

How do I import filtering from old research?

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You can re-use the filtering you've already created in a piece of existing research by importing it into the research you're currently carrying out. You can also import shared research which has been created by your compliance officer.

The screenshot shows a software interface for importing research filtering. At the top, there are search fields for 'Client name' and 'Title', each with a 'Find' button. To the right are buttons for 'Show recent', 'Show shared', and 'Show matches'. Below this is a table with three columns: 'Research', 'Client', and 'Last change'. The table contains seven rows, all with 'Personal Pension (Fully Insured)' in the 'Research' column and '(none)' in the 'Client' column. The 'Last change' dates are: 12/10/2015, 03/08/2015, 13/07/2015, 04/08/2015, 11/08/2015, 11/08/2015, and 13/07/2015. The first row is selected with a radio button. Below the table, there are checkboxes for 'Import: Filtering' (checked), 'Excluded contracts' (checked), and 'Grid fields' (unchecked). At the bottom are 'Do import' and 'Cancel' buttons.

Research	Client	Last change
<input checked="" type="radio"/> Personal Pension (Fully Insured)	(none)	12/10/2015
<input type="radio"/> Personal Pension (Fully Insured)	(none)	03/08/2015
<input type="radio"/> Personal Pension (Fully Insured)	(none)	13/07/2015
<input type="radio"/> Personal Pension (Fully Insured)	(none)	04/08/2015
<input type="radio"/> Personal Pension (Fully Insured)	(none)	11/08/2015
<input type="radio"/> Personal Pension (Fully Insured)	(none)	11/08/2015
<input type="radio"/> Personal Pension (Fully Insured)	(none)	13/07/2015

Import: Filtering Excluded contracts Grid fields

You do this by clicking on the **Import filter** button at the bottom of the list of fields. You can then search for personal or shared research based on client name or the research's title, as illustrated by the screenshot to the right. There are also buttons for showing all your recent research and for showing all shared research.

You simply mark the box next to the research you want to import, and choose whether to include both the filtering from the old research and also any manually excluded contracts.

The details from the old research are then merged into your current research – i.e. combined with any filtering you've already put in place. You can carry out the import process more than once to combine multiple filters into one piece of research.
