Panel Management

Last Modified on 26/04/2017 2:30 pm BST

Select **Setup** from the menu on the left hand side and then choose **Panel Management:**

Set	qu	
2	Organisation Structure users and access	
🕶 API	PLICATION SETTINGS	
\$	Contacts	
	Service Levels	
\$	Synaptic Comparator	
	Adviser Charges	
	Assets Under	
	Panel Management	Þ
	Report Features	
\$	Fund Management Panels and Portfolios	
	Fund Panel	
	Portfolio Builder	
\$	Corporate Settings Special Deals & Models	
	Applied Special Deals	

You will then see the **Panel Management** menu:

Panel Management	
elect the Platforms and Investment wrappers that you wish to include in your firm's research.	
Platform Off Platform	
▲ 🖌 All pletforms	
A) Bell (Sippcentre) - A) Bell Sippcentre	
Alliance Trust Savings Limited - Alliance Trust Savings Linvest	
Ascentric - Ascentric - The Whole of Market Wrap	
Avaion Investment Services - Freedom Portfolio Range	
Aviva Wrap UK Ltd - Aviva Wrap	
AVA Elevate - Elevate - Composite Charge	
AXA Elevate - Elevate - Explicit Charge	
> Colunds Ltd - Colunds	
Fidelity FundsNetwork - Fidelity FundsNetwork	
Fidelity FundsNetwork - Fidelity FundsNetwork Account Fee	
🖌 James Hay Partnership - James Hay Partnership Wrap	
D I Novia - Novia Wealth Management Service	
b Z Nucleus - Nucleus	
Z Raymond James Investment Services Ltd - AdviserChoice	
▷ 😿 Seven Investment Management - 7IM Platform (advisory)	
Seven Investment Management - 7IM Platform (discretionary)	
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Panel Management will allow you to remove or enable a previously excluded Platform in your research. There is also an option to do this for the Off Platform products which are included on Comparator.

You have three options when excluding Platforms:

1) You can exclude the whole Platform by clicking to remove the tick against the platform name,

2) You can click on the triangle icon to expand the selection, and remove wrapper types within the Platform from your research (SIPP, Bonds, PP etc..):

3) You can open up a wrapper type and remove a specific product.

The example shown is for Ascentric. Use the arrows to the left of each section to open up the menu further:

- 🖌 🖌 Ascentric Ascentric The Whole of Market Wrap
 - 👂 🖌 ISA
 - Offshore Bond
 - 👂 🖌 Onshore Bond
 - 🖌 🖌 SIPP
 - AJ Bell Sippcentre SIPP AJ Bell (Sippcentre)
 - ✓ Alltrust SIPP Alltrust Services Limited
 - Ascentric Pension Account Ascentric
 - BrilliantWithMoney SIPP BrilliantWithMoney
 - Dentons SIPP Dentons Pension Management Limited
 - Elite Retirement Account Talbot & Muir SIPP LLP
 - Full SIPP @SIPP Pension Trustees Ltd
 - VIPM Personal Pension Scheme I.P.M. SIPP Administration Limited
 - MC Trustees Self Invested Pension M C Trustees Limited

When you click on a Platform, or an element of a platform, you will be asked to provide an **Exclusion Reason:**

	Exclusion Reason
2	Please enter a reason for excluding this platform.
I	1
	OK Cancel

This **Exclusion Reason** will appear on the report you generate at the end of the research to explain why the platform was not included in your results.

To enable a previously excluded Platform, simply re-tick the Platform for it to re-appear in your results.

To do this for the **Off Platform** products, click on the tab at the top of the page:

latform	Off Platform
⊿ ✓ Off	Platform Products
	Offshore Bond
> 1	Onshore Bond
4 1	op
	active money personal pension - Initial Commission (Full) - Standard Life Assurance Ltd
	Flexible Pension Plan - Financial Adviser Charge Option - AEGON
	Pension Portfolio (Financial Advisers Fee) - Scottish Life (Royal London)
	Personal Pension - Aviva Life & Pensions UK Limited
	Pru Flexible Retirement Plan - Prudential Intermediary Division
	Retirement Wealth Account FAR (Nil Commission) - AXA Wealth
	Self Invested Personal Pension - Zurich Assurance Ltd
	The Retirement Account - Flexible Commission - Scottish Widows
D V S	IPP

Once you have finished enabling/excluding in **Panel Management**, click **Save** to record your changes and exit the **Panel Management** menu. Alternatively, you can click **Cancel** if you decide not to keep the changes.