

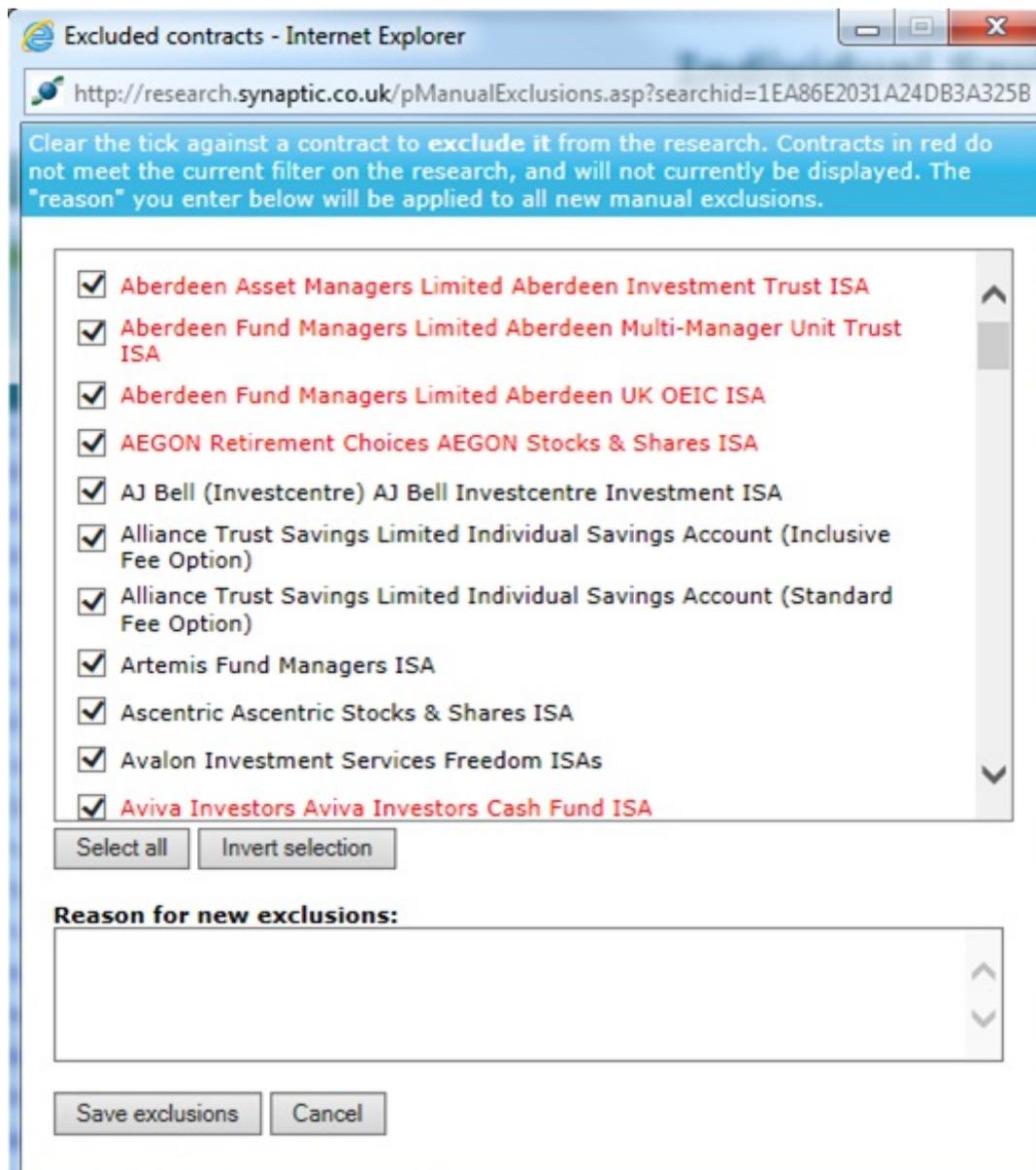
Manually selecting the contracts to research

Last Modified on 14/06/2017 10:44 am BST

The section above describes how the grid of contracts can be filtered to remove contracts which don't meet particular conditions.

However, it's also possible to select manually the contracts which you want to research – either instead of, or as well as, filtering the grid. This feature is commonly used by product providers who want to compare their products against specific competitors, and by advisers who have already eliminated some contracts from their research e.g. because their premiums are uncompetitive.

You can manually exclude contracts by clicking on the text at the top of the grid where it says “**0 manually excluded**”. This displays the pop-up window illustrated by the first screenshot. You simply remove the ticks against any contracts which you don't want to be included in the grid. You also have the option of entering a reason why the contracts are being excluded. Any text you enter here is then included in suitability reports and other reports.



Once you have selected a manual list of contracts you may then want to get a quick comparison of all the features of those contracts. As well as adding fields to the grid, you can also use the **Comparison** tool on the menu bar below the page's title. This displays a "quick view" of all details about the selected contracts, illustrated by the second screenshot, which is suitable for printing or for saving in PDF form.

Comparison grid

[Save as PDF](#) | [Back to filtering](#) | [Help](#)

Choose the information to display

Features Conditions Stats Notes

Company	Avalon Investment Services	AXA Elevate	Seven Investment Management	Standard Life Assurance Ltd	Zurich Intermediary Platform
Contract	Freedom ISAs	Elevate Stocks & Shares ISA - Explicit	ISA (Stocks and Shares)	Wrap ISA	Zurich Intermediary Platform Stocks and Shares ISA Account
Features					
Cash element	No	Yes	Yes	Yes	Yes
Cash based Unit Trust/OEIC	No	Yes	Yes	No	Yes
Cash account	No	Yes	Yes	Yes	Yes
Stocks and shares element	Yes	Yes	Yes	Yes	Yes
Fixed rate of interest	No	No	No	No	No
Variable rate of interest	Yes	Yes	Yes	Yes	Yes
Payment methods	Yes	Yes	Yes	Yes	Yes
BACS	No	Yes	Yes	Yes	Yes
Cash	No	No	No	No	No
Cheque	Yes	Yes	Yes	Yes	Yes
Debit card over telephone	No	No	No	No	No
Debit card via the internet	Yes	No	No	No	No
Direct debit	Yes	Yes	Yes	Yes	Yes
Payment frequency options	Yes	Yes	Yes	Yes	Yes
Single premium	Yes	Yes	Yes	Yes	Yes
Weekly	No	No	Yes	No	No
Fortnightly	No	No	Yes	No	No

a