How do I filter using a grid of contracts?

Last Modified on 31/03/2020 3:27 pm BST

When you start a piece of research, the filtering screen only displays the company and name of the contract:

CAPITA FINANCIAL SOFTWARE			Individual Savings Accounts Stocks and Shares
Filtering (using preset criteria)		+ Ranking + Report Comparison Char	ige title Save as PDF Delete Cupy Send Nut shared Holp
Peatures Sectors Conditions Stats PP 1	AE 75 cm	stracts - 0 manually excluded	Optiona
Payment methods	*		
Payment frequency options	Company	Contract	
ulith Profit (100%)	Aberdeen Asset Management	Aberdeen Investment Trust ISA	
Enhanced death benefit	Aberdeen Asset Management	Aberdeen Multi-Manager Unit Trust IBA	
Add dharges on top of investment	Aberdeen Asset Hanagement	Aberdeen UK OEIC ISA	
No penalty for ceasing monthly payments	AEGON Retirement Choices	AEGON Stocks & Shares ISA	
	AJ Bell (Sippoentre)	A3 Bell Sippoentre Investment ISA	
No penalty for reducing monthly payments	Aliance Trust Savings Limited	ISA - Stocks & Shares Component	
Accepts transfers in	Allianz Global Investors	Investment Punds 184	
Allows transfers out	Artemis Fund Nanagers	ISA	
Regular withdrawal facility	Ascentric	Ascentric Stocks & Shares 18A	
	Availan Investment Services	Preedore 154a	
Dividends taken as income	Asive Investors	Aviva Investors Investment 15A	
All switches free	Avive Wrep UK Ltd	Avivo likap ISA Perticko	
Pertial switch allowed	AXA Elevate	Elevate Stocks & Shares 15A - Composite	
Phased investment facility	AXA Elevate Sellie Gifford	Bevale Stocks & Shares 154 - Explicit Seille Gifford Investment Trust ISA	
Re-registration option	Capita Financial Managers	ISA	
Share exchange facility	Cofunda Ltd	154	
Open architecture	Ecclesiestical	The Ecclesianical ESA	
Partial withdrawal no penalty	PBC Fund Hanagement Limited	PAC ISA	
Pareas withdrawar no pasaity	M FBC Unit Management Ltd	Foreign & Colonial Investment Trust	
Cear al fitters Audit trail Import fitter	Fidelity Fundstletwark	Fundshetwork	

Any number of data fields can be added to the grid to view by simply selecting (clicking on) the field name from any of the tabs on the left hand side of the grid:

Filtering			• Ranking •	Report Con	parison C	hange title	Save as PDF	Delete Copy	
Features Sectors Conditions S	ats PP 🔳		All 75 contracts - 0 manually excluded						
Maximum age at entry (nb))+ M	Company	Contract	Accepts transfers in	Hodel	All switches			
Minimum monthly contribution (£)	26 1								
Minimum single contribution (£)	24 14	Aberdeen Aspet Nar	Aberdeen Investment Trust ISA	Yes	No	No	No	610	
Minimum single contribution per	3+ W	Aberdeen Azzet Mer	a Aberdeen Nulti-Nanager Unit Trust	Yes	Na	Yes	No	610	
fund/trust (£)		Aberdeen Asset Mar	e Aberdeen UK OEIC ISA	Yes	No	Yes	Yes	£50	
Hinimum monthly withdrawal (£)	20 10	AEGON Retirement	C AEGON Stocks & Shares ISA	Yes	Yes	Yes	Yes	£20	
Minimum annual withdrawal (£)	24 14	AJ Sell (Sippcentre)	Al Bell Sippoentre Investment ISA	Yes	No	No	Yes	None	
Minimum remaining balance (£)	24 14		p ISA - Stocks & Shares Component	Yes	No	No	Yes	£50	
		Allianz Global Invest	to Investment Funds ISA	Yes	No	No	Yes	620	
linimum transfer value (£)	20 10	Arbemis Fund Nanag	e ISA	Yes	No	No	Yes	65	
Objective of DSA		Ascentric	Ascentric Stocks & Shares ISA	Yes	No	No	Yes	Non	
interest rate (cash) %		Avaion Investment :	S-Freedom ISAs	Yes	Yes	Yes	Yes	£80 (£40 per fu	
Additional charges		Avive Investors	Aviva Investors Investment ISA	Yes	No	Yes	Yes	45	
and a second and a second a s		Aviva Wrap UK Ltd	Avive Wrep ISA Portfolio	Yes	Yes	Yes	Yes	45	
Dealing charge		AXA Elevate	Elevate Stocks & Shares 194 - Cor	Yes	Yes	Yes	Yes	£10	
Partial withdrawal charge (£)		AXA Elevate	Elevate Stocks & Shares ISA - Exp	Yes	Yes	Yes	Ves	610	
full withdrawal charge (£)		Baillie Gifford	Sailie Gifford Investment Trust 15.	Yes	No	No	No	£10	
Exit charge within 1 year	2e W	Capita Financial Mar	e ISA	Yes	No	No	Yes	£5	
tour cuarbe works a kear		Cofunds Ltd	ISA	Yes	Yes	No	Yes	45	
txit charge after 1 year	2= M	Ecclesiestical	The Ecclesiestical ISA	Yes	No	No	Yes	62	
Exit charge after 2 years	2= M	F&C Fund Hanagem	erF&C ISA	Yes	No	Yes	Yes	£5	
Exit charge after 3 Years	20 14	F&C Unit Hanageme	n Foreign & Colonial Investment Tru	Yes	No	No	No	65	
Clear al fiters Audt trai	Impot fiter	Fidelity PundsNetwor	* PundeNetwork	Yes	Yes	No	Yes	450	
		Edally, Gundantistics	A E-adatterande Assault Eas	War	Water.	Wast	Water	15	

