

# Ex-Ante - Creating in the Research tab

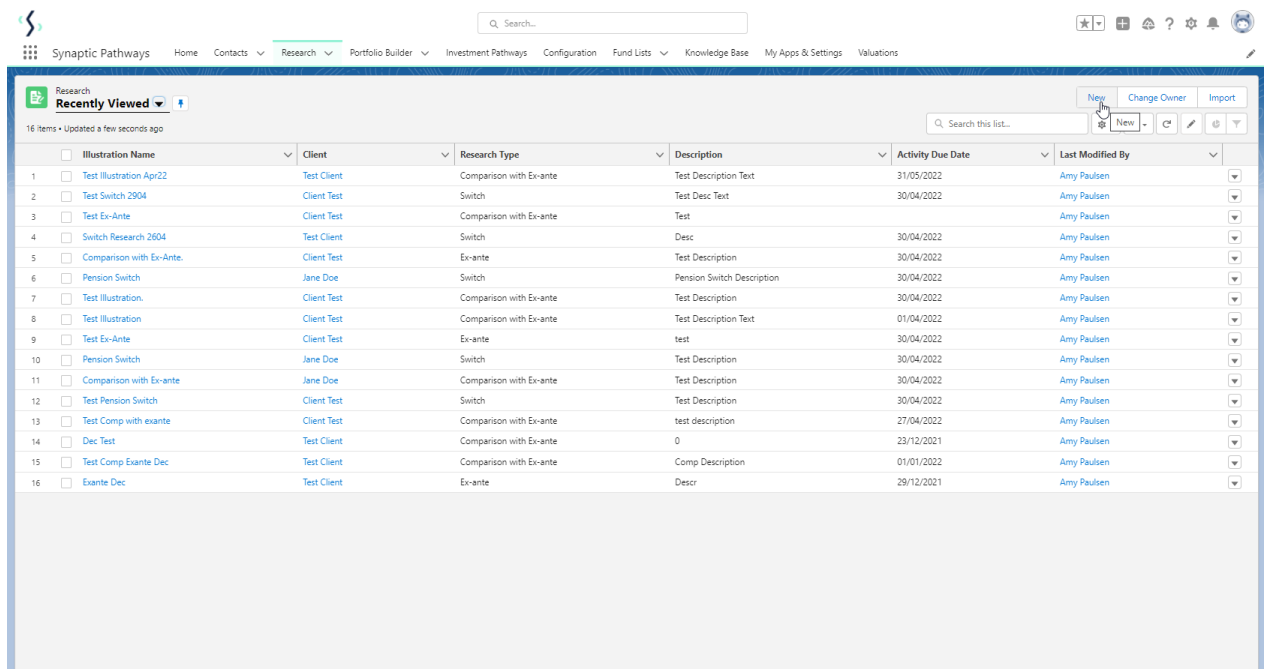
Last Modified on 26/05/2022 11:51 am BST

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

To create an Ex-ante scenario in the Research tab, click into the tab from the Homepage:



All existing research will be listed. Click **New** to create 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 research within the Research tab, 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
- 

+ 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 ↶  
ES Client Test ×

\* Illustration Name

\* Term ↶

Description

Activity Due Date  
📅

Cancel Save & New Save

**Save:**

### New Research: Ex-ante (Pre-Sales)

Information

\* Client ↶  
ES Client Test ×

\* Illustration Name ↶  
Test Illustration Ex-ante Apr22

\* Term ↶  
10

Description ↶  
Test Description Text

Activity Due Date ↶  
31/05/2022 📅

Cancel Save & New Save Save

This will take you directly into the research:

The first screenshot shows the Synaptic Pathways interface with the 'Research' tab selected. A green notification banner at the top right states 'Research "Test Illustration Text" was created.' Below this, a table displays the following details:

Client	Description	Illustration Type	Segment Name
<a href="#">Test Client</a>	Test Description Text	Whole of Market	

The second screenshot shows the same interface with the 'Research' tab selected. A green notification banner at the top right states 'Research "Test Illustration Ex-ante Apr22" was created.' Below this, a table displays the following details:

Client	Description	Illustration Type	Segment Name
<a href="#">Client Test</a>	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

Use Whole of Market  Disabled

Test Segment 1

Test Segment 2

Save

Once the segment is selected, **Save**.

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