

Comparison & Ex-Ante using a CIP - Creating research within a client record

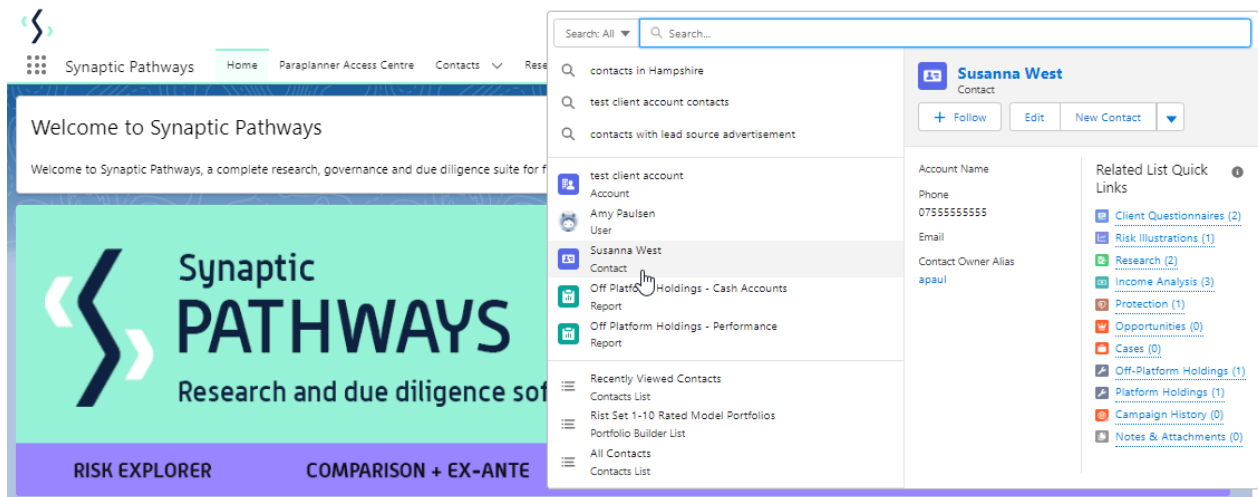
Last Modified on 13/02/2024 3:34 pm GMT

This article explains how to create Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup the CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles [here](#).

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:

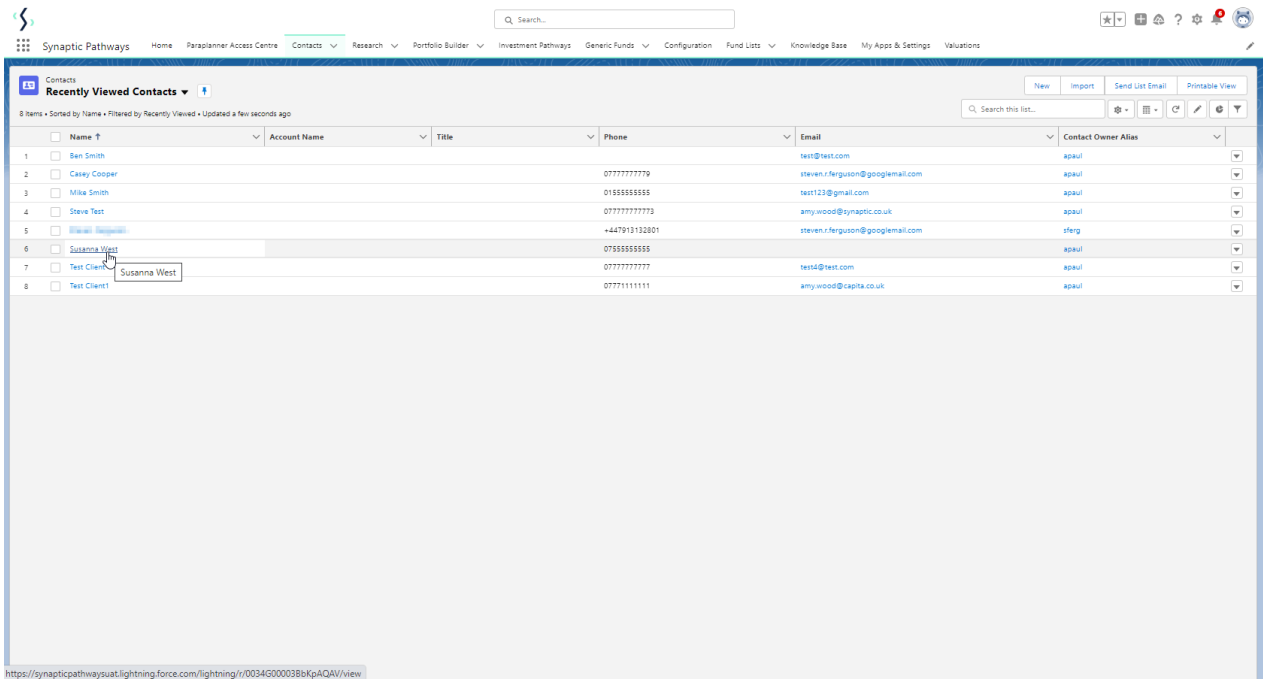
Search for the client in the top search bar:



