How do I build grids and filtering contracts?

Last Modified on 02/06/2017 9:16 am BST

The filtering screen provides access to a wealth of functionality. The simplest overview of it is a description of the screen's layout see article:

- The layout of the filtering screen.

This area of the software doesn't just handle filtering of the list of contracts. It is also the central "control panel" for each piece of research that you carry out. Things that you can do from the filtering screen include:

- Filter out contracts (e.g. those which do not fulfil the client's requirements).
- Manually exclude contracts.
- Build a spreadsheet-style grid of data, and save the grid as a PDF or export it.
- View full comparisons of every aspect of selected contracts.
- Generate factsheets for individual contracts or companies.
- View the list of linked funds available on a contract, and pick the best ones in the sectors you are recommending.
- Get the definition of a field (e.g. phased investment facility).
- View notes about contracts.
- Send your research to a colleague – e.g. a paraplanner, or compliance officer.
- Record your own notes about your research – e.g. a to-do list.
- Move on to rank the filtered contracts into a league table, or go straight to generating a report, or get a quote.
- Delete research when you no longer need it.