

How do I configure the Contacts tab to only view my clients?

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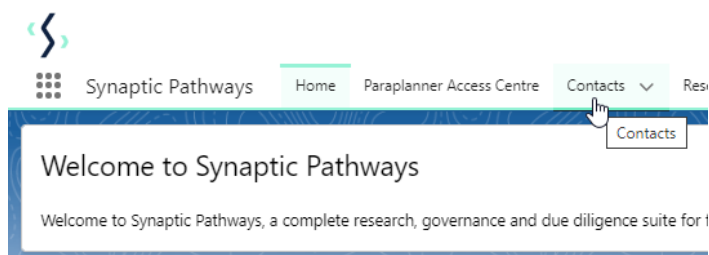
List Views can be configured within Synaptic Pathways. In this article, we will take you through cloning an existing view & creating multiple views to show the information you require.

All list views default to recently viewed records. Creating your own view allows you to set what information you would like to see.

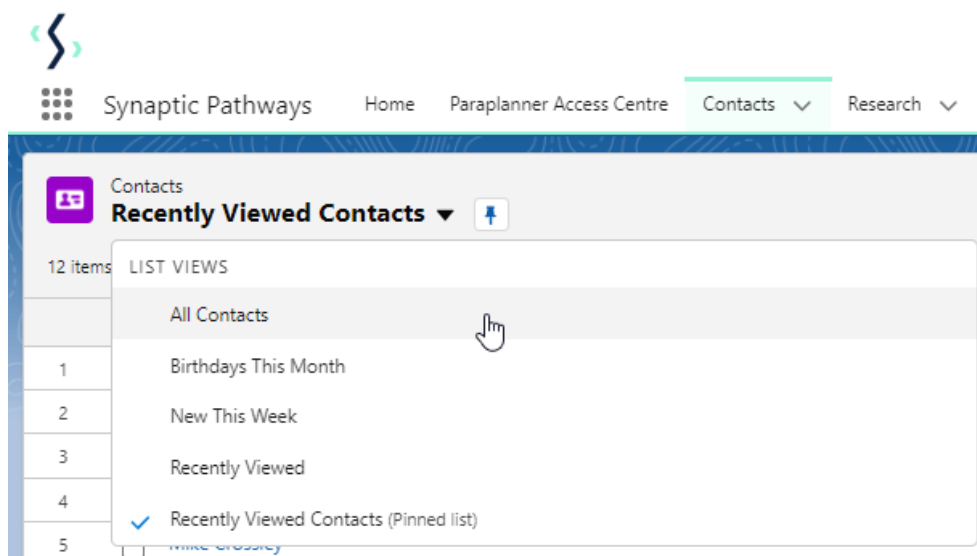
For example, If you have more than one licence in your company, you may want to set a view to show only your clients, configure the portfolio builder tab to show your portfolios or set the research tab to list all your research.

In this article, we will configure the Contacts tab.

Navigate into the Contacts tab:



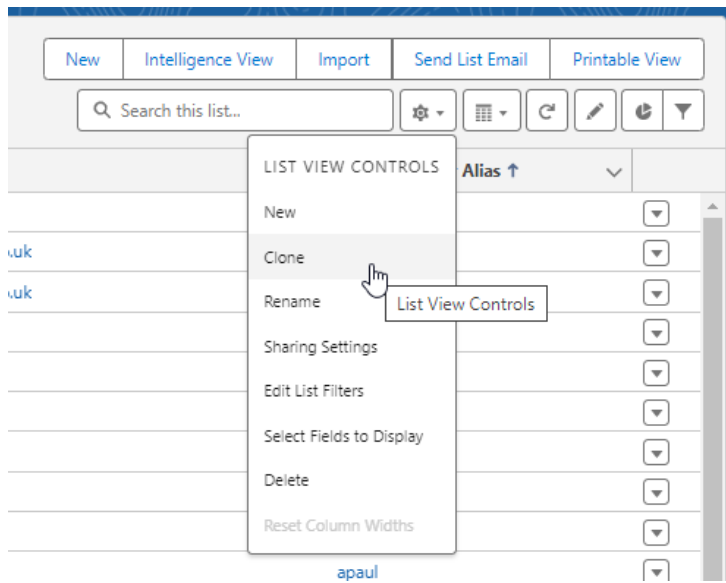
Once within the Contacts tab, click the down arrow next to **Recently Viewed Contacts** and select **All Contacts**



The **All Contacts** view can be pinned if you would prefer to view all contacts rather than recently viewed. Note: This will include all contacts within your company.

