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

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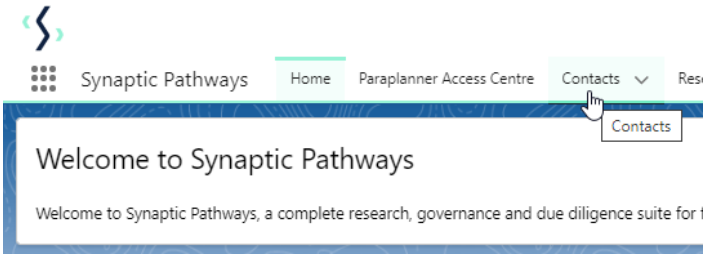
List Views can be configured within Synaptic Pathways. In this article, we will take you through cloning an existing view & creating multiple views to show the information you require.

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

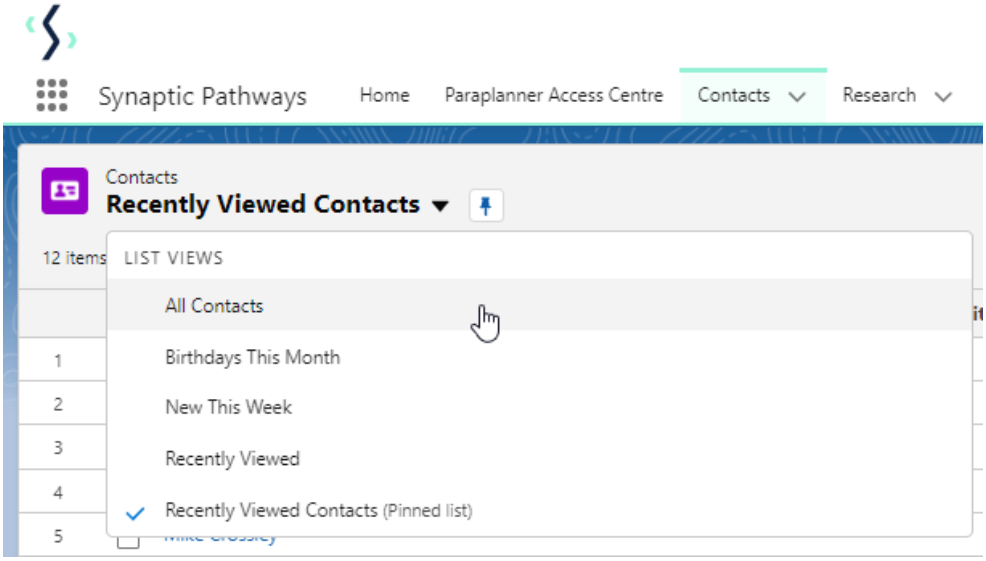
For example, If you have more than one licence in your company, you may want to set a view to show only your clients, configure the portfolio builder tab to show your portfolios or set the research tab to list all your research.

In this article, we will configure the Contacts tab.

Navigate into the Contacts tab:



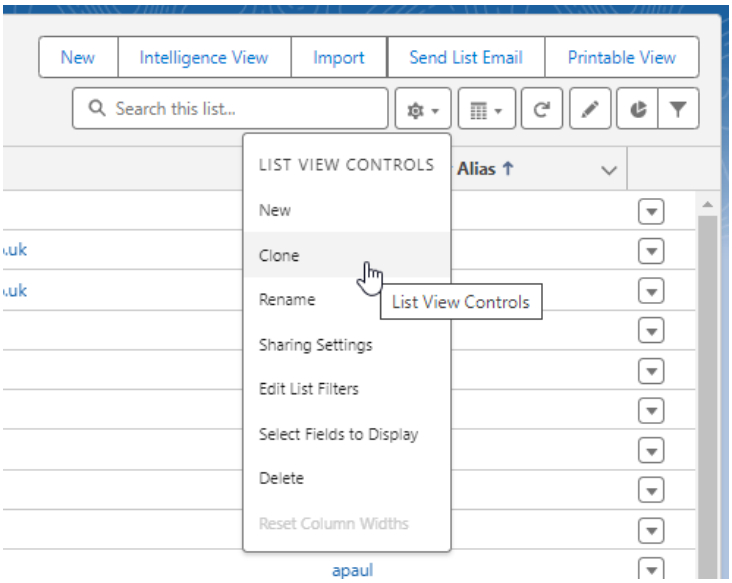
Once within the Contacts tab, click the down arrow next to **Recently Viewed Contacts** and select **All Contacts**



