



# Pathways

5.0 Release notes



## 1 In this release

This release includes enhancements to the holdings and research journeys.

The [Knowledgebase](#) contains FAQs and guides to walk you through the Pathways functionality in detail.

If you require support assistance, please contact [support@synaptic.co.uk](mailto:support@synaptic.co.uk) or call 0808 164 5463.

### **Synaptic Pathways Licensed Features**

- Pathways Introductory Pack
- Pathways Risk Explorer
- Pathways Comparison and Ex-ante
- Pathways Ex-post
- Pathways Valuations
- Pathways Switching

To arrange a demo of the new or existing functionality please contact [hello@synaptic.co.uk](mailto:hello@synaptic.co.uk), call 0800 783 4477 or [Book a Demo](#) direct from our website.

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## 2 Enhancements to core features

These features are available immediately as part of your core Pathways licence.

### 2.1 Holdings

#### **Generic fund**

Funds can be recorded for providers and products that do not appear on the Synaptic database, such as historic funds that are no longer on sale. This allows you to record the core fund information and asset allocation for use within the research journeys.

#### **Fund validation**

When adding underlying assets to a holding on the Synaptic database, the funds available on the provider platform or product will be displayed to select from.

### 2.2 Portfolio Builder

#### **Fund lists**

Funds lists will display who created the list, the owner and who last modified the list.

#### **Parent fund search**

When searching for funds to add to a portfolio, you can limit the search to Parent funds only.

#### **In-House Discretionary Portfolios**

Special deals can be recorded against Platforms and products for the In-House Discretionary Portfolios. Details are recorded under the configuration area and applied during the research journeys to display in the results.

## 3 Enhancements to licensed features

These features require the relevant licence. To arrange a demo, click on the 'Request Access' button on the feature within Synaptic Pathways, speak to one of the team on 0800 783 4477 or email your request to [hello@synaptic.co.uk](mailto:hello@synaptic.co.uk).

### 3.1 Pathways Risk Explorer

#### **Capacity for loss**

Responses to the Capacity for Loss questionnaire will be retained during the customer research journey you are in.

### 3.2 Pathways Switching

#### **Select ceding scheme from holdings**

Ceding schemes can be added manually or selected from the clients existing holdings. Values can be entered in pounds and pence.

#### **Target term on ceding scheme**

During the switching journey, you can reflect the target term on a ceding scheme to do 'like for like' comparison.

#### **Comparison Results**

Result details will display the growth, value, fees and RIY against each wrapper.

### 3.3 Research journeys

#### **Apply Fees to Regular Contributions**

Initial, regular and one-off fees can be added to regular contributions within the Ex-ante, Ex-post and Switching journeys.

#### **Client Risk Profile**

The Client's default Attitude to Risk will be populated as the Client Risk Profile on illustrations, which can be changed if required on each illustration.

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