

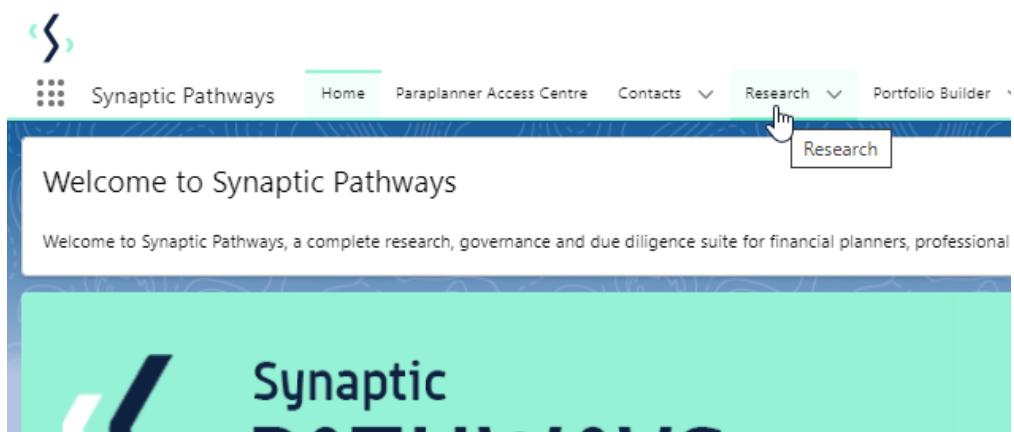
Switching - Creating in the research tab

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

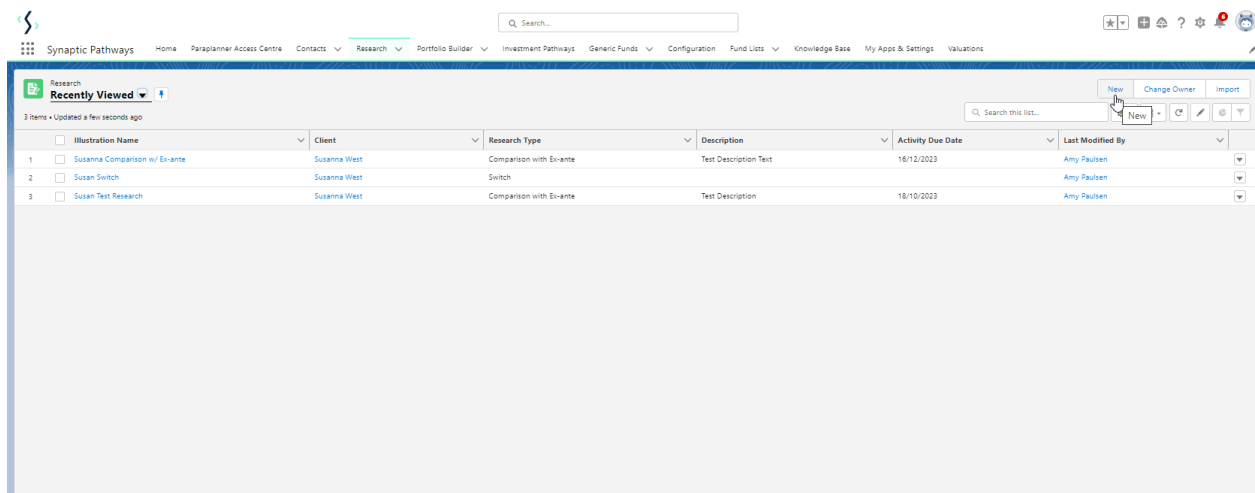
This article is a continuation of [Switching - Creating through the homepage](#)

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

* = Required Information

Information

Client

Search Contacts...

Recent Contacts

- Susanna West
- Test Client1
- Test Client
- Steve Test
- Ben Smith
- + New Contact

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

Complete the remaining fields:

New Research: Switch

* = Required Information

Information

Client ↶
ED Susanna West ×

* Illustration Name ↶
Test Pension Switch 1

Description

Activity Due Date

Cancel Save & New Save

Save:

New Research: Switch

* = Required Information

Information

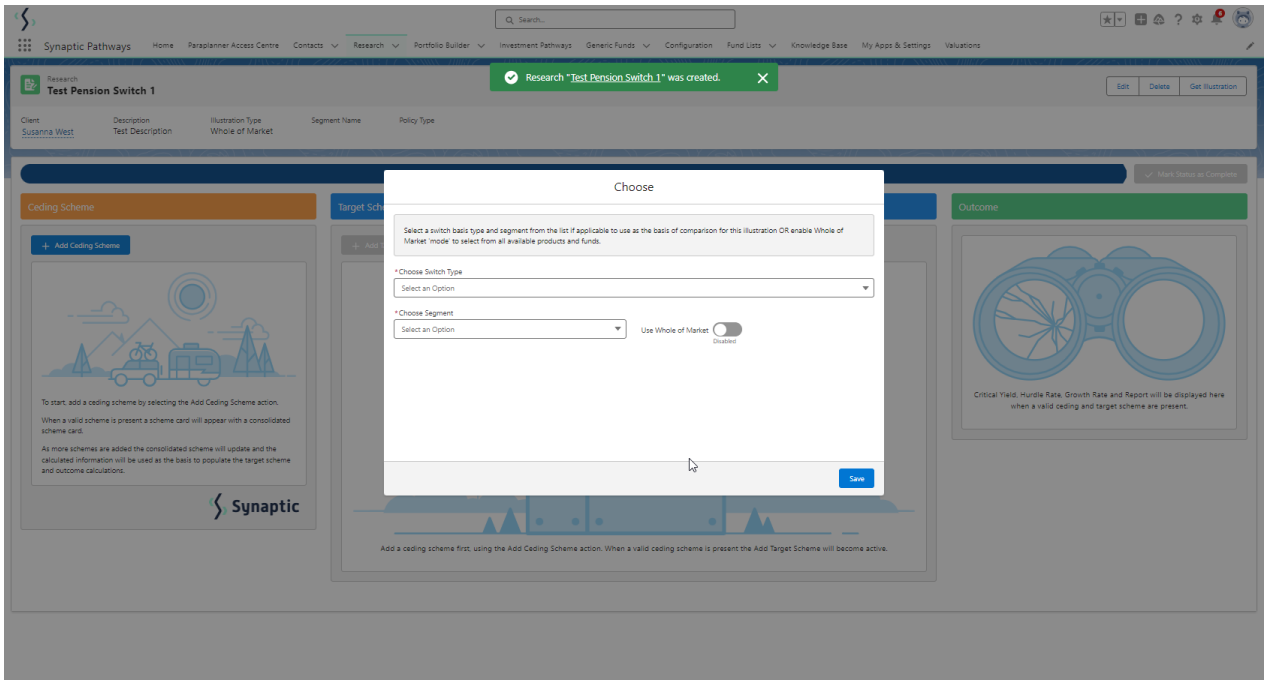
Client ↶
ED Susanna West ×

* Illustration Name ↶
Test Pension Switch 1

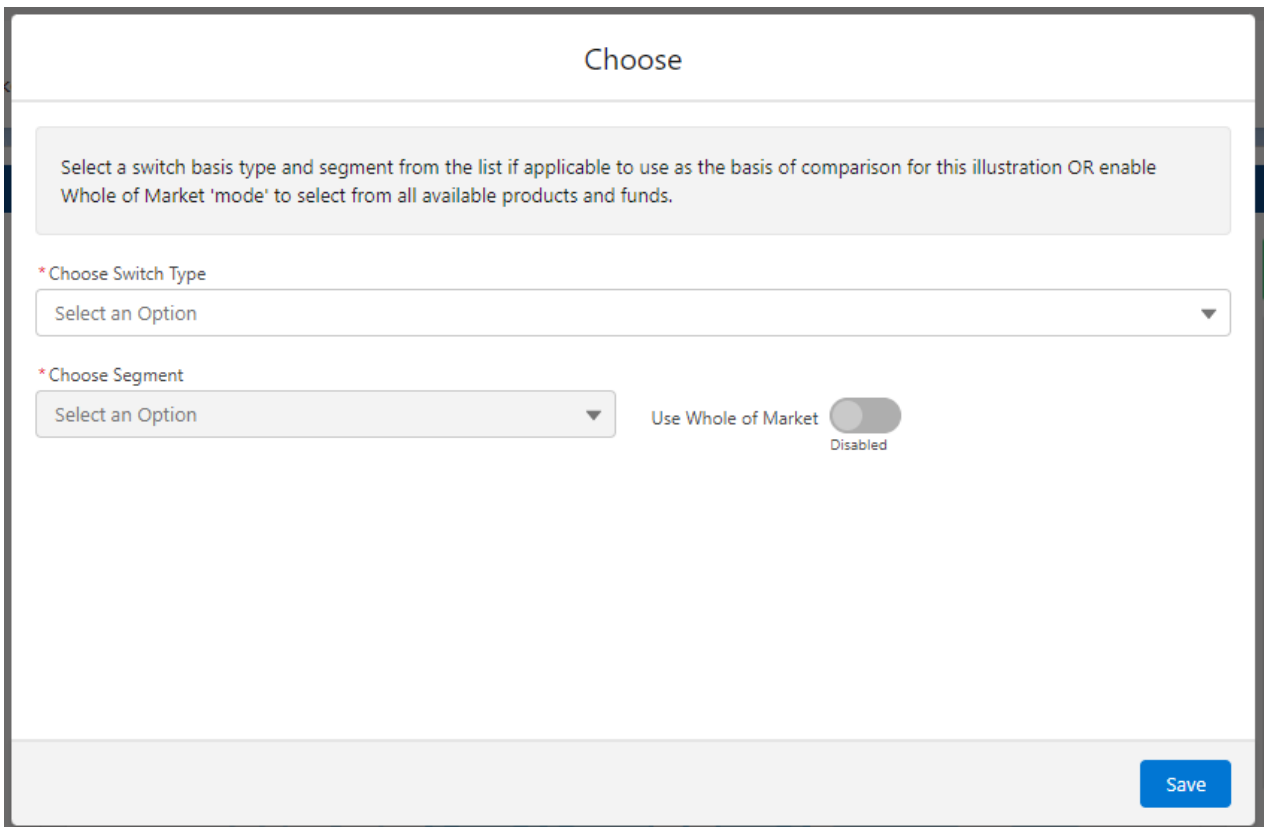
Description ↶
Test Description

Activity Due Date ↶
06/12/2023 📅

Cancel Save & New Save Save



This will take you to the Choose screen:



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:

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Search...


Research **Test Pension Switch 1** Edit Delete Get Illustration

Client	Description	Illustration Type	Segment Name	Policy Type
Susanna West	Test Description	Whole of Market		Pensions


Research Mark Status as Complete

Ceding Scheme

+ Add Ceding Scheme

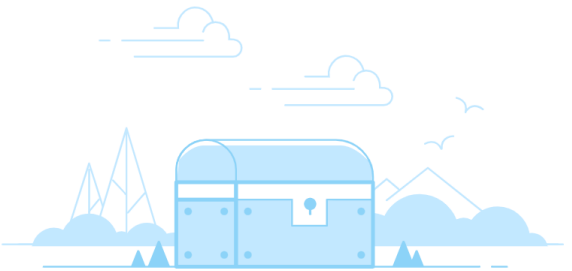


To start, add a ceding scheme by selecting the Add Ceding Scheme action. When a valid scheme is present a scheme card will appear with a consolidated scheme card. As more schemes are added the consolidated scheme will update and the calculated information will be used as the basis to populate the target scheme and outcome calculations.



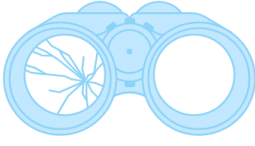
target Scheme

+ Add Target Scheme



Add a ceding scheme first, using the Add Ceding Scheme action. When a valid ceding scheme is present the Add Target Scheme will become active.

Outcome



Critical Yield, Hurdle Rate, Growth Rate and Report will be displayed here when a valid ceding and target scheme are present.

For further information on Switch research, see articles

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

[Switching - Research Screen](#)