The Field chooser

The section above explains how to add fields to the grid one at a time. Alternatively,

you can add multiple fields at once by using the field chooser option.

Select **Options** from the top right of the screen and **Field chooser:**



A pop up window will be displayed listing all the fields to choose from:

Fie	ld ch	ooser \	¥ebpage Dia	log			
🕘 http	o://res	earch.synaj	ptic.co.uk/vsr/p	FieldChoo	ser.asp?searchid=f	F27C96F2F62C4	17E 💙
Featu	ires	Sectors	Conditions	Stats	Past performar	nce	
Sele	ct all	Invert se	lection Clear	all] ^
F	ayme	ent metho	ds				
	BAC	CS					
] Che	eque					
] Deb	oit card ov	er telephone				
] Deb	oit card via	a the internet				
] Dire	ect debit					
F	ayme	ent freque	ncy options				
] Sing	gle premiu	m				
] Wee	ekly					
		tnightly					
	-	/eekly					
		http					
		arterly					
	-	mly					
	-	f yearly					
		nually					
_		rofit (100					
		ced death					
	101	% bid val	ue				*
Sav	e selec	ction (Cancel (Clear <mark>a</mark> ll fie	lds		
the	scoard	h cupantic c	:o.uk/vsr/pField	Thooser -			

Simply tick the fields you want to include in the grid and select save selection. The fields will then be displayed in the grid as seen earlier in this article.

If you want to view all the fields we would recommend you use the**Comparison** tool rather than adding all fields to the grid. This is due to the amount of data it can result in the system running slowly. Please refer to the **Comparison** tool article for more information.

Removing fields from the grid

Selecting (clicking on) the field name from the list on the left hand side will remove the column of data from the grid.

You can also remove a column of data by right clicking on the column header and selecting **Remove from grid** from the pop up menu:

All switches free	Unit Trust: IMA UK All Companies	Minimum monthly contrit Field opti	ons
No	No	Remove	from grid
Yes	No	Sort asce	ending
Yes	Yes	Sort des	cending
Yes	Yes	£20	
No	Yes	None	
No	Ves	£50	

You can also remove all the columns that have been added by selecting**Options** from the top right of the screen and **Remove all fields**:



Hiding the list of fields

If you added a large number of fields and you are having to use the scroll bar along the bottom of the screen to view all the columns, you can make more space on the screen by removing the field list on the left hand side. Select **Options** from the top right of the screen, as shown above and select**Hide field list:**

