



# Pathways

6.7 Release Notes



## 1 In this release

This release includes enhancements to the Client Review Process and Cashflow Retirement module along with many more updates 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](mailto: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](mailto:hello@synaptic.co.uk), call 0800 783 4477 or [Book a Demo](#) direct from our website.

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## 2 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](mailto:hello@synaptic.co.uk).

### 2.1 Ex-Post

- A Summary comparison table has been added to the report to display important data points for the previous review and current period
- Opening balance of the next review period is now displayed in the 'Next Period and Remaining Term' Section of the Report
- Transaction history accordion has been updated to only show transaction history relevant to the period in question
- The holding start date is now used as the review period where no previous review has been conducted
- The current holding balance is always the minimum amount used when calculating Client and Family AUM balance with the provider
- When marking Ex-post research as complete, holding updates are confirmed to the user and next steps are explained
- Layout, labelling and formatting of the report has been updated to improve the look, feel and readability
- Several charts in the ex-post review have been refactored to enhance clarity and data representation

### 2.2 Holdings

- Renamed the charges tab on a holding to 'Settings' for configuration of holding variables such as charges, growth rates and switch rates
- A 'Reviews' tab has been added to the holdings. New reviews can be created from this tab and previously conducted reviews will be displayed. Previous reviews can be edited or deleted until completed
- More than one holding of the same type can now be added to On-platform holdings

### 2.3 Funds & Portfolios

- Standard asset allocation models have been removed from Portfolio & Fund Searches where enhanced allocations are available to ensure the most accurate allocation is used

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## 2.4 Cashflow Retirement Edition

- Where the research highlights a shortfall in the amount of income available during retirement vs the income requirement, this will be shown on the report along with the amounts required (overall and monthly)
- The default product charge setting is now defaulted to RIY
- Updates to the colour scheme of chart legends to enhance readability
- Updated labelling in the journey to improve context for user

## 2.5 Costs & Charges Statement

- The Costs & Charges statement has been updated in ex-ante and ex-post to display regular adviser fees on contributions

## 2.6 Firm Level Special Deals (Network Edition)

- Network administrators can create and assign special deals to firms

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### 3 General updates

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

- Using the exclude adviser fees button in ex-ante comparison will retain any existing Assets Under Management in the calculations
- Policy end date calculation issue in ex-post resolved
- The remaining term now updates as expected in ex-post if adjusted in the optimise modal
- The Investment required to reach desired income will no longer suggest a contribution term of 0 months
- State Pension amount is now displayed to 2 decimal places
- Required Annual Income can be entered to 2 decimal places in the advanced tab
- Resolved the calculation issue on projected value of a plan if the research was 'In Retirement'
- Cashflow retirement report loads as expected
- IHDFM portfolios will no longer attempt to calculate performance data for an incomplete range (e.g. 3-year data will not be calculated where 3 years of data does not exist)
- Error no longer displayed in the CIP if a platform is retired

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