

What is the difference between Quick reports and Suitability reports?

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The final stage in the client-focused research process is to generate documentation for the client explaining which contract you are recommending, and why.

N.B. Don't forget that the system can be used to generate many other types of "report" – grids of contract data, factsheets, comparisons of specific products etc.

You get to the reporting stage by clicking the **Report** link on the menu bar in either the filtering or the ranking stages. The resulting page is illustrated by the screenshot below:

The screenshot displays the 'Individual Savings Accounts' reporting interface. At the top, there is a navigation bar with 'Choose a report template', 'Fund picker', 'Back to ranking', 'Back to filtering', and 'Help'. Below this, the first section is titled '1. Choose the contract you are recommending (if any)'. It shows a list of contracts with their respective points:

Rank	Contract Name	Points
-	(No recommendation)	-
1	Novia Novia Stocks & Shares ISA	33.4 pts
2=	AXA Elevate Elevate Stocks & Shares ISA - Explicit	27.2 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
8	Standard Life Assurance Ltd Standard Life FundZone ISA	6.9 pts

The second section is titled '2. Click on a report template'. It offers two main options:

- Quick reports** (open in your browser):
 - Standard research report
 - Factsheet for the selected contract
- Report Manager suitability reports** (download as RTF):
 - Research Report
 - Standard Report - ISA

Choosing a contract In the top half of the screen you choose the contract you are recommending simply by clicking on it – though you can also say “no recommendation” in order to generate a document which describes your research without proposing a specific product. The list of contracts is displayed in ranked order if you have created a ranking scheme. If you have come straight from filtering to the reporting stage, without defining a ranking system, then the contracts are simply displayed in alphabetical order.

Choosing a report

The bottom half of the screen, as illustrated by the screenshot above, is for choosing the report template you want to use.

There are two types of report which can be generated, both of which are discussed in detail below. The list of templates available to your firm may differ from the list illustrated in the screenshot, and your firm will not see the right-hand list at all if you have not paid for the system's full suitability report functionality.

Report type

Contents and purpose

Quick Reports

Quick Reports are opened inside your web browser, and have limited word-processing capabilities (because of the technological limitations on what can be provided through a web browser). Quick Reports can either be printed or saved in PDF form.

Report Manager suitability reports

Report Manager suitability reports are documents which are downloaded for editing on your computer, in Microsoft Word or similar software.

Storage of reports

Reports that you generate are **not stored in the system** (because they can be regenerated at any time). If you want to keep a copy of a Quick Report, save it in PDF form. Suitability reports are downloaded for editing on your computer, and therefore you automatically have a copy.

N.B. If your back-office software has been integrated with Synaptic Research, all Quick Reports and suitability reports that you generate can automatically be stored in the back-office system's document management.

List of recommended funds

If you want your reports to include a list of the funds you are recommending on the selected contract, use the Fund Picker link on the menu bar of the report selection page.

This link is highlighted in the screenshot below.

The screenshot displays the 'Individual Savings Accounts' (ISA) report selection interface. At the top, the Synaptic Software logo is visible on the left, and the title 'Individual Savings Accounts' is centered. Below the title, there is a navigation bar with a 'Fund picker' link highlighted in red. The main content area is divided into two sections. The first section, '1. Choose the contract you are recommending (if any)', shows a list of funds with their respective scores. The second section, '2. Click on a report template', offers two options: 'Quick reports' and 'Report Manager suitability reports'.

Rank	Fund Name	Score
-	(No recommendation)	-
1	Novia Novia Stocks & Shares ISA	33.4 pts
2=	AXA Elevate Elevate Stocks & Shares ISA - Explicit	27.2 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
8	Standard Life Assurance Ltd Standard Life FundZone ISA	6.9 pts

This tool shows all the linked funds on the selected contract, and helps you to choose which ones you are recommending. The list of funds can then be saved so that it appears in reports.