Generating a suitability report

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Once you have created a ranking system which matches the client's requirements, click on the **Report** tool above the ranking results, below the page's title. This displays the screen illustrated by the first screenshot.

80	SWAFTER Individual Savings				s Accounts	
Choos	e a report template		Fund picker 🍕 Back to ranking	4 Back to filtering	Help	
1. Ch	oose the contract you are recommending (if any)					
-	(No recommendation)			-	~	
1	Novia Novia Stocks & Shares ISA			33.4 pts		
2=	AXA Elevate Elevate Stocks & Shares ISA - Explicit			27.2 pts	7.2 pts 7.2 pts	
2=	Seven Investment Management ISA (Stocks and Shares)			27.2 pts		
4	Nucleus Nucleus ISA account		25.6 pts			
5=	Zurich Intermediary Platform Zurich Intermediary Platform - Cash ISA Account			24.1 pts		
5=	Zurich Intermediary Platform Zurich Intermediary Platform Stocks and Shares ISA Account			24.1 pts		
7	Standard Life Assurance Ltd Wrap ISA			10.0 pts	~	
	Standard Life Accurance Ltd Standard Life FundZone ISA			e 9 otr	_	
2. Clic	ck on a report template lick reports (open in your browser) and research report	Report Manager sui	itability reports (download	as RTF)		
Facts	heet for the selected contract	Standard Report - ISA				

The first step is to pick the contract you are recommending to the client. In the example screenshot, the top-ranked contract has been selected.

Depending on the modules of the software which your firm has bought, you then have access to two different types of report: Quick Reports, and Report Manager suitability reports.

Quick Reports

Quick Reports open in your web browser, can be saved in PDF form, but only have basic wordprocessing facilities because of the technological limits of web browsers.

The second screenshot shows an example of opening a Quick Report, and then using the Edit report tool to display the simple word-processing functionality.

STANTIE		Individual Savings Accounts, ISA				
Report Save as POF Finish editing 9 Back to report selection 9 Back to ranking 9						
(Font) V (Font size) V B		-				
	Product res	search	^			
	Prepared by					
Synaptic Software Limited - Training						
	Individual Savin ISA	gs Accounts				
The recommended contract is:	Novia Novia Stocks & Shares ISA		_			
The contracts which meet the cri below.	teria for inclusion in this report are as foll	ows. The list is in ranked order, using the ranking s	ystem show			
Company	Product name	Score				
1 Novia	Novia Stocks & Shares ISA	33.4				
2= AXA Elevate	Elevate Stocks & Shares ISA - Explicit	27.2				
2= Seven Investment Management	ISA (Stocks and Shares)	27.2	~			
4 Nucleus	Nucleus ISA account	25.6				

Report Manager suitability reports

Report Manager suitability reports generate documents which are downloaded into Microsoft

Word, rather than being opened in your web browser. The screenshot below shows the result of clicking on one of the Report Manager templates.



Synaptic supplies a number of default templates – primarily, a short report which is designed to be used as an appendix explaining the basis on which the recommended contract was selected, and a full template for a complete suitability report covering affordability, reviews etc.

Customers can create their own Report Manager templates and upload them into the system – this topic is covered in detail in the User Guide.