

# Comparison & Ex-Ante - Creating through the homepage

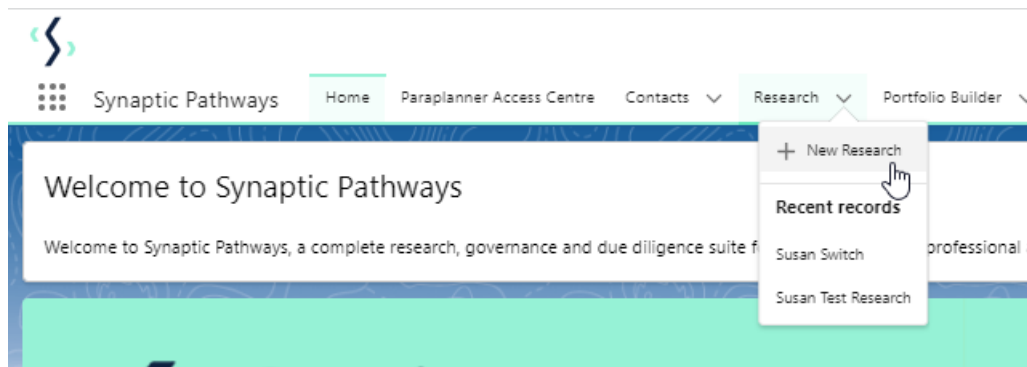
Last Modified on 13/02/2024 3:34 pm GMT

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 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:

The screenshot shows a 'New Research' form with the following content:

- 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.

At the bottom right, there are 'Cancel' and 'Next' buttons.

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

The screenshot shows the 'New Research: Comparison with Ex-ante' form. The 'Client' field is highlighted with a search dropdown menu. The dropdown contains the following items:

- Search Contacts...
- Recent Contacts
  - Susanna West
  - Test Client
  - Test Client1
  - Steve Test
  - Ben Smith
- + New Contact

At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

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

Complete the remaining fields:

New Research: Comparison with Ex-ante

\* = Required Information

Information

\* Client

\* Illustration Name

\* Term

Description

Activity Due Date

**Save:**

New Research: Comparison with Ex-ante

\* = Required Information

Information

\* Client

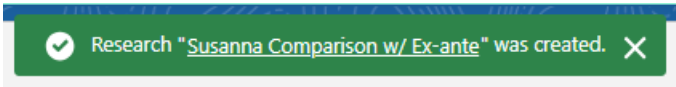
\* Illustration Name

\* Term

Description

Activity Due Date

This will take you directly into the research:



If using a Central Investment Proposition, Choose a segment:

### 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

Segment 1

Save

If you would like to create Whole of Market research, select **Use Whole of Market**

### 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  Enable

Complete this field.

Save

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Q Search...

?

**Susanna Comparison w/ Ex-ante**

Convert to Holding

Client	Description	Illustration Type	Segment Name	Policy Type
Susanna West	Text Description Text	Whole of Market		

Add Investment

Add the investment details for a wrapper or choose from the available platforms or off-platform products to create a comparison or illustration. Choose the segment, target risk category, funds and fees.

Synaptic

**Ex-ante Results**  
 Add or include investments to see comparison results.

Cancel

Continue to Ex-ante Illustration