We will clone the **All Contacts** view and configure this to only pull through clients you have created.

Click on **List View Controls** and **Clone**



Keep the default **List Name** or enter you own:

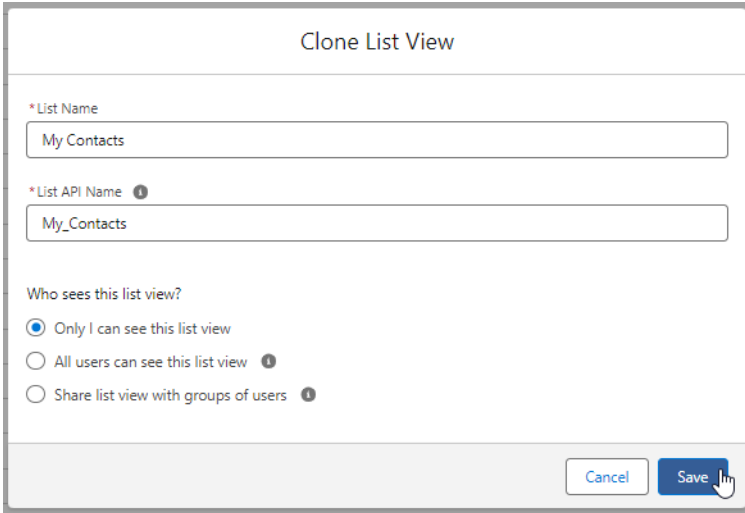
A screenshot of a 'Clone List View' dialog box. It has a title bar 'Clone List View'. Below the title bar, there are two input fields: '* List Name' containing 'Copy of All Contacts' and '* List API Name' which is empty. Below these fields, there is a section 'Who sees this list view?' with three radio button options: 'Only I can see this list view' (selected), 'All users can see this list view', and 'Share list view with groups of users'. At the bottom right, there are 'Cancel' and 'Save' buttons.A screenshot of a 'Clone List View' dialog box. It has a title bar 'Clone List View'. Below the title bar, there are two input fields: '* List Name' containing 'My Contacts' and '* List API Name' containing 'My_Contacts'. Below these fields, there is a section 'Who sees this list view?' with three radio button options: 'Only I can see this list view' (selected), 'All users can see this list view', and 'Share list view with groups of users'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Set the permissions of the list. In this case, only you will be able to see this list view.

Who sees this list view?

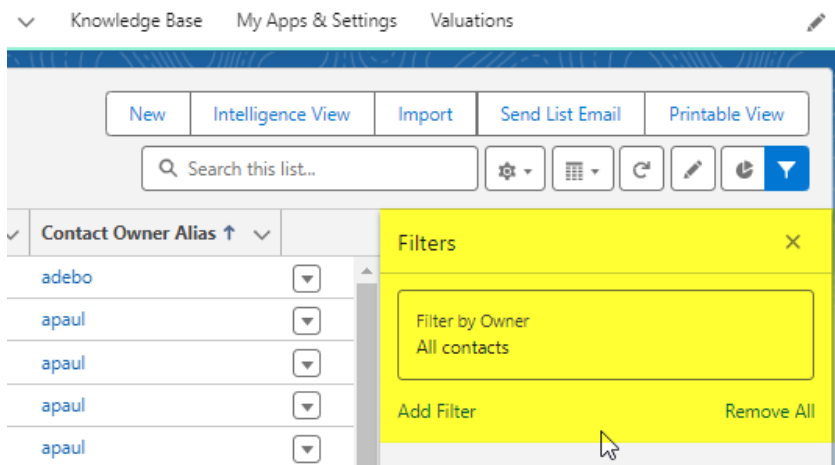
- Only I can see this list view
- All users can see this list view ⓘ
- Share list view with groups of users ⓘ

