

# 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.

**Individual Savings Accounts** ISA

Choose a report template | Fund picker | Back to ranking | Back to filtering | Help

1. Choose the contract you are recommending (if any)

-	{No recommendation}	-
1	<b>Novia Novia Stocks &amp; Shares ISA</b>	<b>33.4 pts</b>
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	5.9 pts

2. Click on a report template

<input type="checkbox"/> <b>Quick reports</b> (open in your browser) Standard research report Factsheet for the selected contract	<input checked="" type="checkbox"/> <b>Report Manager suitability reports</b> (download as RTF) Research Report Standard Report - ISA
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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 word-processing 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.



## Individual Savings Accounts, ISA

Report | Save as PDF | Finish editing | Back to report selection | Back to ranking | Back to filtering | Help

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### Product research

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### Individual Savings Accounts ISA

The recommended contract is: **Novia Novia Stocks & Shares ISA**

The contracts which meet the criteria for inclusion in this report are as follows. The list is in ranked order, using the ranking system show below.

Company	Product name	Score	
1 Novia	Novia Stocks & Shares ISA	33.4	<div style="width: 33.4%;"></div>
2= AXA Elevate	Elevate Stocks & Shares ISA - Explicit	27.2	<div style="width: 27.2%;"></div>
2= Seven Investment Management	ISA (Stocks and Shares)	27.2	<div style="width: 27.2%;"></div>
4 Nucleus	Nucleus ISA account	25.6	<div style="width: 25.6%;"></div>

### 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.



## Individual Savings Accounts, ISA

Enter report information | Back to report selection | Back to ranking | Back to filtering | Help

(This report does not contain any fields which need to be completed manually. You can simply click on the button below to generate the report, and download it onto your computer.)

If you are using Word 97 or lower please click here

Create report

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.