

Ex-Post Reviews - Mark as Complete

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This article is a continuation of [Ex-Post Reviews - Report](#)

Once the report has been reviewed, **Mark as Complete** at the top right of the screen:

The screenshot shows the Synaptic Pathways user interface for an Ex-Post Review. At the top, there is a navigation menu with options like Home, Paraplanner Access Centre, and Research. The main header displays 'Ex-Post Review Test Review 2' and includes buttons for 'New Contact', 'Edit', and 'New Opportunity'. Below the header, client and holding information is shown: Client 'Susanna West', Holding 'Personal Pension | Fully Insured', Start Date '07/11/2019', and End Date '06/11/2033'. A progress bar at the bottom of the header shows the 'Report' step as completed, with the 'Mark Status as Complete' button highlighted. The main content area contains a 'Report' section with instructions, a 'Download Report' button, and a 'Test Review 2 - NOT FINAL' summary. The summary includes details for 'Prepared By' (Amy Paulsen), 'Prepared For' (Susanna West), 'Address', 'Date of Birth' (17th September 1982), 'FCA Registration Number' (623456), and 'Telephone' (01489 882980). A 'SUMMARY' section indicates the review is 'As of 30th November 2023'. A sidebar on the left provides a 'Report' overview and a 'GENERIC' product overview for 'Personal Pension (Fully Insured)' with a R.I.Y. of 0.31% and a Final Value of £296,791.03.

Update Holding Now

The screenshot shows a dialog box titled 'Ex-Post Completion'. The text inside reads: 'This ex-post review will be marked as complete and the linked holding will get updated with the proposal changes. Do you wish to continue?'. At the bottom of the dialog, there are two buttons: 'Update Holding Now' and 'Cancel'. A mouse cursor is pointing at the 'Update Holding Now' button.

The screenshot shows a progress bar for the 'Update Holding Now' process. The progress bar is labeled 'Step 2' and is 25% complete. The progress bar is a blue line on a grey background. To the right of the progress bar, it says '25% Complete'. Above the progress bar, there is a list of steps with corresponding icons: a green checkmark for 'Finalising holding review...', a blue circle for 'Updating holding record...', a grey circle for 'Updating valuation history for holding...', and a grey circle for 'Almost there - polishing up the final details for you...'. The 'Updating holding record...' step is currently active.

The **Mark as Complete** button will be greyed out once done.

✓ Mark Status as Complete
