Synaptic

Pathways

6.9 Release Notes

1 In this release

This release introduces an advanced fund search option and the ability to record special deals at a client level, 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.

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 Client Special Deals

- Client special deals can now be created against each contact record within the system. A contact special deal allows a specific charging structure that may have been agreed with a product provider to be applied during the research journeys throughout the system. Client special deals take precedence over any other special deals set in the system

2.2 Cashflow Retirement Edition

- The firms Central Investment Proposition is enforced when moving cashflow retirement research to an illustrative quote unless the user has whole of market permissions
- Additional detail is provided on the enhanced annuity quote retrieved from Webline, with the ability to link direct to the Webline quote form and edit requirements to get a more personalised quote
- Added validation for 2 decimal places for the initial investment
- Changing the value of a plan in the journey will now cause its projected value to update automatically
- Where an annuity projection cannot be obtained, an error will now be displayed

2.3 Switching Journey

- Client holdings which are used as the basis for a ceding scheme in the switch journey that have withdrawals configured against them will now have their withdrawals displayed and considered in the switch journey results
- When selecting a different switch result, the outcome area will update as expected
- The individual ceding scheme section of the report will now reflect single ceding scheme scenarios
- 0% growth rates can be used in the switching journey if required

2.4 Advanced Fund Searches - Portfolio Builder & Fund Lists

- The fund search areas in the portfolio builder and fund list sections now include an 'Advanced Search' option, allowing you to filter on additional items
    - Global Sector
    - Local Sector
    - Parent Funds only
    - Whole of Market Mode
    - Generic Funds

2.5 **Client Holdings**

- A manual performance record can now be added to the holding by visiting the performance tab of a holding, this creates a timestamped record of the holdings valuation

3 General updates

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

- Reduced the occurrence of the ‘Calculating Modal’ in the ex-ante journey when changing the investment, or investment related options
- Cover basis has been extended for whole of life in Protection Pathways to allow quotes on joint life first death or last survivor
- Valuation admin modal will read the correct configuration of the firms valuation settings
- Fixed an issue where updating a valuations providers detail could cause loss/addition of unwanted configuration
- Clicking a history record will now link to display details
- Fixed an issue where the optimise modal would sometimes not automatically calculate 100% asset allocation split
- Funds without an asset allocation will never contribute to a portfolios total asset allocation
- Portfolios without asset allocation can never be used in Ex-Ante
- Single contributions made in the first year will now properly be displayed on graphs and stochastic table projections
- Where data points overlap on the efficient frontier graph, they will now be displayed instead of hidden
- If a fund without an asset allocation is linked to an MPS Portfolio, the asset allocation of the MPS portfolio will display in the holdings area
- Exporting funds from a portfolio should now function correctly
- Contribution and withdrawal end dates cannot go past the holding end date
- The client Capacity for Loss Questionnaire report can now be viewed when the user has not answered all questions