

How do I start a piece of research?

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You start a new piece of research by choosing a product type on the software's Home page.

This displays the client-entry screen illustrated by the first screenshot. You

can then choose between two types of research:

The screenshot shows the 'Investment Bond' software interface. At the top right, it says 'Investment Bond Unit Linked'. Below that is a navigation bar with 'Enter client data', 'Start research', 'Skip client entry', and 'Help'. The main form is titled 'Client entry' and has a 'Skip client entry' button. It is divided into two columns: 'Client 1' and 'Client 2 (optional)'. Each column has a 'Load' button. The 'Client 1' section includes fields for 'First name', 'Last name', 'Date of birth' (with a date format hint '(dd/mm/yyyy)'), 'Sex' (with a dropdown menu showing 'Male'), 'Smoker' (with radio buttons for 'Yes' and 'No'), 'Occupation' (with a 'Search' button), and 'Annual earnings'. The 'Client 2 (optional)' section has similar fields for 'First name', 'Last name', 'Date of birth', 'Sex' (with a dropdown menu showing 'Female'), 'Smoker', 'Occupation', and 'Annual earnings'. Below these sections is a 'Benefits/contributions' section with a 'Contribution' field (with a pound sign '£') and a 'Start research' button.

- “Client-focused” – i.e. research into a specific recommendation for a client. You fill in the client's details, and any benefits/contributions which are relevant to the policy, and then click on the **Start research** button.
- “Product-focused” – i.e. general research into the features of the contracts available on the market. Client and benefit details are not relevant in product-focused research, so you simply click on the **Skip client entry** button.

The differences between client-focused and product-focused research are described in the next section.

Entering client and benefit details

When the client-entry screen doesn't appear

There are two circumstances under which the client-entry screen does **not** appear, and you are instead taken straight to the research grid when you choose the product type to research:

- Your firm has not paid for the client-focused functionality of Synaptic Research. Please contact your Synaptic account manager if you want to upgrade your licence.

You have chosen to do research into all bases of a product type. This sort of research can only be done in product-focused mode, and therefore the software does not give you the option of entering client details.
