

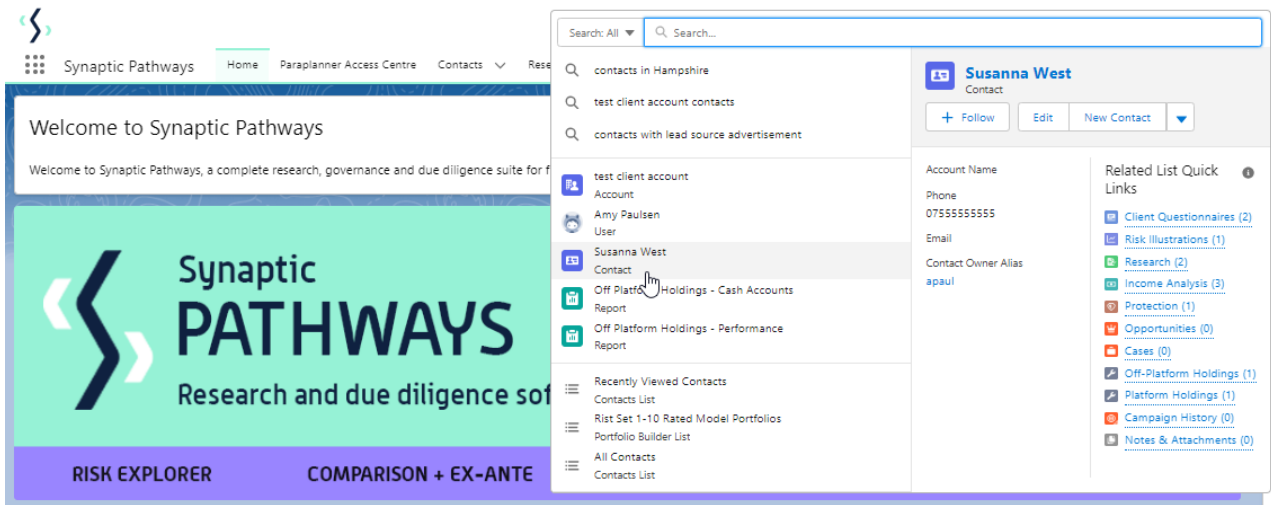
Comparison & Ex-Ante - Creating within a client record

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

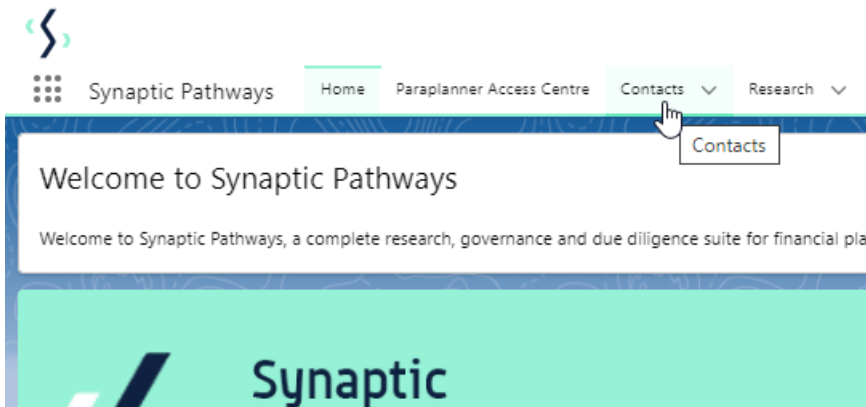
Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create a comparison with ex-ante scenario within a contact record, either:

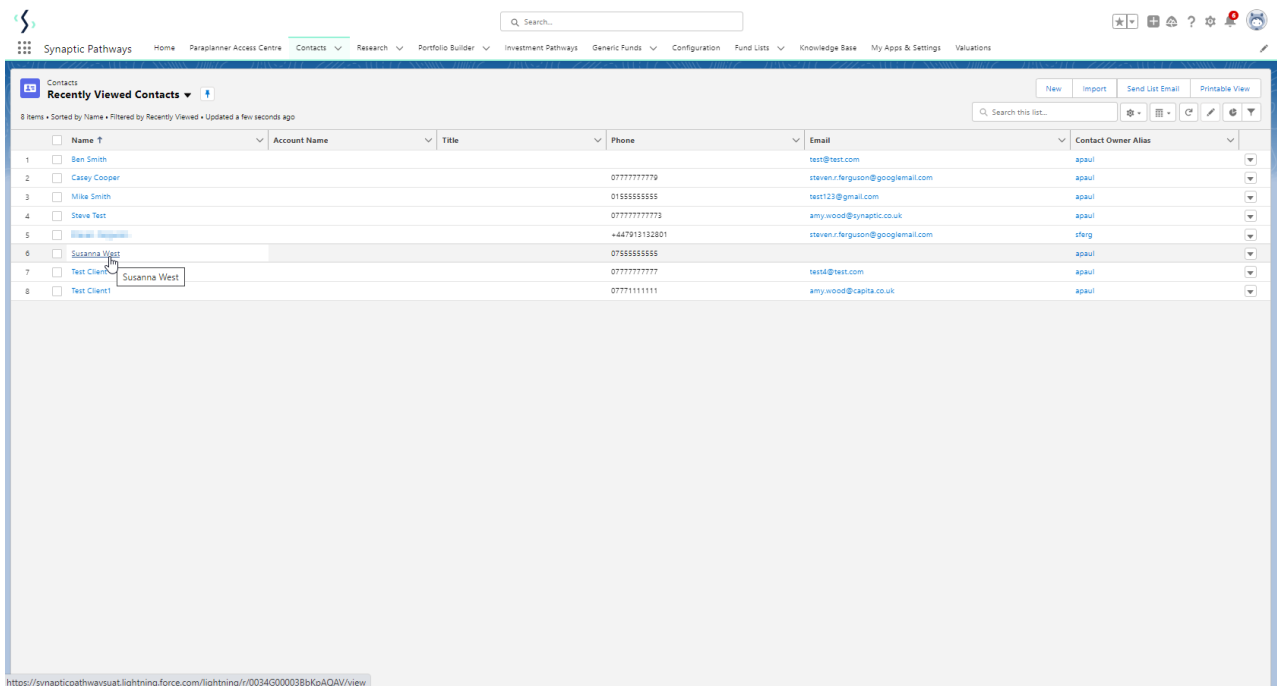
Search for the client in the top search bar:



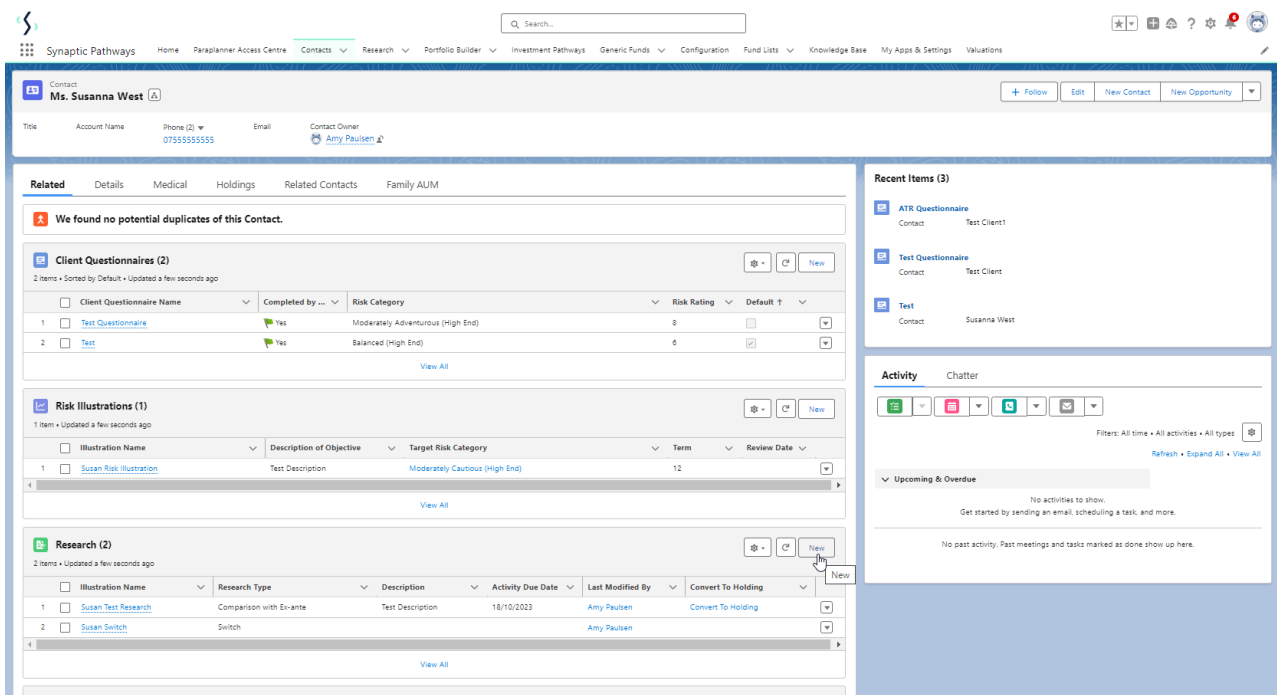
Alternatively, find the client within the **Contacts** tab:



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:

Phone X
Email

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.

Cancel Next

The client field will be populated automatically:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client
Susanna West X

* Illustration Name

* Term

Description

Activity Due Date

Cancel Save & New Save

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: Comparison with Ex-ante

* = Required Information

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

Synaptic Pathways
Home
Paraplanner Access Centre
Contacts
Research
Portfolio Builder
Investment Pathways
Generic Funds
Configuration
Fund Lists
Knowl...

Ms. Susanna West

Research "Susanna Comparison w/ Ex-ante" was created.

Title Account Name Phone (2) Email Contact Owner

0755555555 0755555555 Amy Paulsen

Related
Details
Medical
Holdings
Related Contacts
Family AUM

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 (3)

3 items • Updated 3 minutes ago

	Illustration Name	Activity Due Date	Last Modified By	Convert To Holding
1	Susan Test Research	18/10/2023	Amy Paulsen	Convert To Holding
2	Susan Switch		Amy Paulsen	
3	Susanna Comparison w/ Ex-ante	Text 16/12/2023	Amy Paulsen	

Susanna Comparison w/ Ex-ante

Client: Susanna West

Description: Test Description Text

Illustration Type: Whole of Market

Policy Type:

Segment Name:

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

Contacts > Client Test

Research

9 items • Updated a few seconds 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
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
