

Comparison & Ex-Ante using a CIP - Creating through the homepage

Last Modified on 16/10/2023 11:35 am BST

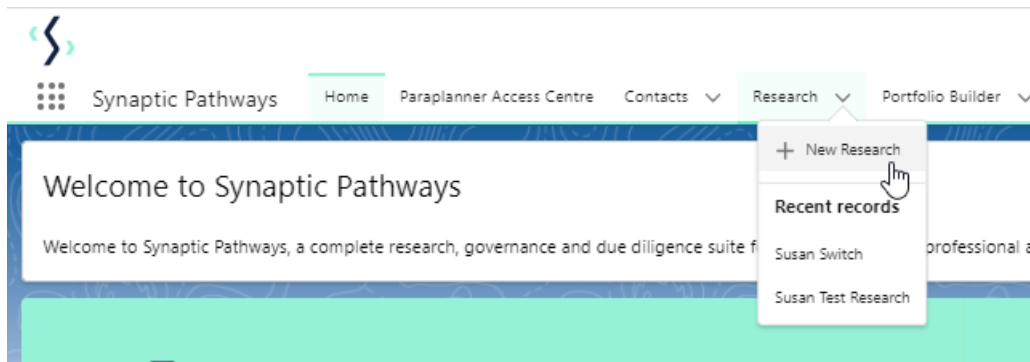
This article explains how to create Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup the CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles [here](#).

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

To create comparison with ex-ante research (using a Central Investment Proposition) directly from the Homepage, hover over the Research tab and select the down arrow:



Select **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:

The screenshot shows a 'New Research' form with the following content:

- 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.

At the bottom right, there are 'Cancel' and 'Next' buttons. A mouse cursor is pointing at the 'Next' button.

As we have created the research through the homepage, you will need to search for the client:

The screenshot shows the 'New Research: Comparison with Ex-ante' form. The 'Information' section contains a required field for the client:

- *Client**
 - Search Contacts... (with a search icon)
 - Recent Contacts
 - Susanna West (with a mouse cursor pointing to it)
 - Test Client
 - Test Client1
 - Steve Test
 - Ben Smith
 - + New Contact

At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

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

✓ Research "Susanna Comparison x/ Ex-ante" was created. ✕

As we have configured a Central Investment Proposition, we will need to choose whether to use a segment or conduct Whole of Market research:

Please note - If the whole of market button cannot be enabled, you do not have the permissions to overwrite the segment/s assigned to you in the CIP. Your Administrator can assign this for you. Article **Pathways Administrator - Assigning Whole of Market permissions** explains how this is applied to your account.

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

[Save](#)

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 ▼

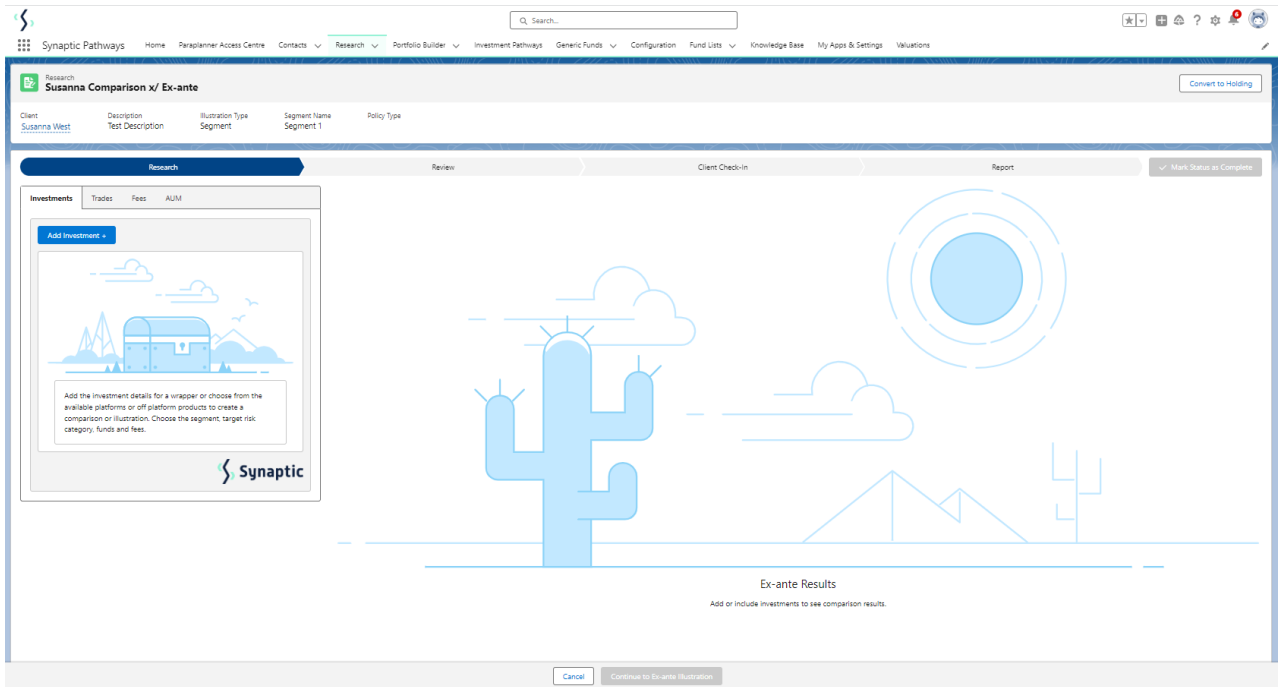
Segment 1

Use Whole of Market Disabled

[Save](#)

Once the segment is selected, **Save**

This will take you directly into the research:



The segment will be displayed at the top of the screen:

