

How do I navigate the software?

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Synaptic Research behaves like a normal web site – you can use your browsers **Back**, **Forwards**, and **Refresh** buttons in the usual way.



All pages have the same general layout:

- There is an icon in the top left corner (indicated by 1 in the screenshot) which always acts as a link back to the home page.
- There is a page title and sub-title.
- There is a menu bar of the main actions which can be carried out on the page (indicated by 2 in the screenshot).

The menu bar shows a forward arrow for links which are the possible “next steps” in a research process (and a back arrow for going back one or more stages).

Tooltips

Any link, or button, or field in Synaptic Research which is at all ambiguous has a “tooltip” associated with it. You simply hover the mouse over any part of the screen which you want this quick help for.

Using the right mouse button

There is a small number of places where you can use the right mouse button to display a pop-up menu of options – i.e. as a shortcut for carrying out common actions.

All these places are on the main contract filtering screen, and are illustrated by the screenshot below:

Using the right mouse button

The screenshot displays the 'Individual Savings Accounts' (ISA) interface. On the left, there is a sidebar with filter options under 'Features', 'Sectors', 'Conditions', and 'Stats'. The main area shows a table of 14 contracts out of 95 (15%) with 0 manually excluded. The table has columns for Company, Contract, Cash element, Stocks and shares element, and Fixed rate of interest. Three red circles with numbers 1, 2, and 3 highlight specific areas: 1 is on the 'Variable rate of interest' filter, 2 is on the 'James Hay Partnership Modular Stocks & Shares ISA' contract name, and 3 is on the 'Fixed rate of interest' column header.

Company	Contract	Cash element	Stocks and shares element	Fixed rate of interest
ABGON Retirement Ch	ABGON Stocks & Shares ISA	Yes	Yes	No
Avialon Investment Sei	Freedom ISAs	No	Yes	No
Aviva Wrap UK Ltd	Aviva Wrap ISA Portfolio	No	Yes	No
AXA Elevate	Elevate Stocks & Shares ISA - Explic	Yes	Yes	No
James Hay Partnership	James Hay Wrap ISA	No	Yes	No
James Hay Partnership	Modular Stocks & Shares ISA	Yes	Yes	Yes
Novia	Novia Stocks & Shares ISA	Yes	Yes	No
Nucleus	Nucleus ISA account	Yes	Yes	No
Seven Investment Mar	ISA (Stocks and Shares)	Yes	Yes	No
Standard Life Assuranc	Standard Life FundZone ISA	Yes	Yes	No
Standard Life Assuranc	Wrap ISA	Yes	Yes	No
Wealthtime	Wealthtime ISA	No	Yes	No
Zurich Intermediary Pl	Zurich Intermediary Platform - Cash	Yes	Yes	No
Zurich Intermediary Pl	Zurich Intermediary Platform Stocks	Yes	Yes	No

1. Right-clicking over a field name displays a list of options for the field, such as **Show definition**.
2. Right-clicking over a contract name provides options for showing all the linked funds on the contract, manually excluding the contract from the grid etc.
3. Right clicking over a column header in the grid provides options for removing and sorting on it.