



SYNAPTIC PRODUCT & FUND

USER GUIDE



SYNAPTIC
PRODUCT
& FUND

Version 1.0

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1. Introduction

This guide will explain how to create or edit reports within Synaptic Manager (our disk based version) and then upload these reports to Synaptic Research (our online version). This manual is not meant to replace any training, but to give users a guide to refer back to.

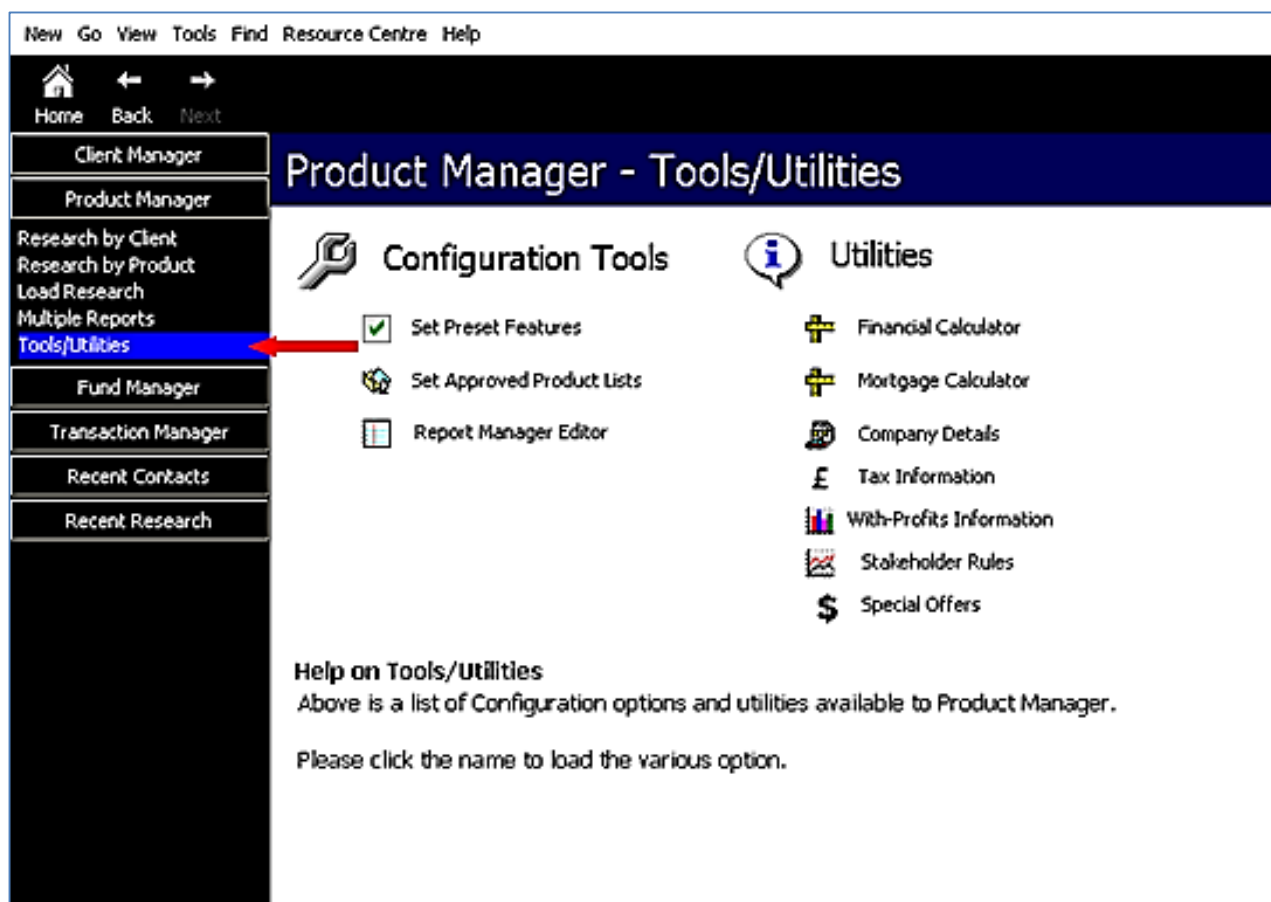
2. Report Editor

Within Product Manager each product has its own unique report template; each one is made up of a series of **Sections**, **Paragraphs** and **Merge Fields**. These templates can be customised to meet your objectives and the demands of compliance.

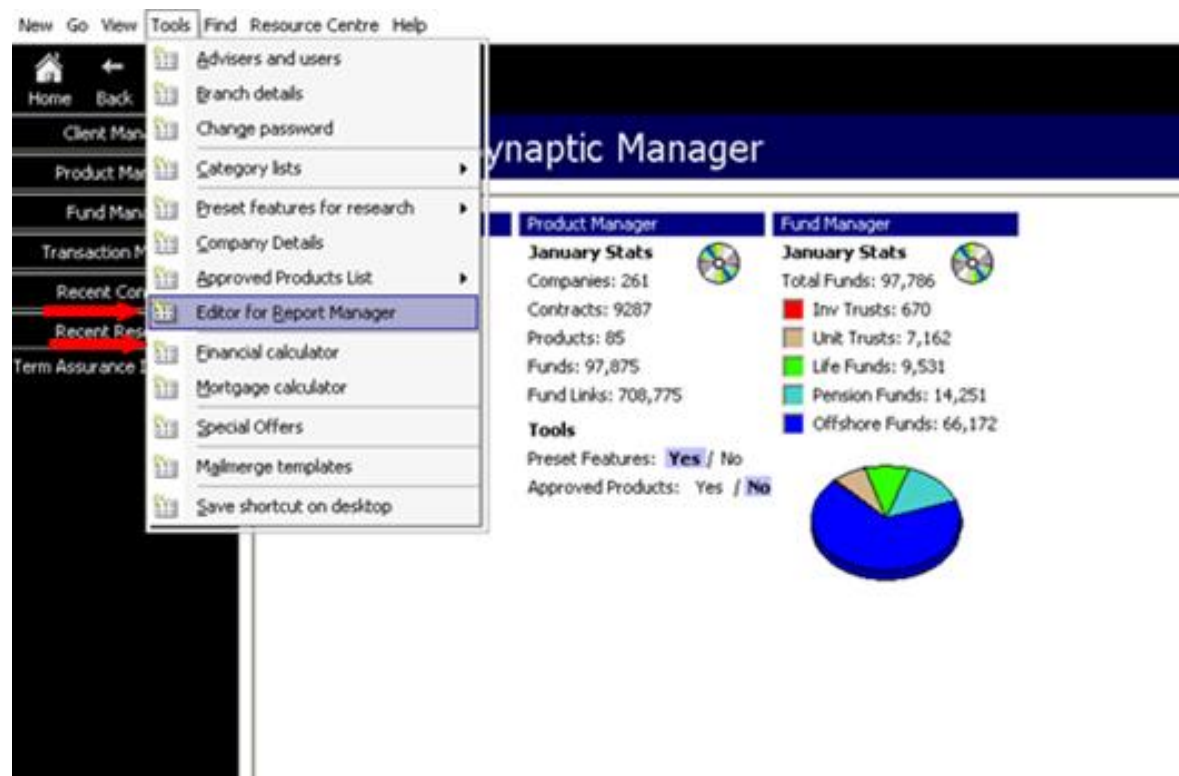
Accessing the Report Editor

Once Synaptic Manager has been signed into, there are two places where access to the Report Editor can be found:

