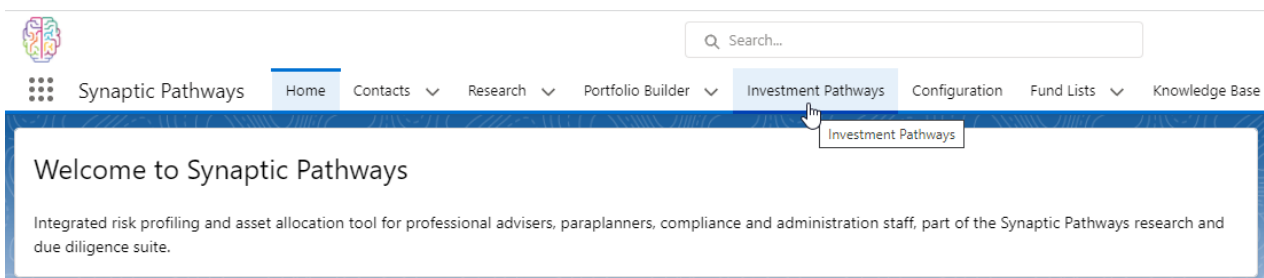


I have created a Central Investment Proposition, but I can't see it reflected in the research?

Last Modified on 15/11/2021 4:36 pm GMT

You will need to make sure the Central Investment Proposition is set to active.

Navigate to **Investment Pathways:**



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

If the Active column shows the CIP as Inactive, you will need to activate this for it to be reflected in the research.

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

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

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

Tick the **Mark Active** box:

Active Last Modified

Edit Central Investment Proposition(CIP)

* CIP Name

CIP Description

Mark Active

Cancel Save

Filter by Synaptic Risk Rating

Save:

Active Last Modified

Edit Central Investment Proposition(CIP)

* CIP Name

CIP Description

Mark Active

Cancel Save

Filter by Synaptic Risk Rating

Once saved, a success message will appear:

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

Search...

Success! Central Investment Proposition CIPAPOct was updated successfully.

Central Investment Proposition

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

When creating research, you can select your chosen segment. It will also be shown in the summary

bar at the top of the screen:

Choose

Select a segment from the list to use as the basis for this illustration OR enable Whole of Market 'mode' to select from all available products and funds.

*Choose Segment

Test Segment 1

✓ Test Segment 1

Segment CIP 2

Use Whole of Market Disabled

[Save](#)

Research			
Test Client Illustration			
Client	Description	Illustration Type	Segment Name
Test Client		Segment	Test Segment 1

Please note - It is worth making sure your segment names are unique to the CIP, if you have multiple CIPs with similar segments, you may not be able to differentiate between them.