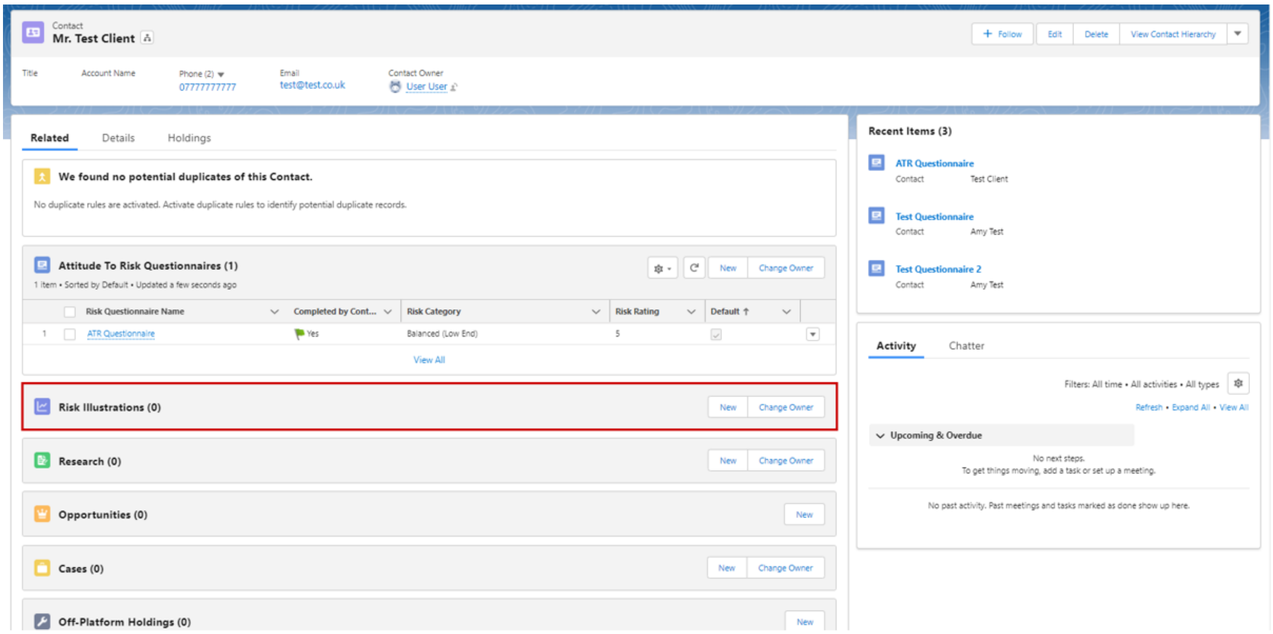
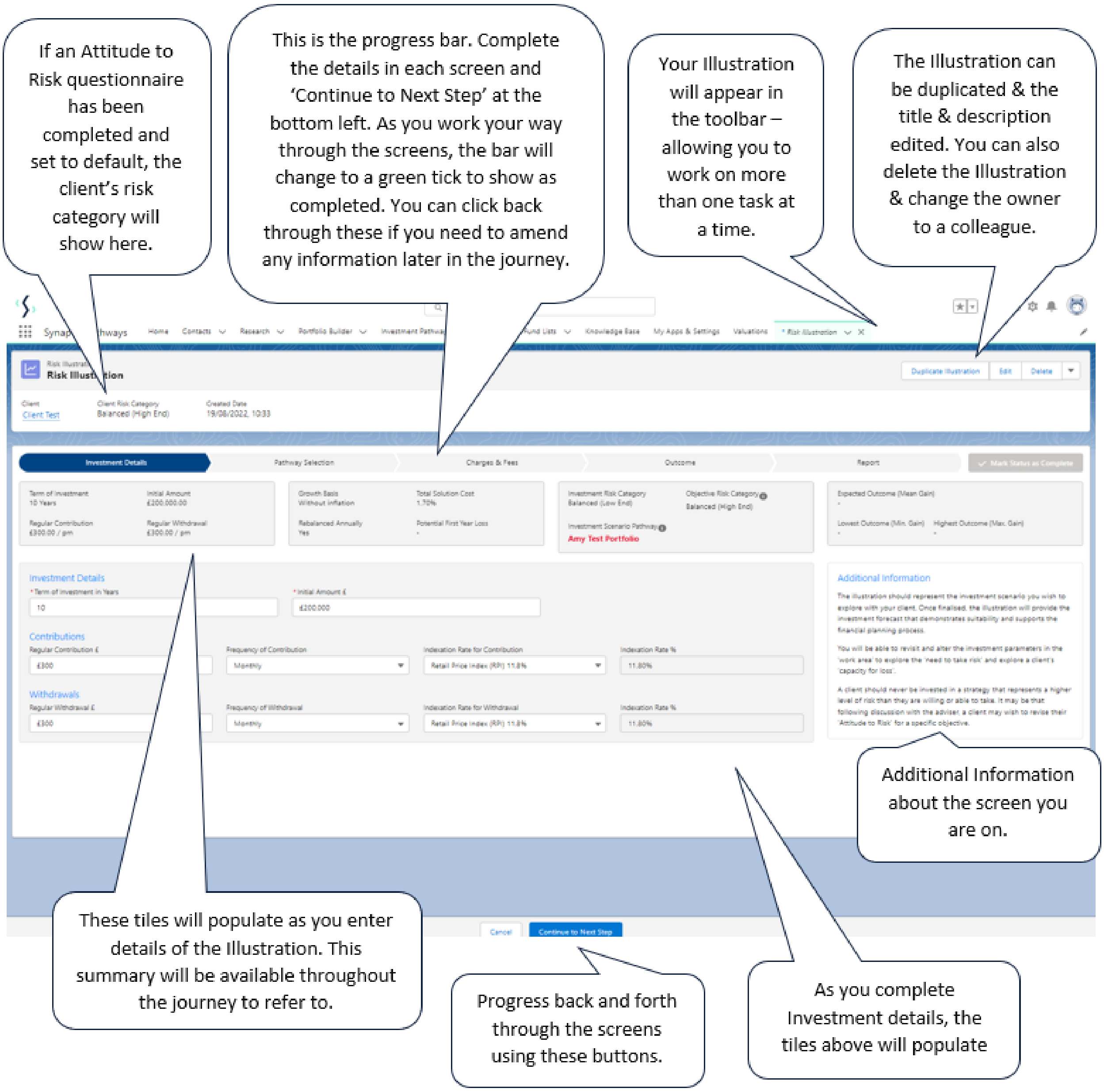
Risk Illustrations

Last Modified on 19/08/2022 3:57 pm BST

Illustrations are found within the Contact record:




If an Attitude to Risk questionnaire has been completed and set to default, the client's risk category will show here.
This is the progress bar. Complete the details in each screen and 'Continue to Next Step' at the bottom left. As you work your way through the screens, the bar will change to a green tick to show as completed. You can click back through these if you need to amend any information later in the journey.
Your Illustration will appear in the toolbar – allowing you to work on more than one task at a time.
The Illustration can be duplicated & the title & description edited. You can also delete the Illustration & change the owner to a colleague.
Risk Illustration
Investment Details
Pathway Selection
Charges & Fees
Outcome
Report
Additional Information
Contributions
Withdrawals
Additional Information about the screen you are on.
These tiles will populate as you enter details of the Illustration. This summary will be available throughout the journey to refer to.
Cancel
Continue to Next Step
Progress back and forth through the screens using these buttons.
As you complete Investment details, the tiles above will populate