Synaptic Contract Enquiry
Quick Start Guide

STEP 1.

www.synaptic.co.uk

- Passwords must have at least 8 characters, including a capital letter and number.
- After 3 incorrect attempts your account will lock out for 15 minutes.
- If you require a password reset, please contact the Support team.

Providers will either use a unipass certificate (which can be linked within your name at the top right>Account Settings>Certificate) or a username and password. Some providers have the option of companywide or individual user details. Check the Contract Enquiry Enterprise Messaging Platform guide for further information

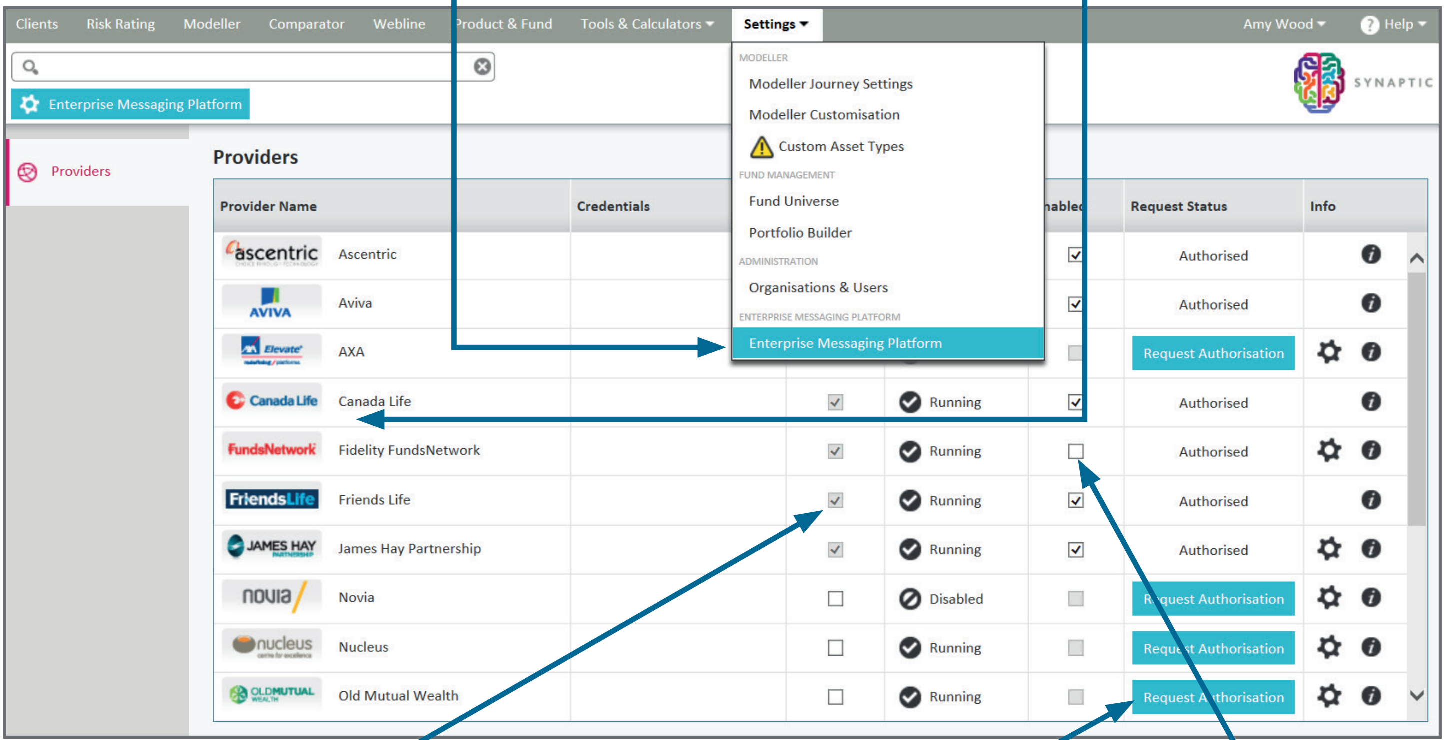
TECHNICAL SUPPORT
t: 0800 028 0033 e: support@synaptic.co.uk

SALES & CUSTOMER SERVICES
t: 0800 783 4477 e: customerservices@synaptic.co.uk

STEP 2.

