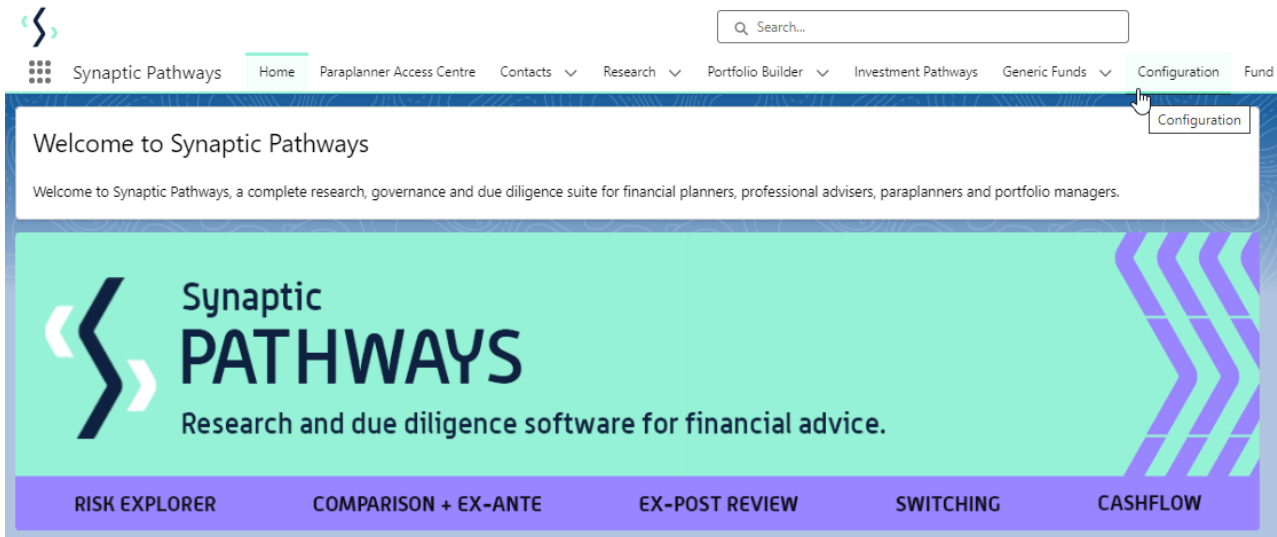


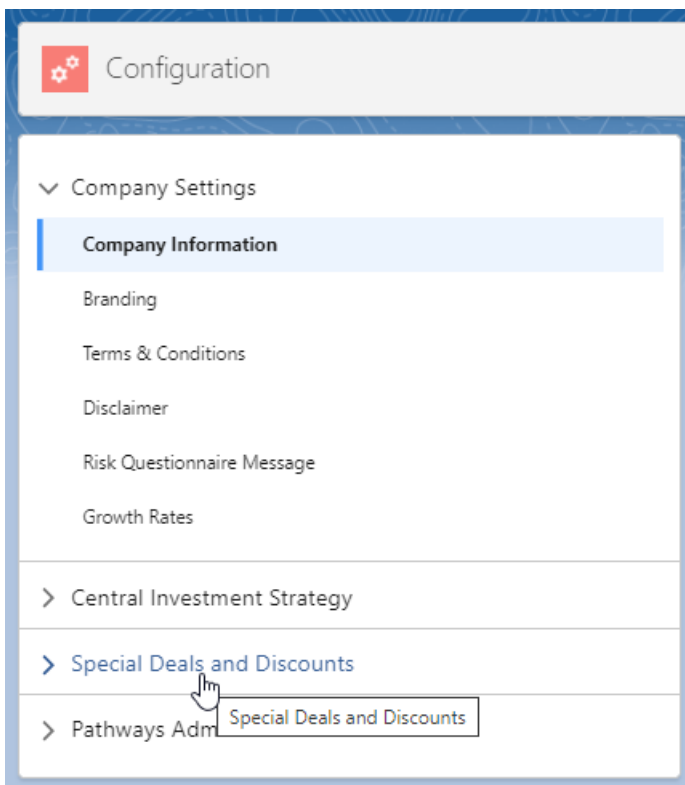
Creating Special Deals

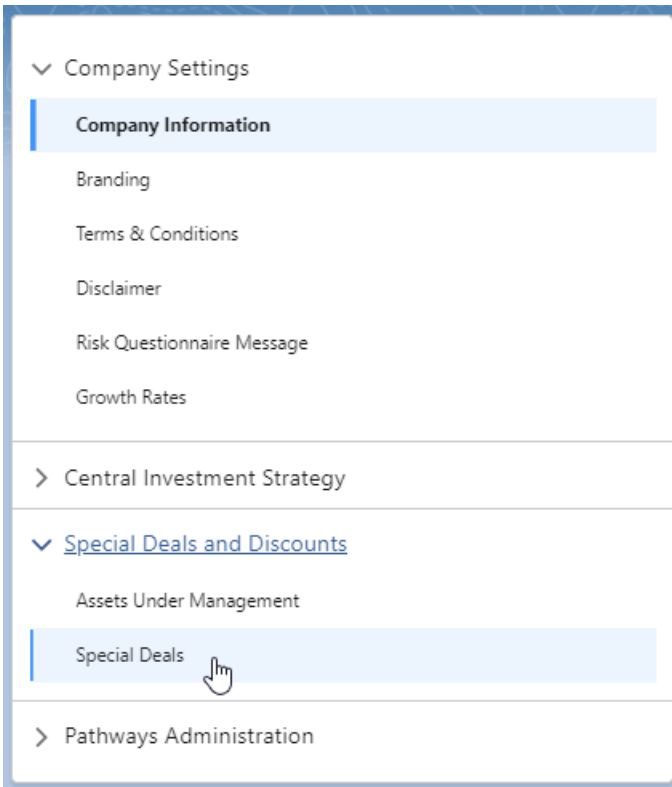
Last Modified on 24/11/2023 11:46 am GMT

To create a special deal in Synaptic Pathways, navigate to **Configuration** in the navigation bar:

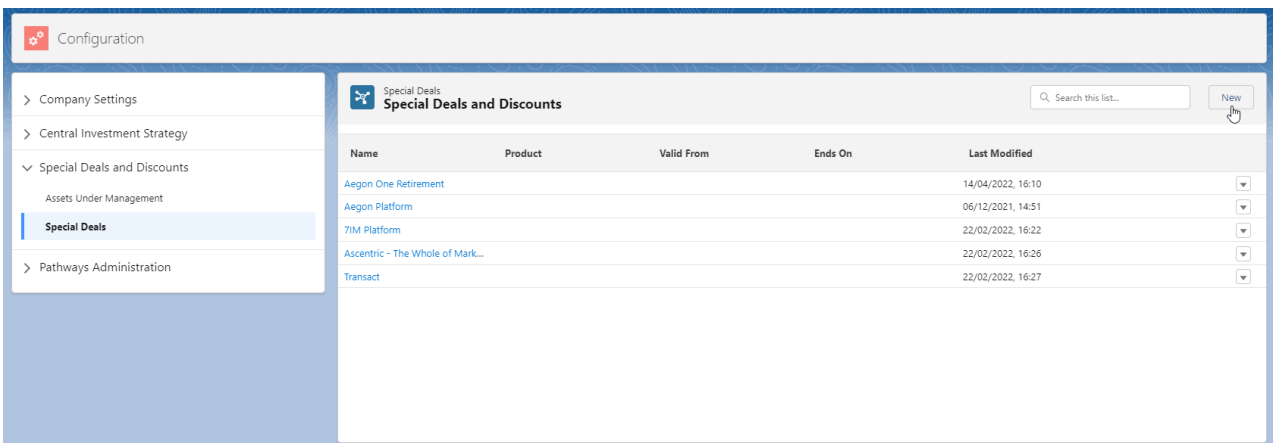


Click into **Special Deals and Discounts**, then **Special Deals**:





To create a special deal, click **New**:



Select whether you would like to create a platform or off platform special deal.

