Synaptic

Pathways

6.2 Release Notes

1 In this release

This release introduces the integration with CIExpert. The release also includes income analysis advanced modelling, new product coverage on Pathways Protection and enhancements in Holdings, Switching and Research.

The Knowledgebase contains FAQs and guides to walk you through Pathways functionality.

If you require support assistance, contact support@synaptic.co.uk or call 0808 164 5463.

Synaptic Pathways Licensed Features

- Pathways Introductory Pack
- Pathways Cashflow Retirement Edition
- Pathways Comparison and Ex-ante
- Pathways Ex-post
- Pathways Protection
- Pathways Risk Explorer
- Pathways Switching
- Pathways Valuations

To arrange a demo of the new or existing functionality, contact hello@synaptic.co.uk, call 0800 783 4477 or Book a Demo direct from our website.

2 New features

2.1 CIExpert Integration

CIExpert is the UK's leading critical illness comparison service.

Synaptic Pathways Protection users can complete Critical Illness quality research in CIExpert, with pricing populated from Synaptic, make a recommendation and e-apply directly to the provider website.

- Enter scenarios in Pathways Protection to compare product pricing
- Select Critical Illness scenario to compare in CIExpert
- CIExpert will display prices populated from Synaptic
- Complete quality comparison in CIExpert
- Recommend product in CIExpert
- Apply in CIExpert, landing on the provider page to complete application journey

Users must have a valid CIExpert license or sign up for a free trial of CIExpert. For existing Synaptic customers that are new to CIExpert, a discount is available when signing up via the CIExpert/Synaptic link.

This feature requires the Pathways Protection 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.

3 Enhancements to existing features

These are available immediately on Pathways. If you do not have access, please click the 'Request Access' button on the feature within Pathways to arrange a demo or contact one of the team on 0800 783 4477 or hello@synaptic.co.uk.

3.1 Income analysis

Income Analysis journey has been extended to allow for advanced modelling at the results stage, allowing the user to see the impact to retirement when:

- Changing Retirement Goals
- Discussing different charges
- Using different Plans/introducing additional holdings
- Reviewing different source of income
- Changing income requirements.

3.2 Switching

Switch research can now be converted to Ex-ante research.

3.3 Non-fund holding assets

Asset allocation can now be added against non-fund holding assets, such as Property in a SIPP.

3.4 Transaction history table

A Transaction history table has been added against a contact's holding, to record transaction costs relevant to the policy.

3.5 Pathways Protection

New protection products available on quote comparison service for single life:

- Decreasing Term Assurance
- Convertible Term Assurance
- Family Income Benefit
- Whole of Life
- Business Protection

This feature requires additional permissions to your existing 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.

3.6 Annuity quote link

Webline credentials can be entered under My Apps & Settings, which will link out to Webline to complete the Annuity quote request form and produce a comparison.

Note: This will be available from 31st March.

4 General Updates

To ensure Pathways continues to meet customer needs, feedback and reported issues are incorporated with each release.

4.1 Changes

Contact form
Improvements to the new contact form to streamline adding contacts.

Ex-ante Costs and Charges Statement
Updated the ex-ante statement calculation for fund charges in £.

Ex-ante &Ex-post
Decreased the occurrence of session timeouts to improve the user experience.
Issue resolved where a user would not always be able to view the date selector modal.
Issue resolved where withdrawals would not show in the journey or on reports.

Holdings
Unit amounts against funds contained in holdings can now easily be edited.

Income Analysis
Updates to the user interface to improve the experience.

Logos
Provider logos updated to the most recent versions.

Portfolio Factsheets
Blank pages have been removed.

Protection
Updates to text in the journey and sort order on results to improve the user experience.

Valuations
The correct share class can be selected where the provider returns an ISIN code and there are multiple matches.