

# How to view previously completed research / reports

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To view the reports generated from completed research, click **Contacts** from the left hand menu.

Contacts

Click on the name of the contact in the **Contacts** panel, any research done on the client will then show in the **Activities** panel:

The screenshot shows the Synaptic Software interface. On the left, there is a sidebar with a 'Contacts' menu item. The main area is divided into three sections: 'Contacts', 'Personal', and 'Activities'. The 'Contacts' panel shows a list of 4 contacts, with 'Client TestA' selected. The 'Personal' panel displays details for 'Client TestA', including name, address, date of birth, gender, home, office, mobile, email, and service level. The 'Activities' panel shows a list of 5 activities, with 'Research' (17 Dec 2015 10:47am) selected. The 'Research' activity is marked with a green checkmark, indicating it is completed. The 'Activities' panel also shows a list of 5 activities, with 'Research' (17 Dec 2015 10:47am) selected. The 'Research' activity is marked with a green checkmark, indicating it is completed. The 'Activities' panel also shows a list of 5 activities, with 'Research' (17 Dec 2015 10:47am) selected. The 'Research' activity is marked with a green checkmark, indicating it is completed.

🕒 Marks incomplete research (see related article on how to resume research).

✓ Marks completed research.

Click on the completed research you wish to view the report for, this will load the research information to the right of the **Activities** window, named **Activity Detail**:

The screenshot shows the 'Activity Detail' window. It displays the following information:

- type: Comparison
- created: 6 Oct 2011 4:11pm
- created by: Jason De Boos
- last updated: 6 Oct 2011 4:13pm

The name field contains 'Comparison 1' and has an 'Update' button next to it. The notes field contains the following text:

Investment term: 10 years  
No switches  
- £10000 in GIA  
Feature selection:  
General investment account

This displays the information about the research conducted (including the title of the research, time and date done), using the scroll bar on the right hand side of this pane, scroll to the bottom (if your resolution is high enough to display all of the information without a scroll bar, please ignore this step).

The screenshot shows a software interface with two main panes. The left pane, titled 'Activities', contains a list of items: 'Research' (17 Dec 2015 10:47am), 'Research' (17 Dec 2015 3:32pm), 'Copy of ResearchAUG' (7 Aug 2015 9:27am), 'ResearchAUG' (7 Aug 2015 9:16am), and 'ResearchTEST' (7 Aug 2015 1:50pm). The right pane, titled 'Activity Detail', shows details for the selected 'Research' activity. It includes a 'name' field with the value 'Research', a 'notes' field with the text 'Investment term: 10 years 0 months', 'Monthly switches of 15% p.a.', and '4 trades per switch (buys + sells)'. Below the notes are two lists: '- E100000 in GIA', '- E50000 in SB99', '- E50000 in PP', and 'Feature selection: General investment account, Retirement, Self Invested Personal Pension, Personal Pension, Unit Trusts/OEICs'. At the bottom of the right pane, under the heading 'documents', there is a PDF icon and the text 'Synaptic Illustrator report - 17.12.15 10.47.41.pdf'. In the top right corner of the right pane, there are fields for 'type', 'created by', and 'last updated', all showing '17 Dec 2015 10:37am', and an 'Update' button.

You can now see the report under the heading of **documents**. Click on the icon or name of the report, the report will then open in a new window.