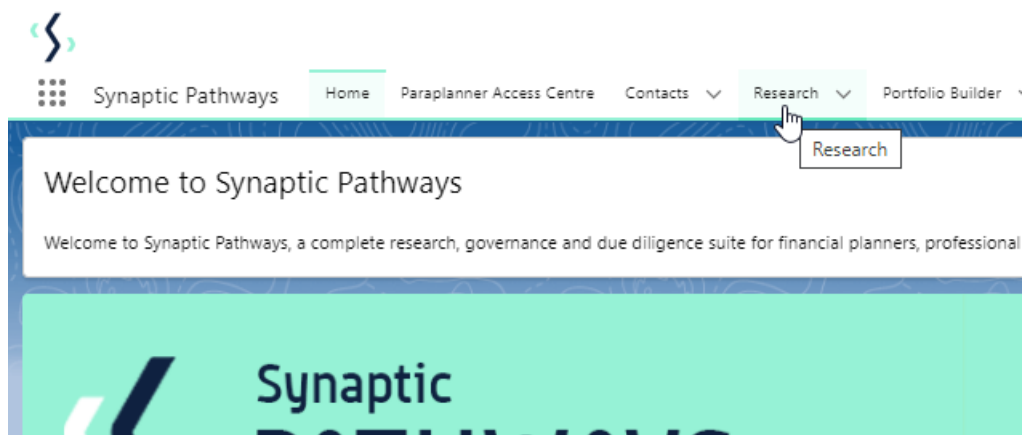


Comparison & Ex-Ante - Creating in the research tab

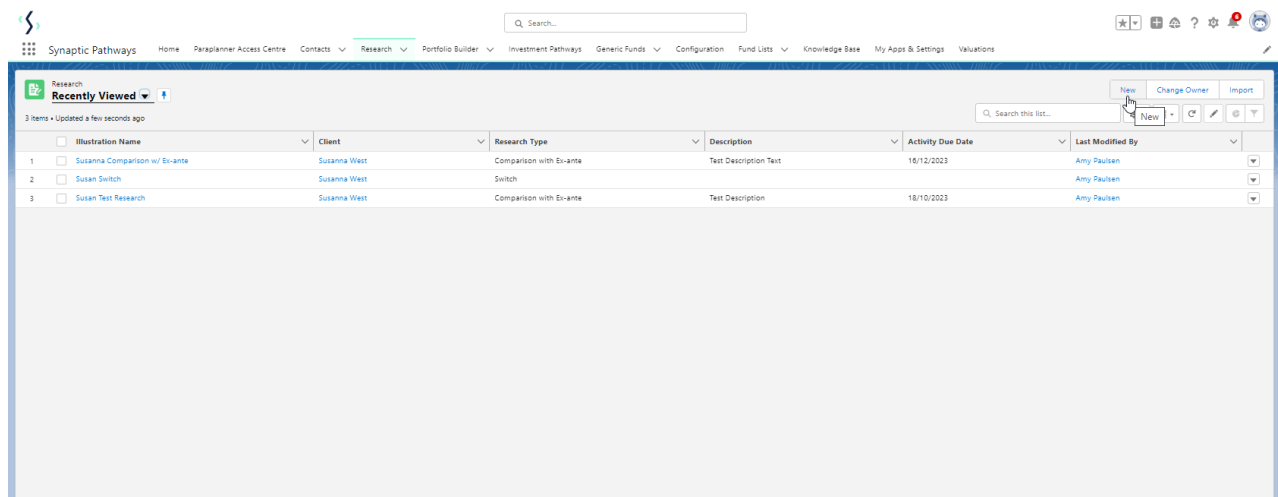
Last Modified on 16/10/2023 11:47 am BST

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

To create a comparison with Ex-ante scenario in the Research tab, click into the tab from the Homepage:



All existing research will be listed. Click **New** to create new research:



If you would like to run a comparison with an ex-ante report, select the first option. If you wish to create an ex-ante report without the comparison, select the second option:

Phone
Email

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 research within the Research tab, you will need to search for the client:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client

Search Contacts...

Recent Contacts

- Susanna West
- Test Client
- Test Client1
- 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: Comparison with Ex-ante

* = Required Information

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

Save:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client

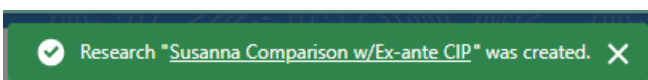
* Illustration Name

* Term

Description

Activity Due Date

This will take you directly into the research:



If using a Central Investment Proposition, Choose a segment:

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

Select an Option

Use Whole of Market Disabled

Segment 1

Save

If you would like to create Whole of Market research, select **Use Whole of Market**

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

Select an Option

Use Whole of Market Enable

Save

Synaptic Pathways

Synaptic Pathways
Home
Paraplanner Access Centre
Contacts
Research
Portfolio Builder
Investment Pathways
Generic Funds
Configuration
Fund Lists
Knowledge Base
My Apps & Settings
Valuations

Research

Susanna Comparison w/Ex-ante CIP

Client	Description	Illustration Type	Segment Name	Policy Type
Susanna West	Test Description	Segment	Segment 1	

Convert to Holding

Research
Review
Client Check-in
Report
Mark Status as Complete

Add Investment +

Add the investment details for a wrapper or choose from the available platforms or off platform products to create a comparison or illustration. Choose the segment, target risk category, funds and fees.

Synaptic

Ex-ante Results

Add or include investments to see comparison results.

Cancel
Continue to Ex-ante Illustration