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).

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.

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.