Switching - Creating within a client record

Last Modified on 16/10/2023 4:37 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:

Synaptic Pathways Home Paraplanner Access Co	antre Contacts V Research V Portf	Q. Search	eneric Funds V Configuration Fund Lists V	Knowledge Base My Apps & Settings Va	大王 日本 ? 卒 ·	e 🗟
Contacts Contacts Recently Viewed Contacts I I I I I I I I I I I I I I I I I I I	ondi ago	1987 - 1988-244 (- 777) 1987 - 1988-244 (- 777)	Zes III (TE SSANCEIMHEZ — 11945)	111. <i>7717</i> 510377 Semit	Mill Mew Import Send Ust Email Printab Q, Search this list \$ •] \$ •] \$ •] \$ C] \$ / \$ \$ / \$] \$ •] \$ C] \$ / \$]	le View
Name 🕇 🗸 🗸	Account Name 🗸	Title	Phone N	Email	✓ Contact Owner Alias	~
1 Ben Smith				test@test.com	apaul	
2 Casey Cooper			0777777779	steven.r.ferguson@googlemail.com	apaul	
3 Mike Smith			0155555555	test123@gmail.com	apaul	
4 Steve Test			07777777773	amy.wood@synaptic.co.uk	apaul	
5			+447913132801	steven.r.ferguson@googlemail.com	sferg	
6 Susanna West			0755555555		apaul	
7 Test Client Susanna West			07777777777	test4@test.com	apaul	
8 Test Client1			07771111111	amy.wood@capita.co.uk	apaul	
https://synapticpathwaysuat.lightning.force.com/lightning//103	4G00003BbKpACAX/view					

Click **New** within the Research area:

CQ. Search	😢 🖬 🕼 ? 🔅 🧟 🕅
Contact Ms. Susanna West The Account Name Prove 20 × Email Contact Owner Mary Paulatin g	+ Polow Edit New Contact New Opportunity V
Related Details Medical Holdings Related Contacts Family AUM S We found no potential duplicates of this Contact.	Recent Items (3) ATR Questionnaire Contact Tes Client
Client Questionnaires (2) Item: - Some by Oxfult - Vojded 3 five second: apo Completed by V Risk Category V Risk Rating V Default ? V Default ? Moseracely Adventurous (High End) 0	Test Questionnaire Contact Test Contact Test Contact Sustaina West
2 test Ver All 6 C 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Activity Chatter
Illustration Name Description of Objective Target Risk Category V Term Review Date 1 Scraw Risk Illustration Test Description Moderanely Cautious (High End) 12 V 4 View All View All View All View All View All	Filters: All time + All activities + All types 🔮 Refersh + Expand All + Verr All Upcoming & Overdue No activities to show. Get started by reading an email, activitieg a task, and more.
Research (2) @	No past activity. Past meetings and tasks marked as done show up here.
1 Sustain Test Research Comparison with Ex-ante Test Description 18/10/2023 Amy Paulaen Convert To Holding Image: Convert To Holding 2 Sustain Switch Switch Amy Paulaen Image: Convert To Holding Image: Convert To Holding 4 View AS	

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
0	Ex-ante (Pre-Sales) Select this option to create an Ex-ante (pre-sales) illustration for a single product
۲	Switch Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.
	Cancel

The client field will be populated automatically:

	New Research: Switch	
		* = Required Information
Information		
Client Susanna West * Illustration Name	ک	
Description C Activity Due Date		
	Cancel Save & New Save	

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

Complete the remaining fields & **Save**:

		* = Required Information
formation		
Client	5	
💷 Susanna West	×]	
* Illustration Name	5	
Test Pension Switch 2]	
Description	5	
Test Description]	
Activity Due Date	5	
06/12/2023		

Click into the Research:

	Illustration Name	\sim	Research T $ \smallsetminus $	Description	\sim	Activity Due Date 🛛 🗸	Last Modified By	\sim
1	Test Switch 3		Switch	Test Description		20/04/2022	Amy Paulsen	
2	Test Pension Switch	🚯 Test Pe	Test Pension Switch 2			30/04/2022	Amy Paulsen	
3	Test Pension Switch 1					30/04/2022	Amy Paulsen	
4	Test Pension Switch 2	Client Client Test	Descript Test Des			30/04/2022	Amy Paulsen	
	\bigcirc	Illustration Type Whole of Market	Segmen					

This will take you to the Choose screen:

(Choose
Select a switch basis type and segment from the list if applical Whole of Market 'mode' to select from all available products a	able to use as the basis of comparison for this illustration OR enable 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					
Offshare Bonds					
Individual Savings Accounts					
Income Drawdown					
General Investment Account					
Pensions (m)					
sa	we				

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.

	Ch	oose	
Select a switch basis type and segment from the list if applic Whole of Market 'mode' to select from all available products		o use as the basis of comparison for this illustration OR enable 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	Q. Sarch Portfolio Builder V Investment Pathways Generic Funds V Configuration Fund Lists V Knowledge Base My Apps & Settings	🖈 🖿 📾 🖓 🌣 🧟 Valuations
Research Test Pension Switch 2	zzestna (zwone dodze z dowadni z zrzestna (z wone dodze z dowad i zrzestna (zwo	Est Delete Get Illustration
Client Description Illutration Type Segm Suzanna West Test Description Whole of Market	ret fame Policy Type Persions	
	Research	Mark Status as Complete
Ceding Scheme	Target Scheme	Outcome
<section-header><section-header><section-header><section-header><section-header><image/><text><text><text></text></text></text></section-header></section-header></section-header></section-header></section-header>	A tableballs	Critical Valids, Horade Rates, Greech Rate and Rapport will be displayed here where valid coding and target tohere are present.

For further information on Switch research, see article Switching - Research Screen