

Creating a Protection quote

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If you haven't already, ensure your credentials have been completed in My Apps & Settings - [Entering your Synaptic Webline Credentials.](#)

Navigate to the **Contact** record:

The screenshot shows the Synaptic Pathways web application interface. At the top, there is a navigation bar with the Synaptic Pathways logo and several menu items: Home, Paraplanner Access Centre, Contacts (highlighted with a dropdown arrow), and Research (with a dropdown arrow). A mouse cursor is hovering over the 'Contacts' menu item, which has opened a dropdown menu containing the word 'Contacts'. Below the navigation bar, a large blue banner displays the text 'Welcome to Synaptic Pathways' and 'Welcome to Synaptic Pathways, a complete research, governance and due diligence suite for financial plar'. Below the banner, there is a search bar and a series of utility icons. The main content area shows a table of contacts. The table has columns for Name, Account Name, Title, Phone, Email, and Contact Owner Alias. There are four rows of contact data. The first row is for Susanna West, the second for Les West, the third for Hermione West, and the fourth for John Smith. The table is filtered by 'All contacts' and updated a few seconds ago. The URL at the bottom of the page is <https://www.synaptic.com/contacts/003620003846ADU/...>

	Name	Account Name	Title	Phone	Email	Contact Owner Alias
1	Susanna West			07355555555	amy.wood@synaptic.co.uk	apaul
2	Les West	Susanna West		0777777712	testles@gmail.com	apaul
3	Hermione West			01888888933	hermionew@test.com	mhall
4	John Smith				john.smith@synaptic.com	pava

Scroll down to **Protection** and click **New**

The screenshot shows the Synaptic Pathways interface for contact Ms. Susanna West. The top navigation bar includes a search field and various menu items like Home, Paraplanner Access Centre, and Research. The main content area is divided into several sections:

- Income Analysis (3)**: A table with columns for Goal Name, Income Re..., Goal Type, Holdings, Fund Value, Income So..., Review Date, and Convert To. It lists three items, all named 'Income Analysis'.
- Protection (3)**: A table with columns for Protection Name, Description, and Created Date. It lists three items: 'Test Protection', 'Test Life Assurance', and 'Test Protection'. A red box highlights the 'New' button in the top right corner of this section.
- Opportunities (0)**: A section with a 'New' button.
- Cases (0)**: A section with a 'New' button.
- Off-Platform Holdings (3)**: A section with a 'New' button and a table with columns for Name, Provider N..., Contract R..., Current Va..., Type (Basis) Name, Product Name, and Status.

Complete details and **Save**

The 'New Protection' form is displayed with the following fields and controls:

- Information** section header.
- * Protection Name**: A text input field containing 'Protection Quote Test'.
- * First Life**: A dropdown menu showing 'Susanna West'.
- Description**: A text area containing 'Test Description Text'.
- At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'. A mouse cursor is clicking on the 'Save' button, which has a tooltip that says 'Save'.


✓ Protection "Protection Quote Test" was created. ✕

Click into the quote:

Protection (3) 3 items • Updated a few seconds ago ⚙️ 🔄 New

<input type="checkbox"/>	Protection Name	Description	Created Date	
1	<input type="checkbox"/> Test Life Assurance		20/02/2024, 15:23	⌵
2	<input type="checkbox"/> Test Protection		21/02/2024, 13:26	⌵
3	<input type="checkbox"/> Protection Quote Test		22/02/2024, 11:33	⌵

[View All](#)

 **Protection Quote Test** ✕

See next article: [Selecting Benefits](#)