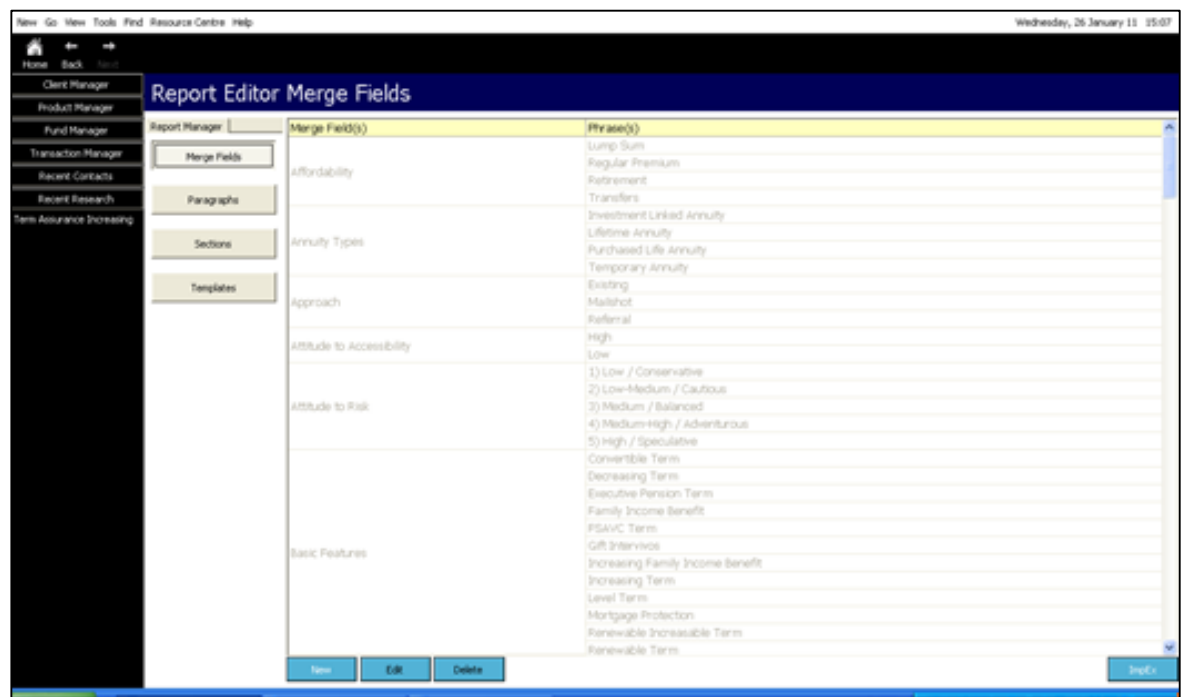
1. Within Product Manager in the menu



2. From within Tools on the menu bar



Once in report editor, the following will be displayed:



Using Report Editor

There are 4 sections of the Editor:

- 1. **Merge Fields** – an area in a paragraph where there is more than one choice of text available i.e. Lump Sum or Regular Premium.
- 2. **Paragraphs** – these contain the main text within the report.
- 3. **Sections** – these will be the headings that make up the report.
- 4. **Templates** – are the structure of the reports.

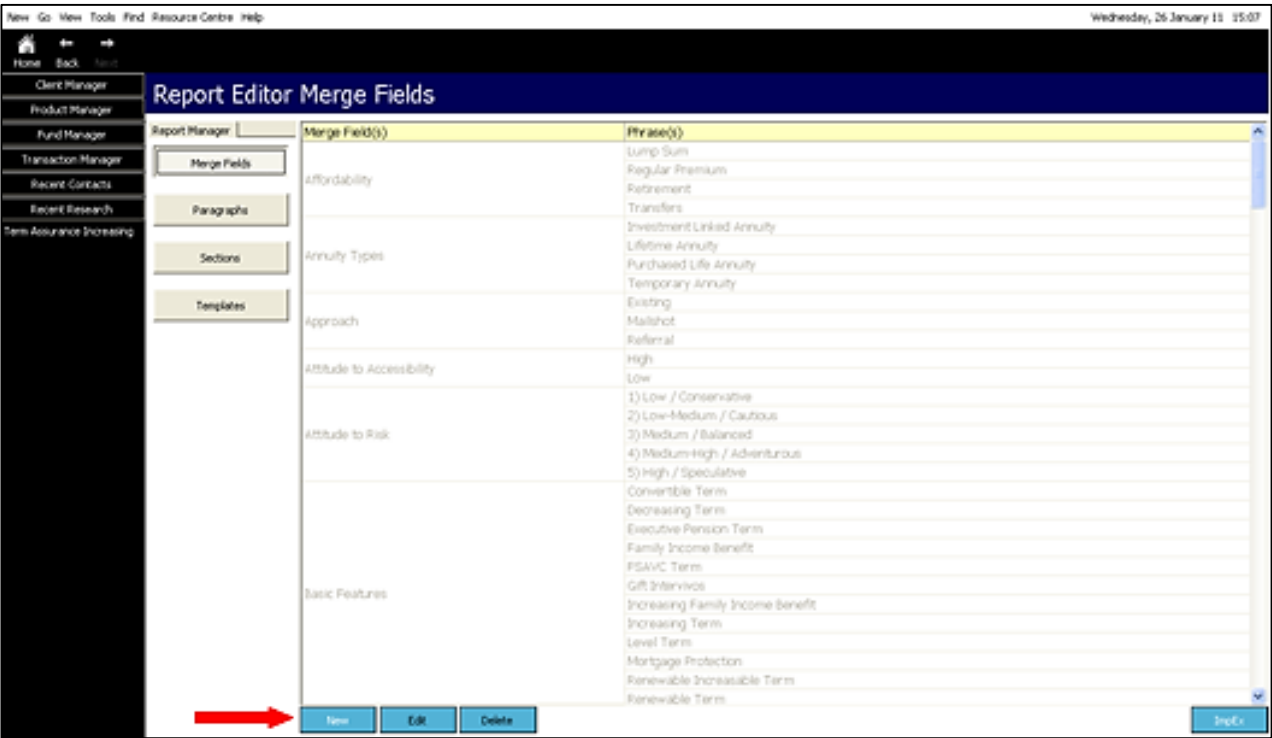
All text which is in grey is owned by Synaptic and **cannot be changed**. Synaptic will keep these standard paragraphs up to date. Any items that are added by your company will show in black.

Setting up Merge Fields

Merge fields can consist of single word options or large paragraphs of text.

Adding a New Merge Field

To add a new Merge Field, click on the **Merge Fields** button and this will display all the current Merge Fields in the system. To add a new one, use the button at the bottom of the page:



Once 'New' is clicked the following will be displayed:

The screenshot shows the 'Report Editor Merge Fields' window. It has a dark blue header with the title 'Report Editor Merge Fields'. Below the header is a toolbar with icons for undo, redo, bold, italic, underline, bulleted list, numbered list, ABC, and a dropdown arrow. The main area is divided into two panes. The left pane contains a 'Phrase Title' text box, an 'Allow Multiple Selection' checkbox, and an 'Options' list box. The right pane is a large text area. Two callout boxes are present: one pointing to the 'Phrase Title' text box with the text 'Complete the 'Phrase Title''. Another callout box points to the 'Allow Multiple Selection' checkbox with the text 'If the Merge field will have more than one option, click into the 'Allow Multiple Selection' checkbox'.

Now add the first option title and click the '+' button and then type the details into the white box.

The screenshot shows the 'Report Editor Merge Fields' window after the first option has been added. The 'Phrase Title' text box now contains the text 'Where was the meeting?'. The 'Allow Multiple Selection' checkbox is checked. The 'Options' list box now contains one option, 'Clients home', which is highlighted in blue. A '+' button is visible to the right of the 'Options' list box. The right pane now contains the text 'at your home.'.

Repeat this until all of the different options have been entered.

Note: Apostrophes cannot be used within the **Options**

Report Editor Merge Fields

Phrase Title






Where was the meeting?

☒ Allow Multiple Selection

Options

Clients home

Clients office

 **B** *I* U    

in your office.

