Adding/Removing Portfolios from the Central Investment Proposition

Last Modified on 23/02/2024 12:05 pm GMT

Navigate into the Investment Pathways tab.

Click into the CIP you would like to amend:

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Click into the Portfolio Tab:

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Use the search box on the left of the screen to find Portfolios you would like to add to the CIP.

The all dropdown can be used to set what type of portfolio you would like to search for:

Central Investment Proposition Central Investment Proposition.									
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Search and select the + to add to the Portfolios Selected area:

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Remove Portfolios through the bin icon:

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You will need to add portfolios to any segments you have created. See articleCentral Investment Proposition - Adding Portfolios to a Segment