How do I retrieve research?

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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:

Home Pension savings	Pension income Life Health	Investment Finance	Offshore	[Recent]			
ind by client name:	Find Find by bile:	Red	Show recent				
For information on coloure Research	Client	Last viewed	Actions				
Investment Bond: Unit Linked				Ben Browder	Today	Copy	
Fund data: Pension funds				(none)	Today	Copy	
Personal Pension (Fully Insured)				(none)	Today	Copy	
Critical Illness: Term			Ben Browder	Yesterday	Copy		
Personal Pension (Fully Insured)			Ben Browder	Yesterday	Copy		
Individual Savings Ar	counts: Stocks and Shares			Sen Browder	Yesterday	Copy	
Individual Savings Ar	counts: Stocks and Shares			Sandra Bullock	Yesterday	Copy	
Term Assurance: Lev	al			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:

	recent		
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 Series	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 Second	17/08/2012	Copy
Individual Savings Accounts: Stocks and Shares	Date of Design	17/08/2012	Copy
Investment Bond: Unit Linked	TRACT PARTY.	03/08/2012	Copy
Fund data: Unit trusts/CEICs	Date of South	20/07/2012	Copy
Manual fund list (conversion)	10.000	08/06/2012	Copy
Fund data: Manual fund list	Date Street	25/05/2012	Copy
h: Existing portfolio	nam South	25/05/2012	Серу
Linked funds on Aviva Life & Pensions UK Limited Personal Pension	Date Street	25/05/2012	Copy
Individual Savings Accounts: Stocks and Shares	Dance were	23/05/2012	Copy
D Smith existing portfolio	Tax is more	18/05/2012	Copy
Linked funds on Aviva Life & Pensions UK Limited Personal Pension	Taxan Series	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	from webpage
	♪	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.