

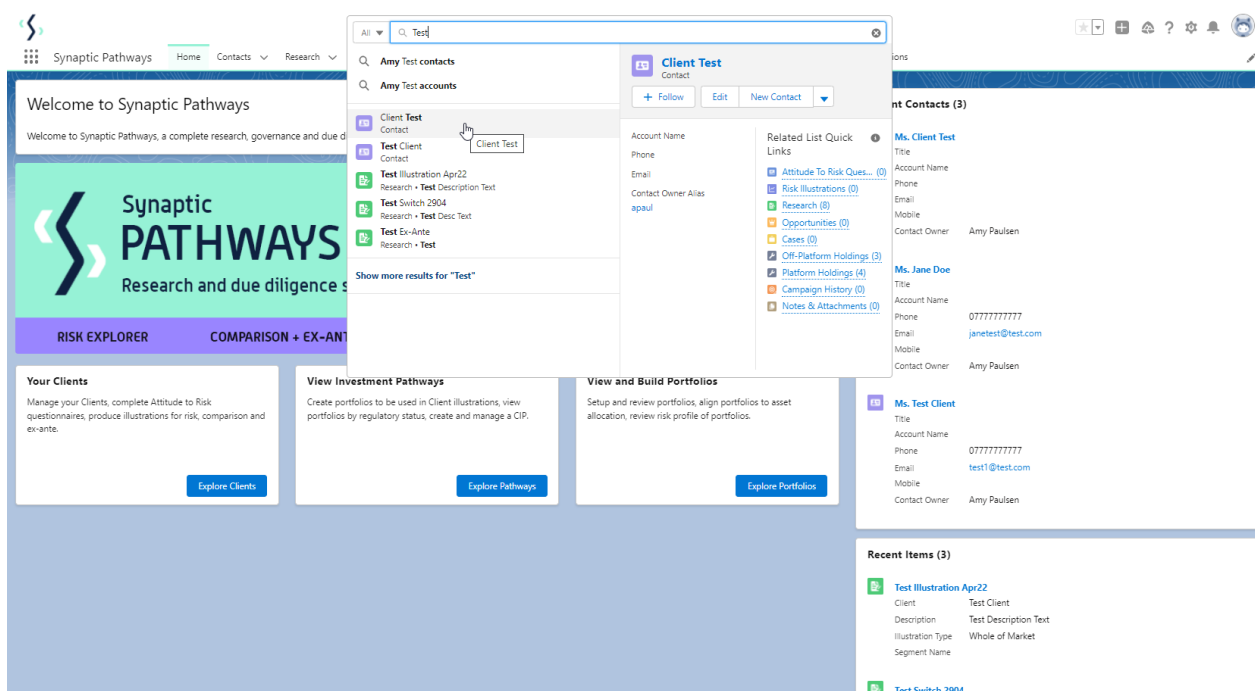
Ex-Ante - Creating research within a client record

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

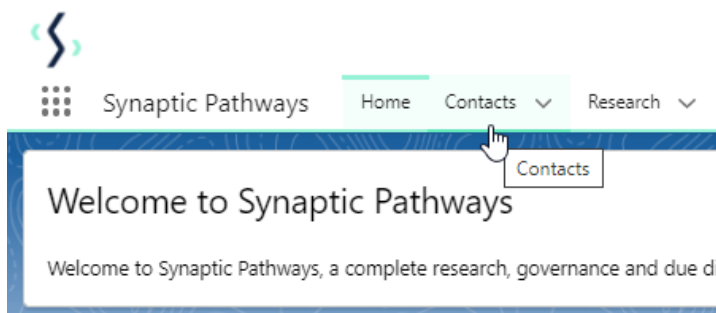
Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

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

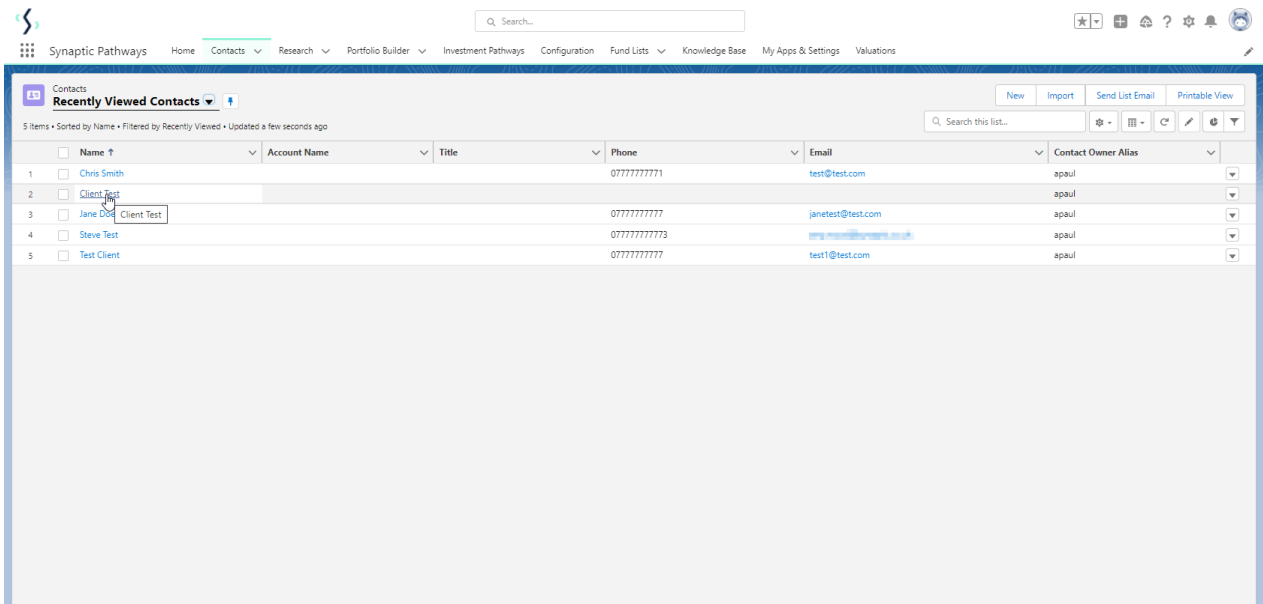
Search for the client in the top search bar:



