

# Creating a Special Deal on a Contact record

Last Modified on 18/04/2024 10:41 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:

Name	Account Name	Title	Phone	Email	Contact Owner Alias
Casey Cooper			0777777779	amy.wood@synaptic.co.uk	apaul
Casey Cooper			0122222222	test1245@gmail.com	apaul
Casey Sharon Cooper			01678954321	amy.wood@synaptic.co.uk	smith
Les West			0777777712	amy.wood@synaptic.co.uk	apaul
John Dowling					mcros
John Dowling					mcros
John Dowling			0		rchum
Steve Test			0777777773	amy.wood@synaptic.co.uk	apaul
Steve Test			+447913132801	amy.wood@synaptic.co.uk	sferg
Susanna West			0755555555	amy.wood@synaptic.co.uk	apaul
Test Client	Susanna West		0777777777	test4@test.com	apaul
Test Client			0777111111	amy.wood@synaptic.co.uk	apaul

Navigate into the **Special Deals** tab:

Client Questionnaire Name	Completed by Con...	Risk Category	Risk Rating	Default	CFLQ Com...
Attitude to Risk Questionnaire	Yes	Moderately Adventurous	4.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test ATR 2	No	Moderately Adventurous	4.00	<input type="checkbox"/>	<input type="checkbox"/>
Test ATR Feb24	Incomplete			<input type="checkbox"/>	<input type="checkbox"/>

Click the **New** button:

Contact  
**Ms. Susanna West**

Title Account Name Phone (2) Email Contact Owner  
0755555555 amy.wood@synaptic.co.uk Amy Paulsen

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

Special Deals (0) New

### 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 select the deal and enter your deal details.

Contact  
Susanna West

Select Search Type  
**Platforms** Off Platform Products

Search

\* Name  
Enter Name of Special Deal...

Description  
Enter Description

Cancel Save & New Save

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

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 select the deal and enter your deal details.

Contact:

Select Search Type: Platforms Off Platform Products

Search:

\* Name:

Description:

This will load the Special Deal page.

Synaptic Pathways

---

Name: **Parmenion S West Deal**

Provider: **Parmenion**

Platform: **All Platform Products**

Special Deal Type: **Client**

Client Name: **Susanna West**

Deal Start Date (leave blank to apply from today):

Deal End Date (leave blank for no expiry date):

Last Modified Date: **Thu, 18 Apr 24**

Last Modified By: **Amy Paulsen**

Special Deal Charge Type

Special Deal Charge Details

About Special Deal

**Platform Charges**

Platform Charges

Charge Tier Name: **Platform AMC**

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£299,999.99	0.30		All
£300,000.00	£599,999.99	0.25		All
£600,000.00	£1,499,999.99	0.20		All
£1,500,000.00		0.15		All

Charge Tier Name: **GIA Standard Switch Transaction Charge**

Tier Start	Tier End	Rate %	Rate £	Fund Type
			0.45	All

**Individual Savings Accounts**

Edit the provider published charge tiers to apply the special deal you have agreed with the provider.

Change the existing tiers or add and remove new tiers.

Use the **'Revert'** Action to return to the default published charge details.

From time to time published charges may be revised or removed by the provider, in the event of a change a warning notification will appear to indicate the special deal needs attention.

Special Deals are applied when an illustration is requested, only **'Active'** Deals are applied.

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

Revert to Provider Charges

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	<b>£0.00</b>	£299,9...	<b>0.25</b>		All		
2	£300,0...	£599,9...	<b>0.20</b>		All		
3	£600,0...	£1,499,...	<b>0.15</b>		All		
4	£1,500,...		<b>0.10</b>		All		

Cancel Edit Add Row

Cancel Save

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

Platform Charges

Charge Tier Name  
**Platform AMC**

View Provider Charges View Network Charges

Revert to Provider Charges

	Tier Start	Tier End	Rate %	Rate £	Fund Type
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

Edit Add Row

Navigate back to the contact once complete:

Synaptic Pathways Home Paraplanner Access Centre **Contacts** Research Portfolio Builder Investme

Search...

Name  
**Parmenion S West Deal**

Active Not Active

Special Deal Charge Type

Platform Charges

Platform Charges

Charge Tier Name  
**Platform AMC**

Recent records

- Susanna West
- Test Client
- Les West
- Casey Sharon Cooper
- Casey Cooper

Recent lists

- Recently Viewed Contacts
- All Contacts

View your created deal



Contact

**Ms. Susanna West**

Title

Account Name

Phone (2) ▼

0755555555

Email

amy.wood@synaptic.co.uk

Contact Owner

Amy Paulsen

Related

Details

Medical

Holdings

Related Contacts

Family AUM

**Special Deals**



**Special Deals (1)**

New

Special Deal Name	Deal Start Date	Deal End Date	State
<a href="#">Parmenion S West Deal</a>			active

[View All](#)