CENTRA

USER GUIDE:

Multi Product Suitability Reports

SimplyBiz *Investment Services*

One of the new updates in Centra will now you allow you to create one suitability report to give to the client when recommending multiple products. The new streamlined suitability report process allows you to shorten down the report writing process for more than one product.

This Guide will provide you with the information you need on how to use the Multi Product Suitability Report functionality in CENTRA.

We have different User Guides which will assist you in learning about and using the various aspects of Centra. These can be found on the SimplyBiz Investment Services website.

You can also attend Webinars and Workshops, contact the SimplyBiz Investment Services Helpdesk or liaise with the Business Consultancy Team to incorporate Centra into your Centralised Investment Proposition.
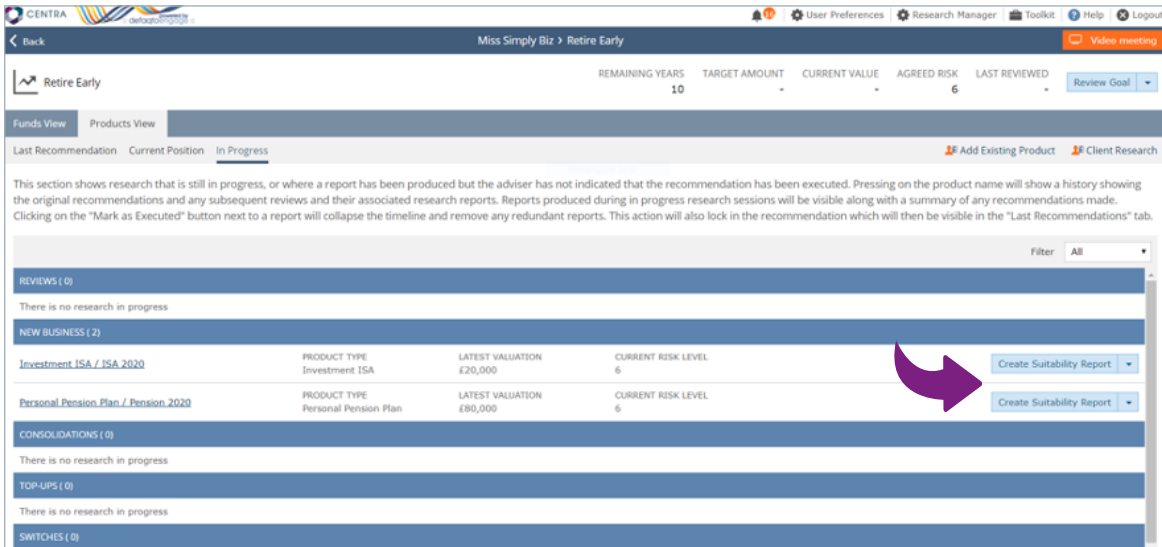
For more information please call **0808 124 0000** or email **investmentservices@simplybiz.co.uk**

Please be aware that these documents may change from time to time and therefore the screen shots used may differ to what's shown within the Tool.

Multi Product Suitability Report

This new release into the system will allow for the streamlining of the suitability report writing process. This will allow for multiple suitability reports to be combined to shorten down the process of reviewing and writing suitability reports for more than one product at a time.
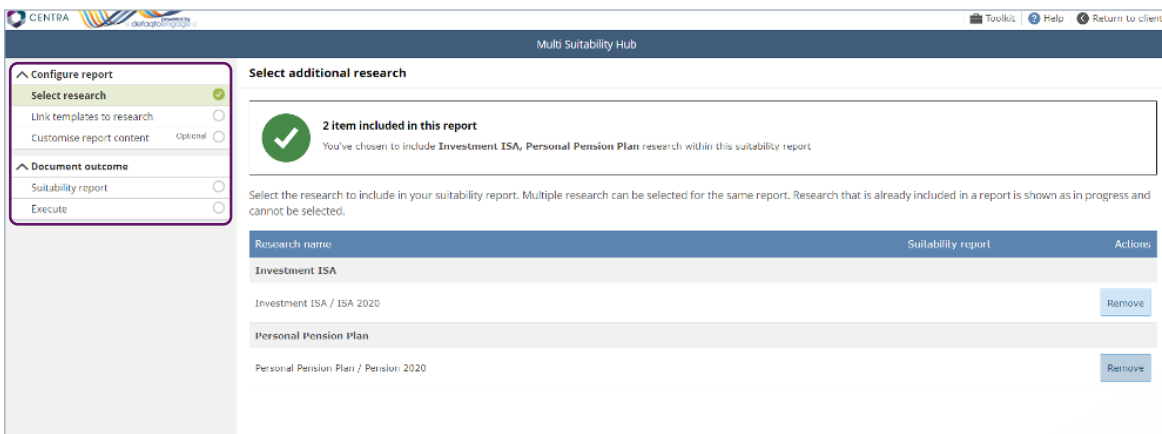
Choose **Create Suitability Report**.

