Creating a Contact

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

Create a new contact by navigating to **Contact** in the top toolbar:



Select the drop down arrow to create a new contact:

4)				Q
**	Synaptic Pathways	Home	Paraplanner Access Centre	Contacts X	Research
		႕ New Contact			
V	/elcome to Synapt	Recent record			
1	elcome to Synaptic Pathways, a anagers.	Steve Test	cia		
				Ben Smith	

Complete the details of your client:

All 👻 🔍 Search			
	New C	ontact	
Contact Information			
Contact Owner		Phone	
Amy Paulsen		0777777771	
* Name		Home Phone	
Salutation		0142222222	
Ms.	•		
First Name			
Test * Last Name			
*Last Name			
Change 2			
Account Name		Mobile	
Search Accounts	Q		
Birthdate		Other Phone	
	苗		
Occupation		Fax	
Search Occupations	٩		
Sex		Emall	
None	•		
Employment Basis			
None	•		
Salary			
Address Information			
Address Information		Oliver Malare	
Address Search Address		Q Search Address	
Malling Street		Other Street	
		Cancel Save & New	Save

When entering the birthdate, start by selecting the year, month and day:

							prine 6	annean						/mv u	attican					
ntact	Infor	matio	n				_1_	(остов	ER	►	197	0	•	S	EPTEMB	ER	•	197	0
	t Owne Iaulsar						Mon	Go to	previo	ous mo	onth	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Su
•		остов	ER	•	2020															
Mon	Tue	Wed	Thu	Fri	1965 1966 1967					1	2	3	4		1	2	3	4	5	6
			1	2	1968 1969	•	5	6	7	8	9	10	11	7	8	9	10	11	12	1
5	6	7	8	9	1970 1971		12	13	14	15	16	17	18	14	15	16	17	18	19	2
12	13	14	15	16	1973 1974															
19	20	21	22	23	1975 1976		19	20	21	22	23	24	25	21	22	23	(24) Im	25	26	1
26	27	28	29	30	1977 1978 1979		26	27	28	29	30	31	1	28	29	30	\bigcirc			
					1980 1981 1982	Q			4				8			7				
			Today		1983 1984 •															
						i				Today							Today			

The birthdate can be overridden by clicking into the field:

Birthdate	
24/09/1970	i iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii

Complete address details by clicking 'Search Address':

۹	Search Address	
Valling Street	0	

As you enter the details, it will narrow down the search results. Select the correct address from the drop down and the relevant fields with be populated:

		Email
ile	*	test@test.com X
	Address	Search
P015 7AA		
Whiteley Fareham PO15 7AA, UK		
	powered by	Google

Mailing Address

Q	Search Address	
MallIng Street		
Whiteley		
		/
Malling City		Malling State/Province
Fareham		
Malling Zip/Postal Co	ode	Malling Country
PO15 7AA		United Kin

Once complete, if you are only adding the one contact click 'Save'.

If you need to add further contacts, click 'Save& New' (This will save the current contact and will open a new record to complete).



Once saved, you will be taken to the new contact record:



Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds	Configuration Fund Lists V * test client account Account V × More V /
Contact Mr. Test Client1 Title Account Name Phone (2) O7771111111 test@test.com Contact Owner O7771111111 test@test.com Contact Owner	+ Follow Edit New Contact New Opportunity V
Related Details Medical Holdings Related Contacts Family AUM Image: Second control of this contact. Image: Second control of this contact. Image: Second control of this contact.	Recent Items (3) Test Questionnaire Contact Susanna West
Attitude To Risk Questionnaires (0) New Risk Illustrations (0) New	Test Contact Susanna West Test Questionnaire Contact Mike Smith
Research (0) New Income Analysis (0) New	Activity Chatter
Protection (0) New Opportunities (0) New New	Hitters: All time + All activities - All types [48] Refresh + Expand All + View All Upcoming & Overdue No activities to show. Get started by sending an email, scheduling a task, and more.
Cases (0)	No past activity. Past meetings and tasks marked as done show up here.