How do I create Multiple Reports on Synaptic Research?

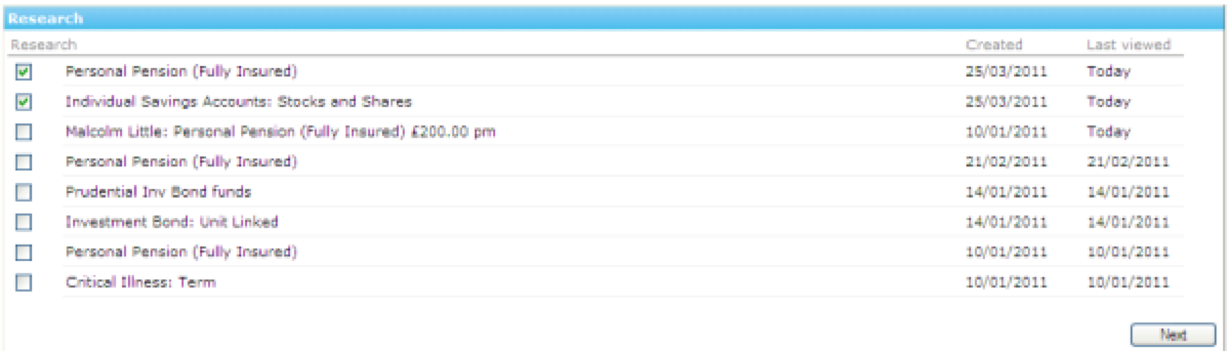
Last Modified on 02/06/2017 12:51 pm BST

This article explains how to produce a Suitability Report for multiple pieces of research.

To be able to use this part of Synaptic, the Multiple Report licence on Synaptic is required. If you do not have this please contact our Customer services team, they will enable this for you.

When the second/third piece of research for a client has been completed, the multiple suitability report can be accessed from the **Reports** button on the Menu Bar.   There will be a **Multiple Reports - Client Name** which needs to be selected:

Once this has been selected, choose the pieces of research for which this suitability report needs to be written:


Research

	Research	Created	Last viewed
☑	Personal Pension (Fully Insured)	25/03/2011	Today
☑	Individual Savings Accounts: Stocks and Shares	25/03/2011	Today
☐	Malcolm Little: Personal Pension (Fully Insured) £200.00 pm	10/01/2011	Today
☐	Personal Pension (Fully Insured)	21/02/2011	21/02/2011
☐	Prudential Inv Bond funds	14/01/2011	14/01/2011
☐	Investment Bond: Unit Linked	14/01/2011	14/01/2011
☐	Personal Pension (Fully Insured)	10/01/2011	10/01/2011
☐	Critical Illness: Term	10/01/2011	10/01/2011

Next

Once done, click **Next.** Now select the sections that need to added into the letter. Use the **Add button** at the end of each section to add the relevant sections into the multiple suitability report: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Choose templates for multiple report

Multiple Reports | Back to research selection | Help

Templates

Product	Basis	Template name	Research	Last viewed	Action
General	All	Introduction - Multi Sale			Add
Personal Pension (Fully Insured)	Personal Pension (Fully Insured)	Definitions - PPP	Personal Pension (Fully Insured)	25/03/2011	Add
Personal Pension (Fully Insured)	Personal Pension (Fully Insured)	Research - Personal Pension	Personal Pension (Fully Insured)	25/03/2011	Add
Individual Savings Accounts	Stocks and Shares	Definitions - ISA	Individual Savings Accounts: Stocks and Shares	25/03/2011	Add
Individual Savings Accounts	Stocks and Shares	Research - ISA	Individual Savings Accounts: Stocks and Shares	25/03/2011	Add

