integration from your back office.

If **'Exclude from FinCalc'** is selected, this will ignore that item in FinCalc. The item will be greyed out and disabled and you will see this will move to the bottom of the input summary screen. This item will not be used in the Cashflow calculations and not show within the report. The item will also not be included on any other tools or calculators when you select the 'Use Client Finances' button.

Editing an item not linked to Plannr - The panel will confirm the item is not currently linked and whether you would like to create this item within Plannr. As per below:

| Yes | No |
|-----|----|
| | |

Not Linked to Plannr - Create in Plannr?

If the item is linked to Plannr you will also see this Plannr on a new tab. Please note, a limitation of this is if the item is only available through the Fact find you will be directed to the first page of the fact find. Please also note if you are making amendments while both records are open ensure you keep both screens refreshed/sync'd to see the amendments.

Existing FinCalc items

If your client has existing FinCalc items within the Cashflow these **WILL NOT** automatically be created in Plannr.

You are able to create these in Plannr by either going into each item and selecting 'Yes' to the new input of 'Create in Plannr' or select the **Actions** button on any input screen and select **Create in Plannr**.

This will bring you to a new page (as per below) listing all the existing items with the ability to select which items to create in Plannr.

| The following items have been created in FinCalc but not Synced to Plannr. Please select the items you wish to create in Plannr. | | | |
|--|--------------|-------|---------------------------------|
| Available Items | | | |
| Туре | Description | Owner | Do you want to create in Plann? |
| Assets | Holiday Home | James | Yes No |
| Savings | GIA | James | Yes No |
| | | | |
| Continue | cel | | |

Selecting 'Yes' will push all selected items into Plannr and create the Back Office link.

Please note, if you have items on FinCalc and Plannr, at the point of linking the client to Plannr we are unable to link existing FinCalc items to existing Plannr items. This is due to the parameters we are provided. Therefore, duplicates may appear, and it is worth reviewing the data retrieved from Plannr and deleting any Unlinked duplicates within FinCalc.

Out of Sync

There are some rare occasions that FinCalc may be updated without an active link to Plannr, and this may cause some items to be 'Out of Sync'.

The most common occasion will be if you turn off automatic sync or if your link with Back Office has been disabled or expired. Anything updated during this period will not automatically be updated in Plannr. If an item is out of sync this icon will turn an orange shade.

For these items you will have the option to **'Keep FinCalc Changes'** which will update Plannr with the information on FinCalc, **'Replace with Plannr'** which will override the changes made in FinCalc with the data in Plannr and **'Turn off link to Plannr'** which will leave the FinCalc amendments and turn **'Linked to Plannr- Update Plannr with changes made here?'** to NO.

If you wish to review the changes before you update the Back Office, we recommend you select 'Turn off link to Plannr'. You can then go into the item ensuring you agree with the amendments and can simply change 'Linked to Plannr - Update Plannr with changes made here?' to YES.

Deleting Linked Cashflow Items

You can delete any item within the Cashflow, whether this is Linked to Plannr or not. Simply select the 'Delete' button at the bottom right of any edit screen.

If the item is linked, the following pop-up will appear. It is worth noting that if an item is on Plannr



Uploading Reports

You can upload any report in FinCalc to Plannr. Once you have produced a report in FinCalc you will

see **Upload to Plannr** on the report preview screen in the left-hand side bar.

Pressing this will automatically upload the report to Plannr within the WORK Section under 'Documents'.

You can also upload any report from the Client Profile section of FinCalc on the reports archive

screen. If a report has not been uploaded, you will see this button.

Pressing this will automatically upload the report to Plannr.