The Multi-Product Suitability Report builder is a hub-based system. The left-hand side of the screen has all steps which you need to work through, and will track your progress.

To configure your report, select which research areas you would like to include in your suitability report by clicking the "**Add**" or "**Remove**" buttons.
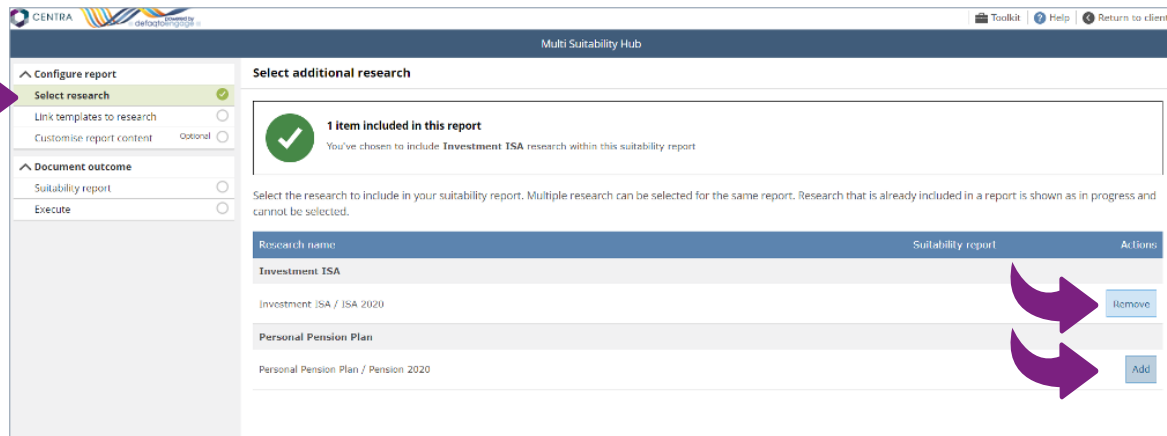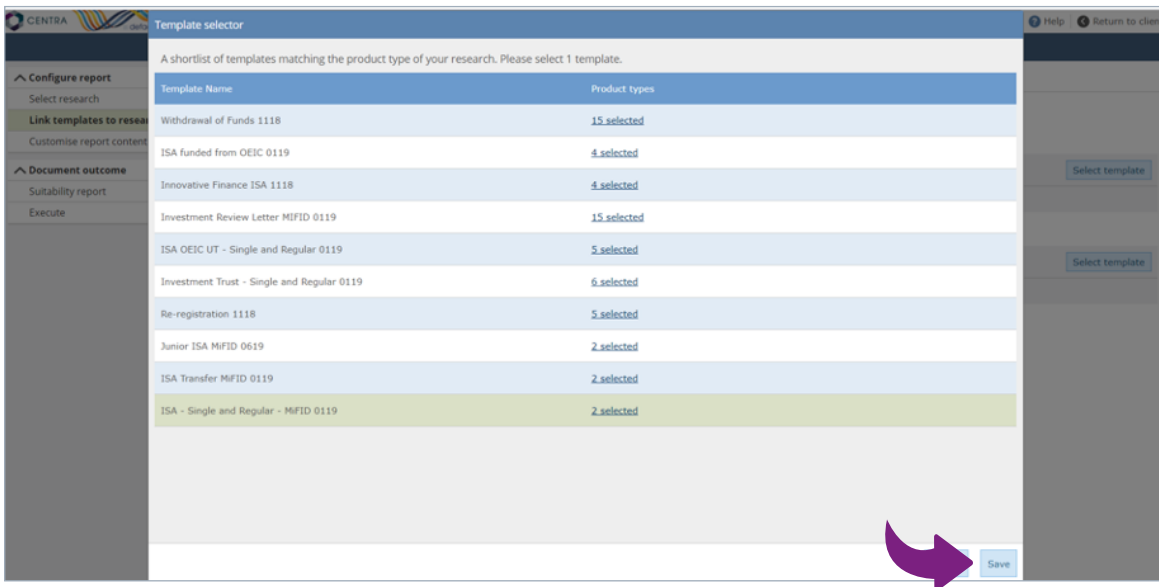

Once your research recommendations have been added, click **Link Templates to Research** down the left. Now **Select the appropriate templates** to include.

