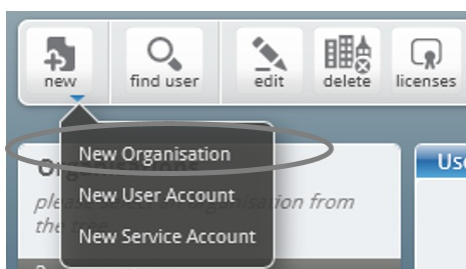


# How do I add additional organisations?

Last Modified on 23/01/2018 3:21 pm GMT

The child organisations of your company can be set up within Synaptic to allow separate offices to maintain their own system settings, i.e. if they have different adviser charges or panels. Select the organisation under which the new organisation should sit i.e. the parent for the new child organisation and then click on **new** in the ribbon bar and select **New Organisation**.



Enter the child organisations details and click **OK**.

A screenshot of the 'Edit Organisation Details' dialog box. The dialog has a title bar with a building icon and the text 'Edit Organisation Details'. Below the title bar, it says 'Required fields are marked with an asterisk (\*)'. The form contains several fields: 'name' (with 'Test Branch' entered), 'email' (with 'testbranch@synaptic.co.uk' entered), 'phone' (with '01276 750001' entered), 'fax' (empty), 'frn' (with '123456' entered), 'principal frn' (empty), 'web address' (empty), and 'region' (with 'United Kingdom' selected in a dropdown menu). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Your organisation will now have a menu triangle and the child organisations will be displayed under your organisation.

Users can then be added as explained in the **Adding Users** section of this guide.

## Organisations

*please select an organisation from the tree*

2 organisations

- ◀ **Test Company (1)**
    - Test Branch
-