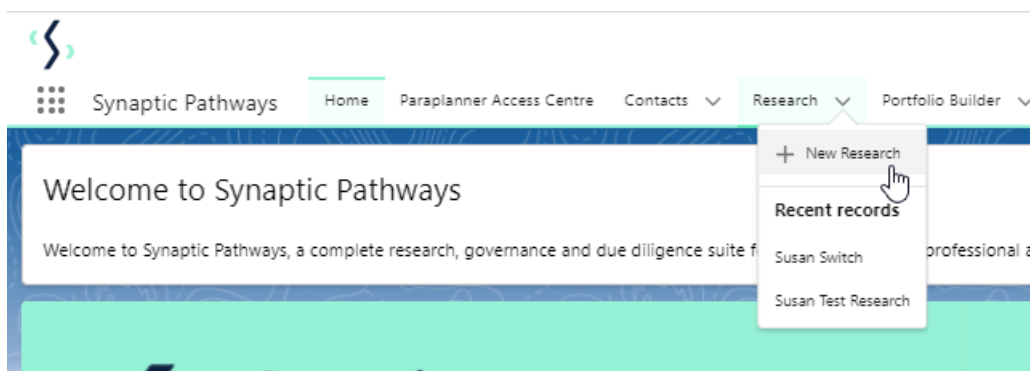


Switching - Creating through the homepage

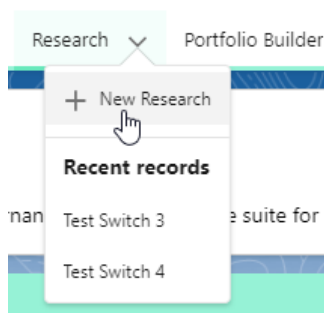
Last Modified on 16/10/2023 4:27 pm BST

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

To create switching research directly from the Homepage, hover over the Research tab and select the down arrow:



Select **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.

[Cancel](#) [Next](#)

As we have created the research directly from the homepage, you will need to search for the client:

New Research: Switch

* = Required Information

Information

Client

Search Contacts...

Recent Contacts

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

[Cancel](#) [Save & New](#) [Save](#)

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 ↶
ES3 Susanna West ✕

* Illustration Name ↶
Test Pension Switch

Description
|

Activity Due Date

Cancel Save & New Save

Save:

New Research: Switch

* = Required Information

Information

Client ↶
ES3 Susanna West ✕

* Illustration Name ↶
Test Pension Switch

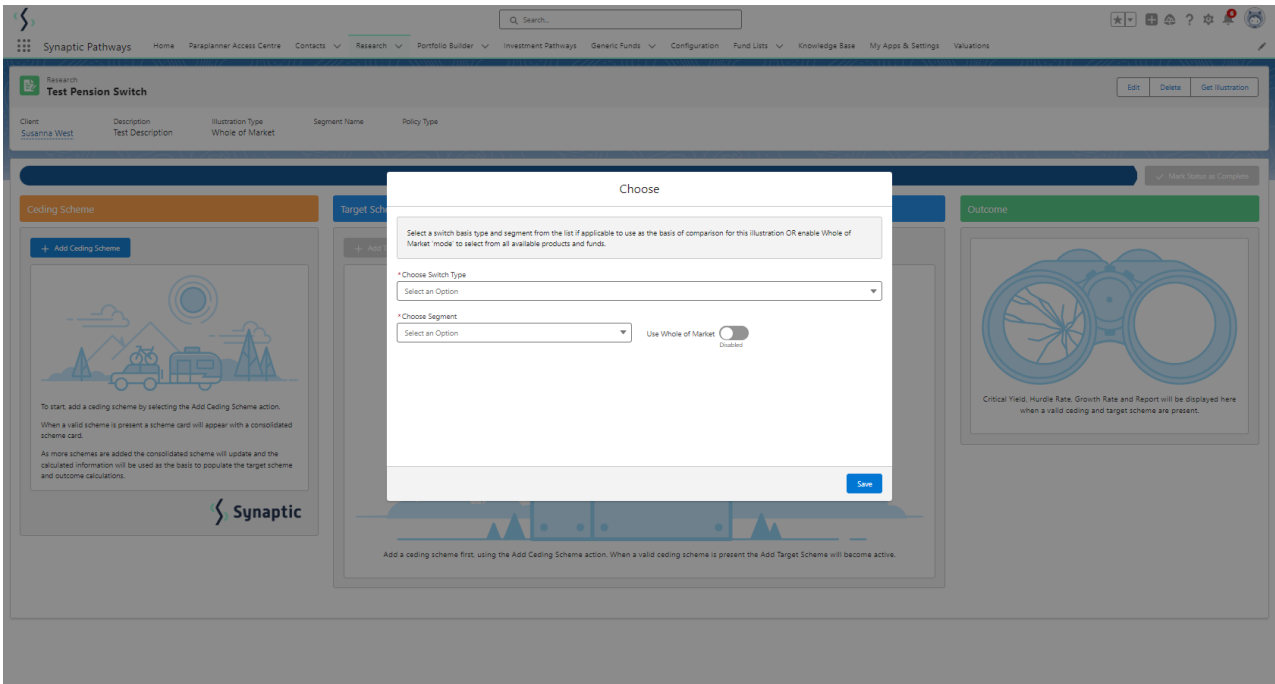
Description ↶
Test Description

Activity Due Date ↶
29/12/2023 📅

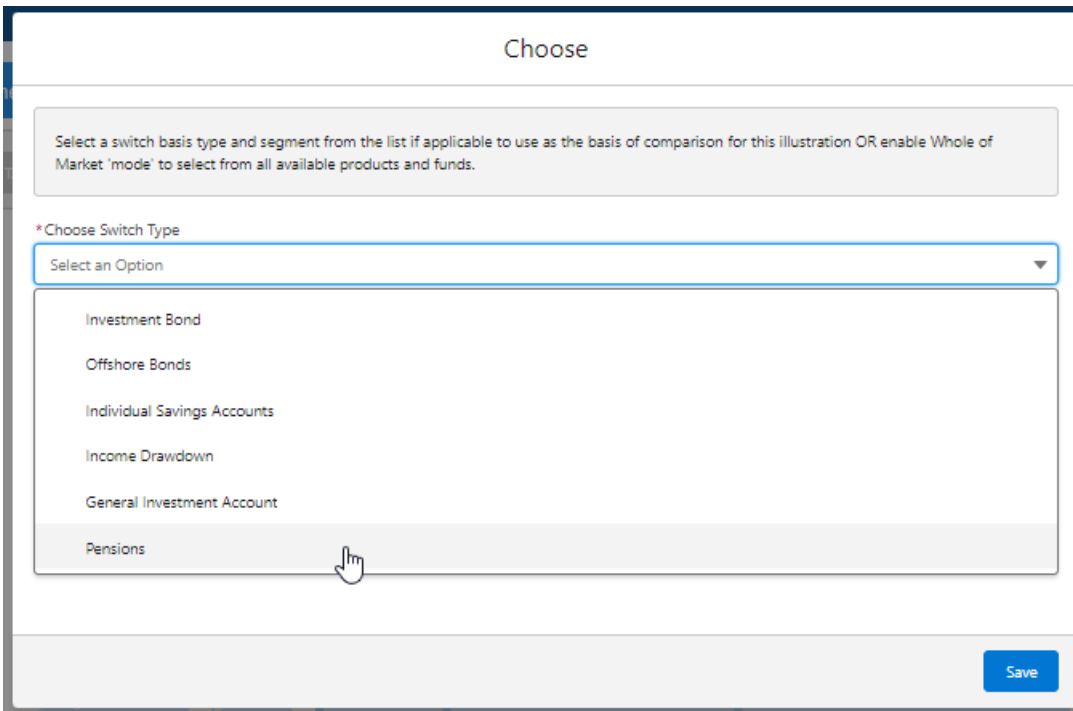
Cancel Save & New Save Save

✔ Research "Test Pension Switch" was created. ✕

This will take you to the Choose screen:



Choose Switch Type:



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 'Test Pension Switch'. The top navigation bar includes 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. A search bar is located in the top right. The main content area is titled 'Research' and includes a 'Mark Status as Complete' button. The interface is divided into three main sections: 'Ceding Scheme' (orange header), 'Target Scheme' (blue header), and 'Outcome' (green header). The 'Ceding Scheme' section contains an 'Add Ceding Scheme' button and a card with instructions: '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.' The 'Target Scheme' section contains an 'Add Target Scheme' button and a card with instructions: '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.' The 'Outcome' section contains a graphic of binoculars and text: '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 in the research tab](#)

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

[Switching - Research Screen](#)