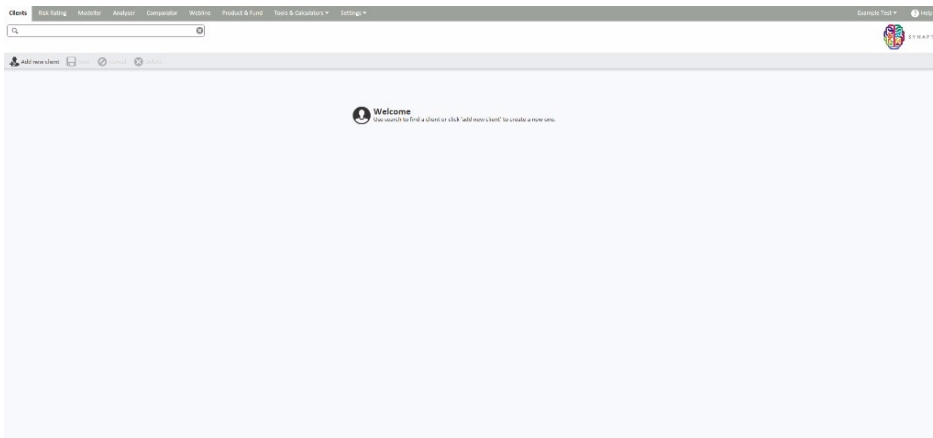


Creating New Clients

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Those fields marked with a * are the minimum required to complete the process, however if you want to use the client throughout all the applications in the suite then it is recommended that you complete all the **Personal Details** fields.

An example of a new client is shown below:

Title

Name

Address

Postcode

Date of Birth

Sex Male Female

Smoker Yes No

If recording the client's occupation, start typing the first few letters of the occupation and a drop down list with matching occupations will appear:

Occupation

- Home Machine Attendant
- Office Binding Machine Attendant
- Mobile Bottling Machine Attendant
- Email Canning Machine Attendant
- Wrapping Machine Attendant

Start typing. The system will then display a list. Select from the list. If the occupation is not here, use **Unknown**.

You can also select pre-set **Service Levels** from the drop down menu. Administrator

licence holders will be able to amend the Service Levels on the Synaptic Settings tab if required. See the Synaptic Client Administrator Guide for more details.

The **External Identifier** field at the bottom of the screen is for use with a back office system that already integrates with Synaptic.

The screenshot displays the Synaptic client administration interface. The top navigation bar includes 'Clients', 'Risk Rating', 'Modeller', 'Analyser', 'Comparator', 'Webline', 'Product & Fund', 'Tools & Calculators', and 'Settings'. A search bar and a user profile icon are also present. Below the navigation bar, there is a toolbar with 'Add new client', 'Save', 'Cancel', and 'Delete' buttons. The main content area is titled 'Personal Details' and contains the following fields:

- Title: Mr (dropdown)
- Name: Example
- Address: Test Road
- Postcode: AAA 123
- Date of Birth: 01/11/1980
- Sex: Male (selected), Female
- Smoker: No (selected), Yes
- Occupation: Baker
- Home: [empty]
- Office: [empty]
- Mobile: [empty]
- Email: [empty]
- Salary £: [empty]
- Service Level: Platinum (dropdown)
- Attitude to Risk: Balanced (dropdown)
- External identifier: [empty]

At the bottom of the form, there are 'Edit' and 'Report' buttons. The 'Save' button is highlighted in the toolbar at the top of the form.

Once all the required fields have been completed, use the **Save** button at the top of the screen:

