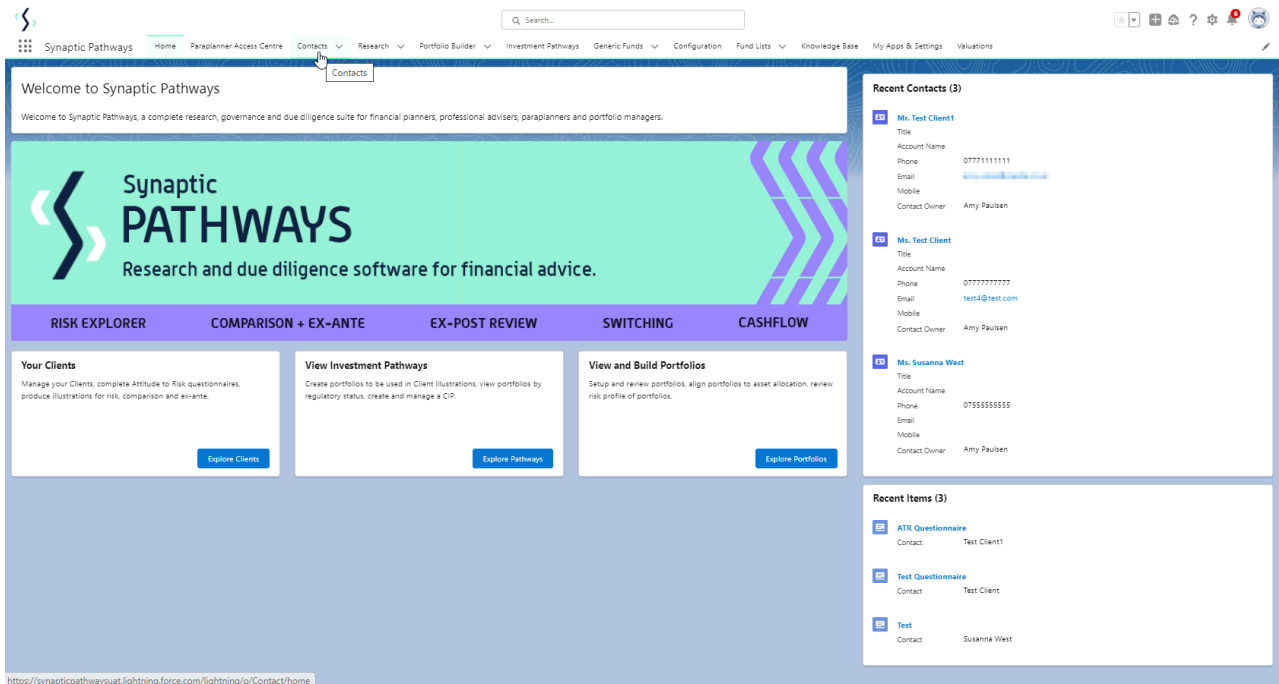


Income Analysis - Creating Research

20/02/2025 1:52 pm GMT

Create Income Analysis research through the Contact record.

Navigate to **Contacts** tab:



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



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	<input type="checkbox"/> Ben Smith	
2	<input type="checkbox"/> Mike Smith	
3	<input type="checkbox"/> Steve Test	
4	<input type="checkbox"/> Test Client	
5	<input type="checkbox"/> test client account	test client account
6	<input type="checkbox"/> 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

