

Homepage

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See below for key areas on the Synaptic Pathways Homepage:

The image shows a screenshot of the Synaptic Pathways homepage with several callout boxes pointing to specific features:

- Navigate home at any time**: Points to the navigation bar at the top of the page.
- Search for Contacts, Portfolios, Attitude to Risk Questionnaires, Research, and Illustrations here.**: Points to the search bar in the navigation bar.
- Access features through the navigation bar. For e.g. Research, Portfolio Builder and Valuations**: Points to the navigation bar.
- Recently viewed contacts**: Points to the 'Recent Contacts (3)' sidebar on the right.
- Explore the Contact area, Investment Pathways and Portfolios through these quick links**: Points to the 'Your Clients', 'View Investment Pathways', and 'View and Build Portfolios' sections.
- This includes any recently viewed items – for e.g. Attitude to Risk Questionnaires, Research, Illustrations and Portfolios**: Points to the 'Recent Items (3)' sidebar on the right.
- Global Actions - Quick create actions**: Points to the star icon in the bottom navigation bar.
- Salesforce Help**: Points to the question mark icon in the bottom navigation bar.
- Notifications**: Points to the bell icon in the bottom navigation bar.
- Salesforce Setup**: Points to the gear icon in the bottom navigation bar.
- View Profile**: Points to the user profile icon in the bottom navigation bar.

The homepage content includes a header with the Synaptic Pathways logo and tagline 'Research and due diligence software for financial advice.' Below this is a navigation bar with tabs for 'RISK EXPLORER', 'COMPARISON + EX-ANTE', 'EX-POST REVIEW', 'SWITCHING', and 'CASHFLOW'. The main content area features three columns of quick links: 'Your Clients', 'View Investment Pathways', and 'View and Build Portfolios'. On the right, there are two sidebar sections: 'Recent Contacts (3)' listing three test clients and 'Recent Items (3)' listing three test items.

