Ex-Ante - Creating in the Research tab

Last Modified on 05/05/2022 3:15 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 in the Research tab, click into the tab from the Homepage:



All existing research will be listed. Click **New** to create new research:

Updated a few seconds ago Illustration Name	✓ Client	✓ Research Type	✓ Description	Activity Due Date	✓ Last Modified By	
Test Illustration Apr22	V Client Test Client	Research Type Comparison with Ex-ante	Description Test Description Text	Activity Due Date 31/05/2022	Last Modified By Amy Paulsen	\sim
Test Switch 2904	Client Test	Comparison with Ex-ante Switch	Test Description Text	30/04/2022	Amy Paulsen	
Test Ex-Ante	Client Test	Comparison with Ex-ante	Test	50/04/2022	Amy Paulsen	
Switch Research 2604	Test Client	Switch	Desc	30/04/2022	Amy Paulsen	
Comparison with Ex-Ante.	Client Test	Ex-ante	Test Description	30/04/2022	Amy Paulsen	
Pension Switch	Jane Doe	Switch	Pension Switch Description	30/04/2022	Amy Paulsen	
Test Illustration.	Client Test	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen	
Test Illustration	Client Test	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen	
Test Ex-Ante	Client Test	Ex-ante	test	30/04/2022	Amy Paulsen	
Pension Switch	Jane Doe	Switch	Test Description	30/04/2022	Amy Paulsen	
Comparison with Ex-ante	Jane Doe	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen	
Test Pension Switch	Client Test	Switch	Test Description	30/04/2022	Amy Paulsen	
Test Comp with exante	Client Test	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen	
Dec Test	Test Client	Comparison with Ex-ante	0	23/12/2021	Amy Paulsen	
Test Comp Exante Dec	Test Client	Comparison with Ex-ante	Comp Description	01/01/2022	Amy Paulsen	
Exante Dec	Test Client	Ex-ante	Descr	29/12/2021	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:

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

A contraint.	Reason Suitzk Recention 20204
	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
۲	Ex-ante (Pre-Sales) Select this option to create an Ex-ante (pre-sales) illustration for a single product
0	Switch Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.
	Cancel Next

As we have created research within the Research tab, you will need to search for the client:

New Research: Ex-ante (Pre-Sales)
Information
*Client C. Q Show All Results for "Cli" C Glient Test C Glient Test C Glient A C Test Client A C C Activity Due Date
Cancel Save & New Save

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	to X	
* Illustration Name		
*Tel Please fill out this field.		
Description		
Activity Due Date		
	Cancel Save & New Save	

Save:

	New Research: Ex-ante (Pre-Sales)
Information	
* Client	5
🖾 Client Test	×
* Illustration Name	5
Test Illustration Ex-ante Apr22	
*Term	5
10	
Description	5
Test Description Text	
Activity Due Date	5
31/05/2022	tin a state of the
	Cancel Save & New Save Save

This will take you directly into the research:

	All 🔻 Q Search Research and more
Synaptic Pathways Home Contacts 🗸 Research	Portfolio Builder 🗸 Investment Pathways Configuration Fund Lists 🗸 Knowledge Base
Research Test Illustration Text	Research <u>"Test Illustration Text"</u> was created.
Client Description Illustration Type Test Client Test Description Text Whole of Market	Segment Name
Research	Basis of Illustration Client Check-In
Synaptic Pathways Home Contacts V Research V	Q Search Portfolio Builder V Investment Pathways Configuration Fund Lists V Knowledge Base My Apps & Settings
Research Test Illustration Ex-ante Apr22	Research <u>"Test Illustration Ex-ante Apr22"</u> was created.
Client Description Illustration Type <u>Client Test</u> Test Description Text Whole of Market	Segment Name

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.

	Cho	oose	
Select a segment from the list to use as the basis for this il products and funds.	ustratio	on OR enable Whole of I	Market 'mode' to select from all available
*Choose Segment			
Select an Option	Y	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 a products and funds.				Market 'mode' to select from all available
Choose Segment Select an Option		•	Use Whole of Market	
Test Segment 1			Use whole of Market	Disabled
Test Segment 2	Ę			
				Save

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