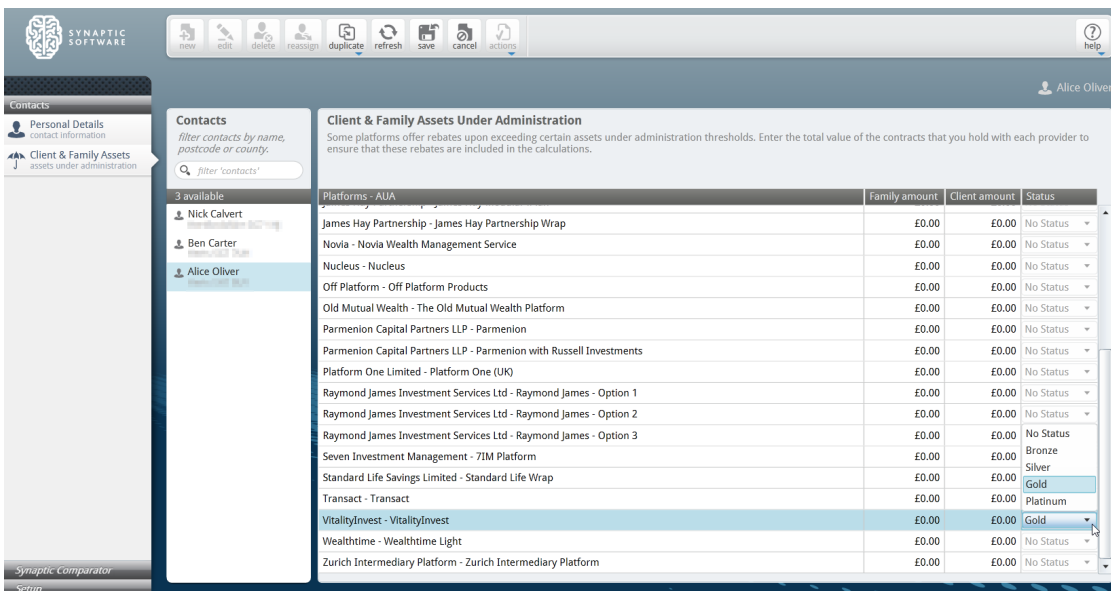


Setting Vitality Client Status within Comparator

Last Modified on 17/12/2018 3:27 pm GMT

With the release of Vitality products within Comparator, a Client Status has been added to the Client and Family Asset area, so that a Client's Vitality Status can be set. By setting this it will ensure that the correct charges are being applied in relation to the Client's Vitality Status.

To set the client status, navigate to **Contacts > Client and Family Assets > Double click on the client name to edit the details > Scroll to Vitality and set the status from the dropdown:**



The screenshot displays the Synaptic Software interface. On the left, there is a sidebar with 'Contacts' and 'Client & Family Assets' sections. The main area shows a table titled 'Client & Family Assets Under Administration'. The table has columns for 'Platforms - AUA', 'Family amount', 'Client amount', and 'Status'. The 'VitalityInvest - VitalityInvest' row is highlighted, and its 'Status' dropdown menu is open, showing options: No Status, Bronze, Silver, Gold, Platinum, and No Status. The 'Gold' option is selected.

Platforms - AUA	Family amount	Client amount	Status
James Hay Partnership - James Hay Partnership Wrap	£0.00	£0.00	No Status
Novia - Novia Wealth Management Service	£0.00	£0.00	No Status
Nucleus - Nucleus	£0.00	£0.00	No Status
Off Platform - Off Platform Products	£0.00	£0.00	No Status
Old Mutual Wealth - The Old Mutual Wealth Platform	£0.00	£0.00	No Status
Parmenton Capital Partners LLP - Parmenton	£0.00	£0.00	No Status
Parmenton Capital Partners LLP - Parmenton with Russell Investments	£0.00	£0.00	No Status
Platform One Limited - Platform One (UK)	£0.00	£0.00	No Status
Raymond James Investment Services Ltd - Raymond James - Option 1	£0.00	£0.00	No Status
Raymond James Investment Services Ltd - Raymond James - Option 2	£0.00	£0.00	No Status
Raymond James Investment Services Ltd - Raymond James - Option 3	£0.00	£0.00	No Status
Seven Investment Management - 7IM Platform	£0.00	£0.00	Bronze
Standard Life Savings Limited - Standard Life Wrap	£0.00	£0.00	Silver
Transact - Transact	£0.00	£0.00	Gold
VitalityInvest - VitalityInvest	£0.00	£0.00	Platinum
Wealthtime - Wealthtime Light	£0.00	£0.00	No Status
Zurich Intermediary Platform - Zurich Intermediary Platform	£0.00	£0.00	No Status

Once set, click Save within the top toolbar.