For advice on which templates to use or any other compliance support please contact the Compliance Helpdesk on 01484 439120.
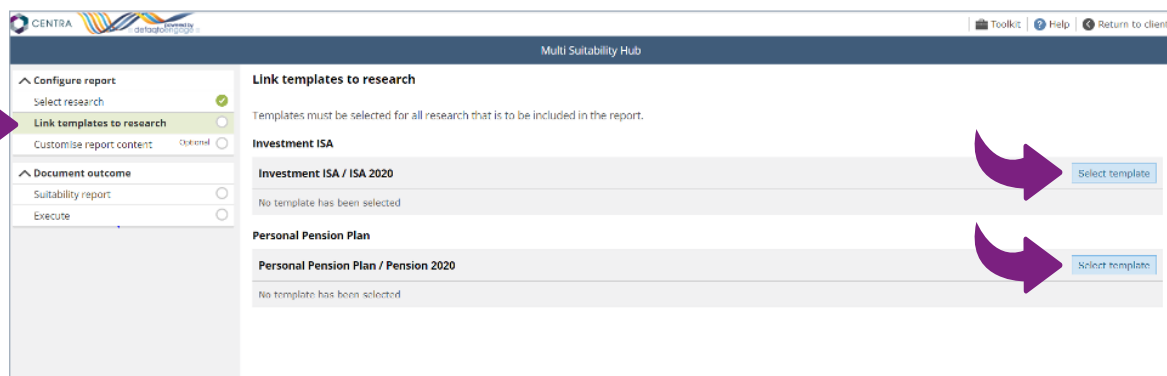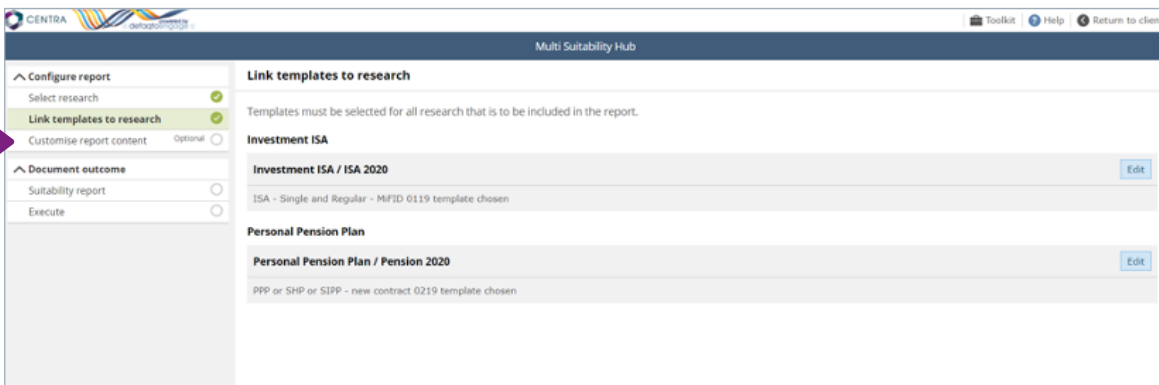
Once you have chosen your template for each research area, click **Save** to move on.

Customise Report Content is an optional section. This will allow you to customise which sections are included in your suitability report, to avoid duplication

