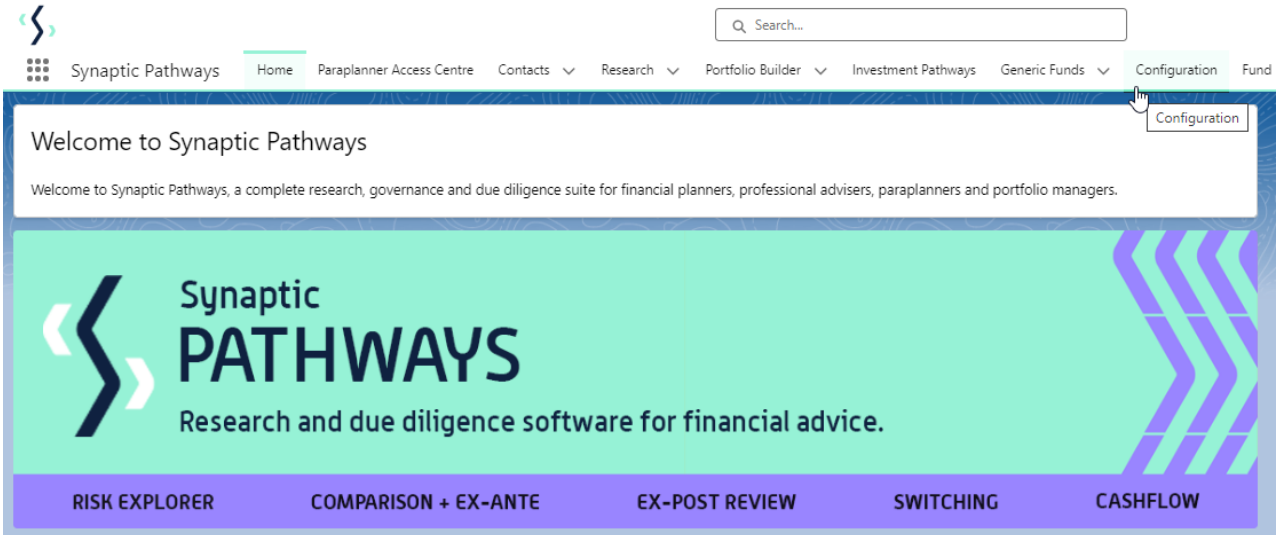


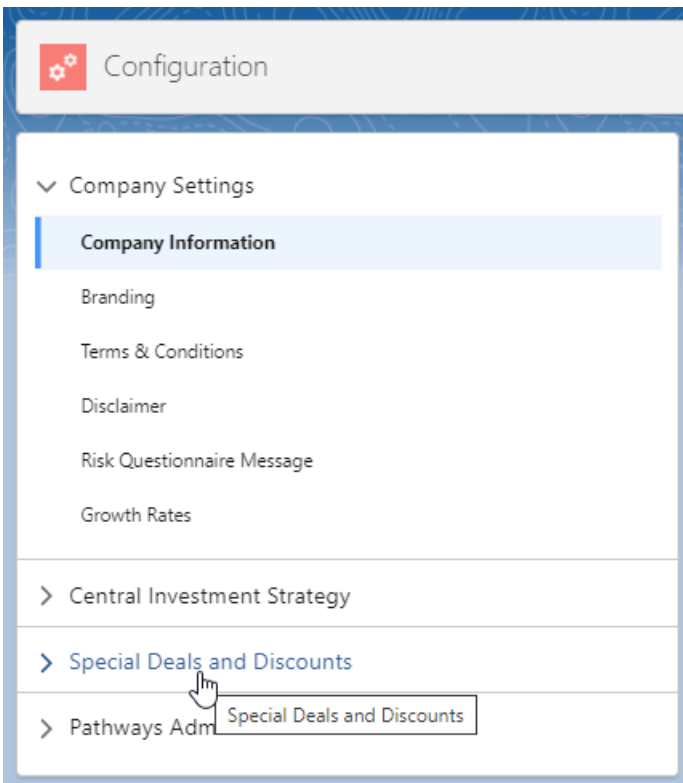
Creating Special Deals

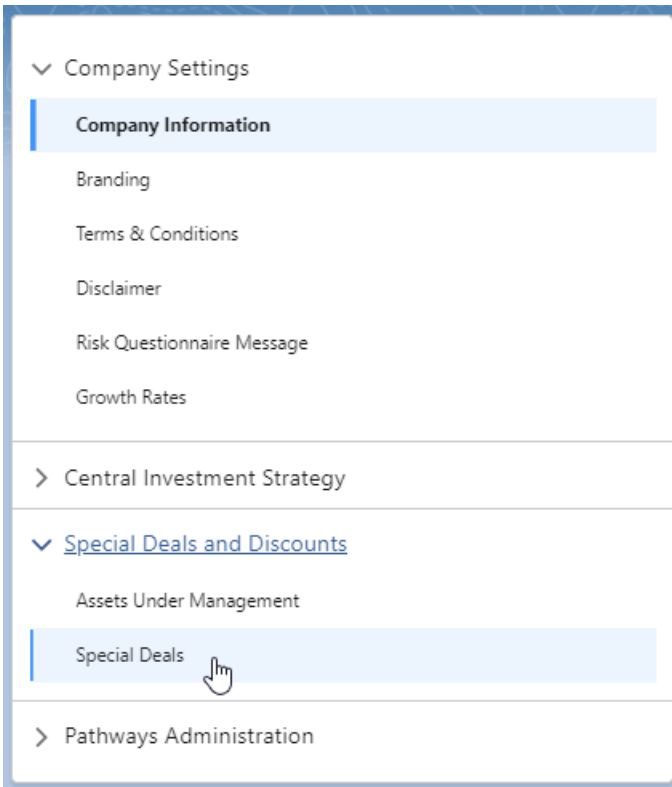
Last Modified on 13/02/2024 3:35 pm GMT

To create a special deal in Synaptic Pathways, navigate to **Configuration** in the navigation bar:

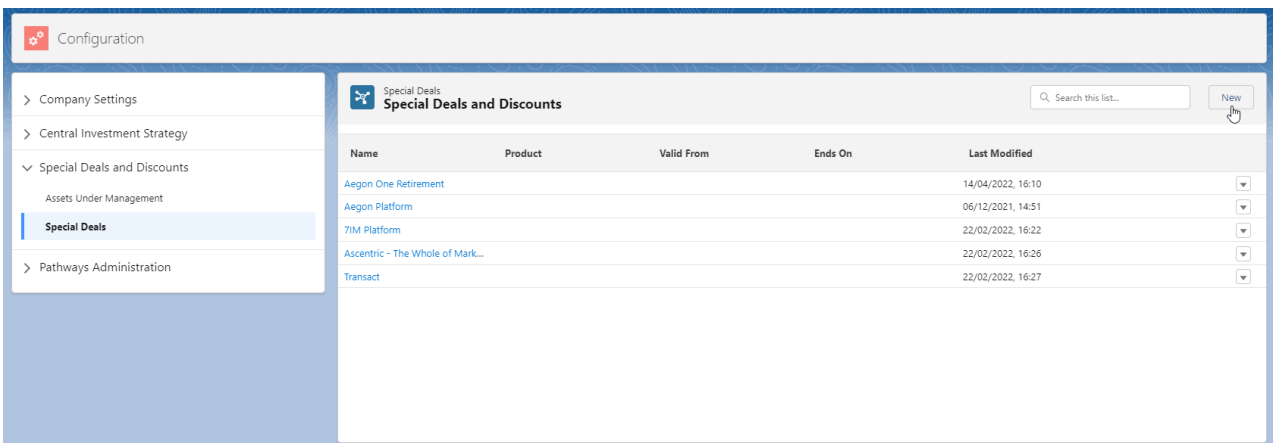


Click into **Special Deals and Discounts**, then **Special Deals**:





To create a special deal, click **New**:



Select whether you would like to create a platform or off platform special deal.

In this example, we will click **Platforms**:

✕

Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

* Name
Enter Name of Special Deal...

