## How do I retrieve research?

Last Modified on 10/01/2024 12:36 pm GMT

Once research has been started on Synaptic it will be automatically saved if you need to leave the software.

To retrieve the research, from the **Home Page**, navigate to the **Recent** tab:

۵ ı	You have new research User list   File check   Preset oriteria   Multip Vou have new research							Multiple	
Hore	e Pension savings	Pension incom	e Life Health I	nvestment Finance	Offshore	[Recent]			
	by client name:	Find	Find by bile:	Red	Show recent				
For	information on coloure	d backgrounds	and icons click here.						^
Res	earch					Client	Last viewed	Actions	
	Investment Bond: Un	it Linked				Ben Browder	Today	Copy	
	Fund data: Pension fi	ands				(none)	Today	Copy	
	Personal Pension (Fu	lly Insured)				(none)	Today	Copy	
	Critical Illness: Term					Ben Browder	Yesterday	Copy	
	Personal Pension (Fu	ly Insured)				Ben Browder	Yesterday	Copy	
	Individual Savings A	counts: Stocks	and Shares			Sen Browder	Yesterday	Copy	
	Individual Savings A	counts: Stocks	and Shares			Sandra Bullock	Yesterday	Copy	
Term Assurance: Level				Jo-Anne Sharpe	Yesterday	Copy			

Here you will find the last twenty pieces of research that has been started. To go back to a piece of research, click on its name (on the left hand side of this screen shot).

This will take you back to the beginning of the research.

## Older Research

If your research no longer appears in the list of the last twenty pieces of research, you can use the following to search for it:



Here you can see:

## Find by client name: Find by title:

Simply type the client surname or the name of the piece of research into the appropriate field and click **Find**.

In the following screen shot, the client's surname has been added and find has been clicked, a list of research for clients with the surname **Smith** are being shown:

Home Pension savings Pension income Life Health Investment Finance Offsh	ore [Recent]			
Find by client name: anth Find Find by title: Find Shown	ecent			
For information on coloured backgrounds and icons click here.				^
Research	Client	Last viewed	Actions	
Linked funds on Aviva Life & Pensions UK Limited Personal Pension	Canada Sanata	31/08/2012	Copy	
Personal Pension (Fully Insured)	Tax of Sector	17/08/2012	Copy	
Linked funds on Aviva Life & Pensions UK Limited Personal Pension	Date of South	17/08/2012	Copy	
Individual Savings Accounts: Stocks and Shares	Date of Bendle	17/08/2012	Copy	
Investment Bond: Unit Linked	and in case of	03/08/2012	Copy	
Fund data: Unit trusts/OEICs	Date of Second	20/07/2012	Copy	
Manual fund list (conversion)	10.000	08/06/2012	Copy	
Fund data: Hanual fund list	Daniel Street	25/05/2012	Copy	
h: Existing portfolio	Taxa South	25/05/2012	Copy	
Linked funds on Aviva Life & Pensions UK Limited Personal Pension	Date of the local division of the local divi	25/05/2012	Copy	
Individual Savings Accounts: Stocks and Shares	Dance Street	23/05/2012	Copy	
D Smith existing portfolio	Danie ment	18/05/2012	Copy	
Linked funds on Aviva Life & Pensions UK Limited Personal Pension	Date of Street, or	18/05/2012	Copy	

To go back into one of these, simply click on the name of the piece of research.

If the research has a pink background and a red date, this indicates that since this piece of research has been started the system has been updated. This means that your piece of research could be out of date.

A message appears if you click on a piece of research with a pink background:

1	Message	e from webpage
	<u>.</u>	This piece of research has been reopened using the same oriteria as originally intended, wherever possible. It is possible that database structures can change between data updates - it is your responsibility to check the validity of the updated research.

Work through the research to ensure that any contract you were looking to recommend is still relevant, as there may have been changes which means that it no longer is.

Alternative way of finding client focused research

You can also use the **Client** tab to find client focused research:



Enter the client's name and click **Go**. Select the client from the list and the research will be listed under **List Research**:



Click on the name of the research to go back onto it.