

# Homepage

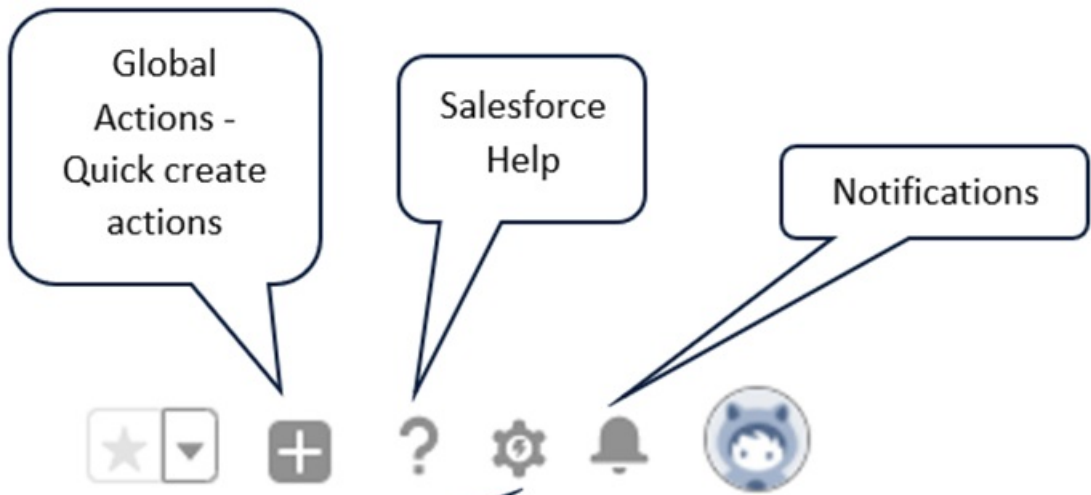
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See below for key areas on the Synaptic Pathways Homepage:

The screenshot shows the Synaptic Pathways homepage with several callout boxes highlighting key areas:

- Navigate home at any time:** Points to the 'Home' link in the navigation bar.
- Search for Contacts, Portfolios, Attitude to Risk Questionnaires, Research, and Illustrations here:** Points to the search bar.
- Access features through the navigation bar. For e.g. Research, Portfolio Builder and Valuations:** Points to the navigation bar.
- Recently viewed contacts:** Points to the 'Recent Contacts (3)' sidebar.
- Explore the Contact area, Investment Pathways and Portfolios through these quick links:** Points to the 'Your Clients', 'View Investment Pathways', and 'View and Build Portfolios' sections.
- This includes any recently viewed items – for e.g. Attitude to Risk Questionnaires, Research, Illustrations and Portfolios:** Points to the 'Recent Items (3)' sidebar.

The homepage layout includes a navigation bar with links for Home, Paraplanner Access Centre, Contacts, Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. The main content area features a welcome message, a large banner for Synaptic Pathways, and several quick links for exploring clients, investment pathways, and portfolios. The right sidebar displays recent contacts and items.



Salesforce Setup

View Profile

