Are there any tips when filtering?

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- You can see everything you're currently filtering on – and why specific contracts are being excluded – using the audit trail.
- If you make a recommendation to a client which they turn down – e.g. that they need waiver of premium – you can reduce your compliance risk by marking the fact that the relevant feature has been declined. This is then recorded in suitability reports.
- You can see the values for a field before filtering on it by adding the field to the grid. Once you've done that you can then "filter the list by example" by clicking on any of the values in any of the cells in the grid.

If some filtering has already been filled in when you start a new piece of research, then one of two things is happening: either your compliance officer has preset these items, or the filtering has been automatically added by the system on account of the client and benefit details you entered.