

Comparison & Ex-Ante using a CIP - Creating research within a client record

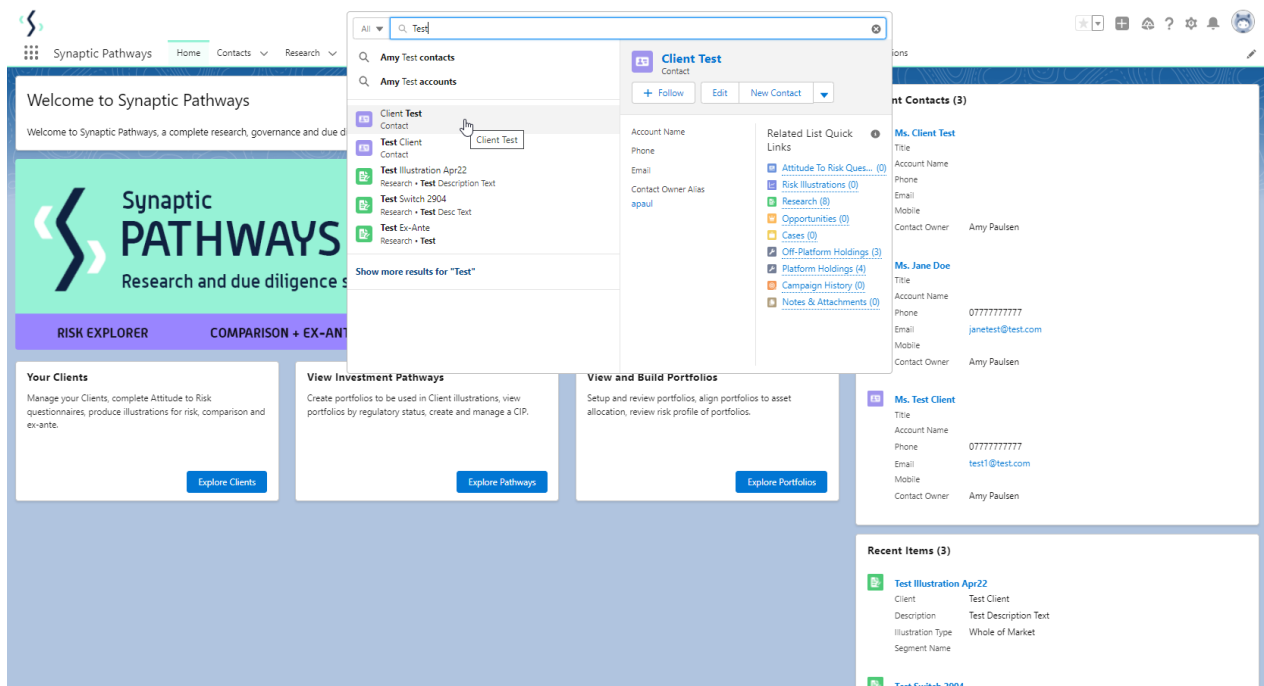
Last Modified on 26/05/2022 10:47 am BST

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](#).

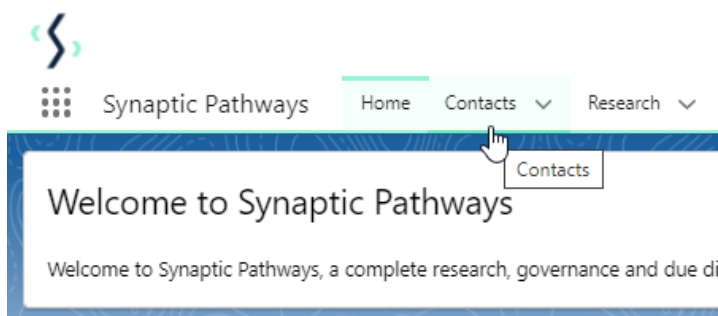
Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

