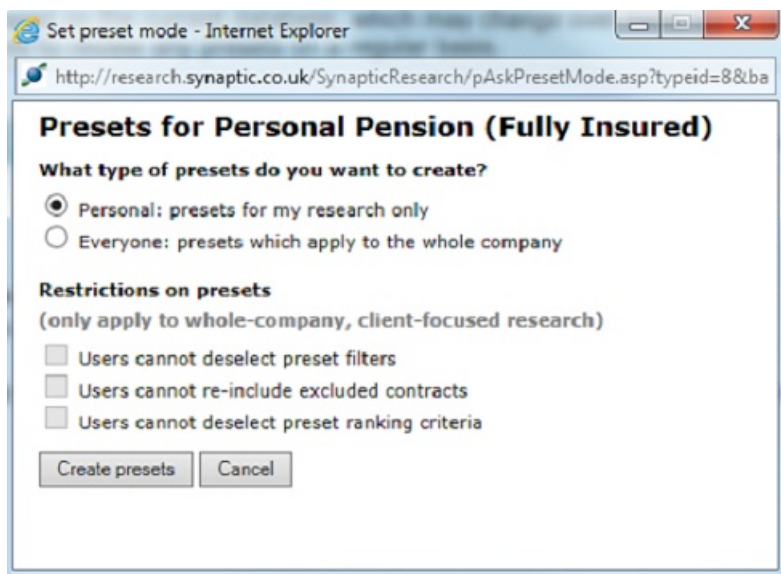


Can I distribute personal presets across the firm?

Last Modified on 10/01/2024 12:36 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.



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.

Filtering (using preset criteria) | Ranking | Report | Comparison | Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

Features | Sectors | Conditions | Stats | PP

10 contracts out of 95 (11%) - 0 manually excluded

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

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

Clear all filters | Audit trail
 Import filter

<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.