

Can I create bespoke Report Manager Suitability report templates?

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If your firm has paid for the additional functionality, bespoke templates can be created using a copy of Synaptic's Report Manager Software. The templates are then uploaded from the desktop into Synaptic Research.

Multiple templates can be created for single products. This is particularly valuable for streamlining the report writing process, by accommodating various different client scenarios. For example, you could create a selection of pension templates, based on different attitudes to risk or different terms to retirement. Large sections of these templates would be identical, but the sections about attitude to risk, or caveats would be quite different. This approach removes the requirement for the adviser to manually edit these sections and also allows a compliance department to implement standard wording across the entire firm.

N.B. Templates apply to all a firm's users, and therefore only system administrators are allowed to upload changes.
