

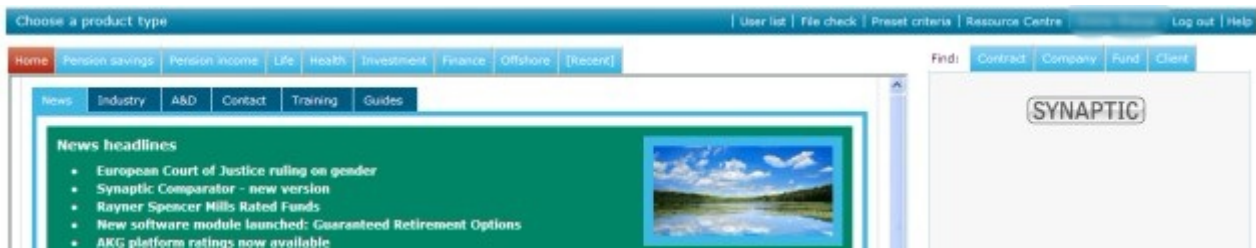
How do I set up Personal Preset Criteria?

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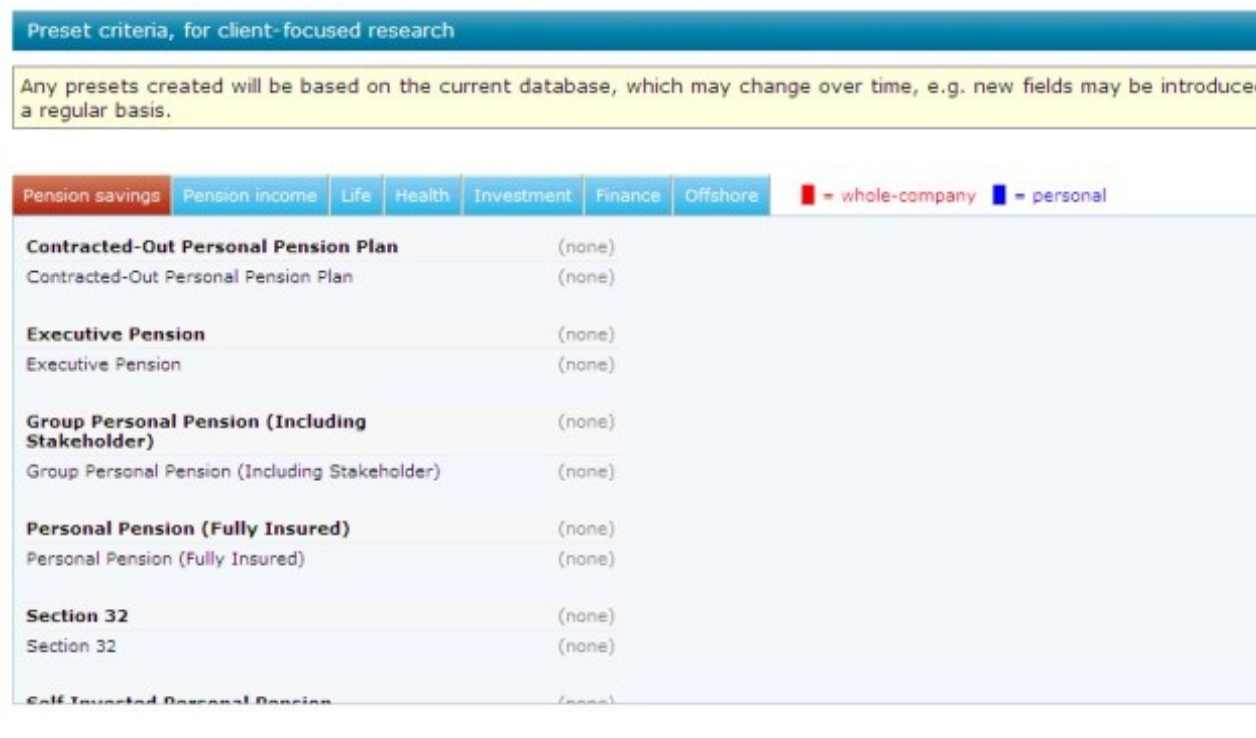
If, when doing research for a particular product, you always choose the same basic criteria then you could save yourself time and set these up as **Preset Criteria**. Presets can be set up on a Personal basis (just for you to use) or a Company basis (for all users of a licence to use).

This article confirms how to set up Personal preset criteria.

Within Synaptic Research, select the **Preset criteria** button from the Menu Bar:



The following will appear, select the product that the preset criteria need to be set up for, by clicking on None:



Once **None** has been selected, a box will appear asking what type of presets need to be

set up. Choose **Personal**:

Set preset mode -- Webpage Dialog

http://research.synaptic.co.uk/vsr/pAskPresetMode.asp?typeid=8&basisid=9¤ttmc

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

http://research.synaptic.co.uk/vsr/pAskPresetMode.asp? Internet

Now click **Create presets** to continue. Once in the next screen choose the criteria that you will always use for your research:

Filtering (using preset criteria) | Ranking | Report | Quote

5 contracts out of 25 (20%) - 0 manually excluded

Company	Contract
AXA Wealth	Retirement Wealth Account (Adviser Charging)
Intelligent Money LTD	The Intelligent Pension
LV=	Insured Personal Pension
Scottish Life (Royal London)	Pension Portfolio
Scottish Widows	The Retirement Account - Initial Adviser Charging

