

How do I configure the Contacts tab to only view my clients?

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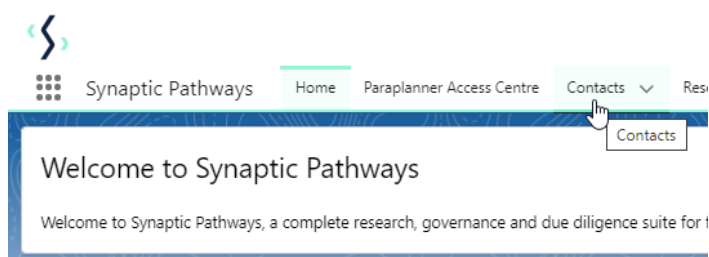
List Views can be configured within Synaptic Pathways. In this article, we will take you through cloning an existing view & creating multiple views to show the information you require.

All list views default to recently viewed records. Creating your own view allows you to set what information you would like to see.

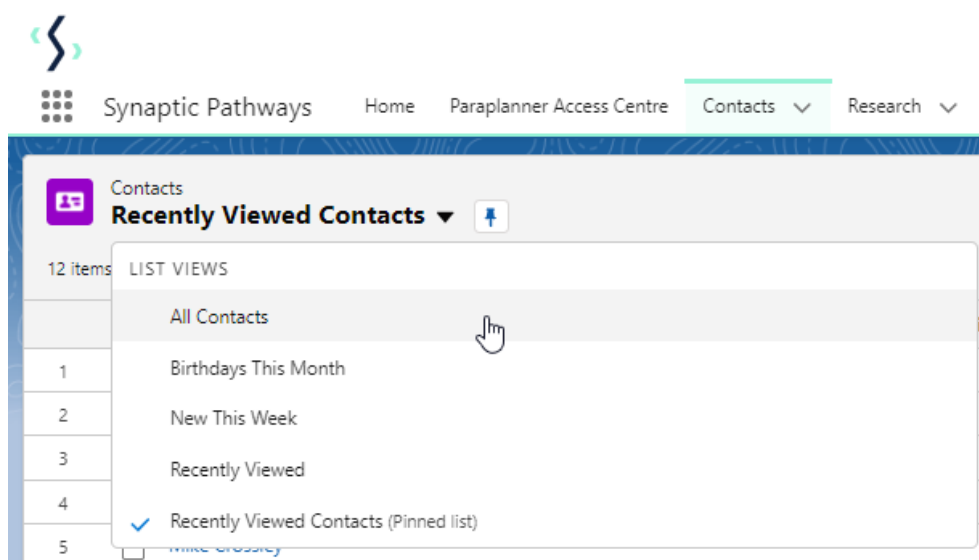
For example, If you have more than one licence in your company, you may want to set a view to show only your clients, configure the portfolio builder tab to show your portfolios or set the research tab to list all your research.

In this article, we will configure the Contacts tab.

Navigate into the Contacts tab:



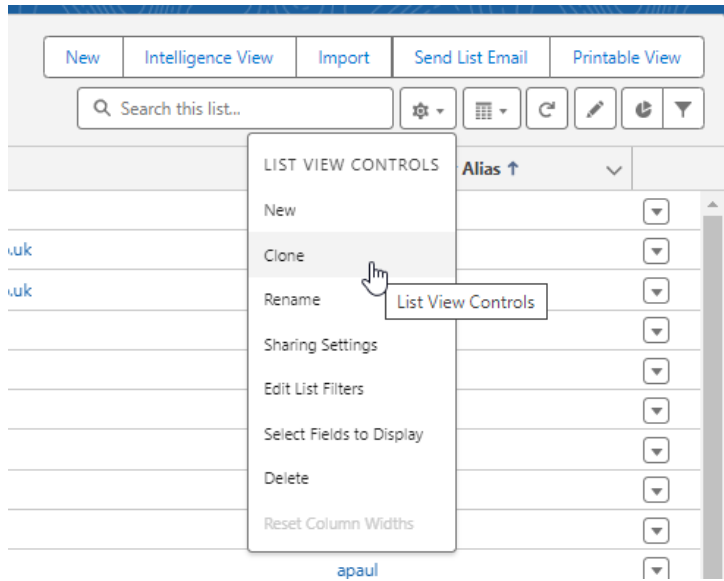
Once within the Contacts tab, click the down arrow next to **Recently Viewed Contacts** and select **All Contacts**



The **All Contacts** view can be pinned if you would prefer to view all contacts rather than recently viewed. Note: This will include all contacts within your company.