Once this has been done, use the 'Save' button:

Save Cancel Delete

The Merge field which has just been added will now show in the Merge field lists, in alphabetical order, and will be in black:

Term Risks	Convertible Term Assurance
	Decreasing Term
	Level Term
	Mortgage Protection
	Term Assurance
Trusts	Term Assurance with tax relief
	Not written in trust
Where was the meeting?	Trust recommended
	Clients home
Wills	Clients office
	No Will
	Will up to date

New

Edit

Delete

ImpEx

This Merge field can be edited and deleted.

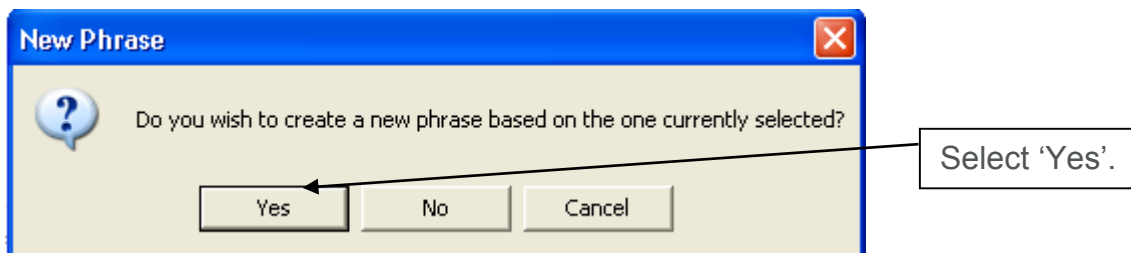
Creating Merge Fields from an Existing Merge Field

In some cases, a new Merge field is required but it will have some options that another Merge field already has. In this case, the original Merge field can be used as a template for the new one.

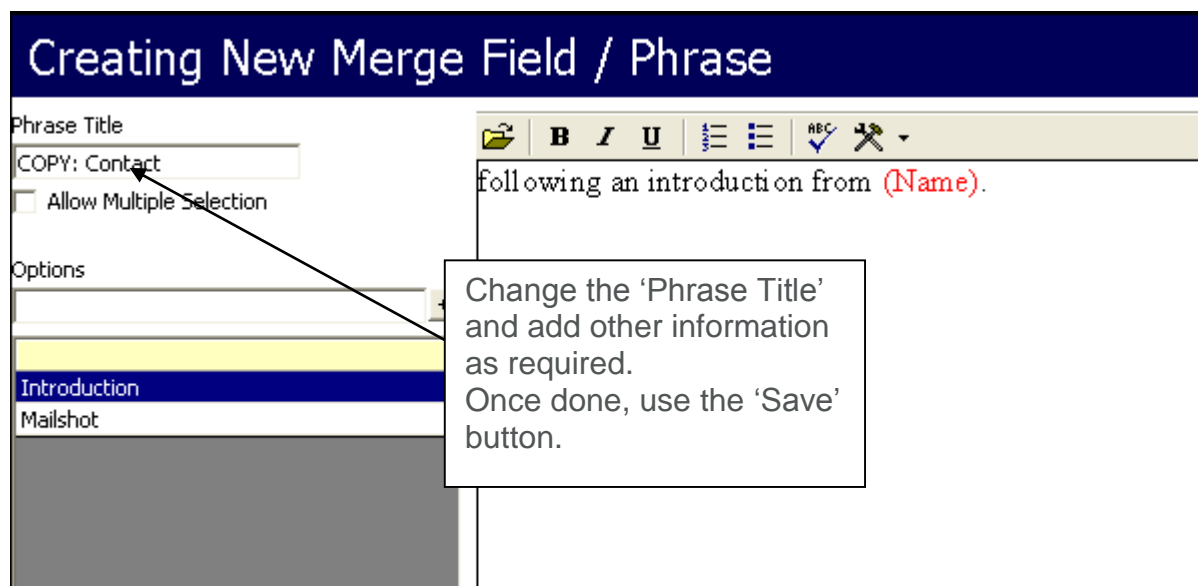
To do this, click onto the current Merge field that needs to be used and then select the 'New' button:



The following message will appear:



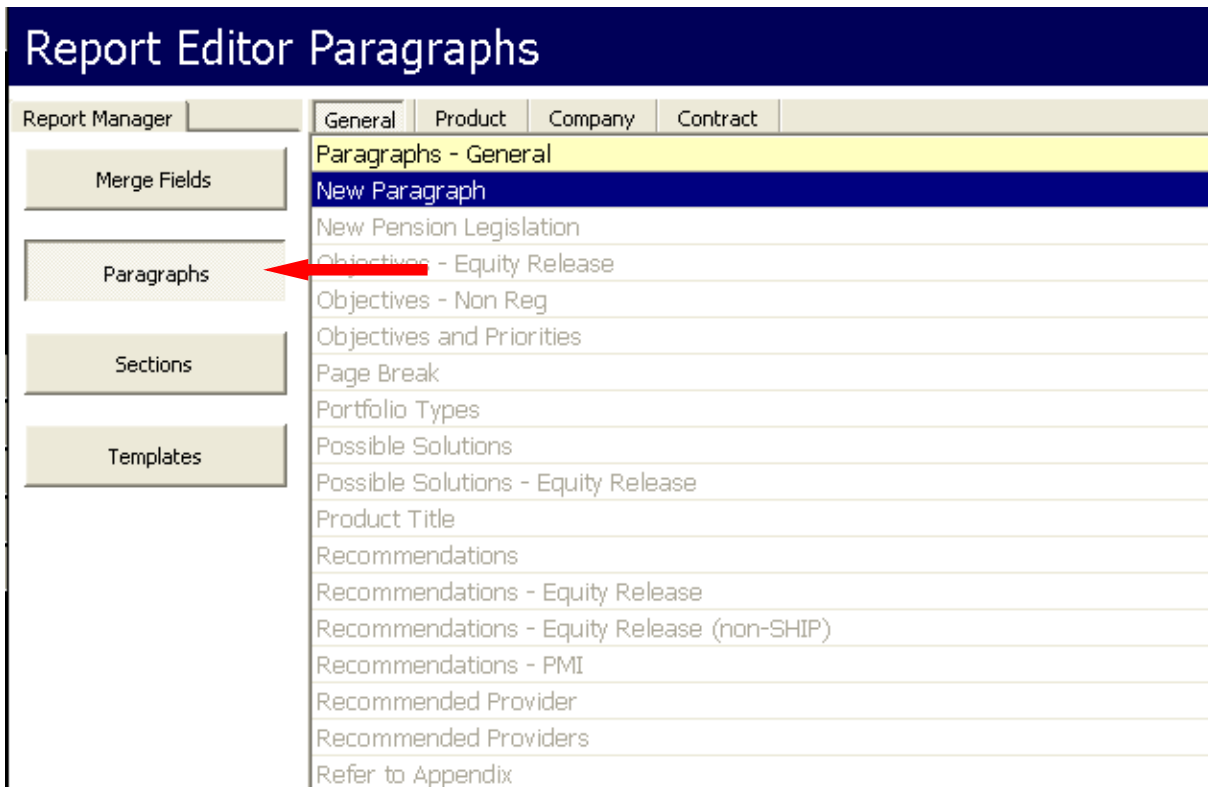
Now amend the information on the original Merge field:



Once completed, the item that has been created will appear in the list of the Merge fields in black, which confirms that it has been added to the Synaptic list.

