

Creating a Special Deal on a Contact record

Last Modified on 18/04/2024 10:41 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:

Contacts
Recently Viewed Contacts

12 items • Sorted by Name • Filtered by Recently Viewed • Updated a few seconds ago

<input type="checkbox"/>	Name ↑	Account Name	Title	Phone	Email	Contact Owner Alias
<input type="checkbox"/>	Casey Cooper			0777777779	amy.wood@synaptic.co.uk	apaul
<input type="checkbox"/>	Casey Cooper			0122222222	test1245@gmail.com	apaul
<input type="checkbox"/>	Casey Sharon Cooper			01678954321	amy.wood@synaptic.co.uk	smith
<input type="checkbox"/>	Les West			07777777712	amy.wood@synaptic.co.uk	apaul
<input type="checkbox"/>	John Dowling					mcros
<input type="checkbox"/>	John Dowling					mcros
<input type="checkbox"/>	John Dowling			0		rchum
<input type="checkbox"/>	Steve Test			07777777773	amy.wood@synaptic.co.uk	apaul
<input type="checkbox"/>	Steve Test			+447913132801	amy.wood@synaptic.co.uk	sferg
<input type="checkbox"/>	Susanna West			07555555555	amy.wood@synaptic.co.uk	apaul
<input type="checkbox"/>	Test Client	Susanna West		07777777777	test4@test.com	apaul
<input type="checkbox"/>	Test Client1			07771111111	amy.wood@synaptic.co.uk	apaul

Navigate into the **Special Deals** tab:

Contact
Ms. Susanna West

Title Account Name Phone (2) Email Contact Owner
07555555555 amy.wood@synaptic.co.uk Amy Paulsen

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

We found no potential duplicates of this Contact.

Client Questionnaires (3)

3 items • Sorted by Default • Updated a few seconds ago

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

[View All](#)

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

Q Search

* Name
Enter Name of Special Deal...

Description
Enter Description

Cancel Save & New Save

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

Q 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

 Susanna West

Select Search Type

Platforms Off Platform Products

Q Search

 **Parmenion** X

* Name


Parmenion S West Deal


Description

Test Description

Cancel
Save & New
Save

This will load the Special Deal page.





Synaptic Pathways
Home
Paraplanner Access Centre
Contacts
Research
Portfolio Builder
Investment Pathways
Generic Funds
Configuration
Fund Lists
Knowledge Base
* Parmenion S West Deal | S...
More

Name
Parmenion S West Deal

Active Not Active

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

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
£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

Edit Add Row

Charge Tier Name
GIA Standard Switch Transaction Charge

View Provider Charges View Network Charges

Revert to Provider Charges

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

Edit Add Row

About Special Deal

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 Edit Add Row

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

Edit Add Row

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 Charges

Charge Tier Name
Platform AMC

Recent records

- Susanna West
- Test Client
- Les West
- Casey Sharon Cooper
- Casey Cooper

Recent lists

- Recently Viewed Contacts
- All Contacts

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](#)