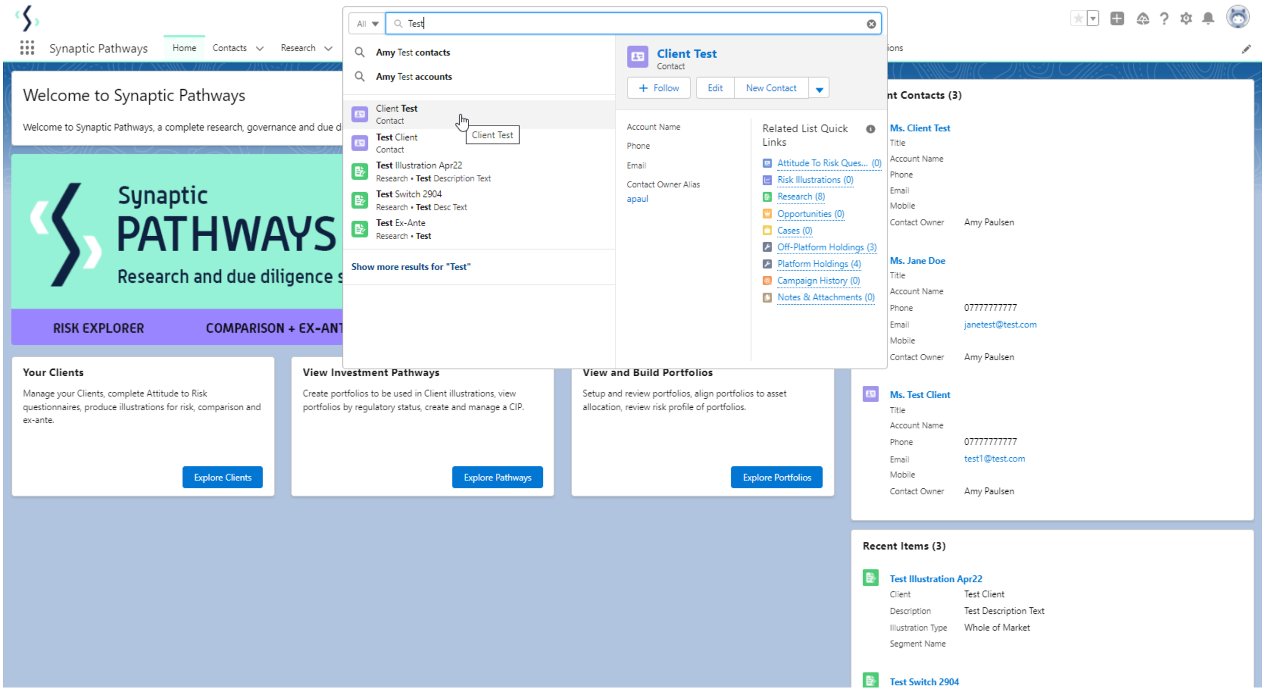
Ex-Ante - Creating research within a client record

Last Modified on 26/05/2022 11:52 am BST

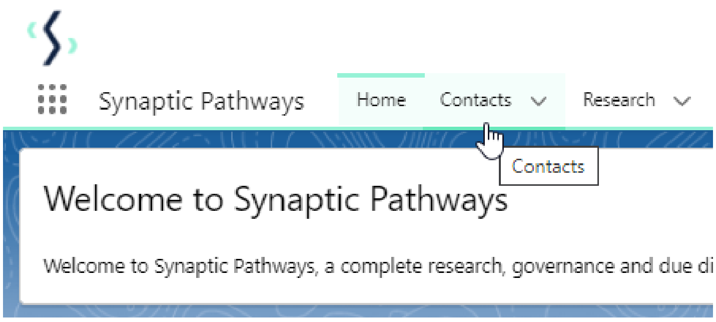
Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

