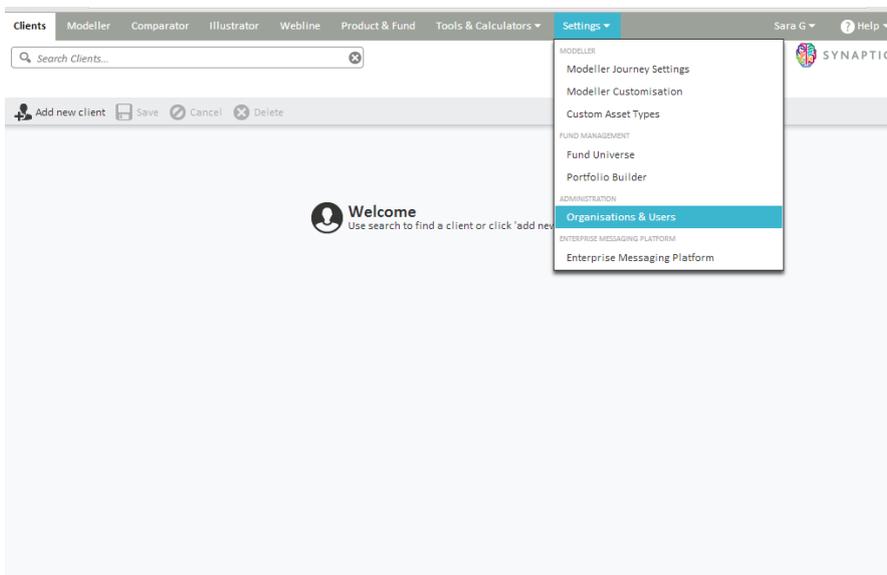


# How do I setup Modeller Journey Override and Fund Based Journey?

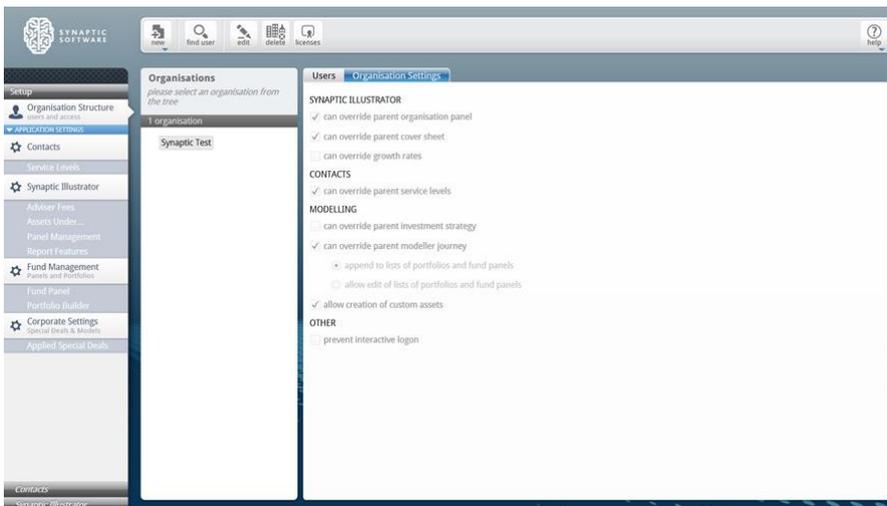
Last Modified on 20/06/2017 10:29 am BST

The first thing the user needs to do to initiate the set up for their Fund Based Journey is to access the settings tab from the Synaptic Welcome screen.

Select the **Organisations and Users** option from the drop down menu, they will be taken to the **Set up** screen for their organisation.



Select the organisation and click on the organisations settings tab at the top of the screen.



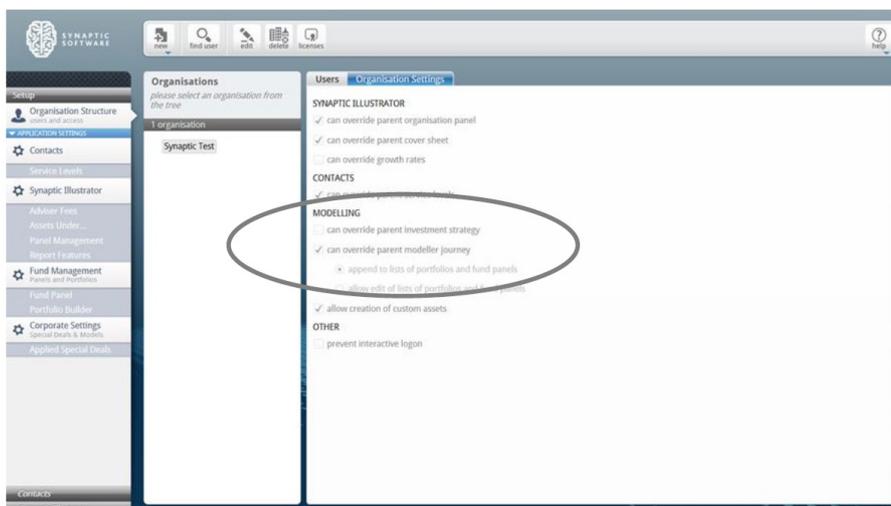
The administrator of the child organisation will only need to tick the option ‘can override parent modeller journey’ and then make the selection from the options below if the administrator wants to change the investment strategy for their organisation otherwise they will automatically inherit the investment strategy which has been set up by the administrator in their parent organisation.

On the screen above there will be the option to select the radio buttons to enable the administrator to append or edit lists of portfolios and fund panels.

↴ “Append to lists of portfolios and fund panels” means that the user can add additional funds to existing portfolio/fund panels. This however can only be completed within Portfolio Builder. Please see section 6.2 of this guide for further information.

↴ “Edit lists of portfolios and fund panels” means that the user can delete and add funds to existing portfolios/Fund panels.

**NB** If the **administrator** does not make a selection of edit or append here, it will default to append.



Once the administrator has made a selection, if applicable then exit this screen.

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