

Creating a Protection quote

Last Modified on 28/02/2024 3:12 pm GMT

If you haven't already, ensure your credentials have been completed in My Apps & Settings - [Entering your Synaptic Webline Credentials.](#)

Navigate to the **Contact** record:

The screenshot shows the Synaptic Pathways web application. The top navigation bar includes 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', and 'Research'. A dropdown menu is open under 'Contacts', showing a 'Contacts' option. Below the navigation bar, a welcome message reads: 'Welcome to Synaptic Pathways' and 'Welcome to Synaptic Pathways, a complete research, governance and due diligence suite for financial plar'. The main content area displays a table of contacts. The table has columns for Name, Account Name, Title, Phone, Email, and Contact Owner Alias. There are four rows of contact data.

	Name	Account Name	Title	Phone	Email	Contact Owner Alias
1	Susanna West			07355555555	amy.wood@synaptic.co.uk	apaul
2	Les West	Susanna West		0777777712	testles@gmail.com	apaul
3	Hermione West			01888888933	hermionew@test.com	mhall
4	John Smith				john.smith@synaptic.com	pava

Scroll down to **Protection** and click **New**

The screenshot shows the Synaptic Pathways interface for contact Ms. Susanna West. The top navigation bar includes sections like Synaptic Pathways, Home, Paraplanner Access Centre, Contacts, Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. The main content area is divided into several sections:

- Income Analysis (3)**: A table with columns for Goal Name, Income Re..., Goal Type, Holdings, Fund Value, Income So..., Review Date, and Convert To. It lists three items, all named 'Income Analysis'.
- Protection (3)**: A table with columns for Protection Name, Description, and Created Date. It lists three items: 'Test Protection', 'Test Life Assurance', and 'Test Protection'. A red box highlights the 'New' button in the top right corner of this section.
- Opportunities (0)**: A section with a 'New' button.
- Cases (0)**: A section with a 'New' button.
- Off-Platform Holdings (3)**: A section with a 'New' button and a table with columns for Name, Provider N..., Contract R..., Current Va..., Type (Basis) Name, Product Name, and Status.

Complete details and **Save**

The 'New Protection' form is displayed with the following fields and controls:

- Information** section header.
- * Protection Name**: A text input field containing 'Protection Quote Test'.
- * First Life**: A dropdown menu showing 'Susanna West'.
- Description**: A text area containing 'Test Description Text'.
- At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'. A mouse cursor is clicking the 'Save' button, which has a tooltip that also says 'Save'.

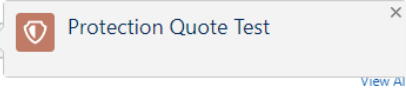
✓ Protection "Protection Quote Test" was created. ✕

Click into the quote:

Protection (3) ⚙️ 🔄 New

3 items • Updated a few seconds ago

<input type="checkbox"/>	Protection Name	Description	Created Date	
1	<input type="checkbox"/> Test Life Assurance		20/02/2024, 15:23	⌵
2	<input type="checkbox"/> Test Protection		21/02/2024, 13:26	⌵
3	<input type="checkbox"/> Protection Quote Test		22/02/2024, 11:33	⌵


View All

See next article: [Selecting Benefits](#)
