SYNAPTIC PRODUCT & FUND

USER GUIDE

SYNAPTIC
**PRODUCT
& FUND**

Version 1.0

Contents

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.
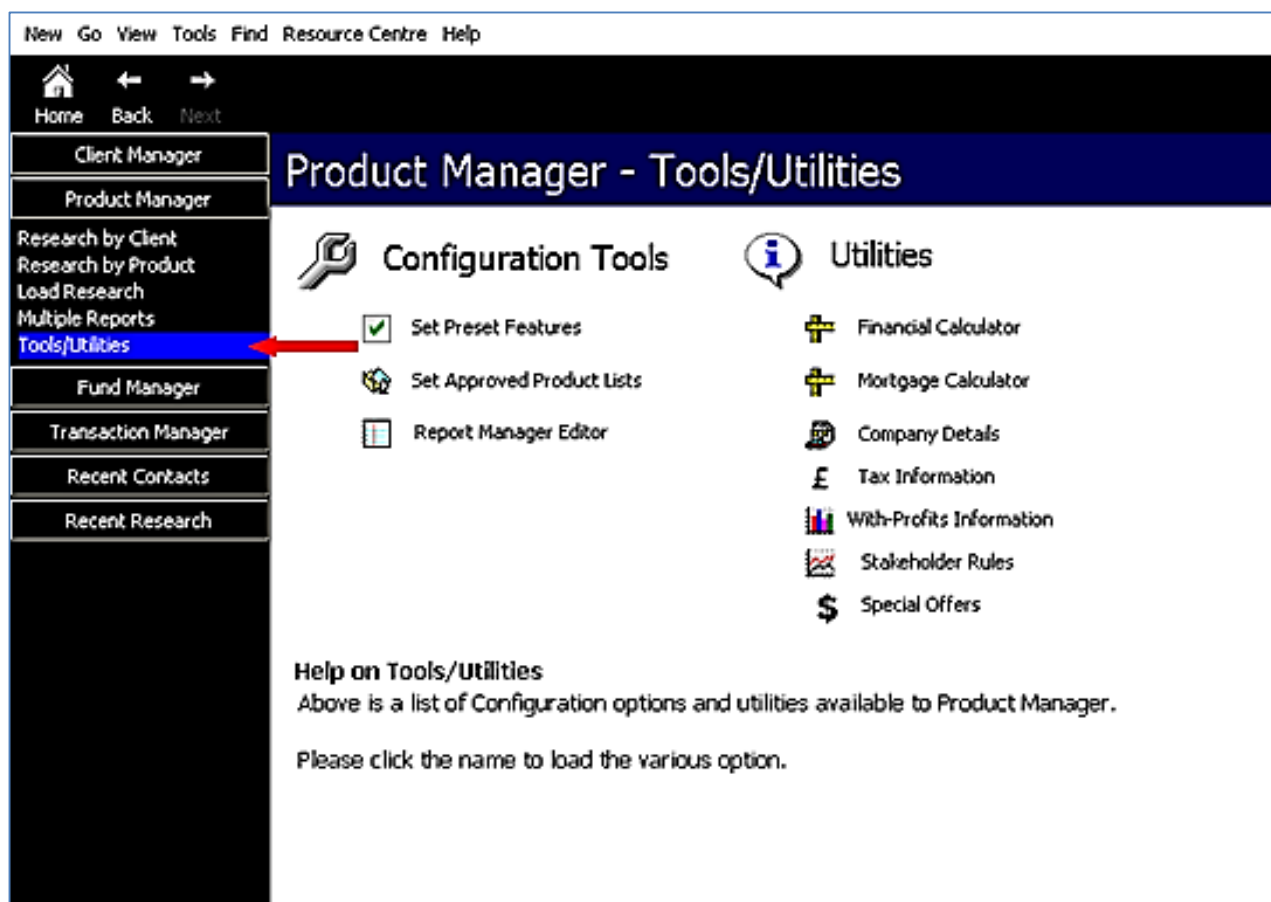
2. Report Editor

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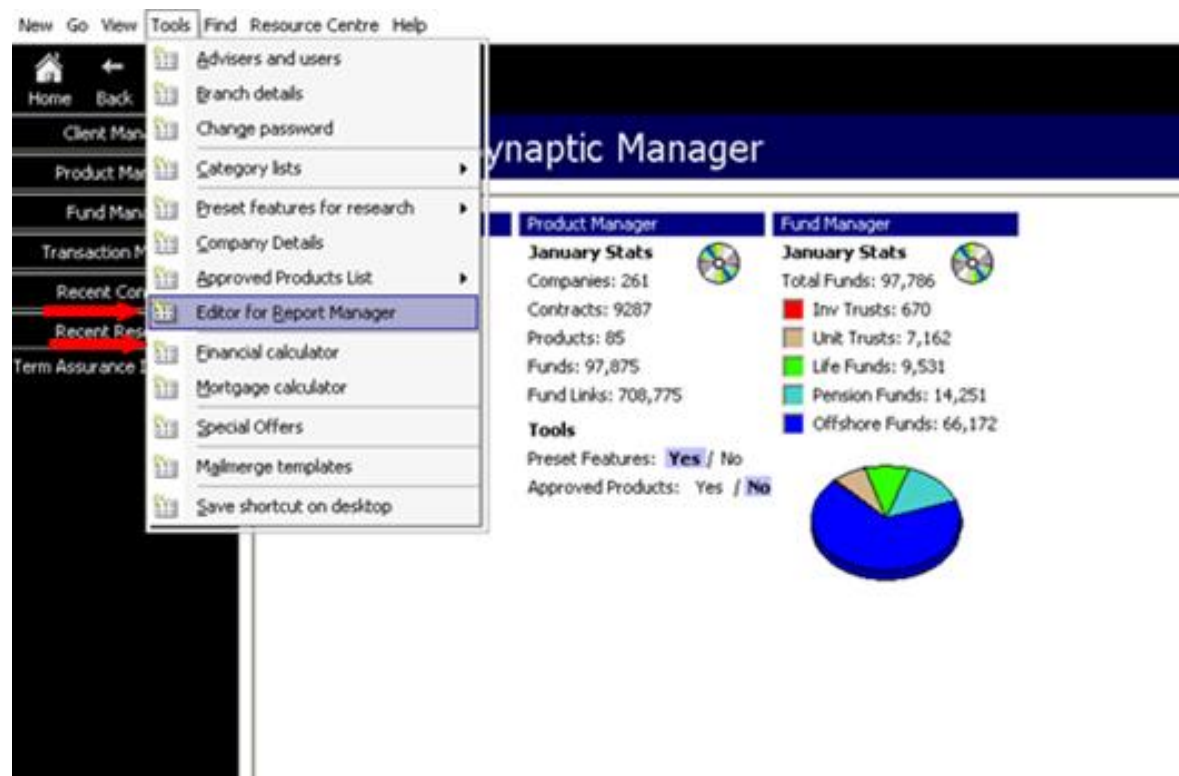
Accessing the Report Editor

