

Comparison & Ex-Ante using a CIP - Creating research within a client record

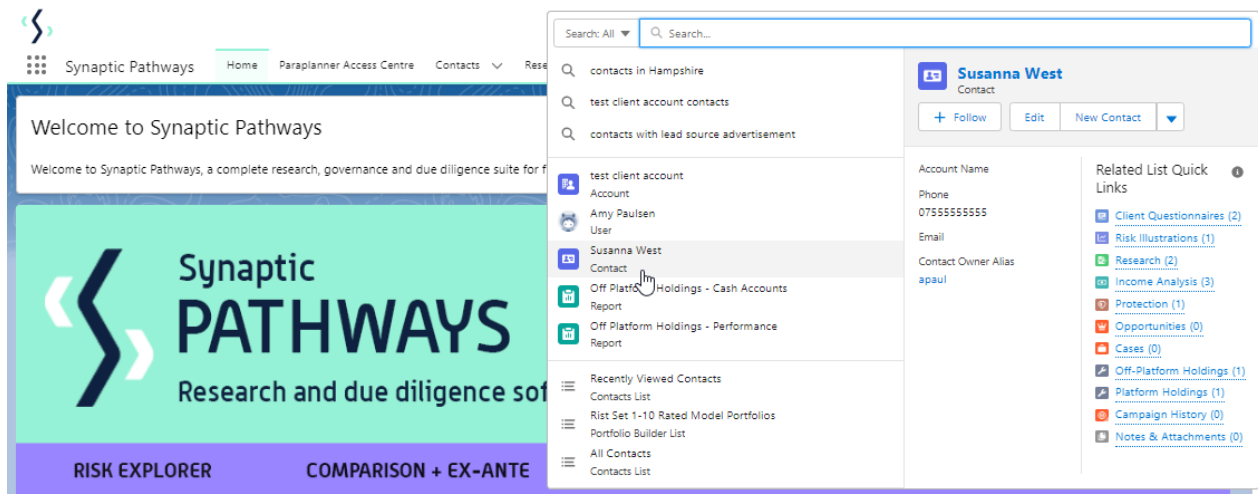
Last Modified on 16/10/2023 11:54 am BST

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 a comparison with Ex-ante scenario within a contact record, either:

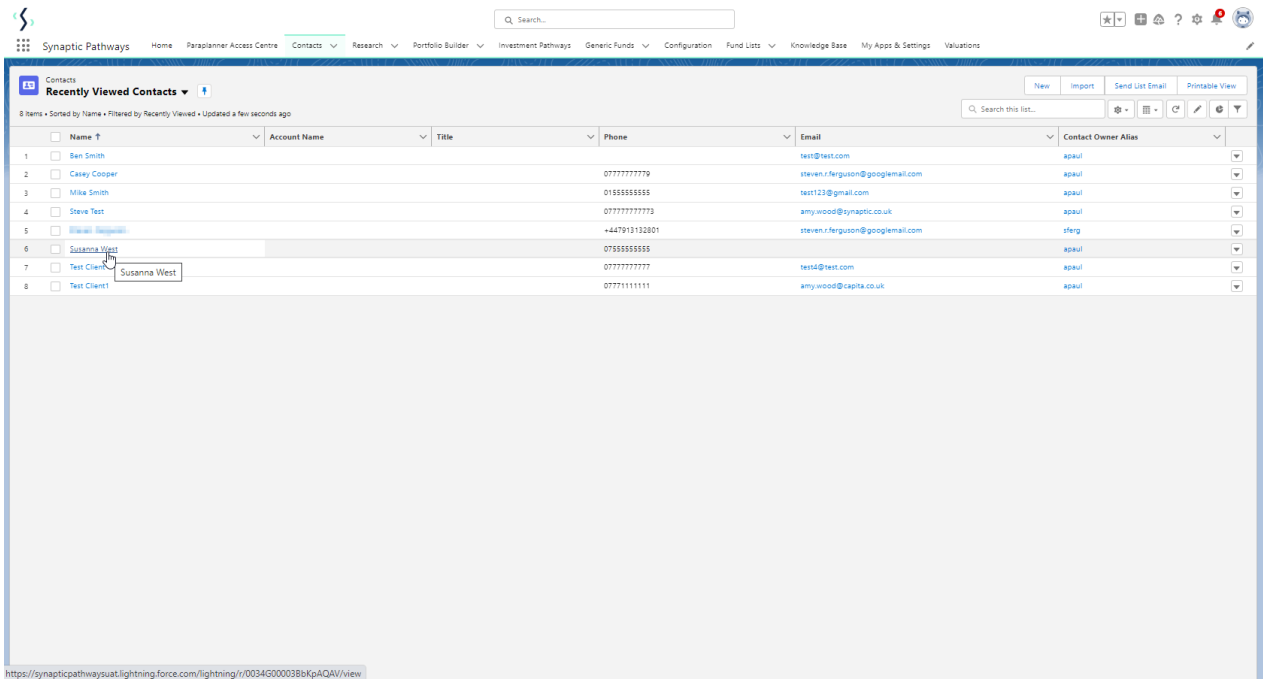
Search for the client in the top search bar:



Alternatively, find the client within the Contacts tab:

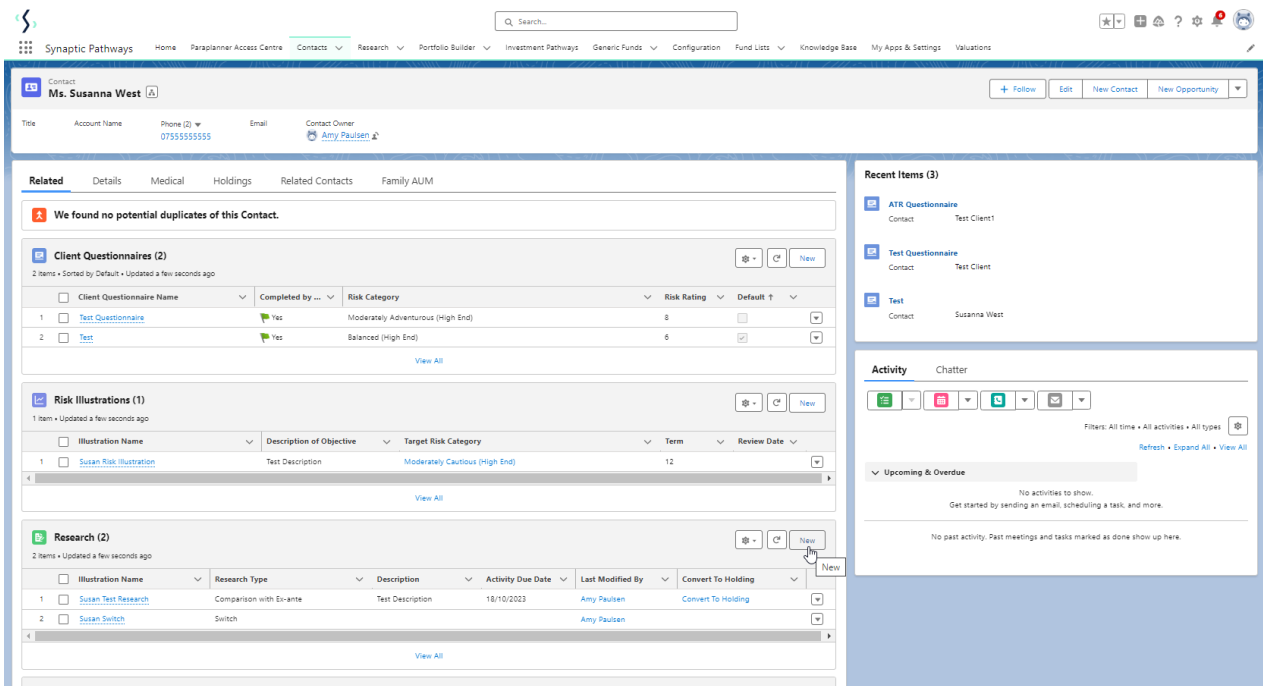


Select the client from the contact list:



https://synapticpathwaysuat.lightning.force.com/lightning/r/0034G00003B6kQAQ/view

