Comparison & Ex-Ante using a CIP - Creating in the research tab

Last Modified on 16/10/2023 11:46 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:

Recently Viewed Instruction Name Client Instruction Name Client Research Type Description Name Client Research Type Description Activity Due Date Last Modified By Statemace Statemace Writet Statemace Writet Statemace Writet <th>Synaptic Pathways Home Paraplanner Acc</th> <th>tess Centre Contacts V Research V Portfoli</th> <th>Q Search Builder V Investment Pathways Generic Fund</th> <th>ds 🗸 Configuration Fund Lists 🗸 Knowledg</th> <th>ge Base My Apps & Settings Valuations</th> <th>*</th> <th>? 🌣 Ք 🧞</th>	Synaptic Pathways Home Paraplanner Acc	tess Centre Contacts V Research V Portfoli	Q Search Builder V Investment Pathways Generic Fund	ds 🗸 Configuration Fund Lists 🗸 Knowledg	ge Base My Apps & Settings Valuations	*	? 🌣 Ք 🧞
Susana Comparison w/ Ex-ante Susana West Comparison with Ex-ante Test Description Test 16/12/2023 Amy Paulsen Image: Comparison of the test Description Test Amy Paulsen Image: Comparison of the test Description Test Amy Paulsen Image: Comparison of the test Description Test Amy Paulsen Image: Comparison of test Description Test Description Test Description Test Amy Paulsen Image: Comparison of test Description Test Description Test Description Test Description Test Description Test Amy Paulsen Image: Comparison of test Description T					Q, Search	<hr/>	
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	3 Susan Test Research	Susanna West	Comparison with Ex-ante	Test Description	18/10/2023	Amy Paulsen	

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:

	Phot
	New Research
Select a record type	
۲	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
e O	Switch Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.
-volora Vathuran	Cancel

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 Client Steve Test	Q	
Ben Smith H New Contact	Cancel Save & New Save	

Note - Client field will already be completed if research is created directly in the contact record.

Complete the remaining fields:

New	Research: Comparison with Ex	-ante
		* = Required Information
Information		
*Client Susanna West	s x	
* Illustration Name Susanna Comparison w/ Ex-ante	ن	
*Term		
Description		
Activity Due Date	Ê	
	Cancel Save & New Save	

Save:

	* = Required Info
v Save	7
ev	ew Save Save

As we have configured a Central Investment Strategy, we will need to choose whether we 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 products and funds.	as the basis for this illustratic	on OR enable Whole of Market 'mode' to select from all available		
Thoose Segment Select an Option		Use Whole of Market		
Segment 1	Ę	Disabled		
		Save		

Once the segment is selected, **Save**

This will take you directly into the research:

Submitted Comparison W/Exame CPI Converted Hold State Converted Hold State Support State	Synaptic Pathways Home Paraplanner Access Centre Contacts V Research	Q. Search	✓ Configuration Fund Lists ✓ Knowledge Base	My Apps & Settings Valuations	** 🖬 🎕 ? 🌣 🤗 👼
Sector Weit Test Description Sepret Sepret	Olient Description Illustration Type Segment Name	oligi Type	STREET NIME HURT - DANSED	The second s	Convert to Holding
Add heatmark disalish for a wagper or choose from the matching product to rease at specific terms of particular to rease at the re	Susanna West Test Description Segment Segment 1		Client Check-In	Report	✓ Mark Status as Complete
Ex-ante Results Add or include investments to see comparison results.	Add hexatomer.		Add or include investments to a		

The segment can be found in the bar at the top of the screen:

Research Susanna	Comparison w/Ex-a	inte CIP		250111177 N
Client	Description	Illustration Type	Segment Name	Policy Type
Susanna West	Test Description	Segment	Segment 1	