Once Synaptic Manager has been signed into, there are two places where access to the Report Editor can be found:
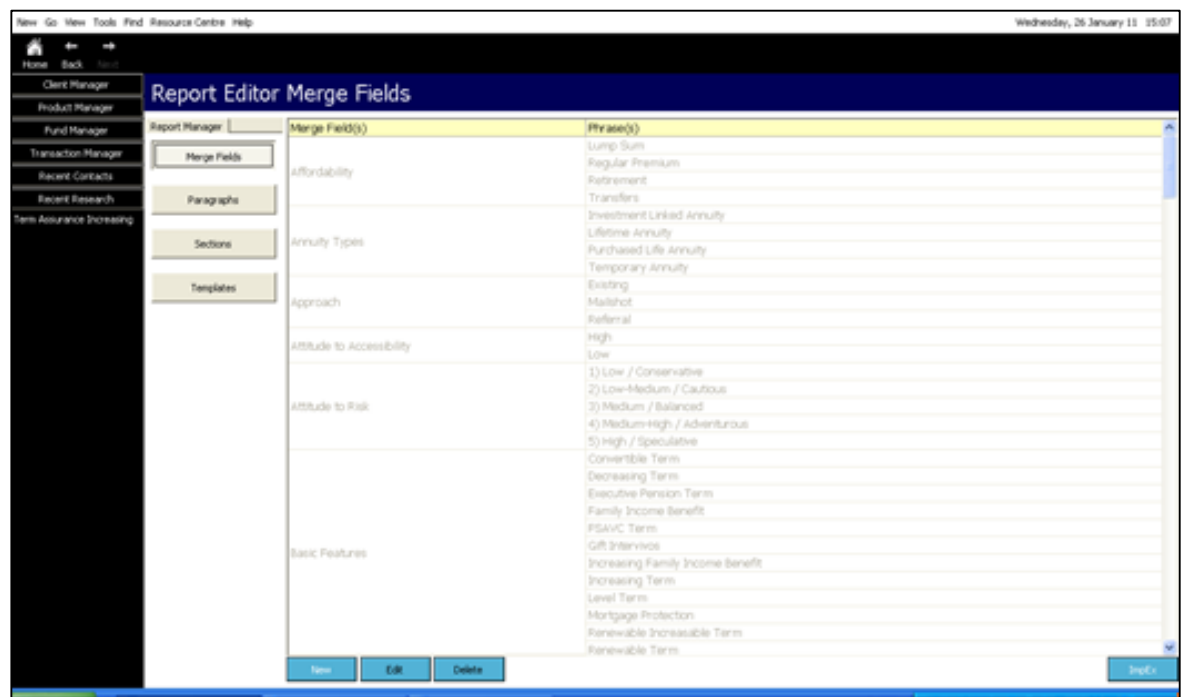
1. Within Product Manager in the menu

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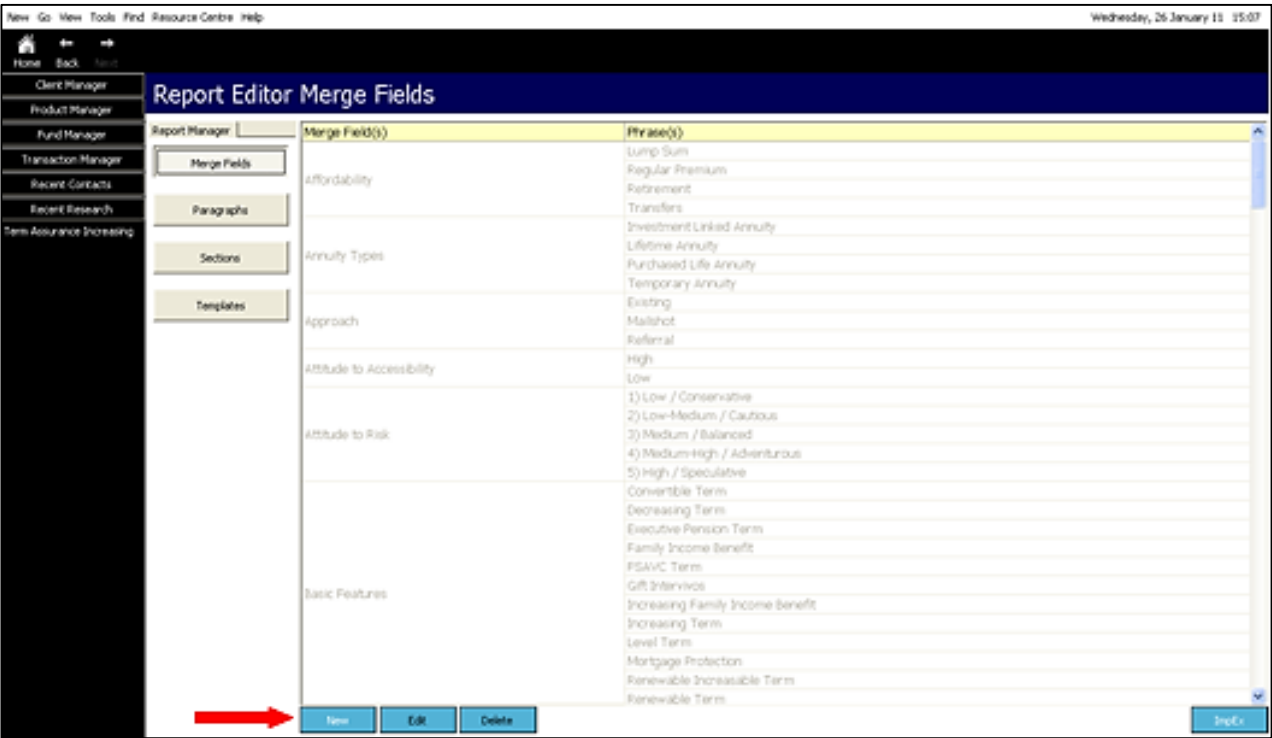
Once 'New' is clicked the following will be displayed:

Report Editor Merge Fields

Phrase Title

Allow Multiple Selection

Options

Complete the 'Phrase Title'.

If the Merge field will have more than one option, click into the 'Allow Multiple

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

Report Editor Merge Fields

Phrase Title

Where was the meeting?