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 automatically be completed

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. ✕

| 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) 3 items • Updated 3 minutes ago

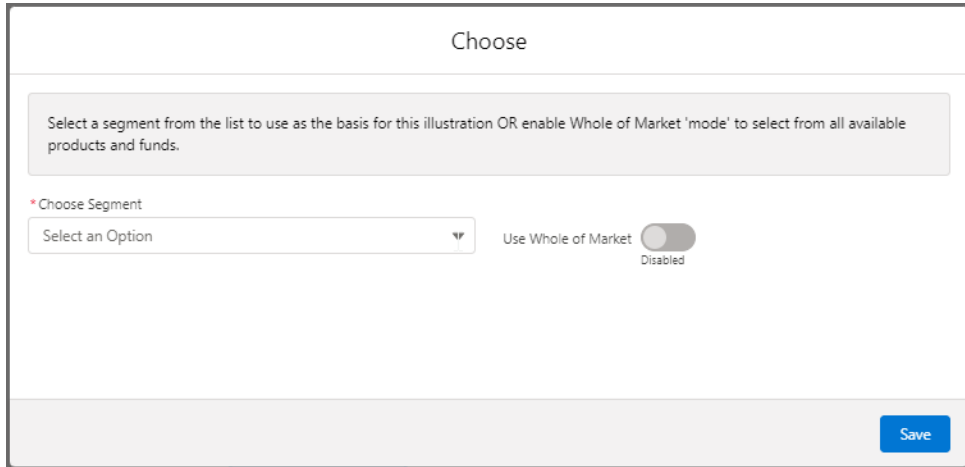
| Illustration Name | Activity Due Date | Last Modified By | Convert To Holding |
|---|-------------------|------------------|------------------------------------|
| 1 Susan Test Research | 18/10/2023 | Amy Paulsen | Convert To Holding |
| 2 Susan Switch | | Amy Paulsen | |
| 3 Susanna Comparison w/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

Research 9 items • Updated a few seconds ago

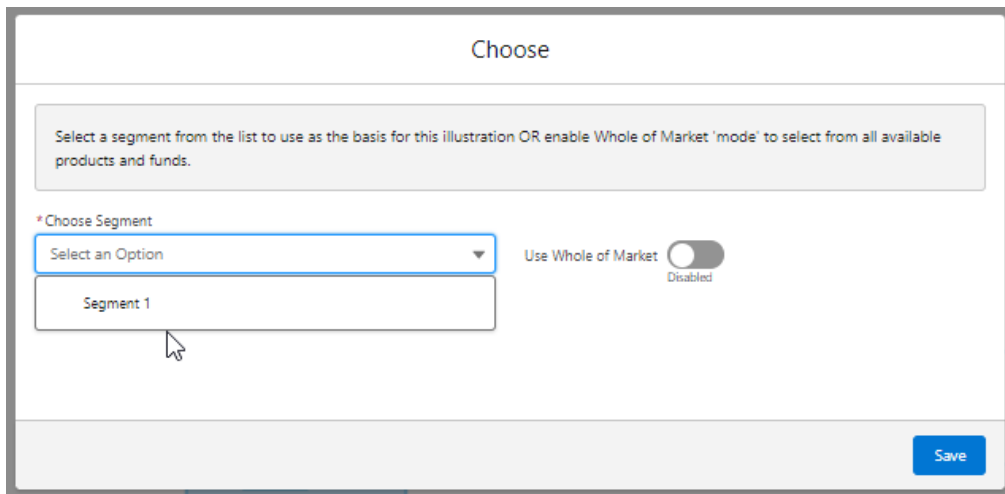
| Illustration Name | Research Type | Description | Activity Due Date | Last Modified By |
|---|-------------------------|-----------------------|-------------------|------------------|
| 1 Test Illustration | Comparison with Ex-ante | Test Description Text | 01/04/2022 | Amy Paulsen |
| 2 Test Comp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

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.