To exclude a section simply uncheck the green box to the left of that section name. You can control the order in which your recommendations are shown in the report by using the up/down arrows.
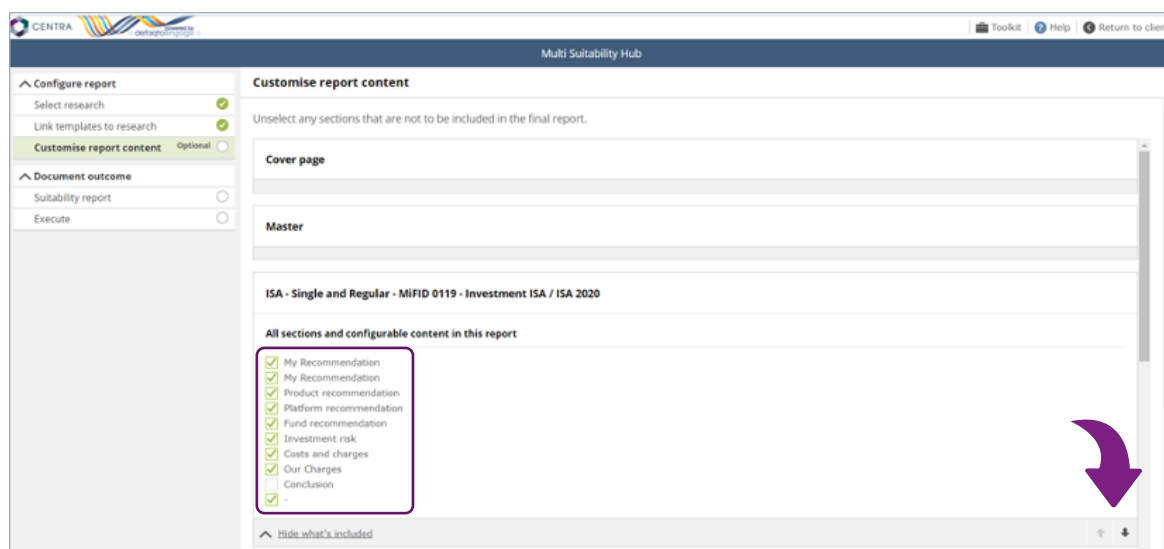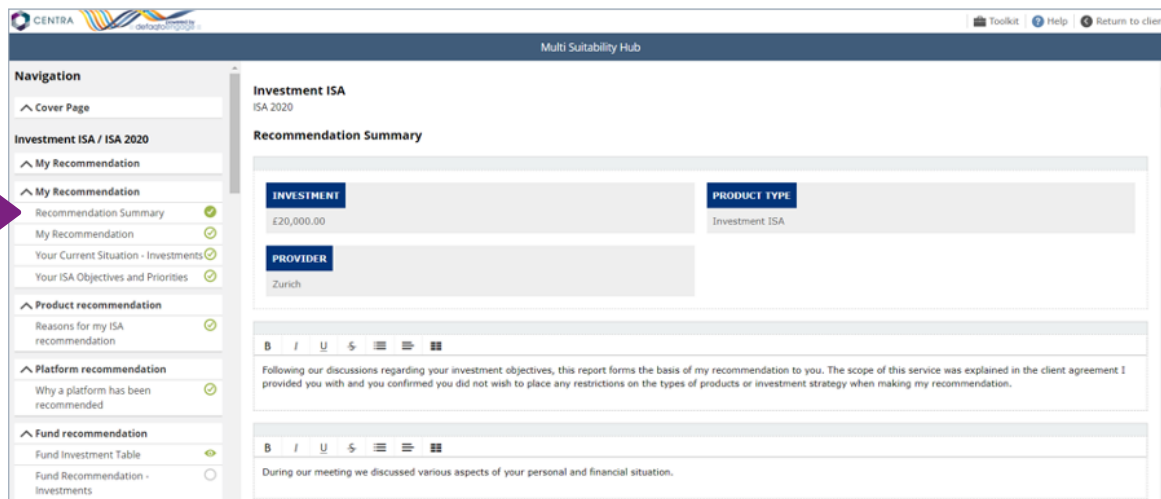