Setting up Paragraphs

A paragraph can be made up of text, or of a combination of text and Merge fields. To set up a Paragraph, click on the ‘Paragraph’ button:

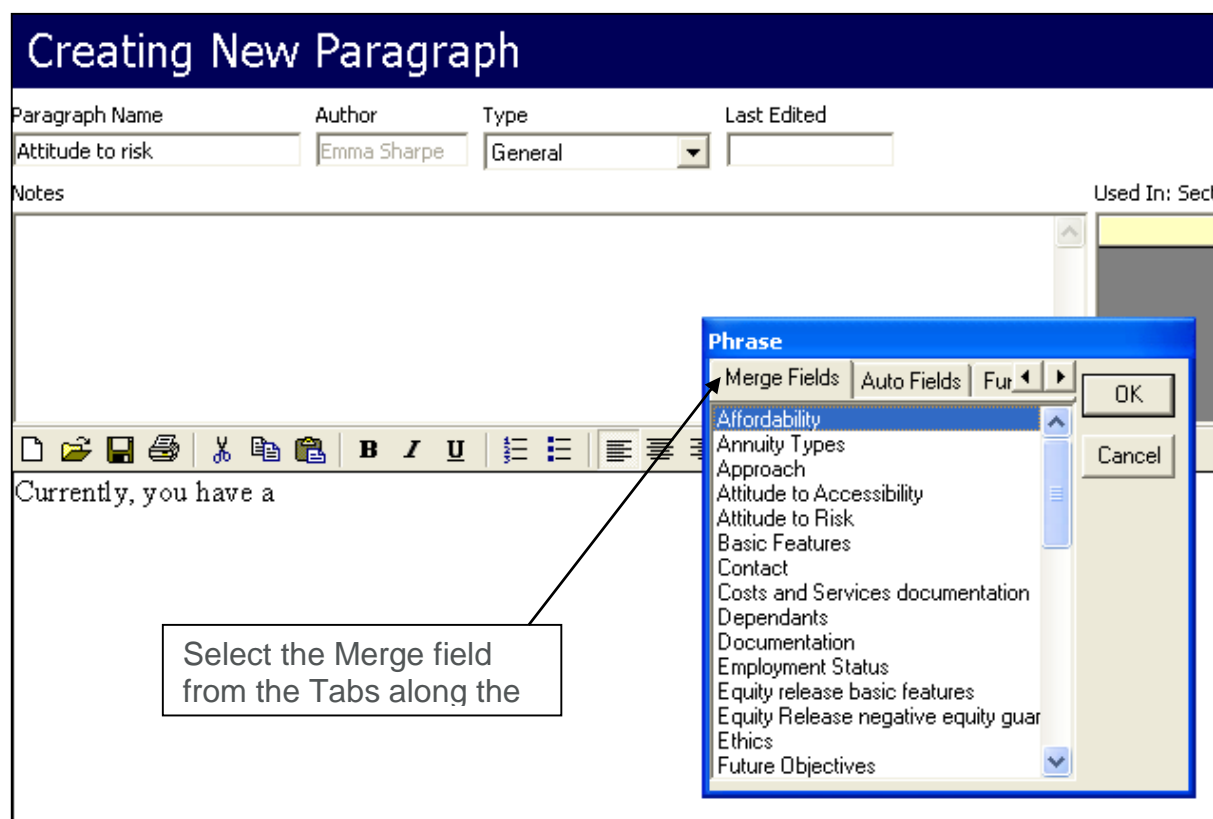


Within this section there are 4 tabs which represent the different sections that can be set up within a template. All of the Paragraphs in grey are owned by Synaptic and cannot be changed or deleted.

Adding a new Paragraph

Use the ‘New’ button to add a Paragraph:

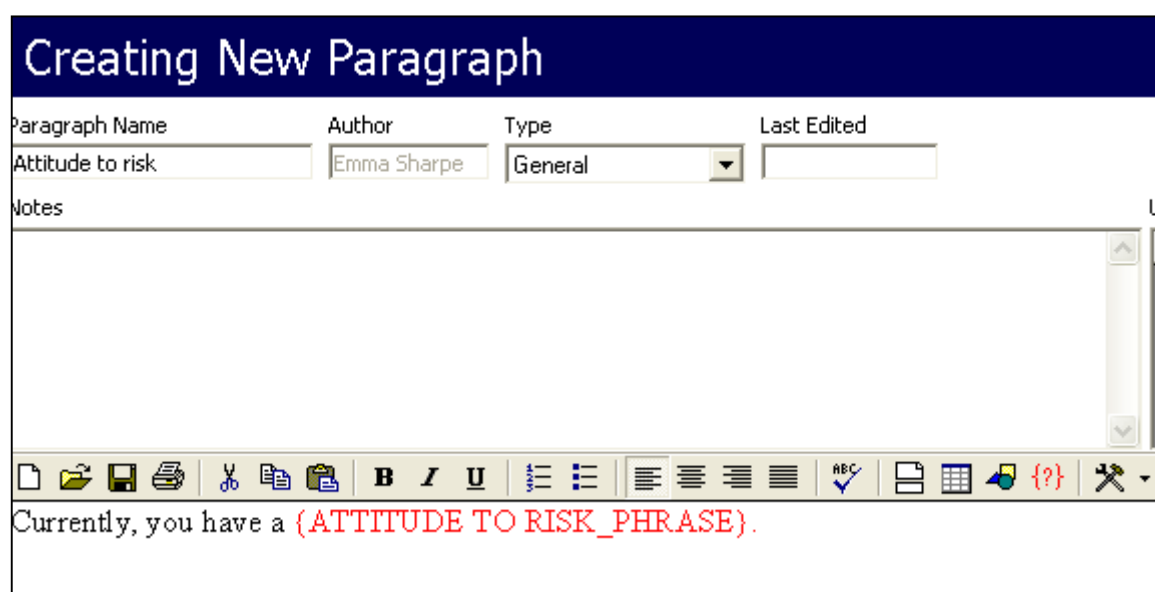




The Tabs contain different information:

5. Merge Fields contains all Synaptic owned and new Merge Fields
6. Auto Fields contain information that is pulled through from the Research i.e. Client Name, Policy Term, Product Type. **The Auto field list cannot be added to.**
7. Functions contains additional fields of information to be inserted into the Paragraph such as: Date, Monetary amount.

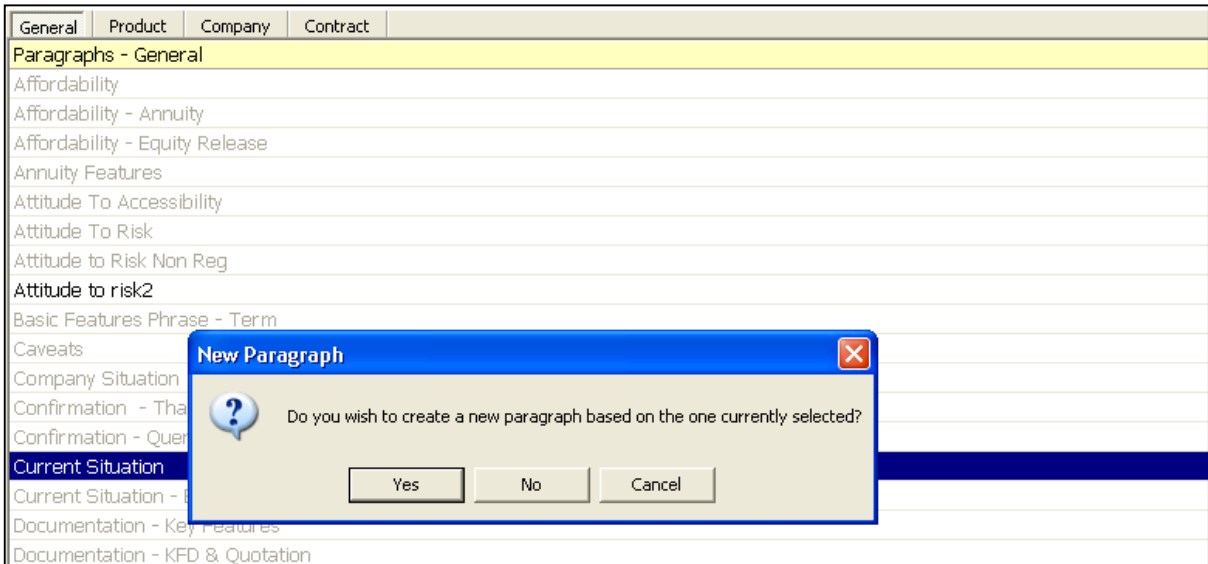
Once the field has been chosen, red text will be put with { } to indicate that this is a Merge field.



