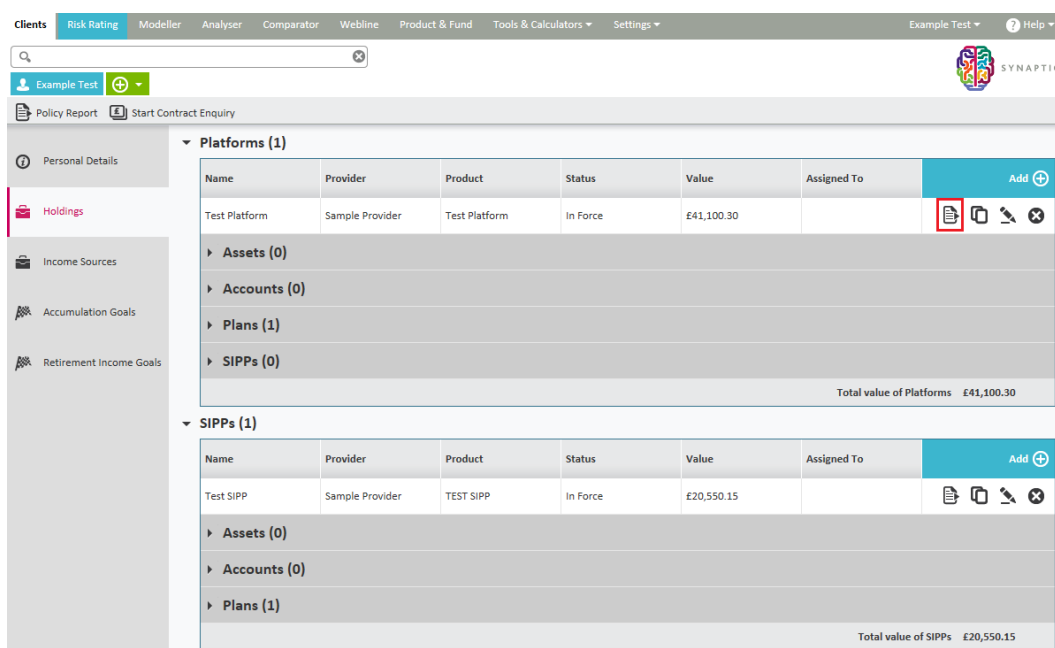


How do I create a policy report?

Last Modified on 23/11/2017 3:27 pm GMT

Once you have finished entering holdings it is possible to access the data in report form which can be used to give to the client. You can produce an individual report for any holding by clicking on the report icon in the holdings screen as shown below:



The screenshot displays the SYNAPTIC software interface. At the top, there is a navigation bar with tabs for 'Clients', 'Risk Rating', 'Modeller', 'Analysar', 'Comparator', 'Webline', 'Product & Fund', 'Tools & Calculators', and 'Settings'. A search bar and a user profile icon are also visible. Below the navigation bar, there is a sidebar with a 'Policy Report' button highlighted. The main content area shows a table of holdings under the heading 'Platforms (1)'. The table has columns for Name, Provider, Product, Status, Value, and Assigned To. A red box highlights the report icon in the 'Test Platform' row. Below the table, there are sections for 'Assets (0)', 'Accounts (0)', 'Plans (1)', and 'SIPPs (0)'. The total value of platforms is shown as £41,100.30. Below this, there is another table for 'SIPPs (1)' with columns for Name, Provider, Product, Status, Value, and Assigned To. The 'Test SIPP' row shows a value of £20,550.15. Below this table, there are sections for 'Assets (0)', 'Accounts (0)', and 'Plans (1)'. The total value of SIPPs is shown as £20,550.15.

Name	Provider	Product	Status	Value	Assigned To	Add
Test Platform	Sample Provider	Test Platform	In Force	£41,100.30		Report Icon

Assets (0)
Accounts (0)
Plans (1)
SIPPs (0)

Total value of Platforms £41,100.30

Name	Provider	Product	Status	Value	Assigned To	Add
Test SIPP	Sample Provider	TEST SIPP	In Force	£20,550.15		Report Icon

Assets (0)
Accounts (0)
Plans (1)

Total value of SIPPs £20,550.15

Alternatively you can produce a combined policy report on any number of the holdings you have entered. The report will contain an overview of all the holdings selected at the start of the report and then the data for the individual selected holdings after. This report is designed to give the client a holistic view of their holdings.

To produce this report click on the **Policy Report** button above the tabs on the left of the screen.

Clients Risk Rating Modeller Analyser Comparator Webline Product & Fund Tools & Calculators Settings Example Test Help

Example Test

Policy Report Start Contract Enquiry

Personal Details

Holdings

Income Sources

Accumulation Goals

Retirement Income Goals

Platforms (1)

Name	Provider	Product	Status	Value	Assigned To	Add
Test Platform	Sample Provider	Test Platform	In Force	£41,100.30		

Assets (0)

Accounts (0)

Plans (1)

SIPPs (0)

Total value of Platforms £41,100.30

SIPPs (1)

Name	Provider	Product	Status	Value	Assigned To	Add
Test SIPP	Sample Provider	TEST SIPP	In Force	£20,550.15		

Assets (0)

Accounts (0)

Plans (1)

Total value of SIPPs £20,550.15

You will then need to select which holdings you would like included in the report

Holdings Report

Select the holdings you would like to include in the report.

Name	Type	Details	Value
<input type="checkbox"/> Test Bank Account	Account	Bank - Savings Account	£10,000.00
<input type="checkbox"/> Cyprus Holiday Home	Asset		£30,000.00
<input type="checkbox"/> Test Plan	Plan	Sample Provider - Sample Test Plan	£40,320.01
<input type="checkbox"/> Test SIPP	SIPP	Sample Provider - TEST SIPP	£20,550.15
<input type="checkbox"/> TEST ISA	Plan	-	£20,550.15
<input type="checkbox"/> Test Platform	Platform	Sample Provider - Test Platform	£41,100.30
<input type="checkbox"/> Test Plan	Plan	Sample Provider - Test Plan	£41,100.30

Create Report Cancel