

# Comparison & Ex-Ante - Creating in the research tab

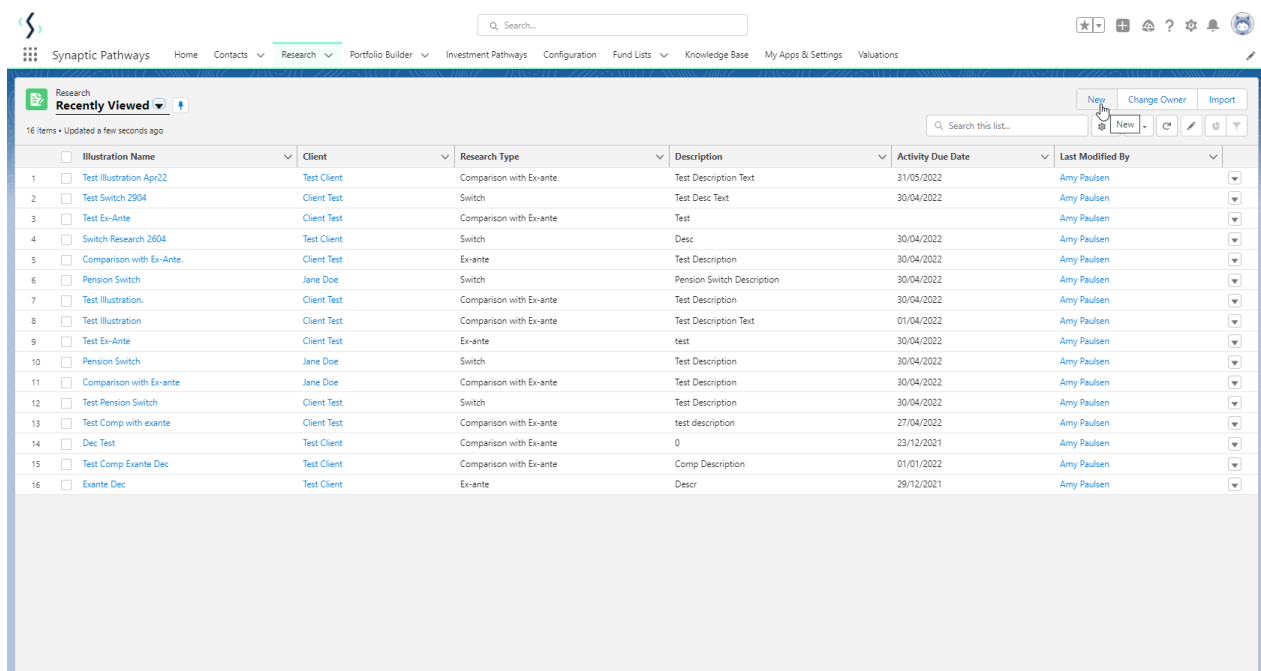
Last Modified on 26/05/2022 10:17 am BST

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 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:

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 research within the Research tab, 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, paraplanners, 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:



Q Search...



Research

### Test Illustration Apr22



Research "Test Illustration Apr22" was created.



Client

[Test Client](#)

Description

Test Description Text

Illustration Type

Whole of Market

Segment Name

Research

Review

Client Check-In