Save



The image shows a 'Clone List View' dialog box. It has a title bar 'Clone List View'. Below the title bar, there are two text input fields. The first is labeled '*List Name' and contains the text 'My Contacts'. The second is labeled '*List API Name ⓘ' and contains the text 'My_Contacts'. Below these fields, there is a section titled 'Who sees this list view?' with three radio button options: 'Only I can see this list view' (which is selected), 'All users can see this list view ⓘ', and 'Share list view with groups of users ⓘ'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save'.

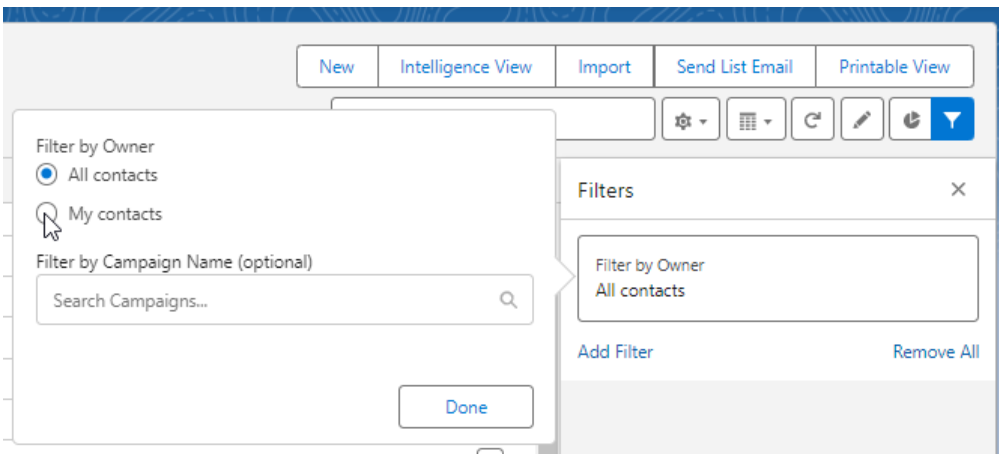
When the tab loads, a filter screen will open on the right side of the screen:



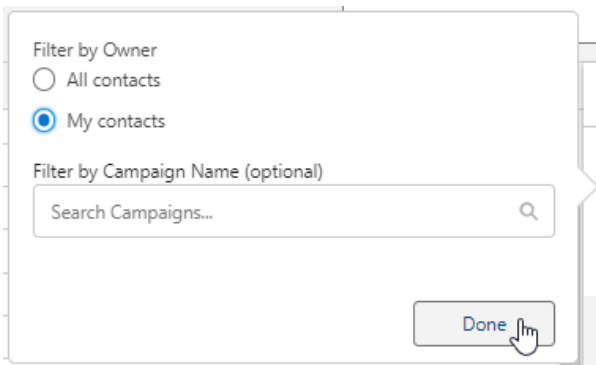
The image shows a screenshot of a software interface. At the top, there are navigation tabs: 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. Below the tabs, there is a toolbar with buttons for 'New', 'Intelligence View', 'Import', 'Send List Email', and 'Printable View'. Below the toolbar is a search bar with the placeholder text 'Search this list...'. Below the search bar is a table with a column header 'Contact Owner Alias ↑' and five rows of data: 'adebo', 'apaul', 'apaul', 'apaul', and 'apaul'. To the right of the table, a yellow 'Filters' panel is open, showing a filter by 'Owner' with the value 'All contacts'. The panel also has 'Add Filter' and 'Remove All' buttons.

These filters allow you to set a number of options. For example, date ranges and fields that must contain or equal a value.