Guarantee options

Accept minors

Switching option

All switches free

Automatic rebalancing

Lifestyle strategy

Model portfolios

Death benefits

Integrated life cover

Switch to self investment

Phased retirement

Total permanent disability benefit

Loyalty bonus

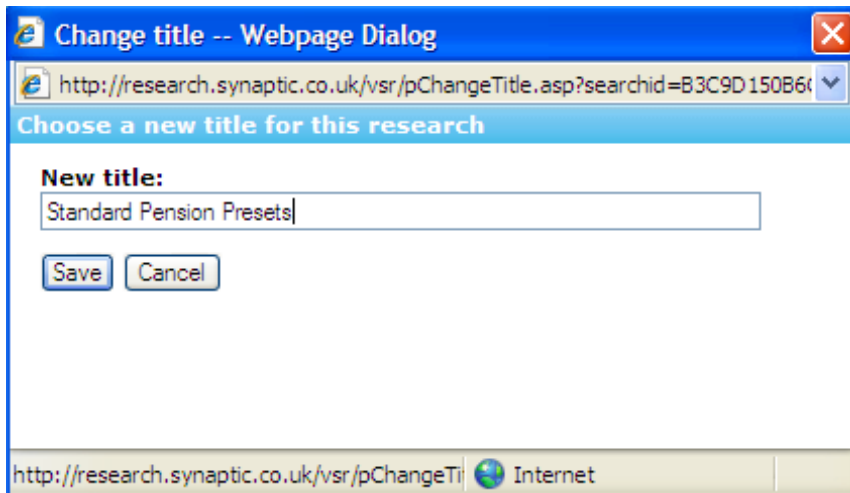
Indexation

Accept pension credits on divorce

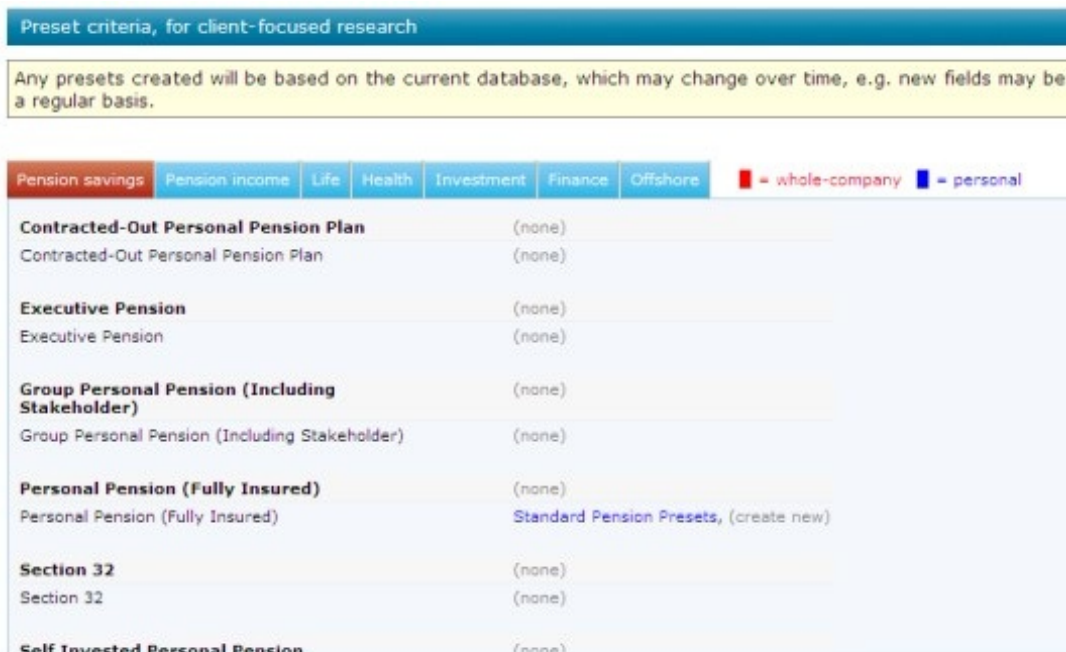
Clear all filters Audit trail Import filter

Once the criteria have been chosen, it is useful to re-name the preset criteria. Use the **Change Title** button on the Menu Bar:

Complete the title and click **Save**:



Once done, navigate back to the preset criteria list - using **Presets List** on the Menu Bar. This preset will now be showing. To set up additional presets for the same product, simply click on **(Create new)** and repeat the process:



When a piece of research is now being done for this product type, there will be some subtle differences. On the Pension Savings page, there will be an indication that Personal Pensions have some preset criteria:

Choose a product type		User list	File check	Preset					
Home	Pension savings	Pension income	Life	Health	Investment	Finance	Offshore	[Recent]	
Contracted-Out Personal Pension Plan					10 contracts	8 providers			
Executive Pension					3 contracts	3 providers			
Group Personal Pension (Including Stakeholder)					18 contracts	9 providers			
Personal Pension (Fully Insured)					Personal presets	20 providers			
Section 32					9 contracts	8 providers			
Self Invested Personal Pension					97 contracts	66 providers			
Full					24 contracts	14 providers			
Small Self Administered Scheme					2 contracts	1 provider			
Full					27 contracts	27 providers			
Hybrid					3 contracts	2 providers			
Stakeholder									

After selecting **Personal Pension (Fully Insured)** to start some research, when entering the client details, confirmation will show at the top of the page that preset criteria will be used for this piece of research:

Enter client data

Preset criteria

Standard Pension Presets

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):

When the **Start Research** button is selected, the filtering criteria set up within the preset criteria will automatically be applied to the piece of research:

Filtering (using preset criteria) | Ranking | Report | Quote

Features | Sectors | Conditions | Stats | PP

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As these are Personal Presets, they can be amended for a piece of research i.e. a filtering criteria can be unchecked.

You have now completed this task.

For details of setting up Company presets, please see article 'How do I set up Company Presets?'