Description
Enter Description

Select the Platform from the drop down:

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

- 7IM Platform
- abrdrn Wrap
- Advance by Embark Platform
- Aegon Platform**
- AEGON Retirement Choices
- AJ Bell Investcentre

Once selected, you are able to remove the platform if selected in error. If you are happy to proceed, you can either keep the default name of the deal or change it:

✕


Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

 **Aegon Platform** ✕

* Name
Aegon Platform

Description
Enter Description

Once complete, **Save:**

Add New Special Deal

To create a special deal, first choose the platform or off platform product and then provide a name for the special deal. Once created you can then select the deal and enter your deal details.

Select Search Type

Platforms Off Platform Products

Q Search

Aegon Platform

* Name

Aegon Platform TEST

Description

Test Description Text Here

Cancel Save & New Save

The deal has been successfully created:

Configuration

Success! Special Deal [Aegon Platform TEST] was created successfully!

Special Deals and Discounts

Name	Product	Valid From	Ends On	Last Modified
7IM Platform				19/10/2021, 17:53
Aegon Platform TEST				04/11/2021, 15:24

To add the details of the deal, click into the record:

Special Deals and Discounts

Name	Product	Valid From	Ends On	Last Modified
7IM Platform				19/10/2021, 17:53
Aegon Platform TEST				04/11/2021, 15:24

The deal will be **Active** by default. You can set **Not Active** if you would rather edit & activate it at a later date. Enter the **Deal Start Date** (leave blank if starting from today) & **Deal End Date** (leave blank if there is no expiry date):

Name: Aegon Platform
Provider: Aegon Platform
Portfolio: -
Deal Start Date (leave blank to apply from today):
Last Modified Date: Thu, 09 Nov 23
Platform: All Platform Products
Special Deal Type: -
Deal End Date (leave blank for no expiry date):
Last Modified By: -

Special Deal Charge Type | **Special Deal Charge Details** | **About Special Deal**

Platform Charges

Platform Charges

Charge Tier Name: Platform AMC

View Provider Charges | View Network Charges

Revert to Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£100,000.00	0.29		All
£100,000.00	£250,000.00	0.26		All
£250,000.00	£500,000.00	0.23		All
£500,000.00	£1,000,000.00	0.15		All
£1,000,000.00		0.00		All

Self Invested Personal Pension

AJ Bell Investcentre SIPP

Charge Tier Name: SIPP AMC

Edit | Add Row

Charges will be broken down by Platform AMC and charges per product.

To add details of a special deal, click **Edit**

Special Deal Charge Type | **Special Deal Charge Details**

Platform Charges

Platform Charges

Charge Tier Name: Platform AMC

View Provider Charges | View Network Charges

Revert to Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£100,000.00	0.29	All
2	£100,000.00	£250,000.00	0.26	All
3	£250,000.00	£500,000.00	0.23	All
4	£500,000.00	£1,000,000.00	0.15	All
5	£1,000,000.00		0.00	All

Amend the tiers by clicking on the pen icon next to the value you would like to update:

Platform Charges

Platform Charges

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[Revert to Provider Charges](#)

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£100,0...	0.29		All		
2	£100,0...	£250,0...	0.26		All		
3	£250,0...	£500,0...	0.23		All		
4	£500,0...	£1,000,...	0.15		All		
5	£1,000,...		0.00		All		

As you amend the tiers, you will need to make sure the remaining tiers start and end at the correct value:

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£120,0...	0.29		All		
2	£100,0...	£250,0...	0.26		All		
3	£250,0...	£500,0...	0.23		All		
4	£500,0...	£1,000,...	0.15		All		
5	£1,000,...		0.00		All		

[Cancel](#) [Save](#)

As seen below:

	Tier St...	Tier End	Rate %
1	£0.00	£120,0...	0.29
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

Edit charge values by clicking the pen and update:











	Tier St... ▾	Tier End ▾	Rate % ▾
1	£0.00	£120,0...	0.29
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

	Tier St... ▾	Tier End ▾	Rate % ▾
	<input type="text" value="0.29"/>		
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

	Tier St... ▾	Tier End ▾	Rate % ▾
1	£0.00	£120,0...	0.28
2	£120,0...	£250,0...	0.26
3	£250,0...	£500,0...	0.23

Note: Updated fields will be highlighted in yellow

Additional rows can be added through the **Add Row** button:

	Tier St... ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Curren... ▾	Select Fun...	Remove
1	£0.00	£120,0...	0.28		All		
2	£120,0...	£250,0...	0.26		All		
3	£250,0...	£500,0...	0.23		All		
4	£500,0...	£1,000,...	0.15		All		
5	£1,000,...		0.00		All		

Complete the details by clicking into each field:

	Tier St... ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Curren... ▾	Select Fun...	Remove
1	£0.00	£120,0...	0.28		All		
2					All		
3	£120,0...	£250,0...	0.26		All		
4	£250,0...	£500,0...	0.23		All		
5	£500,0...	£1,000,...	0.15		All		
6	£1,000,...		0.00		All		

	Tier St... ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Curren... ▾	Select Fun...	Remove
1	£0.00	£100,0...	0.29		All		
2					All		
3	£100,0...	£250,0...	0.26		All		
4	£250,0...	£500,0...	0.23		All		
5	£500,0...	£1,000,...	0.15		All		
6	£1,000,...		0.00		All		

Once updated, the Special Deal Charge Details will be highlighted in green:

Platform Charges

▼ Platform Charges

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[Revert to Provider Charges](#)

	Tier Start ▾	Tier End ▾	Rate % ▾	Rate £ ▾	Fund Type ▾
1	£0.00	£120,000.00	0.28		All
2	£120,000.00	£250,000.00	0.26		All
3	£250,000.00	£500,000.00	0.23		All
4	£500,000.00	£1,000,000.00	0.15		All
5	£1,000,000.00				All

If you would like to view the original provider charges, click **View Provider Charges**

Charge Tier Name

Platform AMC

View Provider Charges

View Network Charges

Revert to Provider Charges

Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£100,000.00	0.29		All
£100,000.00	£250,000.00	0.26		All
£250,000.00	£500,000.00	0.23		All
£500,000.00	£1,000,000.00	0.15		All
£1,000,000.00		0.00		All

If you would like to revert the charges, click **Revert to Provider Charges**

Platform Charges

Platform Charges

Charge Tier Name
Platform AMC

View Provider Charges

View Network Charges

Revert to Provider Charges

Edit Add Row

	Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£120,000.00	0.28		All
2	£120,000.00	£250,000.00	0.26		All
3	£250,000.00	£500,000.00	0.23		All
4	£500,000.00	£1,000,000.00	0.15		All
5	£1,000,000.00				All

Revert to Provider Charges

This will delete current Special Deal for this Charge Tier.

Would you like to continue?

No Yes

Platform Charges

Platform Charges

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[Revert to Provider Charges](#)

[Edit](#) [Add Row](#)

Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£100,000.00	0.29	All
2	£100,000.00	£250,000.00	0.26	All
3	£250,000.00	£500,000.00	0.23	All
4	£500,000.00	£1,000,000.00	0.15	All
5	£1,000,000.00		0.00	All

When you have made the changes needed, are saved automatically. Click the cross next to the deal name in the navigation bar:

The screenshot shows the Synaptic Pathways interface. At the top, there is a search bar and a navigation menu with items like 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Aegon Platform'. The 'Aegon Platform' menu item is highlighted, and a cross icon is visible next to it. Below the navigation bar, the main content area is divided into several sections. The top section is for 'Aegon Platform' and includes fields for 'Name', 'Provider', 'Portfolio', 'Deal Start Date', 'Last Modified Date', 'Platform', 'Special Deal Type', and 'Deal End Date'. Below this, there are tabs for 'Special Deal Charge Type', 'Special Deal Charge Details', and 'About Special Deal'. The 'Special Deal Charge Details' tab is active, showing the 'Platform Charges' section. This section is identical to the one shown in the first image, with a table of charges and buttons for 'Edit' and 'Add Row'. To the right of the 'Platform Charges' section, there is a 'About Special Deal' box with instructions on how to edit the provider published charge tiers, change existing tiers, and use the 'Revert' action. Below the 'Platform Charges' section, there is a 'Self Invested Personal Pension' section, which is currently collapsed. The 'AJ Bell Investcentre SIPP' section is visible below it, showing a 'Charge Tier Name' of 'SIPP AMC' and buttons for 'View Provider Charges', 'View Network Charges', 'Edit', and 'Add Row'.

If you would like to view the special deal again, navigate back into **Configuration > Special Deals and Discounts > Special Deals**