

# Creating a Trial - Existing Salesforce Customers

Last Modified on 13/02/2024 3:35 pm GMT

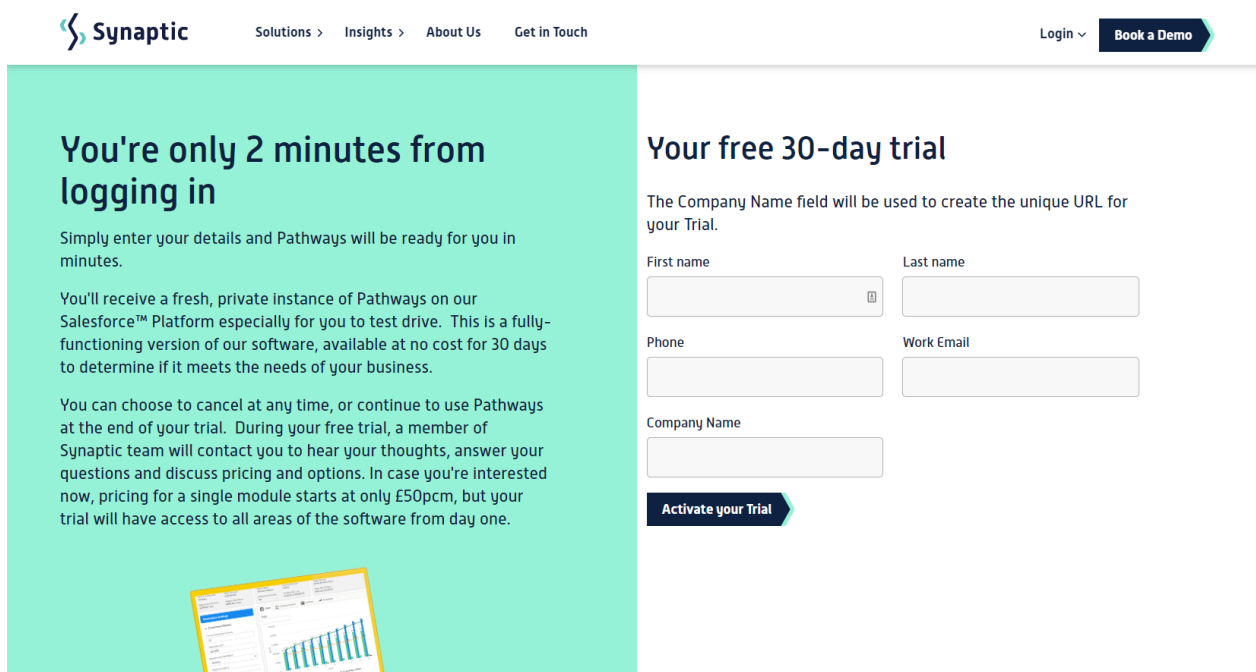
Your administrator will need to manage the package installation into Salesforce. Follow this link to Salesforce guidance on [Installing Packages](#). Please note - we do not require passwords for installations and always recommend installing on sandbox first for test purposes.

You can create a new trial through our website or through the Salesforce AppExchange.

## Synaptic Website

Go to [www.synaptic.co.uk/trial](http://www.synaptic.co.uk/trial)

Enter details you would use if your licence would be converted to a full licence. Your company name will be used to create a unique URL for your trial.



