Synaptic

# Pathways

6.10 Release Notes

# 1 In this release

This release includes new income analysis features and improvements to research journeys.

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 Display Reason for Product Exclusion

- The results pages of the research journeys have been updated to show the platforms and products that have been excluded from the research results and the reason why i.e. minimum contribution values and funds unsupported.

## 2.2 Retirement Cashflow Income Analysis

- This update adds additional detail to the journey allowing the user to:
    - capture baseline client expenditure
    - confirm current and in retirement tax rates
    - associate withdrawals to client goals
    - compare different scenarios in results with option to include in the report.
- Future updates to cashflow in following releases will add the ability to research for joint clients, include other assets in the journey, set an income/ top up hierarchy and more.

## 2.3 Holdings

- When adding underlying assets to a holding using a portfolio or from a recommended product in the Ex-ante journey, the value of the underlying funds on the holding are populated automatically based upon the value and split of the portfolio used, saving the user time in filing these out manually.

# 3 General updates

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

- Fixed an issue which caused large fund factsheets to not download to the browser
- Fixed a weighting issue in the underlying assets area of a holding which would sometimes cause an error
- Fixed a weighting issue in the optimise modal of the Ex-post journey which would sometimes cause an error
- Updated validation when creating an Ex-post review to ensure all funds are in a valid state, and to inform the user where they are not
- An error related to ‘No data found for Syncode’ will no longer be displayed in research journeys
- Resolved an issue where certain combinations of funds would prevent the holding report being generated
- Fixed an issue where cash would have an unexpected impact to the risk rating of a portfolio
- Holdings report will now display a cash component.