

Contact Page

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See below for key areas of Synaptic Pathways Contact page:

The screenshot displays the Synaptic Pathways Contact page for 'Mr. Test Client1'. The interface includes a navigation bar at the top with options like Home, Access Centre, Contacts, Research, and Portfolio Builder. The main content area is divided into several sections:

- Client Overview:** Includes fields for Title, Account Name, Phone, and Owner.
- Medical Details:** A section for client medical information.
- Holdings:** A section for client holdings.
- Family Assets under Management:** A section for family assets.
- Risk Questionnaire:** A table with columns for Client Questionnaire Name, Completed, Risk Category, Risk Rating, and Default. One entry is visible: 'ATR Questionnaire' with a 'No' completion status and a 'Moderately Cautious (High End)' risk category.
- Risk Illustrations:** A section for risk illustrations.
- Research:** A section for research, including sub-sections for Income Analysis, Protection, Opportunities, Cases, Off-Platform Holdings, Platform Holdings, and Campaign History.
- Activity:** A section for client activity.
- Recent Items:** A list of recently viewed items, including 'ATR Questionnaire' and 'Test Questionnaire'.

Callout boxes highlight the following key areas:

- Overview of Client details
- Further Client details
- Family Assets under Management
- Edit Client details
- Delete
- Holdings
- Complete or Send an Attitude to Risk questionnaire
- Medical Details
- Recently viewed items
- Create a Risk illustration for your client
- Create Product Comparison Research with Ex-Ante or Ex-Ante only
- Create Income Analysis research
- Generate protection quotes
- Create/View Off-Platform & Platform Holdings