☑ Allow Multiple Selection

Options

[+]

Clients home

at your home.

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

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

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

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

This Merge field can be edited and deleted.

Creating Merge Fields from an Existing Merge Field

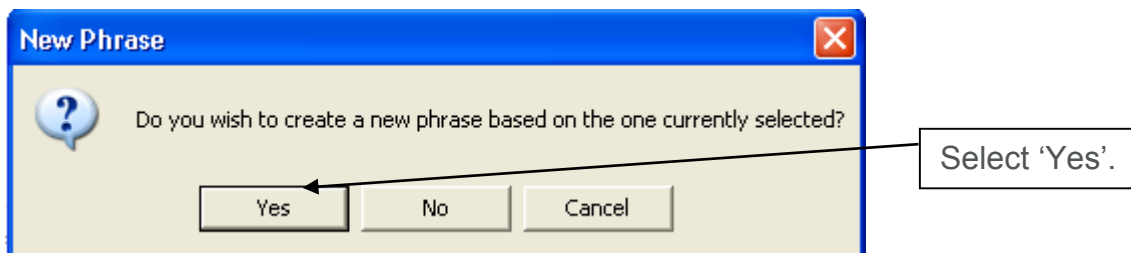In some cases, a new Merge field is required but it will have some options that another Merge field already has. In this case, the original Merge field can be used as a template for the new one.
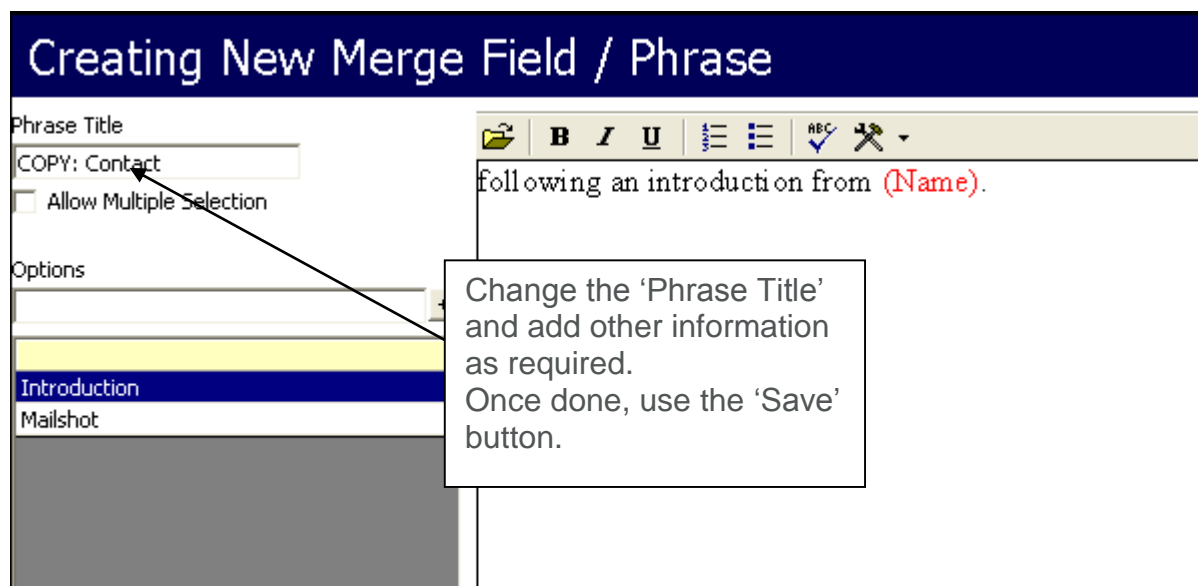
To do this, click onto the current Merge field that needs to be used and then select the 'New' button:

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:
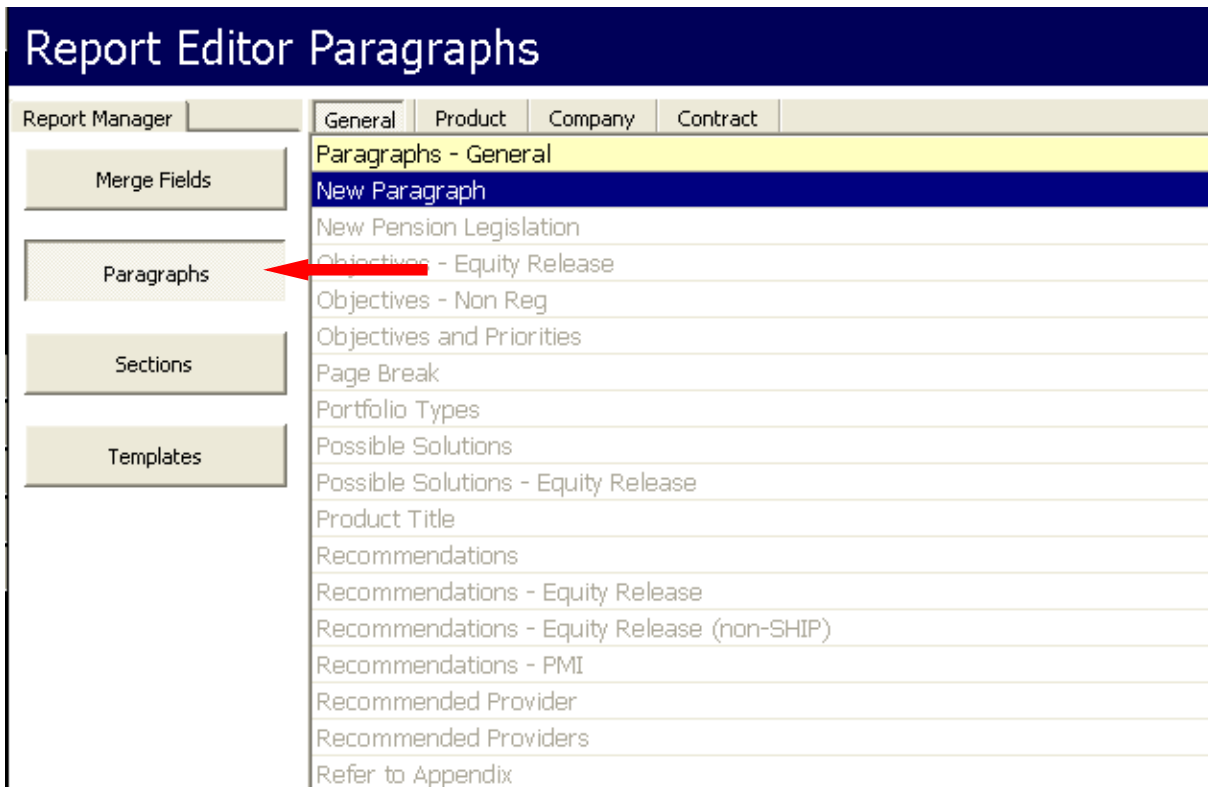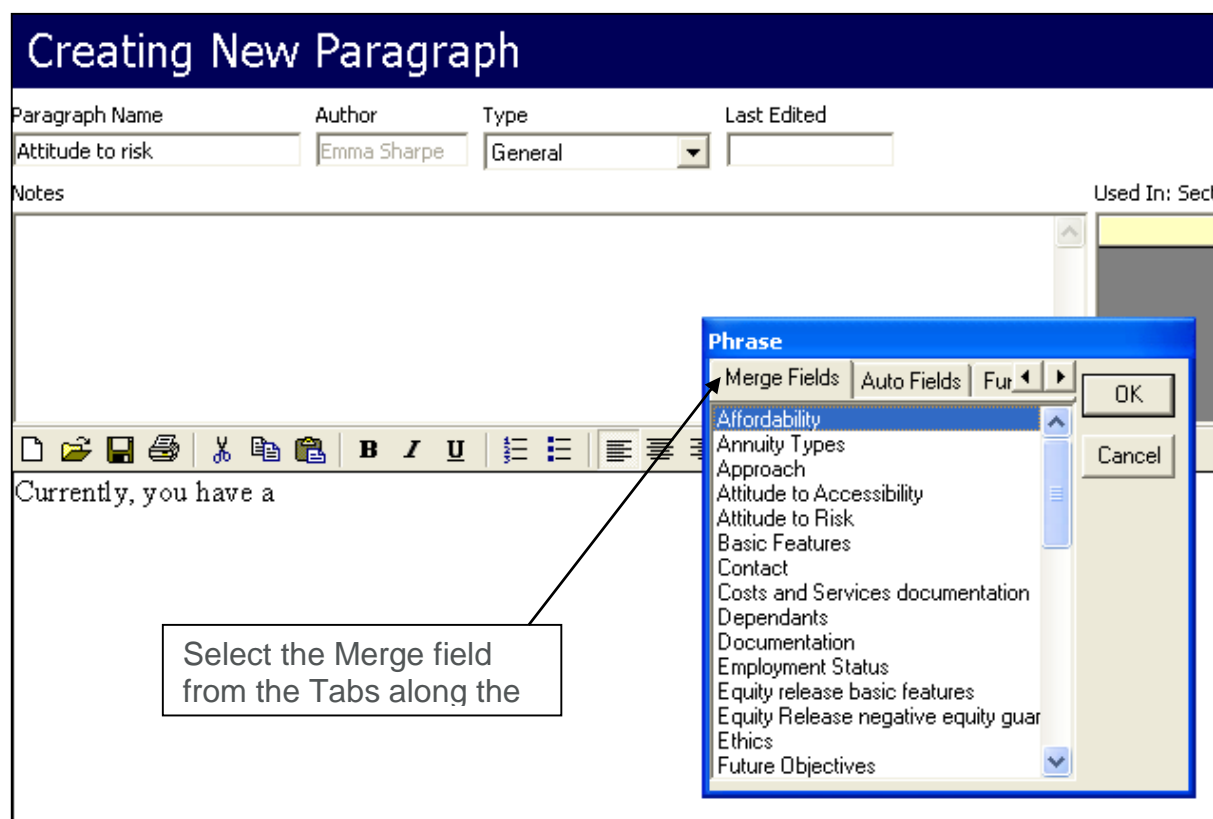

Within this section there are 4 tabs which represent the different sections that can be set up within a template. All of the Paragraphs in grey are owned by Synaptic and cannot be changed or deleted.

Adding a new Paragraph

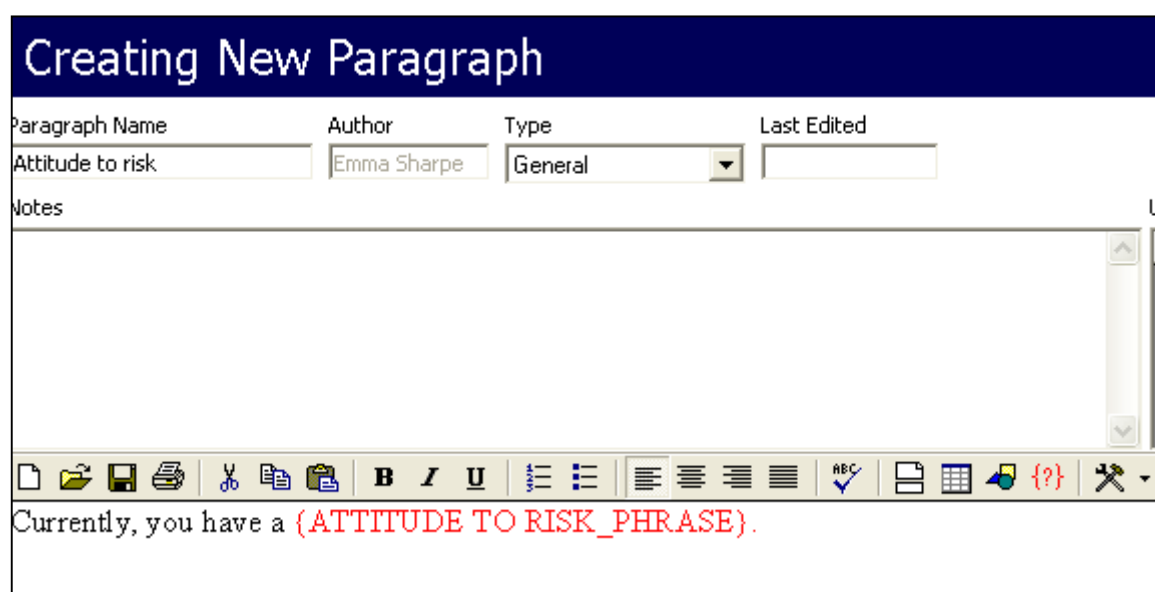Use the 'New' button to add a Paragraph:

The following page will be displayed:

Once the text has been added, use the 'Save' button at the bottom. The new Paragraph will then appear in the list in Black.

Adding a Paragraph with Merge Fields

If a Paragraph needs to be added which will contain one or more Merge fields, add the Paragraph as described in 2.4.1.

