

Creating a Special Deal on a Contact record

Last Modified on 18/04/2024 10:42 am BST

Client special deals will be used above firm, network and portfolio deals. They are created within the Contact record.

Navigate to the contact record:

Name	Account Name	Title	Phone	Email	Contact Owner Alias
Casey Cooper			0777777779	amy.wood@synaptic.co.uk	apaul
Casey Cooper			0122222222	test1245@gmail.com	apaul
Casey Sharon Cooper			01678954321	amy.wood@synaptic.co.uk	smith
Les West			0777777712	amy.wood@synaptic.co.uk	apaul
John Dowling					mcros
John Dowling					mcros
John Dowling			0		rchum
Steve Test			0777777773	amy.wood@synaptic.co.uk	apaul
Steve Test			+447913132801	amy.wood@synaptic.co.uk	sferg
Susanna West			0755555555	amy.wood@synaptic.co.uk	apaul
Test Client	Susanna West		0777777777	test4@test.com	apaul
Test Client			0777111111	amy.wood@synaptic.co.uk	apaul

Navigate into the **Special Deals** tab:

Client Questionnaire Name	Completed by Con...	Risk Category	Risk Rating	Default	CFLQ Com...
Attitude to Risk Questionnaire	Yes	Moderately Adventurous	4.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test ATR 2	No	Moderately Adventurous	4.00	<input type="checkbox"/>	<input type="checkbox"/>
Test ATR Feb24	Incomplete			<input type="checkbox"/>	<input type="checkbox"/>

Click the **New** button:

Contact
Ms. Susanna West

Title Account Name Phone (2) Email Contact Owner
0755555555 amy.wood@synaptic.co.uk Amy Paulsen

Related Details Medical Holdings Related Contacts Family AUM **Special Deals**

Special Deals (0) New

Select **Platforms** or **Off-Platforms Products**

Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Contact
Susanna West

Select Search Type
Platforms Off Platform Products

Search

* Name
Enter Name of Special Deal...

Description
Enter Description

Cancel Save & New Save

Select a Platform/Off-Platform Product from the drop down:

Search

- Elevate
- James Hay Modular iPlan
- James Hay Partnership Wrap
- Parmenion
- Raymond James - Option 1
- Raymond James - Option 2

Complete the **Name** field. The description box is optional.

Save

Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Contact

Select Search Type

* Name

Description

This will load the Special Deal page.

Synaptic Pathways

Name
Parmenion S West Deal

Provider
Parmenion

Platform
All Platform Products

Special Deal Type
Client

Client Name
Susanna West

Deal Start Date (leave blank to apply from today)

Deal End Date (leave blank for no expiry date)

Last Modified Date
Thu, 18 Apr 24

Last Modified By
Amy Paulsen

Special Deal Charge Type

Special Deal Charge Details

About Special Deal

Platform Charges

Charge Tier Name
Platform AMC

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£299,999.99	0.30		All
£300,000.00	£599,999.99	0.25		All
£600,000.00	£1,499,999.99	0.20		All
£1,500,000.00		0.15		All

Charge Tier Name
GIA Standard Switch Transaction Charge

Tier Start	Tier End	Rate %	Rate £	Fund Type
			0.45	All

Individual Savings Accounts

Edit the provider published charge tiers to apply the special deal you have agreed with the provider.

Change the existing tiers or add and remove new tiers.

Use the **Revert** Action to return to the default published charge details.

From time to time published charges may be revised or removed by the provider, in the event of a change a warning notification will appear to indicate the special deal needs attention.

Special Deals are applied when an illustration is requested, only **Active** Deals are applied.

Client special deals are completed in the same way as firm special deals. See article [Creating Special Deals](#) or view video [Creating Special Deals - Video](#)

In the below example we have tweaked the **Rate%** and **Save**

Platform Charges

Platform Charges

Charge Tier Name
Platform AMC

View Provider Charges View Network Charges

Revert to Provider Charges

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£299,9...	0.25		All		
2	£300,0...	£599,9...	0.20		All		
3	£600,0...	£1,499,...	0.15		All		
4	£1,500,...		0.10		All		

Cancel Save

Once saved, the special deal will be highlighted in green:

Platform Charges

Charge Tier Name
Platform AMC

View Provider Charges View Network Charges

Revert to Provider Charges

	Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£299,999.99	0.25		All
2	£300,000.00	£599,999.99	0.20		All
3	£600,000.00	£1,499,999.99	0.15		All
4	£1,500,000.00		0.10		All

Navigate back to the contact once complete:

Synaptic Pathways Home Paraplanner Access Centre **Contacts** Research Portfolio Builder Investme

Search...

Name
Parmenion S West Deal

Active Not Active

Special Deal Charge Type

Platform Charges

Platform AMC

- + New Contact
- Recent records**
- Susanna West
- Test Client
- Les West
- Casey Sharon Cooper
- Casey Cooper
- Recent lists**
- Recently Viewed Contacts
- All Contacts

Special Deal Type
Client

Client Name
Susanna West

View your created deal



Contact

Ms. Susanna West

Title

Account Name

Phone (2) ▼

0755555555

Email

amy.wood@synaptic.co.uk

Contact Owner

Amy Paulsen

Related

Details

Medical

Holdings

Related Contacts

Family AUM

Special Deals



Special Deals (1)

New

Special Deal Name	Deal Start Date	Deal End Date	State
Parmenion S West Deal			active

[View All](#)