

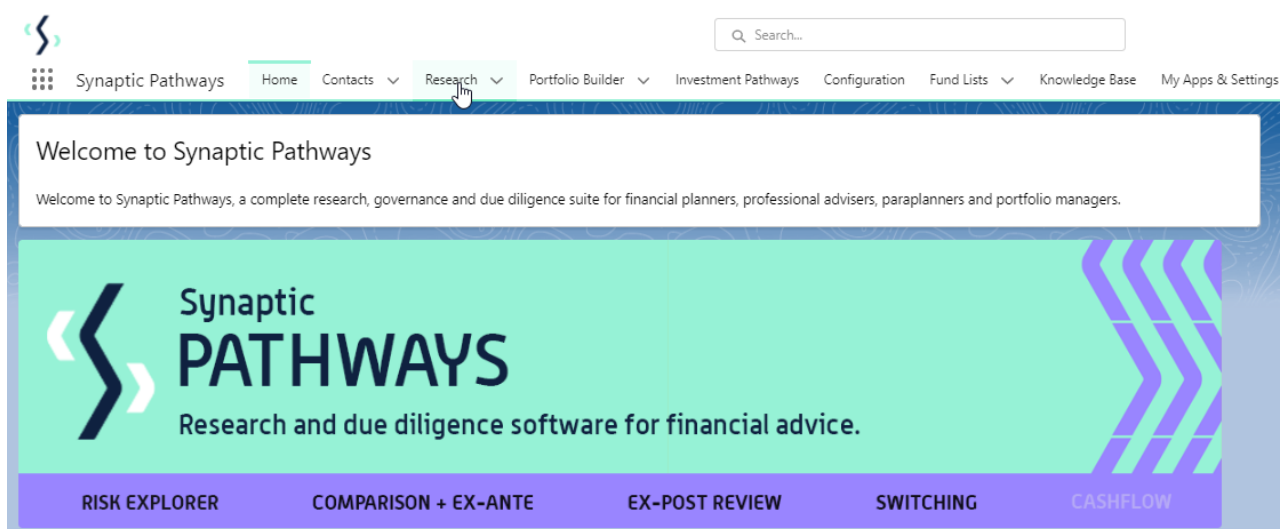
Switching - Creating in the research tab

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

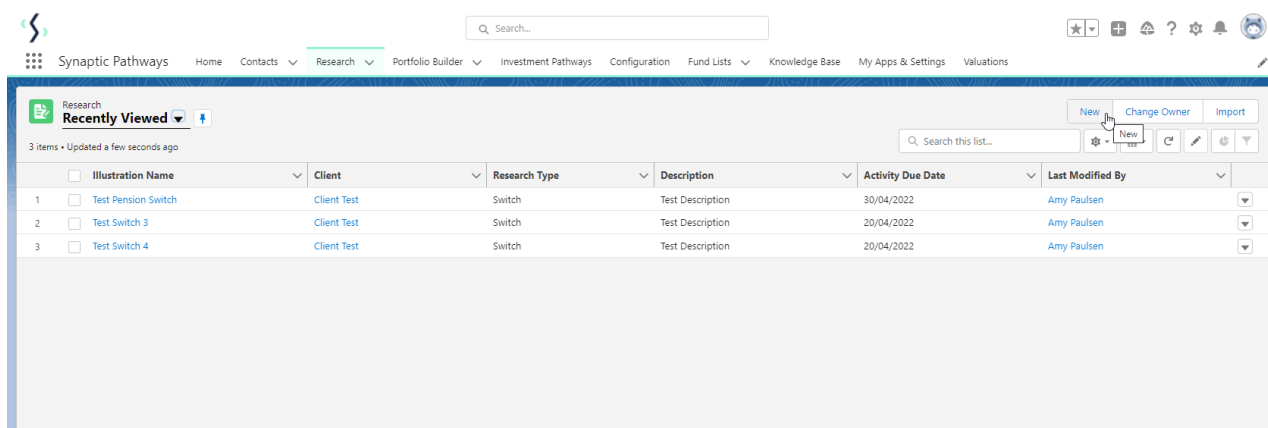
This article is a continuation of [Switching - Creating through the homepage](#)

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

To create Switching research in the Research tab, click into the tab from the Homepage:



All existing research will be listed. Click **New** to create 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.

As we have created research within the Research tab, you will need to search for the client:

New Research: Switch

Information

Client

Recent Contacts

- Client Test
- + New Contact

Activity Due Date

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 ↶
 📅

Save

This will take you to the Choose screen:

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
Select an Option ▼

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


[Save](#)

Choose a **Switch Type**:

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
Select an Option ▼

- Personal Pension (Fully Insured) 
- Investment Bond
- Offshore Bonds
- Individual Savings Accounts
- Self Invested Personal Pension
- Income Drawdown
- General Investment Account

[Save](#)

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 and a search bar. Below the navigation bar, the main content area is titled "Research" and "Test Pension Switch 1". The interface is divided into three main sections: "Ceding Scheme", "Target Scheme", and "Outcome".

- Ceding Scheme:** Contains an "Add Ceding Scheme" button and an illustration of a landscape with a house and trees. Text below the illustration explains that adding a ceding scheme will create a consolidated scheme card, which will be used to populate the target scheme and outcome calculations.
- Target Scheme:** Contains an "Add Target Scheme" button and an illustration of a landscape with a house and trees. Text below the illustration states that a ceding scheme must be added first for the target scheme to become active.
- Outcome:** Contains an illustration of binoculars and text stating that critical yield, hurdle rate, growth rate, and report will be displayed when a valid ceding and target scheme are present.

The Synaptic logo is visible in the bottom left corner of the Ceding Scheme section.

For further information on Switch research, see articles

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