In this example, we will click **Platforms**:

✕

Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

*Name

Description

Cancel Save & New Save

Select the Platform from the drop down:

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

- 7IM Platform
- abrdrn Wrap
- Advance by Embark Platform
- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre

Once selected, you are able to remove the platform if selected in error. If you are happy to proceed, you can either keep the default name of the deal or change it:

✕

Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

Aegon Platform ✕

*Name

Description

Cancel Save & New Save

Once complete, **Save:**

Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

Aegon Platform

* Name

Aegon Platform TEST

Description

Test Description Text Here

Cancel Save & New Save

The deal has been successfully created:

Configuration

Success! Special Deal [Aegon Platform TEST] was created successfully!

Special Deals and Discounts

Name	Product	Valid From	Ends On	Last Modified
7IM Platform				19/10/2021, 17:53
Aegon Platform TEST				04/11/2021, 15:24

To add the details of the deal, click into the record:

Special Deals and Discounts

Name	Product	Valid From	Ends On	Last Modified
7IM Platform				19/10/2021, 17:53
Aegon Platform TEST				04/11/2021, 15:24

The deal will be **Active** by default. You can set **Not Active** if you would rather edit & activate it at a later date. Enter the **Deal Start Date** (leave blank if starting from today) & **Deal End Date** (leave blank if there is no expiry date):

Name: Aegon Platform
Provider: Aegon Platform
Portfolio: -
Deal Start Date (leave blank to apply from today):
Last Modified Date: Thu, 09 Nov 23
Platform: All Platform Products
Special Deal Type: -
Deal End Date (leave blank for no expiry date):
Last Modified By: -

Special Deal Charge Type | **Special Deal Charge Details** | **About Special Deal**

Platform Charges

Platform Charges

Charge Tier Name: Platform AMC

View Provider Charges | View Network Charges

Revert to Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£100,000.00	0.29		All
£100,000.00	£250,000.00	0.26		All
£250,000.00	£500,000.00	0.23		All
£500,000.00	£1,000,000.00	0.15		All
£1,000,000.00		0.00		All

Self Invested Personal Pension

AJ Bell Investcentre SIPP

Charge Tier Name: SIPP AMC

Edit | Add Row

About Special Deal

Edit the provider published charge tiers to apply the special deal you have agreed with the provider.

Change the existing tiers or add and remove new tiers.

Use the 'Revert' Action to return to the default published charge details.

From time to time published charges may be revised or removed by the provider; in the event of a change a warning notification will appear to indicate the special deal needs attention.

Special Deals are applied when an illustration is requested, only 'Active' Deals are applied.

Charges will be broken down by Platform AMC and charges per product.

To add details of a special deal, click **Edit**

Special Deal Charge Type | **Special Deal Charge Details**

Platform Charges

Platform Charges

Charge Tier Name: Platform AMC

View Provider Charges | View Network Charges

Revert to Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£100,000.00	0.29	All
2	£100,000.00	£250,000.00	0.26	All
3	£250,000.00	£500,000.00	0.23	All
4	£500,000.00	£1,000,000.00	0.15	All
5	£1,000,000.00		0.00	All

Edit | Add Row

Amend the tiers by clicking on the pen icon next to the value you would like to update:

Platform Charges

Platform Charges

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[Revert to Provider Charges](#)

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£100,0...	0.29		All		
2	£100,0...	£250,0...	0.26		All		
3	£250,0...	£500,0...	0.23		All		
4	£500,0...	£1,000,...	0.15		All		
5	£1,000,...		0.00		All		

As you amend the tiers, you will need to make sure the remaining tiers start and end at the correct value:

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£120,0...	0.29		All		
2	£100,0...	£250,0...	0.26		All		
3	£250,0...	£500,0...	0.23		All		
4	£500,0...	£1,000,...	0.15		All		
5	£1,000,...		0.00		All		

[Cancel](#) [Save](#)

As seen below:

	Tier St...	Tier End	Rate %
1	£0.00	£120,0...	0.29
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

Edit charge values by clicking the pen and update:












	Tier St... ▾	Tier End ▾	Rate % ▾
1	£0.00	£120,0...	0.29 
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

