How do I send research in Synaptic Research?

Last Modified on 31/03/2020 3:29 pm BST

This article explains how to send research to other named users on your licence.

It is possible to send research between named users on a licence. To do this find the piece of research to be sent to a named user. Use the **Send button** on the Menu Bar:

	(0 contracts out of 34 (29%)	Option		
Company		Minimum age at entry (NB)	PPI cover ceases at age NB	
Friends Provident	The Personal Range - Individual Pe	None	N/A	
Legal & General	L&G (available on Cofunds) Portfol	18	N/A	
Legal & General	Portfolio Plus Pension	18	N/A	
Prudential Intermedia	Pru Flexible Retirement Plan	17	N/A	
Scottish Life (Royal L)	Pension Portfolio	None	65	
Scottish Life (Royal D	Pension Portfolio (Financial Adviser	None	65	
Scottish Widows	Individual Personal Pension Plan	None	60	
Scottish Widows	The Retirement Account - Flexible	None	60	
Scottish Widows	The Retirement Account + Nil Comi	None	60	
Scottish Widows	The Retirement Account - Scaled C	None	60	

Now select who this is to be sent to and confirm what you want to happen:

- Remove client information from the research
- Delete your copy of the research

Make any notes as appropriate and when done, click Send:



A pop up box will appear, click **OK**:

Window	s InternetExplorer 🛛 🔀
⚠	This research has been sent.
-	ОК

Your colleague will receive a copy of this research the next time they log into Synaptic Research.

A message will appear on the **Menu Bar** on the front screen to confirm that a piece of research has been received:

Home	Pen	sion savings	Pension	n income	Life	Health	Investment	Finance	Offshore	[Recent]
N	ews	Industry	A&D	Contact	т	raining	Guides			

The **Recent** tab will show the piece of research received:

🖨 You have new research						User list File check P		
Home Pension saving	s Pension income	Life Health	Investment	Finance	Offshore	[Recent]		
nd by client name:	[Find] F	nd by title:	Find	Sho	w recent			
For information on colo Research	ured backgrounds ar	nd icons click he	ine.			Client	Last viewed	Actions
🔲 🙆 Personal Pension (Fully Insured)					term limbe	Today	Сору	
E Service Personal Pension (Fully Insured) £200.00 pm					Participa Links	Today	Copy	
Personal Pension (Fully Insured)					Warner Contra	Today	Copy	
🔲 🖆 Personal Pension (Fully Insured)					Chiefe Street,	Today	Сору	
Euclidata: Pension funds						15/03/2011	Com	

The first item in this list is the piece of research which has been sent.