

# Comparison & Ex-Ante using a CIP - Creating through the homepage

Last Modified on 26/05/2022 10:45 am BST

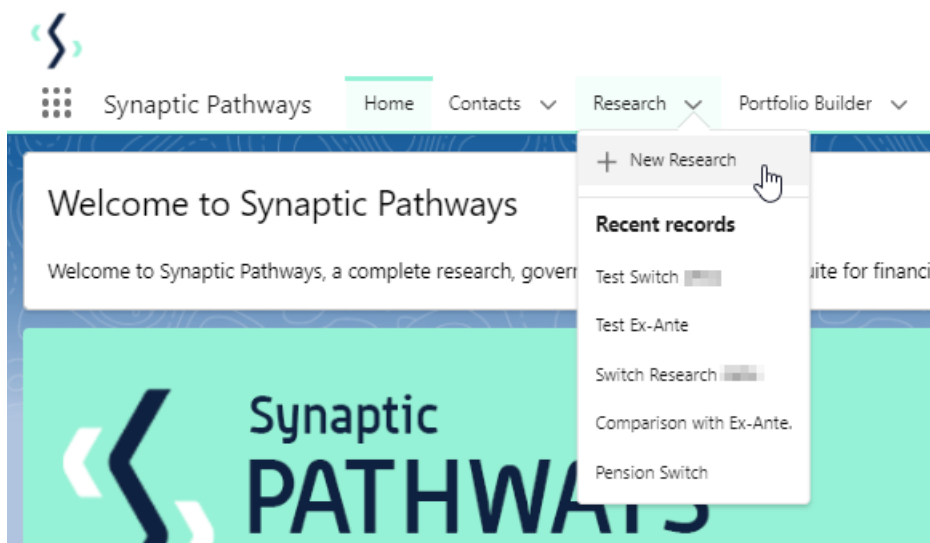
This article explains how to create Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup the CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles [here](#).

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

To create comparison with ex-ante research (using a Central Investment Proposition) 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 through 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

\* Illustration Name

\* Term

Description

Activity Due Date

Cancel Save & New Save

**Save:**

### New Research: Comparison with Ex-ante

Information

\* Client

\* Illustration Name

\* Term

Description

Activity Due Date

Cancel Save & New Save

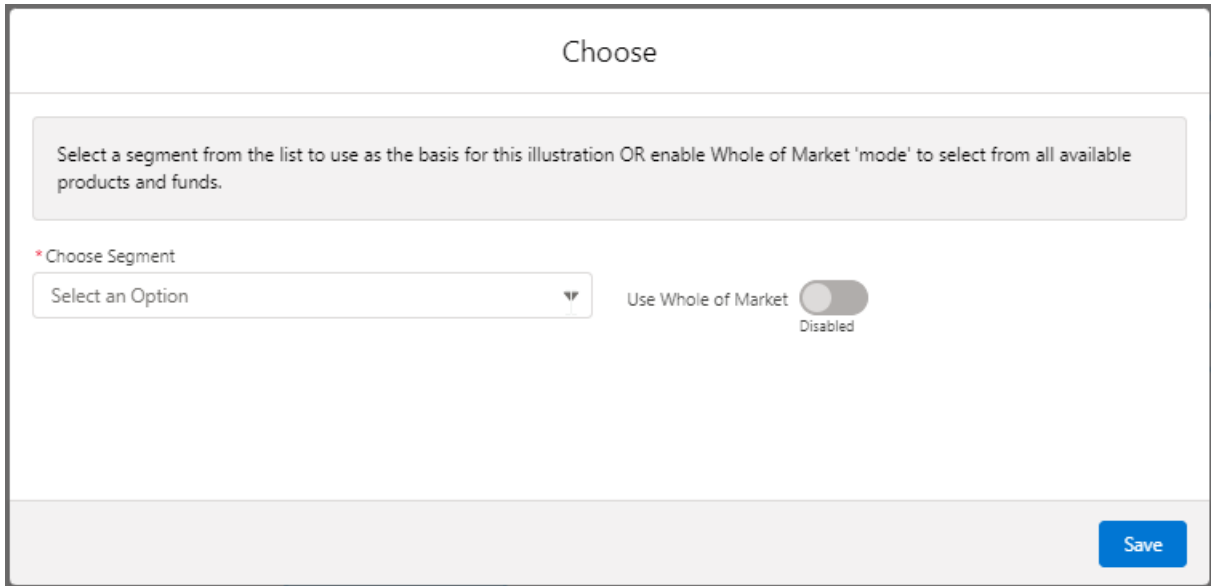
Search...