To add a Merge field into a Paragraph, use the {?} field on the menu bar. Once this button is clicked the following appears:

Creating New Paragraph

Paragraph Name	Author	Type	Last Edited
Attitude to risk	Emma Sharpe	General	

Notes

Used In: Sect

Phrase

Merge Fields | Auto Fields | Fur ◀ ▶

OK

Cancel

Affordability
Annuity Types
Approach
Attitude to Accessibility
Attitude to Risk
Basic Features
Contact
Costs and Services documentation
Dependants
Documentation
Employment Status
Equity release basic features
Equity Release negative equity guar
Ethics
Future Objectives

Currently, you have a

Select the Merge field from the Tabs along the

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.

Creating New Paragraph

Paragraph Name	Author	Type	Last Edited
Attitude to risk	Emma Sharpe	General	

Notes

U

Currently, you have a {ATTITUDE TO RISK_PHRASE}.

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':
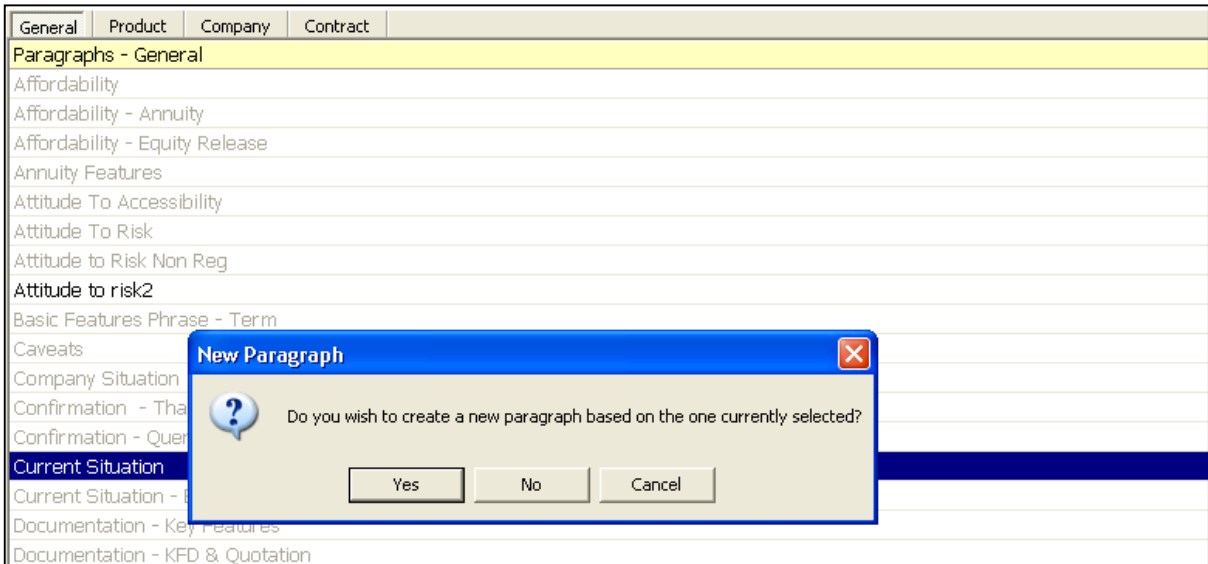
Select 'Yes' for this question.
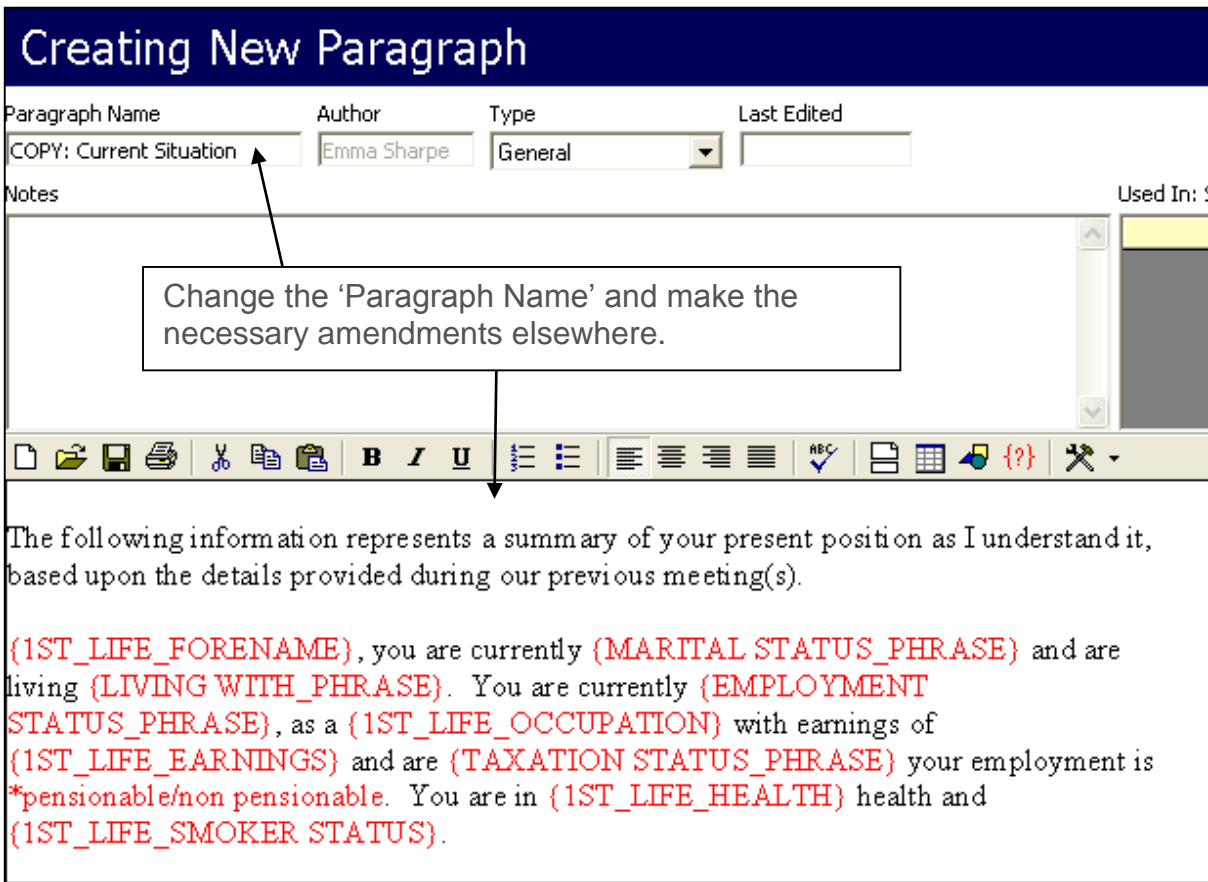
Once all the amendments have been made, use the 'Save' button. Your Paragraph will now be added to the list.

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:

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.

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

Once done, click the 'Save' button.

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:

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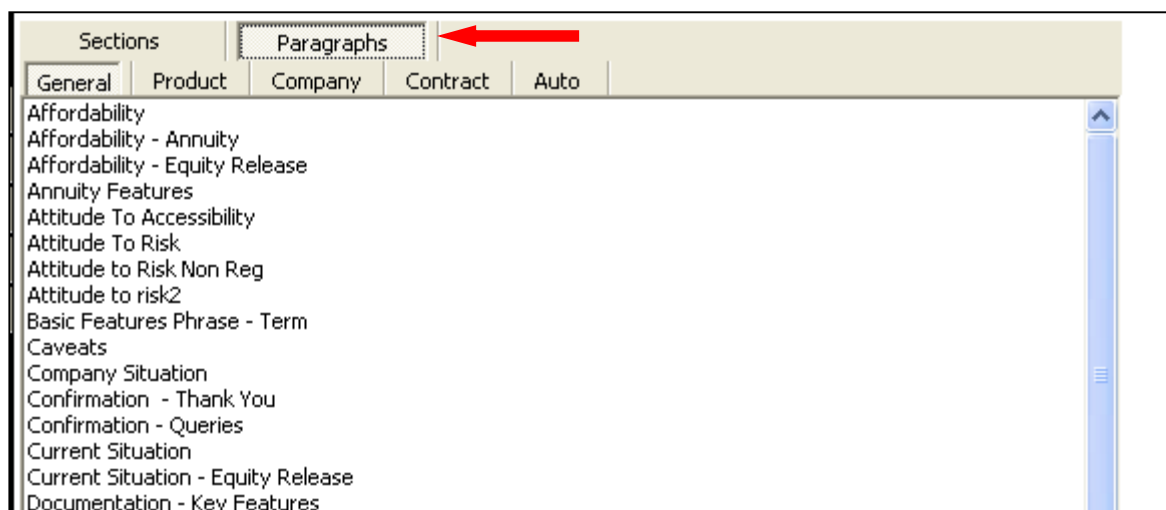
There will be standard Sections and Paragraphs that will be automatically included within a letter and there will be a number of optional Sections and Paragraphs that can be added.

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:

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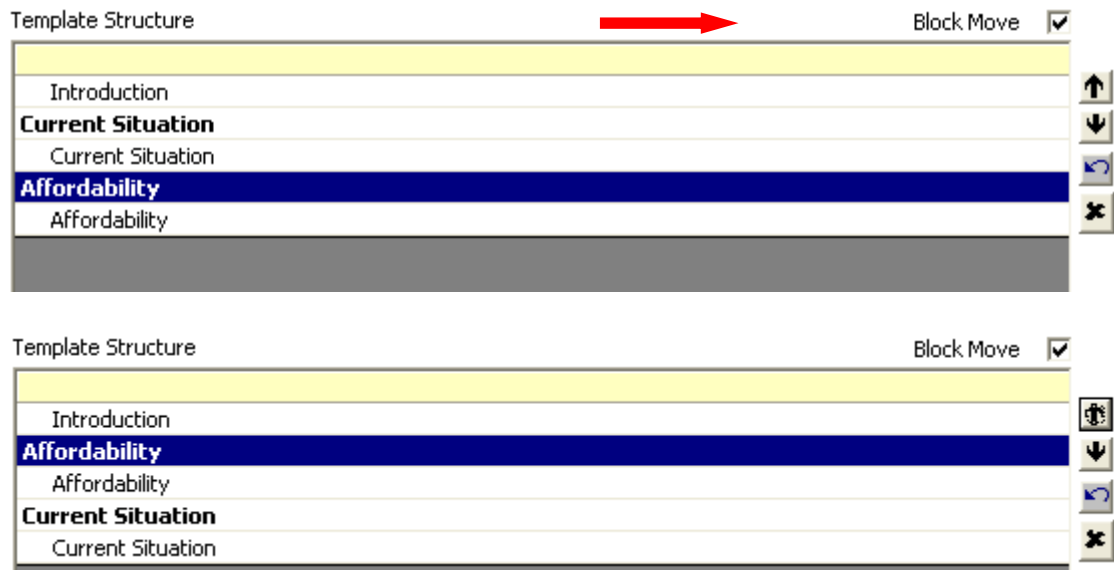
To delete a Section and Paragraph use the 'X' button and ensure that the 'Block Move' button is checked. A message will appear:
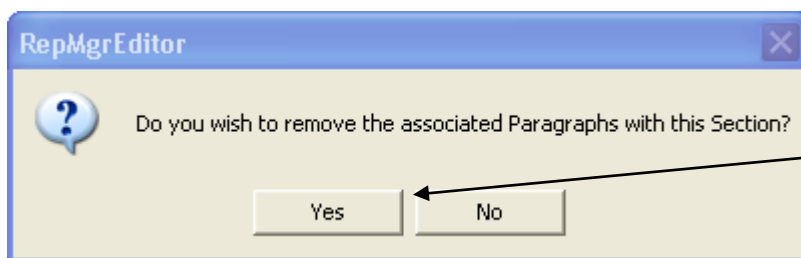
Answer as appropriate.

Once completed your Template should look like this:

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:

Select 'Yes'.
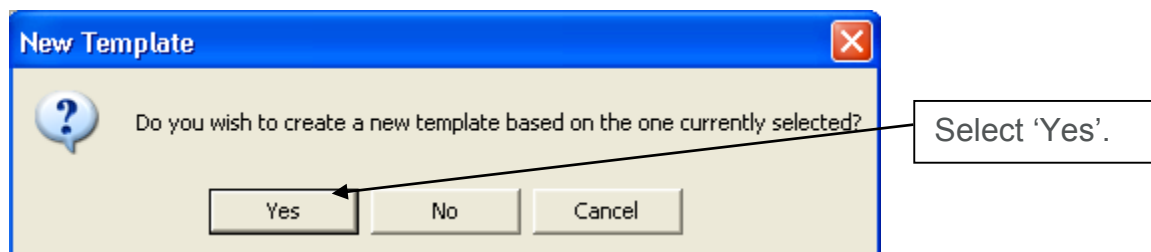
The existing Template will now be copied:

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 [x] 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:
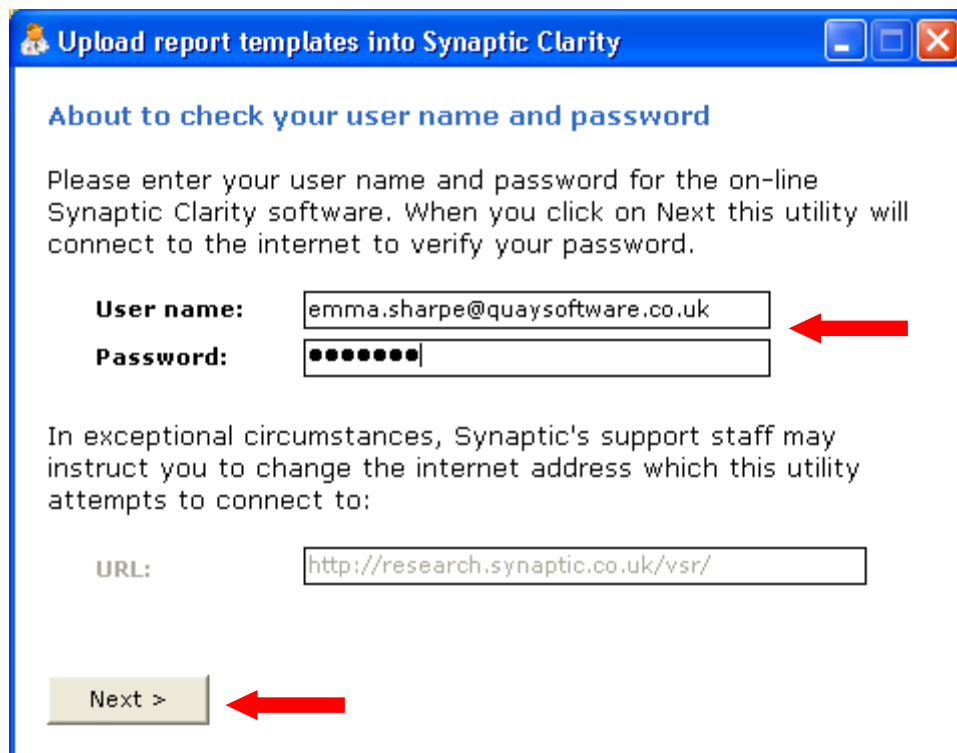
Once this icon has been clicked, the following will be displayed:
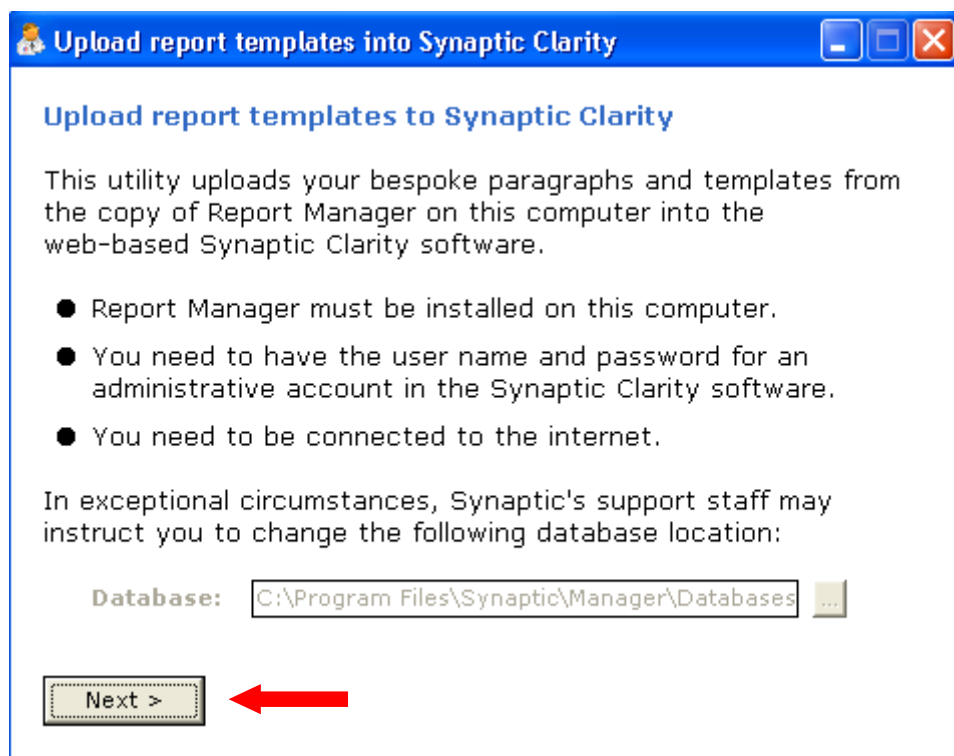
The location of the database will be "C:\program files\Synaptic\Manager\Databases\report.mdb" and this should already be shown in the 'Database' field.