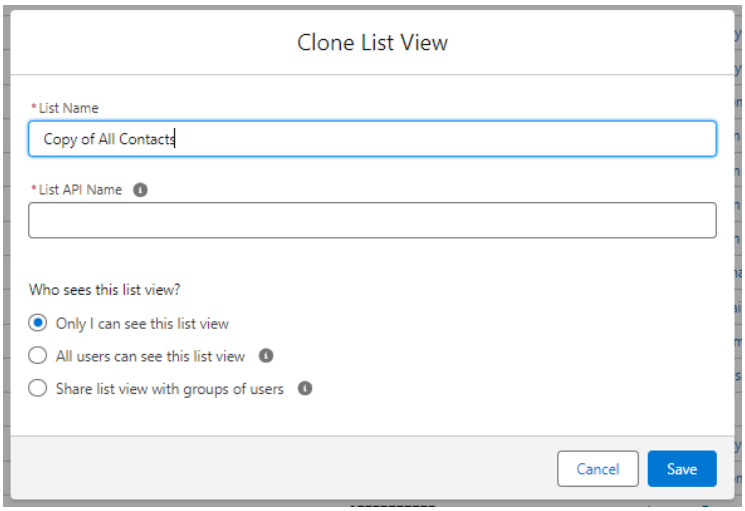
The **All Contacts** view can be pinned if you would prefer to view all contacts rather than recently viewed. Note: This will include all contacts within your company.

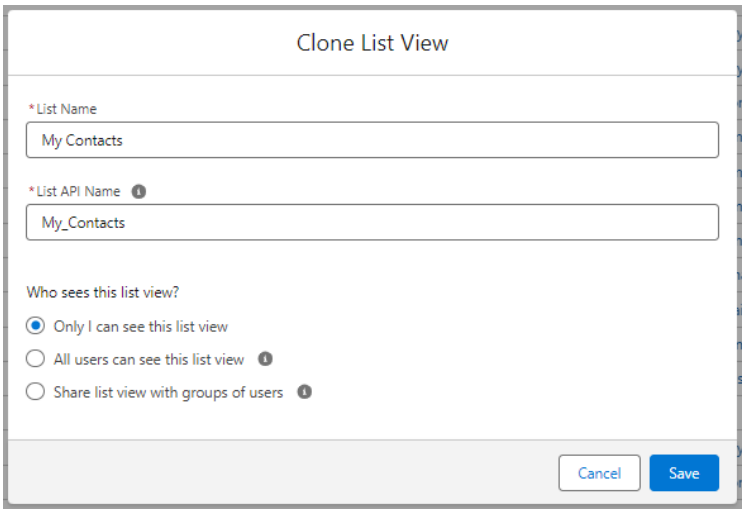
We will clone the **All Contacts** view and configure this to only pull through clients you have created.

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

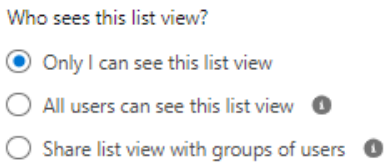


Keep the default **List Name** or enter you own:

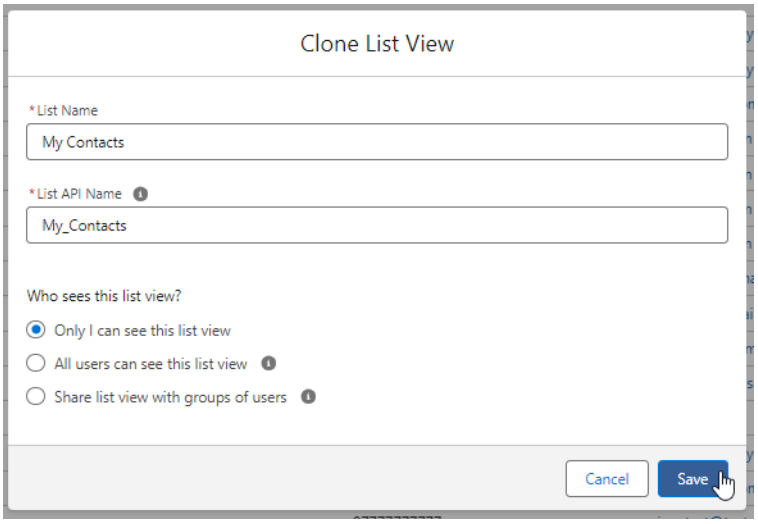




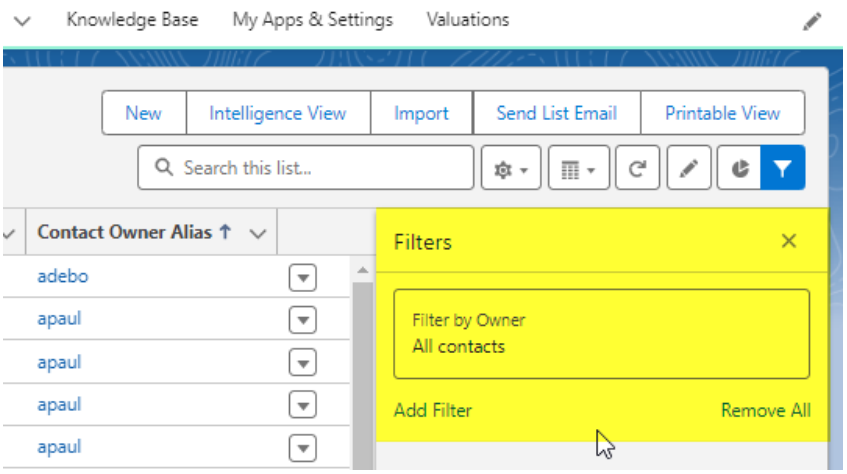
Set the permissions of the list. In this case, only you will be able to see this list view.



Save

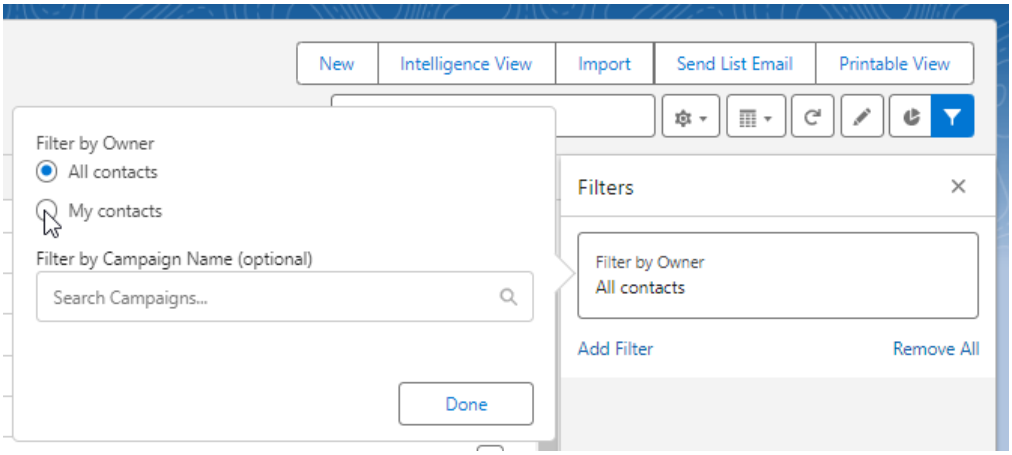


When the tab loads, a filter screen will open on the right side of the screen:

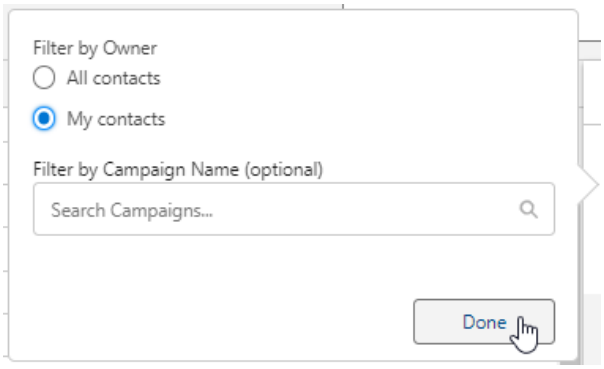


These filters allow you to set a number of options. For example, date ranges and fields that must contain or equal a value.

