## Saving reports to intelliflo office

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## Saving reports to intelliflo office

Once you have completed your research in Synaptic Pathways, you will have the option to save the report back to your intelliflo office client record.

For example when you complete an Attitude to Risk Questionnaire you will have the option to **Download Report** or send the report back to the client record in intelliflo by clicking **Send to intelliflo**.

E Attitude To Risk Questionnaire Test Tester ATRQ		Delete
Contact Test Tester		
		See CHIRANIGN (AND SEC) SEE CHIRANIGN (AND SEC
E Details Z Risk Questionnaire		
		গীয় Send to Intellifio
Prepared For	Date 6th January 2023	
Send to Intelliflo	⊎ Download Report	

Once you click on **Send to intelliflo** the details will be greyed out for a few seconds then you will receive a confirmation message once this report has been successfully saved back to intelliflo



From intelliflo office, go to the Documents section on the Client



You can see the document has been saved against the client record with the date/time that this was completed.

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	ATRQ Report	1.0	Draft		06/01/2023 09:4	3:25		No		Profile	iew Create Pdf	
With	With selection (Delete) (Add To Binder) (Unk to Plan) (Share with client) (Unshare from client)											
							Results per	page 10 V R	ows 1 to 1 of 1	« First Prev	1 of 1	Next> Last>

You can then view this report, share with the client or download and store locally.