

Ex-Ante - Creating through the homepage

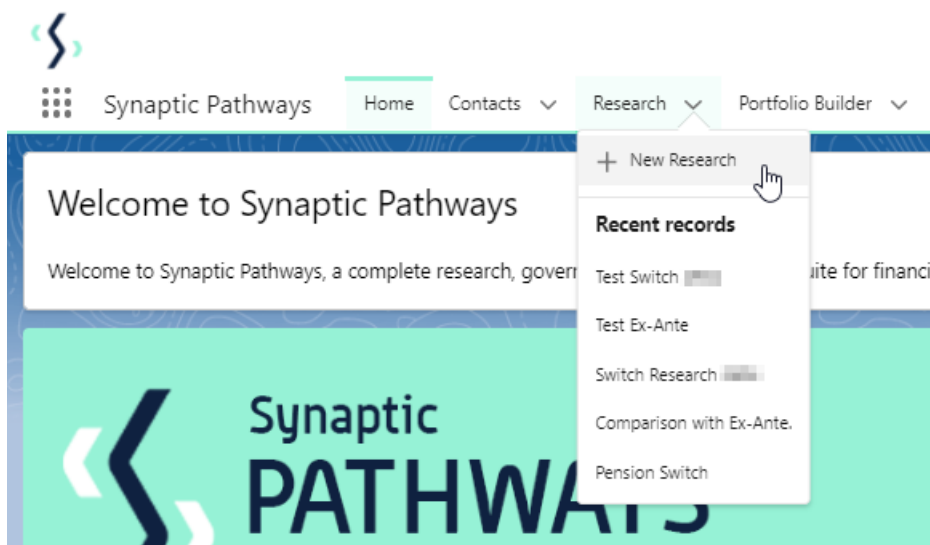
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Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create an Ex-ante scenario 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.

In this example, we are creating an Ex-ante (Pre-Sales) scenario:

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.

As we have created the research directly from the homepage, you will need to search for the client:

New Research: Ex-ante (Pre-Sales)

Information

*Client

- Show All Results for "cli"
- Client Test
- Test Client
- Test Client A
- [Redacted]
- New Contact

Activity Due Date

Note - **Client** field will already be completed if research is created in the contact record.

Complete the remaining fields:

New Research: Ex-ante (Pre-Sales)

Information

* Client ↶
 ✕

* Illustration Name

* Term ↶

Description

Activity Due Date
 📅

Save:

New Research: Ex-ante (Pre-Sales)

Information

* Client ↶
 ✕

* Illustration Name ↶

* Term ↶

Description ↶

Activity Due Date ↶
 📅

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

Search...

Research **Test Illustration Ex-ante Apr22** Research "Test Illustration Ex-ante Apr22" was created.

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

If using 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.

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**.