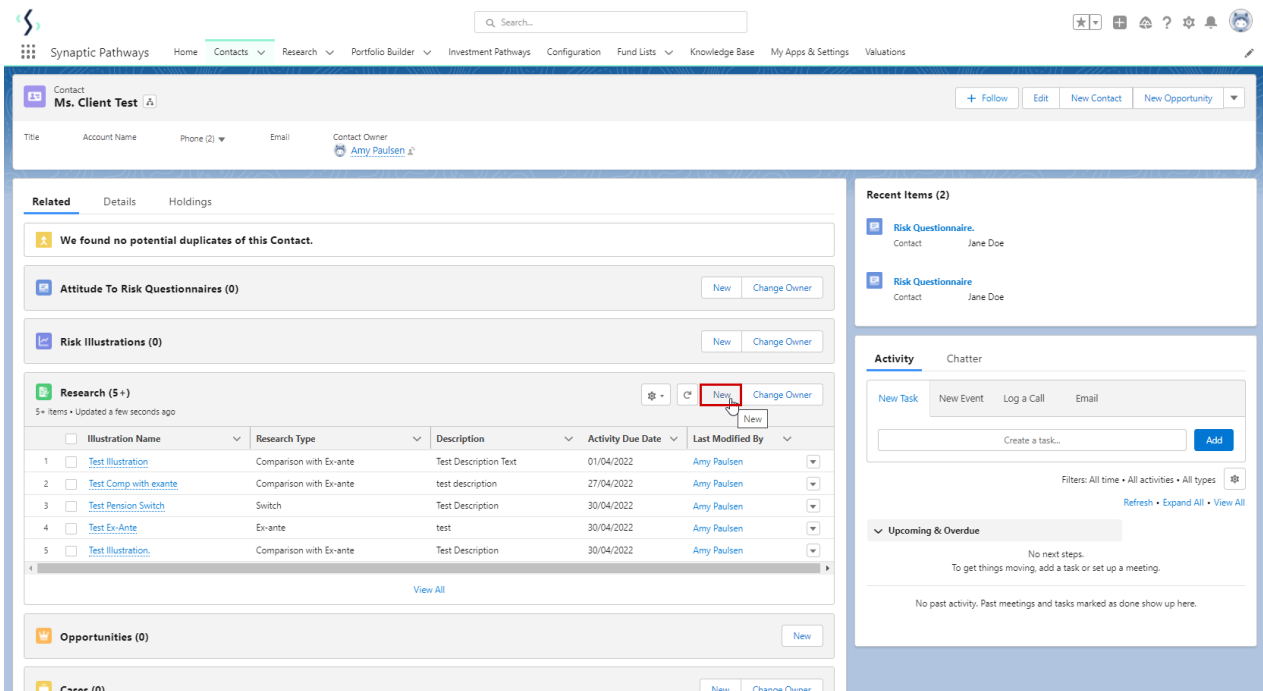
Alternatively, find the client within the **Contacts** tab:



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:

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 be populated automatically:

New Research: Ex-ante (Pre-Sales)

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:**

New Research: Ex-ante (Pre-Sales)

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

Synaptic Pathways
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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)** [New](#) [Change Owner](#)

📄 **Risk Illustrations (0)** [New](#) [Change Owner](#)

📄 **Research (5+)** [New](#) [Change Owner](#)

5+ Items • Updated a minute ago

	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](#)

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.

Research (5+) ☆ ⌵ New Change Owner

5+ Items • Updated a few seconds 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](#)

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

Q Search...

Contacts > Client Test

Research New Change Owner

9 Items • Updated a few seconds 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
6	Comparison with Ex-Ante.	Ex-ante	Test Description	30/04/2022	Amy Paulsen
7	Test Ex-Ante	Comparison with Ex-ante	Test	30/04/2022	Amy Paulsen
8	Test Switch 2904	Switch	Test Desc Text	30/04/2022	Amy Paulsen
9	Test Illustration Apr22	Comparison with Ex-ante	Test Description Text	30/05/2022	Amy Paulsen

This will take you directly into the research