

Can I create multiple presets?

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As described above, you can create more than one set of presets for each product type. In the example illustrated by the screenshot below, there are three groups of presets defined for Personal Pensions, based on risk (and you could create a fourth or more by clicking on the “new” link).

The screenshot displays the 'Personal and company presets' interface. At the top left is the Synaptic Software logo. The main title is 'Personal and company presets'. Below the title is a navigation bar with 'Preset criteria, for client-focused research' and 'Home page | Help'. A yellow warning box states: '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.' Below this is a table of product types and their associated presets. The table has columns for product types and their current preset status. A legend indicates that red squares represent 'whole-company' and blue squares represent 'personal'.

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

When creating multiple presets we recommend that you use the facility to change the title of the research so that advisers can distinguish between the purposes of the different presets.

How the adviser chooses between different presets

If more than one set of presets has been defined for a product type, the adviser is given the opportunity to choose between them when starting new research. This is illustrated by the client-entry screen in the screenshot below.



Personal Pension (Fully Insured)

Enter client data

Start research | Skip client entry | Help

Preset criteria

- Presets: Personal Pension Adventurous
- Presets: Personal Pension Balanced
- Presets: Personal Pension Cautious

Client entry

Skip client entry

Client 1

First name:

Last name:

Date of birth: (dd/mm/yyyy)

Sex: ▼

Smoker: Yes
 No

Occupation:

Annual earnings:

Benefits/contributions

Retirement Age: years

Term: years

(Leave fields below blank if other premium frequency required):

The adviser can choose any one of the presets you have defined – e.g. because they represent different model portfolios – but has to choose one of them. They cannot start client-focused research from scratch.

However, if compliance officers want to allow advisers the choice of a preset or starting from scratch, they can create a set of presets with no features, sectors, conditions etc selected. This would behave like a set of presets, but would allow advisers to select any of the features of the product.