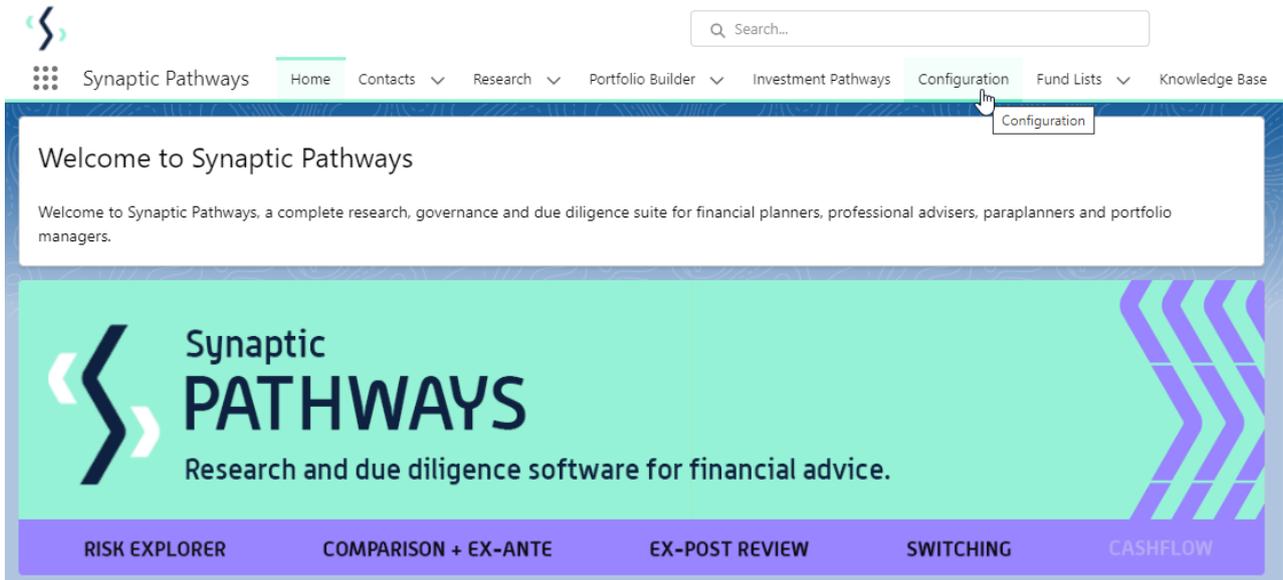


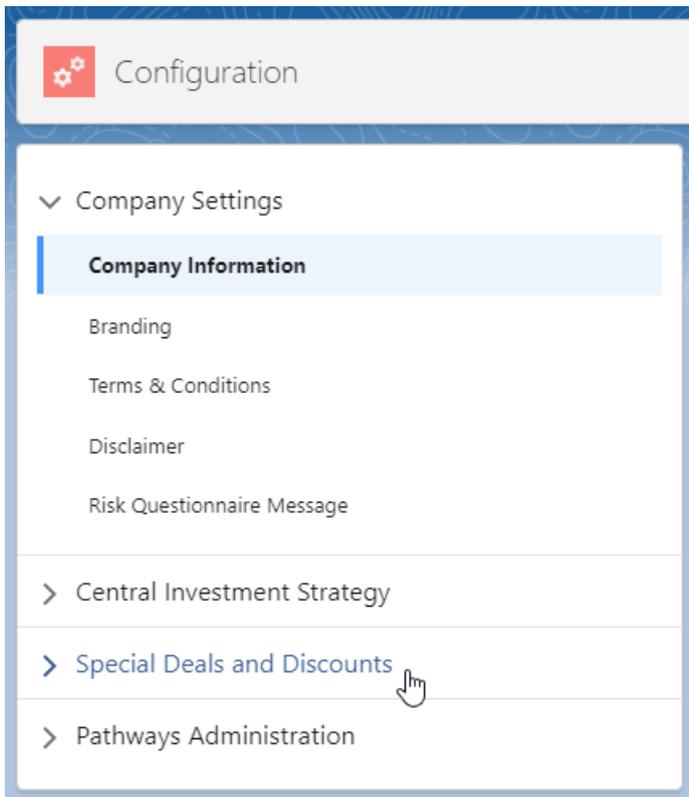
# Creating Special Deals

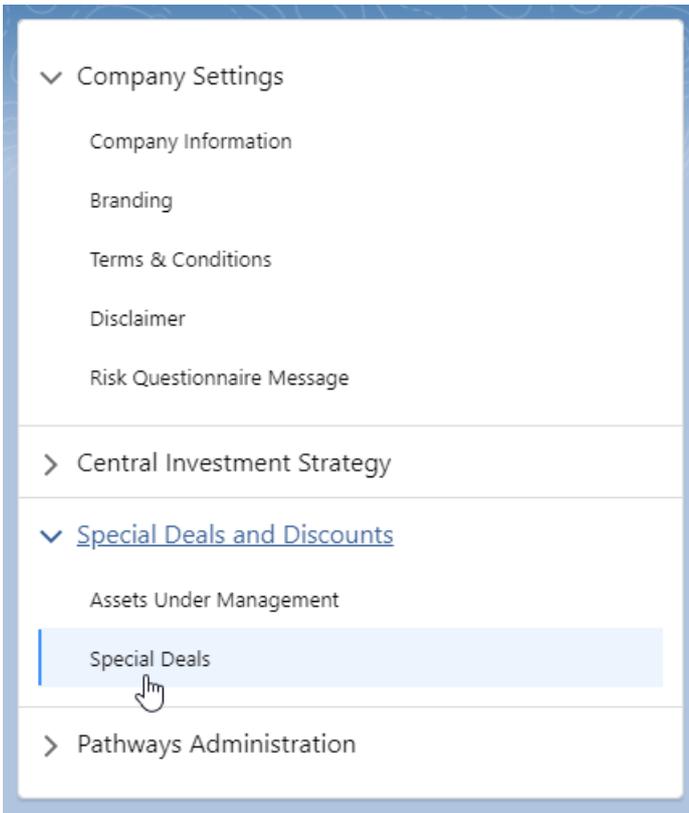
Last Modified on 26/05/2022 1:04 pm BST

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

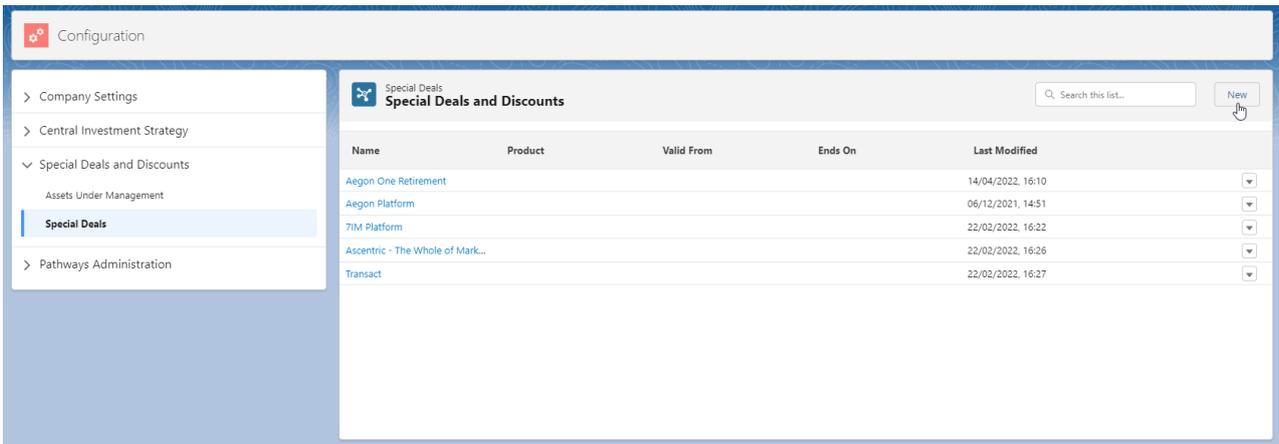


Click into **Special Deals and Discounts**, then **Special Deals**:





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**

Enter Name of Special Deal...

Description

Enter 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**

Aegon Platform

Description

Enter 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 TEST  
**Provider:** Aegon Platform  
**Deal Start Date:** (leave blank to apply from today)  
**Last Modified Date:** Thu, 04 Nov 21  
**Platform:** All Platform Products  
**Deal End Date:** (leave blank for no expiry date)  
**Last Modified By:** Amy Paulsen

**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

▼ AJ Bell Investcentre SIPP

Charge Tier Name: SIPP AMC

View Provider Charges | View Network Charges

Revert to Provider Charges

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

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 configuration page for 'Aegon One Retirement'. The navigation bar at the top includes 'Aegon One Retirement' with a close icon (X) next to it. The main content area is divided into sections for 'Special Deal Charge Type' and 'Special Deal Charge Details'. Under 'Special Deal Charge Type', there are two sections for 'Drawdown AMC' and 'Drawdown AMC 2', each with a table of charge tiers. The 'Drawdown AMC' table has two rows: one with a rate of 0.30 and another with a rate of 0.00. The 'Drawdown AMC 2' table has one row with a rate of 75.00. To the right, there is an 'About Special Deal' section with instructions on how to edit and revert special deals.

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