Creating a new contact in Synaptic Comparator

Last Modified on 14/02/2020 11:24 am GMT

To create a new contact in Synaptic Comparator, click on the Contacts button in the left hand menu:

Contacts

You will then be presented with the **Contacts** screen:

SYNAPTIC SOFTWARE	new edit delete reassig	n duplicate refresh save cancel actions	
Contacts Personal Details Contact Information Clent & Family Assets assets under administration	Contacts filter contacts by name, postcode or county. Q. filter contacts' 4 exciliable Example Test Avra 123 Client TestA Herrs AdvA1111 Example TestB Beds An1 2222	Personal name Mr Client address 23 Test Avenue TestVille Test Herts AAAA 1111	date of birth 19/09/1976 15 gender Male • home 0111111111 office 0111111112
	Beds AA1 2222 ▲ Client TestC	email ClientA@Test.com Activities Savailable	mobile 0111111113

Click the **new** button:



The contact details (titled Personal) will then go blank except for the title field:

Personal					
name	Mr	 ★ forename 	* suma	*	
address			* date of birth	dd/mm/yyyy 15*	
			home		
	town		*		
	county		* office		
	postcode	*	mobile		
email			service level	*	
	* mandatory fields				

Complete the input fields as per the labels to the left hand side. Fields marked with a * are mandatory fields and must be entered before you can save a contact.

Please be aware that the **service offering** field directly relates to the adviser charges you have set per service offering. For more information on how to check / set the adviser charges, please see the related article.

When you have finished adding the contact details, you can click **save** to create the new contact, or **cancel** if you've decided not to keep the information entered



To setup the Assets Under Administration for your client, please see the related article.