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.
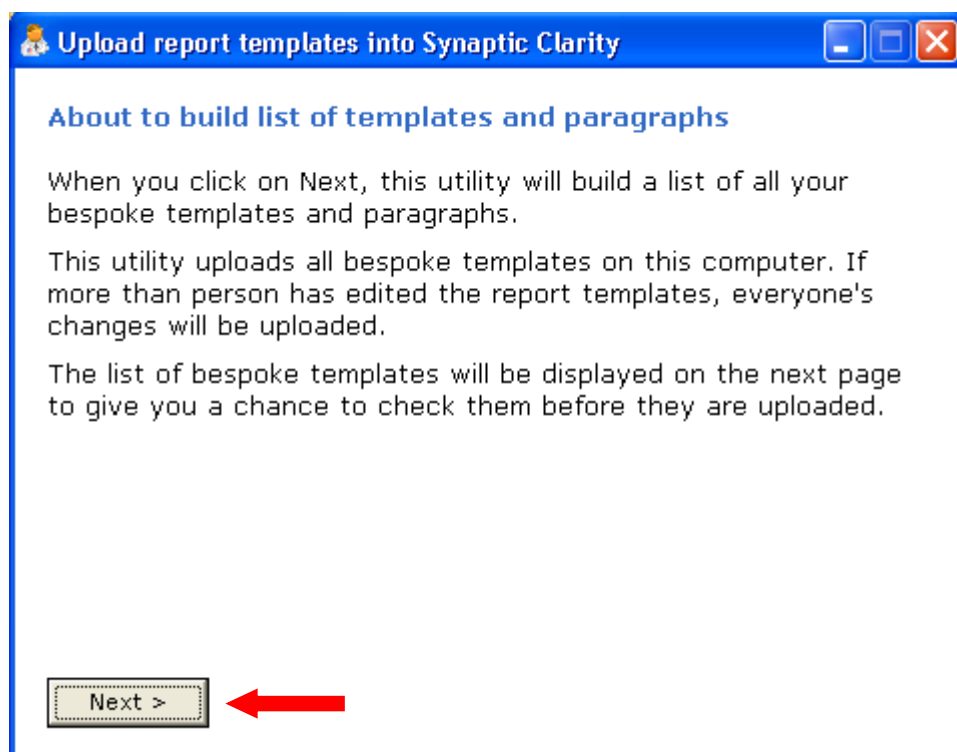
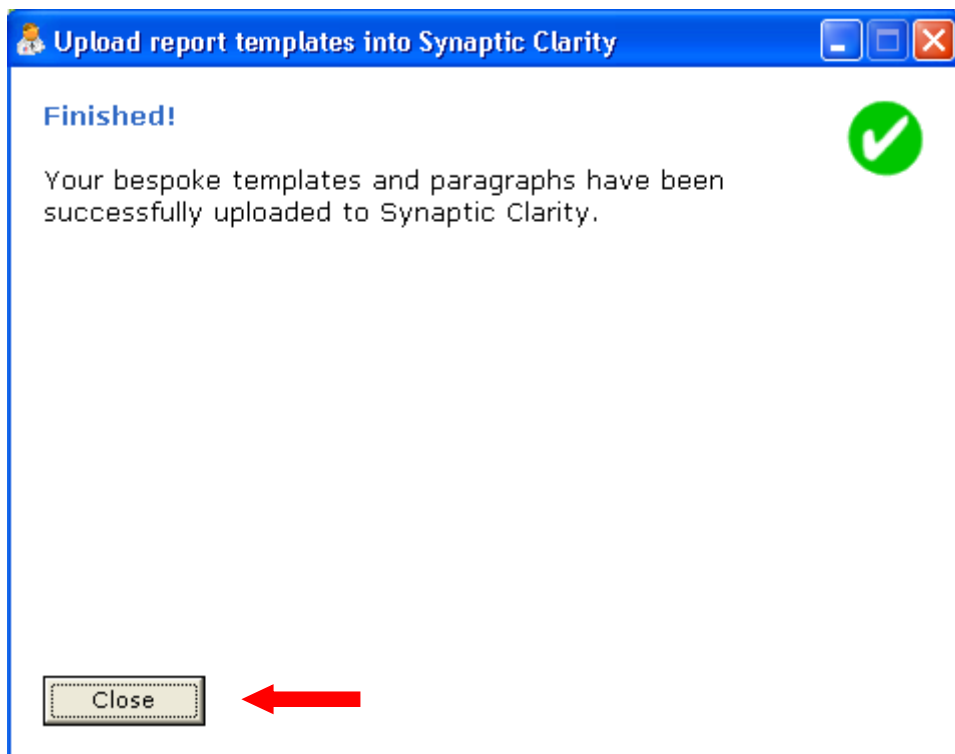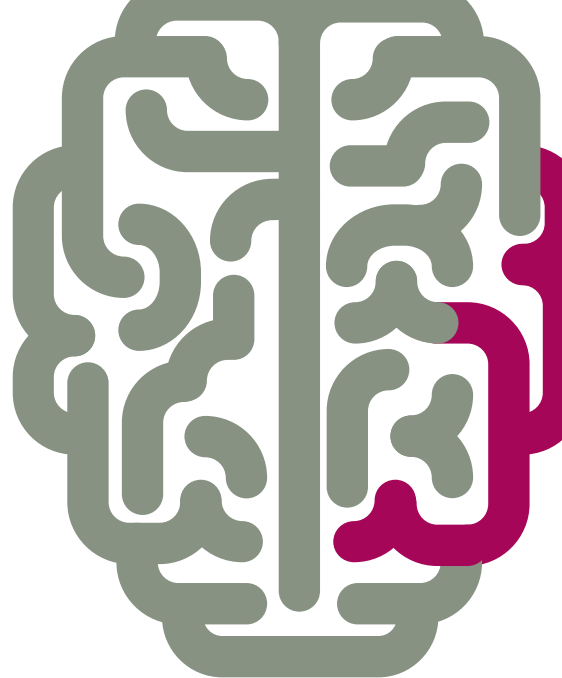Click 'Next' at the next screen.

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.
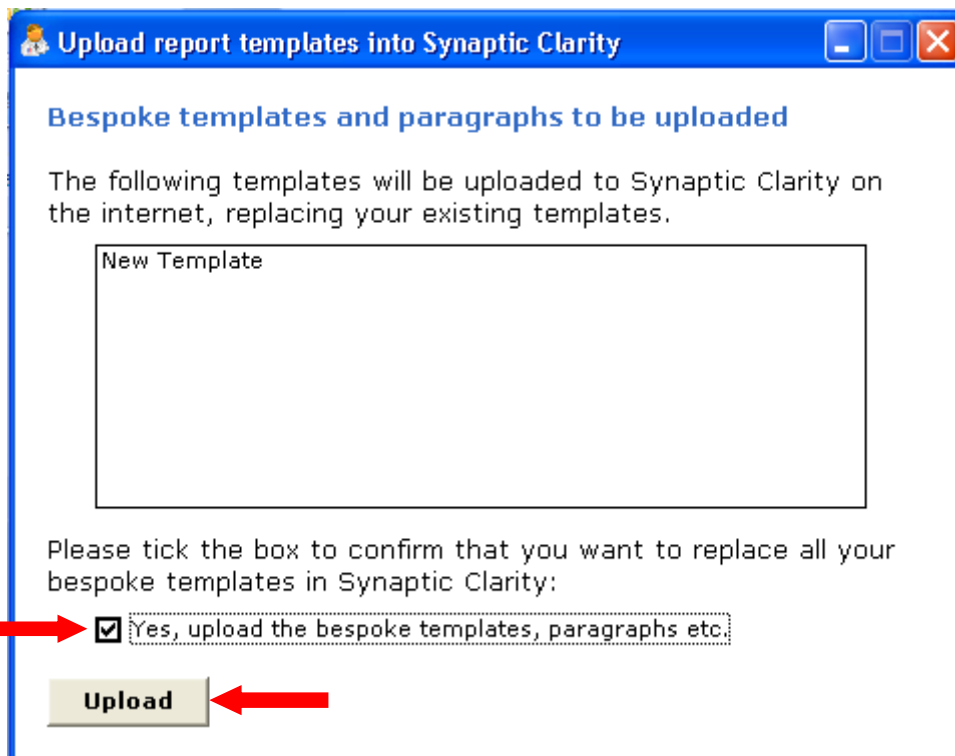
Click 'Close'.

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