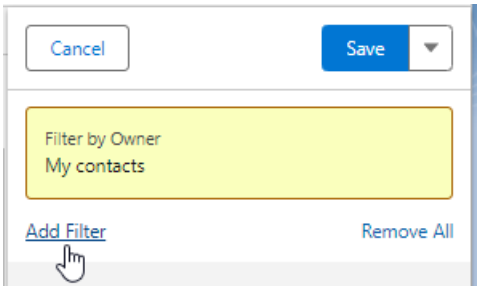
We will select **My Contacts**



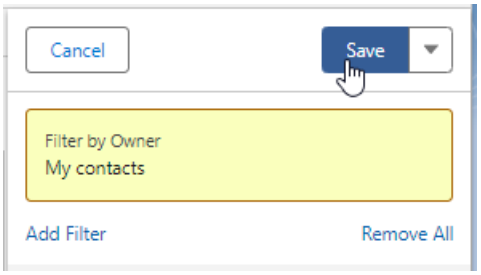
Done



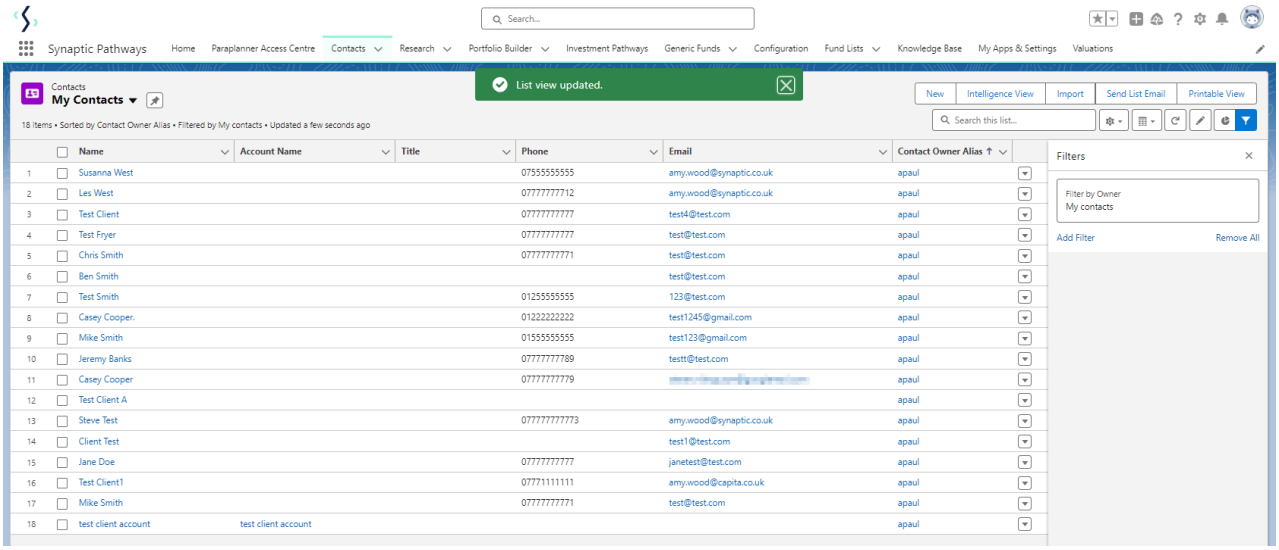
Add additional options through **Add Filter**



