## Ex-Ante - Creating research 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 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:

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	Name 1		✓ Account Name	~	Title	~	Phone		~	Email	✓ Contac	t Owner Alias	~	
1	Chris Smith						07777777771			test@test.com	apaul			]
2	Client Test	_									apaul		V	)
3	Jane Doe Client Te	st					07777777777			janetest@test.com	apaul			)
4	Steve lest						0/1////////////////////////////////////			test1@test.com	apaul			

## Click **New** within the Research area:

Synantic Pathways Home Contact	Research y Portfolio Builder y	Q Search	Configuration Fund Lists 🗸	Knowledge Base	My Apps & Settings	★マ 目 命 ? 卒 阜 👸
Contact Ms. Client Test	Final Contact Durser	SSE HINKET – HANS-				+ Follow Edit New Contact New Opportunity V
Related Details Holdings	Brail Contact Owner Amy Paulsen £	1 ( č. 11/2/201		) ( & c */////		Recent Items (2)
X We found no potential duplicates of	this Contact.					Contact Jane Doe
Attitude To Risk Questionnaires (0)				New Ch	ange Owner	Risk Questionnaire Contact Jane Doe
Risk Illustrations (0)				New Ch	ange Owner	Activity Chatter
Research (5+) 5+ items • Updated a few seconds ago			\$ •	C <sup>e</sup> New Ch	ange Owner	New Task New Event Log a Call Email
Illustration Name V	Research Type V	Description	✓ Activity Due Date ∨	Last Modified By	~	Create a task Add
1 Test Illustration	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen	v	
2 Test Comp with exante	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen	•	Filters: All time • All activities • All types
3 Test Pension Switch	Switch	Test Description	30/04/2022	Amy Paulsen	•	Refresh • Expand All • View All
4 Test Ex-Ante	Ex-ante	test	30/04/2022	Amy Paulsen	•	✓ Upcoming & Overdue
5 Test Illustration.	Comparison with Ex-ante	Test Description	30/04/2022	Amy Paulsen	•	No next steps.
Opportunities (0)	Vie	7 All			> New	To get things moving, add a task or set up a meeting. No past activity: Past meetings and tasks marked as done show up here.
Cases (0)				New Cha	ange Owner	

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:

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	New Research
Select a record type	Comparison with Ex anto
	Select this option to compare platforms and products BEFORE executing an Illustration as a single or multiple wrapper report
۲	Ex-ante (Pre-Sales) Select this option to create an Ex-ante (pre-sales) illustration for a single product
0	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:

nail Contact Owner		×
New Rese	earch: Ex-ante (Pre-Sales)	ļ
Information		D
* Client Test Client * Illustration Name * Term	<ul> <li>✓</li> <li>✓</li></ul>	
Description Activity Due Date		
Cancel	Save & New Save	iv

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)	
formation			
* Client			
📧 Client Test	×		
X III untration Name	5		
Test Illustration Apr 22 Ex ante			
lest illustration Apr 22 Ex-ante			
* Term	5		
10			
Description	5		
Test Description Text			
Activity Due Date	5		
31/05/2022			
Synaptic Pathways Home Com	Cancel     Save & New     Save       cts     ×     Research     ×     Portfolio Builder     ×     Investment F	Search Pathways Configuration Fund Lists V Knowledge Base	My Apps 8
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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 Ow	ner
		Illustration Name	$\sim$	Research Type	$\sim$	Description	$\sim$	Activity Due Date $$	Last Modified By $\sim$	
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	•
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Synaptic Pathways Home Contacts > Research > Portfolio Builder > Investment Pathways Configuration Fund Lists > Knowledge Base My Apps & Settings Valuations

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Contacts > Client Test Research										
9 Items - Updated a few seconds ago										_
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1 [		Test Illustration	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen			W	
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This will take you directly into the research