We will clone the **All Contacts** view and configure this to only pull through clients you have created.

Click on **List View Controls** and **Clone**



Keep the default **List Name** or enter you own:

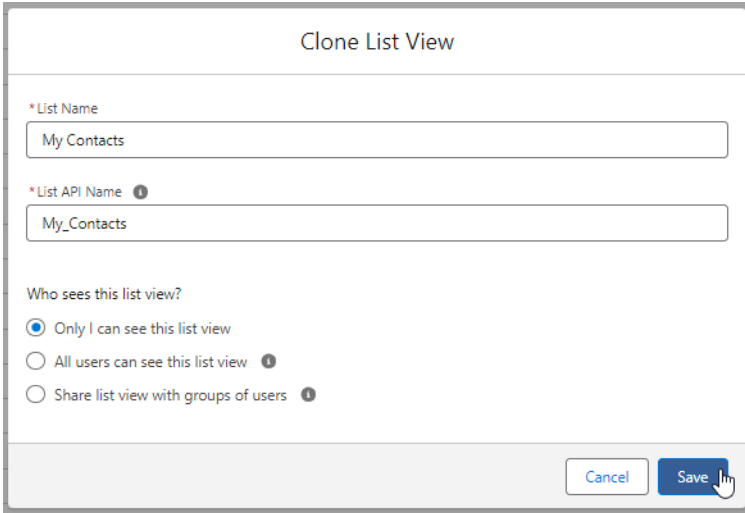
A screenshot of a 'Clone List View' dialog box. It has a title bar 'Clone List View'. Below the title bar, there are two input fields: '* List Name' with the text 'Copy of All Contacts' and '* List API Name' which is empty. Below these fields, there is a section titled 'Who sees this list view?' with three radio button options: 'Only I can see this list view' (which is selected), 'All users can see this list view', and 'Share list view with groups of users'. At the bottom right, there are 'Cancel' and 'Save' buttons.A screenshot of a 'Clone List View' dialog box. It has a title bar 'Clone List View'. Below the title bar, there are two input fields: '* List Name' with the text 'My Contacts' and '* List API Name' with the text 'My_Contacts'. Below these fields, there is a section titled 'Who sees this list view?' with three radio button options: 'Only I can see this list view' (which is selected), 'All users can see this list view', and 'Share list view with groups of users'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Set the permissions of the list. In this case, only you will be able to see this list view.

Who sees this list view?

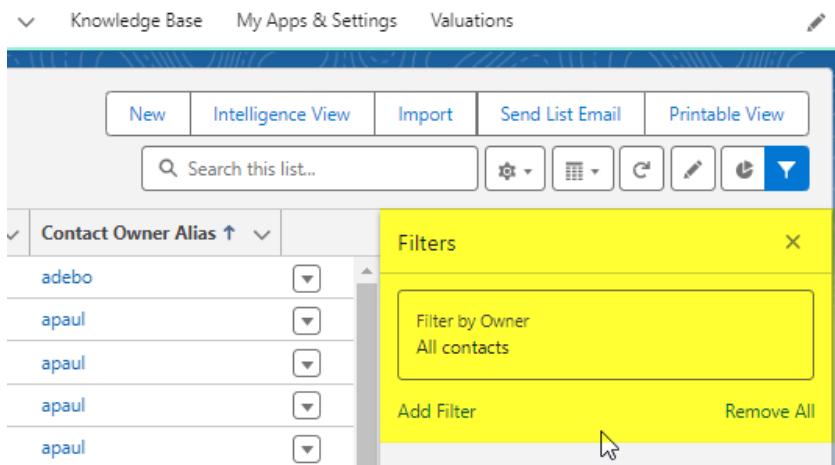
- Only I can see this list view
- All users can see this list view ⓘ
- Share list view with groups of users ⓘ

Save



The image shows a 'Clone List View' dialog box. It has a title bar 'Clone List View'. Below the title bar, there are two text input fields. The first is labeled '*List Name' and contains the text 'My Contacts'. The second is labeled '*List API Name ⓘ' and contains the text 'My_Contacts'. Below these fields, there is a section titled 'Who sees this list view?' with three radio button options: 'Only I can see this list view' (which is selected), 'All users can see this list view ⓘ', and 'Share list view with groups of users ⓘ'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save'.