	Tier St... ▾	Tier End ▾	Rate % ▾
	<input type="text" value="0.29"/>		
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

	Tier St... ▾	Tier End ▾	Rate % ▾
1	£0.00	£120,0...	0.28
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

Note: Updated fields will be highlighted in yellow

Additional rows can be added through the **Add Row** button:

							Edit	Add Row 
	Tier St... ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Curren... ▾	Select Fun...	Remove	
1	£0.00	£120,0...	0.28		All			
2	£120,0...	£250,0...	0.26		All			
3	£250,0...	£500,0...	0.23		All			
4	£500,0...	£1,000,...	0.15		All			
5	£1,000,...		0.00		All			

Complete the details by clicking into each field:

	Tier St... ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Curren... ▾	Select Fun...	Remove
1	£0.00	£120,0...	0.28		All		
2					All		
3	£120,0...	£250,0...	0.26		All		
4	£250,0...	£500,0...	0.23		All		
5	£500,0...	£1,000,...	0.15		All		
6	£1,000,...		0.00		All		

	Tier St... ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Curren... ▾	Select Fun...	Remove
1	£0.00	£100,0...	0.29		All		
2					All		
3	£100,0...	£250,0...	0.26		All		
4	£250,0...	£500,0...	0.23		All		
5	£500,0...	£1,000,...	0.15		All		
6	£1,000,...		0.00		All		

Once updated, the Special Deal Charge Details will be highlighted in green:

Platform Charges

▼ Platform Charges

Charge Tier Name
Platform AMC

[View Provider Charges](#)

[View Network Charges](#)

[↶ Revert to Provider Charges](#)

	Tier Start ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Fund Type ▾
1	£0.00	£120,000.00	0.28		All
2	£120,000.00	£250,000.00	0.26		All
3	£250,000.00	£500,000.00	0.23		All
4	£500,000.00	£1,000,000.00	0.15		All
5	£1,000,000.00				All

If you would like to view the original provider charges, click **View Provider Charges**

Charge Tier Name

Platform AMC

View Provider Charges

View Network Charges

Revert to Provider Charges

Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£100,000.00	0.29		All
£100,000.00	£250,000.00	0.26		All
£250,000.00	£500,000.00	0.23		All
£500,000.00	£1,000,000.00	0.15		All
£1,000,000.00		0.00		All

If you would like to revert the charges, click **Revert to Provider Charges**

Platform Charges

Platform Charges

Charge Tier Name
Platform AMC

View Provider Charges

View Network Charges

Revert to Provider Charges

Edit Add Row

	Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£120,000.00	0.28		All
2	£120,000.00	£250,000.00	0.26		All
3	£250,000.00	£500,000.00	0.23		All
4	£500,000.00	£1,000,000.00	0.15		All
5	£1,000,000.00				All

Revert to Provider Charges

This will delete current Special Deal for this Charge Tier.

Would you like to continue?

No Yes

Platform Charges

Platform Charges

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[Revert to Provider Charges](#)

	Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£100,000.00	0.29		All
2	£100,000.00	£250,000.00	0.26		All
3	£250,000.00	£500,000.00	0.23		All
4	£500,000.00	£1,000,000.00	0.15		All
5	£1,000,000.00		0.00		All

When you have made the changes needed, are saved automatically. Click the cross next to the deal name in the navigation bar:

The screenshot shows the Synaptic Pathways interface. The top navigation bar includes a search box and various menu items. The main content area is titled 'Platform Charges' and displays details for 'Aegon Platform'. The 'Platform Charges' section is expanded, showing a table of charge tiers. The table has columns for Tier Start, Tier End, Rate %, Rate £, and Fund Type. The data is as follows:

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£100,000.00	0.29		All
£100,000.00	£250,000.00	0.26		All
£250,000.00	£500,000.00	0.23		All
£500,000.00	£1,000,000.00	0.15		All
£1,000,000.00		0.00		All

The interface also includes buttons for 'Active' and 'Not Active', and a 'Special Deal Charge Type' section. A 'Self Invested Personal Pension' section is also visible below.

If you would like to view the special deal again, navigate back into **Configuration > Special Deals and Discounts > Special Deals**