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

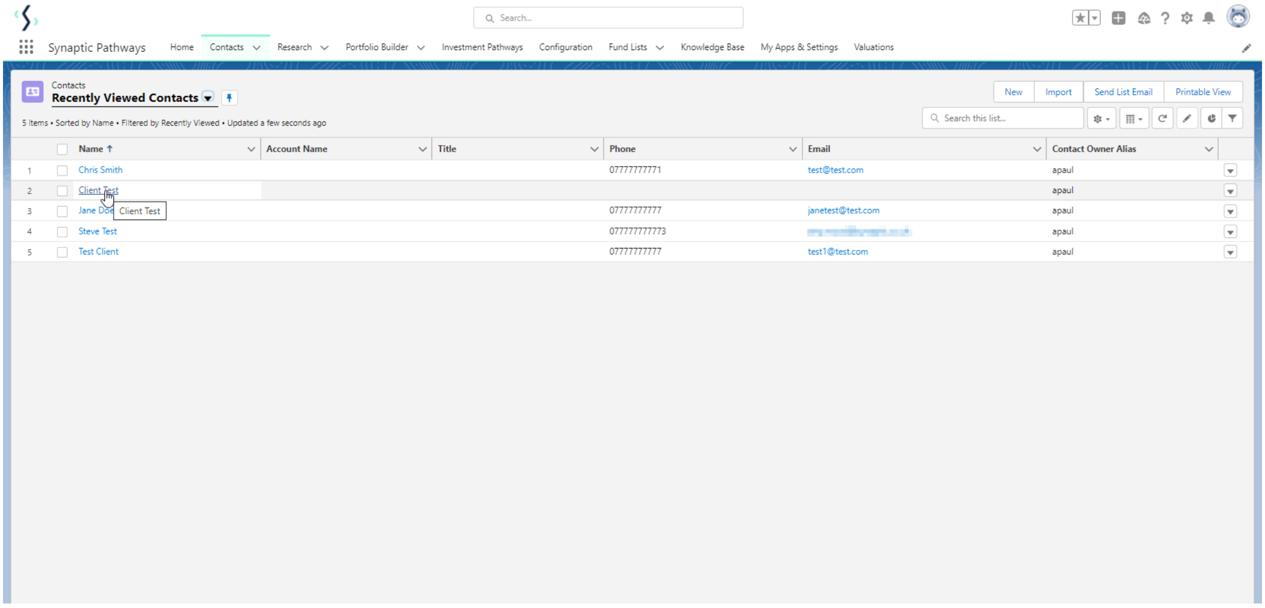
Search for the client in the top search bar:



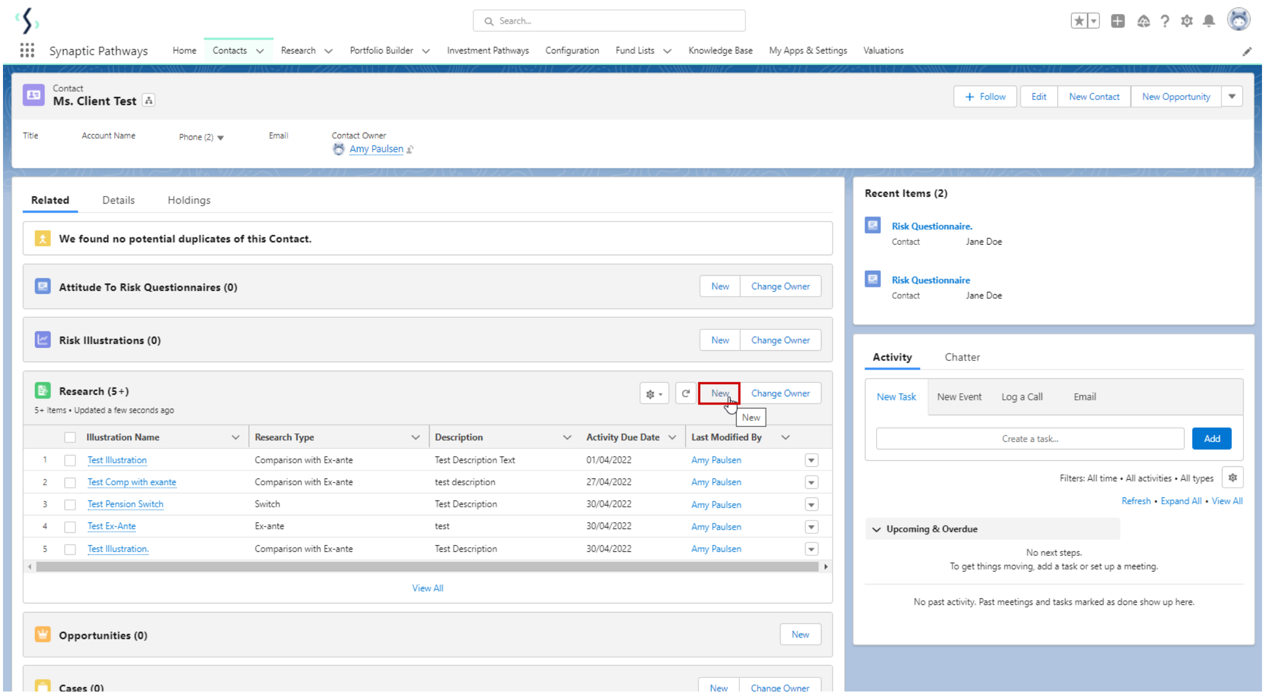
Alternatively, find the client within the **Contacts** tab:



Select the client from the contact list:

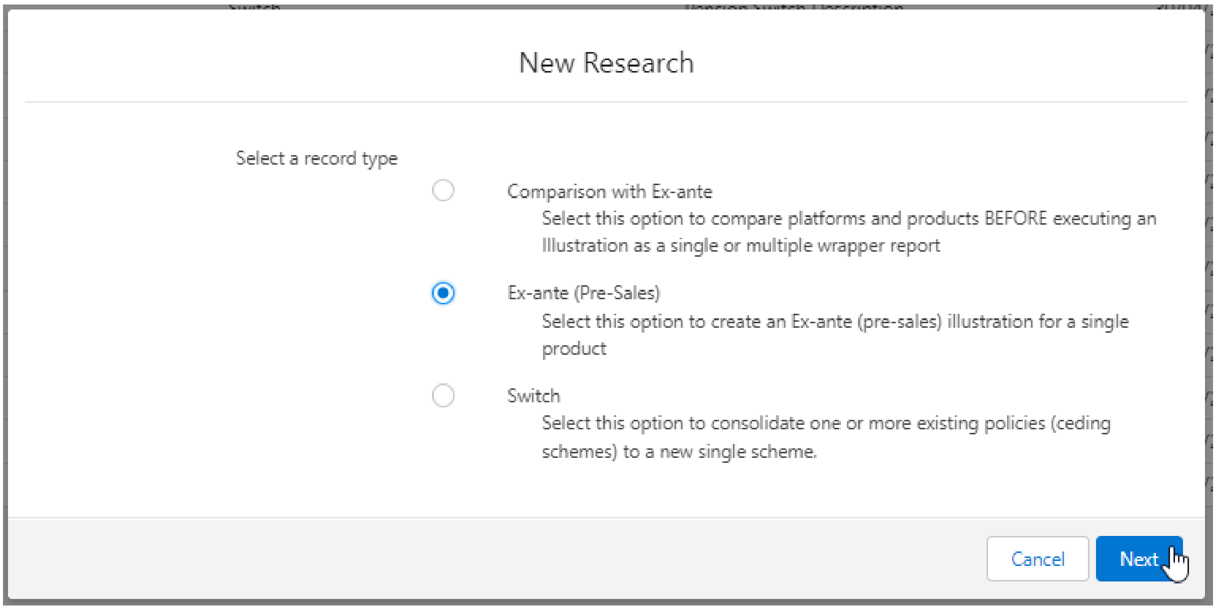


Click **New** within the Research area:

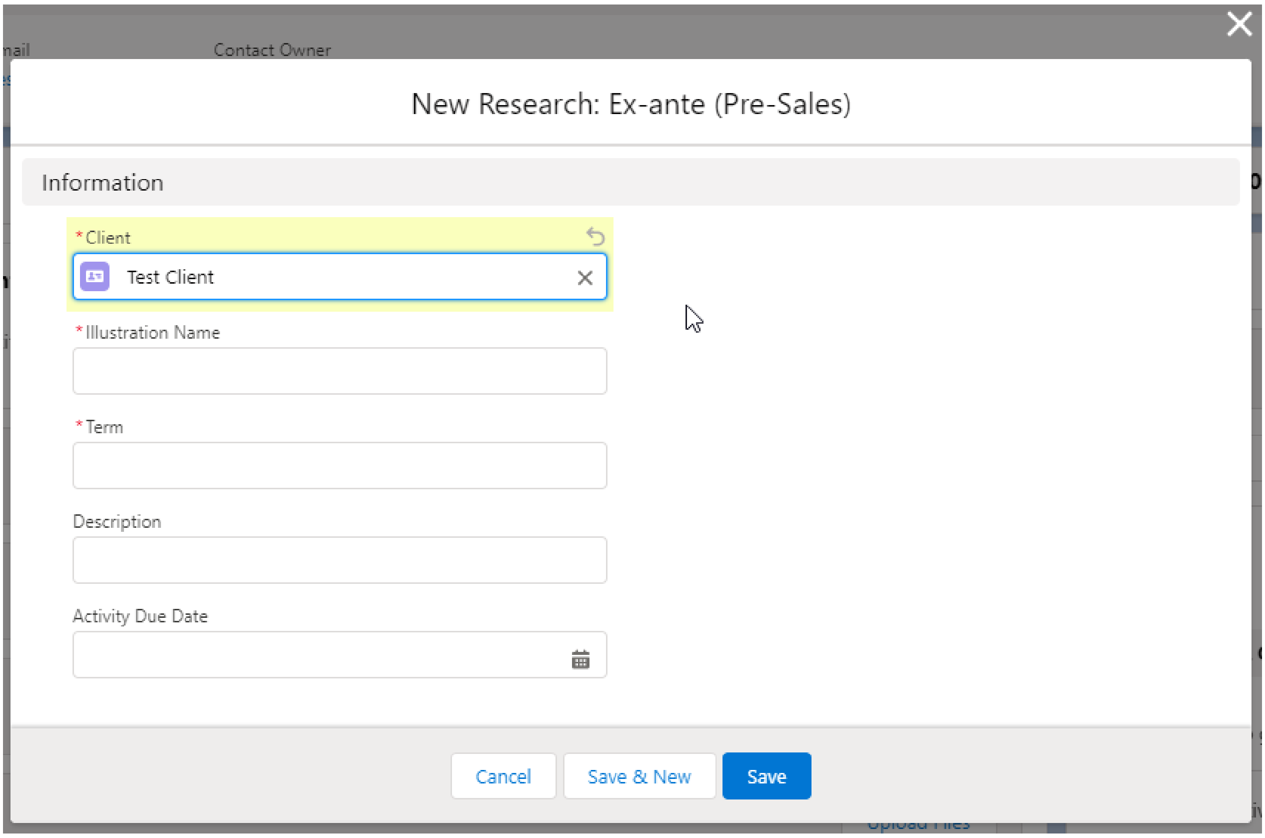


If you would like to run a comparison with an ex-ante report, select the first option. If you wish to create an ex-ante report without the comparison, select the second option:

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

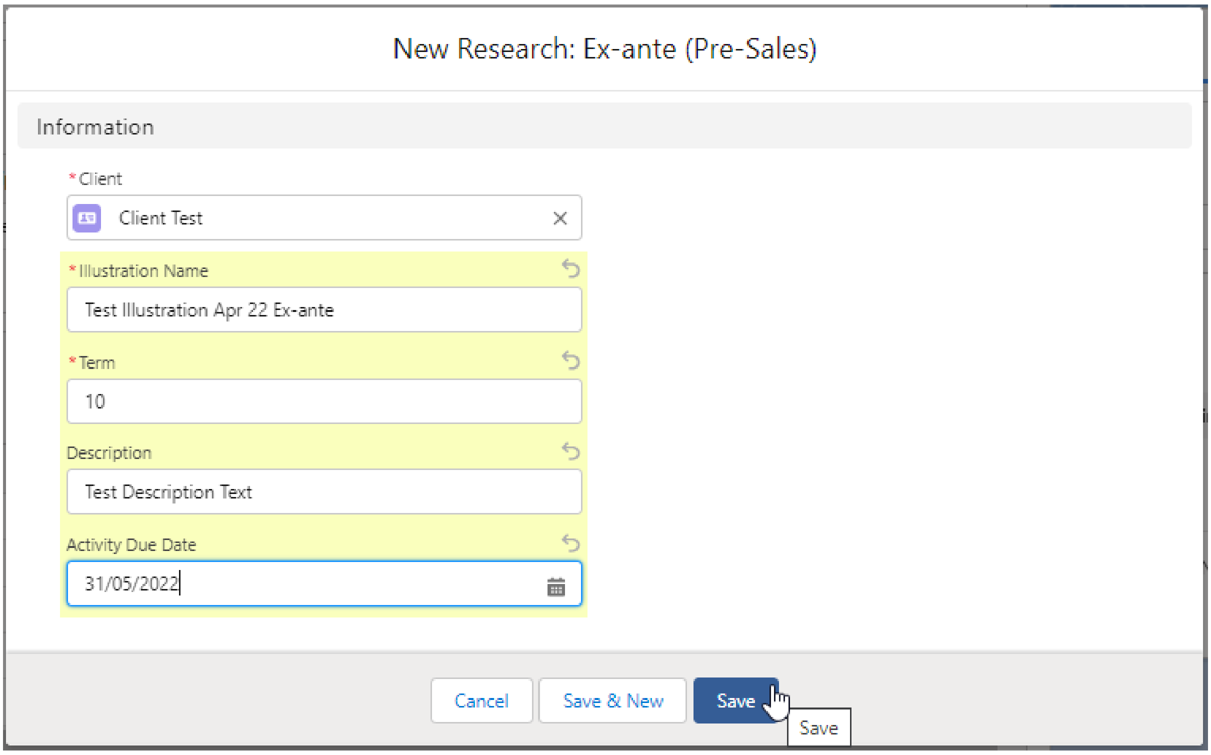


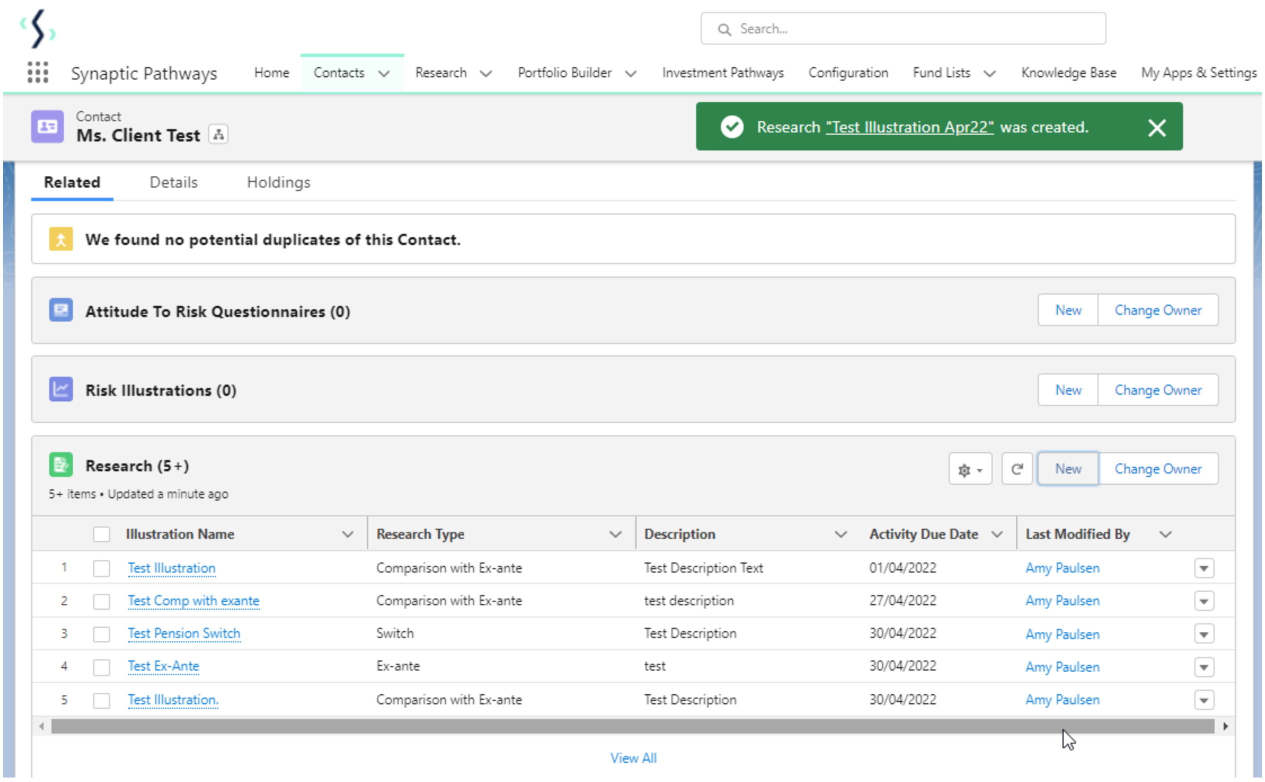
The client field will be populated automatically:



Note - **Client** field will not be completed if research has been created through the Research tab or homepage.

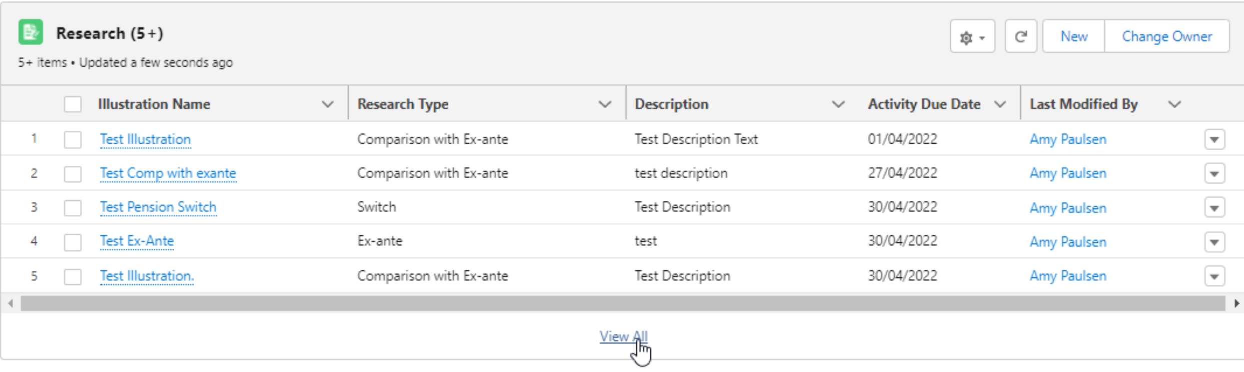
Complete the remaining fields & **Save:**

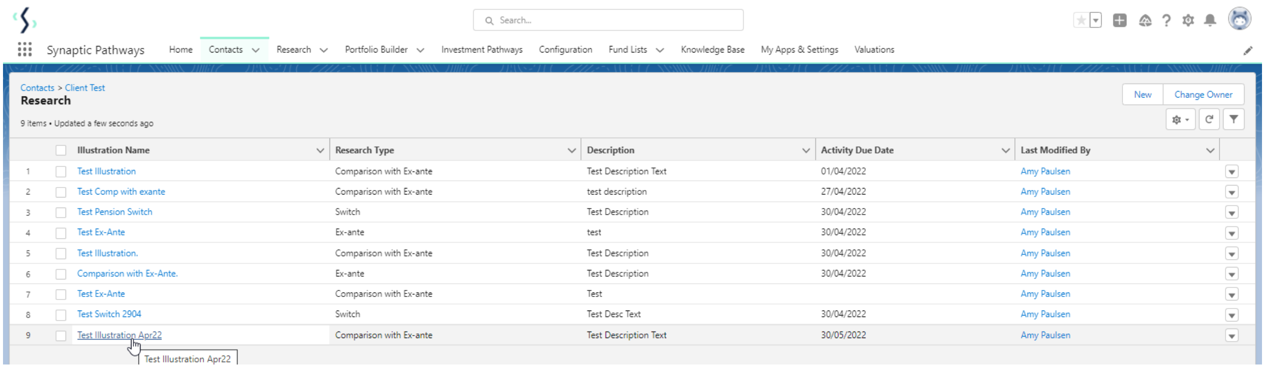




This will add the research to the Research list. Click into the Illustration name to open:

Please note: You may have to view all if it is not listed on the details page.





This will take you directly into the research