

Creating a Trial - New Customers

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

This article is for new Salesforce users. If you are an existing Salesforce user, see article - [Creating a Trial - Existing Salesforce Customers](#)

You can create a new trial through our website.

Go to 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 features the headline 'You're only 2 minutes from logging in', followed by text explaining that users can get a private instance of Pathways on the Salesforce Platform for 30 days at no cost. It also mentions that users can cancel at any time and that the Synaptic team will contact them during the trial. An image of a software interface with a bar chart is shown at the bottom of this section. The right column has a white background and features the headline 'Your free 30-day trial', followed by a note that the company name field will be used to create a unique URL. Below this are input fields for First name, Last name, Phone, Work Email, and Company Name, each with a small icon to its right. At the bottom of the right column is an 'Activate your Trial' button.

To login in the future, you can access Synaptic Pathways through this direct link - [Synaptic Pathways | Synaptic Software](#) or through our website - [Synaptic Software](#).

Trusted intelligence to power today's best financial advice

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

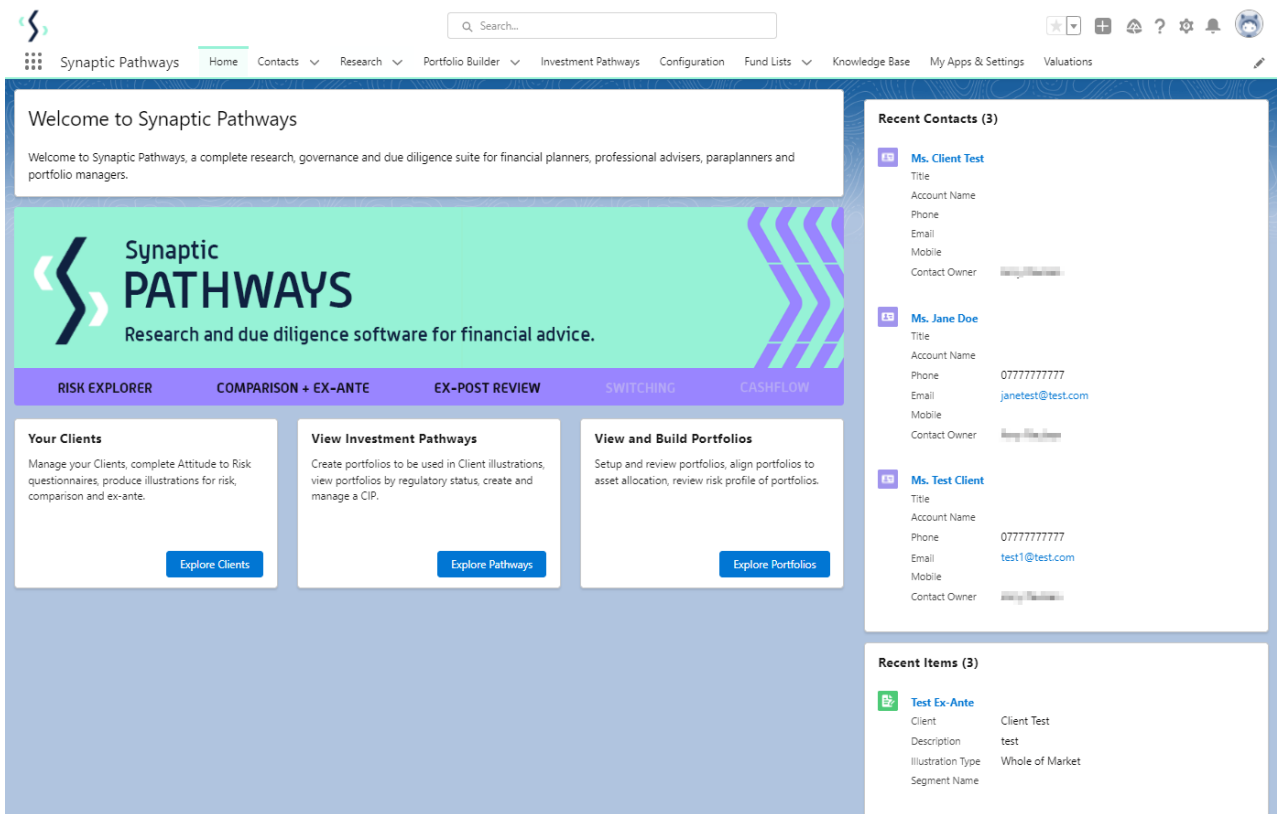
[Book a demo](#)

