

How do I create Multiple Reports on Synaptic Research?

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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:

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Choose a report template | Fund picker | Back to ranking

1. Choose the contract you are recommending (if any)

- (No recommendation)
- 1 Scottish Widows The Retirement Account - Nil Commission
- 2 Prudential Intermediary Division Pru Flexible Retirement Plan
- 3= Scottish Widows The Retirement Account - Flexible Commission
- 3= Scottish Widows The Retirement Account - Scaled Commission
- 5 Scottish Life (Royal London) Pension Portfolio (Financial Advisers Fee)
- 6= Legal & General L&G (available on Cofunds) Portfolio Plus Pension
- 6= Legal & General Portfolio Plus Pension

2. Click on a report template

Quick reports (open in your browser)
Standard research report
Factsheet for the selected contract

Report Manager suitability reports (download as RTF)
Research Report
Standard Report - Personal Pension
Multiple Reports - Malcolm Little

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

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

[Next](#)

Once done, click **Next**. Now select the sections that need to be 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

[+ Back to research selection](#) | [help](#)

Multiple Reports					
Templates					
Product	Base	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:

Enter report information

This report template contains fields which need to be completed based on information from the client's fact-find. manually, or you can complete some of the information on this screen before generating the report.

If you are using Word 97 or lower please click here

Download basic template

Introduction - Multi Sale

Definitions - PPP

Research - Personal Pension

Definitions - ISA

Research - ISA

Costs and Services documentation

- Advisers own material
- CIDD
- SCDD

Marital Status

- Married
- Single
- Divorced
- Separated
- Widowed

Create complete multiple report

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.