

# How do I create preset criteria?

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Preset criteria can be created using the **Preset criteria** link on the menu bar of the home page. This displays the screen illustrated by the screenshot to the below.

**Personal and company presets**

Preset criteria, for client-focused research | Home page | Help

Any presets created will be based on the current database, which may change over time, e.g. new fields may be introduced. We would strongly recommend you to review any presets on a regular basis.

Pension savings Pension income Life Health Investment Finance Offshore ■ = whole-company ■ = personal

Product Type	Preset Criteria
<b>Auto Enrolment</b>	(none)
Auto Enrolment	(none)
<b>Group Personal Pension (Including Stakeholder)</b>	(none)
Group Personal Pension (Including Stakeholder)	(none)
<b>Personal Pension (Fully Insured)</b>	Presets: Personal Pension Balanced, Presets: Personal Pension Adventurous, Presets: Personal Pension Cautious, (create new)
Personal Pension (Fully Insured)	(using criteria for whole product type)
<b>Section 32</b>	(none)
Section 32	(none)
<b>Self Invested Personal Pension</b>	(none)
Full	(none)
Hybrid	(none)
<b>Small Self Administered Scheme</b>	(none)

Presets can be created either at product-type level, applying to all sub-types of product within it, or to individual sub-types. In the example illustrated by the screenshot one lot of presets has been created for all types of executive pension, and there are also presets which apply specifically to unit-linked regular-premium personal pensions.

You create new presets, or edit existing ones, by clicking on the text (such as “(none)”) in the second column. This displays the pop-up options window illustrated in the second 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

At this stage you can choose whether to create presets for the whole company, or personal presets for yourself only (users cannot choose the Everyone option unless they have been given permission to do this). These options can be changed after the presets have been started.

We recommend that all presets are initially created in personal mode (and the system will warn you if you don't follow this recommendation). Otherwise, the new presets are instantly distributed across your firm, and are re-distributed each time you add more filtering etc.

Therefore, it's better to create the presets in personal mode so that they don't initially affect other people, tweak the presets until you're happy with them, and then only distribute the presets once you've finished.

#### Setting up filtering, excluded contracts, and ranking

Once you click on the **Create presets** button (as illustrated by the second screenshot), the system displays the editing window illustrated by the screenshot below:

Edit personal presets | Change preset mode | Ranking | Comparison | Change title | Save as PDF | Delete presets | Presets list | Help

Features | Sectors | Conditions | Stats | PP

All 25 contracts - 0 manually excluded

Company	Contract	Basis
AEGON	One Retirement	Personal Pension (Fully Insured)
Aviva Life & Pensions UK Limited	Personal Pension	Personal Pension (Fully Insured)
Aviva Wrap UK Ltd	Pension Portfolio	Personal Pension (Fully Insured)
AXA Life Invest (AXA Life Europe)	Secure Advantage+ Pension Plan	Personal Pension (Fully Insured)
AXA Wealth	Retirement Wealth Account (Adviser Char)	Personal Pension (Fully Insured)
Canada Life	CanRetire Pension Investment Plan	Personal Pension (Fully Insured)
Cofunds Ltd	Cofunds Pension Account (provided by S)	Personal Pension (Fully Insured)
FundsNetwork	FundsNetwork Personal Pension	Personal Pension (Fully Insured)
HSBC Bank Plc	HSBC World Selection Personal Pension	Personal Pension (Fully Insured)
Legal & General	Portfolio Plus Pension	Personal Pension (Fully Insured)
LV=	Flexible Transitions Account	Personal Pension (Fully Insured)
LV=	Insured Personal Pension	Personal Pension (Fully Insured)
MetLife Services Ltd	MetLife Retirement Portfolio - Protected G	Personal Pension (Fully Insured)
MetLife Services Ltd	The MetLife Retirement Portfolio (Secure	Personal Pension (Fully Insured)
MetLife Services Ltd	The MetLife Retirement Portfolio (Secure	Personal Pension (Fully Insured)
Old Mutual Wealth	Collective Retirement Account	Personal Pension (Fully Insured)
Old Mutual Wealth	CRA Wealth Select	Personal Pension (Fully Insured)
Old Mutual Wealth	Personal Pension - Single Price	Personal Pension (Fully Insured)

Options

Flexible access drawdown facility  
 Option to take full UFPLS  
 Option to take partial UFPLS  
 Payment frequency options  
 Payment methods  
 Pension premium insurance  
 Guarantee options  
 Accept minors  
 Switching option  
 Automatic rebalancing  
 Lifestyle strategy  
 Model portfolios  
 Death benefits  
 Take note of life cover

This is very, very similar to normal research. You simply set up all the filtering you want to be preset, and also any contracts which you want to be manually excluded (see warning below). In the example screenshot (for executive pensions), contracts are removed unless they offer optional indexation and reducible contributions (at any time), and there is also a contract that has been manually excluded from the list.

You can preset all the sorts of filtering which are available in the course of normal research: not just features, but also filtering on sectors, specific funds, policy conditions, financial strength, projected stats, and past performance.

You can also create preset ranking criteria by clicking on the **Ranking** link (in the usual way), defining your preset ranking features, and then clicking on the **Save ranking presets** button (which is displayed instead of the usual **Calculate** button).

## Reports

If you want paper documentation of your presets then you can use all the normal reports which are available in the course of research: the audit trail, comparison reports, ranking results, exports etc.

## Deleting presets

Presets can be deleted by using the **Delete presets** link on the menu bar (which is equivalent to the normal **Delete** link which is displayed when editing normal research).

**WARNING!** – Once a contract has been manually excluded in Preset Criteria, it will remain excluded within that preset until it is re-included or until it is withdrawn by the product provider. If your reasons for the exclusion of the contract are in respect of its features, conditions, statistics, performance etc, you should be aware that even if the data changes, the contract will remain excluded. If manual exclusions have been used within Preset Criteria, we strongly recommend that manual exclusions are revisited periodically to ensure that the reasons for exclusion remain valid.

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