Investment Pathways Configuration Fund Lists Knowledge Base My Apps & Settings

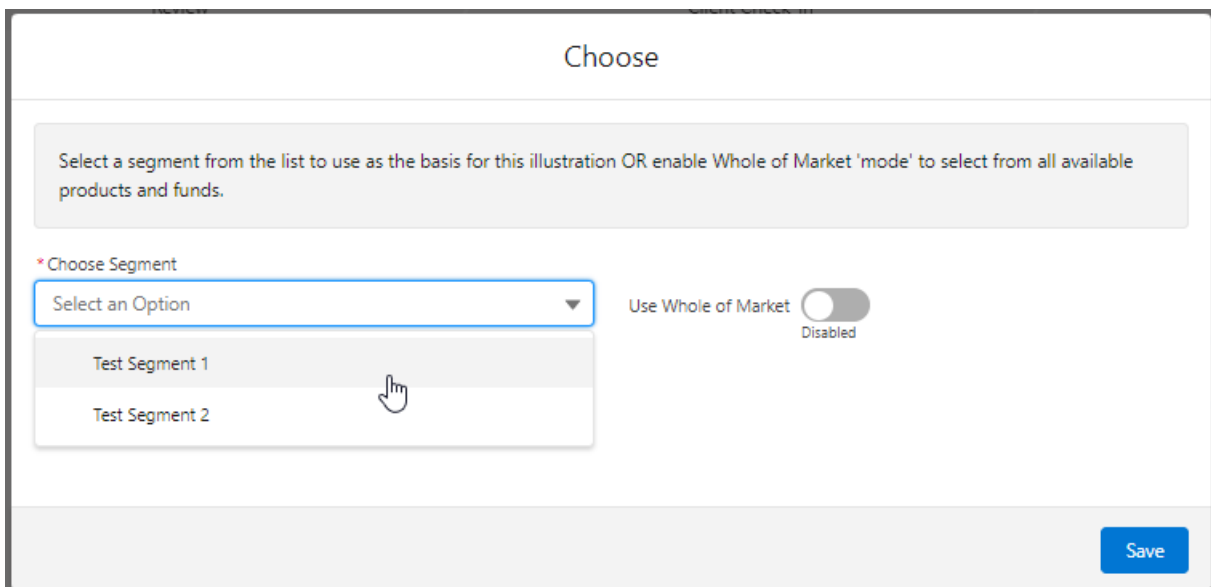
✓ Research "Test Illustration CIP" was created. ✕

As we have configured a Central Investment Proposition, we will need to choose whether to use a segment or conduct Whole of Market research:

Please note - If the whole of market button cannot be enabled, you do not have the permissions to overwrite the segment/s assigned to you in the CIP. Your Administrator can assign this for you. Article **Pathways Administrator - Assigning Whole of Market permissions** explains how this is applied to your account.



The screenshot shows a form titled "Choose". At the top, there is a grey instruction box: "Select a segment from the list to use as the basis for this illustration OR enable Whole of Market 'mode' to select from all available products and funds." Below this, there is a label "\* Choose Segment" followed by a dropdown menu with the text "Select an Option" and a downward arrow. To the right of the dropdown is a toggle switch labeled "Use Whole of Market" which is currently in the "Disabled" position. At the bottom right of the form is a blue "Save" button.



This screenshot is similar to the one above, but the dropdown menu is open. The menu contains two options: "Test Segment 1" and "Test Segment 2". A mouse cursor is hovering over "Test Segment 2". The "Use Whole of Market" toggle remains disabled. The "Save" button is still present at the bottom right.

Once the segment is selected, **Save**

This will take you directly into the research:

Synaptic Pathways Home Contacts Research Portfolio Builder Investment Pathways Configuration Fund Lists Knowledge Base My Apps & Settings Valuations Central Investment Propos...

Search...

Research **Test Illustration CIP** Convert to Holding

Client	Description	Illustration Type	Segment Name
Client Test	Test Description	Segment	Test Segment 1

Research Review Client Check-in Report Mark Status as Complete

Investments Switches/Trades Fees

Add Investment +

Add the investment details for a wrapper or choose from the available platforms or off platform products to create a comparison or illustration. Choose the segment, target risk category, funds and fees.

Synaptic

Ex-ante Results

Add or include investments to see comparison results.

Cancel Continue to Ex-ante Illustration

The segment will be displayed at the top of the screen:

Research **Test Illustration CIP**

Client	Description	Illustration Type	Segment Name
Client Test	Test Description	Segment	Test Segment 1