Switching - Creating within a client record

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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	entre Contacts V Research V Portf	Q, Search	eneric Funds v Configuration Fund Lists v	Knowledge Base My Apps & Settings N	kiustions	e 👂 👼
Contacts Contacts Recently Viewed Contacts F Items - Sorted by Name - Filtered by Recently Viewed - Updated a few sec	0000110-22223-1110-220000 oondi ago	85 MBU (7777) 1885-288 (7777)	25 IET (SSMC)////// 1985		New Import Send List Email Prir Q. Search this list \$ • \$ \$ • \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	table View
Name 🕈 🗸 🗸	Account Name 🗸	Title	/ Phone	/ 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	V
4 Steve Test			07777777773	amy.wood@synaptic.co.uk	apaul	
5			+447913132801	steven.r.ferguson@googlemail.com	sferg	V
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	V
https://gynapticpathwaysuat.lightning.force.com/lightning/r/03	4G00003BbKp4QAV/view					

Click **New** within the Research area:

CQ. Search	😢 🖬 🕼 ? 🌣 🦧 🐯
Tes Account Name Prome 20 ¥ Email Contract Owner Tes Account Name Prome 20 ¥ Email Contract Owner	+ Polow Edit New Contact New Opportunity V
Related Details Medical Holdings Related Contacts Family AUM S We found no potential duplicates of this Contact. S	Recent Items (3) ATR Questionnaire Contact Tes Client
Client Questionnaires (2) Item: - Some by Orthult - Vojdend 3 five second: apo Client Questionnaire Name Completed by V Risk Category Risk Rating V Default ? V Default ? V Moderazely Adventurous (High End) 0	Test Questionnaire Contact Test Contact Test Contact Sustaina West
2 tes ve balance (High Erd) 6 ⊮ v View All tem - Loband a fine second ago	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 (1) Referent + Expand All + View All Upcoming & Overdue No activities to thom. Get started by sending an email, scheduling a task, and more.
Research (2)	No past activity. Past meetings and tasks marked as done show up here.
1 Jostan test desarrom Comparison with Exame Test Description 18/10/2023 Amp Paulsen Convert To Holding Imp 2 States Tests Switch Amp Values Imp Imp 4 View All Imp Imp Imp	

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:

tems • Up	pdated a minute ago	~	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	Test Pe	ension Switch	2 ×		30/04/2022	Amy Paulsen		Ţ
3	Test Pension Switch	1				30/04/2022	Amy Paulsen		
4	Test Pension Switch	2 Client Client Test	Descript Test Des	tion		30/04/2022	Amy Paulsen		v
	\bigcirc	Illustration Type Whole of Market	Segmen	it Name					

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 Im	
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.

	Ch	oose	
Select a switch basis type and segment from the list if applic Whole of Market 'mode' to select from all available products	able t and	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 (zwony doniz – dowadni zzozestna (zwony doniz – dowadni zzozestna (zwony	Est Delete Get Illustration
Client Description Illustration Type Segm Susanna West Test Description Whole of Market	net Hanna – Policy Type Pensions	
	Research	✓ Mark Status as Complete
Ceding Scheme	Target Scheme	Outcome
<section-header></section-header>	A tagen some	Critical Yalak, Horade Rates, Greech Rate and Rapport will be displayed here when a valid cedling and target toheres are present.

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