

What can someone in a Modeller Journey Override role see and do?

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This role is for users that are allowed to define the Modeller journey taken in each goal i.e. depart from the default set at the organisation.

The administrator will have to tick the 'Modeller Journey Override' box.

User login	Licenses	Roles assigned
	<input checked="" type="checkbox"/> Clients <input checked="" type="checkbox"/> Comparator <input checked="" type="checkbox"/> ContractEnquiry <input checked="" type="checkbox"/> Illustration <input checked="" type="checkbox"/> Modeller <input checked="" type="checkbox"/> PortfolioBuilder <input checked="" type="checkbox"/> TradeChartTool <input checked="" type="checkbox"/> WebSite	<input checked="" type="checkbox"/> Administration <input checked="" type="checkbox"/> Corporate User <input checked="" type="checkbox"/> EMP Administrator <input checked="" type="checkbox"/> Investment Analyst <input checked="" type="checkbox"/> Modeller Journey <input checked="" type="checkbox"/> Programmer <input checked="" type="checkbox"/> EMP User
druserone	<input checked="" type="checkbox"/> Clients <input checked="" type="checkbox"/> Comparator <input checked="" type="checkbox"/> ContractEnquiry <input checked="" type="checkbox"/> Illustration <input checked="" type="checkbox"/> Modeller <input checked="" type="checkbox"/> PortfolioBuilder <input checked="" type="checkbox"/> TradeChartTool <input checked="" type="checkbox"/> WebSite	<input checked="" type="checkbox"/> Administration <input checked="" type="checkbox"/> Corporate User <input checked="" type="checkbox"/> EMP Administrator <input checked="" type="checkbox"/> Investment Analyst <input checked="" type="checkbox"/> Modeller Journey <input checked="" type="checkbox"/> Programmer <input checked="" type="checkbox"/> EMP User
EmpPD	<input checked="" type="checkbox"/> Clients <input checked="" type="checkbox"/> Comparator <input checked="" type="checkbox"/> ContractEnquiry <input checked="" type="checkbox"/> Illustration <input checked="" type="checkbox"/> Modeller <input checked="" type="checkbox"/> PortfolioBuilder <input checked="" type="checkbox"/> TradeChartTool <input checked="" type="checkbox"/> WebSite	<input checked="" type="checkbox"/> Administration <input checked="" type="checkbox"/> Corporate User <input checked="" type="checkbox"/> EMP Administrator <input checked="" type="checkbox"/> Investment Analyst <input checked="" type="checkbox"/> Modeller Journey <input checked="" type="checkbox"/> Programmer <input checked="" type="checkbox"/> EMP User

This will allow the user to make their own selection at the 10k screen as shown below:

Manually Set your Attitude to Risk to:

You have manually set your Attitude to Risk to Balanced for this goal.

Description of Balanced Attitude to Risk
Balanced investors do not particularly regard themselves as cautious people and have no strong positive or negative associations with the notion of taking risk. They will typically have some experience of investment and a degree of understanding of investment matters. They will usually make investment decisions reasonably quickly and don't tend to be particularly anxious about investment decisions they have made. They can be inclined to look for safer investments rather than higher returns, but understand that investment risk may be required to achieve their goals. They are not particularly comfortable with investing in the stockmarket and get more comfort from bank deposits than fixed interest.

- Use the default asset allocation defined for this attitude to risk
- Use an asset allocation derived from the portfolio: No portfolio selected [Change](#)
- Use an asset allocation derived from the fund: No fund selected [Change](#)

Client's Comfort Percentage
How certain do you want to be of achieving your goal in terms of a percentage?
 %

Client's Capacity for Loss
 Enter monetary value Enter percentage value
Please enter the amount of money the client can afford (if able) to lose in any one year assuming a total investment of £10,000:

Asset Allocation

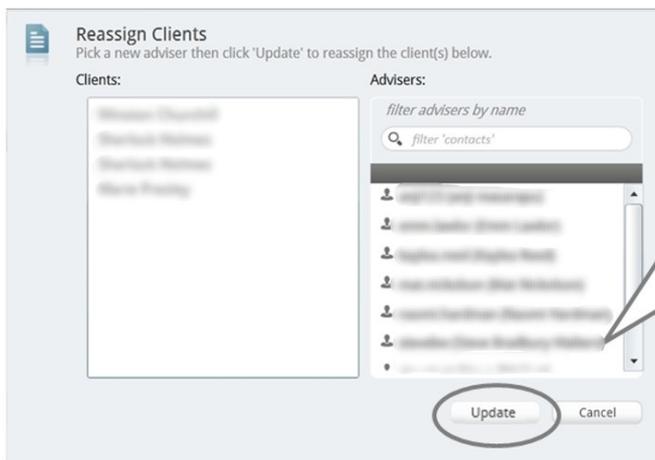
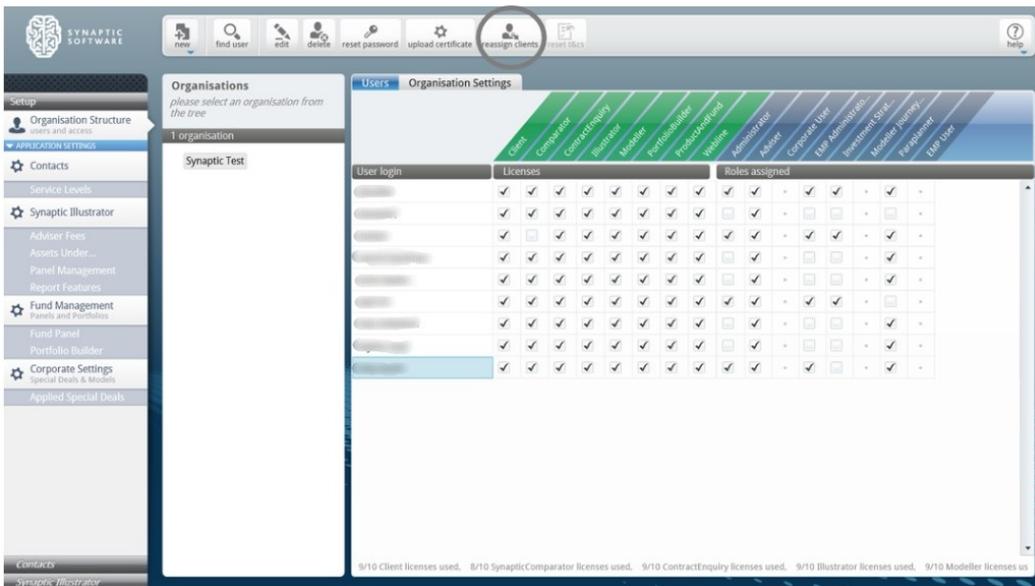
Growth Projection

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NB The administrator must ensure that they make the correct selection regarding the use of the Modeller Override Journey. Enabling this option allows the users to define their own modelling journey despite the parent organisation's settings.

It is possible to assign clients between advisers that work within your organisations. This might be useful if an adviser has left the company.

To reassign clients, click on the organisation and the user whose clients need to be reassigned, then click the **reassign clients** button in the ribbon bar.



Once the user has been selected, the administrator will be able to see all the clients for that user. Make the selection of the adviser reassigned and click on **update**.

If reassigning clients, when the selection is made, the software will reassign all clients under that adviser and will search every user with an adviser role within the organisation including below and above it as well.

An adviser can reassign clients individually, please see the *“Synaptic Client User Guide”* for further details.