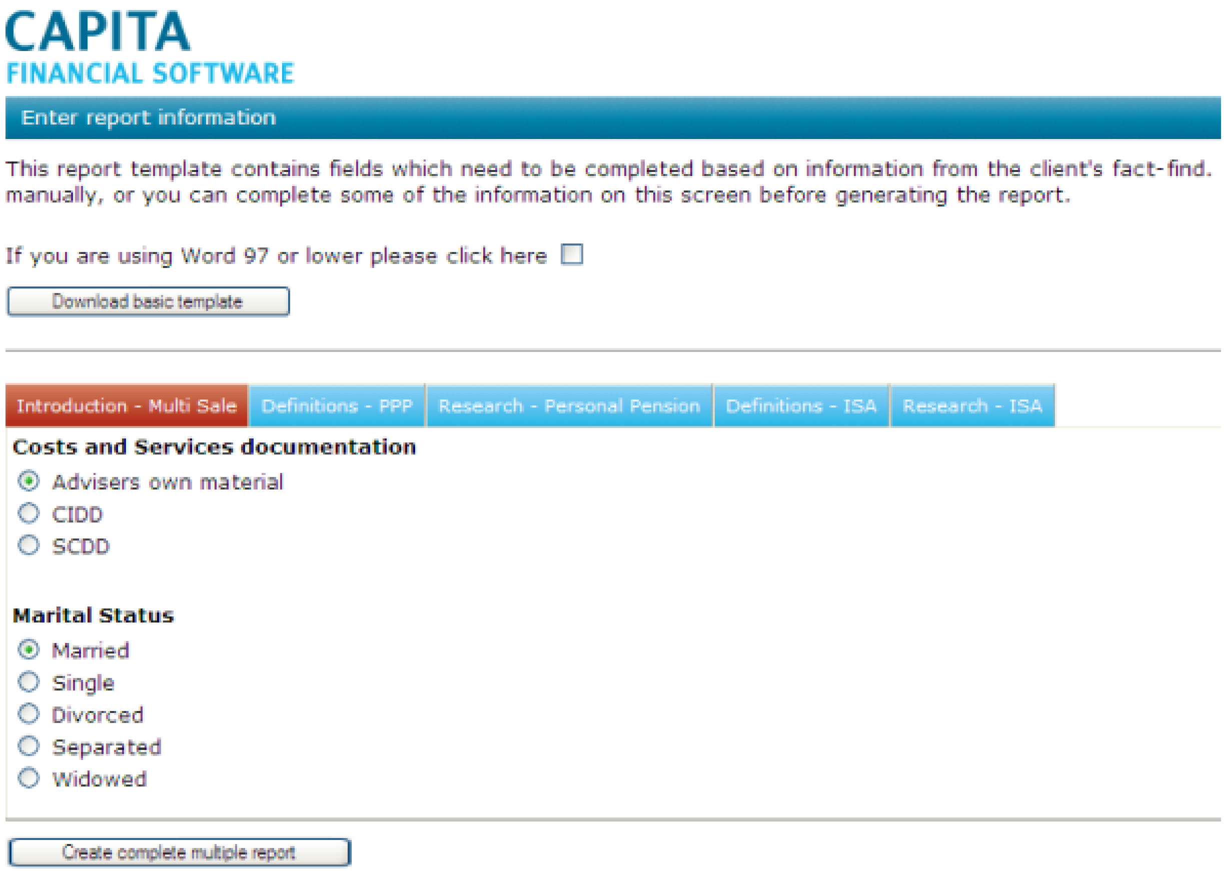
Multiple Report

Product	Template name	Research	Action
General	Introduction - Multi Sale		Remove
Personal Pension (Fully Insured)	Definitions - PPP	Personal Pension (Fully Insured)	Remove
Personal Pension (Fully Insured)	Research - Personal Pension	Personal Pension (Fully Insured)	Remove
Individual Savings Accounts	Definitions - ISA	Individual Savings Accounts: Stocks and Shares	Remove
Individual Savings Accounts	Research - ISA	Individual Savings Accounts: Stocks and Shares	Remove

Generate Report

Once all the relevant sections have been added into the Suitability Letter, use the **Generate Report** button to generate the letter.

Work through the tabs answering for questions that have been added:



Once completed, click **Create complete multiple report.**

Check the suitability report now for red text to check the information or to input the required information. Once completed, select all the text and change the colour to black.

As this letter is produced in Word, save the letter to your PC or Server as appropriate. If this is not done, all your amendments will be lost.