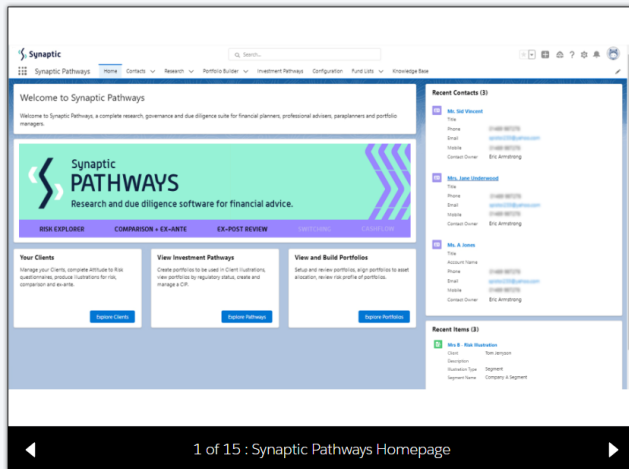
The screenshot shows the Synaptic website's trial sign-up page. The header includes the Synaptic logo, navigation links for Solutions, Insights, About Us, and Get in Touch, and a Login button with a dropdown arrow. A prominent 'Book a Demo' button is also visible. The main content area is split into two columns. The left column has a teal background and contains the heading 'You're only 2 minutes from logging in', followed by text explaining that users can simply enter details to get Pathways ready in minutes, receive a fresh private instance of Pathways on the Salesforce Platform for a 30-day trial at no cost, and choose to cancel at any time. A small image of a tablet displaying a dashboard is at the bottom of this section. The right column has a white background and is titled 'Your free 30-day trial'. It includes a note that the company name field is used to create a unique URL. Below this are input fields for First name, Last name, Phone, Work Email, and Company Name. An 'Activate your Trial' button is positioned at the bottom of the form.

## Salesforce AppExchange

Go to [Synaptic Pathways - Synaptic Software Limited - AppExchange \(salesforce.com\)](https://www.salesforce.com/appexchange/packages/synaptic-pathways)

As seen below, you are able to scroll through screenshots of Synaptic Pathways, view the Highlights and Description. Features, Requirements, Support Details, Data Sheets and White Papers can be found at the bottom of the page.

# Synaptic Pathways



1 of 15 : Synaptic Pathways Homepage

Get It Now

Starting at £50 GBP per user per month

Discounts available for nonprofits

Watch Demo

RATING  
★★★★★ (0)

CATEGORIES  
Finance

LATEST RELEASE  
4/25/2022

Research-led digital transformation for financial advice firms

Change up to Synaptic from pre-MiFID II systems and standalone tools. Embed automated advice, research and due diligence processes and cut out unnecessary cost, constraints and errors imposed by legacy research and technology

Overview Reviews

### Highlights

- ✔ Supports goal-based financial planning as well as providing research to demonstrate proof of suitability. Audits the entire advice process from ATRQ, risk profiling, asset allocation, Capacity for Loss & portfolio construction to basis of recommendation.
- ✔ Offers a full compliance and governance solution within a PROD framework, managing platform, product, portfolio and fund panels. Firms can now fully configure and work within their Central Investment and Central Retirement Propositions.
- ✔ Full disclosure of costs & charges - platform, product, portfolio, special deal & adviser charges, disclosure for MiFID II. Ex-ante illustration & reporting capability. Full switching & pension consolidation research capabilities & automatic valuations.

### Description

Firms which have struggled with research and advisory software in the past are likely to have tools and processes that do not fulfil the current requirements of MiFID II or PROD. This can cost firms time and resources as well as being prone to error.

An entirely new, comprehensive solution has been designed and built by Synaptic for the modern advisory firm to deliver streamlined and consistent advice, based on a firm's own investment strategy.

The research suite delivers comprehensive data on platforms, products, portfolios and funds across integrated research tools, including client risk profiling, investment risk profiling, asset allocation and forecasting from Moody's Analytics, together with costs and charges analysis to MiFID II disclosure rules (ex-ante).

Illustrations from Synaptic are produced automatically without rekeying and allow users to configure and work within a firm's own Central Investment (and Retirement) Propositions.

Synaptic research processes are complete and smooth, making it a delight to execute complex illustrations and formulate outstanding advice with research tools built exclusively on the Salesforce platform.

