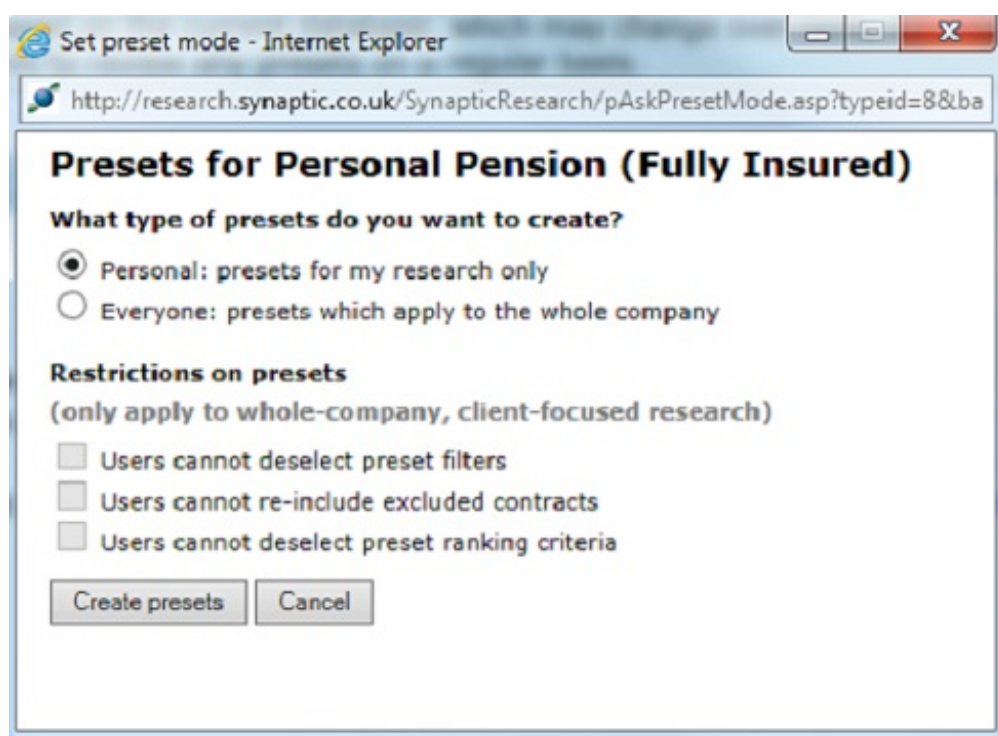


Can I distribute personal presets across the firm?

Last Modified on 23/03/2020 2:56 pm GMT

As described above, we recommend that presets are initially created in personal mode, so that they only apply to you. You then distribute the presets across your firm once you have finished editing them.

You can do this by clicking on the **Change preset mode** in the menu bar when editing the presets. This displays the same pop-up options window which appears when you first create the presets, and is illustrated by the screenshot below.



Set preset mode - Internet Explorer

http://research.synaptic.co.uk/SynapticResearch/pAskPresetMode.asp?typeid=8&ba

Presets for Personal Pension (Fully Insured)

What type of presets do you want to create?

Personal: presets for my research only

Everyone: presets which apply to the whole company

Restrictions on presets
(only apply to whole-company, client-focused research)

Users cannot deselect preset filters

Users cannot re-include excluded contracts

Users cannot deselect preset ranking criteria

Create presets Cancel

To distribute the presets across your firm, you simply change the mode from Personal to Everyone. The presets then take effect for all new research the moment that you click on the **Change Preset Mode** button – no delay, no need to e-mail files to users etc.

Locking the presets

You can choose whether to lock parts of the presets when distributing them across the firm. Each of the following can be locked or left unlocked independently:

- Filtering.
- Manual exclusion of contracts.
- Ranking.

The screenshot below shows an example of the effect on an adviser if the filtering has been locked. When they create new research for the product type, the preset filtering is automatically filled in and the adviser cannot undo it – the tick box for the filter is disabled.

The screenshot shows the Synaptic Software interface for 'Individual Savings Accounts'. The top navigation bar includes 'Filtering (using preset criteria)', 'Ranking', 'Report', 'Comparison', 'Change title', 'Save as PDF', 'Delete', 'Copy', 'Send', 'Not shared', and 'Help'. The left sidebar contains a 'Features' panel with the following options:

- Cash element
 - Cash based Unit Trust/OEIC
 - Cash account
 - Stocks and shares element
 - Fixed rate of interest
 - Variable rate of interest
- Payment methods
 - BACS
 - Cash
 - Cheque
 - Debit card over telephone
 - Debit card via the internet
 - Direct debit

Buttons at the bottom of the sidebar include 'Clear all filters', 'Audit trail', and 'Import filter'. The main content area shows a table with 10 contracts out of 95 (11%) - 0 manually excluded. The table has two columns: 'Company' and 'Contract'.

Company	Contract
AEGON Retirement Choices	AEGON Stocks & Shares ISA
AXA Elevate	Elevate Stocks & Shares ISA - Explicit
James Hay Partnership	Modular Stocks & Shares ISA
Novia	Novia Stocks & Shares ISA
Nucleus	Nucleus ISA account
Seven Investment Management	ISA (Stocks and Shares)
Standard Life Assurance Ltd	Standard Life FundZone ISA
Standard Life Assurance Ltd	Wrap ISA
Zurich Intermediary Platform	Zurich Intermediary Platform - Cash ISA Account
Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares ISA

The URL at the bottom of the browser window is <http://research.synaptic.co.uk/SynapticResearch/index.asp>.

Advisers can add further filtering (or further ranking, or further manual exclusion of contracts), but they cannot undo what the compliance officer has preset – unless they have been marked as trusted.