Alternatively, find the client within the Contacts tab:

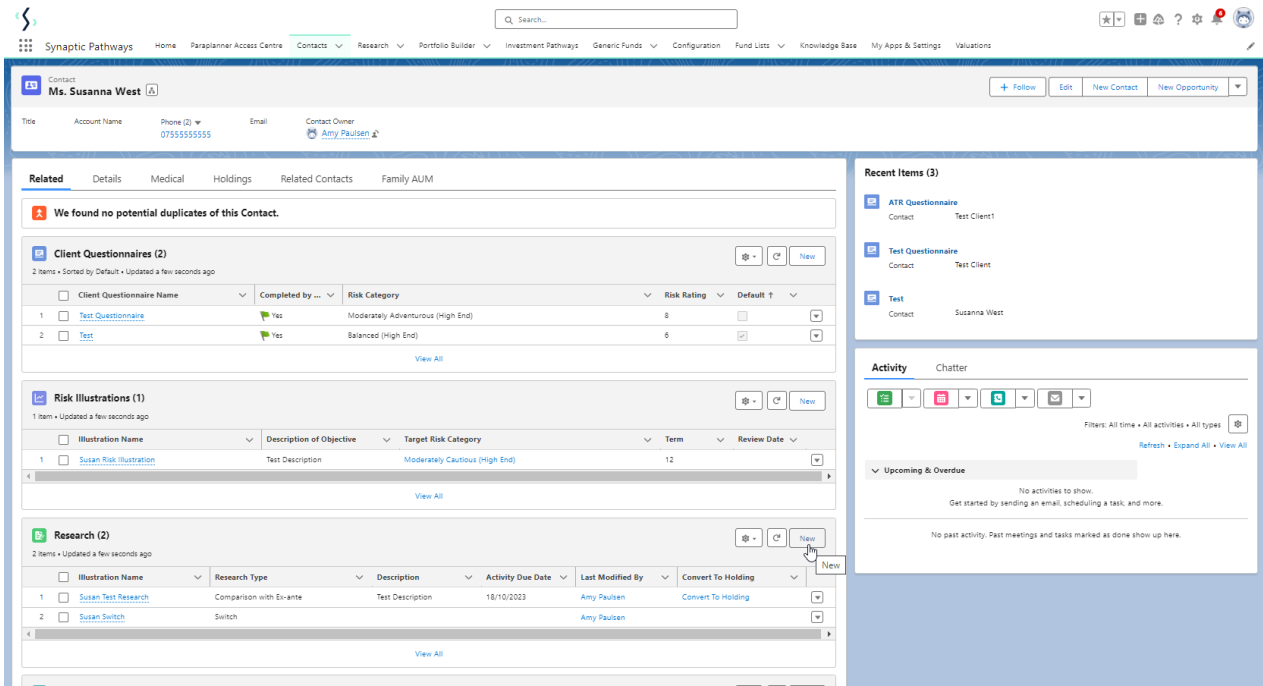


Select the client from the contact list:



https://synapticpathwaysuat.lightning.force.com/lightning/r/0034G00003B6kQAQ/view

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:

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.

The client field will automatically be completed

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

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

Search...

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

Contact
Ms. Susanna West

Title	Account Name	Phone (2)	Email	Contact Owner
		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:

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

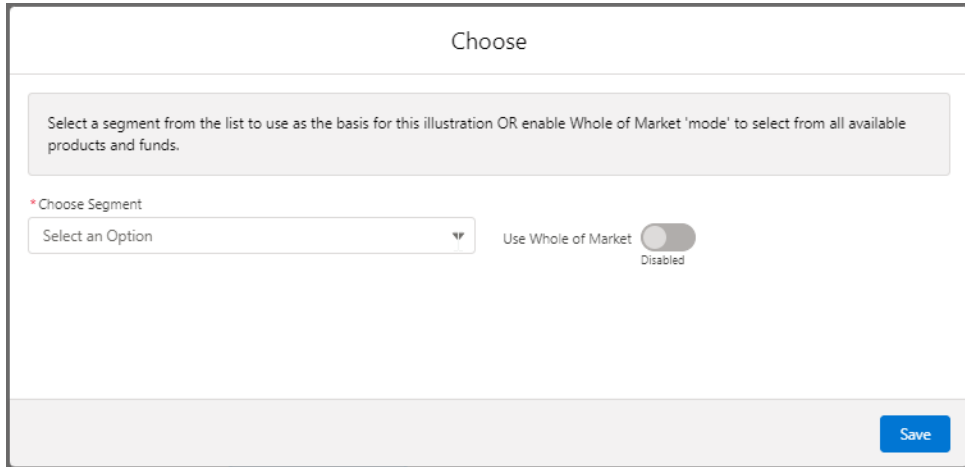
Search...

Contacts > Client Test
Research 9 items • Updated a few seconds ago

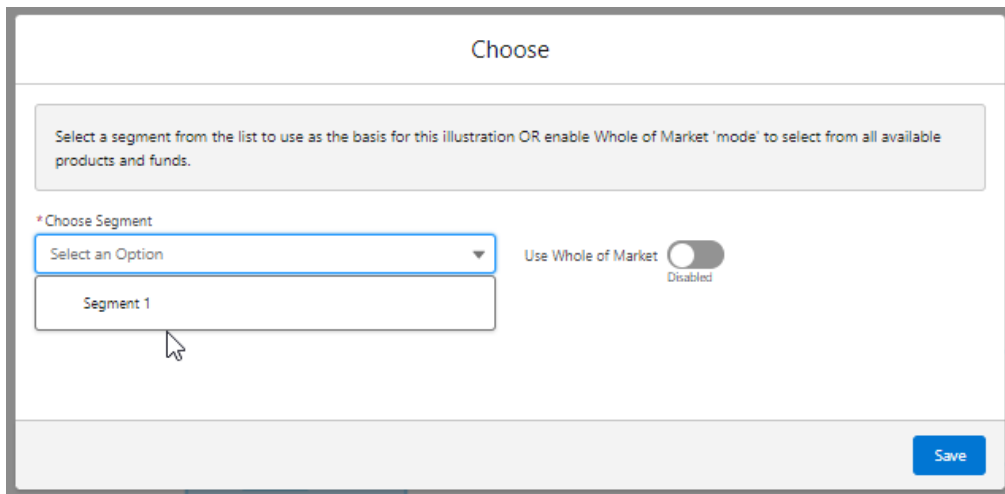
Illustration Name	Research Type	Description	Activity Due Date	Last Modified By
1 Test Illustration	Comparison with Ex-ante	Test Description Text	01/04/2022	Amy Paulsen
2 Test Comp with exante	Comparison with Ex-ante	test description	27/04/2022	Amy Paulsen
3 Test Pension Switch	Switch	Test Description	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		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

As we have configured a Central Investment Strategy, we will need to choose whether we 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.



