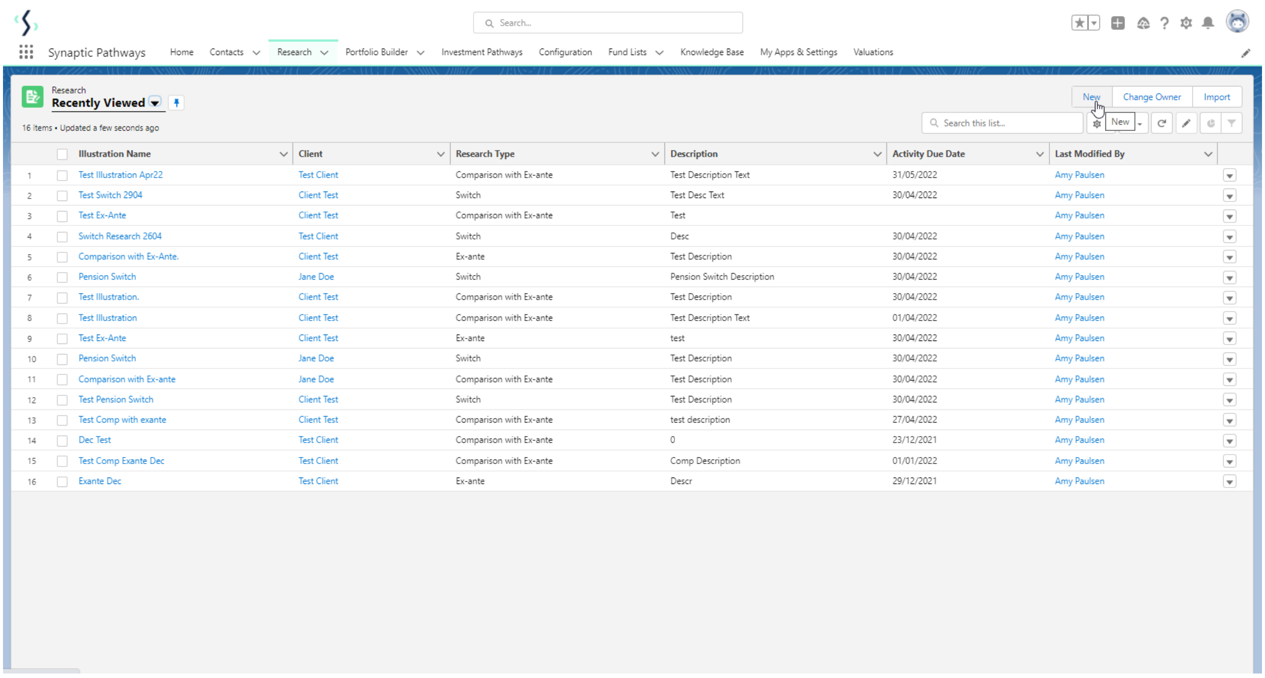
Ex-Ante - Creating in the Research tab

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.

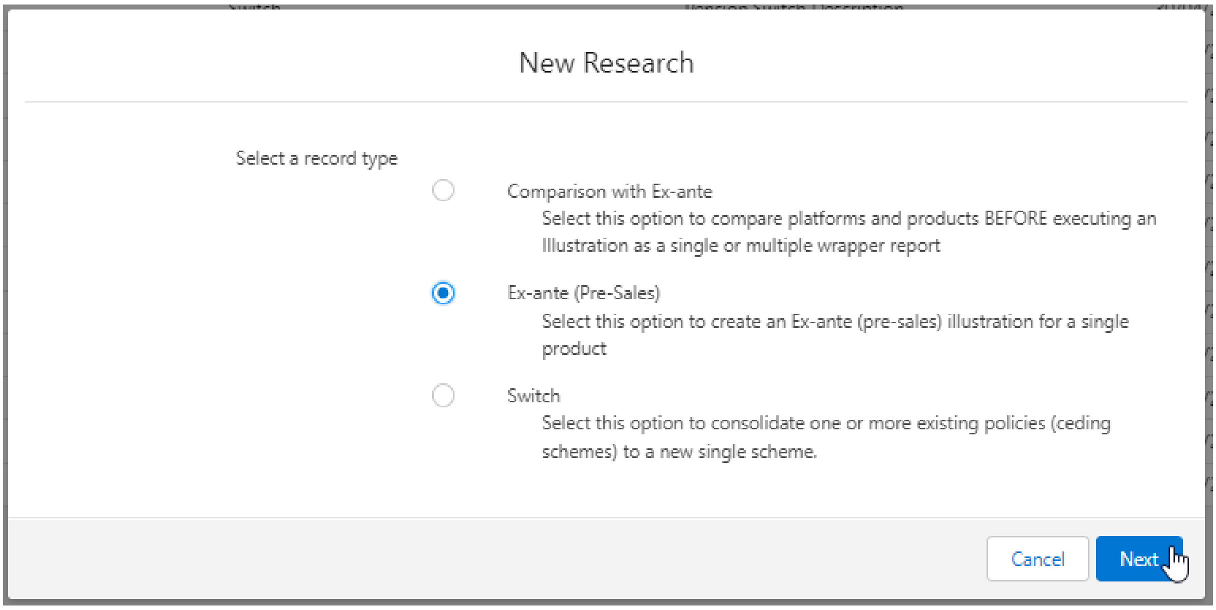
To create an Ex-ante scenario in the Research tab, click into the tab from the Homepage:

All existing research will be listed. Click **New** to create new research:

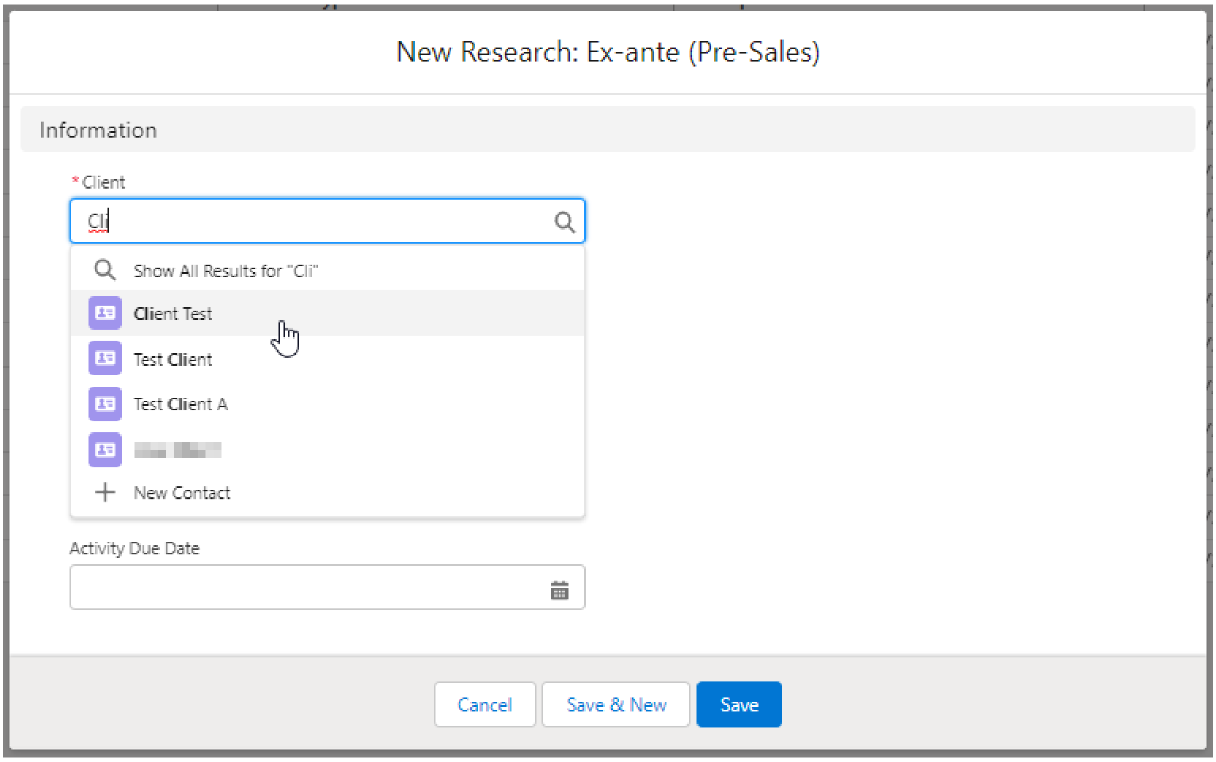


If you would like to run a comparison with an ex-ante report, select the first option. If you wish to create an ex-ante report without the comparison, select the second option:

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

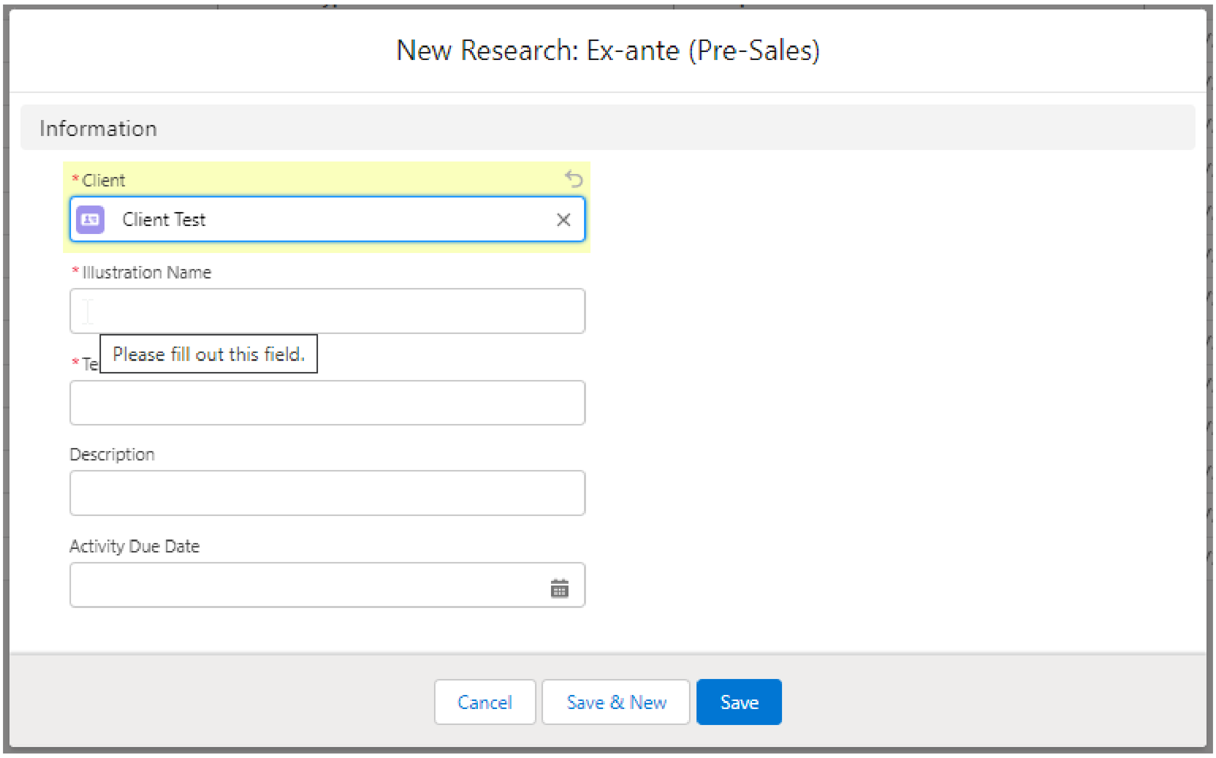


As we have created research within the Research tab, you will need to search for the client:

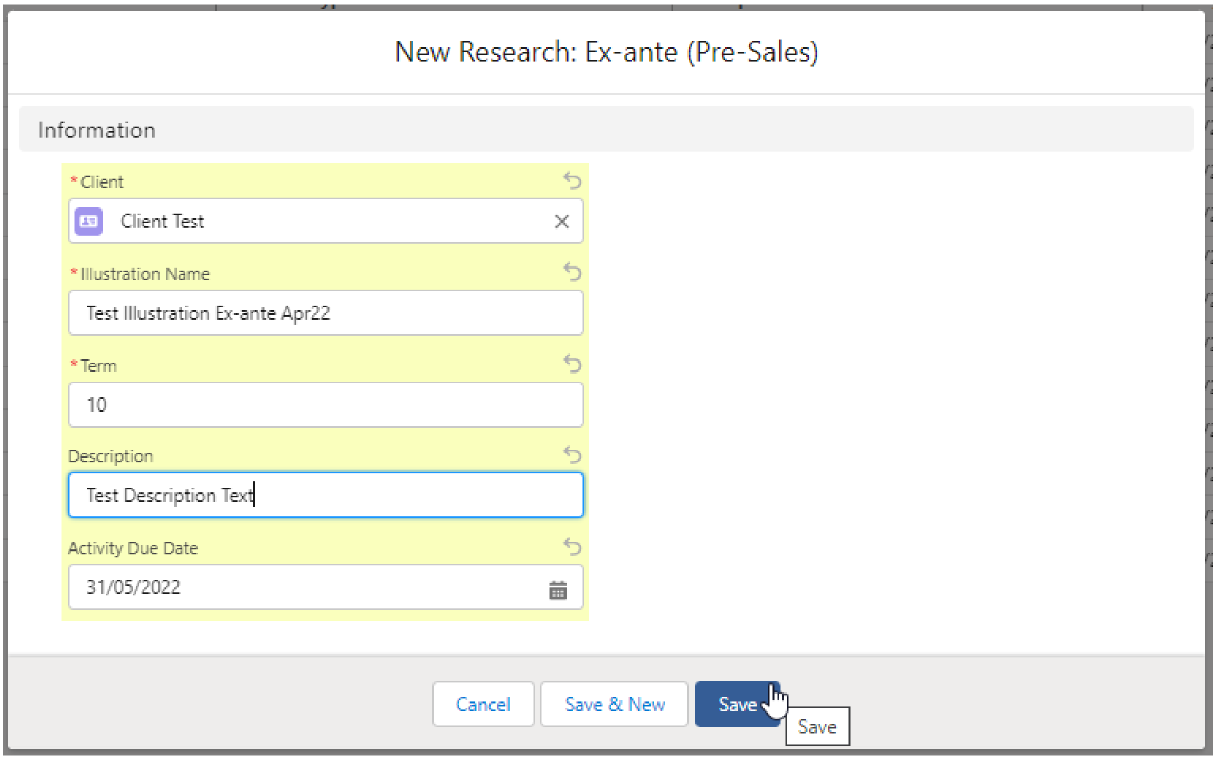


Note - Client field will already be completed if research is created in the contact record.

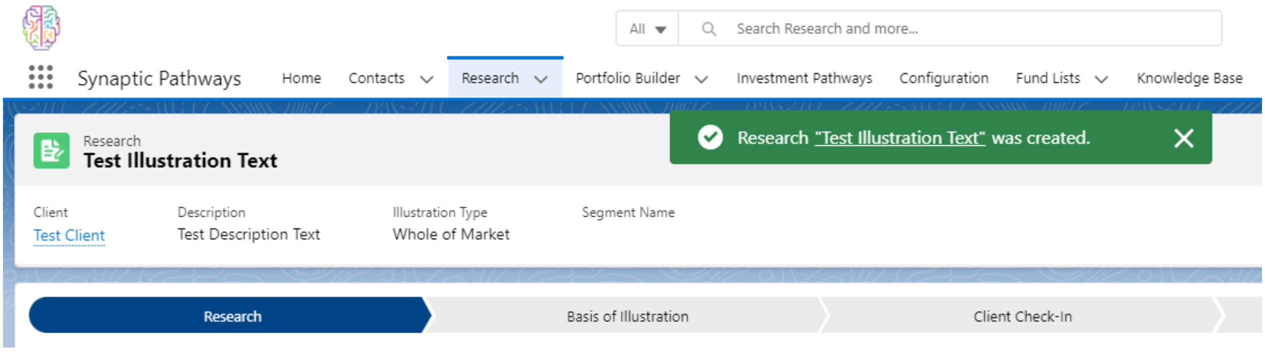
Complete the remaining fields:

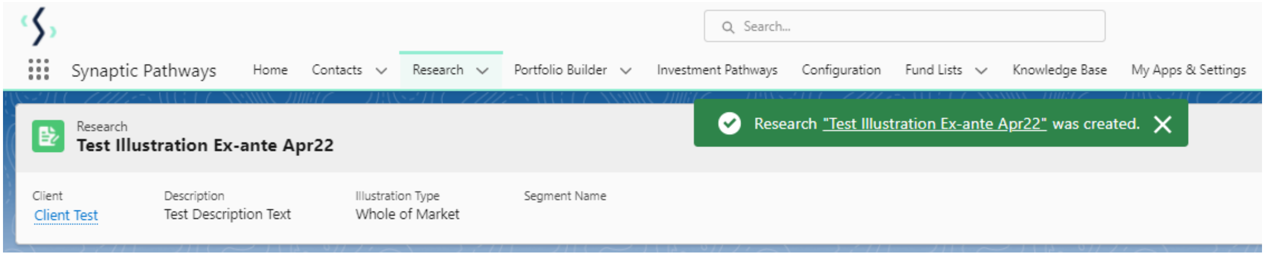


Save:



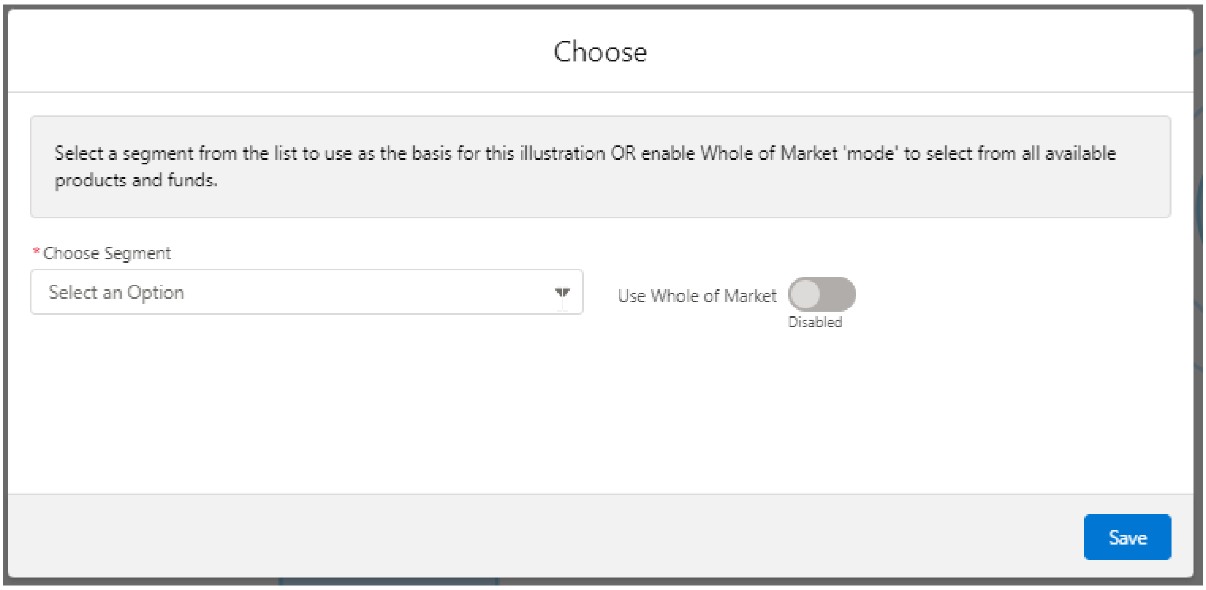
This will take you directly into the research:

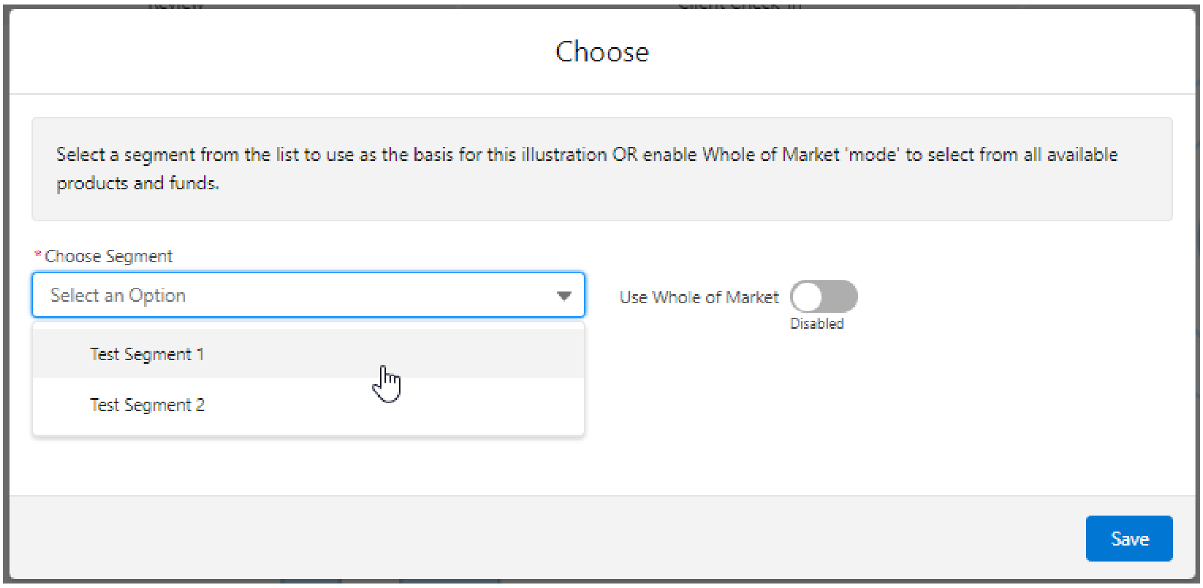




If using a Central Investment Proposition, we will need to choose whether to use a segment or conduct Whole of Market research:

Please note - If the whole of market button cannot be enabled, you do not have the permissions to overwrite the segment/s assigned to you in the CIP. Your Administrator can assign this for you. Article **Pathways Administrator - Assigning Whole of Market permissions** explains how this is applied to your account.





Once the segment is selected, **Save.**