# 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

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*List API Name 🚺	
Who sees this list view?	
<ul> <li>Only I can see this list view</li> </ul>	
○ All users can see this list view <b>①</b>	
Share list view with groups of users	,
	Cancel Save

Clone List View	
* List Name	
My Contacts	
*List API Name 🕕	
My_Contacts	
Who sees this list view?	
Only I can see this list view	
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○ Share list view with groups of users <b>0</b>	
	Cancel

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

### Save

<ul> <li>*List Name</li> <li>My Contacts</li> <li>*List API Name  <ul> <li>My_Contacts</li> </ul> </li> <li>Who sees this list view?</li> <li>Only I can see this list view</li> <li>All users can see this list view</li> <li>Share list view with groups of users</li> </ul>		Clone List View
List API Name ① My_Contacts Who sees this list view? ③ Only I can see this list view ④ All users can see this list view	*List Name	
My_Contacts Who sees this list view? Only I can see this list view All users can see this list view	My Contacts	
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Only I can see this list view     All users can see this list view	My_Contacts	
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Cancel		Cancel Save In

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

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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

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### Done

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# Add additional options through Add Filter

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Filter by Owner My contacts	
Add Filter	Remove All
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## Click Save

Cancel	Save 🗸
Filter by Owner My contacts	
Add Filter	Remove All

The view will now return all research completed by you.

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	Sorted by Contact Owner Alias     Name		contacts • Updated a few seco		Title	~	Phone	~	Email	✓ Conta	ct Owner Alias ↑ ∨	Filters	
	Susanna West						0755555555		amy.wood@synaptic.co.uk	apaul	T	Filters	
	Les West						0777777712		amy.wood@synaptic.co.uk	apaul		Filter by Owner	
	Test Client						07777777777		test4@test.com	apaul		My contacts	
	Test Fryer						07777777777		test@test.com	apaul		Add Filter	Rem
	Chris Smith						0777777771		test@test.com	apaul			
	Ben Smith								test@test.com	apaul			
	Test Smith						0125555555		123@test.com	apaul			
	Casey Cooper.						0122222222		test1245@gmail.com	apaul			
	Mike Smith						0155555555		test123@gmail.com	apaul			
	Jeremy Banks						0777777789		testt@test.com	apaul			
	Casey Cooper						0777777779		the strategy of the spin strategy of the	apaul			
	Test Client A									apaul			
	Steve Test						07777777773		amy.wood@synaptic.co.uk	apaul			
	Client Test								test1@test.com	apaul			
	Jane Doe						07777777777		janetest@test.com	apaul			
	Test Client1						07771111111		amy.wood@capita.co.uk	apaul			
	Mike Smith						07777777771		test@test.com	apaul			

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

## Click Select Fields to Display

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

Available Fields	Visible Fields
Is Person Account	Name Move selection to Visible Fields
Last Activity	Account trame
Last Modified By Alias	Title
Last Modified Date	Phone
Last Name	Email
Last Stay-in-Touch Request Date	Contact Owner Alias

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.

0755555555		amy.wood@synaptic	.co.uk		apaul
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Available Fields		Visible Fields			apaul
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Save

Sele	ct Fiel	ds	to Display		
Available Fields			Visible Fields		
Is Person Account			Account Name	^	•
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Last Modified By Alias			Phone		
Last Name			Email		
Last Stay-in-Touch Request Date			Contact Owner Alias		
Last Stay-in-Touch Save Date	-		Last Modified Date	Ţ	
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The view has now been updated.

### Each column can be sorted:

S	ynaptic Pathways	Home	Paraplanner Access Centre	Cont	acts 🗸 Research	<ul> <li>Portfolio Builder</li> </ul>	V Inv	estment Pathways 🛛 Generic Funds 🗸	Config	uration Fund Lists	✓ Knowledge Bas	e My Apps & Setting	ıs Valuations	
-	iontacts My Contacts 🛡 💉	Mv contacts	Updated a few seconds ago			🕑 List '	view upo	lated.		×	New Q S	Intelligence View	Import Send List Er	
	Name ↑		Account Name	~	Title ~	Phone	~	Email	~	Contact Owner 🗸	<ul> <li>Last Modified Date</li> </ul>	e 4 <sub>m</sub> ~	Filters	
	Ben Smith							test@test.com		apaul	08/03/2021, 09:38	Last Modified Da	te	
	Casey Cooper					0777777779		en en de participación de la companya de la company		apaul	13/06/2023, 12:00		Filter by Owner	
	Casey Cooper.					0122222222		test1245@gmail.com		apaul	08/03/2021, 15:12		My contacts	
	Chris Smith					0777777771		test@test.com		apaul	30/11/2021, 12:47		Add Filter	Remo
	Client Test							test1@test.com		apaul	25/07/2022, 11:10			
	Jane Doe					07777777777		janetest@test.com		apaul	20/04/2022, 12:16			
	Jeremy Banks					0777777789		testt@test.com		apaul	22/06/2021, 10:42			
	Les West					0777777712		amy.wood@synaptic.co.uk		apaul	12/03/2024, 14:41			
	Mike Smith					0155555555		test123@gmail.com		apaul	08/03/2021, 13:04			
	Mike Smith					0777777771		test@test.com		apaul	21/06/2022, 12:00			
	Steve Test					07777777773		amy.wood@synaptic.co.uk		apaul	06/12/2021, 15:11			
	Susanna West					0755555555		amy.wood@synaptic.co.uk		apaul	22/04/2024, 10:17			
	Test Client					07777777777		test4@test.com		apaul	21/09/2023, 10:26			
	Test Client A									apaul	21/10/2021, 11:25			
	test client account		test client account							apaul	17/08/2022, 11:34			
	Test Client1					07771111111		amy.wood@capita.co.uk		apaul	04/10/2023, 11:40			
	Test Fryer					07777777777		test@test.com		apaul	08/03/2021, 09:37			
	Test Smith					0125555555		123@test.com		apaul	08/03/2021.09:44			

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

View all lists through the dropdown:

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	All Contacts	ł
1	Birthdays This Month	
2	/ My Contacts	7
3	New This Week	
4	Recently Viewed	Ī
5		
6	Recently Viewed Contacts (Pinned list)	÷