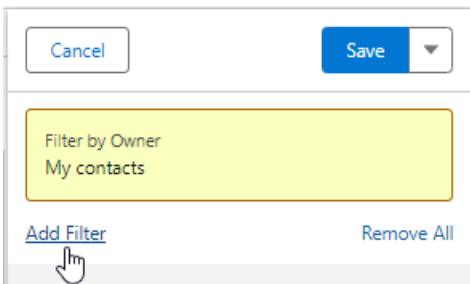
We will select **My Contacts**



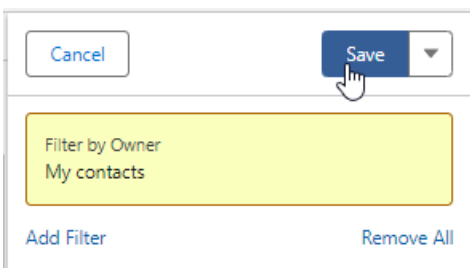
Done



Add additional options through **Add Filter**



Click **Save**

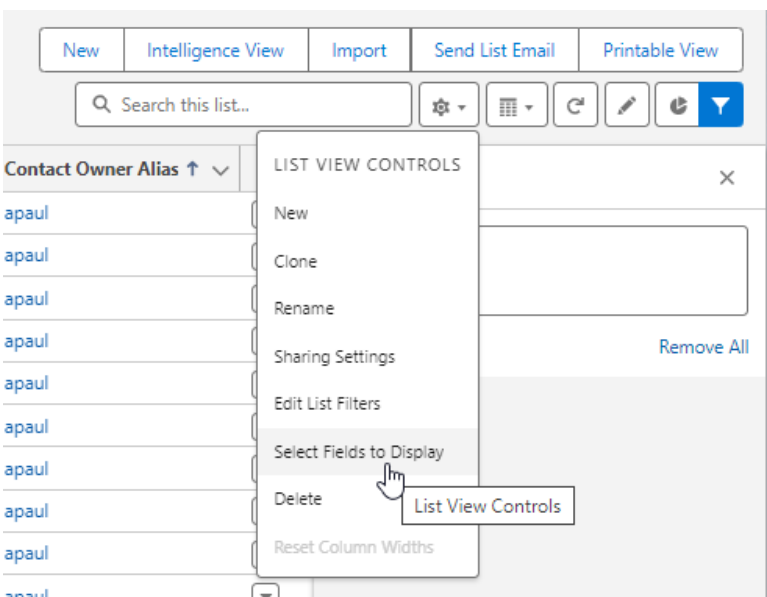


The view will now return all research completed by you.

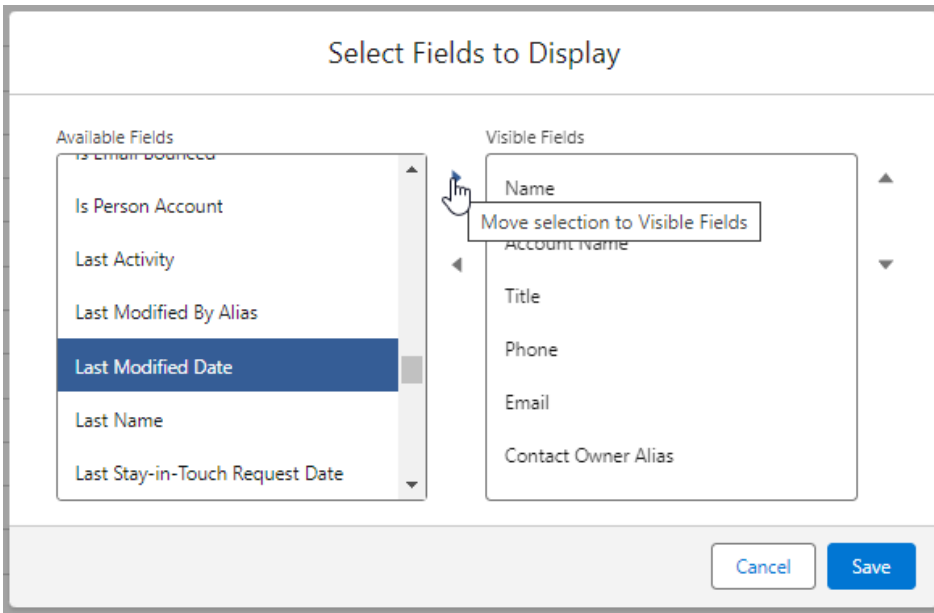
	Name	Account Name	Title	Phone	Email	Contact Owner Alias
1	Susanna West			07555555555	amy.wood@synaptic.co.uk	apaul
2	Les West			07777777712	amy.wood@synaptic.co.uk	apaul
3	Test Client			07777777777	test4@test.com	apaul
4	Test Fryer			07777777777	test@test.com	apaul
5	Chris Smith			07777777771	test@test.com	apaul
6	Ben Smith				test@test.com	apaul
7	Test Smith			01255555555	123@test.com	apaul
8	Casey Cooper.			01222222222	test1245@gmail.com	apaul
9	Mike Smith			01555555555	test123@gmail.com	apaul
10	Jeremy Banks			07777777789	test@test.com	apaul
11	Casey Cooper			07777777779		apaul
12	Test Client A					apaul
13	Steve Test			07777777773	amy.wood@synaptic.co.uk	apaul
14	Client Test				test1@test.com	apaul
15	Jane Doe			07777777777	janetest@test.com	apaul
16	Test Client1			07771111111	amy.wood@capita.co.uk	apaul
17	Mike Smith			07777777771	test@test.com	apaul
18	test client account	test client account				apaul

