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**.

Attitude To Risk Questionnaire Test Tester ATRQ		Delete
Contact Test Tester		
		~
E Details 🖉 Risk Questionnaire		
		영 Send to Intellifio 날, Download Report
Prepared For Test Tester	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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ocum	ents											
	Title	Version	Status	Linked To	Last Updat	Category	Subcategory	Shared?	Binder			
	Filter By	Filter By	Filter By	Filter By	Filter By	Select	Select	•	Filter By		Fi	ter Res
. 🤇	ATRQ Report	1.0	Draft		06/01/2023 09:43	:25		No		Profile View	Create Pdf	

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