How do I set up Personal Preset Criteria?

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clicking on None:

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:

Choose a product type	User list File check Preset criteria Resource Centre Log out Help
Home Pension savings Pension income Life Health Investment Finance Offshore [Recent]	Finds Contract Company Fund Client
News Industry AbD Context Training Guides News headlines . <th>(SYNAPTIC)</th>	(SYNAPTIC)

The following will appear, select the product that the preset criteria need to be set up for, by

Pension savings Pension income Life Health	Investment	Finance	Offshore	= whole-company	= personal
Contracted-Out Personal Pension Plan	(no	one)			
Contracted-Out Personal Pension Plan	(nc	one)			
Executive Pension	(none)				
Executive Pension	(none)				
Group Personal Pension (Including Stakeholder)	(none)				
Group Personal Pension (Including Stakeholder)	(none)				
Personal Pension (Fully Insured)	(no	one)			
Personal Pension (Fully Insured)	(no	(none)			
Section 32	(no	one)			
Section 32	(no	(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¤tmc 💙					
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	
Features Sectors Conditions Stats PP		S contra	cts out of 25 (20%) - 0 manually excluded	
Guarantee options	~			
Accept minors		Company	Contract	
Switching option		AXA Wealth	Retirement Wealth Account (Adviser Charging)	
All switches free		Intelligent Money LTD	The Intelligent Pension	
		LV-	Insured Personal Pension	
Automatic rebalancing		Scottish Life (Royal London)	Pension Portfolio	
Lifestyle strategy		Scottish Widows	The Retirement Account - Initial Adviser Charging	
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:

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

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:

Any presets created will be based on the cu a regular basis.	arene databa	, wing	rinay char	rge over time, e.	g. new news may b
Pension savings Pension income Life Health	Investment	Finance	Offshore	= whole-comp	any 🚦 = personal
Contracted-Out Personal Pension Plan	(na	ine)			
Contracted-Out Personal Pension Plan	(nd	(none)			
Executive Pension	(none)				
Executive Pension	(none)				
Group Personal Pension (Including Stakeholder)	(none)				
Group Personal Pension (Including Stakeholder)	(none)				
Personal Pension (Fully Insured)	(none)				
Personal Pension (Fully Insured)	Standard Pension Presets, (create new)			(create new)	
Section 32	(no	(none)			
Section 32	(no	(none)			

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:

hoose a product type				User la	it File check	Pres
ome Pension savings	Pension income Life Health	Investment Finance	e Offshore [Recent]			
Contracted-Out Person	al Pension Plan					
Contracted-Out Personal I	Pension Plan			10 contracts	8 providers	
ecutive Pension						
Executive Pension				3 contracts	3 providers	
Group Personal Pensio	on (Including Stakeholder)					
Froup Personal Pension (Including Stakeholder)			18 contracts	9 providers	
Personal Pension (Full	ly Insured)					
ersonal Pension (Fully In	nsured)			Personal presets	20 providers	
Section 32						
ection 32				9 contracts	8 providers	
self Invested Personal	I Pension					
ull .				97 contracts	66 providers	
lybrid				24 contracts	14 providers	
imall Self Administere	ed Scheme					
eferred				2 contracts	1 provider	
ull				27 contracts	27 providers	
lybrid Stakeholder				3 contracts	2 providers	

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 Pres	iets		
Client entry Skip client entry			
	Client 1 Load		
First name:	Devid		
Last name:	Smith		
Date of birth:	15/9/1970 (dd/mm/yyyy)		
Sex:	Male 🖌		
Smoker:	 Yes No 		
Occupation:	Electrical Engineer (no testing) Search		
Annual earnings:	48000		
Benefits/contributions			
Retirement Age:	65 years		
Term:	25 years		
(Leave fields below blank if of	ther 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 € Quot	
Features Sectors Conditions Stats PP 🔳		5 contra	cts out of 25 (20%) - 0 manually excluded	
Guarantee options	~			
Accept minors		Company	Contract	
Switching option		AXA Wealth	Retirement Wealth Account (Adviser Charging)	
All switches free		Intelligent Money LTD	The Intelligent Pension	
		LV-	Insured Personal Pension	
Automatic rebalancing		Scottish Life (Royal London)	Pension Portfolio	
Lifestyle strategy		Scottish Widows	The Retirement Account - Initial Adviser Charging	
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				

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?'.