You are also able to include additional columns to the view through the **List View Controls** dropdown.

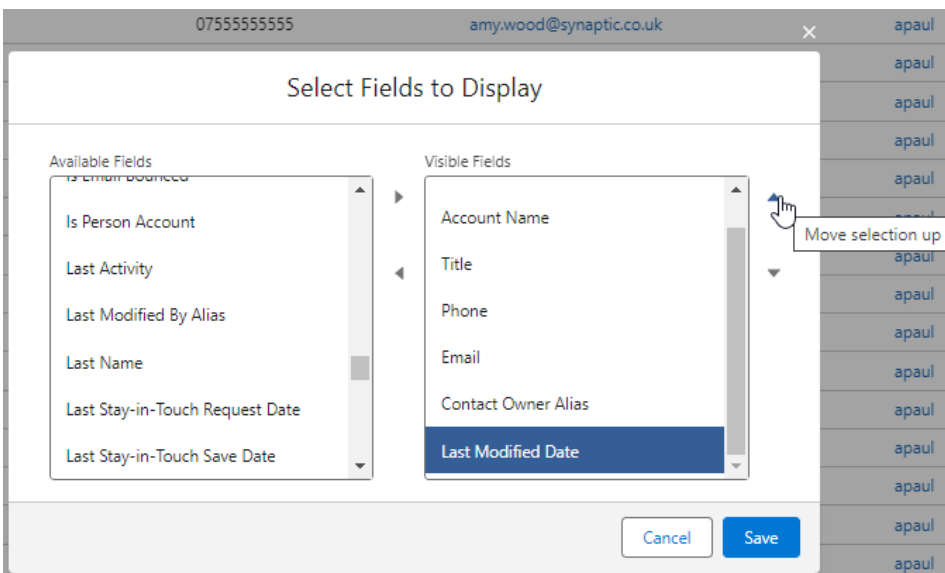
Click **Select Fields to Display**



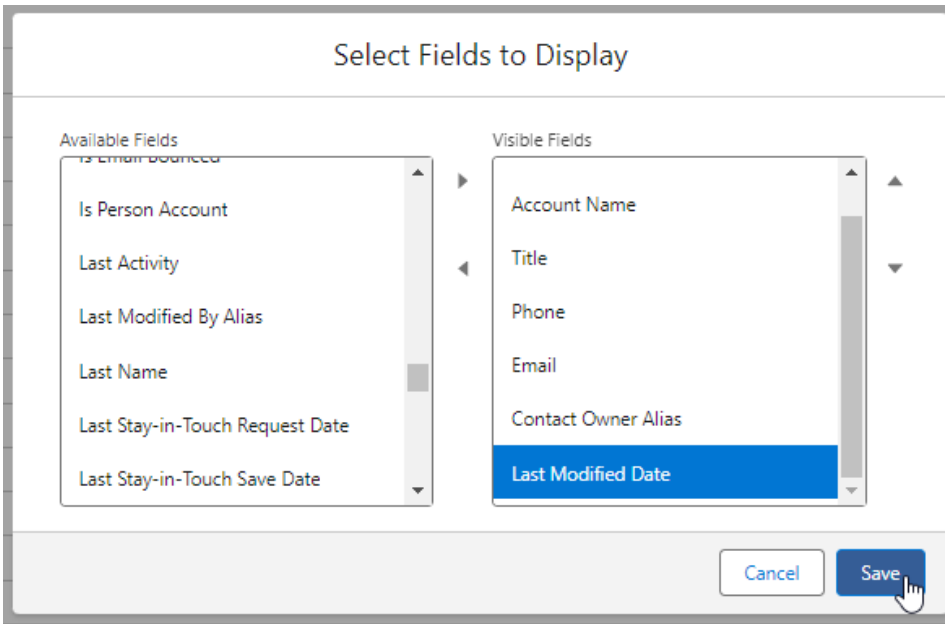
Scroll through the list of **Available fields**. Select an option and use the arrow to move the field over to **Visible Fields**



The field will be added to the bottom of the list. Select the field and use the arrows to move the selection up or down the list. This reflects the order of the list view.

