Importing client details

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Importing client details

Using the app you can import client details from intelliflo to your Synaptic Pathways account.

If you are an existing Synaptic Pathways user, log into your account. New users to Synaptic Pathways will be directed to sign up for a free trial.

Select a **Client** record and go to **Client Actions.** Click on the Synaptic research tool you wish to use listed under **iO Store Apps** (Synaptic ATRQ, Comparison, Ex-Ante....)

ashboard					
Client: Test Tester (454d	ec20-f058-426b-a6ee-3164947d5a4	9:1672230994)	Client Actions		
Client Administration	Client Income Management	Client Portfolio Management	Client Servicing	iO Store Apps	
Add Address	Add Client Payment Split	Add Asset	Add Appointment	Open Client in Synapti	
Add Bank Account	Add Fee	Get New Illustration	Add Event List	SmartSearch AML check	
Add Contact	Add Retainer	Get New Quote	Add Goal	SmartSearch AML TEST	
Add Note	Add Split Template Group	Launch Calculators	Add Opportunity	Staging Financial Vuln	
Add Relationship		Link to Model Portfolio	Add Plan	Synaptic Analyser	
Change 3rd Party Ref		Source Mortgage	Add Service Case	Synaptic ATRQ	
Change Client Ref		Start Fund Analysis	Add Task	Synaptic Comparison	
Change Migration Ref			Add Workflow	Synaptic Ex-Ante	
Export Client Data			Compose Email	Synaptic Risk	
ink to DMS			Upload Document	Synaptic Suite - TEST	
Verge Client			Verify ID	Synaptic Suite - UAT	
Restrict Processing				Synaptic Switch	
Shara Client					

A loading screen will display to inform you the client details are importing

F Importi	Please wait ng contact from Intelliflo
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As soon as the client details have been successfully imported you will be taken to the relevant page on the research tool you selected.

For example, if you selected Synaptic ATRQ, a new Attitude to Risk Questionnaire will be created for the contact in Synaptic Pathways populated as below ready for you to continue.

	New Attitude To Risk Questionnaire		
nformation			
*Risk Questionnaire Name	Owner		
Test Tester ATRQ			
	Cancel Save & New Save		

Client personal details will display in the **Contact > Details** tab

Te	est Tester 🔺					
tle	Account Name	Phone (2) 🔻	Email	Contact Owner		
Related	d <u>Details</u>	Medical	Holdings	Related Contacts	Family AUM	
Contact	Owner					
Name Test Te	ster					
Account	t Name					
Birthdat 29/12/	e 1983					
Occupat	tion					
Sex Malo						

Please note: If you do not have your Salesforce org open you will be prompted to sign in

sa	lesforce
To access this page, you	have to log in to Salesforce.
Username	1 Saved Username
Password	
	Log In
Remember me	

Once you have logged in with Salesforce you will then see a message box informing you that the import

is in progress.

Link to next article Importing holdings