

Organisation Growth Rates

Last Modified on 20/06/2022 12:46 pm BST

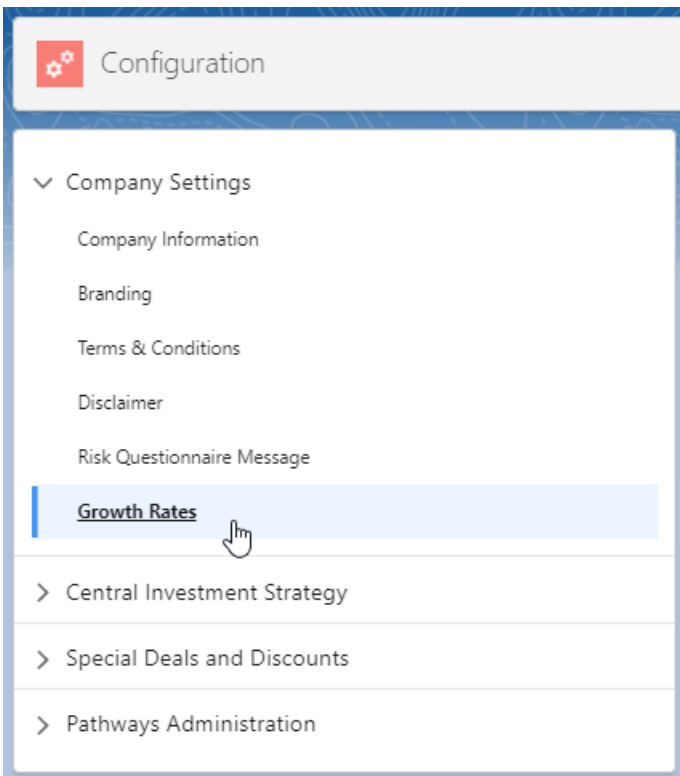
Set default growth rates for your organisation for use in the research journeys.

The growth rates set will be used as default values for deterministic projections for user defined holdings and when determining ceding schemes yields in Switching research.

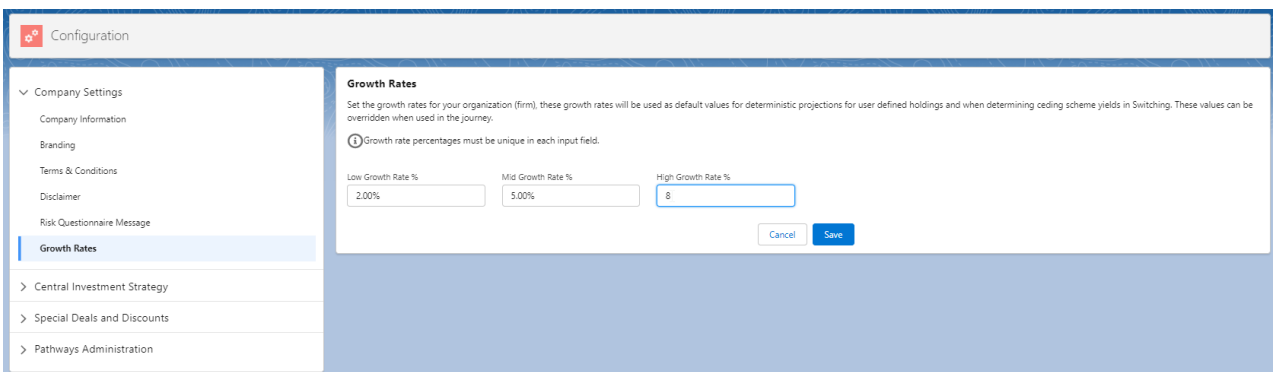
Navigate to the **Configuration** tab:

The screenshot displays the Synaptic Pathways web application interface. At the top, there is a navigation menu with the following items: Synaptic Pathways, Home, Contacts, Research, Portfolio Builder, Investment Pathways, Configuration (highlighted with a mouse cursor), Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. A search bar is located to the right of the navigation menu. Below the navigation menu, the main content area is divided into several sections. On the left, there is a 'Welcome to Synaptic Pathways' message and a large banner with the Synaptic Pathways logo and the text 'Research and due diligence software for financial advice.' Below the banner, there are three main sections: 'Your Clients', 'View Investment Pathways', and 'View and Build Portfolios'. Each section has a brief description and an 'Explore' button. On the right side, there is a 'Recent Contacts (3)' section listing three contacts: Ms. Client Test, Dr. Casey Sharon Cooper, and Ms. Jane Doe. Below this, there is a 'Recent Items (1)' section with one item labeled 'test'. At the bottom left of the screenshot, the URL 'https://synapticpathwaysuat.lightning.force.com/lightning/n/synapticf_Configuration' is visible.

Click into **Growth Rates** within **Company Settings**:



Growth rates percentages must be unique in each input field:



Once entered, the growth rates will pull through to the research.

Growth rates can also be overridden in the research if needed.