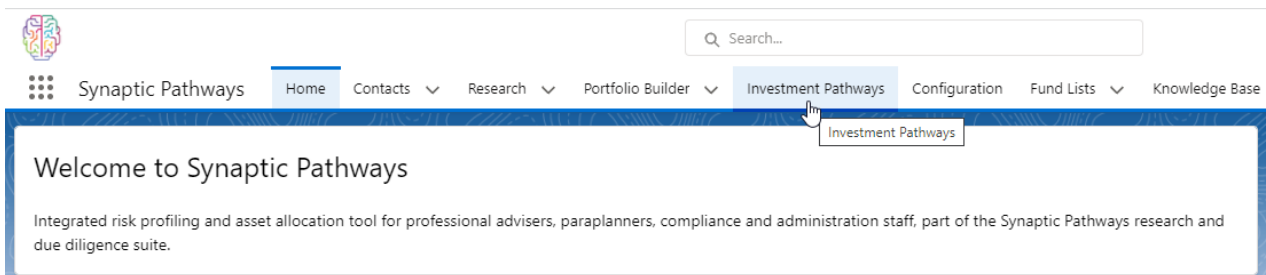


How do I set a Central Investment Proposition to active?

Last Modified on 24/11/2021 12:24 pm GMT

Navigate to **Investment Pathways**:



When creating a Central Investment Proposition, you will get the choice of making it **Active** upfront:

A screenshot of the "New Central Investment Proposition (CIP)" form. The form has a title bar with "Active" and "Last Modified" dropdowns. The main content area contains three fields: "CIP Name" with the value "Test CIP", "CIP Description" with the value "Test CIP Description", and "Mark Active" with a checked checkbox. At the bottom right, there are "Cancel" and "Save" buttons. A mouse cursor is pointing at the "Mark Active" checkbox.

If you would prefer to work on the CIP before marking it as active, you can navigate back to **Investment Pathways** once you have completed the setup.

In the Central Investment Proposition area, find the record you have created.

Investment Pathways

Central Investment Proposition New

Name	Description	Active	Last Modified	Owner
SMS		No	12/10/2021, 17:34	[Owner Name]
CIPAPOct		No	27/10/2021, 09:39	[Owner Name]
HighNetWorth	High Net Worth	Yes	19/10/2021, 17:56	[Owner Name]
CIPAP2021	CIP test Description	Yes	21/10/2021, 15:58	[Owner Name]
CIPSM1	Retirement	Yes	22/10/2021, 09:48	[Owner Name]

On the right side of the record, click into the drop down arrow & **Edit**:

Central Investment Proposition New

Name	Description	Active	Last Modified	Owner
SMS		No	12/10/2021, 17:34	[Owner Name]
CIPAPOct		No	27/10/2021, 09:39	[Owner Name]
HighNetWorth	High Net Worth	Yes	19/10/2021, 17:56	[Owner Name]
CIPAP2021	CIP test Description	Yes	21/10/2021, 15:58	[Owner Name]
CIPSM1	Retirement	Yes	22/10/2021, 09:48	[Owner Name]

Context menu for CIPAPOct: Edit, Delete

Tick the **Mark Active** box:

Active Last Modified

Edit Central Investment Proposition(CIP)

* CIP Name

CIP Description

Mark Active

Cancel Save

Filter by Sunaptic Risk Rating

Save:

Active
Last Modified
✕

Edit Central Investment Proposition(CIP)

* CIP Name

CIP Description

Mark Active

Cancel
Save

Once saved, a success message will appear:

★ + 🏠 ? ⚙️ 🔔 👤

Synaptic Pathways
Home
Contacts
Research
Portfolio Builder
Investment Pathways
Configuration
Fund Lists
Knowledge Base

Investment Pathways

✓ Success!
✕

Central Investment Proposition New

Name	Description	Active	Last Modified	Owner
SMS		No	12/10/2021, 17:34	David Kelly
CIPAPOct		Yes	27/10/2021, 09:46	Gregory Johnson
HighNetWorth	High Net Worth	Yes	19/10/2021, 17:56	Michael Smith
CIPAP2021	CIP test Description	Yes	21/10/2021, 15:58	Gregory Johnson
CIPSM1	Retirement	Yes	22/10/2021, 09:48	Michael Smith