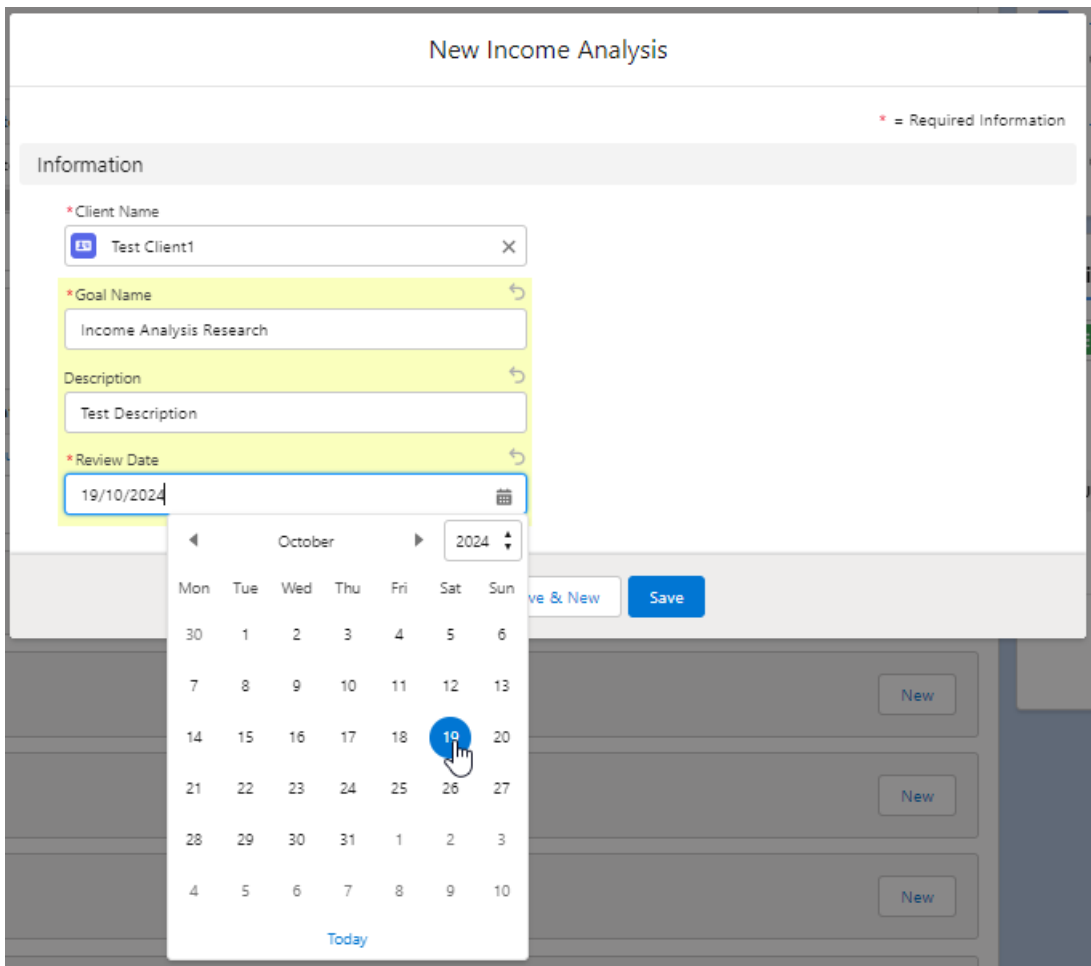
Filters: All time • All activities • All types

Upcoming & Overdue

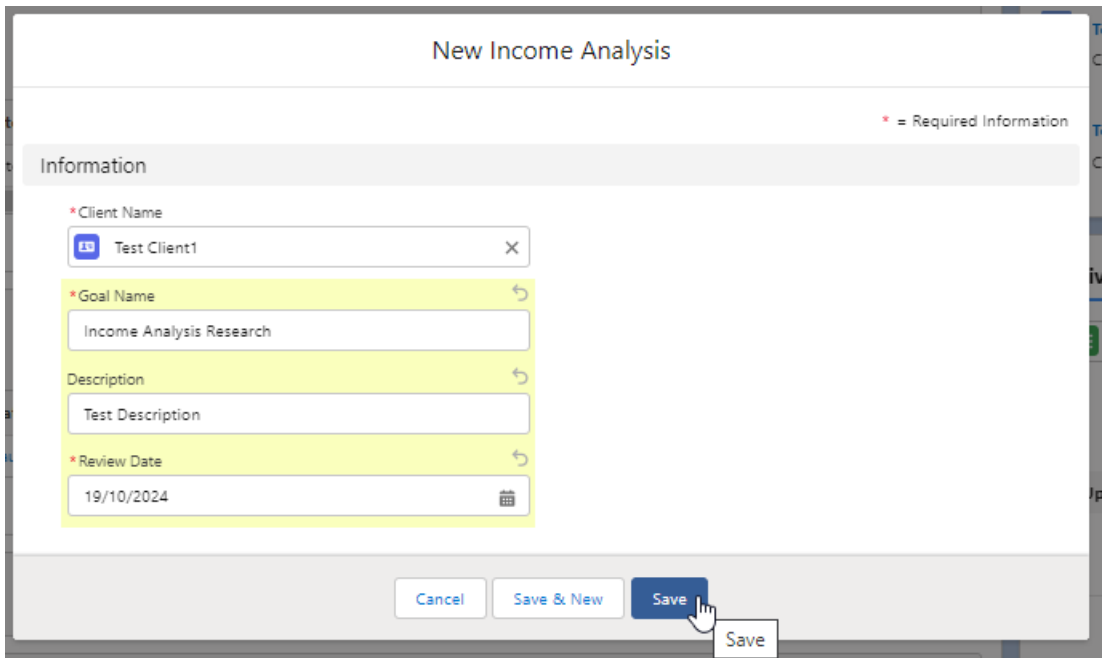
No activities to show.
Get started by sending an email, scheduling a task, and more.