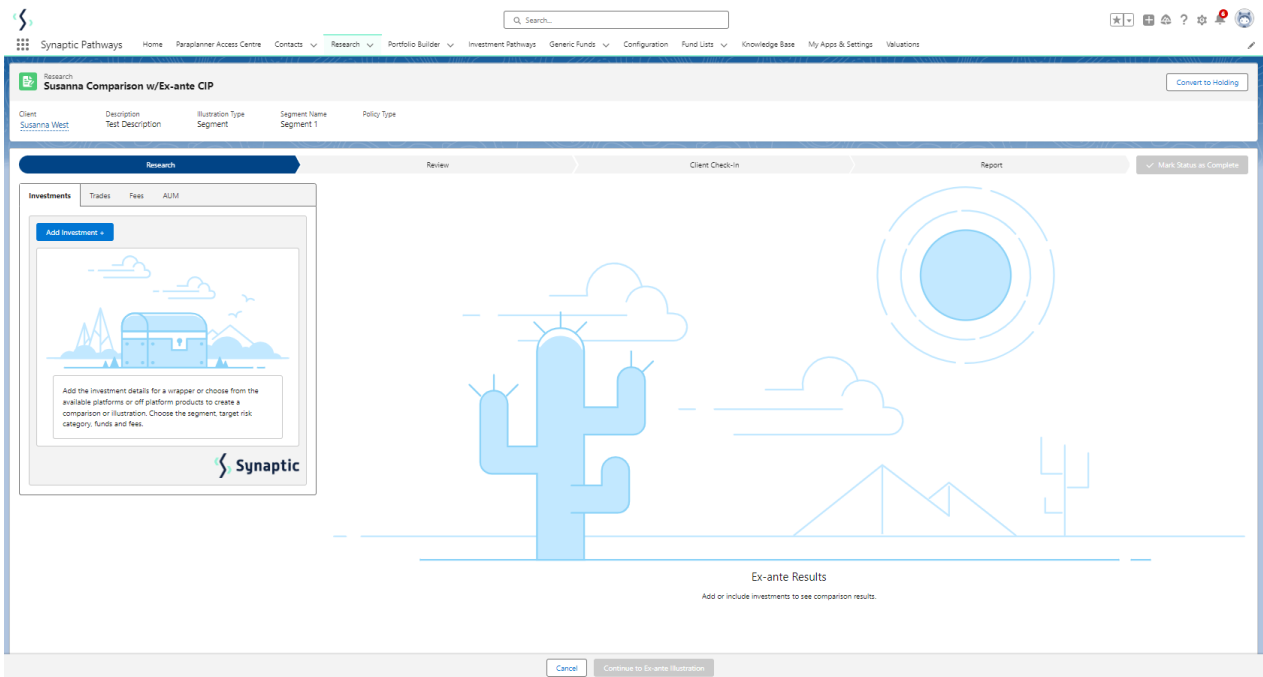
The screenshot shows a form titled "Choose". At the top, there is a grey box with the text: "Select a segment from the list to use as the basis for this illustration OR enable Whole of Market 'mode' to select from all available products and funds." Below this, there is a label "* Choose Segment" followed by a dropdown menu with the text "Select an Option" and a downward arrow. To the right of the dropdown is a toggle switch labeled "Use Whole of Market" which is currently in the "Disabled" position. At the bottom right of the form is a blue "Save" button.



This screenshot shows the same "Choose" form, but the dropdown menu is now open, displaying "Segment 1" as the selected option. A mouse cursor is pointing at the "Segment 1" option. The "Use Whole of Market" toggle remains disabled. The "Save" button is still visible at the bottom right.

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:

