

Importing holdings

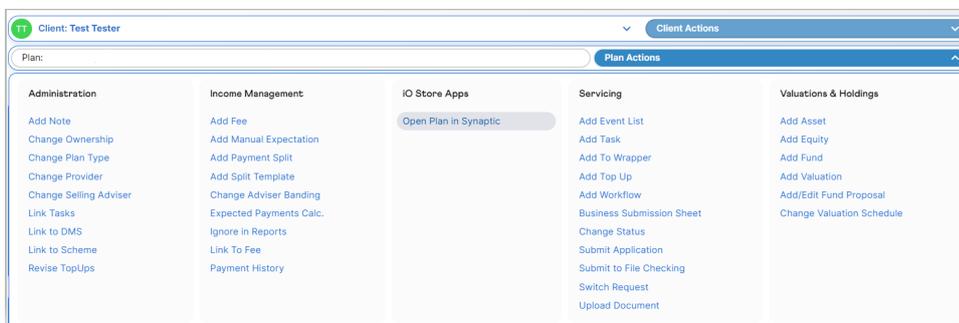
Last Modified on 13/02/2024 3:35 pm GMT

Importing holdings

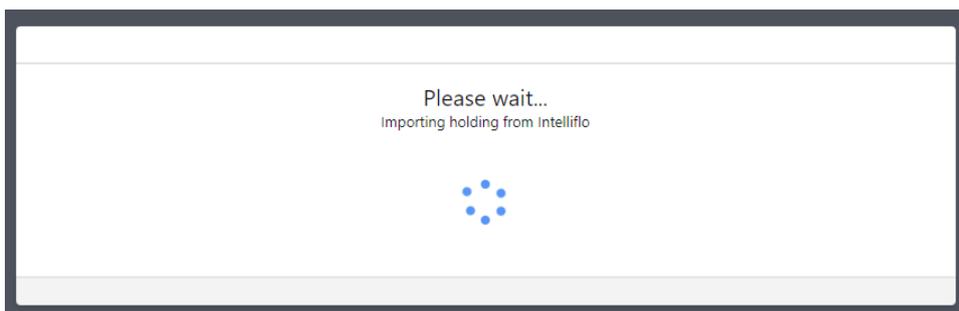
Using the app you can import client holdings from intelligflo to your Synaptic Pathways account.

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](#).

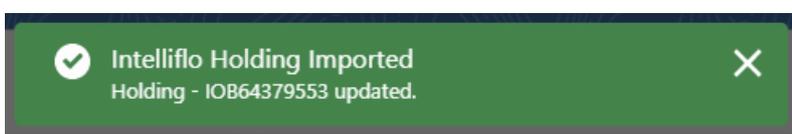
Select a **Client** record and go to **Plan Actions**. Click on **Open Plan in Synaptic** listed under **iO Store Apps**



A loading screen will display to inform you the holding is importing



If the import has been successful you will see a green notification message appear informing you the holding has been updated and you will then be taken to the holdings screen.



A generic product has been created, please review in the holdings area to add any information required to use throughout Pathways

[Navigate To Holding](#)

Holding
IOB64379553

Client: Test Tester Current Value: £0.00 Current Risk Rating:

Details Underlying Assets Cash Accounts Assets Performance Charges History

Name IOB64379553	Description	Start Date 30/12/2022	End Date
Provider Name HSBC Life (UK) Ltd	Type (Basis) Name Investment Trust	Remaining Term	Review Date
Status	Contract Reference	Rolling Term Basis 5 to 9 yrs (10 years)	Last Modified Date 30/12/2022, 10:58
<input type="checkbox"/> Request Bulk Valuation		Surrender/Transfer Value 0.00	

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

[Log In](#)

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.

[Saving reports to Intelliflo](#)