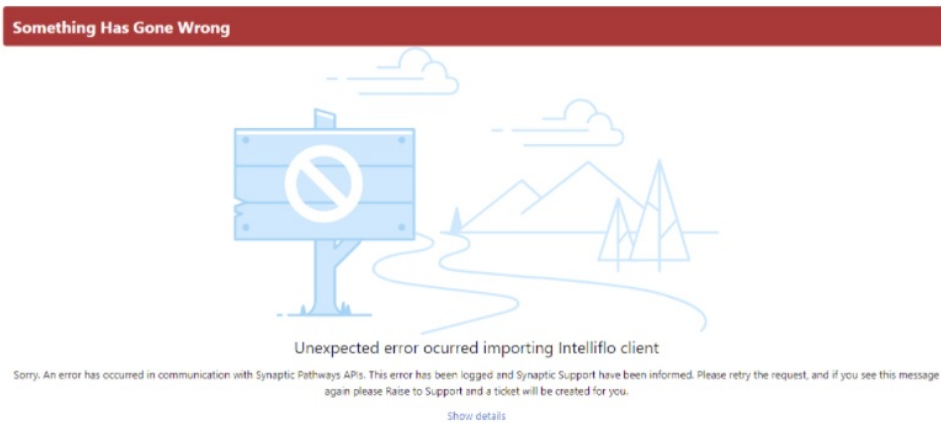


Error message importing intelliflo client

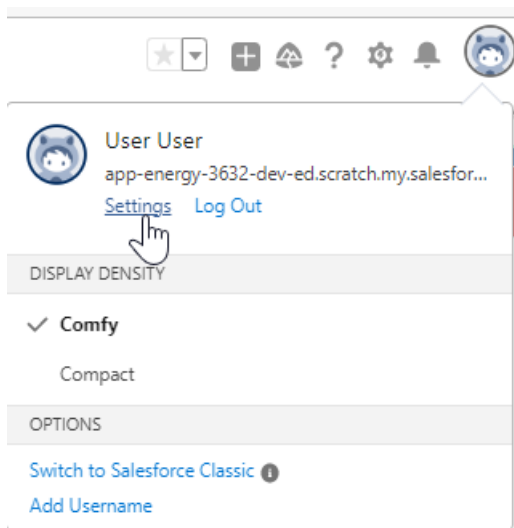
Last Modified on 10/03/2023 12:11 pm GMT

Error message importing intelliflo client

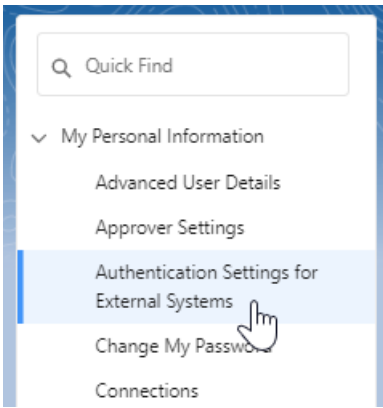
If you see the following error message, you might need to enable permission for external systems to connect Intelliflo to Synaptic Pathways



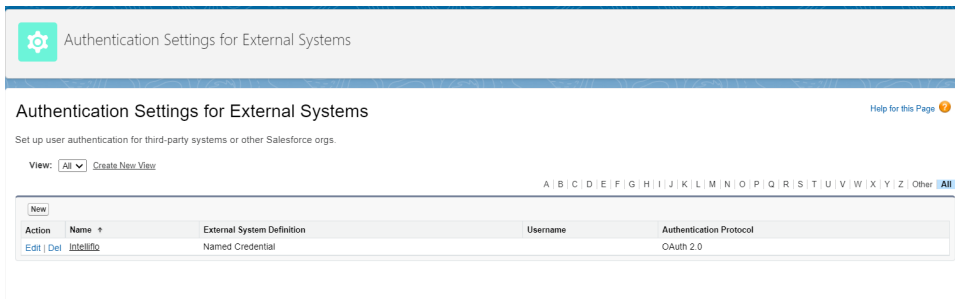
Click on your avatar (profile icon) at the top right of the screen and click on **Settings**



On the left hand side click **Authentication Settings for External Systems**



Click on **New** to add a new authentication entry or if there is an existing one click on **Edit**



If the user field is not populated, click on the **Search** icon

Authentication Settings for External Systems


Set up user authentication for third-party systems or other Salesforce orgs.

Save Cancel

Authentication

External System Definition: Named Credential


Named Credential: Intellifio

User:  [User Lookup \(New Window\)](#)

Authentication Protocol: OAuth 2.0

Select the user from the list or enter the username and click **Go** to search and select the user

Lookup

Search... 

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Users

Full Name	Role
User User	

Make sure the username field is populated and **Start Authentication Flow on Save** checkbox is **ticked** and click on **Save**.

Authentication Settings for External Systems

Set up user authentication for third-party systems or other Salesforce orgs.

Save Cancel

▼ Authentication

External System Definition Named Credential

Named Credential Intelliflo

User User

Authentication Protocol OAuth 2.0

Authentication Provider Intelliflo

Scope

Authentication Status Pending

Start Authentication Flow on Save

Save Cancel

If you are not logged into intelliflo office, you will be prompted to **Login**

Login

Email or Username

Password

Login

Check all components have permissions selected to grant access and click on the **Yes, Allow** button

Synaptic Pathways is requesting your permission

Uncheck the permissions you do not wish to grant.

Personal Information

- Your user identifier** *(required)*
Your user identifier
- Basic profile**
Your basic user profile information (first name, last name, etc.)

Application Access

- My Profile** *(required)*
Basic user profile and email information
- Personal client data**
All personal and contact data relating to a client/lead (excluding financial information).
- Financial client data**
All financial data relating to a client.
- Offline Access**
Access to your applications and resources, even when you are offline

Remember My Decision

Yes, Allow

No, Do Not Allow

Link to next article [Importing client details](#)