### Features

Lightning Ready	Essentials & Up
No Limits	Person Accounts

### Package Contents

Custom Objects: <b>68</b>
Custom Applications: <b>1</b>

### Lightning Components

Global: <b>88</b>
App Builder: <b>0</b>

### Requirements

Salesforce Edition  
Professional, Enterprise,  
Unlimited, Developer,  
Performance, Essentials

Other System  
Requirements  
Platform cache

### Support

0808 164 5463  
Email  
Knowledge Base  
Terms and Conditions

### Additional Information

Package Name  
Synaptic Pathways

Custom Tabs: **15**

Community Builder: **0**

Version  
Version 4.1 / 4.15.0

Listed On  
12/15/2020

Latest Release  
4/25/2022

Languages  
[English](#)

**Whitepapers**

[The Synaptic guide to risk](#)

**Synaptic**

**Synaptic**  
65 Gresham Street, London, EC2V 7NQ

Founded  
1995

Website  
<https://www.synaptic.co.uk/>

Email  
[hello@synaptic.co.uk](mailto:hello@synaptic.co.uk)

Phone  
0800 783 4477

Professional research data and tools for financial planning and advice.

We help advisers and paraplanners to create better financial outcomes for clients through market leading research and due diligence. Synaptic tools combine data on platforms, products, portfolios and funds to produce illustrations and reports to MiFID II standards that are ideal for using with clients as well as compliance purposes.

Offer your solution on AppExchange [Privacy Statement](#) [Security Statement](#) [Terms of Use](#) [日本語](#) 2000-2022, salesforce.com, inc. [Cookie Preferences](#)

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**Starting at £50 GBP per user per month**  
Discounts available for nonprofits

[Save](#) [Watch Demo](#) [Get It Now](#)

To create your 30-day trial, you will need to click 'Get It Now'

[Get It Now](#)

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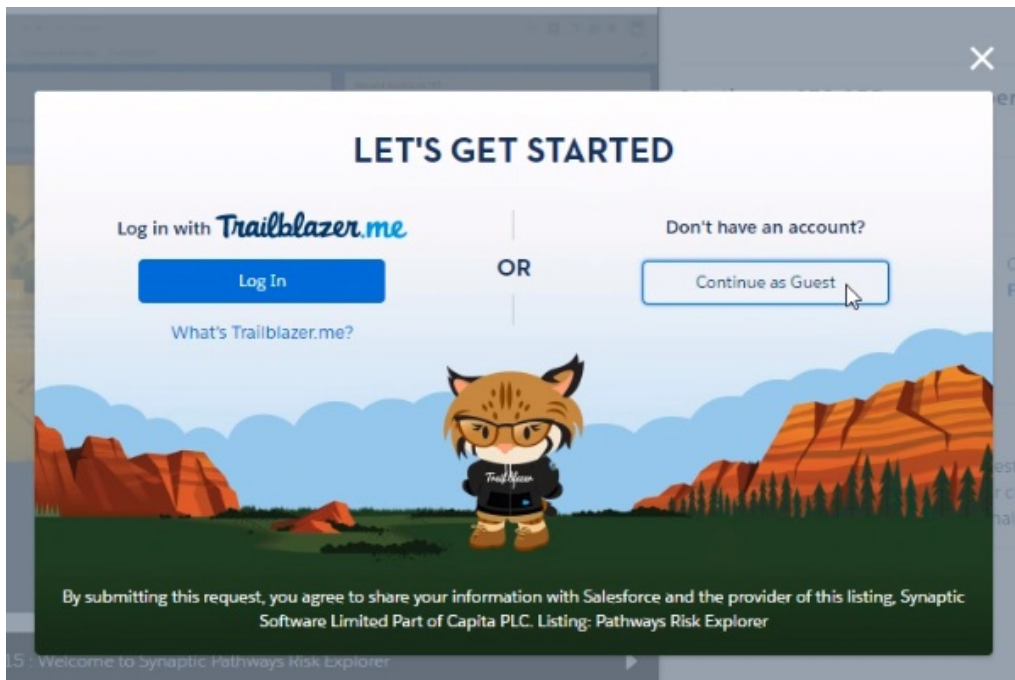
**RATING**  
★★★★★ (0)

**CATEGORIES**  
[Finance](#)

**LATEST RELEASE**  
10/11/2021

**Research-led digital transformation for financial advice firms**  
Change up to Synaptic from pre-MiFID II systems and standalone tools. Embed automated advice, research and due diligence processes and cut out unnecessary cost, constraints and errors imposed by legacy research and technology

Log into your Trailblazer account:



Complete the details to start your free trial:

**Please note: ensure your username and email address are the credentials you would like to use when your trial account is converted to a full licence.**

Ready to start your trial?