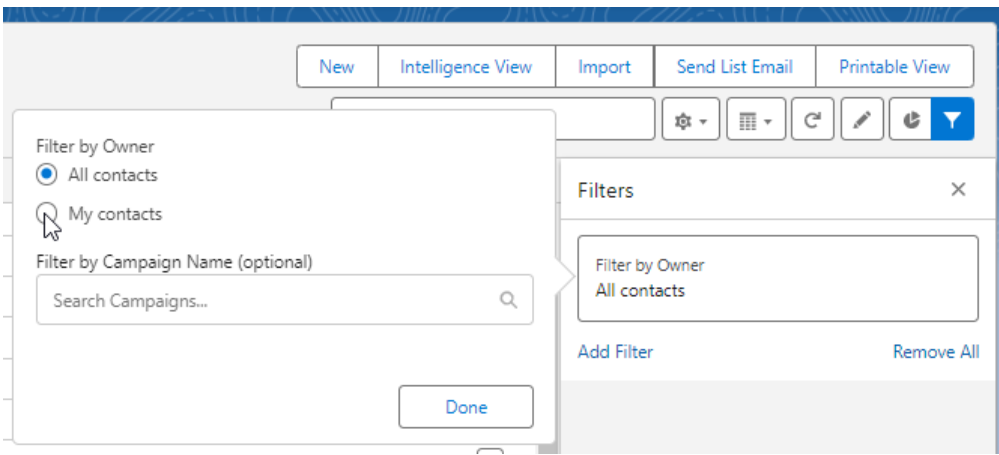
When the tab loads, a filter screen will open on the right side of the screen:



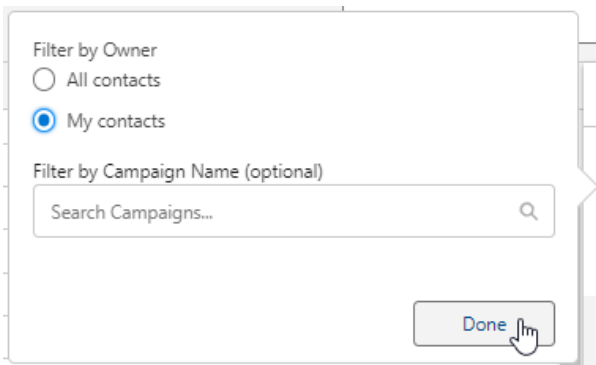
The image shows a screenshot of a software interface. At the top, there are navigation tabs: 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. Below the tabs, there is a toolbar with buttons for 'New', 'Intelligence View', 'Import', 'Send List Email', and 'Printable View'. A search bar with the placeholder text 'Search this list...' is also present. The main area shows a list of contacts with the column header 'Contact Owner Alias ↑'. The list contains five entries, all with the value 'apaul'. A yellow 'Filters' overlay is open on the right side of the screen. It has a title 'Filters' and a close button 'x'. Inside the overlay, there is a section 'Filter by Owner' with the text 'All contacts'. At the bottom of the overlay, there are two buttons: 'Add Filter' and 'Remove All'.

These filters allow you to set a number of options. For example, date ranges and fields that must contain or equal a value.

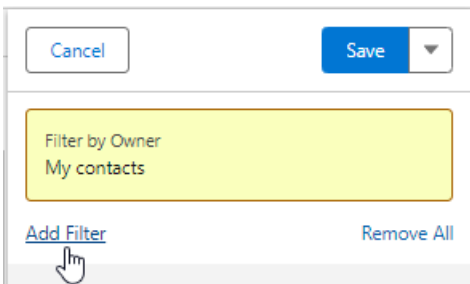
We will select **My Contacts**



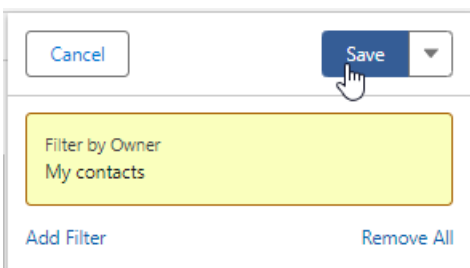
Done



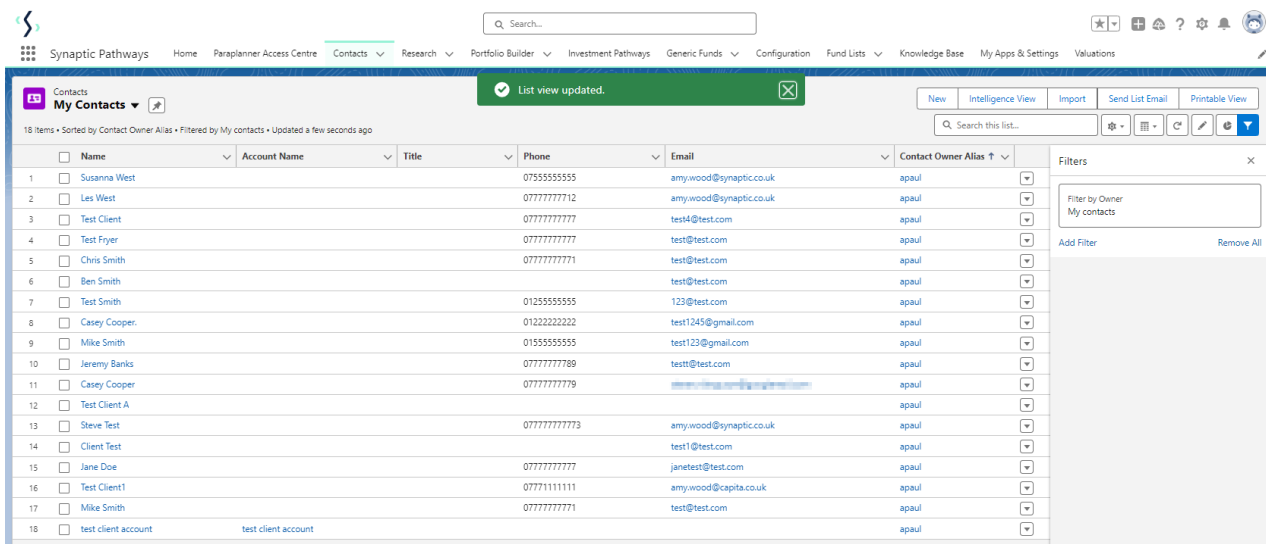
Add additional options through **Add Filter**



Click **Save**

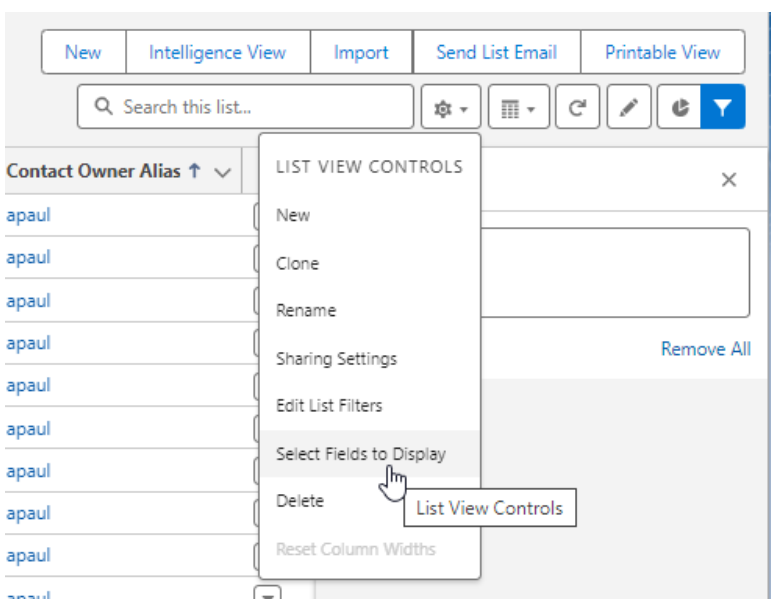


The view will now return all research completed by you.

