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:

	PITA CIAL SOFTWARE	Per		
Choose	Choose a report template Fund picker & Back to			
1. Cho	ose the contract you are recommending (if any)			
-	(No recommendation)			
1	Scottish Widows The Retirement Account - Nil Commission			
2	Prudential Intermediary Division Pru Flexible Retirement Plan			
3=	Scottish Widows The Retirement Account - Flexible Commission			
3=	Scottish Widows The Retirement Account - Scaled Commission			
5	Scottish Life (Royal London) Pension Portfolio (Financial Advisers Fee)			
6=	Legal & General L&G (available on Cofunds) Portfolio Plus Pension			
6=	Legal & General Portfolio Plus Pension			
Qu Standa	k on a report template Ick reports (open in your browser) ard research report eet for the selected contract	Report Manager suitability reports (download as RTF) Research Report Standard Report - Personal Pension Multiple Reports - Malcolm Little		

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

Rese	arch	
Research		Created Last viewed
•	Personal Pension (Fully Insured)	25/03/2011 Today
*	Individual Savings Accounts: Stocks and Shares	25/03/2011 Today
	Malcolm Little: Personal Pension (Fully Insured) £200.00 pm	10/01/2011 Today
	Personal Pension (Fully Insured)	21/02/2011 21/02/2011
	Prudential Inv Bond funds	14/01/2011 14/01/2011
	Investment Bond: Unit Linked	14/01/2011 14/01/2011
	Personal Pension (Fully Insured)	10/01/2011 10/01/2011
	Critical Illness: Term	10/01/2011 10/01/2011

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

CAPITA Choose templates fo								
Multiple Reports			14	Back to research sele	ction H			
remplates								
Product	Basis	Template name	Research	Last viewed	Action			
General	Al	Introduction - Hulti Sale			Add			
Personal Pension (Fully Insured)	Personal Pension (Pully 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 - 18A	Individual Savings Accounts: Stocks and Shares	25/03/2011	Add			
Nultiple Report								
Product	Template name	Resea	14-	Activ	-			
Seneral Introduction - Multi Sale				Rem				
Personal Pension (Fully Insured) Definitions - PPP		Personal Pension (Fully Insured)		Remove				
Personal Pension (Fully Insured) Research - Personal Pe		sion Personal Pension (fully Insured)		Remove				
Individual Savings Accounts Definitions - ISA		Individual Bavings Accounts: Btocks and Shares		Remove				
Individual Savings Accounts Research - ISA		Individual Savings Accounts: Stocks and Shares		Remove				

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:



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.