

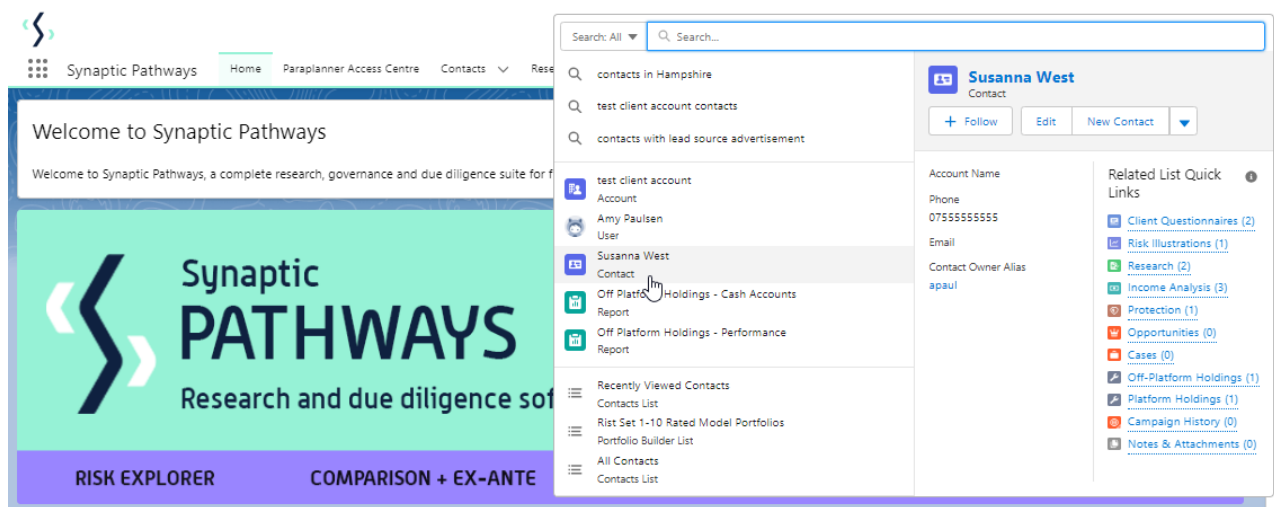
Comparison & Ex-Ante - Creating within a client record

Last Modified on 10/10/2023 12:25 pm BST

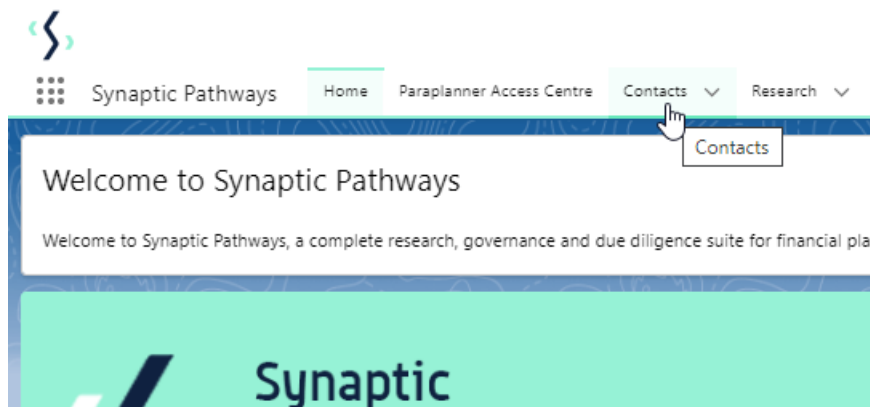
Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create a comparison with ex-ante scenario within a contact record, either:

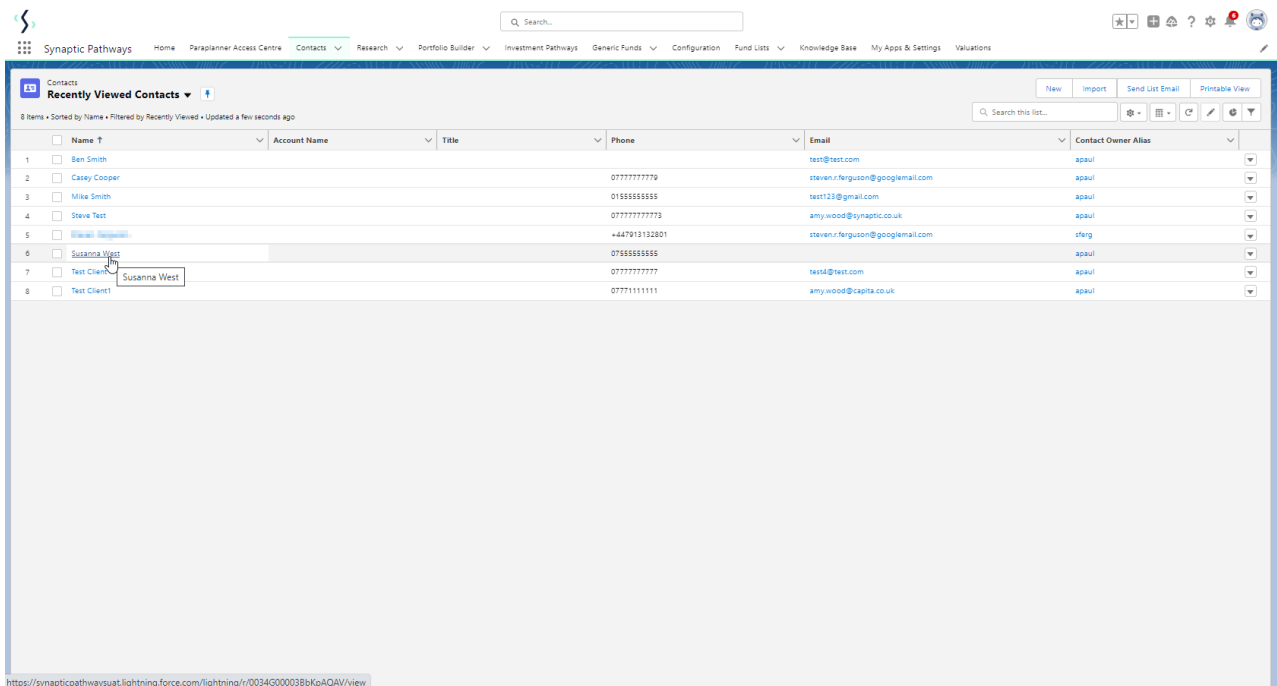
Search for the client in the top search bar:



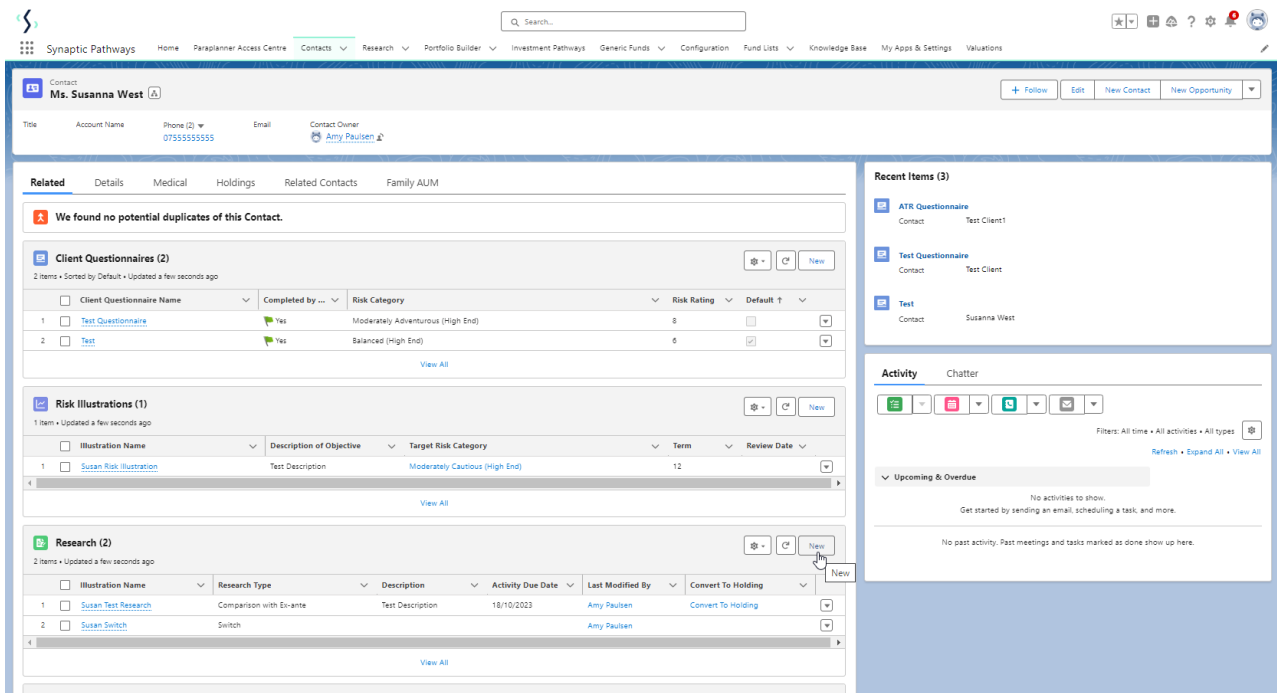
Alternatively, find the client within the **Contacts** tab:



Select the client from the contact list:



Click **New** within the Research area:



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:

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.

The client field will be populated automatically:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

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

Complete the remaining fields & **Save**:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

Search...

Synaptic Pathways Home Paraplanner Access Centre **Contacts** Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowl

Contact **Ms. Susanna West**

Research "Susanna Comparison w/ Ex-ante" was created. X

Title	Account Name	Phone (2)	Email	Contact Owner
		0755555555		Amy Paulsen

Related Details Medical Holdings Related Contacts Family AUM

This will add the research to the Research list. Click into the Illustration name to open:

Please note: You may have to view all if it is not listed on the details page.

Research (3) New

3 items • Updated 3 minutes ago

Illustration Name	Activity Due Date	Last Modified By	Convert To Holding
1 <input type="checkbox"/> Susan Test Research	18/10/2023	Amy Paulsen	Convert To Holding
2 <input type="checkbox"/> Susan Switch		Amy Paulsen	
3 <input type="checkbox"/> Susanna Comparison w/ Ex-ante	Text 16/12/2023	Amy Paulsen	

Susanna Comparison w/ Ex-ante

Client: Susanna West	Description: Test Description Text
Illustration Type: Whole of Market	Segment Name:
Policy Type:	

Search...

Synaptic Pathways Home **Contacts** Research Portfolio Builder Investment Pathways Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Contacts > Client Test **Research** New Change Owner

9 items • Updated a few seconds ago

Illustration Name	Research Type	Description	Activity Due Date	Last Modified By
1 <input type="checkbox"/> Test Illustration	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen
2 <input type="checkbox"/> Test Comp with exante	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen
3 <input type="checkbox"/> Test Pension Switch	Switch	Test Description	30/04/2022	Amy Paulsen
4 <input type="checkbox"/> Test Ex-Ante	Ex-ante	test	30/04/2022	Amy Paulsen
5 <input type="checkbox"/> Test Illustration.	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen
6 <input type="checkbox"/> Comparison with Ex-Ante.	Ex-ante	Test Description	30/04/2022	Amy Paulsen
7 <input type="checkbox"/> Test Ex-Ante	Comparison with Ex-ante	Test	30/04/2022	Amy Paulsen
8 <input type="checkbox"/> Test Switch 2904	Switch	Test Desc Text	30/04/2022	Amy Paulsen
9 <input type="checkbox"/> Test Illustration Apr22	Comparison with Ex-ante	Test Description Text	30/05/2022	Amy Paulsen

This will take you directly into the research