Click **Save**

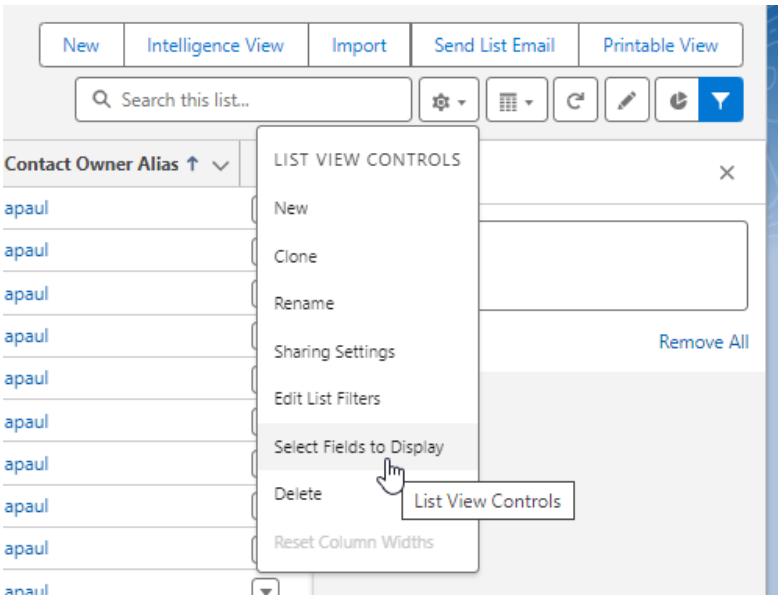


The view will now return all research completed by you.

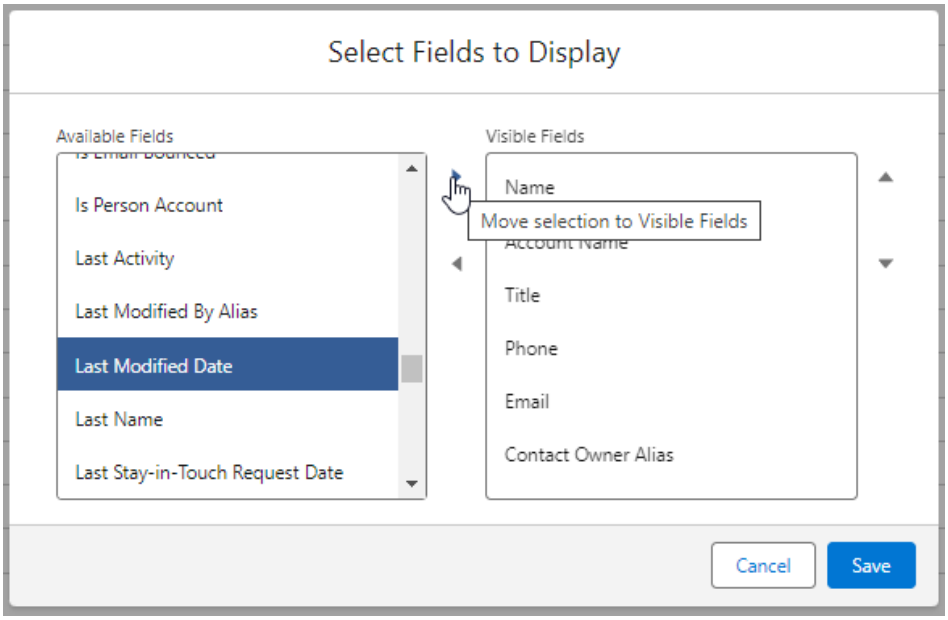


You are also able to include additional columns to the view through the **List View Controls** dropdown.

