

# Ex-Ante - Creating through the homepage

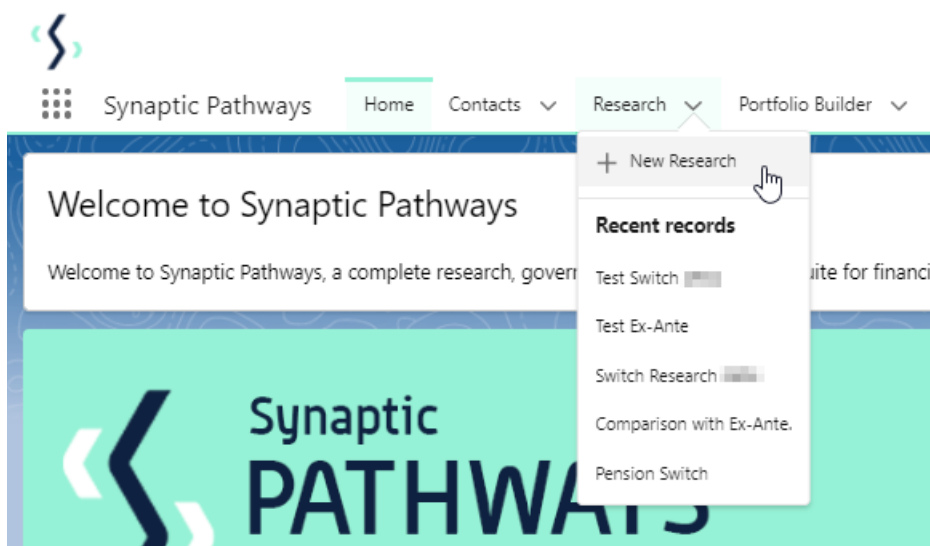
Last Modified on 13/02/2024 3:34 pm GMT

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

To create an 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.

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

### 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.

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

### New Research: Ex-ante (Pre-Sales)

Information

\*Client

- Show All Results for "Cli"
- Client Test
- Test Client
- Test Client A
- [Redacted]
- New Contact

Activity Due Date

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

Complete the remaining fields:

### New Research: Ex-ante (Pre-Sales)

Information

\* Client ↶  
 ✕

\* Illustration Name

\* Term ↶

Description

Activity Due Date  
 📅

**Save:**

### New Research: Ex-ante (Pre-Sales)

Information

\* Client ↶  
 ✕

\* Illustration Name ↶

\* Term ↶

Description ↶

Activity Due Date ↶  
 📅

Save

This will take you directly into the research:

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

Search...

Research **Test Illustration Ex-ante Apr22** Research "Test Illustration Ex-ante Apr22" was created.

Client	Description	Illustration Type	Segment Name
Client Test	Test Description Text	Whole of Market	

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.

### 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

Save

### 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

- Test Segment 1
- Test Segment 2

Save

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