Importing client details

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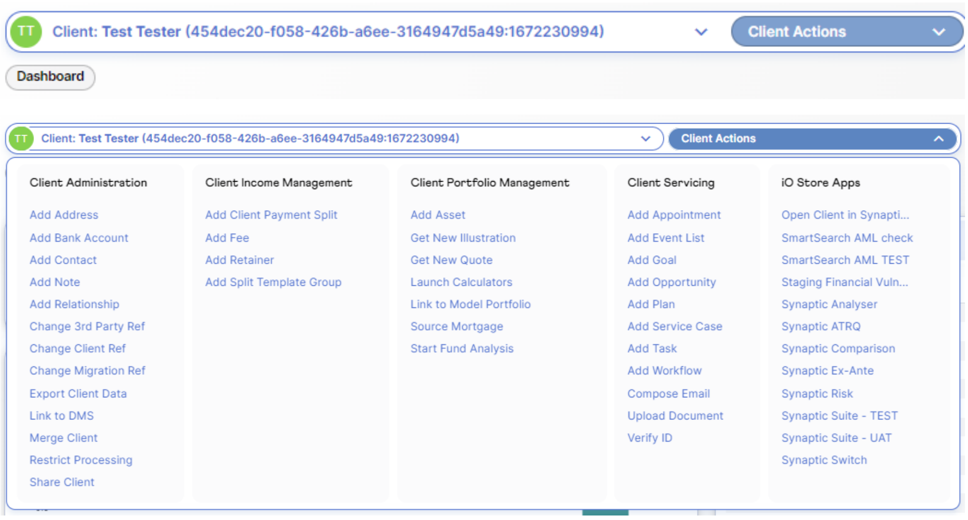
Importing client details

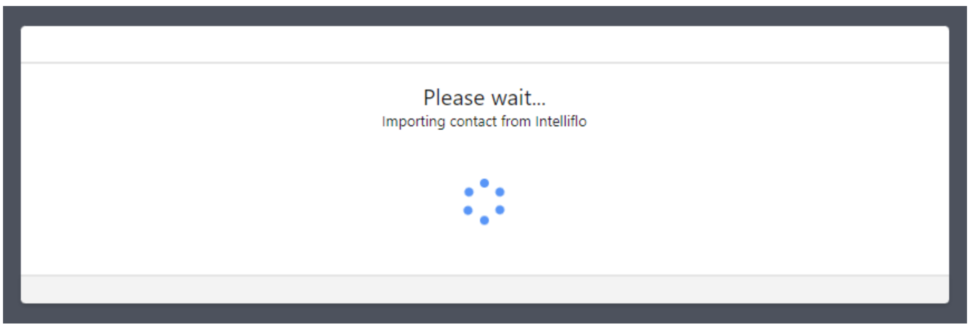
Using the app you can import client details from intelliflo to your Synaptic Pathways account.

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….)

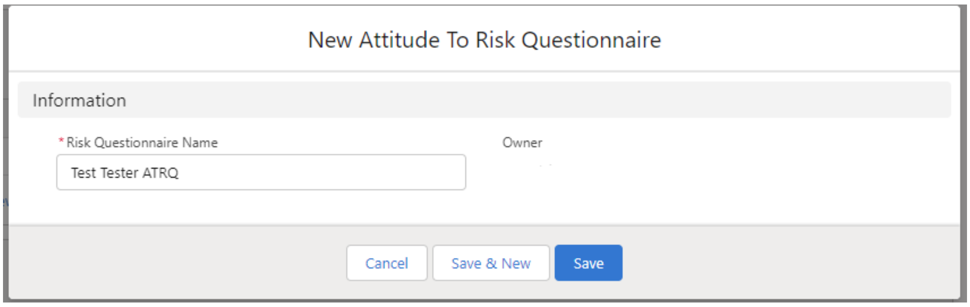


A loading screen will display to inform you the client details are importing

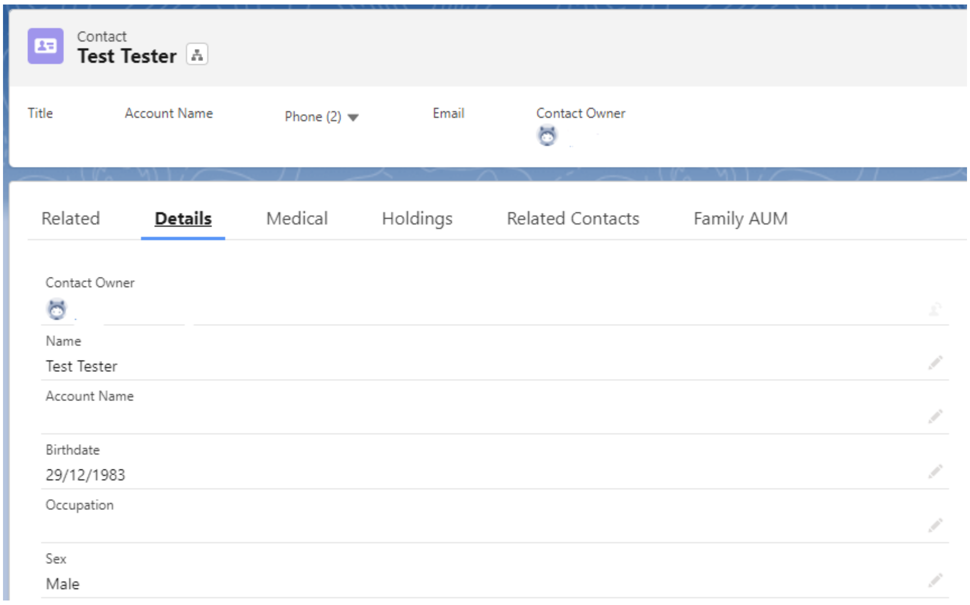


As soon as the client details have been successfully imported you will be taken to the relevant page on the research tool you selected.

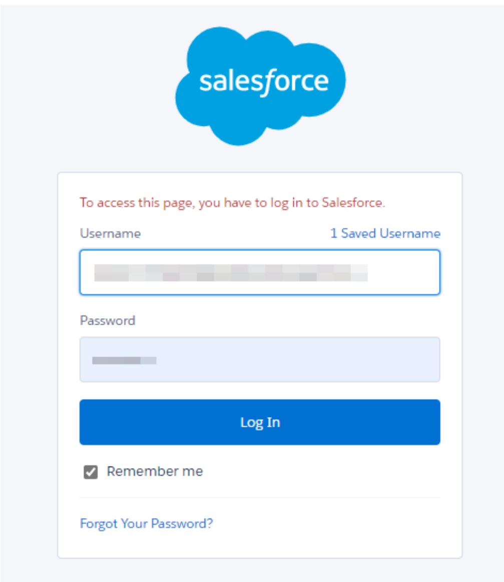
For example, if you selected Synaptic ATRQ, a new Attitude to Risk Questionnaire will be created for the contact in Synaptic Pathways populated as below ready for you to continue.



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



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



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**