Synaptic

Pathways

6.4 Release Notes

1 In this release

This release includes the new Paraplanner Access Centre and automated daily unit price updates, along with more enhancements to existing features.

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 Paraplanner Access Centre

The new Access Centre capability allows a paraplanner to carry out work on behalf of an adviser.

Each paraplanner will require their own Pathways licence and will be recorded as a 'Paraplanner' user within a Network or Firm organisation. The administrator of the organisation can set permissions to allow the paraplanner access to the adviser/s as required.

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 Automated daily unit price updates on a holding

Underlying assets with an industry recognised fund code (Citicode, SEDOL, ISIN or MexID) will automatically update the unit prices daily on a holding.

The value of the holding will be stored daily and viewed on the Performance tab.

The number of units held will remain the same, unless updated manually or via the contract valuation service.

Generic funds will require manual updates.

3.2 Client and Family Assets Under Management

During the Ex-post journey, the Optimise button allows you to toggle the Client and Family Assets Under Management within the Assets Under Management tab.

This allows you to include or exclude the Client and Family Assets Under Management from the calculation. The state in the Ex-ante journey will be applied to the Ex-post journey at the point of review.

3.3 Adding an ongoing charge on a plan within Income Analysis

When adding a plan within the income analysis journey, you can record an ongoing charge to include in the calculation.

3.4 Stakeholder pension in comparison research report

For pension research, the stakeholder pension displayed on the results screen for comparison will be displayed in the comparison report.

4 General Updates

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

4.1 Changes

Assign asset allocation to generic fund
Generic funds will show the asset allocation as expected when using a holding within an Ex-post review.

Chart on generic Funds
The asset allocation will display correctly on all charts where generic funds have been used.

Generic funds
The issue preventing an Ex-post review when using an Org Managed Generic Fund has been resolved.

Webline credentials
Within My Apps & Settings, your Webline login credentials are now validated on entry and a notification will be displayed if the details are incorrect. Please contact our customer service team if you do not have a Webline account hello@synaptic.co.uk or call 0800 783 4477.