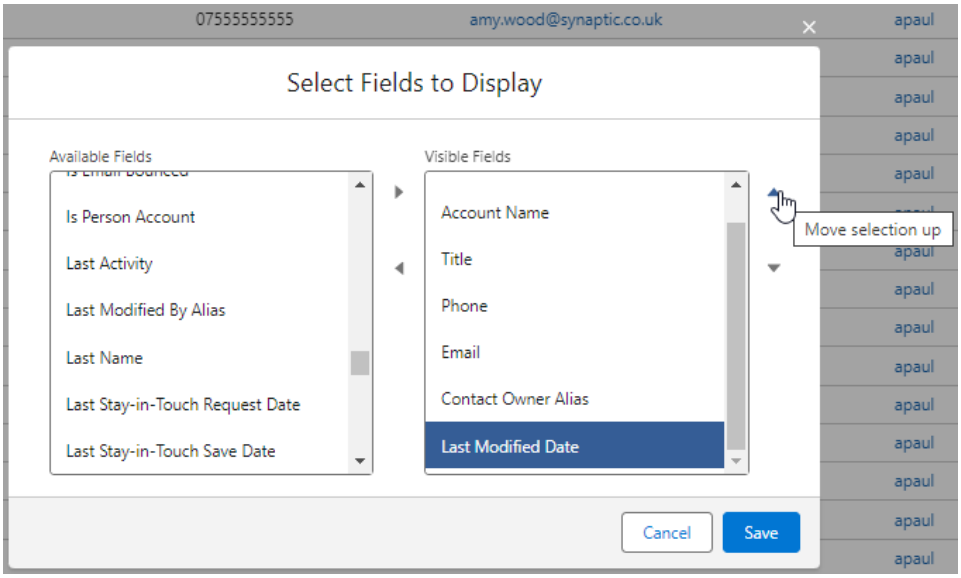
Click **Select Fields to Display**



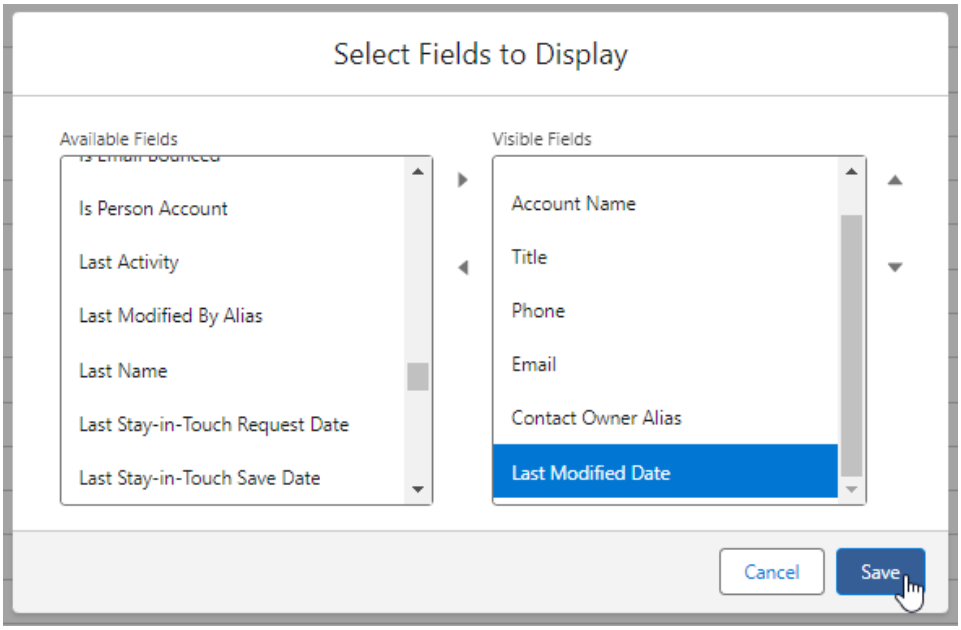
Scroll through the list of **Available fields.** Select an option and use the arrow to move the field over to **Visible Fields**



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.

