



Pathways

6.8 Release Notes



1 In this release

This release includes new reports and enhancements to protection 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 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.

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2 New features and enhancements

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.

2.1 Protection Quote Comparison

- Joint Life quotes are now available within the protection journey
 - Select an existing client or add a new client as the second life
 - Request quotes on single basis for first or second life
 - Request quotes on joint basis selecting both first and second life
 - Benefit card clearly displays basis for quote
- The quote Comparison Report can be generated on the results screen, displaying the quotes returned, their cover basis and costs from the various providers

2.2 Holding Reports

- Reports can be produced for both On-Platform & Off-Platform holdings and will detail key holding information such as Valuation, Risk, Asset Allocation, Contribution and Withdrawal Schedules
- Within the holding screen, select the 'Holding Report' from the dropdown list on the menu bar
- Option to include the Fund Factsheets on each Holding report, providing further detail about the composition of the underlying assets

2.3 Switching Reports

- The Final Report in the switching journey has been updated to include more detailed information related to each individual ceding scheme (where multiple ceding schemes have been used)
 - Critical Yield as %
 - Mid Growth Rate as %
 - Hurdle Rate as %
 - Final Value as £ to 2DP
 - Overall Growth as %
 - Reduction in Yield as %

2.4 Company Branding

- Reports produced from Pathways can now have company branding applied in the form of
 - A Company Logo
 - A Company Primary Colour
 - A Company Secondary Colour
- Branding can be set within the Configuration > Company Settings area

2.5 Holdings Portfolio Import

- When adding new underlying assets to a holding, the user can now select to add an existing Portfolio of funds in addition to adding funds individually

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3 General updates

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

- Starting an Income Analysis session on a client with an unspecified gender will no longer error
- The Statement of costs and charges (Ex-ante & Ex-post) now displays both Platform & Product costs
- In Ex-post, issue when a withdrawal did not have a specified end date has been resolved
- An in-progress Ex-post session will update as expected if changing the selected holding
- Risk categories in Ex-post will no longer show as undefined
- Resolved an error in Ex-post caused by a large amount of historic performance records
- The product fees will no longer revert to 0 when using an alternate product in the Switching journey
- When using an In-House DFM as an underlying asset in an Alternate Product, the In-House DFM headline charge will be used instead of the underlying funds
- Duplicate Providers with the (Risk) Suffix have been removed from the Provider dropdown list in the holdings area
- DFM underlying assets within a holding will display as Type: Discretionary Fund Managers

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