Notes, Assumptions & Limitations

Clients

- To sync the client to the back office we require an adviser that exists in both FinCalc and Plannr to be set. Please note, we require an exact match between the FinCalc log in email address and the advisers email address in back office. If you are seeing a red warning message saying that the adviser does not exist or if the email address differs, please contact FinCalc Support.
- Tax Area is determined by the postcode.
- FinCalc will pull through both clients in Plannr if either of the joint clients are selected.
- If the clients are not set as joint clients in Plannr then you will only be able to pull through one client at a time and then relate them within FinCalc. Upon setting up a joint plan for these clients within the Cashflow that is to be synced back to Plannr, a joint client account will be created in Plannr.
- When importing the Address from Plannr we use joint account and then fallback to the client.
- For Mobile/Email in Plannr, we ignore the joint account and use client specific details and only use the primary values.
- FinCalc will use the marital status of partner in Plannr to set the relationship. Updating in FinCalc does not update Plannr. If no relationship set FinCalc will default to 'in a household'.
- If a FinCalc client is created within Plannr, their Financial Relation is automatically created as well.

Incomes

- If there is a joint salary in Plannr, this will not be created in FinCalc.
- If an Income is mapped to a pension in payment/future state pension, these will appear on both the income screen and the pension screen (*please see Pensions in Payment for further details*).
- You cannot set a Start Date in Plannr, therefore FinCalc will assume Current.
- If Frequency in FinCalc is Every 2 years, Every 3 years or Every 5 years, the item cannot be created or synced back to Plannr.
- In Plannr, if income is Gross and is not taxable then we map to Other Income non-taxable in FinCalc.
- In Plannr, if income is Net and is taxable then we map as Other Income non-taxable in FinCalc.
- In Plannr, if income is Net and is not taxable then we map as Other Income non-taxable in FinCalc.
- We cannot link an income to an asset in Plannr.
- FinCalc cannot update an Owner in Plannr. Please amend this in Plannr.

Assets

- FinCalc will only pull through Assets with a Status of Active.
- It is assumed if an Asset has multiple owners, each own equal shares.
- If an Asset is linked to an income or liability, we cannot retain this link in Plannr.
- We are unable to Create any Asset Improvements or Asset Disposals on Plannr.
- FinCalc cannot update an Owner in Plannr. Please amend this in Plannr.
- If an Asset has multiple valuations in Plannr, FinCalc will be able to pull through the most recent value.
- Future asset purchases in FinCalc will not be created in Plannr.

Liabilities

- FinCalc will only pull through Liabilities with a Status of Active.
- If Product Provider or Policy number is not entered in FinCalc these will be created in Plannr as Unknown.
- It is assumed if a Liability has multiple owners, each own equal shares of the debt and the repayments.
- The opened at date will be used as the starting date, the ending date is based on the term type. If the term type is blank FinCalc will assume forever.
- FinCalc cannot update an Owner in Plannr. Please amend this in Plannr.
- Future liabilities in FinCalc will not be created in Plannr.

Liability Repayments

- FinCalc will only pull through one liability repayment but cannot update or create from FinCalc.
- It is assumed if a Liability has repayments they are for the remaining term of the Liability, however this can be amended within FinCalc but not updated in Plannr.

Expenses

- We cannot create expenses in Plannr. Unfortunately, due to the Life stages set as per the Company we are unable to create any expenses in Plannr.
- Expenses imported from Plannr will be created as monthly expense starting and ending at Client1's Birthday (of the relevant life stage ages).
- FinCalc will only update the amount in Plannr. We are unable to update the Description, Owner, Frequency, Starting or Ending.

Life Assurance

- We are only mapping from Protection Policy Plan Type in Plannr to FinCalc. General Insurance and Group Protection are not mapped from or to Plannr.
- The owner of the Plan is set as the owner of the Life assurance in FinCalc.
- The sum assured amount is set as the benefit amount of an active, life assurance under Cover Types. If there are multiple Life Assurances the most recently updated amount will be used.
- The starting and ending for this policy will be driven from the Premium. The premium imported will be the current premium which has a starting date before today and an ending date after today. If the starting or ending is not set it will assume current and forever accordingly.
- When creating a Life Assurance from FinCalc, we have to set Provider and Policy number to unknown.

Savings & Investments Accounts

- FinCalc will only pull through Plans with a Status of Active.
- Any joint investments in Plannr that are not supported in FinCalc will not be created.
- If Product Provider or Policy number is not entered in FinCalc these will be created in Plannr as Unknown.
- We do not import any charges or future growth assumptions. Please ensure this data is reviewed and amended accordingly.
- FinCalc cannot update an Owner in Plannr. Please amend this in Plannr.
- FinCalc's default bank account cannot be created in Plannr.