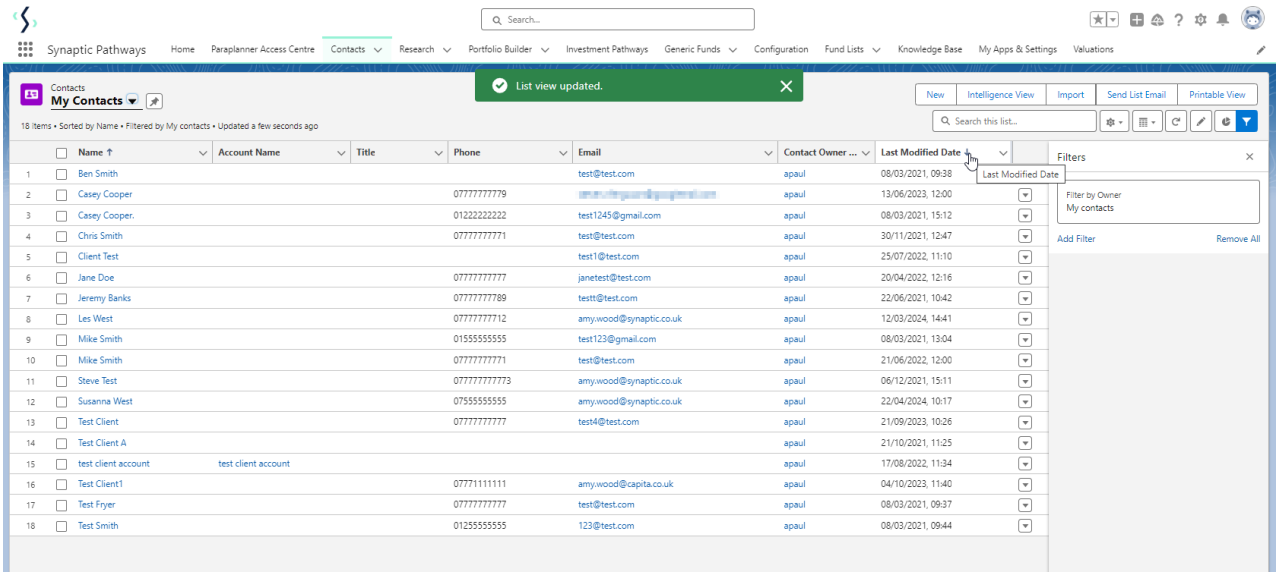


Save



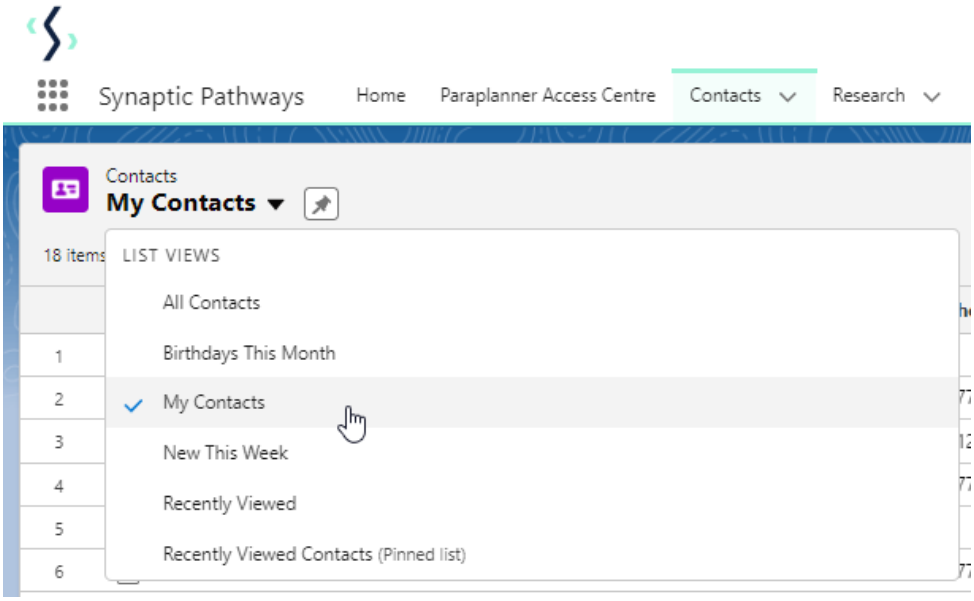
The view has now been updated.

Each column can be sorted:



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

View all lists through the dropdown:


Synaptic Pathways
Home
Paraplanner Access Centre
Contacts
Research
Contacts
My Contacts
18 items
LIST VIEWS
All Contacts
Birthdays This Month
My Contacts
New This Week
Recently Viewed
Recently Viewed Contacts (Pinned list)
1
2
3
4
5
6