Fill out this form and we'll set you up with a free trial of Pathways Risk Explorer.

* Username	<input type="text"/>	* Company	<input type="text"/>
* First Name	<input type="text"/>	* Country	Choose...
* Last Name	<input type="text"/>	* State/Province	-- Not Required --
Job Title	<input type="text"/>	* Salesforce.com Relationship	Choose...
* Email	<input type="text"/>		
Phone	<input type="text"/>		

I have read and agree to the terms and conditions.

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel Start Free Trial

Ready to start your trial?

Fill out this form and we'll set you up with a free trial of Pathways Risk Explorer.

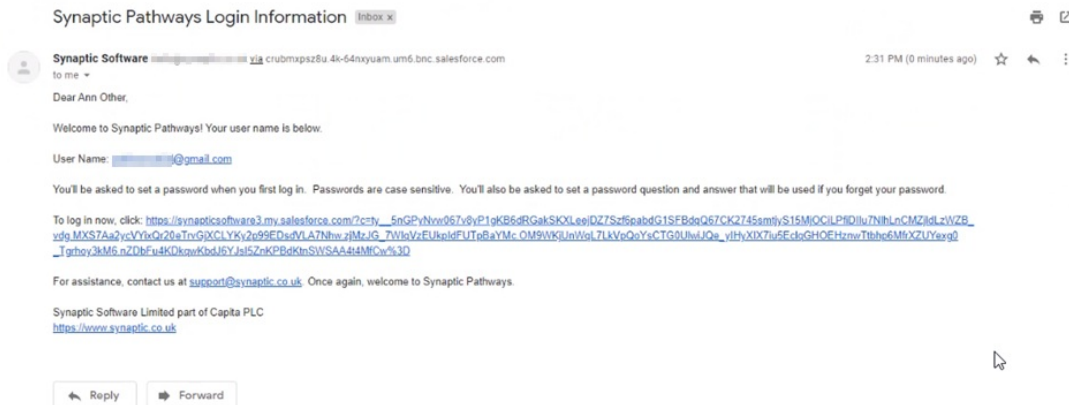
* Username	<input type="text" value="ann.sage@synaptic.co.uk"/>	* Company	<input type="text" value="Synaptic Software"/>
* First Name	<input type="text" value="Ann"/>	* Country	<input type="text" value="United Kingdom"/>
* Last Name	<input type="text" value="Other"/>	* State/Province	<input type="text" value="-- Not Required --"/>
Job Title	<input type="text" value="Software Tester"/>	* Salesforce.com Relationship	<input type="text" value="Prospective customer"/>
* Email	<input type="text" value="ann.sage@synaptic.co.uk"/>		
Phone	<input type="text" value="01273 826611"/>		

I have read and agree to the terms and conditions.

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Once you select 'Start New Trial' you will receive an email to login. Click the link to open Pathways Risk Explorer.

**Please note - this may take a few minutes to come through. If you have not received the email, check your Junk folder.**



To login in the future, you can access Synaptic Pathways through this direct link - [Synaptic Pathways | Synaptic Software](https://www.synaptic.co.uk) or through our website - [Synaptic Software](https://www.synaptic.co.uk).

# Trusted intelligence to power today's best financial advice

Powerful planning and research software to streamline research and advice journeys for your customers