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

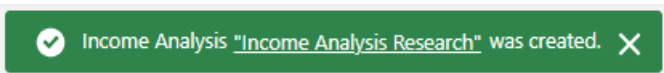
Complete **New Income Analysis** details:

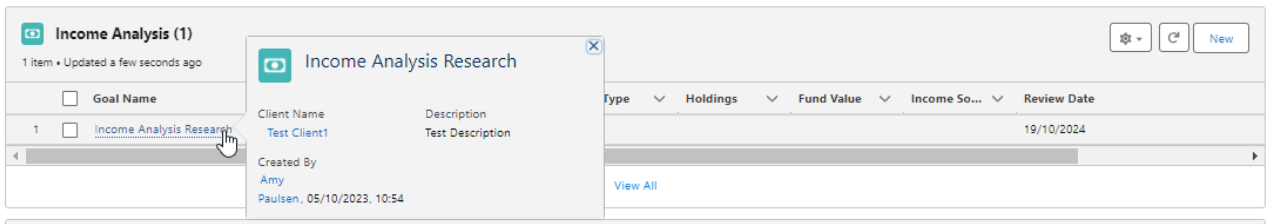


Save

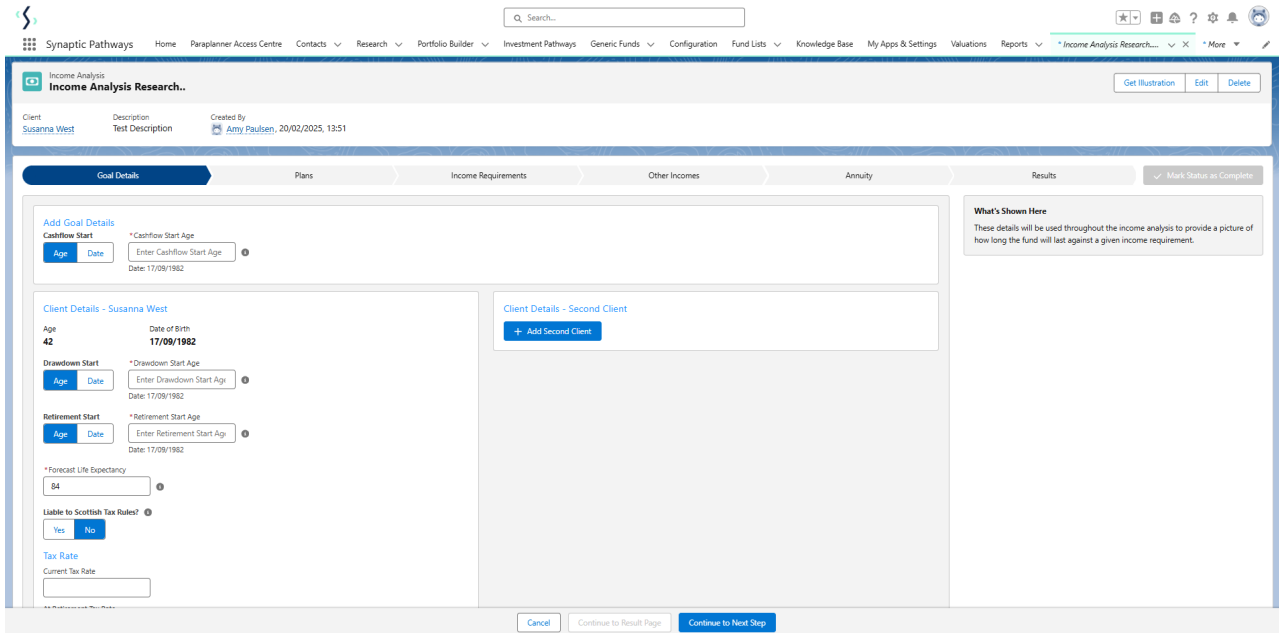


Click into the below link or into the newly created research:





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](#)