Once you are happy with the content, it is now time to create your report. Click **Suitability Report** down the left. Click **Create Report** to pull all the sections of the report together
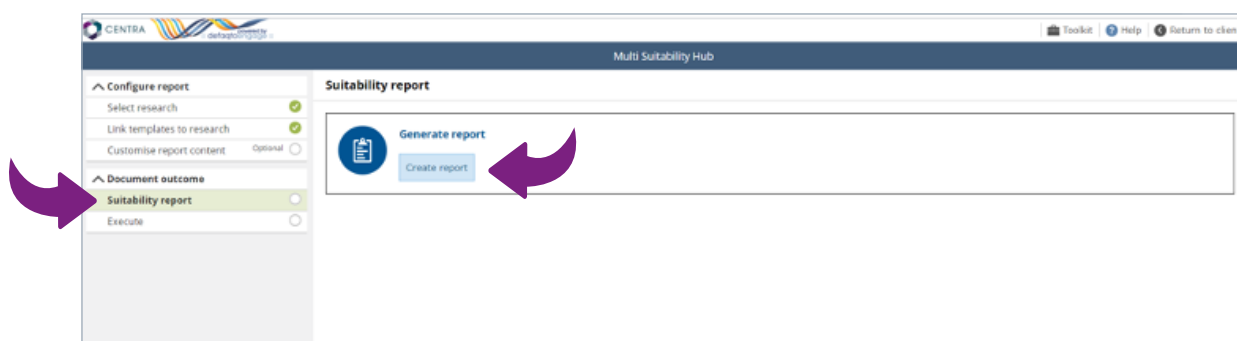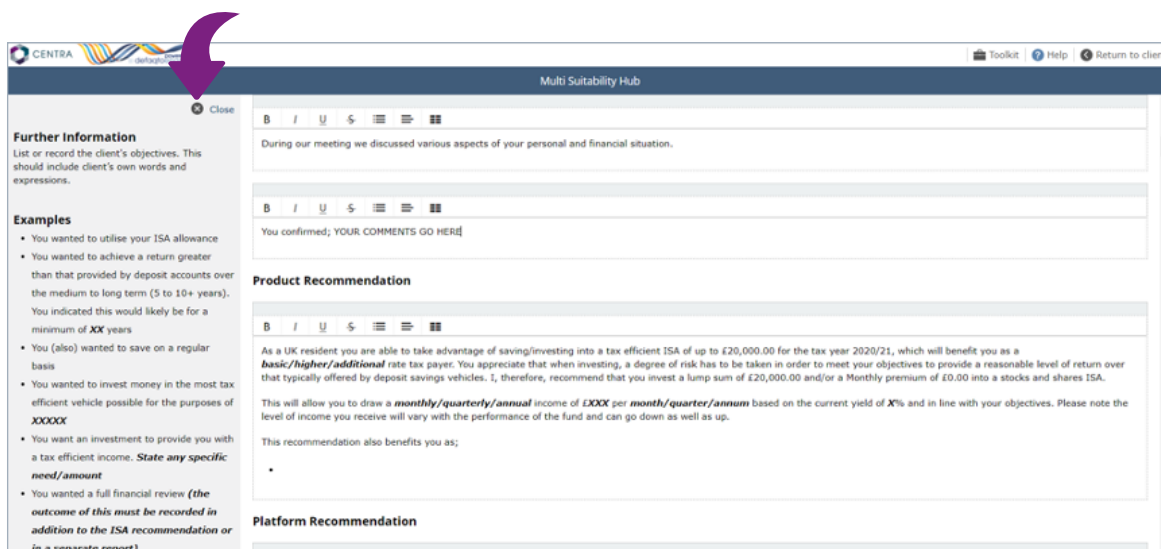

This is your report builder. The left-hand side of the screen will show all the sections you need to work through to complete your suitability report. The right-hand side will show a section looks like.

The **Navigation** menu will show various symbols. A green circle with a tick symbol ✓ means that the section is complete. Anything with an image of an eye 👁 refers to that section being locked and cannot be amended in the wizard. Some sections have an open circle ◯ or an open circle with a tick ⊙ to read and complete the actions required.
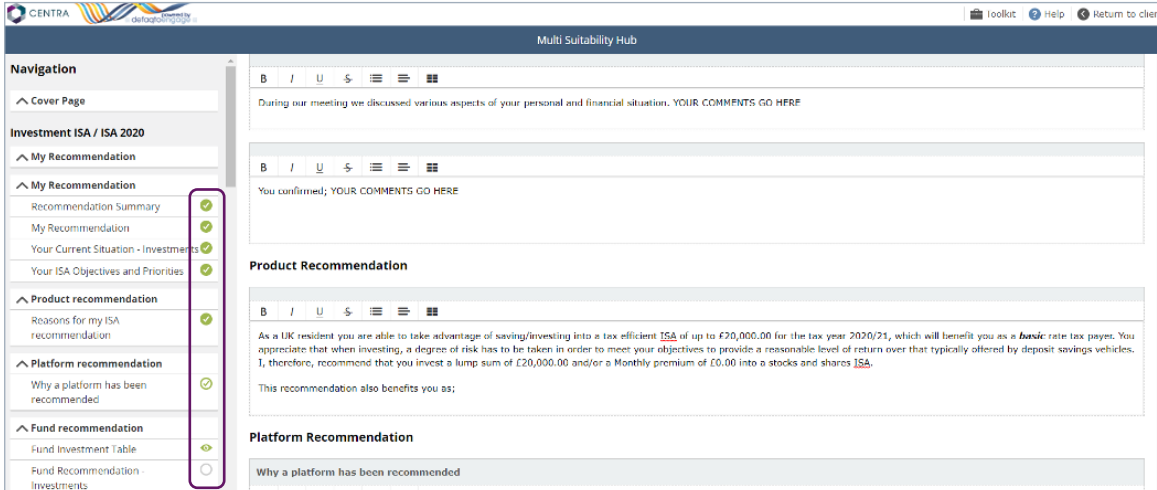
Click a section on the left. Some sections are free format text boxes, whilst others have pre-built options for you to customise the report. Add all the information for that section. A green circle with a tick symbol ✓ means that the section is complete.
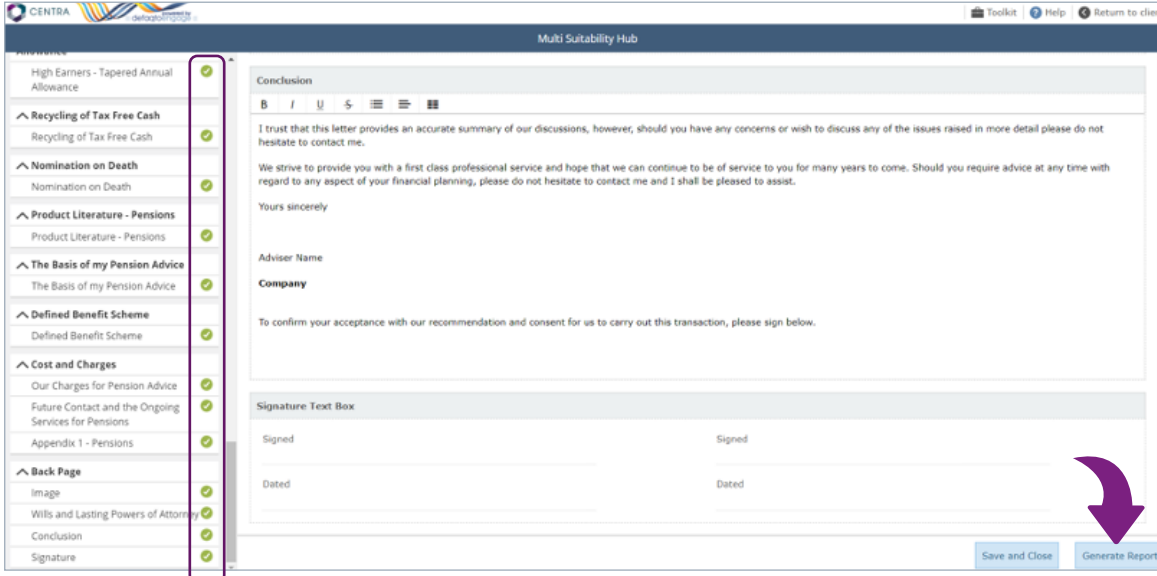