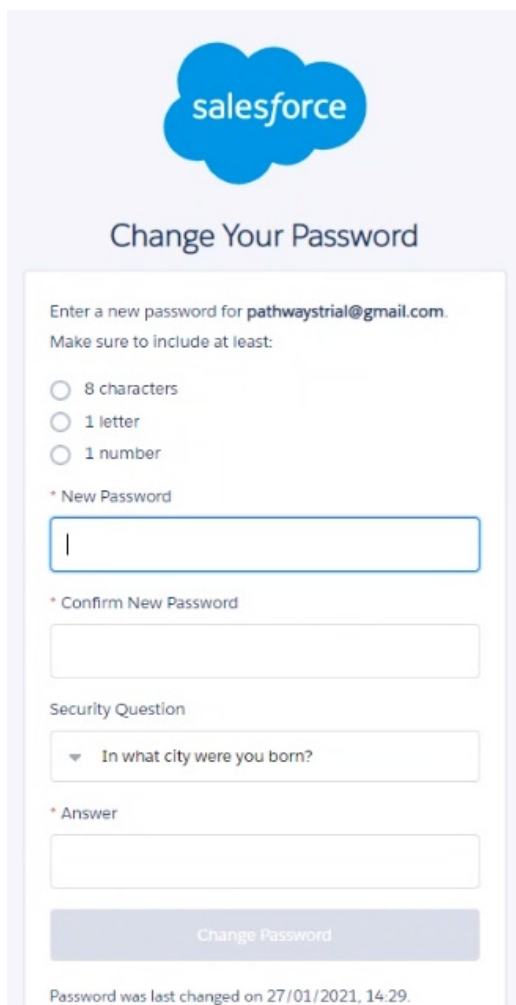
Book a demo

- PATHWAYS >>
- WEBLINE
- PRODUCT AND FUND
- SYNAPTIC SUITE
- COMPARATOR
- MODELLER
- SYNAPTIC RISK
- ANALYSER
- UPDATE MANAGER

Technology to help businesses like yours plan smarter

https://login.salesforce.com

Enter a new password, security question and answer. Click 'Change Password':



salesforce

## Change Your Password

Enter a new password for **pathwaystrial@gmail.com**.  
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password

\* Confirm New Password

Security Question

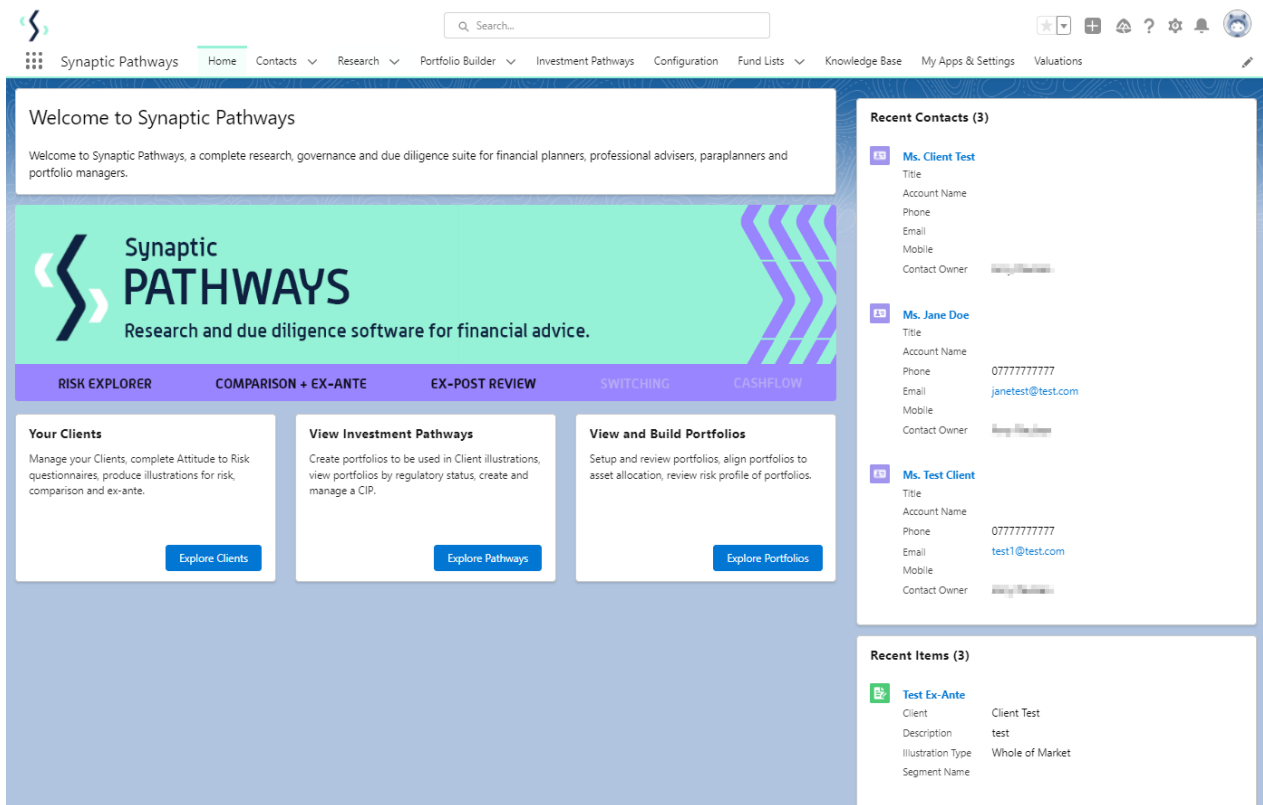
▼ In what city were you born?

