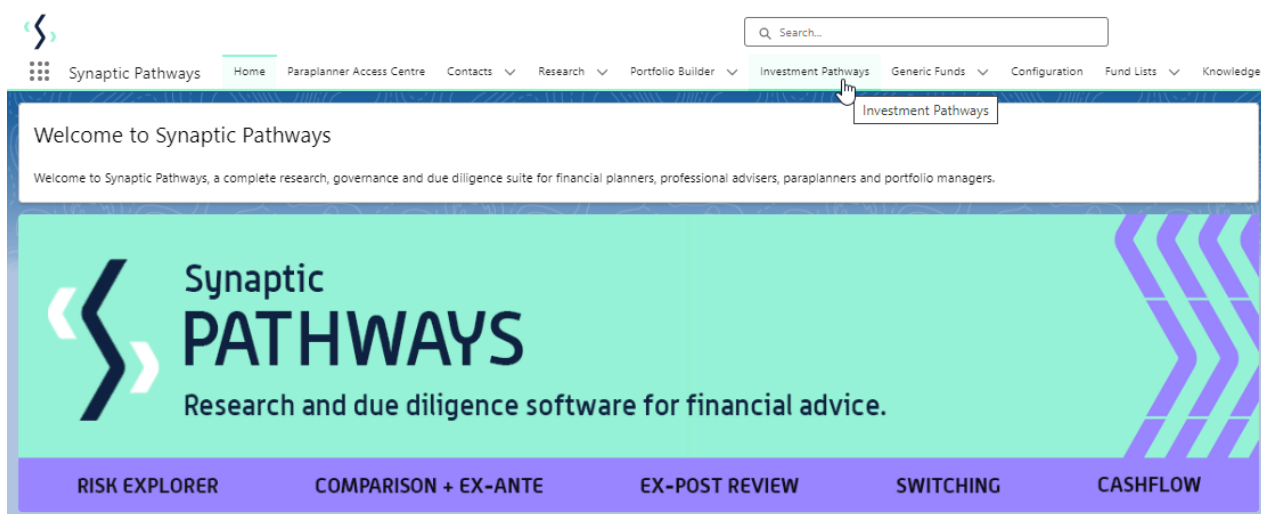


I have created a Central Investment Proposition, but I cannot see it's reflected in the research?

Last Modified on 18/10/2023 12:53 pm BST

You will need to make sure the Central Investment Proposition is set to active.

Navigate to **Investment Pathways:**



In the Central Investment Proposition area, find the record you have created.

If the Active column shows the CIP as Inactive, you will need to activate this for it to be reflected in the research.

Name	Description	Active	Last Modified	Owner
Central Investment Proposition Sep23	Test CIP	No	20/09/2023: 09:46	Amy Paulsen
P1 test		No	06/10/2023: 14:44	Ellen Ahcroft
Test CIP	Test CIP Description	No	18/10/2023: 12:51	Amy Paulsen
Sebs Test		No	04/10/2022: 13:53	Seb Marshall
abrdn		No	17/12/2022: 02:24	John Warby
Commodore	Commodore CIP	No	24/03/2023: 02:25	John Warby
Test CIP	This is a test CIP, please do not delete - I will set it to inactive wh...	No	24/03/2023: 02:25	Rahul Gupta
Test		No	24/03/2023: 02:25	Stu Horne
Test		No	25/07/2022: 12:47	Ami Thakar

On the right side of the record, click into the dropdown arrow:

Name	Description	Active	Last Modified	Owner
Central Investment Proposition Sep23	Test CIP	No	20/09/2023: 09:46	Amy Paulsen
P1 test		No	06/10/2023: 14:44	Ellen Ahcroft
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Test		No	24/03/2023: 02:25	Stu Horne
Test		No	25/07/2022: 12:47	Ami Thakar

The dropdown menu for the 'Test CIP' record is open, showing options for Edit and Delete.

tick the Mark Active box:

New Central Investment Proposition(CIP)

* CIP Name
Test CIP

CIP Description
Test CIP Description

Mark Active

Cancel Save

Save:

Edit Central Investment Proposition(CIP)

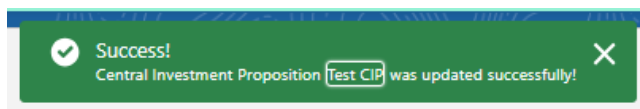
* CIP Name
Test CIP

CIP Description
Test CIP Description

Mark Active

Cancel Save

Once saved, a success message will appear:



When creating your research, you will either be able to select your chosen segment or you will see the segment in the summary bar at the top of the screen:

Choose

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

* Choose Segment

Test Segment 1

Use Whole of Market Disabled

- ✓ Test Segment 1
- Segment CIP 2

Research			
Test Client Illustration			
Client	Description	Illustration Type	Segment Name
Test Client		Segment	Test Segment 1

Please note - It is worth making sure your segment names are unique to the CIP, if you have multiple CIPs with similar segments, you may not be able to differentiate between them