

Importing client details

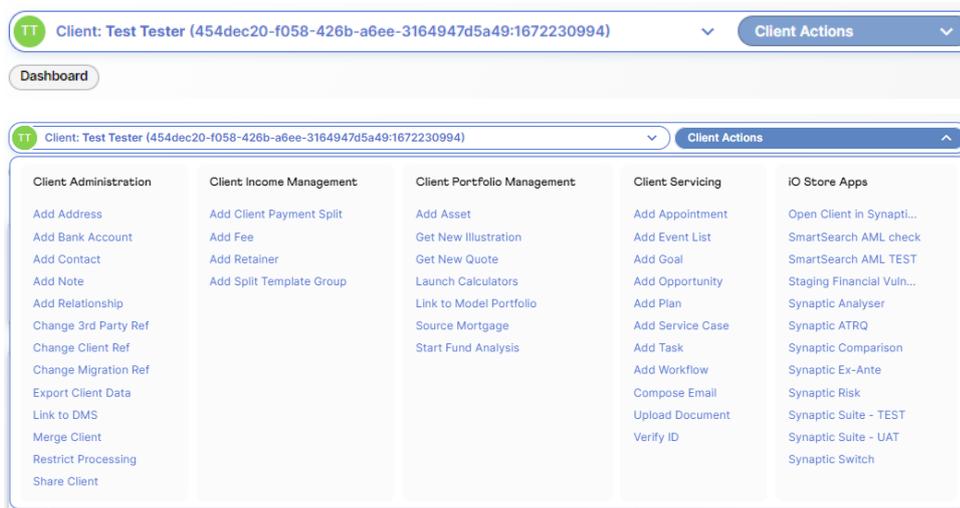
Last Modified on 13/02/2024 3:35 pm GMT

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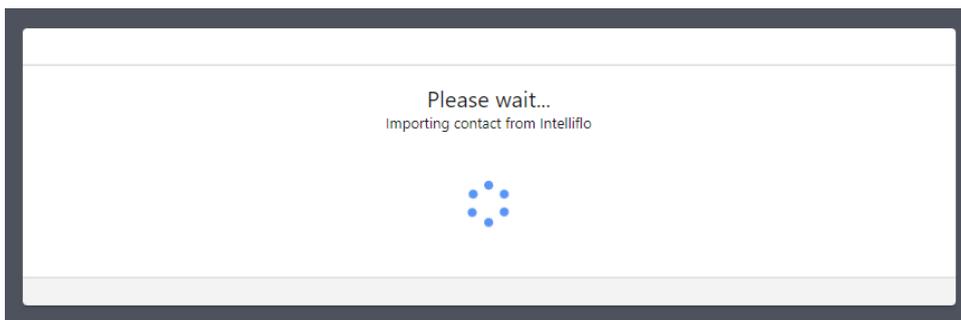
Using the app you can import client details from intelliflo to your Synaptic Pathways account.

If you are an existing Synaptic Pathways user, log into your account. New users to Synaptic Pathways will be directed to sign up for a [free trial](#).

Select a **Client** record and go to **Client Actions**. Click on the Synaptic research tool you wish to use listed under **iO Store Apps** (Synaptic ATRQ, Comparison, Ex-Ante....)



A loading screen will display to inform you the client details are importing



As soon as the client details have been successfully imported you will be taken to the relevant page on the research tool you selected.

For example, if you selected Synaptic ATRQ, a new Attitude to Risk Questionnaire will be created for the contact in Synaptic Pathways populated as below ready for you to continue.

New Attitude To Risk Questionnaire

Information

* Risk Questionnaire Name Owner

Test Tester ATRQ

Client personal details will display in the **Contact > Details** tab

Contact
Test Tester

Title Account Name Phone (2) Email Contact Owner

Related **Details** Medical Holdings Related Contacts Family AUM

Contact Owner

Name
Test Tester

Account Name

Birthdate
29/12/1983

Occupation

Sex
Male

Please note: If you do not have your Salesforce org open you will be prompted to sign in



To access this page, you have to log in to Salesforce.

Username 1 Saved Username

Password

Remember me

[Forgot Your Password?](#)

Once you have logged in with Salesforce you will then see a message box informing you that the import

is in progress.

Link to next article [Importing holdings](#)
