

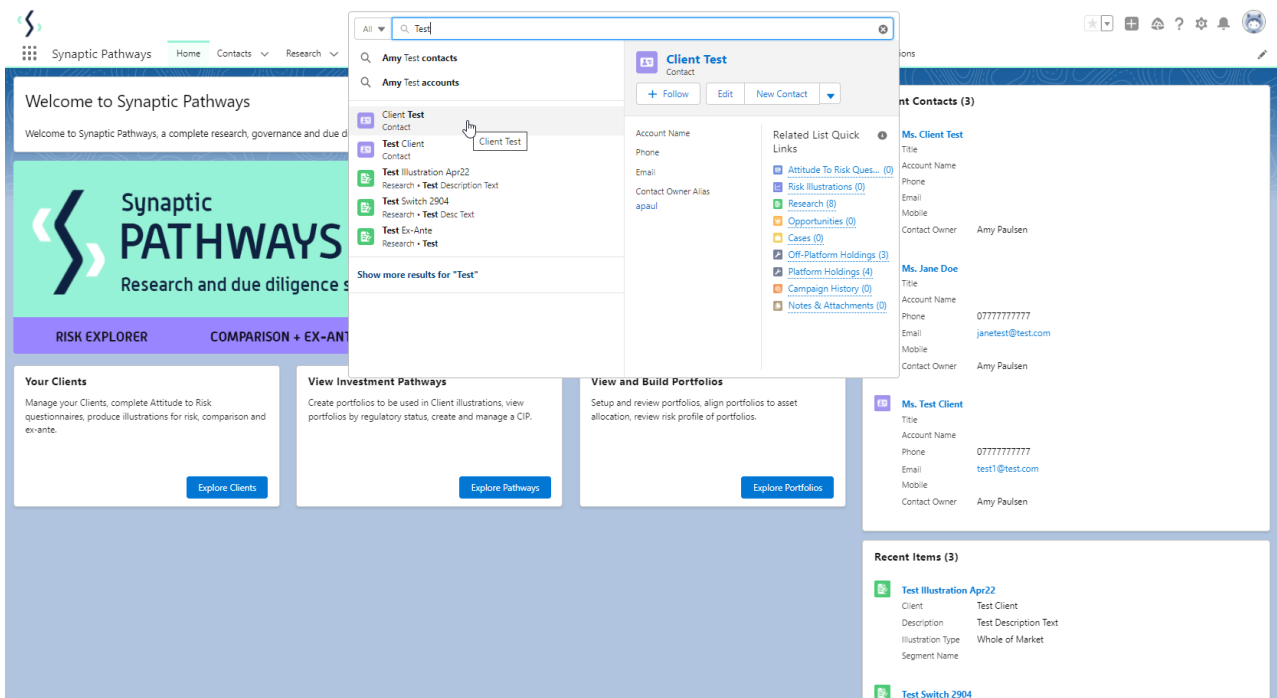
# Comparison & Ex-Ante - Creating within a client record

Last Modified on 26/05/2022 10:18 am BST

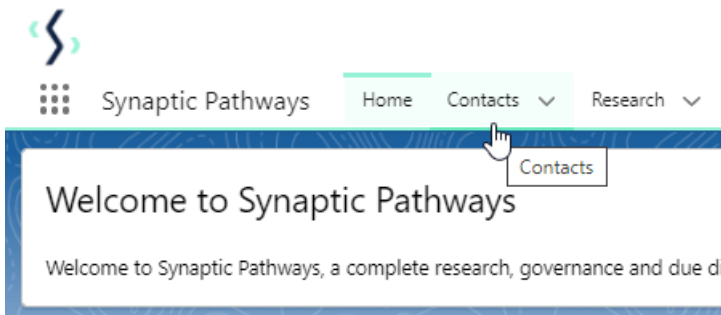
Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create a comparison with ex-ante scenario within a contact record, either:

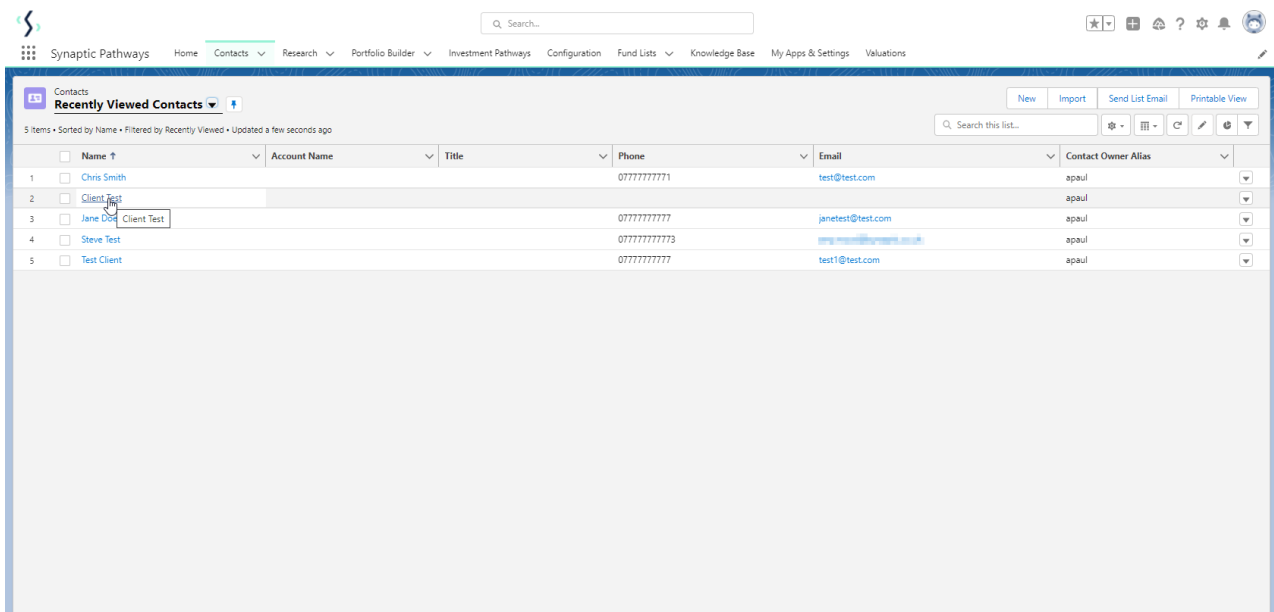
Search for the client in the top search bar:



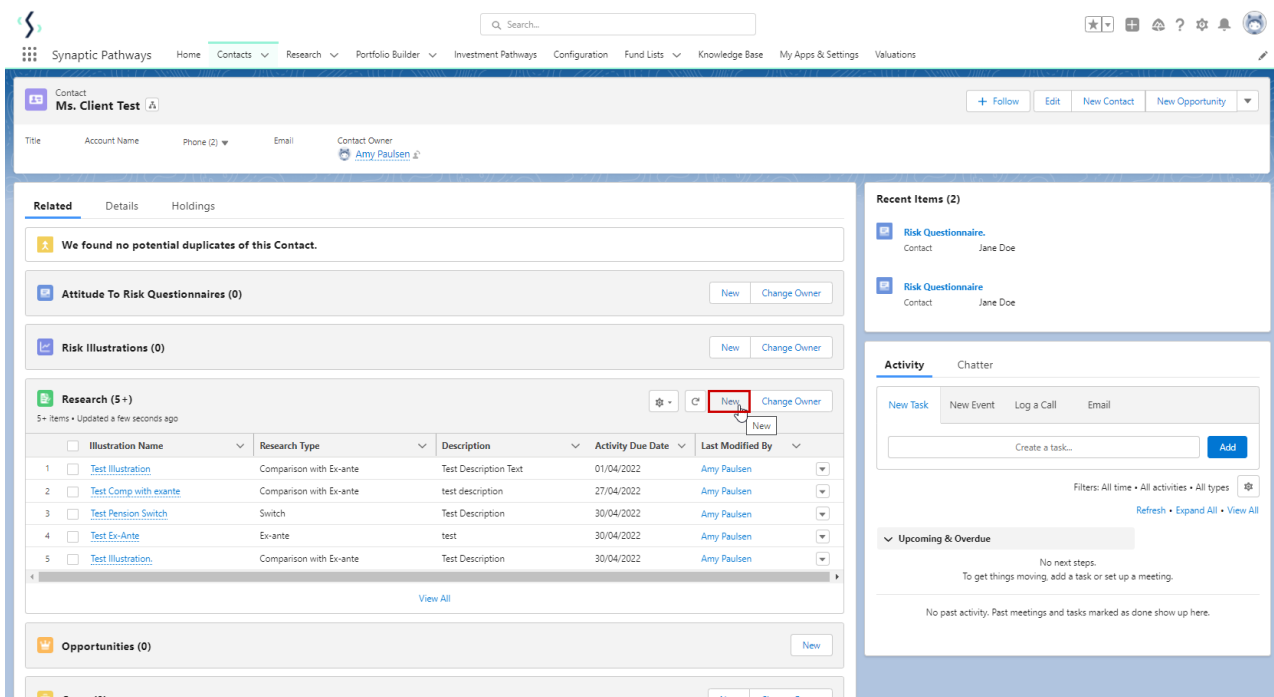
Alternatively, find the client within the **Contacts** tab:



Select the client from the contact list:



Click **New** within the Research area:



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.

The client field will be populated automatically:

**New Research: Comparison with Ex-ante**

**Information**

\* Client

\* Illustration Name

\* Term

Description

Activity Due Date

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

Complete the remaining fields & **Save**:

Contact Owner

## New Research: Comparison with Ex-ante

**Information**

\* Client

\* Illustration Name

\* Term

Description

Activity Due Date

Synaptic Pathways Home **Contacts** Research Portfolio Builder Investment Pathways Configuration Fund Lists Knowledge Base My Apps & Settings

Search...

Ms. Client Test Research "Test Illustration Apr22" was created.

**Related** Details Holdings

**We found no potential duplicates of this Contact.**

**Attitude To Risk Questionnaires (0)**

**Risk Illustrations (0)**

**Research (5+)**    
 5+ items • Updated a minute ago

<input type="checkbox"/>	Illustration Name	Research Type	Description	Activity Due Date	Last Modified By
1	<a href="#">Test Illustration</a>	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen
2	<a href="#">Test Comp with exante</a>	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen
3	<a href="#">Test Pension Switch</a>	Switch	Test Description	30/04/2022	Amy Paulsen
4	<a href="#">Test Ex-Ante</a>	Ex-ante	test	30/04/2022	Amy Paulsen
5	<a href="#">Test Illustration</a>	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen

[View All](#)

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+)** New Change Owner

5+ items • Updated a few seconds ago

<input type="checkbox"/>	Illustration Name	Research Type	Description	Activity Due Date	Last Modified By
1	<a href="#">Test Illustration</a>	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen
2	<a href="#">Test Comp with exante</a>	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen
3	<a href="#">Test Pension Switch</a>	Switch	Test Description	30/04/2022	Amy Paulsen
4	<a href="#">Test Ex-Ante</a>	Ex-ante	test	30/04/2022	Amy Paulsen
5	<a href="#">Test Illustration.</a>	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen

[View All](#)

Synaptic Pathways Search... New Change Owner

Contacts > Client Test 9 items • Updated a few seconds ago

**Research**

<input type="checkbox"/>	Illustration Name	Research Type	Description	Activity Due Date	Last Modified By
1	<a href="#">Test Illustration</a>	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen
2	<a href="#">Test Comp with exante</a>	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen
3	<a href="#">Test Pension Switch</a>	Switch	Test Description	30/04/2022	Amy Paulsen
4	<a href="#">Test Ex-Ante</a>	Ex-ante	test	30/04/2022	Amy Paulsen
5	<a href="#">Test Illustration.</a>	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen
6	<a href="#">Comparison with Ex-Ante.</a>	Ex-ante	Test Description	30/04/2022	Amy Paulsen
7	<a href="#">Test Ex-Ante</a>	Comparison with Ex-ante	Test	30/04/2022	Amy Paulsen
8	<a href="#">Test Switch 2904</a>	Switch	Test Desc Text	30/04/2022	Amy Paulsen
9	<a href="#">Test Illustration Apr22</a>	Comparison with Ex-ante	Test Description Text	30/05/2022	Amy Paulsen

[Test Illustration Apr22](#)

This will take you directly into the research