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:

E	Research Recently Viewed								Q. Search this list		New Change Ow	
	Illustration Name	~	Client	~	Research Type	~	Description	\sim	Activity Due Date	∨ La	st Modified By	\sim
	Test Illustration Apr22		Test Client		Comparison with Ex-ante		Test Description Text		31/05/2022	Ar	ny Paulsen	
	Test Switch 2904		Client Test		Switch		Test Desc Text		30/04/2022	Ar	ny Paulsen	
	Test Ex-Ante		Client Test		Comparison with Ex-ante		Test			Ar	ny Paulsen	
	Switch Research 2604		Test Client		Switch		Desc		30/04/2022	Ar	ny Paulsen	
	Comparison with Ex-Ante.		Client Test		Ex-ante		Test Description		30/04/2022	Ar	ny Paulsen	
	Pension Switch		Jane Doe		Switch		Pension Switch Description		30/04/2022	Ar	ny Paulsen	
	Test Illustration.		Client Test		Comparison with Ex-ante		Test Description		30/04/2022	Ar	ny Paulsen	
	Test Illustration		Client Test		Comparison with Ex-ante		Test Description Text		01/04/2022	Ar	ny Paulsen	
	Test Ex-Ante		Client Test		Ex-ante		test		30/04/2022	Ar	ny Paulsen	
	Pension Switch		Jane Doe		Switch		Test Description		30/04/2022	Ar	ny Paulsen	
	Comparison with Ex-ante		Jane Doe		Comparison with Ex-ante		Test Description		30/04/2022	Ar	ny Paulsen	
	Test Pension Switch		Client Test		Switch		Test Description		30/04/2022	Ar	ny Paulsen	
	Test Comp with exante		Client Test		Comparison with Ex-ante		test description		27/04/2022	Ar	ny Paulsen	
	Dec Test		Test Client		Comparison with Ex-ante		0		23/12/2021	Ar	ny Paulsen	
	Test Comp Exante Dec		Test Client		Comparison with Ex-ante		Comp Description		01/01/2022	Ar	ny Paulsen	
	Exante Dec		Test Client		Ex-ante		Descr		29/12/2021	Ar	ny Paulsen	

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:

	Pho
	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
0	Ex-ante (Pre-Sales) Select this option to create an Ex-ante (pre-sales) illustration for a single product
e O	Switch Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.
	Cancel

As we have created research within the Research tab, you will need to search for the client:

New F	Research: Comparison with Ex-ante
Information	
 Client bearch Contacts Recent Contacts Iso Jane Doe Test Client Client Test 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:

advisers, paraplanners, compliance and administration staff, part of the Synaptic Pathways research and	🛤 Ms. Test 🔀
New Research: Comparison with Ex-ante	e
Information	
*Client 5	2
* Illustration Name	21
* Territ	
Description	-
Activity Due Date	
Ē	e
Cancel Save & New Save	2

Save:

	New Research: Cor
ormation	
* Client	5
🚥 Test Client	×
* Illustration Name	5
Test Illustration Apr22	
* Term	5
10	
Description	5
Test Description Text	
Activity Due Date	5
31/05/2022	iii iii iii iii iii iii iii iii iii ii
	Cancel Sav

This will take you directly into the research:

Research	Dathways Home	Contacts 🗸 Research 🗸	Portfolio Builder 🗸	Q Search Investment Pathways	Configuration	Fund Lists 🗸	Knowledge Base	My Apps & Settings
Client <u>Test Client</u>	Description Test Description Text	Illustration Type Whole of Market	Segment Name		8 . 7 / 1		1115 011 22	
	Research		Review	v	\rangle	ci	ient Check-In	