\* Answer

Change Password

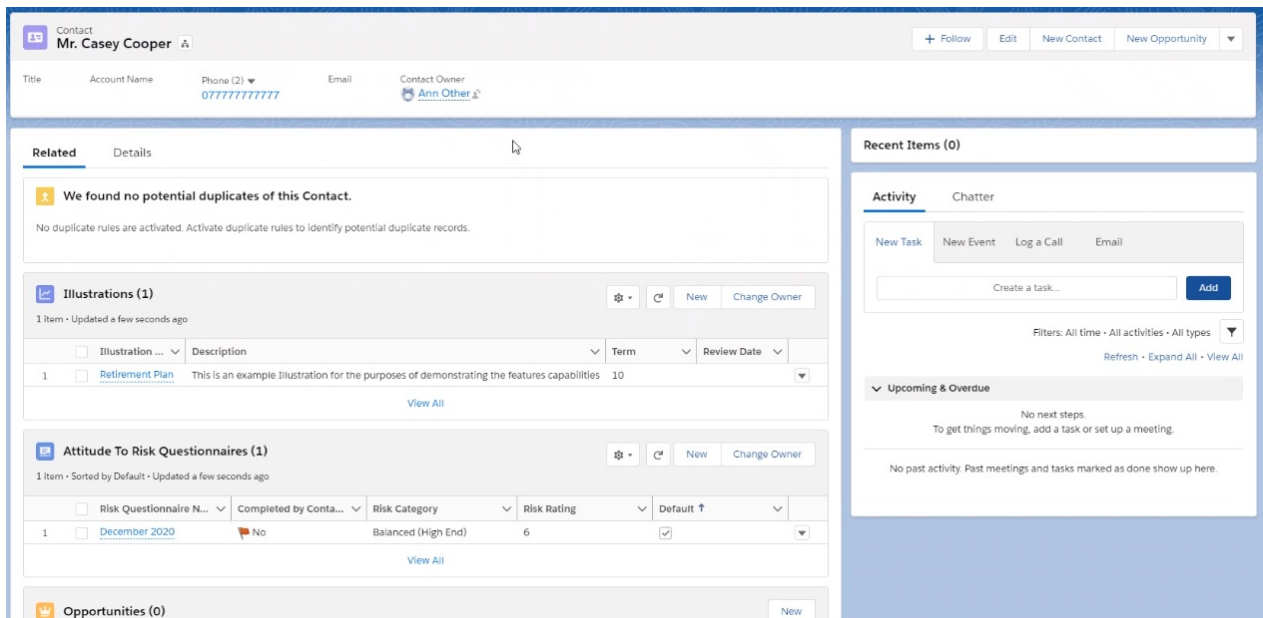
Password was last changed on 27/01/2021, 14:29.

This will log you into your Pathways Risk explorer trial version:



The system will come with some pre-populated data as standard. This will allow you to view test Contacts, Attitude to Risk Questionnaires and Illustrations.

As seen in the contact below, Casey Cooper has been populated with test data.



All Contacts, Attitude to Risk Questionnaires and Illustrations you enter onto your trial version, will be pulled through to your purchased version.

Next step - Set up your Attitude to Risk site - [Setup - Attitude to Risk Questionnaire](#)

### Trial Conditions

Existing Salesforce customers get a 30-day trial of our Synaptic Pathways application.