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

Technology to help businesses like yours plan smarter

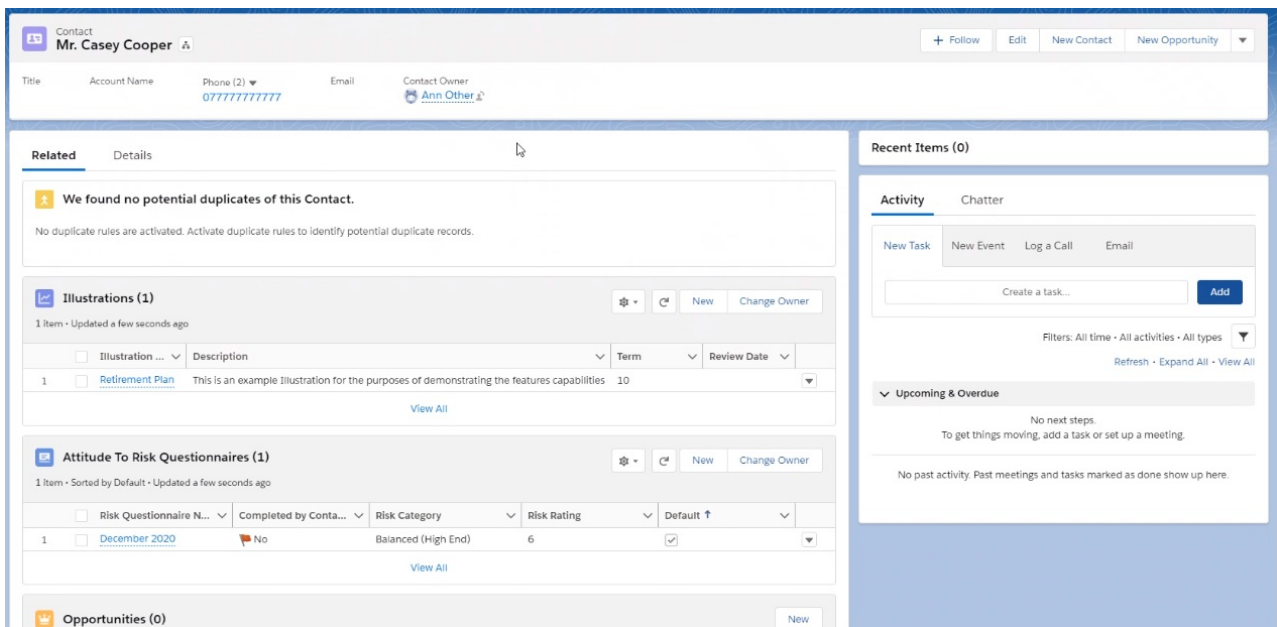
Enter a new password, security question and answer. Click 'Change Password':

This will log you into your Synaptic Pathways 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

New customers get a 30-day trial which includes a 30-day trial of Salesforce Enterprise Edition.

Trial accounts use Salesforce Enterprise licences as the 'base' licence and you will be able to view Salesforce in-built CRM functionality, such as opportunities and marketing campaigns. When you convert from a trial to a standard Risk Explorer licence, your organisation will be restricted to the Salesforce OEM licence and therefore you no longer have access to Create, Read, Update or Delete the following CRM functionality;

- Leads
- Opportunities
- Cases
- Solutions
- Campaigns

Should you wish to upgrade from our OEM edition to a Salesforce Enterprise Edition, contact us for further information.