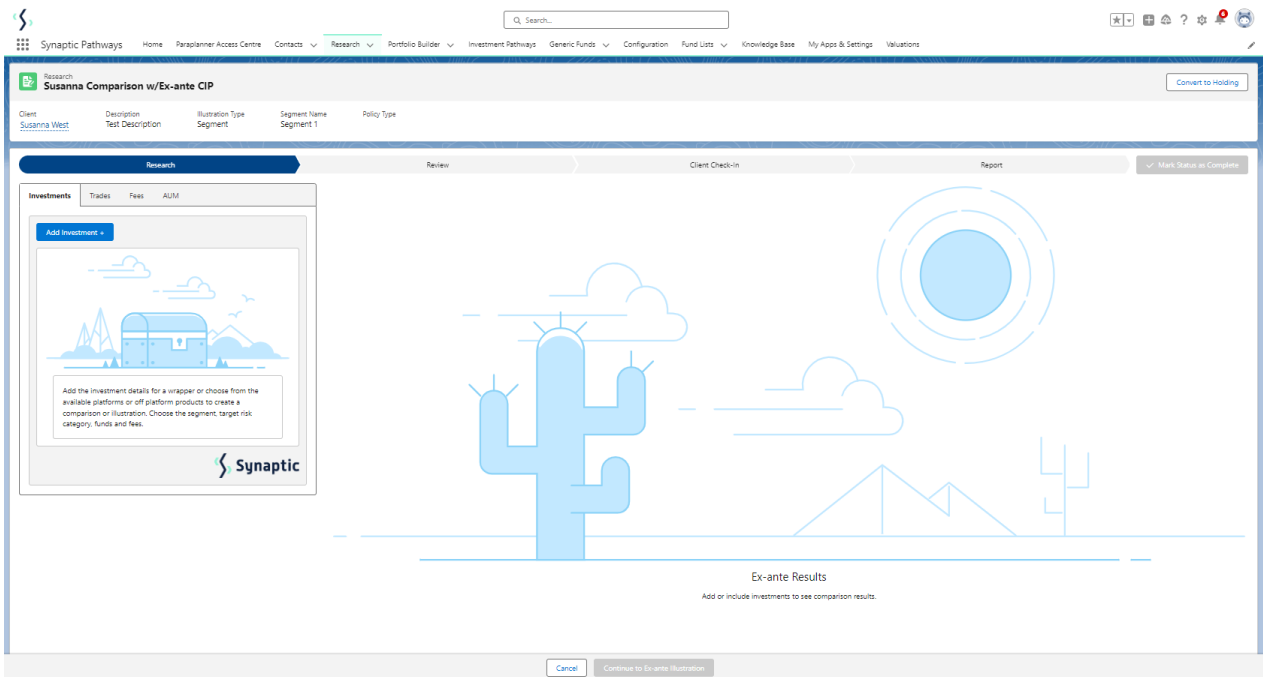
The screenshot shows a form titled "Choose". At the top, there is a grey box with the text: "Select a segment from the list to use as the basis for this illustration OR enable Whole of Market 'mode' to select from all available products and funds." Below this, there is a label "* Choose Segment" followed by a dropdown menu with the text "Select an Option" and a downward arrow. To the right of the dropdown is a toggle switch labeled "Use Whole of Market" which is currently "Disabled". At the bottom right of the form is a blue "Save" button.



This screenshot shows the same "Choose" form, but the dropdown menu is now open, displaying "Segment 1" as the selected option. A mouse cursor is pointing at the "Segment 1" option. The "Use Whole of Market" toggle remains disabled. The "Save" button is still present at the bottom right.

Once the segment is selected, **Save**

This will take you directly into the research:



The segment will be displayed at the top of the screen:

