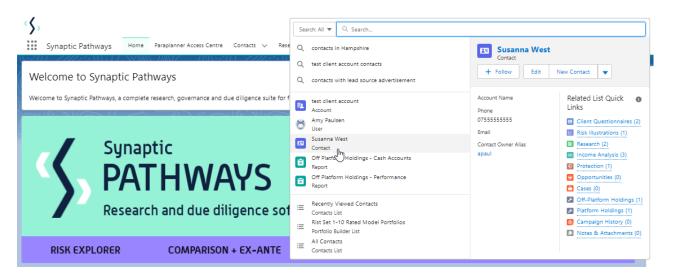
Comparison & Ex-Ante - Creating within a client record

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:

Synaptic Pathways Home Paraplanner Acc	cess Centre Contacts 🗸 Research 🗸 Portfolio B	Q. Search Builder V Investment Pathways Gener	ic Funds 🗸 Configuration Fund Lists	❤ Knowledge Base My Apps & Settings \	😿 🖬 💩 ? 🌣	e 🗟
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Name T	✓ Account Name ✓ Title	le v F	Phone	∨ Email	✓ Contact Owner Alias	~
1 Ben Smith				test@test.com	apaul	
2 Casey Cooper		c	07777777779	steven.r.ferguson@googlemail.com	apaul	
3 Mike Smith		c	01555555555	test123@gmail.com	apaul	
4 Steve Test		0	077777777773	amy.wood@synaptic.co.uk	apaul	
5 Section Sect			+447913132801	steven.r.ferguson@googlemail.com	sferg	
6 Susanna West			07555555555		apaul	
7 Test Client Susanna West			777777777777	test4@test.com	apaul	
8 Test Client1		0	07771111111	amy.wood@capita.co.uk	apaul	
https://synapticpathwaysuat.lightning.force.com/lightning/	r/0034C000038bKpAQAI//view					

Click **New** within the Research area:

CQ. Search Synaptic Pathways Home Persplanner Access Centre Contacts V Research V Portfolio Builder V Investment Pathways Generic Funds V Configuration Fund Lists V Knowledge Bi	👷 🖬 🕾 ? 🏟 🦧 🐯
Image: Susanna West Image: Susanna West	+ Follow Edit New Contact New Opportunity V
Related Details Medical Holdings Related Contacts Family AUM	Recent Items (3)
S We found no potential duplicates of this Contact.	Contact Test Client1
Client Questionnaires (2)	Contact Test Client
Client Questionnaire Name v Completed by v Risk Category v Risk Rating v Default † v	🗷 Test
1 Test Questionnaire Vis Moderstely Adventurous (High End) 8	Contact Susanna West
2 Test Ves Balanced (High End) 6 V V	
View All	Activity Chatter
Risk Illustrations (1) @ • • C Tome 1 new • Upgend • New second sign 0	Filters: All time + All activities + All types
Illustration Name v Description of Objective v Target Risk Category v Term v Review Date v	nitels. All defines - All accinices - All accinices - All accinices - All accinices - All a View All
1 Susan Rek Illustration Test Description Moderately Cautious (High End) 12 💌	✓ Upcoming & Overdue
< Vex Al	No activities to show. Get started by sending an email, scheduling a task, and more.
Research (2) (*) (*) (*) 2 trans - Updated a few seconds ago (*) (*) (*) (*)	No past activity. Past meetings and tasks marked as done show up here.
Illustration Name V Research Type V Description V Activity Due Date V Last Modified By V Convert To Holding V	
1 Susan Test Research Comparison with En-ante Test Description 18/10/2023 Amy Paulsen Convert To Holding 👻	
2 Susan Switch Switch Amy Paulsen	
K P	

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:

	Phore
	New Research
Select a record type	
۲	Comparison with Ex-ante Select this option to compare platforms and products BEFORE executing an Illustration as a single or multiple wrapper report
0	Ex-ante (Pre-Sales) Select this option to create an Ex-ante (pre-sales) illustration for a single product
e O	Switch Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.
Evolore Pathways	Cancel Next

The client field will be populated automatically:

New Research: Comparison with Ex-ante					
	* = Required Information				
Information					
*Client					
💶 Susanna West 🛛 🗙					
*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**:

*Client Susanna West X *Illustration Name Susanna Comparison w/ Ex-ante *Term 10 Description Test Description Text Activity Due Date 16/12/2023 Cancel Save & New Save Sa	N. D.		with Excenter	
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Ms. Susanna West			Research "Sus	anna Comparison w/ Ex-ante" wa

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				छि -	C ^e New	
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1 Susan Test Research	ante		18/10/2023 Amy Paulsen	Convert To Holding		
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	Illustration Type Segment Na	ime			•	
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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	V	
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	v	
6 Comparison with Ex-Ante.	Ex-ante	Test Description	30/04/2022	Amy Paulsen	▼	
7 Test Ex-Ante	Comparison with Ex-ante	Test		Amy Paulsen	v	
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		
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