

# How do I retrieve research?

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Once research has been started on Synaptic it will be automatically saved if you need to leave the software.

To retrieve the research, from the **Home Page**, navigate to the **Recent** tab:



Here you will find the last twenty pieces of research that has been started. To go back to a piece of research, click on its name (on the left hand side of this screen shot).

This will take you back to the beginning of the research.

## Older Research

If your research no longer appears in the list of the last twenty pieces of research, you can use the following to search for it:



Here you can see:

**Find by client name:**

**Find by title:**

Simply type the client surname or the name of the piece of research into the appropriate field and click **Find**.

In the following screen shot, the client's surname has been added and find has been

clicked, a list of research for clients with the surname **Smith** are being shown:

Research	Client	Last viewed	Actions
<input type="checkbox"/> Linked funds on Aviva Life & Pensions UK Limited Personal Pension	David Smith	31/08/2012	Copy
<input type="checkbox"/> Personal Pension (Fully Insured)	David Smith	17/08/2012	Copy
<input type="checkbox"/> Linked funds on Aviva Life & Pensions UK Limited Personal Pension	David Smith	17/08/2012	Copy
<input type="checkbox"/> Individual Savings Accounts: Stocks and Shares	David Smith	17/08/2012	Copy
<input type="checkbox"/> Investment Bond: Unit Linked	David Smith	03/08/2012	Copy
<input type="checkbox"/> Fund data: Unit trusts/OEICs	David Smith	20/07/2012	Copy
<input type="checkbox"/> Manual fund list (conversion)	David Smith	08/06/2012	Copy
<input type="checkbox"/> Fund data: Manual fund list	David Smith	25/05/2012	Copy
<input type="checkbox"/> David Smith: Existing portfolio	David Smith	25/05/2012	Copy
<input type="checkbox"/> Linked funds on Aviva Life & Pensions UK Limited Personal Pension	David Smith	25/05/2012	Copy
<input type="checkbox"/> Individual Savings Accounts: Stocks and Shares	David Smith	23/05/2012	Copy
<input type="checkbox"/> D Smith existing portfolio	David Smith	18/05/2012	Copy
<input type="checkbox"/> Linked funds on Aviva Life & Pensions UK Limited Personal Pension	David Smith	18/05/2012	Copy

To go back into one of these, simply click on the name of the piece of research.

If the research has a pink background and a red date, this indicates that since this piece of research has been started the system has been updated. This means that your piece of research could be out of date.

A message appears if you click on a piece of research with a pink background:



Work through the research to ensure that any contract you were looking to recommend is still relevant, as there may have been changes which means that it no longer is.

### Alternative way of finding client focused research

You can also use the **Client** tab to find client focused research:

Find: **Contract** **Company** **Fund** **Client**

Name:

(Enter the client surname to search for)

Enter the client's name and click **Go**. Select the client from the list and the research will be listed under **List Research**:

Find: [Contract](#) [Company](#) [Fund](#) [Client](#)

Name:

For information on coloured backgrounds and icons [click here](#).

Individual Savings Accounts: Stocks and Shares  
Today, David Smith

Linked funds on Aviva Life & Pensions UK Limited  
Personal Pension  
31/08/2012, David Smith

Personal Pension (Fully Insured)  
17/08/2012, David Smith

Linked funds on Aviva Life & Pensions UK Limited  
Personal Pension  
17/08/2012, David Smith

Investment Bond: Unit Linked  
03/08/2012, David Smith

Fund data: Unit trusts/OEICs  
20/07/2012, David Smith

Manual fund list (conversion)  
08/06/2012, David Smith

Click on the name of the research to go back onto it.