Set Synaptic as quote provider

Last Modified on 04/04/2023 3:01 pm BST

To set Synaptic as the default quote provider in CIExpert, **select** the assessment you wish to work on



Click on the Synaptic button

New Assessment		
Let's get started, this won't take long Step 1: Client Details		
How would you like to handle quotes for this assessment?	Manual 🎔	Iress ♡
	SolutionBuilder ♡	Synaptic 🛇

Click Set as Favourite



Synaptic will now be set as the default quote provider indicated by the heart icon ♥

How would you like to handle quotes for this assessment?	Manual	2	Iress ♡
	SolutionBuilder	2	Synaptic 🖤
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CIExpert discounted rate

For existing Synaptic users new to CIExpert, a discount is available when signing up to the service via the CIExpert/Synaptic page. Click on Try it for free in CIExpert to access a free trial.

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