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

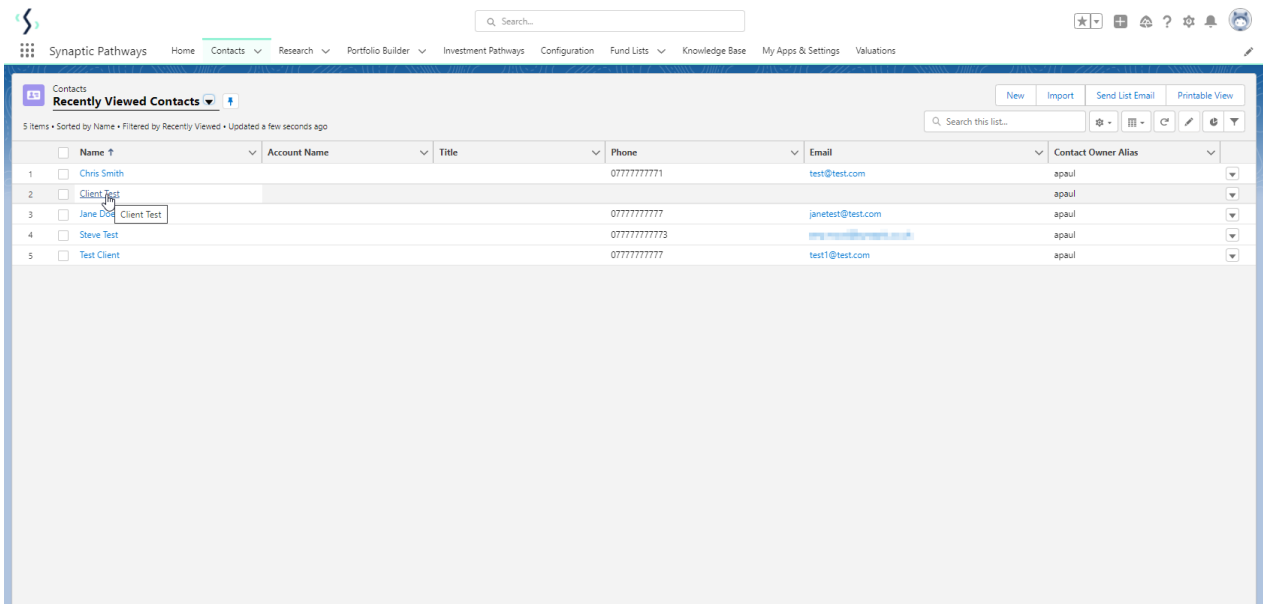
Search for the client in the top search bar:



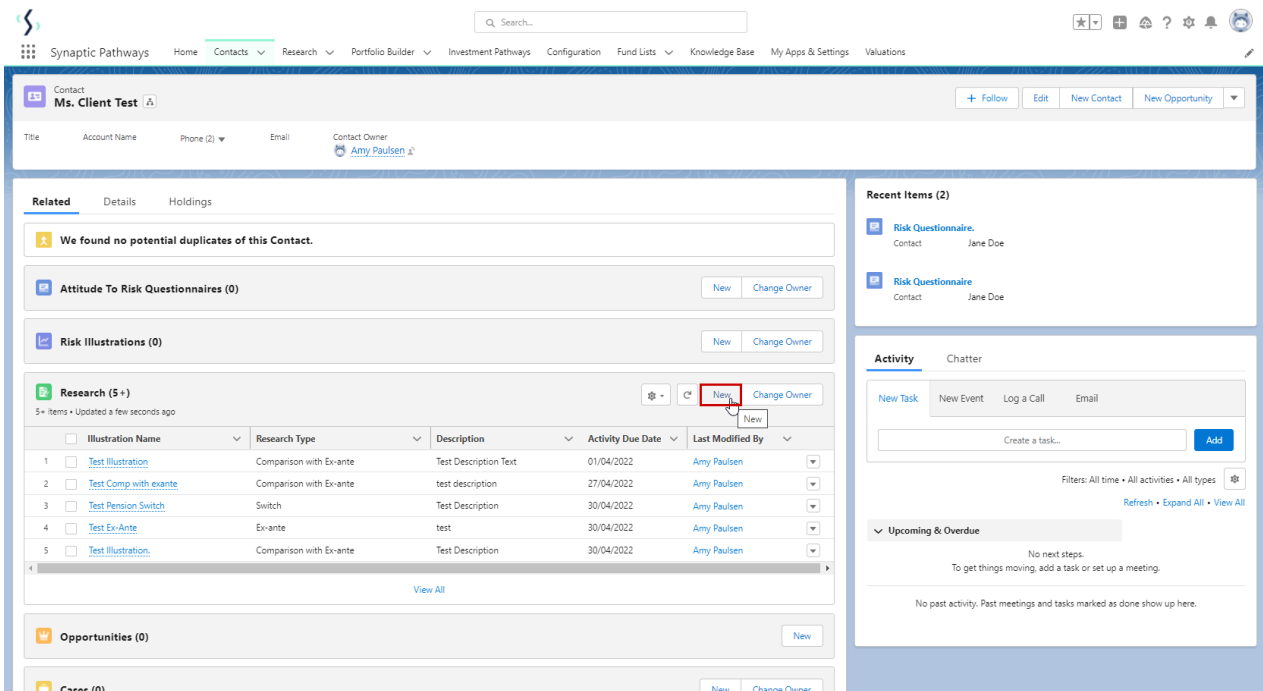
Alternatively, find the client within the Contacts tab:



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 automatically be completed

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...