Savings Contributions

- FinCalc only maps the Plannr transaction type of Contributions.
- We are unable to export Realised Gains or Bed and ISA transactions.
- FinCalc uses sub type Other on create from FinCalc.

Savings Withdrawals

- FinCalc only maps the Plannr transaction type of Withdrawals.
- FinCalc uses sub type Other on create from FinCalc.
- We are unable to create percentage withdrawals from FinCalc to Plannr as this option does not exist in Plannr.

Defined Benefit Pensions

- FinCalc will only pull through Plans with a Status of Active.
- Active and Deferred Defined Benefit schemes in FinCalc will map to pension type Defined Benefit Pension in Plannr.
- We are unable to create Transvas Linked Pensions in Plannr. However, if this item is already in Plannr this will import as a Defined Benefit Plan, and you are able to amend the Pension type to Defined Benefit (Transvas Linked). Doing so will turn off any future updates.
- The link does not currently provide normal retirement age.
- We do not import any assumptions or Scheme factors. Please ensure this data is reviewed and amended accordingly.
- The death benefit option within FinCalc of 'Multiple of Pension' cannot be mapped into Plannr.
- FinCalc cannot update the Pension Type or Owner in Plannr. Please amend Owner and Pension Type in Plannr.
- If Product Provider or Policy number is not entered in FinCalc these will be created in Plannr as Unknown.

Defined Contribution Pensions

- FinCalc will only pull through Plans with a Status of Active.
- If Product Provider or Policy number is not entered in FinCalc these will be created in Plannr as Unknown.
- We do not import any assumptions or Charges. Please ensure this data is reviewed and amended accordingly.
- FinCalc cannot update an Owner in Plannr. Please amend this in Plannr.

Pension Contributions

- We are unable to create percentage pension contributions from FinCalc as this option does not exist in Plannr.
- If any Start date is blank in Plannr, FinCalc will assume Current.
- If any End date is blank in Plannr, FinCalc will assume Forever.
- If the End date for a contribution is in the past, it will not be created in FinCalc.
- If Frequency in FinCalc is Every 2 years, Every 3 years or Every 5 years, the item cannot be created or synced back to Plannr.

Pension Withdrawals

- Pension withdrawals created from Plannr will be treated at Flexible Access Drawdown income only.
- Tax-free cash withdrawals in FinCalc cannot be created in Plannr.
- Lifetime Annuity, Charges and UFPLS withdrawals not currently mapped from FinCalc.
- We are unable to create percentage withdrawals from FinCalc to Plannr as this option does not exist in Plannr.

Pensions In Payment

- If there is a joint annuity in Plannr, this will not be created in FinCalc.
- Pensions in Payment in FinCalc are created from type Annuity in Plannr.
- All Pension in Payment items within FinCalc will be created as type Annuity in Plannr but defined using the plan type.
- A State Pension in Payment cannot be mapped from FinCalc to Plannr.
- If Frequency in FinCalc is Every 2 years, Every 3 years or Every 5 years, the item cannot be created or synced back to Plannr.
- FinCalc cannot update an Owner in Plannr. Please amend this in Plannr.

Other

- Deleting an item in Plannr which is linked to FinCalc, will only delete the item in FinCalc, if the 'Remove unlinked items from FinCalc' setting is selected. Otherwise, in FinCalc the item will no longer have a back-office link however, it will remain until you delete it.
- Deleting in FinCalc will not delete an item in Plannr unless you select 'Delete in FinCalc AND Plannr'. If you only select 'Delete in FinCalc', this item will be pulled though again when you next load the Cashflow.
- Plannr have a frequency of 'Daily'. This is not currently supported in FinCalc and any item with this frequency will not be created in FinCalc.
- If you have any custom fields in Plannr, we are unable to sync to these. Therefore a warning message will appear in the bottom right hand corner of your screen confirming this.