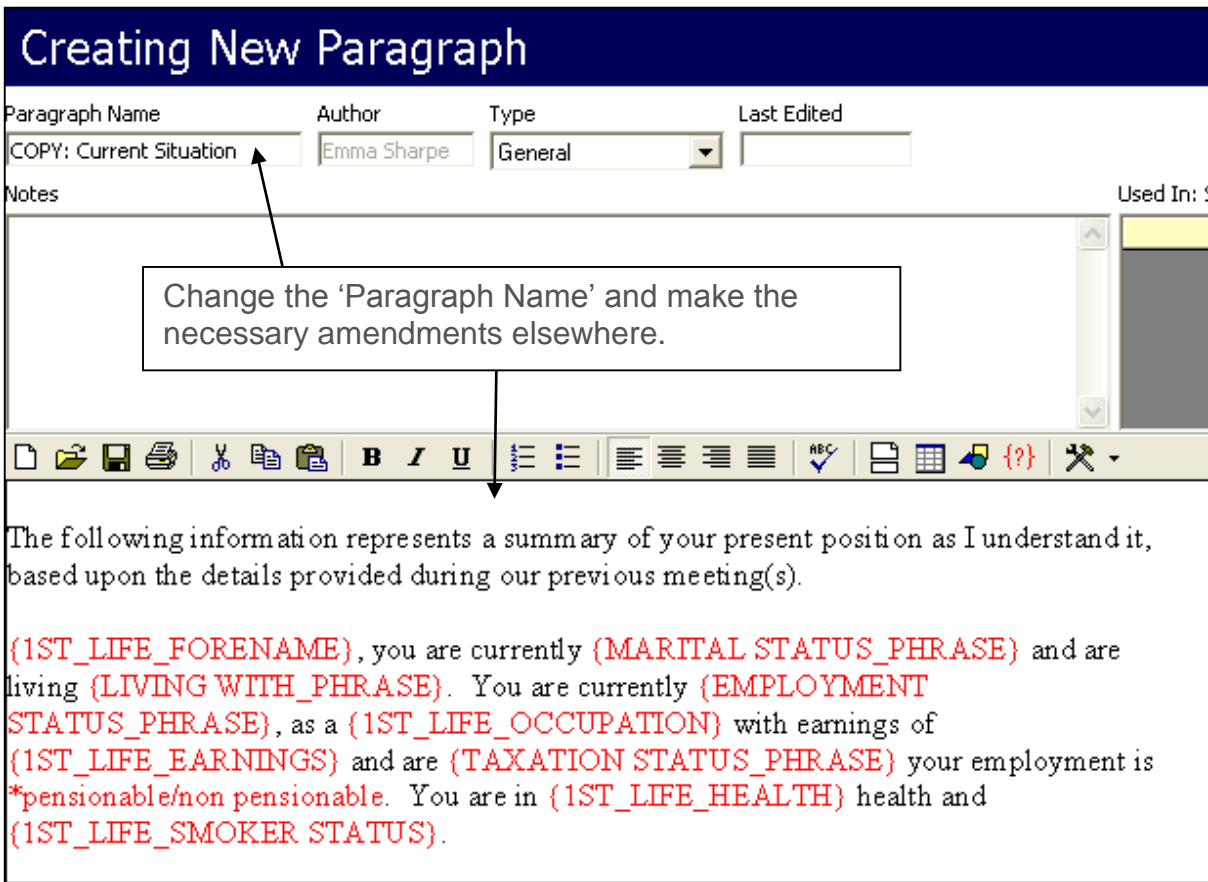
Ensure that the { } are not deleted from here. If one of them is the Merge field will not work. Use the 'Save' button once finished.

Adding a new Paragraph from an Existing Paragraph

If an existing Paragraph has some of the characteristics of an existing Paragraph, the existing one can be use as a template. To do this click on the Paragraph that is to be used as a template and then ‘Add’:



Select ‘Yes’ for this question.



Once all the amendments have been made, use the ‘Save’ button. Your Paragraph will now be added to the list.

Sections

Sections are the headings that are going to make up your Letters and Reports. Additional Sections can be added when required.

Adding a new Section

To add a new Section header, click on the ‘Section’ button:

Report Editor Sections

Report Manager

Merge Fields

Paragraphs

Sections

Templates

Sections
Additional Benefits
Affordability
Aims & Objectives
Appendix
Assets
Attitude to Risk
Basic Features
Caveats
CI Cover
Commission
Confirmation
Current Situation
Definitions
Dependants
Documentation
Economic Assumptions
Execution Only
Financial Priorities
Fund Selection

Use the ‘Add’ button at the bottom of the page and add in the Section heading. Type in the Section name and ‘Save’ the information.

Creating New Section

Section Name

Notes

Used in these Templates

Add the ‘Section Name’ in. Additional ‘Notes’ can be added if required.

Once done, click the ‘Save’ button.

Report Editor Sections

Report Manager

Merge Fields

Paragraphs

Sections

Templates

Sections

Additional Benefits

Additional information

Affordability

Aims & Objectives

Appendix

Assets

Attitude to Risk

Basic Features

Caveats

CI Cover

Commission

Confirmation

Templates

There are a number of set Templates within Synaptic, however new Templates can be added from scratch or can be based on an existing Template.

Creating a New Template

To create a new Template, click on the ‘Template’ button and then use the ‘New’ button:

Report Editor Templates

Report Manager

Merge Fields

Paragraphs

Sections

Templates

Templates

Definitions - PPP

Definitions - Annuities

Definitions - Child Trust Funds

Definitions - Contracted-Out Personal Pension

Definitions - Critical Illness

Definitions - Equity Release (SHIP)

Definitions - Executive Pensions

Definitions - Group Health Cash Plan

Definitions - Health Cash Plan

Definitions - Income Drawdown

Definitions - Investment Bonds

Definitions - Investment Trusts

Definitions - ISA

Definitions - Long Term Care

Definitions - Maximum Investment Plan

New

Edit

Delete

There are a number of different sections available with this Templates area:

Definitions (Product Type) – contains definitions of selected product. Only available within Multiple Reports.

Introduction Multi Sale – introduction Template for all Multiple Reports. A Generic Template that is only available within Multiple Reports.

Product Focused Report – contains details of selected company and contract, including selected Features and Conditions. A single report template that can only be accessed during Product Focused Research.

Research (product Type) – contains research details of selected product. Only available within Multiple Reports.

Research Report – contains details of Client Focused Research for a specific product. A single report template that can only be accessed in Report Tab at the end of Client Focused Research.

Standard Report (Product Type) – a template that can be used as the Suitability Report. Only available within single reports at the end of Client Focused Research.

To create a new Letter template:

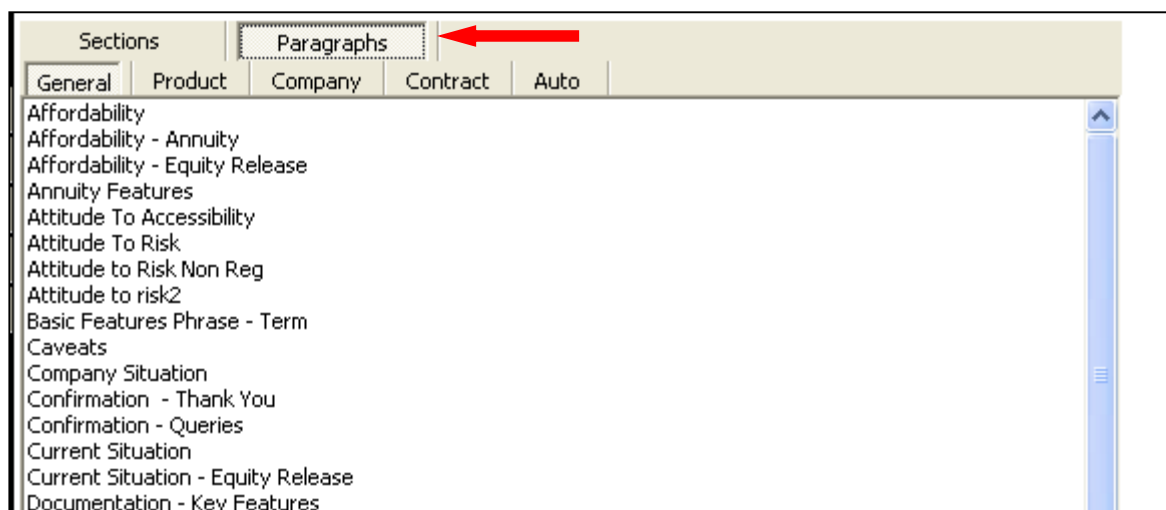
Creating New Template

Template Name: Author: Product: Template Basis:

Notes:

Sections | Paragraphs

- Additional Benefits
- Additional information
- Affordability
- Aims & Objectives
- Appendix
- Assets
- Attitude to Risk
- Basic Features
- Caveats
- CI Cover
- Commission
- Confirmation
- Current Situation
- Definitions
- Dependants
- Documentation
- Economic Assumptions
- Execution Only
- Financial Priorities
- Fund Selection
- Income
- Income Protection
- Inheritance Tax Planning
- Introduction
- Investment Risk Warnings
- Liabilities
- Life Cover



There will be standard Sections and Paragraphs that will be automatically included within a letter and there will be a number of optional Sections and Paragraphs that can be added.

To use this software, the Sections need to be selected and then the Paragraphs added to the relevant Sections.

To create a new Template, select the relevant Sections and move them into the letter:

Creating New Template

Template Name: Author: Product: Template Basis:

Notes:

Sections: Paragraphs:

General Product Company Contract Auto

Affordability
Affordability - Annuity
Affordability - Equity Release
Annuity Features
Attitude To Accessibility
Attitude To Risk
Attitude to Risk Non Reg
Attitude to risk2
Basic Features Phrase - Term
Caveats
Company Situation
Confirmation - Thank You
Confirmation - Queries
Current Situation
Current Situation - Equity Release
Documentation - Key Features
Documentation - KFD & Quotation
Emergency Fund
Fund Selection - Group schemes
Fund Selection - Unit Linked Fund
Intro - Non Reg
Introduction
Introduction - Equity Release
Introduction - How Research Was Conducted
Introduction - Report Cover (Group)
ISA Description
Mortgage Regulation
Needs and Shortfalls - Non Reg
New Pension Legislation

Choose a Section or Paragraph and use this button to move.

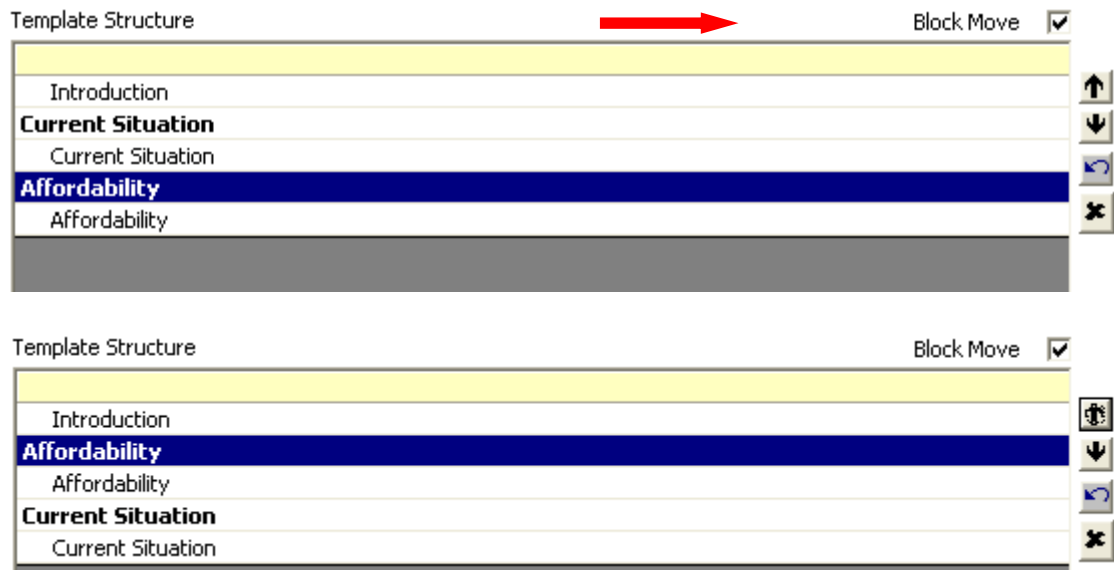
Template Structure

Block Move

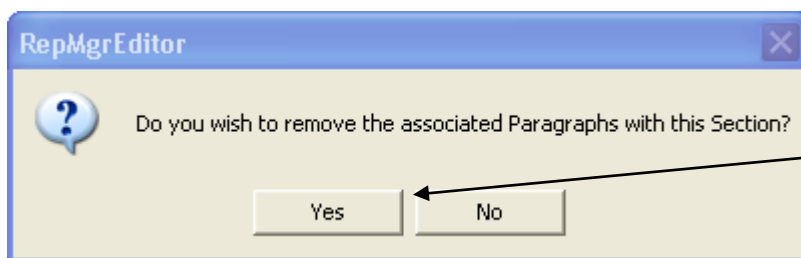
Introduction
Affordability
Affordability

The items moved will appear in here and can be moved using the up and down arrows.

Sections are shown in **bold** text. Paragraphs are not. It is possible to move a Section by hi-lighting the Section and using the arrows, or it may just be a Paragraph which needs to be moved, so just hi-light that and use the arrows. To move a Section and Paragraph together, hi-light the Section and use the 'Block Move' button.



To delete a Section and Paragraph use the 'X' button and ensure that the 'Block Move' button is checked. A message will appear:



Answer as appropriate.

Once completed your Template should look like this:

Template Structure

Block Move ☒

Introduction

Affordability

Affordability

Current Situation

Current Situation

Objectives & Priorities

Objectives and Priorities

Recommendations

Recommendations

Recommended Provider

Current Situation - No Provision (PPP)

New Pension Legislation

Possible Solutions

Possible Solutions

Basic Features

Basic Features - Personal Pension

Fund Selection - Managed Fund

Risk Warnings - Personal Pension

Product Description

Recommendations - All Pension

Additional Benefits - Indexation

Additional Benefits - Premium Waiver Benefit

Reviews

Reviews

Trusts

Trusts

Wills

↑

↓

↶

✕

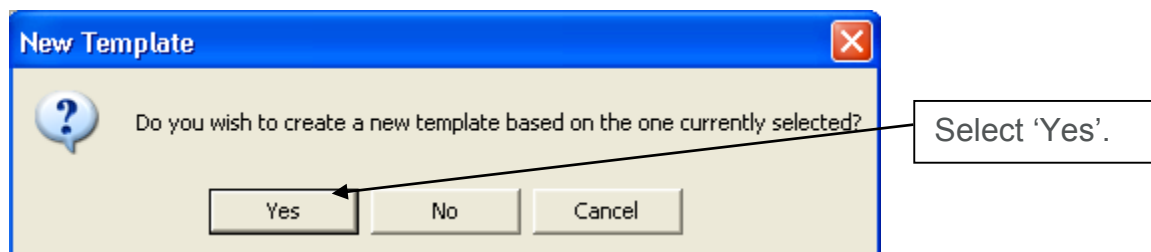
Preview

Use the 'Preview' button to view the template. Ensure that nothing is hi-lighted or when the 'Preview' button is used, it will just preview that hi-lighted bit.

Creating a New Template from an Existing Template

If a new Template is needed, but is similar to one that already exists, the new Template can be created from the existing one. The user can then edit this Template to ensure that it fits their requirements.

Select the existing Template and click 'New'. The following message will be displayed:





The existing Template will now be copied:

Change the 'Template Name' and the 'Template Basis'. Record any additional 'Notes'.

Using the 'Template Structure' select Sections or Paragraphs to be removed. To remove a Section, including associated Paragraphs, hi-light the Section ensure 'Block Move' is checked and then use the button.

Once all irrelevant Sections/Paragraphs have been removed, add new sections into the Template Structure as described in Section 2.6.1.

If a Section needs to be moved to a different position in the Template, use the arrows  . Don't forget if you want to move the Paragraphs as well as the Section Names, have the 'Block Move' button checked.

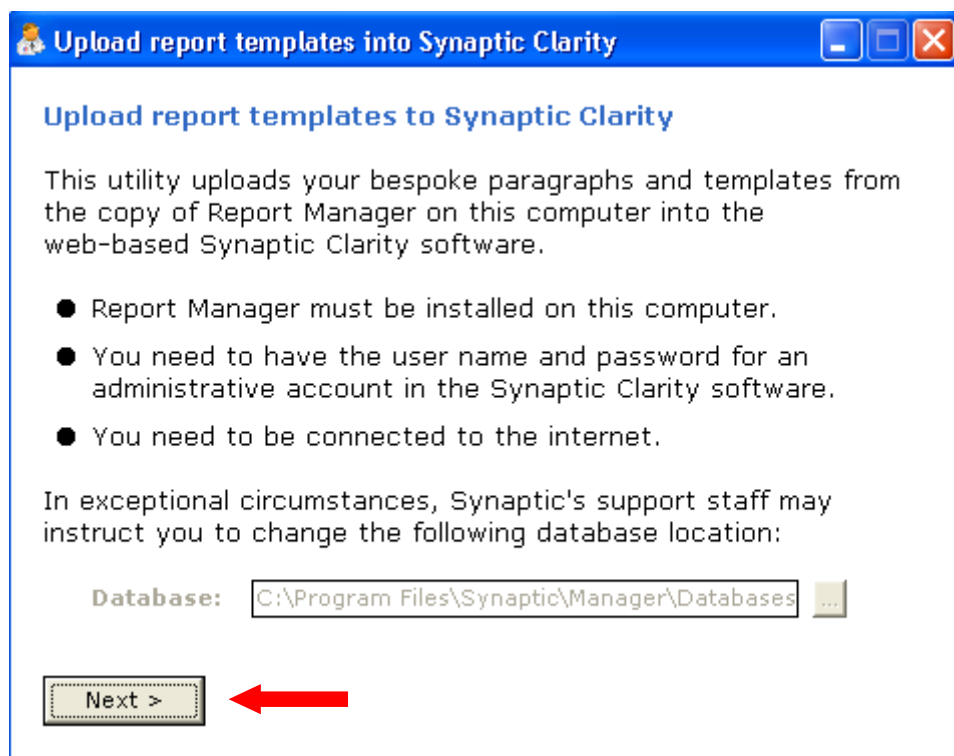
Once all amendments have been made, the letter Template can be previewed but must be saved.

Updating Synaptic Research

Once Reports have been updated they need to be transferred to Synaptic Research for use. This is done by using an additional piece of software. It is called Synaptic Research Upload and will look like this on the Desktop:

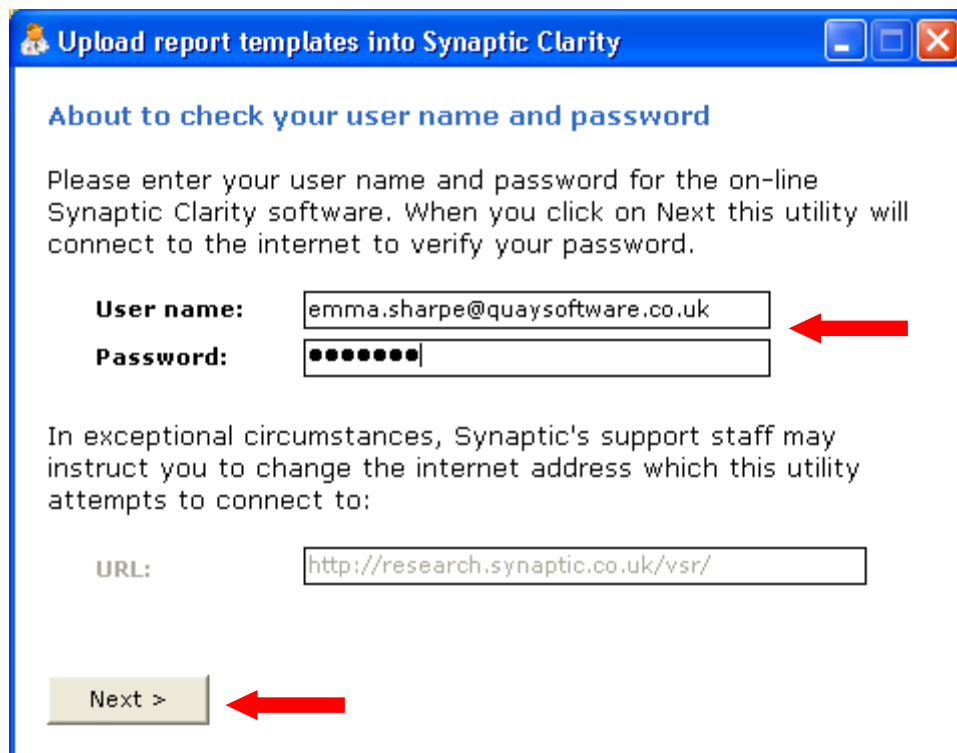


Once this icon has been clicked, the following will be displayed:



The location of the database will be "C:\program files\Synaptic\Manager\Databases\report.mdb" and this should already be shown in the 'Database' field.

Now click 'Next' and there will be a prompt for your Synaptic Research username and password. The credentials must be an administrator on the account that the reports are to be uploaded to.



Upload report templates into Synaptic Clarity

About to check your user name and password

Please enter your user name and password for the on-line Synaptic Clarity software. When you click on Next this utility will connect to the internet to verify your password.

User name:

Password:

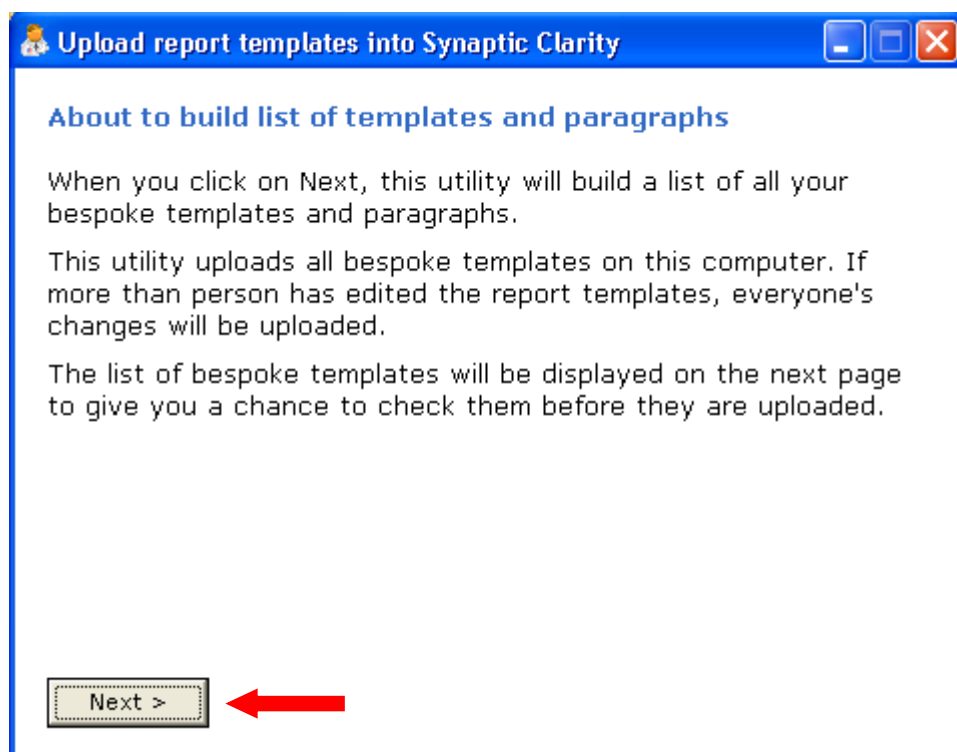
In exceptional circumstances, Synaptic's support staff may instruct you to change the internet address which this utility attempts to connect to:

URL:

Next >

Red arrows point to the password field and the 'Next >' button.

