

Ex-Ante - Creating in the Research tab

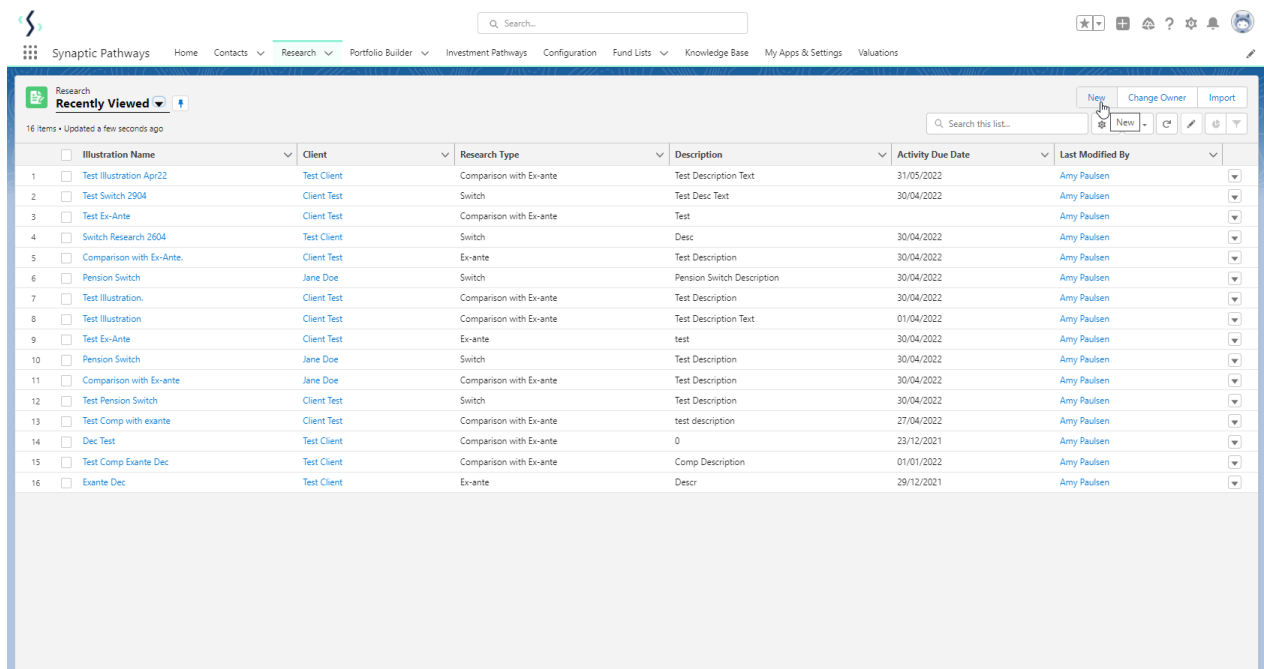
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Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

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:



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 research within the Research tab, 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
-

+ 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 ↶
 ✕

* Illustration Name

* Term ↶

Description

Activity Due Date
 📅

Save:

New Research: Ex-ante (Pre-Sales)

Information

* Client ↶
 ✕

* Illustration Name ↶

* Term ↶

Description ↶

Activity Due Date ↶
 📅

Save

This will take you directly into the research:

The first screenshot shows the Synaptic Pathways interface with the 'Research' tab selected. A green notification bar at the top right states: "Research 'Test Illustration Text' was created." Below this, a table displays the following details:

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

The second screenshot shows the same interface with the 'Research' tab selected. A green notification bar at the top right states: "Research 'Test Illustration Ex-ante Apr22' was created." Below this, a table displays the following details:

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.

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 ▼

Use Whole of Market Disabled

Test Segment 1

Test Segment 2

Save

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