

How do I create Multiple Reports on Synaptic Research?

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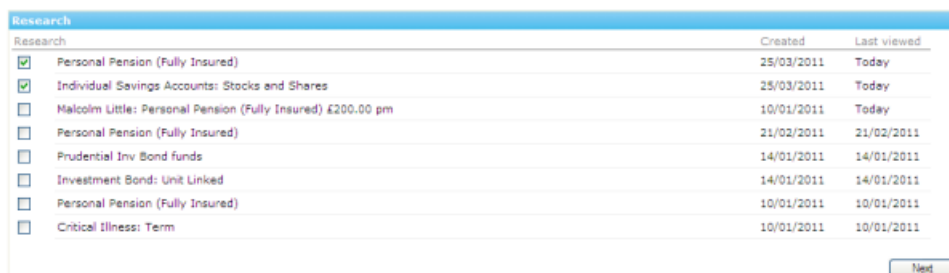
This article explains how to produce a Suitability Report for multiple pieces of research.

To be able to use this part of Synaptic, the Multiple Report licence on Synaptic is required. If you do not have this please contact our Customer services team, they will enable this for you.

When the second/third piece of research for a client has been completed, the multiple suitability report can be accessed from the **Reports** button on the Menu Bar. There will be a **Multiple Reports - Client Name** which needs to be selected:



Once this has been selected, choose the pieces of research for which this suitability report needs to be written:



Once done, click **Next**. Now select the sections that need to be added into the letter. Use the **Add button** at the end of each section to add the relevant sections into the multiple suitability report:

Multiple Reports [Back to research selection](#) | [help](#)

Templates					
Product	Base	Template name	Research	Last viewed	Action
General	All	Introduction - Multi Sale			Add
Personal Pension (Fully Insured)	Personal Pension (Fully Insured)	Definitions - PPP	Personal Pension (Fully Insured)	25/03/2011	Add
Personal Pension (Fully Insured)	Personal Pension (Fully Insured)	Research - Personal Pension	Personal Pension (Fully Insured)	25/03/2011	Add
Individual Savings Accounts	Stocks and Shares	Definitions - ISA	Individual Savings Accounts: Stocks and Shares	25/03/2011	Add
Individual Savings Accounts	Stocks and Shares	Research - ISA	Individual Savings Accounts: Stocks and Shares	25/03/2011	Add

Multiple Report			
Product	Template name	Research	Action
General	Introduction - Multi Sale		Remove
Personal Pension (Fully Insured)	Definitions - PPP	Personal Pension (Fully Insured)	Remove
Personal Pension (Fully Insured)	Research - Personal Pension	Personal Pension (Fully Insured)	Remove
Individual Savings Accounts	Definitions - ISA	Individual Savings Accounts: Stocks and Shares	Remove
Individual Savings Accounts	Research - ISA	Individual Savings Accounts: Stocks and Shares	Remove

[Generate Report](#)

Once all the relevant sections have been added into the Suitability Letter, use the **Generate Report** button to generate the letter.

Work through the tabs answering for questions that have been added:

Enter report information

This report template contains fields which need to be completed based on information from the client's fact-find, manually, or you can complete some of the information on this screen before generating the report.

If you are using Word 97 or lower please click here

[Download basic template](#)

[Introduction - Multi Sale](#) | [Definitions - PPP](#) | [Research - Personal Pension](#) | [Definitions - ISA](#) | [Research - ISA](#)

Costs and Services documentation

- Advisers own material
- CIDD
- SCDD

Marital Status

- Married
- Single
- Divorced
- Separated
- Widowed

[Create complete multiple report](#)

Once completed, click **Create complete multiple report**.

Check the suitability report now for red text to check the information or to input the required information. Once completed, select all the text and change the colour to black.

As this letter is produced in Word, save the letter to your PC or Server as appropriate. If this is not done, all your amendments will be lost.