

Switching - Creating within a client record

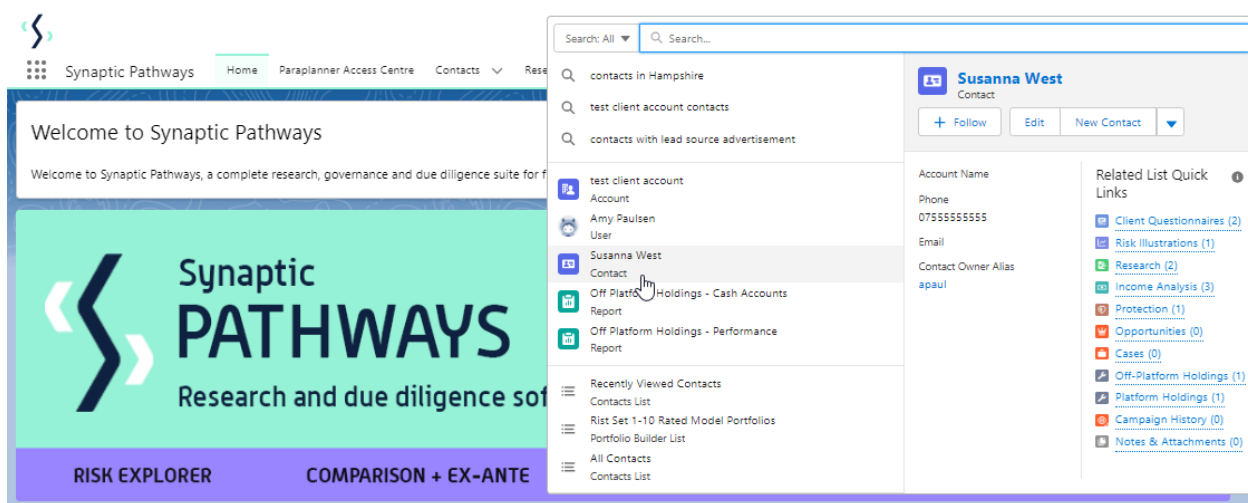
Last Modified on 13/02/2024 3:34 pm GMT

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

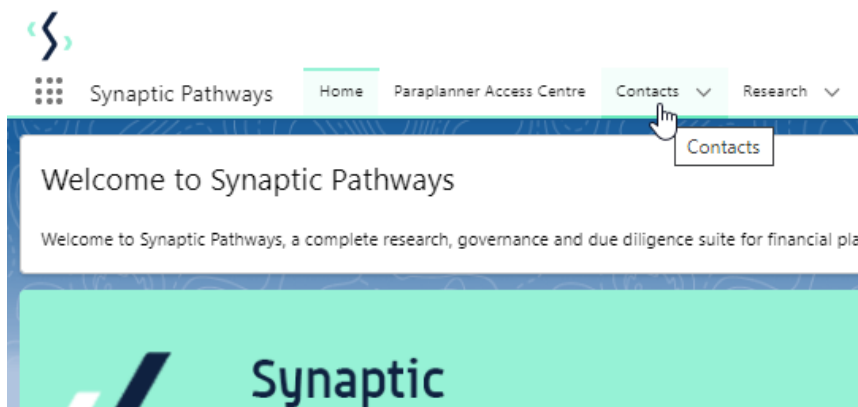
Switching Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create switching research within a contact record, either:

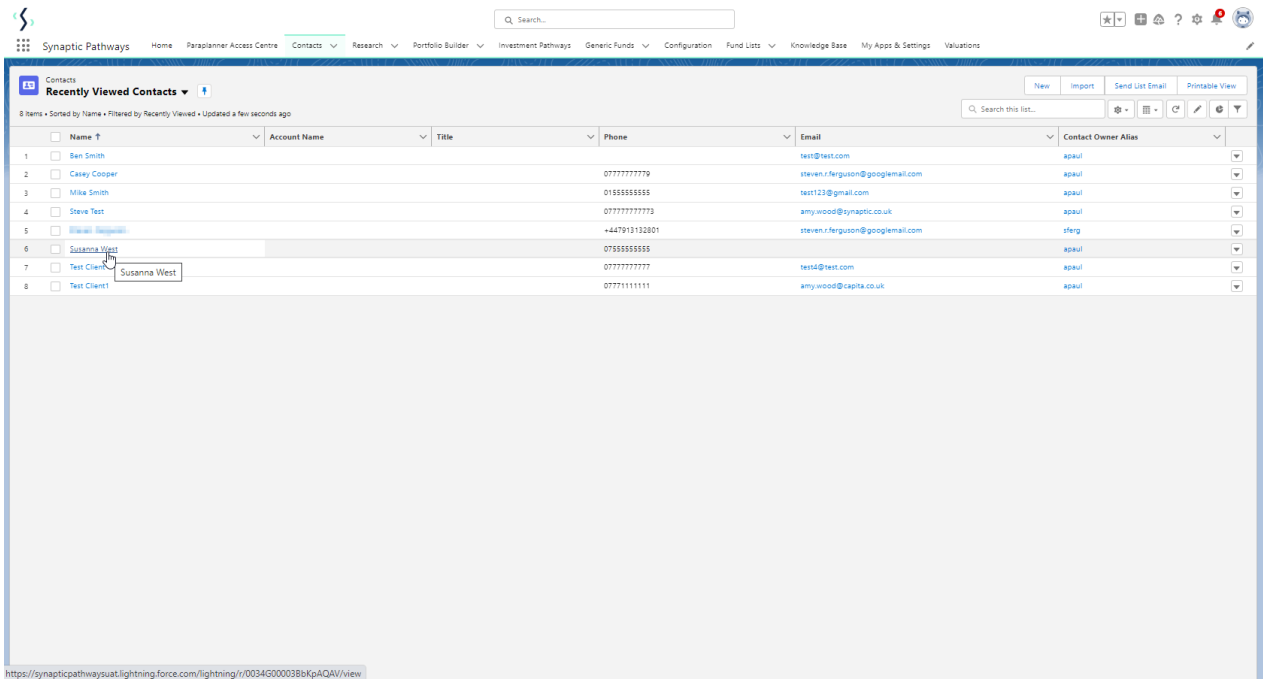
Search for the client in the top search bar:



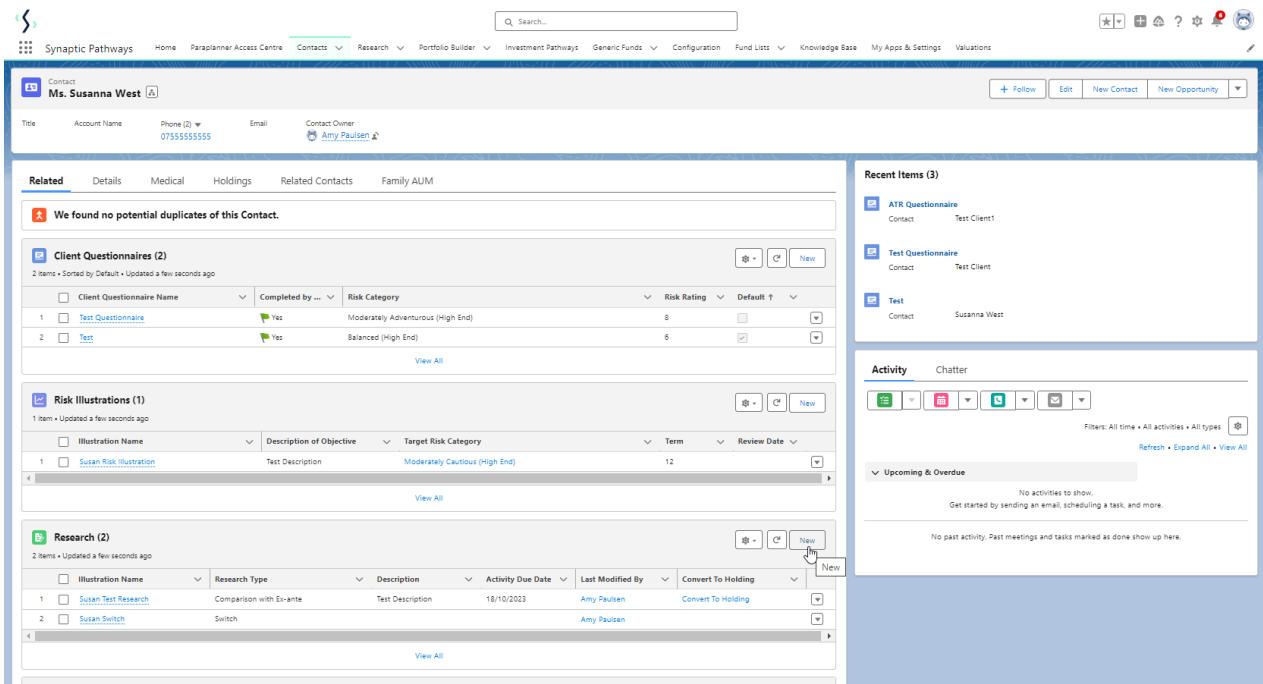
Alternatively, find the client within the **Contacts** tab:



Select the client from the contact list:



Click **New** within the Research area:



Click **Switch**:

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.

The client field will be populated automatically:

New Research: Switch

* = Required Information

Information

Client

* Illustration Name

Description

Activity Due Date

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

Complete the remaining fields & **Save**:

New Research: Switch

* = Required Information

Information

Client ↶

* Illustration Name ↶

Description ↶

Activity Due Date ↶

Cancel Save & New Save

Click into the Research:

Research (4) ⚙️ ↻ New Change Owner

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

- Investment Bond
- Offshore Bonds
- Individual Savings Accounts
- Income Drawdown
- General Investment Account
- Pensions

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 various menu items like 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', etc. Below this is a search bar and utility icons. The main content area is titled 'Research' and 'Test Pension Switch 2'. It features a table with columns for Client (Susanna West), Description (Text Description), Illustration Type (Whole of Market), Segment Name, and Policy Type (Pensions). Below the table are three panels: 'Ceding Scheme' (orange header), 'Target Scheme' (blue header), and 'Outcome' (green header). Each panel contains an illustration and instructions on how to add or activate a scheme. The Synaptic logo is visible in the bottom right of the Ceding Scheme panel.

For further information on Switch research, see article [Switching - Research Screen](#)