

# Comparison & Ex-Ante - Creating through the homepage

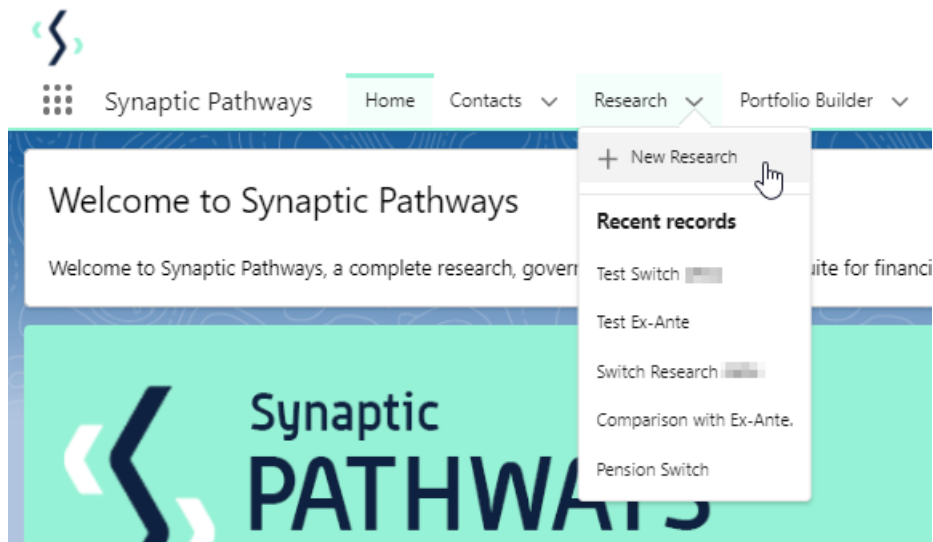
Last Modified on 26/05/2022 10:16 am BST

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

To create a comparison with 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:

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.

Cancel Next

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

New Research: Comparison with Ex-ante

Information

\* Client

Search Contacts...

Recent Contacts

- Jane Doe
- Test Client
- Client Test
- Steve Test
- Chris Smith
- + New Contact

Cancel Save & New Save

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

Complete the remaining fields:

al advisers, para planners, compliance and administration staff, part of the Synaptic Pathways research and

Ms. Test

### New Research: Comparison with Ex-ante

Information

\* Client  
Test Client 1

\* Illustration Name  
Please fill out this field.

\* Term

Description

Activity Due Date

Cancel Save & New Save

#### Save:

### New Research: Comparison with Ex-ante

Information

\* Client  
Test Client

\* Illustration Name  
Test Illustration Apr22

\* Term  
10

Description  
Test Description Text

Activity Due Date  
31/05/2022

Cancel Save & New Save

This will take you directly into the research:



Search...



Synaptic Pathways

Home

Contacts

Research

Portfolio Builder

Investment Pathways

Configuration

Fund Lists

Knowledge Base

My Apps & Settings



Research

### Test Illustration Apr22



Research "Test Illustration Apr22" was created.



Client	Description	Illustration Type	Segment Name
<a href="#">Test Client</a>	Test Description Text	Whole of Market	

Research

Review

Client Check-In