

Income Analysis - Creating Research

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Create Income Analysis research through the Contact record.

Navigate to **Contacts** tab:

The screenshot shows the Synaptic Pathways dashboard. The navigation menu at the top includes: Synaptic Pathways, Home, Paraplanner Access Centre, **Contacts** (highlighted), Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. The main content area features a welcome message, the Synaptic Pathways logo, and navigation tabs for RISK EXPLORER, COMPARISON + EX-ANTE, EX-POST REVIEW, SWITCHING, and CASHFLOW. Below these are three sections: 'Your Clients', 'View Investment Pathways', and 'View and Build Portfolios'. On the right side, there are two panels: 'Recent Contacts (3)' listing three test clients with their details, and 'Recent Items (3)' listing three test items.

<https://synapticpathwaysuat.lightning.force.com/lightning/o/Contact/home>

This is a close-up of the navigation menu. The 'Contacts' tab is highlighted, and a mouse cursor is pointing at it. The menu items visible are: Synaptic Pathways, Home, Paraplanner Access Centre, **Contacts**, and Res.

Find your client in the list or search:



Contacts
Recently Viewed Contacts

6 items • Sorted by Name • Filtered by Recently Viewed • Updated a few seconds ago

| | Name ↑ | Account Name |
|---|-------------------------------------|---------------------|
| 1 | Ben Smith | |
| 2 | Mike Smith | |
| 3 | Steve Test | |
| 4 | Test Client | |
| 5 | test client account | test client account |
| 6 | Test Client1 | |

Test Client1

Scroll down to **Income Analysis** and click **New**:

Contact: Mr. Test Client1

Follow Edit New Contact New Opportunity

Related Details Medical Holdings Related Contacts Family ALUM

We found no potential duplicates of this Contact.

Client Questionnaires (1)

| Client Questionnaire Name | Completed... | Risk Category | Risk Rating | Default ↑ |
|-----------------------------------|--------------|--------------------------------|-------------|-----------|
| ATR Questionnaire | No | Moderately Cautious (High End) | 4 | |

Risk Illustrations (1)

| Illustration Name | Description... | Target Risk Category | Term | Review Date |
|-----------------------------------|----------------|--------------------------------|------|-------------|
| Risk Illustration | | Moderately Cautious (High End) | 10 | |

Research (0) [New](#)

Income Analysis (0) [New](#)

Protection (0) [New](#)

Opportunities (0) [New](#)

Cases (0) [New](#)

Recent Items (3)

- [ATR Questionnaire](#) Contact: Test Client1
- [Test Questionnaire](#) Contact: Test Client
- [Test](#) Contact: Susanna West

Activity Chatter

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Complete **New Income Analysis** details:

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

Description
Test Description

* Review Date
19/10/2024

Calendar: October 2024. Date 19 is selected.

Buttons: Save & New, Save, New

Save

New Income Analysis

* = Required Information

Information

* Client Name
Test Client1

* Goal Name
Income Analysis Research

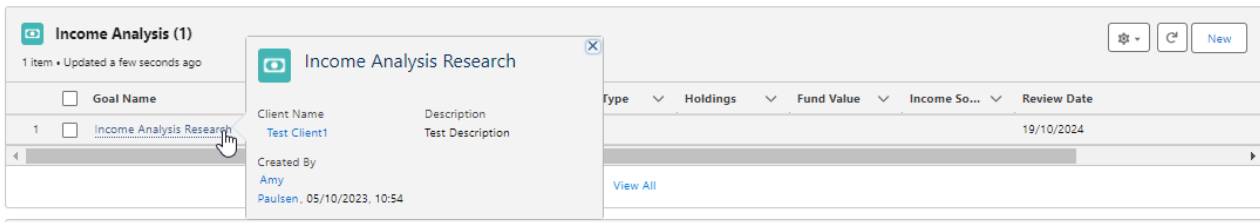
Description
Test Description

* Review Date
19/10/2024

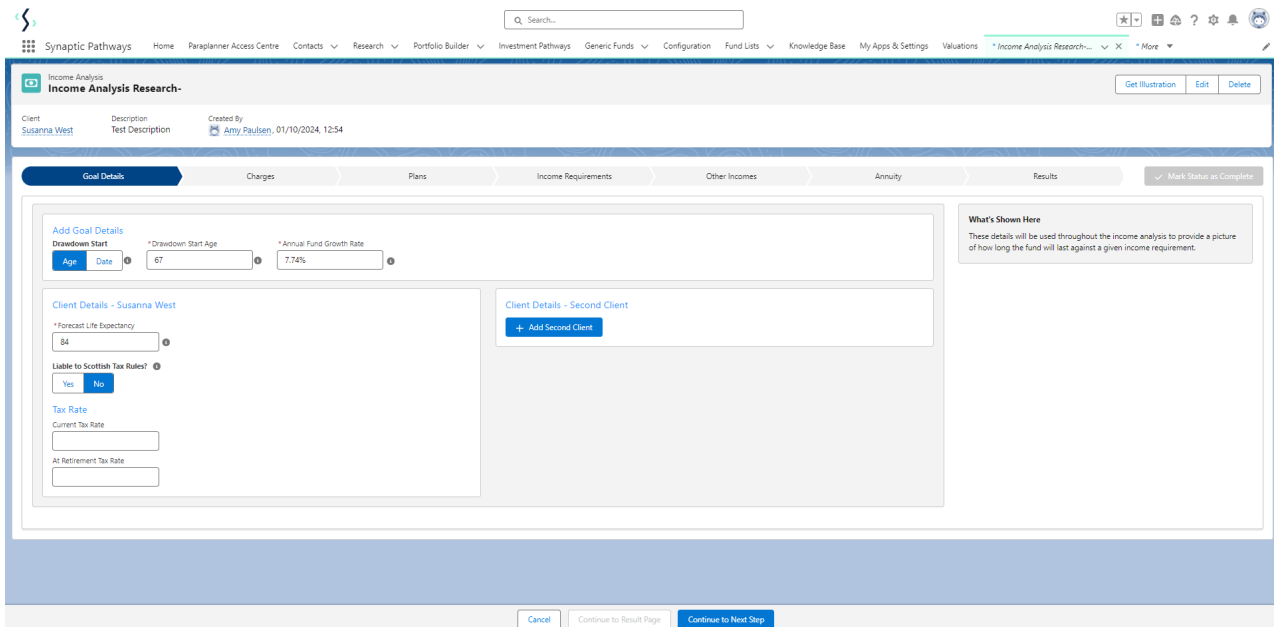
Buttons: Cancel, Save & New, Save

Click into the below link or into the newly created research:

Income Analysis "Income Analysis Research" was created.



This will take you into the **Add Goal Details** screen:



For further information on Income Analysis research, see article [Income Analysis - Add Goal Details](#)

If you would like to complete joint life research, see article [Income Analysis - Joint Life - Create Research](#)