Some sections will contain examples of information to help create a compliant report. You can copy and paste this information if you wish, or type free format into the test box. Once you have completed that section, click **Close**.
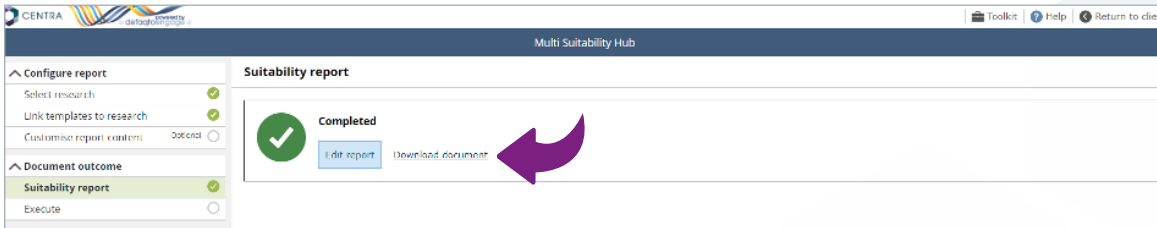
A green circle with a tick symbol ✅ will show that the section is complete. Work through each section. Once all the sections are completed, and the show green tick symbol ✅, you will then be able to generate your suitability report.
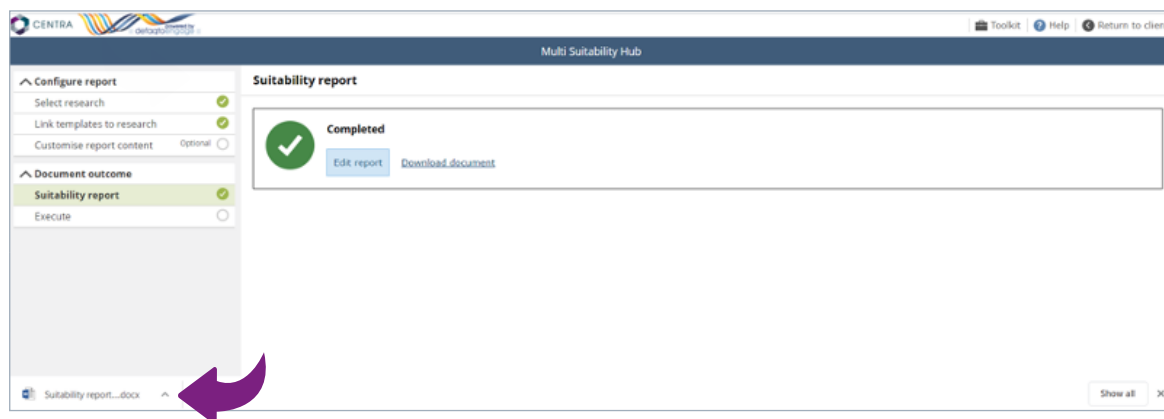

Click **Generate Report** once you have completed all sections.

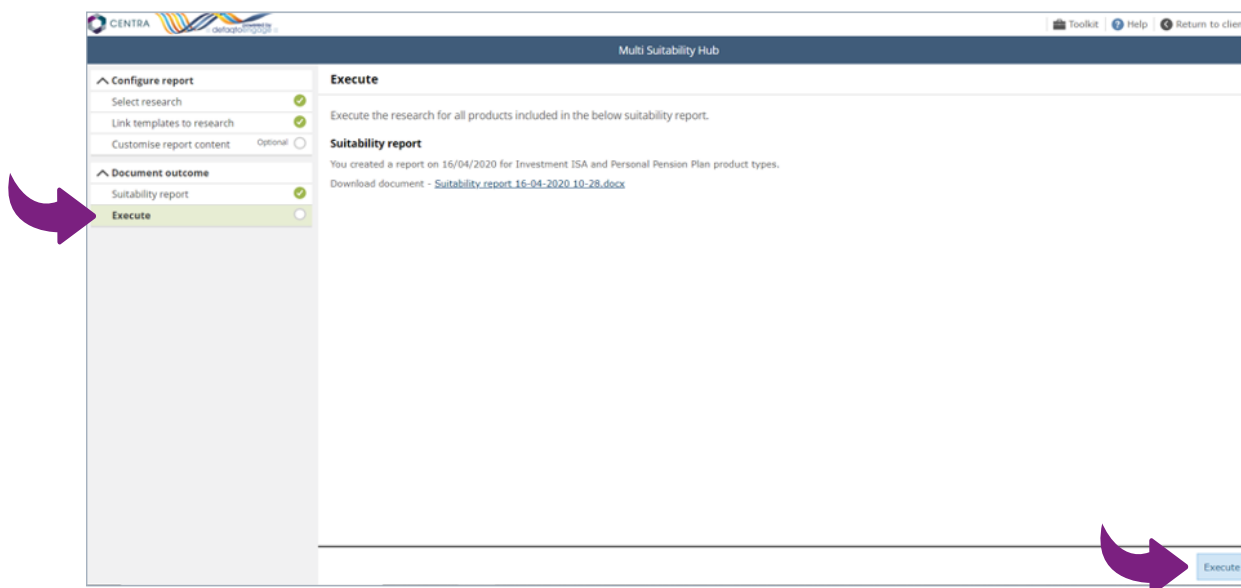Your report is now ready. Click **Download** to view.

A Microsoft Word document will download, allowing you to open up your Suitability Report and make any amenedments you may wish to.

Once you have opened and viewed your report, make any final changes.

To finalise the process and execute the report click **Execute**.

Your recommendation has now moved from a proposal for the client, to a live product.

If you have any questions or need any further information please call **0808 124 0000** or email **investmentservices@simplybiz.co.uk**