Creating a Special Deal on a Contact record

Last Modified on 18/04/2024 10:42 am BST

Client special deals will be used above firm, network and portfolio deals. They are created within the Contact record.

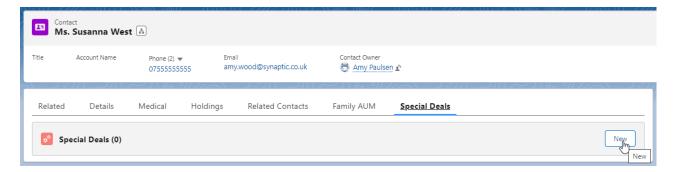
Navigate to the contact record:

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Casey Cooper			0777777779	ment hypertipation	apaul
Casey Cooper.			0122222222	test1245@gmail.com	apaul
Casey Sharon Cooper			01678954321	stand with an international the	smilh
Les West			0777777712	any condition when a	apaul
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Steve Test			07777777773	and constitution and and	apaul
			+447913132801	Search provide Springer and an	sferg
Susanna West			0755555555	the satisfies and	apaul
Test Client Susanna W	/est		0777777777	test4@test.com	apaul
Test Client1			07771111111	and a second distance of the	apaul

Navigate into the Special Deals tab:

IVIS	Susanna Wes	• 😀									
	Account Name	Phone (2) 💌 07555555555		mail my.wood@synaptic.co.uk	Contact Owner Tany Paulsen		5 / // (
elated	Details	Medical	Holdings	Related Contacts	Family AUM	Special	Deals				
X We	e found no pote	ntial duplicates o	of this Cor	ntact.		Ð	Special Deals				
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Click the **New** button:



Select Platforms or Off-Platforms Products

Add New Special Deal	
To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then sele	ct the deal and enter your deal details.
Contact Susanna West	
Select Search Type Platforms Off Platform Products Q Search	
* Name Enter Name of Special Deal	
Description Enter Description	
	Cancel Save & New Save

Select a Platform/Off-Platform Product from the drop down:

Q Search	
Elevate	^
James Hay Modular iPlan	
James Hay Partnership Wrap	
Parmenion	
Raymond James - Option 1	
Raymond James - Option 2	-

Complete the **Name** field. The description box is optional.

Save

Add New Special Deal	
To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then sele	ct the deal and enter your deal details.
Contact	
Susanna West	
Select Search Type Platforms Off Platform Products Q. Search Image: Parmenion X	
* Name	
Parmenion S West Deal	
Description	
Test Description	
	Cancel Save & New Save

This will load the Special Deal page.

					1137 - 71311	
ame armenion S West Deal	Provider Parmenion	Special Deal Type Client	P	eal Start Date (leave blank to apply fr	om today)	Last Modified Date Thu, 18 Apr 24
Active Not Active	Platform All Platform Products	Client Name Susanna West		eal End Date (leave blank for no expi		Last Modified By Amy Paulsen
Special Deal Charge Type	Special Deal Charge Details					About Special Deal
Platform Charges						Edit the provider published charge tiers to apply the special deal you have agreed with the provider.
Platform Charges						Change the existing tiers or add and remove new tiers.
Charge Tier Name Platform AMC				Edit Add	Row	Use the 'Revert' Action to return to the default published charge details.
View Provider Charges View Network Charges	Tier Start \lor Tier End	∨ Rate %	∨ Rate £	✓ Fund Type	~	From time to time published charges may be revised or removed by t provider, in the event of a change a warning notification will appear to
S Revert to Provider Charges	£0.00 £300,000.00	£299,999.99 £599.999.99	0.30	All		indicate the special deal needs attention.
	£600,000.00	£1,499,999.99	0.20	All		Special Deals are applied when an illustration is requested, only 'Activ Deals are applied.
	£1,500,000.00		0.15	All		
Charge Tier Name						
GIA Standard Switch Transaction Charge View Provider Charges View Network Charges					Row	
Revert to Provider Charges	Tier Start V Tier End	∨ Rate %	✓ Rate £ 0.45	V Fund Type	~	

Client special deals are completed in the same way as firm special deals. See article Creating Special Deals or view video Creating Special Deals - Video

In the below example we have tweaked the **Rate%** and **Save**

Platform Charges								
✓ Platform Charges								
Charge Tier Name Platform AMC View Provider Charges View Network Charges							Cancel Edi	
view network charges		Tier St 🗸	Tier End 🗸	Rate % 🗸 🗸	Rate £ 🗸 🗸	Curren 🗸	Select Fun.	Remove
5 Revert to Provider Charges	1	£0.00	£299,9	0.25		All		÷
	2	£300,0	£599,9	0.20		All		曲
	3	£600,0	£1,499,	0.15		All		Ê
	4	£1,500,		0.10		All		â
				Cano	cel Save			

Once saved, the special deal will be highlighted in green:

iharge Tier Name Platform AMC						
View Provider Charges		Tier Start 🗸 🗸 🗸	Tier End 🗸 🗸	Rate % 🗸 🗸	Rate £ v Fund Type	dd Row
Severt to Provider Charges	1	£0.00	£299,999.99	0.25	All	
	2	£300,000.00	£599,999.99	0.20	All	
	3	£600,000.00	£1,499,999.99	0.15	All	
	4	£1,500,000.00		0.10	All	

Navigate back to the contact once complete:

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Synaptic Pathways Home Pa	raplanner Access Centre Contacts	✓ Research ✓ Portfo	olio Builder 🗸 Investme
	+ New 0	Contact	
Name	Provid Recent r	records S	pecial Deal Type
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Active Not Active	Platfor All Pl		Client Name Susanna West
	Les West		
Special Deal Charge Type	Casey Sha	ron Cooper hils	
Special Scal charge Type	Casey Coo		
Platform Charges	Recent li	ists	
✓ Platform Charges	Recently V	/iewed Contacts	
	All Contac	ts	
Charge Tier Name Platform AMC			



le	Account Name	Phone (2) ▼ 07555555555	Emai amy	wood@synaptic.co.uk	Contact Owner	<u>n</u> £	
Related	Details	Medical	Holdings	Related Contacts	Family AUM	Special Deals	
Sp	ecial Deals (1)						New
	al Name	Deal Sta	art Date	Deal Er	nd Date	State	
Special De	ai Name						