Contact **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	Test Illustration	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen
2	Test Comp with exante	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen
3	Test Pension Switch	Switch	Test Description	30/04/2022	Amy Paulsen
4	Test Ex-Ante	Ex-ante	test	30/04/2022	Amy Paulsen
5	Test Illustration	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen

[View All](#)

Click into the Research:

Illustration Name	Research Type	Description	Activity Due Date	Last Modified By
1 <input type="checkbox"/> Test Illustration 1		Test Descr	12/12/2021	User User
2 <input type="checkbox"/> Test Illustration Nov21 3		Test Description Text	26/11/2021	User User
3 <input type="checkbox"/> Test Illustration Nov 21		Test Description Text	30/11/2021	User User

Client	Description
Test Client	Test Description Text
Illustration Type	Segment Name
Whole of Market	

As we have configured a Central Investment Strategy, we will need to choose whether we 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.

Choose

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.

* Choose Segment

Select an Option

Use Whole of Market Disabled

[Save](#)

Choose

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.

* Choose Segment

Select an Option

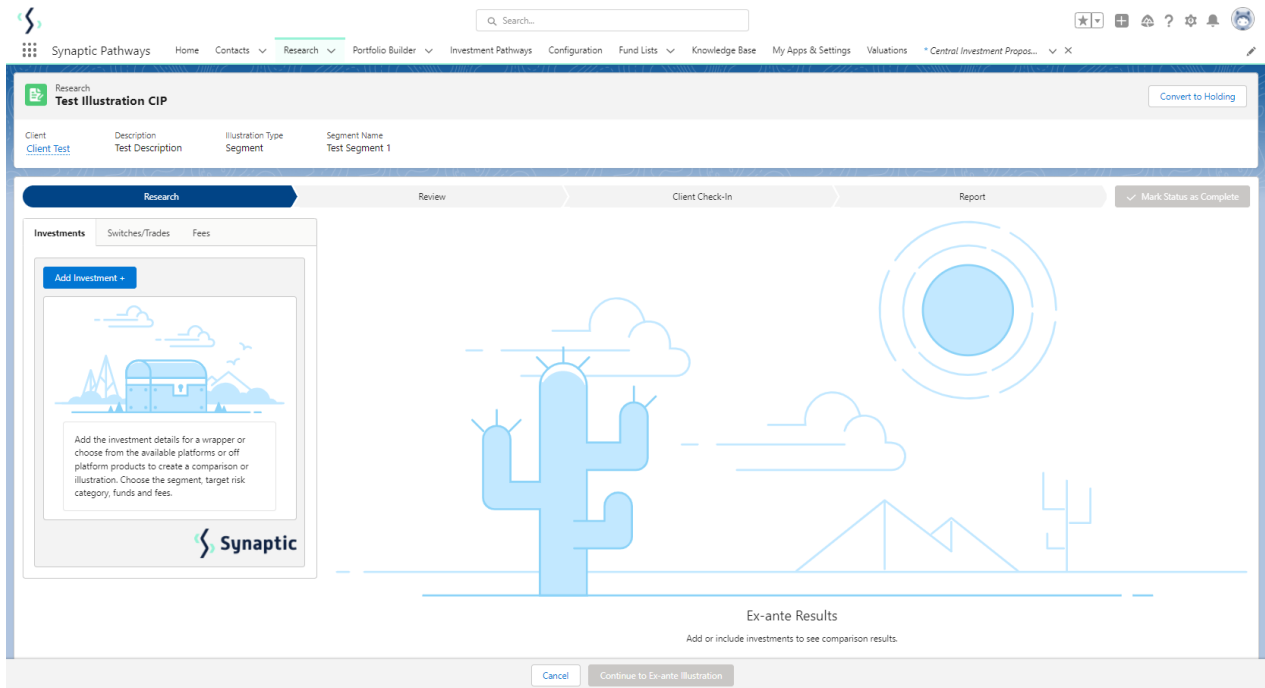
Test Segment 1
 Test Segment 2

Use Whole of Market Disabled

[Save](#)

Once the segment is selected, **Save**

This will take you directly into the research:



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