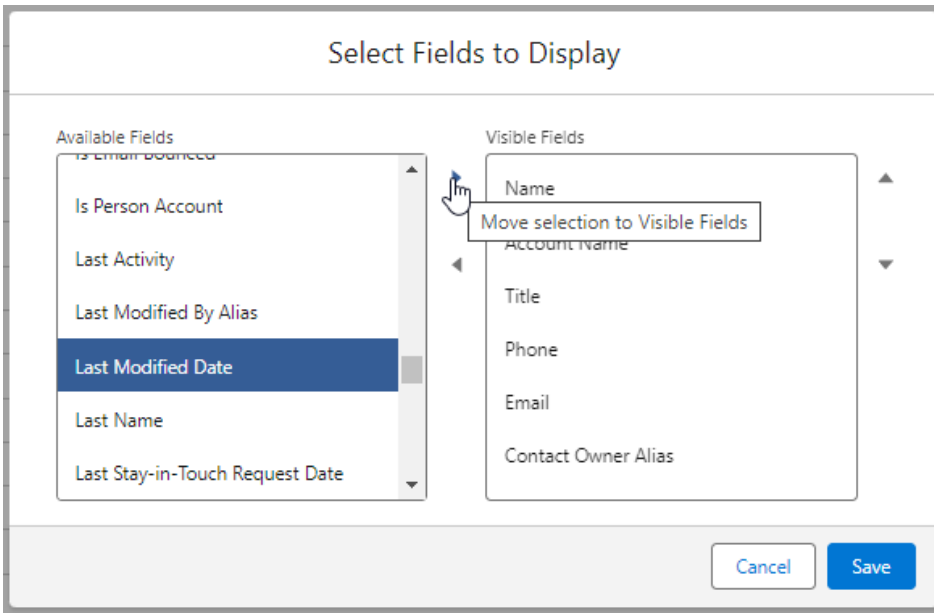


You are also able to include additional columns to the view through the **List View Controls** dropdown.

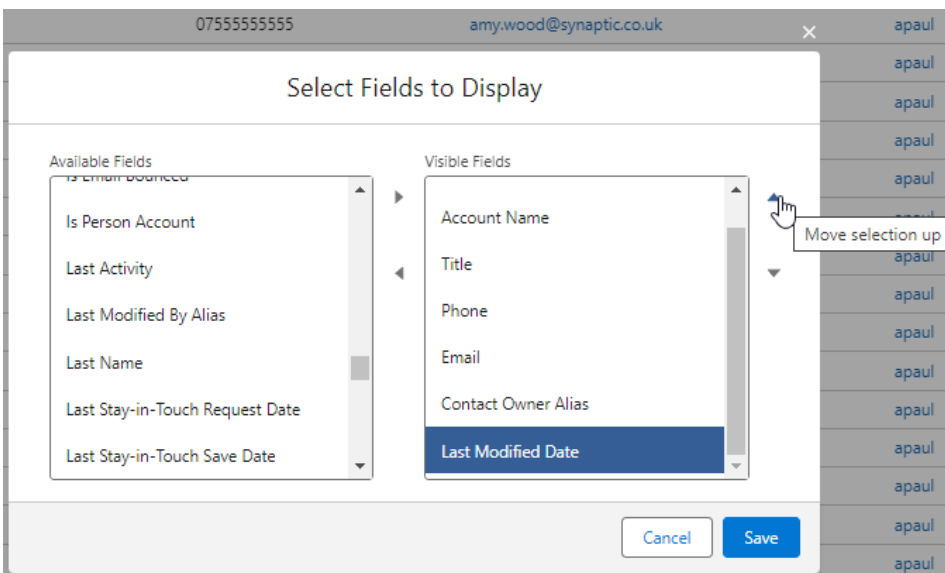
Click **Select Fields to Display**



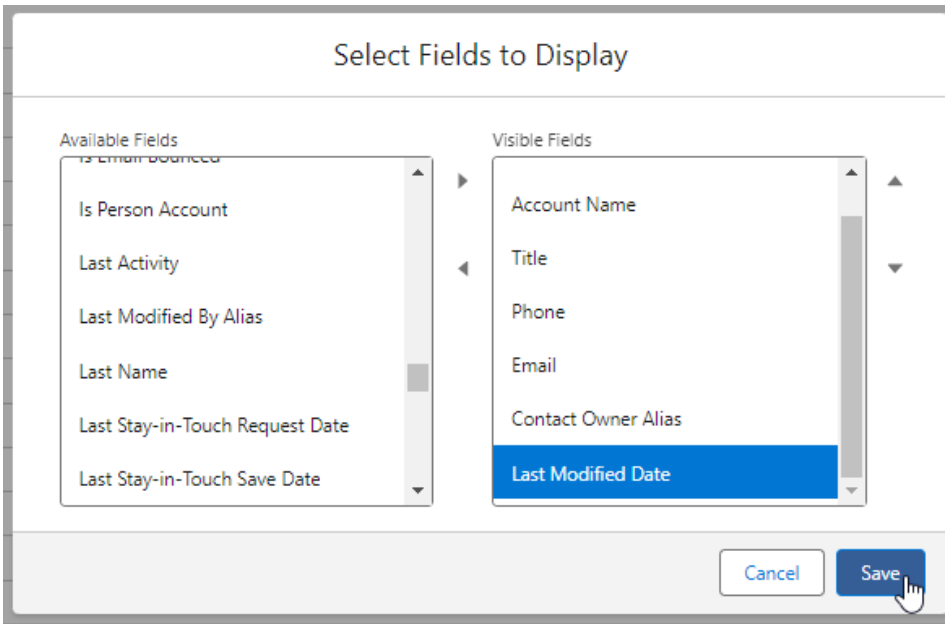
Scroll through the list of **Available fields**. Select an option and use the arrow to move the field over to **Visible Fields**



The field will be added to the bottom of the list. Select the field and use the arrows to move the selection up or down the list. This reflects the order of the list view.

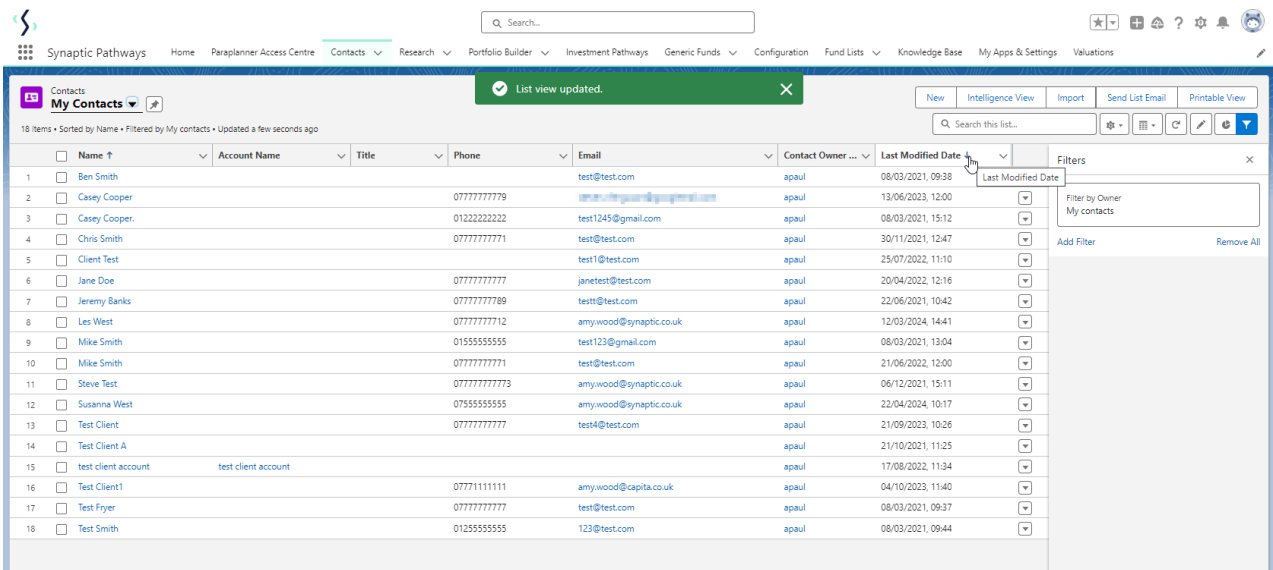


Save



The view has now been updated.

Each column can be sorted:



Multiple views can be created or cloned through the **List View Controls** area.

View all lists through the dropdown:



Contacts

My Contacts ▾

18 items

LIST VIEWS

- All Contacts
- 1 Birthdays This Month
- 2 My Contacts
- 3 New This Week
- 4 Recently Viewed
- 5
- 6 Recently Viewed Contacts (Pinned list)