Ex-Ante - Creating research within a client record

Last Modified on 05/05/2022 3:19 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 within a contact record, either:

Search for the client in the top search bar:

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Synaptic Pathways Home Contacts 🗸 Resea	Amy Test contacts	Client Test Contact		ions	
Welcome to Synaptic Pathways Welcome to Synaptic Pathways, a complete research, governance and Synaptic PATHWAY Research and due diliger RISK EXPLORER	Ind due d Ciert Test Test Ciert Test Ciert Test Wardshow Apr22 Test Wardshow Apr22 Test Wardshow Apr24 Test Wardshow Apr24 Test Scharte Research - Test Decription Test Test Scharte Research - Test Show more results for "Test"	Account Name Phone Email Contect Owner Allas apaid	New Contact Related List Quick Athude To Risk Quee,(0) Risk Illustrations (0) Research (8) Composition Cases (0) Cases (0) Cases (0) Cases (0) Cases (0) Notes & Attachments (0)	nt Contacts (3) Ms. Client Test Tite Account Name Phone Email Mobile Contact Owner Amy Paulsen Ms. Jane Doe Tite Account Name Phone 0777777777 Email janettest@test.com Mobile	
Your Clients	View Investment Pathways	View and Build Portfolios		Contact Owner Amy Paulsen	
Manage your Clients, complete Attitude to Risk	Create portfolios to be used in Client illustrations, view portfolios by regulatory status, create and manage a CIP. Explore: Pathways	Setup and review portfolios, align portfolio allocation, review risk profile of portfolios.	is to asset	Ms. Test Client Tile Account Name Phone 077777777 Email test1@test.com Mobile Mobile Contact Owner Amy Paulsen Amy Paulsen Amy Paulsen	
			Rece	ant Items (3) Test Illustration Apr22 Cilent Test Oscioption Test Illustration Type Whole of Market	
			 ₽-	Segment Name Test Switch 2904	

Alternatively, find the client within the **Contacts** tab:



Select the client from the contact list:

Synaptic Pathways	Home Contacts V Research V Portfo	olio Builder 🗸 Investment Pathways	Configuration Fund Lists ∨ Knowledge E	Base My Apps & Settings Valuations	New Import Send List Email	Printable View
	ently Viewed • Updated a few seconds ago			Q. Sea	rch this list 🕸 + 🔳 + C ^e	
Name 1	✓ Account Name	√ Title	✓ Phone	∨ Email	✓ Contact Owner Alias	~
Chris Smith			0777777771	test@test.com	apaul	
Client Test					apaul	
Jane Doe Client Test			0777777777	janetest@test.com	apaul	
Steve Test Test Client			0777777777	test1@test.com	apaul	

Click **New** within the Research area:

Synaptic Pathways Home Contacts	s 🧹 Research 🗸 Portfolio Builder 🕚	Q Search	Configuration Fund Lists 🗸	Knowledge Base	My Apps & Settings	🗶 🗉 💩 ? 🕸	
Contact Ms. Client Test A Tite Account Name Phone (2) V	Email Contact Owner	1947 - 1948-	1111 - <i>1111</i> 25 (11347, 300)	JULIA JULIA J		+ Follow Edit New Contact New Opport	unity 💌
Related Details Holdings	this Contact.) \ &_ */////~\\		' J \ & ₆ ≥J/ <i>J > </i>		Recent Items (2) Recent Items (2) Risk Questionnaire. Contact Jane Doe	/ (Va (977
Attitude To Risk Questionnaires (0)				New Cha	nge Owner	Risk Questionnaire Contact Jane Doe	
 Risk Illustrations (0) Research (5+) 			\$ ·		nge Owner	Activity Chatter New Task New Event Log a Call Email	
5+ items • Updated a few seconds ago Illustration Name V	Research Type V	Description	✓ Activity Due Date ✓	Last Modified By	~	Create a task	Add
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	¥	Filters: All time • All activities • All	types 🕸
3 Test Pension Switch	Switch	Test Description	30/04/2022	Amy Paulsen	T	Refresh • Expand	All • View All
4 Test Ex-Ante	Ex-ante	test	30/04/2022	Amy Paulsen	•	✓ Upcoming & Overdue	
5 Test Illustration.	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen	¥	No next steps.	
4) b	To get things moving, add a task or set up a meeting.	
Opportunities (0)	Vie	w All			New	No past activity. Past meetings and tasks marked as done show up here	
Cases (0)				New Cha	nae Owner		

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:

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New Research				
Select a record type	Comparison with Ex-ante			
0	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			

The client field will be populated automatically:

nail Contact Owner		×
New Rese	earch: Ex-ante (Pre-Sales)	ļ
Information		D
* Client Test Client * Illustration Name * Term	 ✓ ✓	
Description Activity Due Date		
Cancel	Save & New Save	iv

Note - **Client** field will not be completed if research has been created through the Research tab or homepage.

Complete the remaining fields & **Save:**

formation				
* Client				
🖪 Client Test	×			
* Illustration Name	4			
Test Illustration Apr 22 Ex-ante				
* Term	5			
10				
Description	5			
Test Description Text				
Activity Due Date	5			
31/05/2022				
Synaptic Pathways Home Conta	Cancel Save & New	Save Q. Search Investment Pathways Config	guration Fund Lists 🗸	Knowledge Base My Apps
Synaptic Pathways Home Contact Contact Ms. Client Test A		Q Search Investment Pathways Config	guration Fund Lists V	
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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 (5+)							
		Illustration Name 🗸	Research Type	\sim	Description ~	Activity Due Date 🗸	Last Modified By \sim	
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	•
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Q. Search...
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Synaptic Pathways Home Contacts > Research > Portfolio Builder > Investment Pathways Configuration Fund Lists > Knowledge Base My Apps & Settings Valuations

Synaptic Pathways Home Contacts Contacts	 Portfolio Builder Investment Pathways Configura 	tion Fund Lists 🗢 Knowledge base. My Apps & S	ettings valuations		AN ANNAL COUNTER		
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Illustration Name	Research Type	Description V	Activity Due Date 🗸	Last Modified By	~		
1 Test Illustration	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen	V		
2 Test Comp with exante	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen	¥		
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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	V		
7 Test Ex-Ante	Comparison with Ex-ante	Test		Amy Paulsen	V		
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9 Test Illustration Apr22	Comparison with Ex-ante	Test Description Text	30/05/2022	Amy Paulsen	V		
Test Illustration Apr22							

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This will take you directly into the research