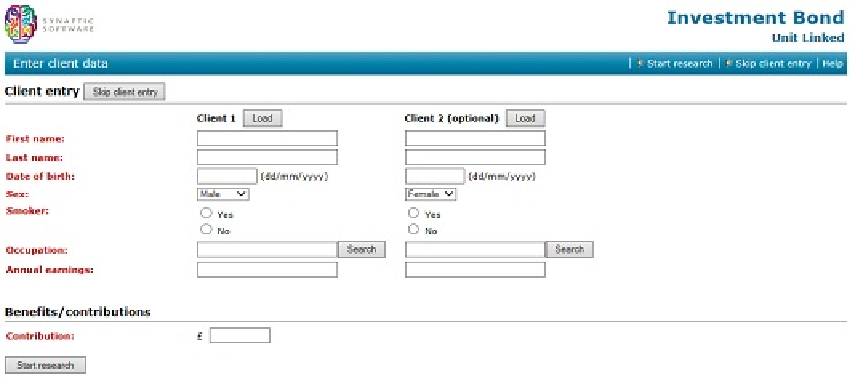
How do I start a piece of research?

Last Modified on 10/01/2024 12:36 pm GMT

You start a new piece of research by choosing a product type on the software’s Home page.

This displays the client-entry screen illustrated by the first screenshot. You can then choose between two types of research:



.

- “Client-focused” – i.e. research into a specific recommendation for a client. You fill in the client’s details, and any benefits/contributions which are relevant to the policy, and then click on the **Start research** button.·
- “Product-focused” – i.e. general research into the features of the contracts available on the market. Client and benefit details are not relevant in product-focused research, so you simply click on the **Skip client entry** button.

  The differences between client-focused and product-focused research are described in the next section.

  ### Entering client and benefit details

When the client-entry screen doesn’t appear

There are two circumstances under which the client-entry screen does **not** appear, and you are instead taken straight to the research grid when you choose the product type to research:

· Your firm has not paid for the client-focused functionality of Synaptic Research. Please contact your Synaptic account manager if you want to upgrade your licence.

You have chosen to do research into all bases of a product type. This sort of research can only be done in product-focused mode, and therefore the software does not give you the option of entering client details.