

Ex-Ante - Creating through the homepage

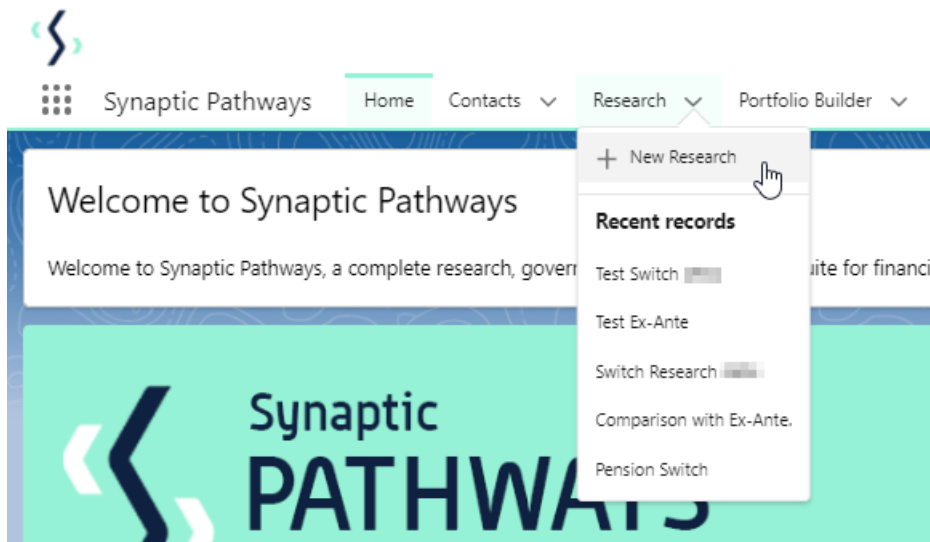
Last Modified on 05/05/2022 3:12 pm BST

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

To create an Ex-ante scenario 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.

In this example, we are creating an Ex-ante (Pre-Sales) scenario:

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.

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

New Research: Ex-ante (Pre-Sales)

Information

*Client

- Show All Results for "Cli"
- Client Test
- Test Client
- Test Client A
- [Redacted]
- New Contact

Activity Due Date

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

Complete the remaining fields:

New Research: Ex-ante (Pre-Sales)

Information

* Client ↶
ES Client Test ×

* Illustration Name

* Term ↶
Please fill out this field.

Description

Activity Due Date
 📅

Cancel Save & New Save

Save:

New Research: Ex-ante (Pre-Sales)

Information

* Client ↶
ES Client Test ×

* Illustration Name ↶
Test Illustration Ex-ante Apr22

* Term ↶
10

Description ↶
Test Description Text

Activity Due Date ↶
31/05/2022 📅

Cancel Save & New Save Save

This will take you directly into the research:

The screenshot shows the Synaptic Pathways application interface. At the top, there is a navigation bar with a search box and menu items: Synaptic Pathways, Home, Contacts, Research, Portfolio Builder, Investment Pathways, Configuration, Fund Lists, Knowledge Base, and My Apps & Settings. Below the navigation bar, a green notification banner states: "Research 'Test Illustration Ex-ante Apr22' was created." Below the notification, a table displays the details of the research test illustration:

Client	Description	Illustration Type	Segment Name
Client Test	Test Description Text	Whole of Market	

If using 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.

The screenshot shows a dialog box titled "Choose". The main instruction reads: "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 dropdown menu labeled "* Choose Segment" 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 turned off and labeled "Disabled". A blue "Save" button is located at the bottom right of the dialog box.

This screenshot shows the same "Choose" dialog box as above, but with the dropdown menu open. The dropdown menu lists two options: "Test Segment 1" and "Test Segment 2". A mouse cursor is hovering over "Test Segment 2". The "Use Whole of Market" toggle remains disabled. A blue "Save" button is at the bottom right.

Once the segment is selected, **Save**.