1. Click here to get started – you will need to accept the terms and conditions before accessing the provider setup

2. Review the Synaptic Contract Enquiry Enterprise Messaging Platform guide for setup, each provider must be contacted before you can receive valuations



3. Once you have confirmation from the Provider, you will need to select the tick box

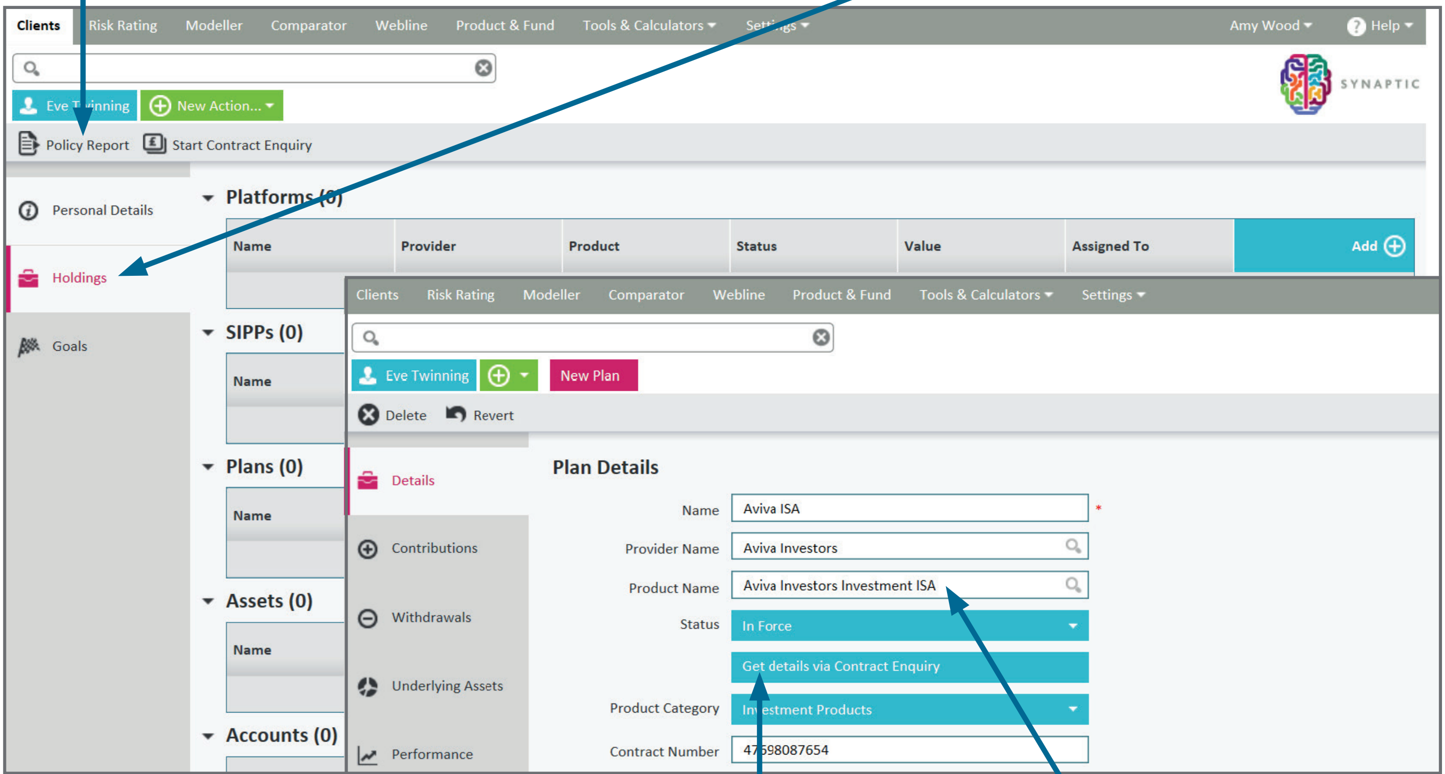
4. You can now 'Request Authorisation' this will send a task through to our Customer Services team. They will review the request and enable your account for your chosen Provider

5. Once the Customer Services team has enabled the Provider, you can tick the enabled box. You are now ready to add the provider logon details

STEP 3.

This report will give you an overview of all client holdings – great for annual reviews!

Your clients holdings can be added here – is it a SIPP or a plan? Make sure you have added the holding within the correct holding type



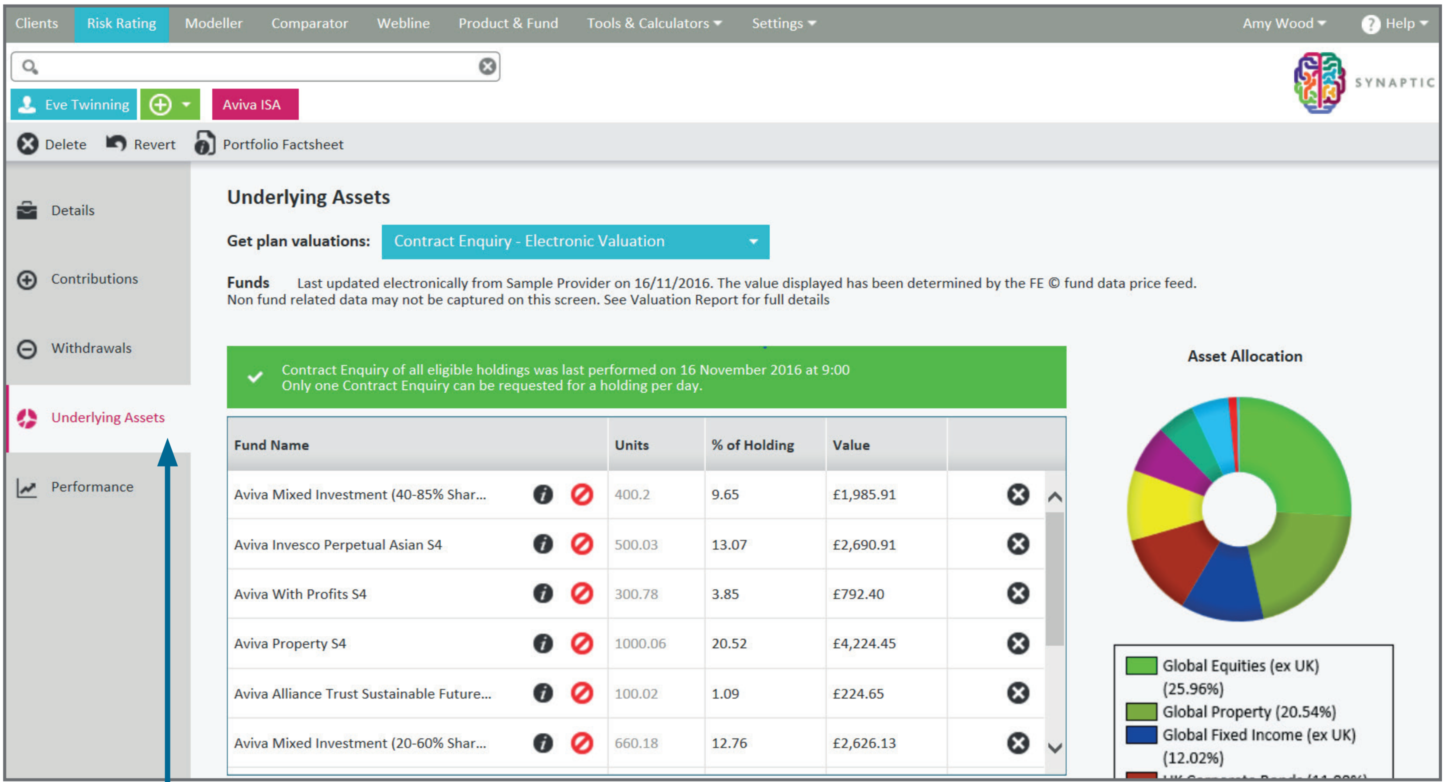
Once you have clicked ‘Get details via Contract Enquiry’ the system will then populate the underlying assets area on the left hand side with the provider valuation information

You will need to make sure you have the correct provider name, product name, status, product category and contract number.

TIP: Where you see a magnifying glass, there will be a list of products displayed once you begin to type.

STEP 4.

Results Screen



Valuation data returned by the Provider, can be found in the underlying assets area