

Switching - Creating within a client record

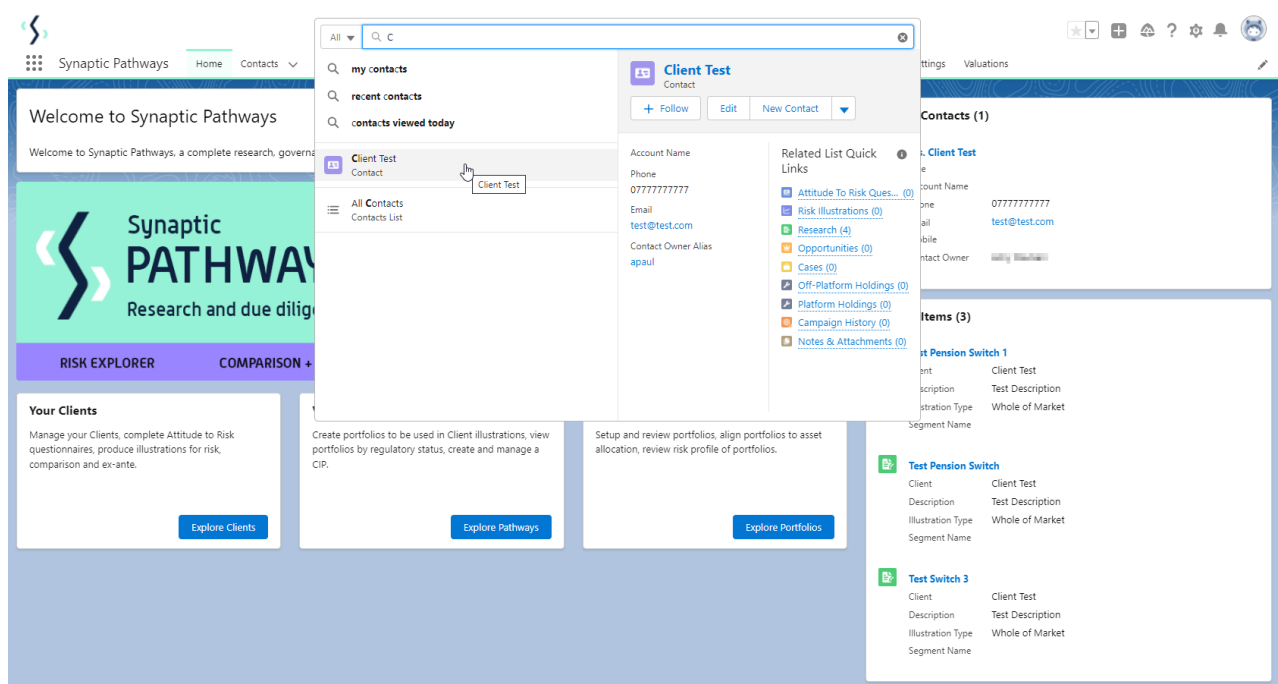
Last Modified on 27/04/2022 3:00 pm BST

This article is a continuation of [Switching - Creating in the research tab](#)

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

To create switching research within a contact record, either:

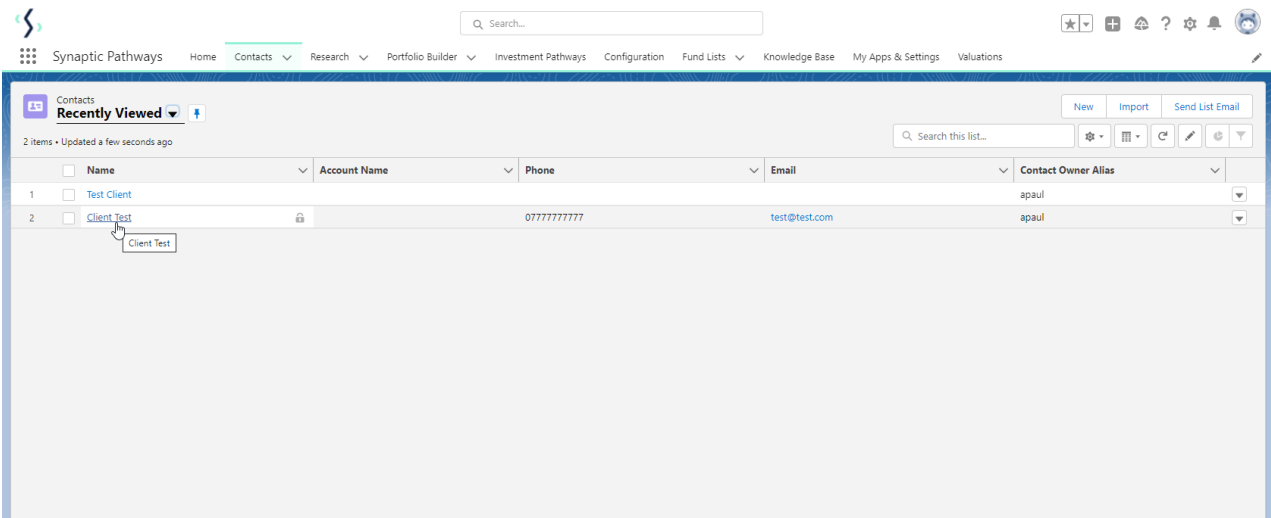
Search for the client in the top search bar:



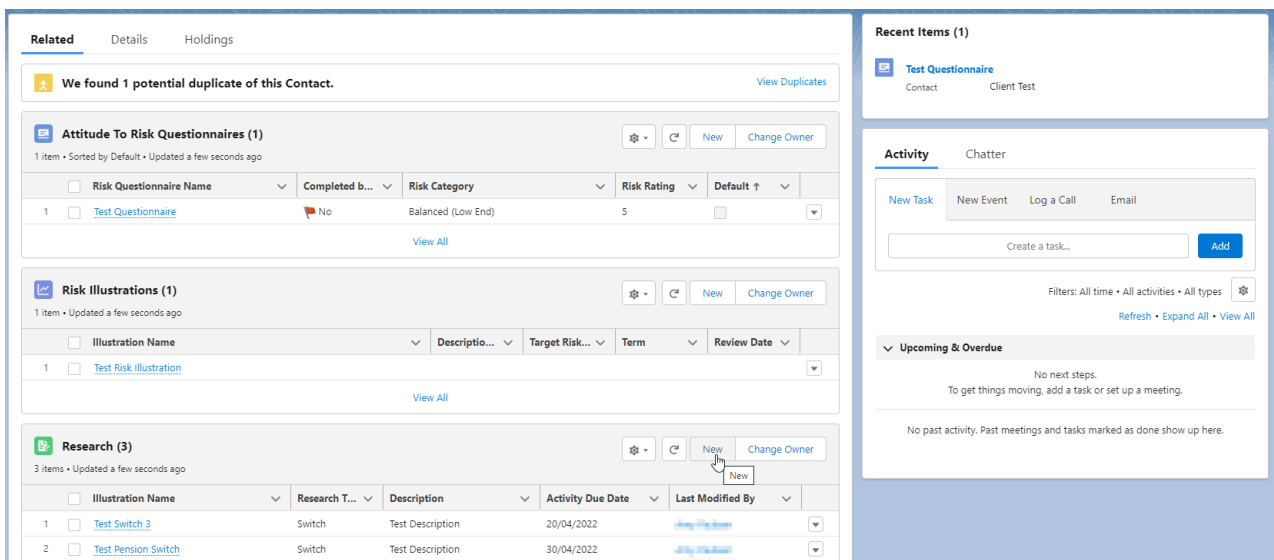
Alternatively, find the client within the **Contacts** tab:



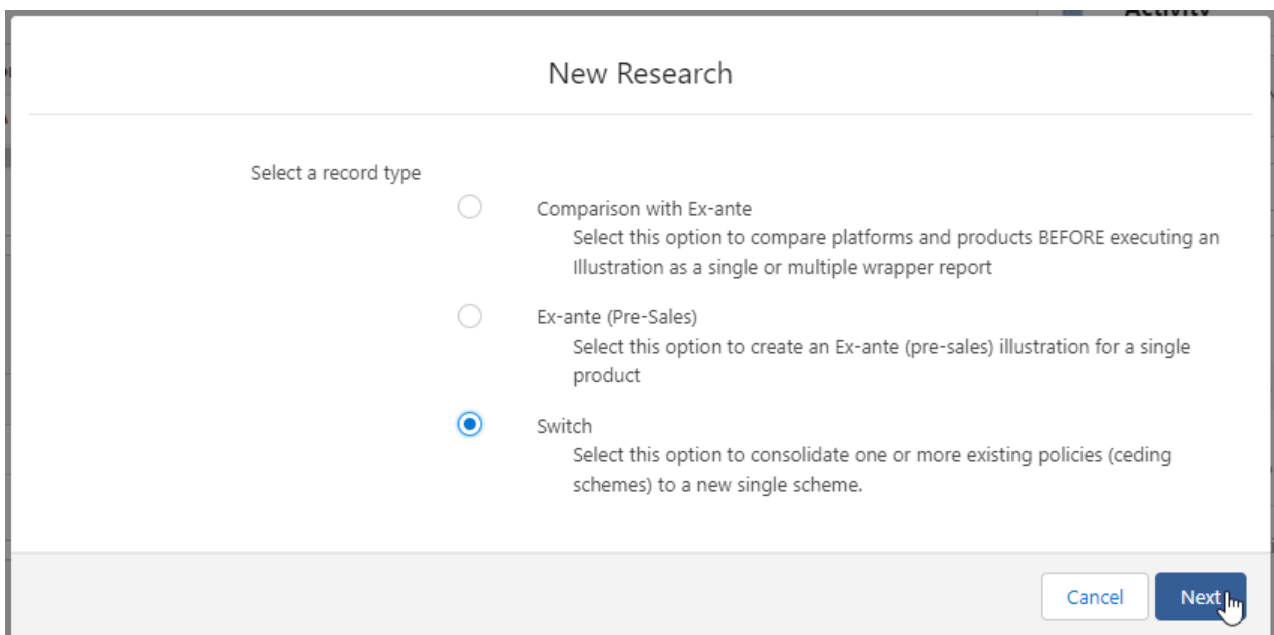
Select the client from the contact list:



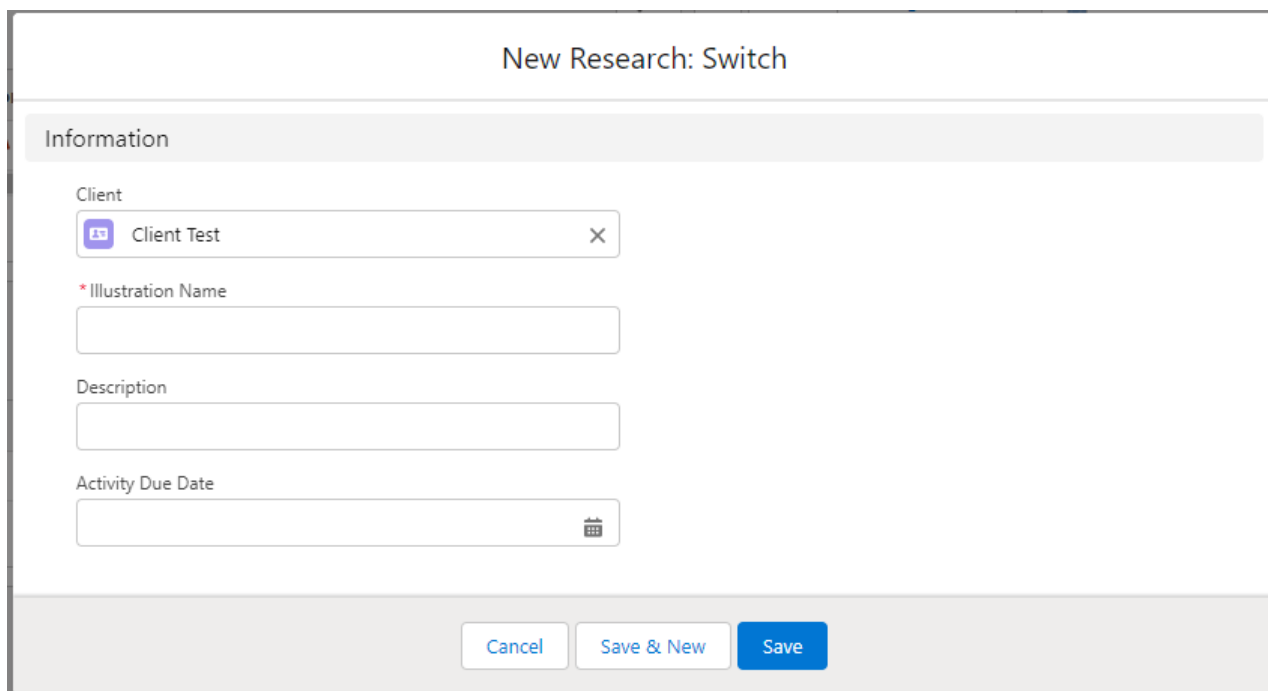
Click **New** within the Research area:



Click **Switch**:



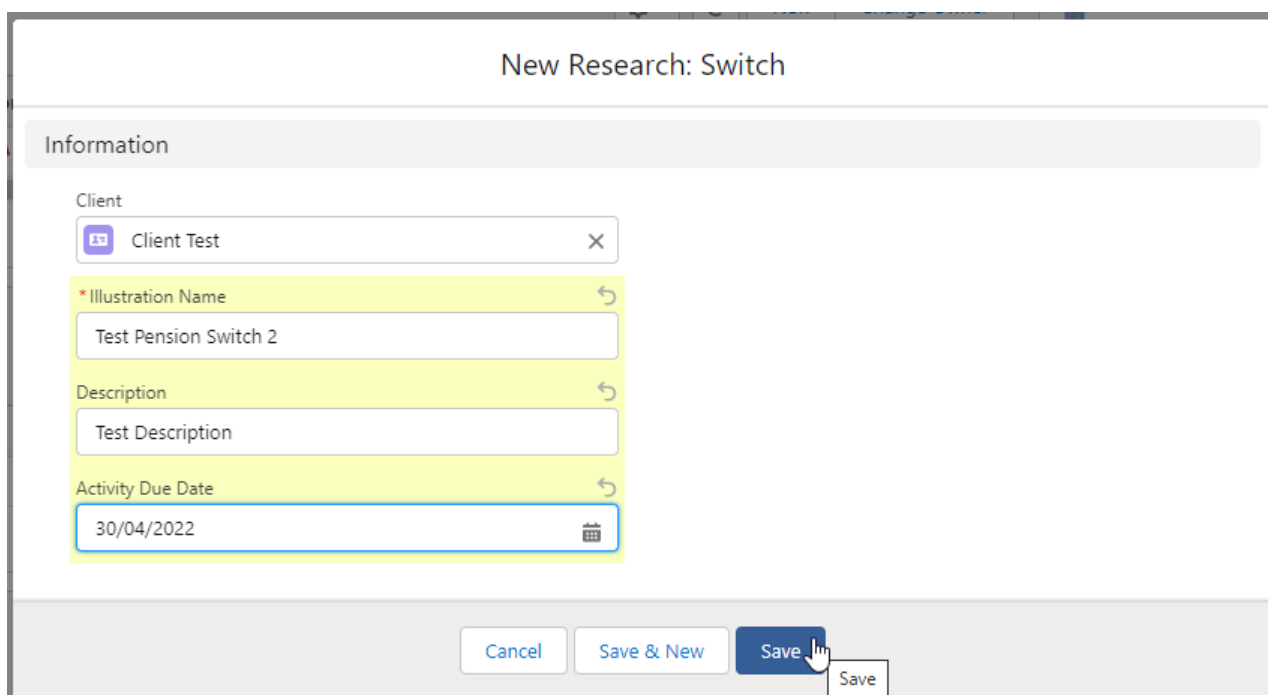
The client field will be populated automatically:



The screenshot shows a form titled "New Research: Switch" with an "Information" section. The "Client" field is populated with "Client Test". The "Illustration Name" field is empty, the "Description" field is empty, and the "Activity Due Date" field is empty with a calendar icon. At the bottom, there are three buttons: "Cancel", "Save & New", and "Save".

Note - **Client** field will not be completed if research has been created through the Research tab or Homepage.

Complete the remaining fields & **Save**:



The screenshot shows the same "New Research: Switch" form, but now all fields are filled. The "Illustration Name" field contains "Test Pension Switch 2", the "Description" field contains "Test Description", and the "Activity Due Date" field contains "30/04/2022". The "Save" button is highlighted with a mouse cursor, and a tooltip with the text "Save" is visible next to it.

Click into the Research:

Search...

Portfolio Builder Investment Pathways Configuration Fund Lists Knowledge Base My Apps

Research "Test Pension Switch 2" was created.

Research (4) 4 items • Updated a minute ago

Illustration Name	Research T...	Description	Activity Due Date	Last Modified By
1 Test Switch 3	Switch	Test Description	20/04/2022	Amy Paulsen
2 Test Pension Switch			30/04/2022	Amy Paulsen
3 Test Pension Switch 1			30/04/2022	Amy Paulsen
4 Test Pension Switch 2			30/04/2022	Amy Paulsen

Test Pension Switch 2

Client: Client Test

Description: Test Description

Illustration Type: Whole of Market

Segment Name:

Opportunities (0) [New](#)

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 for a client named 'Client Test'. The main title is 'Test Pension Switch 2'. Below the title, there are three tabs: 'Client Test', 'Test Description', and 'Whole of Market'. The 'Client Test' tab is active. The main content area is divided into three sections: 'Ceding Scheme', 'Target Scheme', and 'Outcome'. The 'Ceding Scheme' section has an orange header and contains a '+ Add Ceding Scheme' button, an illustration of a mountain landscape with a car and a house, and text explaining how to add a ceding scheme. The 'Target Scheme' section has a blue header and contains a '+ Add Target Scheme' button, an illustration of a mountain landscape with a building, and text explaining how to add a target scheme. The 'Outcome' section has a green header and 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 article [Switching - Research Screen](#)