

Income Analysis - Creating Research

20/02/2025 1:52 pm GMT

Create Income Analysis research through the Contact record.

Navigate to **Contacts** tab:

The screenshot shows the Synaptic Pathways dashboard. The navigation menu at the top includes: Synaptic Pathways, Home, Paraplanner Access Centre, **Contacts** (selected), Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. The main content area is titled "Welcome to Synaptic Pathways" and features a large green banner with the Synaptic Pathways logo and the text "Research and due diligence software for financial advice." Below the banner are five main sections: RISK EXPLORER, COMPARISON + EX-ANTE, EX-POST REVIEW, SWITCHING, and CASHFLOW. The "Your Clients" section contains three cards: "Your Clients", "View Investment Pathways", and "View and Build Portfolios", each with an "Explore" button. On the right side, there are two panels: "Recent Contacts (3)" listing three test clients with their details, and "Recent Items (3)" listing three test items.

<https://synapticpathwaysuat.lightning.force.com/lightning/s/Contact/home>

This close-up screenshot shows the navigation menu with the "Contacts" tab highlighted. A mouse cursor is pointing at the "Contacts" tab, and a dropdown menu is visible below it, showing the "Contacts" option. The other tabs visible are "Home", "Paraplanner Access Centre", and "Res".

Find your client in the list or search:



Contacts

Recently Viewed Contacts

6 items • Sorted by Name • Filtered by Recently Viewed • Updated a few seconds ago

	Name ↑	Account Name
1	Ben Smith	
2	Mike Smith	
3	Steve Test	
4	Test Client	
5	test client account	test client account
6	Test Client1	

Test Client1

Scroll down to **Income Analysis** and click **New**:

Contact: Mr. Test Client1

+ Follow Edit New Contact New Opportunity

Related Details Medical Holdings Related Contacts Family ALUM

We found no potential duplicates of this Contact.

Client Questionnaires (1)

Client Questionnaire Name	Completed...	Risk Category	Risk Rating	Default ↑
ATR Questionnaire	No	Moderately Cautious (High End)	4	

Risk Illustrations (1)

Illustration Name	Description...	Target Risk Category	Term	Review Date
Risk Illustration		Moderately Cautious (High End)	10	

Research (0) [New](#)

Income Analysis (0) [New](#)

Protection (0) [New](#)

Opportunities (0) [New](#)

Cases (0) [New](#)

Recent Items (3)

- [ATR Questionnaire](#) Contact: Test Client1
- [Test Questionnaire](#) Contact: Test Client
- [Test](#) Contact: Susanna West

Activity Chatter

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Complete **New Income Analysis** details:

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

Description
Test Description

* Review Date
19/10/2024

Calendar: October 2024. Date 19 is selected.

Buttons: Save & New, Save, New

Save

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

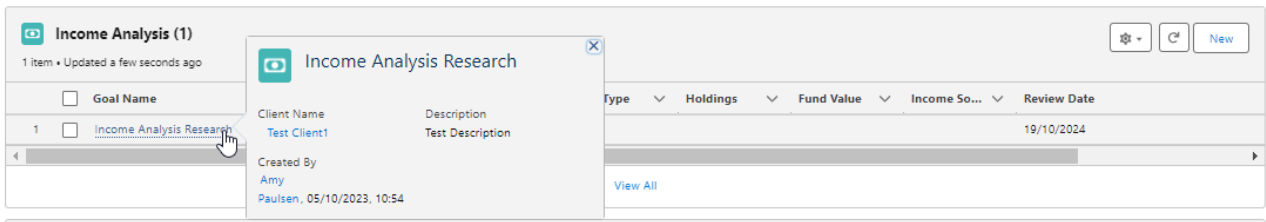
Description
Test Description

* Review Date
19/10/2024

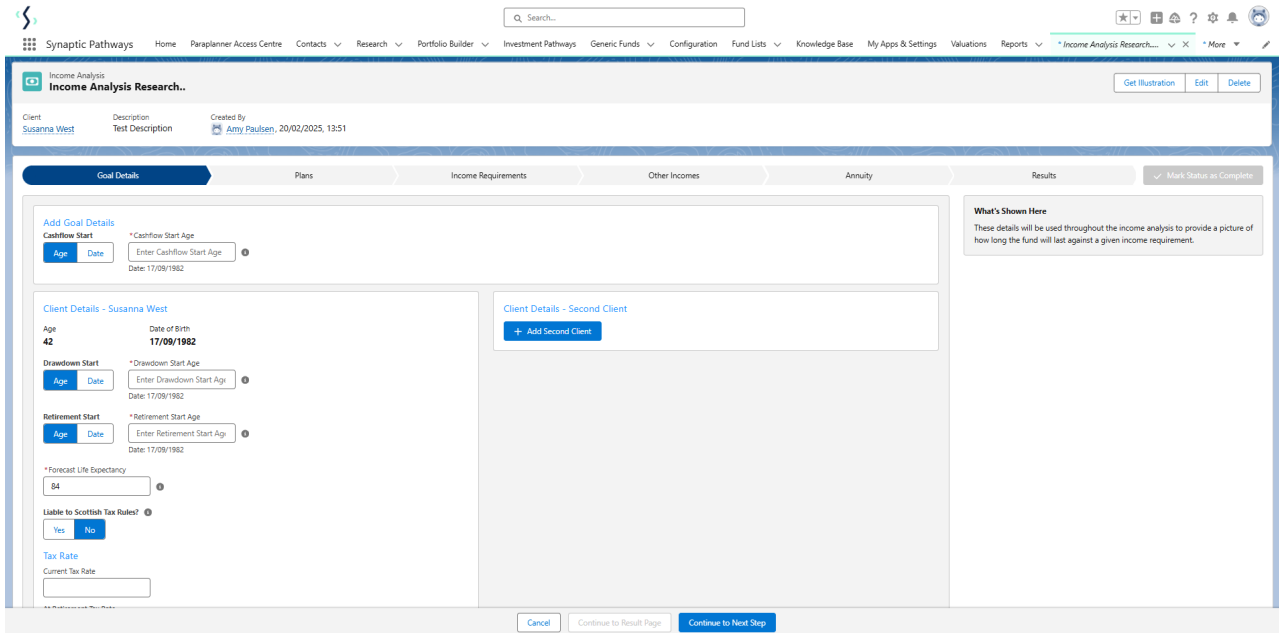
Buttons: Cancel, Save & New, Save

Click into the below link or into the newly created research:

✓ Income Analysis "[Income Analysis Research](#)" was created. ✕



This will take you into the **Add Goal Details** screen:



For further information on Income Analysis research, see article [Income Analysis - Add Goal Details](#)

If you would like to complete joint life research, see article [Income Analysis - Joint Life - Create Research](#)