

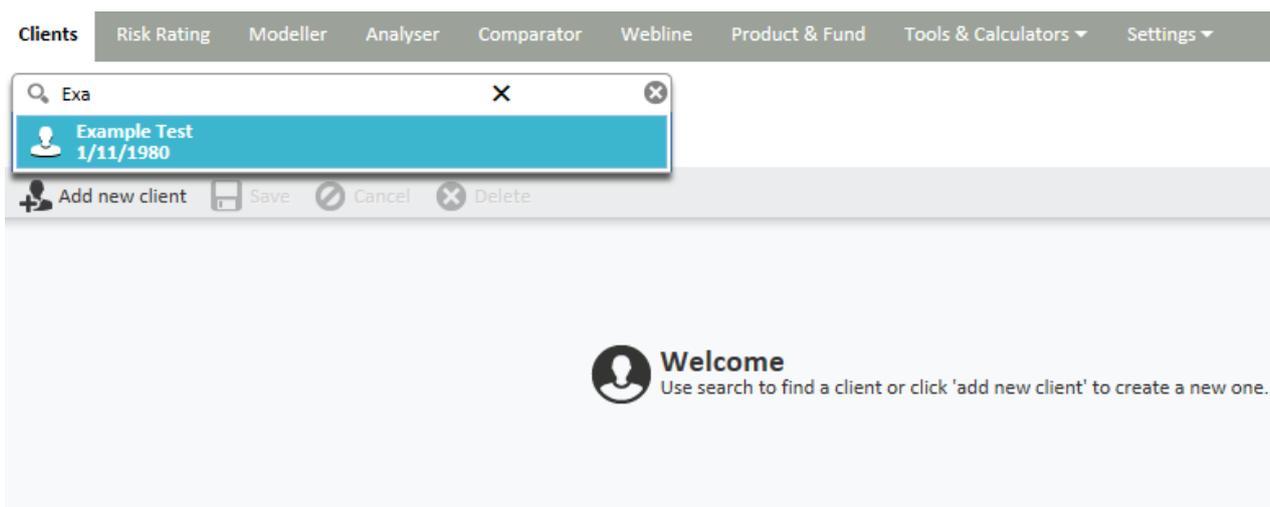
Finding an Existing Client

Last Modified on 23/11/2017 11:08 am GMT

If a client has already been saved in Modeller, they can be retrieved using the **Search Clients** field below the main tabs bar.



Start by typing in the forename or surname of the client who needs to be found:



The clients that match your search will be displayed in a drop down list. Simply select the relevant client and you will be taken to their client details screen where you can view previously recorded goals and create new goals:

Clients Risk Rating Modeller Analyser Comparator Weblime Product & Fund Tools & Calculators Settings

Example Test

Add new client Save Cancel Delete

Personal Details

Holdings

Income Sources

Accumulation Goals

Retirement Income Goals

Title: Mr

Name: Example

Address: Test Road

Postcode: AAA 123

Date of Birth: 01/11/1980

Sex: Male Female

Smoker: Yes No

Occupation: Baker

Home:

Office:

Mobile:

Email:

Salary £:

Service Level: Platinum

Attitude to Risk: **Balanced** Edit... Report

External identifier:

If you are in an existing client screen and wish to search for a new client you will be presented with the following message:

Save Changes? ✕

You have unsaved client changes. Click Discard to discard the changes or Cancel to stay on this page and continue editing.

Discard Cancel

Select either to Discard or Cancel to carry on.