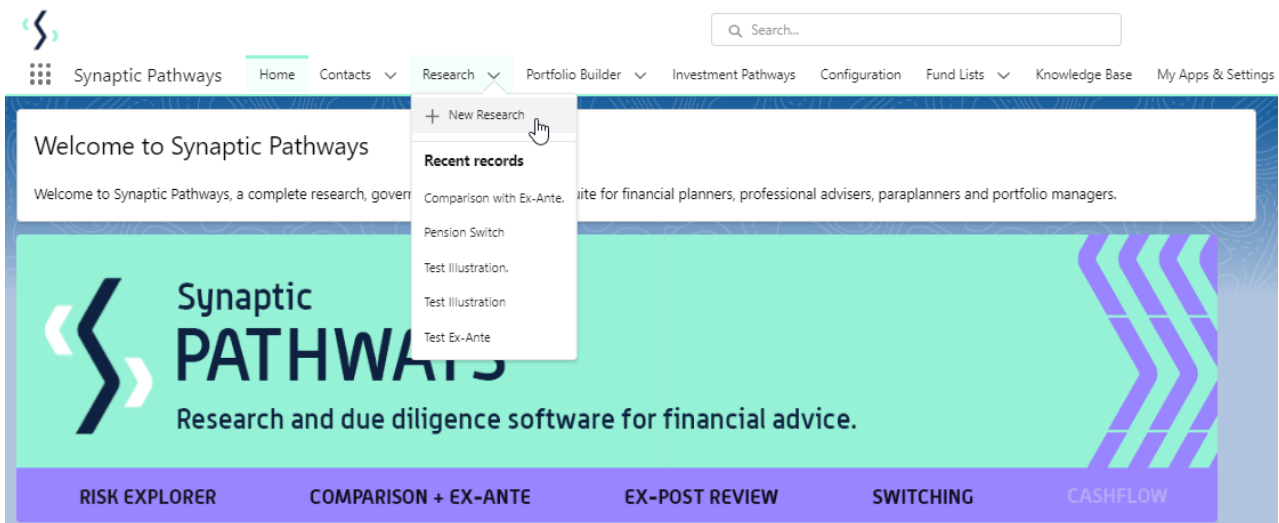


Switching - Creating through the homepage

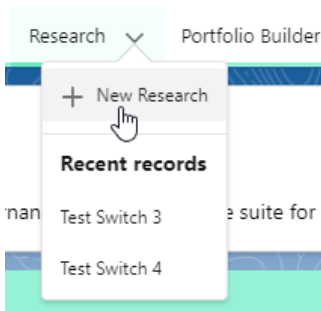
Last Modified on 27/04/2022 2:59 pm BST

Switching research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create switching research directly from the Homepage, hover over the Research tab and select the down arrow:



Select **New Research**



Select **Switch:**

New Research

Select a record type

- Comparison with Ex-ante
Select this option to compare platforms and products BEFORE executing an Illustration as a single or multiple wrapper report
- Ex-ante (Pre-Sales)
Select this option to create an Ex-ante (pre-sales) illustration for a single product
- Switch
Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.

[Cancel](#) [Next](#)

As we have created the research directly from the homepage, you will need to search for the client:

New Research: Switch

Information

Client

Show All Results for "CI"

Recent Contacts

- Client Test
- + New Contact

Activity Due Date

[Cancel](#) [Save & New](#) [Save](#)

Note - **Client** field will already be completed if research is created in the contact record.

Complete the remaining fields:

New Research: Switch

Information

Client

* Illustration Name

Description

Activity Due Date

Save:

New Research: Switch

Information

Client

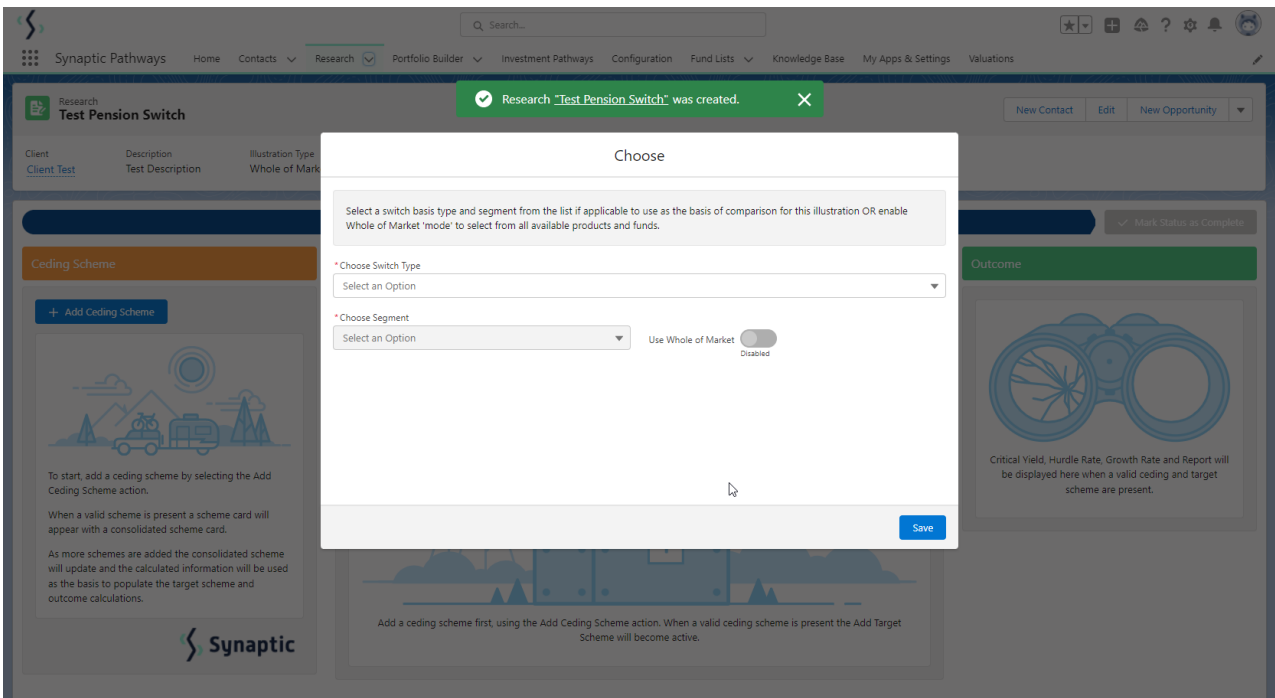
* Illustration Name

Description

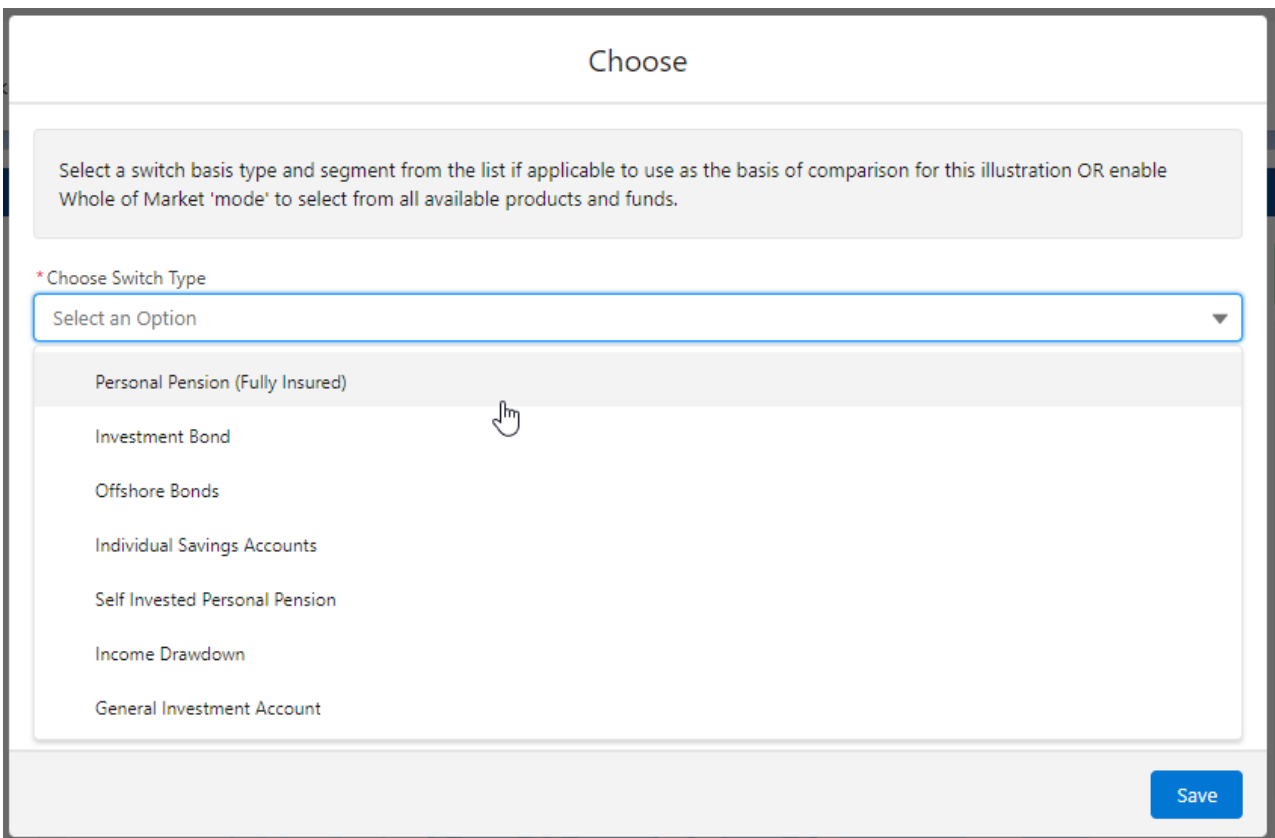
Activity Due Date

Illustration Typ

This will take you to the Choose screen:



Choose Switch Type:



If using a Central Investment Proposition, select a segment or click the **Use Whole of Market** button.

If both fields are greyed out (as see below) a CIP is not in use and whole of market will be used by default.

Choose

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

* Choose Switch Type
 Personal Pension (Fully Insured) ▼

* Choose Segment
 Select an Option ▼ Use Whole of Market Disabled

Save

This will take you into the Research screen:

The screenshot shows the Synaptic Research interface. At the top, there is a navigation bar with the Synaptic logo, a search bar, and various utility icons. Below the navigation bar, the main header displays 'Research Test Pension Switch 1' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. A table below the header lists details for the client 'Client Test', description 'Test Description', illustration type 'Whole of Market', and segment name.

The main content area is divided into three panels:

- Ceding Scheme:** Contains an '+ Add Ceding Scheme' button and an illustration of a landscape with a car and a house. Text below explains the process of adding and consolidating schemes.
- Target Scheme:** Contains an '+ Add Target Scheme' button and an illustration of a building and landscape. Text below explains that a target scheme becomes active after a ceding scheme is added.
- Outcome:** Contains an illustration of binoculars and text stating that 'Critical Yield, Hurdle Rate, Growth Rate and Report will be displayed here when a valid ceding and target scheme are present.'

The Synaptic logo is visible in the bottom left corner of the main content area.

For further information on Switch research, see articles:

[Switching - Creating in the research tab](#)

[Switching - Creating within a client record](#)

[Switching - Research Screen](#)