Click 'Next' at the next screen.



Upload report templates into Synaptic Clarity

About to build list of templates and paragraphs

When you click on Next, this utility will build a list of all your bespoke templates and paragraphs.

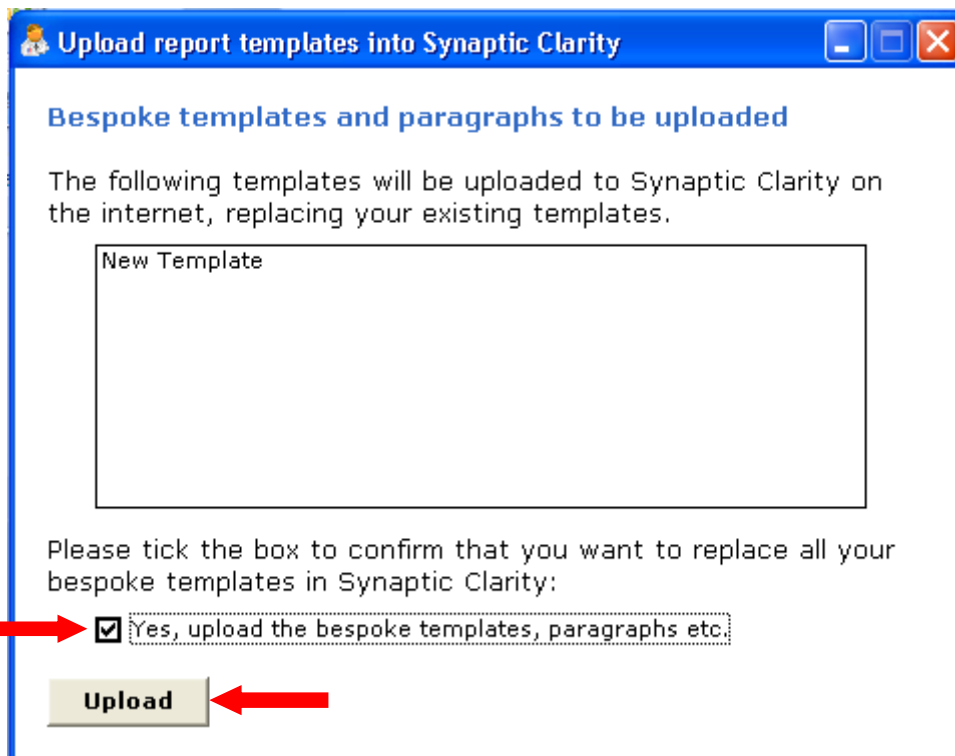
This utility uploads all bespoke templates on this computer. If more than person has edited the report templates, everyone's changes will be uploaded.

The list of bespoke templates will be displayed on the next page to give you a chance to check them before they are uploaded.

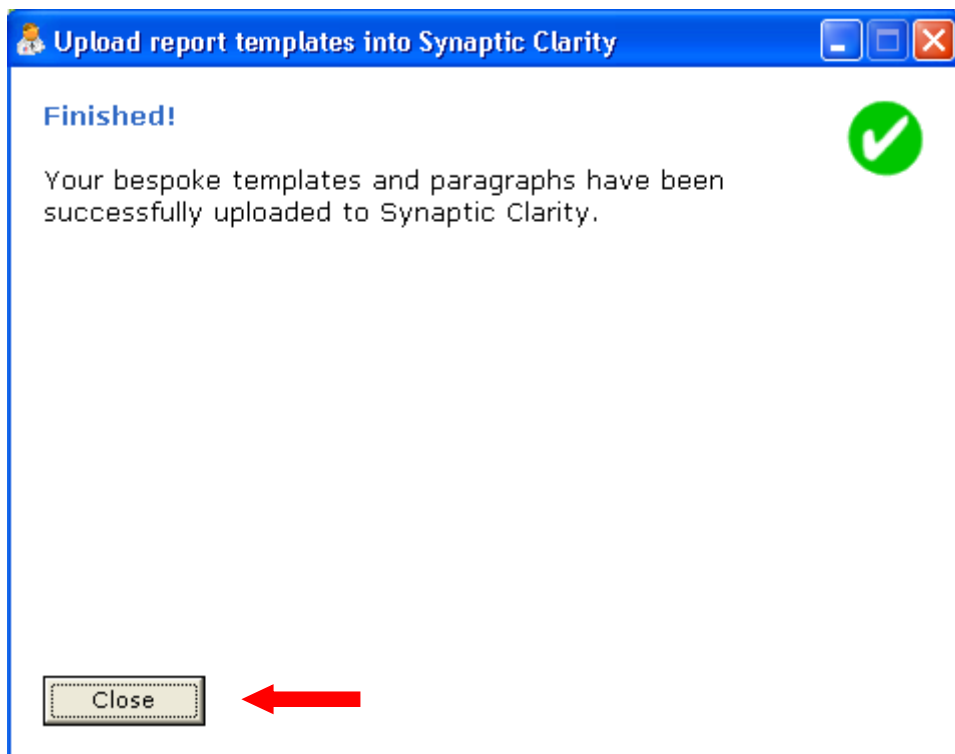
Next >

A red arrow points to the 'Next >' button.

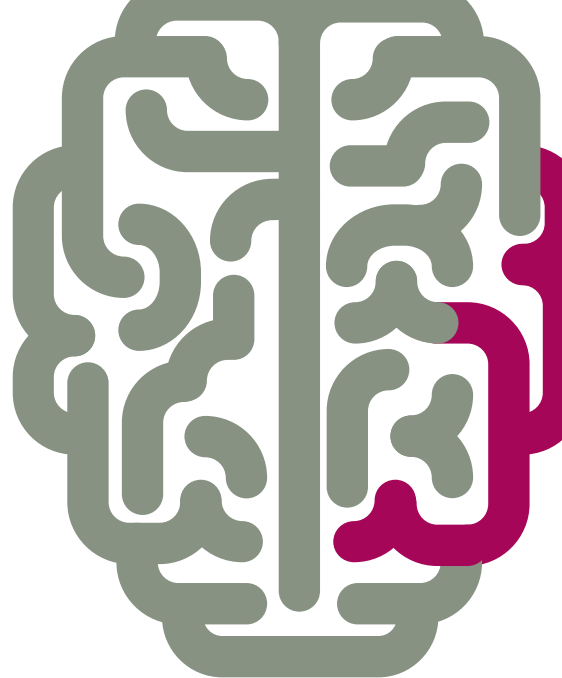
There will now be a list of Bespoke Templates. Click into the field 'Yes, upload the bespoke reports, paragraphs etc.' and then on the 'Upload' button.



Click 'Close'.



The new bespoke template will now be available to use.



Products & Services from Synaptic Software:

SYNAPTIC **CLIENT CARE**

SYNAPTIC **COMPARATOR**

SYNAPTIC **MODELLER**

SYNAPTIC **PRODUCT & FUND**

SYNAPTIC **RISK**

SYNAPTIC **WEBLINE**

SYNAPTIC **WEB SERVICES**



SYNAPTIC

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