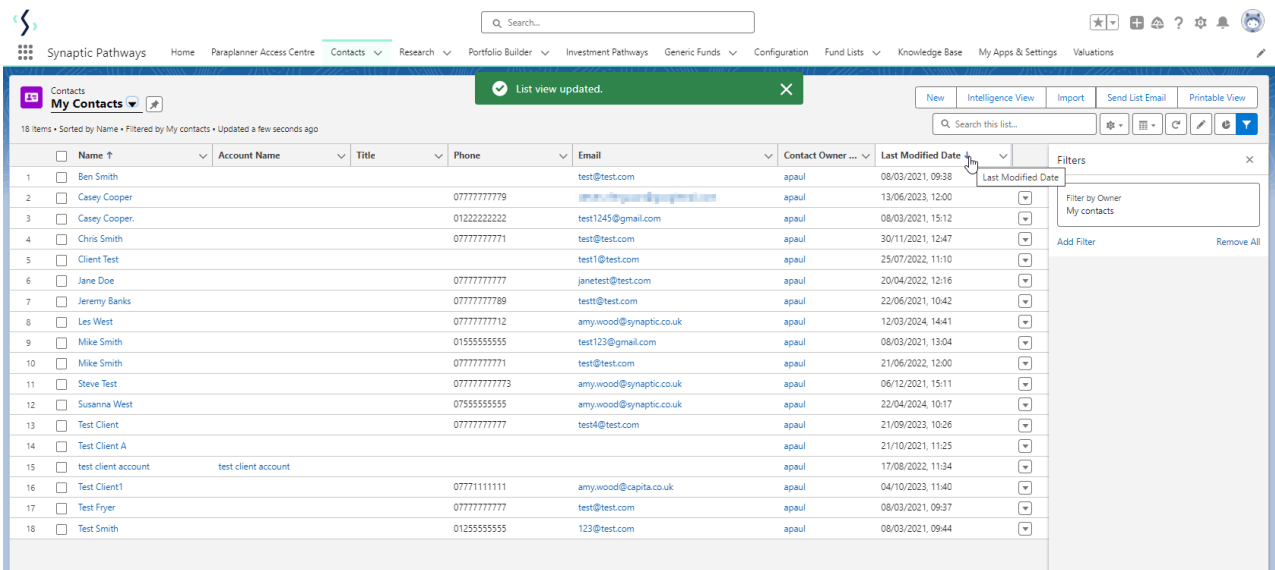


Save



The view has now been updated.

Each column can be sorted:



Multiple views can be created or cloned through the **List View Controls** area.

View all lists through the dropdown:



Contacts

My Contacts ▾

18 items

LIST VIEWS

- All Contacts
- 1 Birthdays This Month
- 2 My Contacts
- 3 New This Week
- 4 Recently Viewed
- 5
- 6 Recently Viewed Contacts (Pinned list)