	All 75 contracts - 0 manually ex					
Company	Contract	Accepts transfers in	Model portfolios	All switches free	Unit Trust: IMA UK All Companies	
Aberdeen Asset Nan	a Aberdeen Investment Trust ISA	Yes	No	No	No	£100
Aberdeen Asset Man	e Aberdeen Hulti-Manager Unit Trust	Yes	No	Yes	No	£100
Aberdeen Asset Nan	e Aberdeen UK OEIC ISA	Yes	No	Yes	Yes	£50
AEGON Retirement of	C AEGON Stocks & Shares ISA	Yes	Yes	Yes	Yes	620
AJ Bell (Sippcentre)	AJ Bell Sippcentre Investment ISA	Yes	No	No	Yes	None
Alliance Trust Saving	15A - Stocks & Shares Component	Yes	No	No	Yes	£50
Allianz Global Invest	c Investment Funds ISA	Yes	No	No	Yes	£200
Artemis Fund Manag	e ISA	Yes	No	No	Yes	£50
Ascentric	Ascentric Stocks & Shares ISA	Yes	No	No	Yes	None
Avalon Investment S	Freedom ISAs	Yes	Yes	Yes	Yes	£80 (£40 per fun
Aviva Investors	Aviva Investors Investment ISA	Yes	No	Yes	Yes	£50
Avive Wrep UK Ltd	Aviva Wrap ISA Portfolio	Yes	Yes	Yes	Yes	£50
AXA Elevate	Elevate Stocks & Shares ISA - Cor	Yes	Yes	Yes	Yes	6100
AXA Elevate	Elevate Stocks & Shares ISA - Exp	Yes	Yes	Yes	Yes	£100
Baillie Gifford	Bailie Gifford Investment Trust IS	Yes	No	No	No	£100
Capita Financial Nan	ASISA	Yes	No	No	Yes	£50
Cofunds Ltd	ISA	Yes	Yes	No	Yes	£50
Ecclesiastical	The Ecclesiastical ISA	Yes	No	No	Yes	625
F&C Fund Manageme	er F&C ISA	Yes	No	Yes	Yes	650
F&C Unit Manageme	n Foreign & Colonial Investment Tru	Yes	No	No	No	£50
Fidelity FundsNetwor	k FundsNetwork	Yes	Yes	No	Yes	£50
Cidation Considentiations	. E-milettek-maile Assessmit Enn	Was		Var	Vac	150

The list can be re-displayed by selecting **Options** and **Show field list**.

Sorting the grid

By default the grid of contacts is sorted by the company name and then by contract name. The field on which the grid is currently sorted is highlighted in a darker blue in the column heading.

You can sort the grid on a different column simply by selecting the column heading.

Alternatively, you can right click over the column heading and select either **Sort** ascending or **Sort descending**:

All switches free	Unit Trust: IMA UK All Companies	Minimum monthly contrit Field options
No	No	Remove from grid
Yes	No	Sort ascending
Yes	Yes	Sort descending
Yes	Yes	£20
No	Yes	None
No	Yes	650

Changing the order of data fields in the grid

Once you have added fields to the research grid, you can change the order of the columns by selecting **Options** from the top right of the screen and **Change field order**. A pop up window will display the fields you are currently viewing in the grid:

-		
	🖉 Field order Webpage Dialog 🛛 🛛 🔀	
11	🔊 http://research.synaptic.co.uk/vsr/pFieldOrder.asp?searchid=F27C96F2F62C47B24 😒	
r	Use the arrow icons to move fields up and down. Or use the up and down arrow keys to change the selected field, and then the u and d keys to move the selected field.	ł
r	Accepts transfers in	I
GC	★↓ Model portfolios	I
36	★↓ All switches free	I
ar	★↓ Minimum monthly contribution (£)	I
ar	★ Minimum transfer value (£)	I
er	★ Additional charges	I
e		
k		I
18		I
R		I
l.		I
1		
li		
bit	Save order Cancel	
u		
e	http://research.synaptic.co.uk/vsr/pFieldOrder.asp? 🌍 Internet	1
		4

You can change a field's position by selecting the up and down arrows next to the field's name.

Once you are happy with the revised order of fields, select**Save order**.

You will be returned to the grid with the fields in their new order.

Flipping the grid

Note - Flipping the grid only applies to product research. It is not available on fund research.

When you are dealing with a small number of contracts and a large number of data fields. It can be easier to view the grid with the contracts along the top rather than down the side.

The grid can be flipped by selecting **Options** from the top right of the screen and **Flip** grid:

	AEGON Retirement Choices	AJ Bell (Sippcentre)			
Field/contract	AEGON Stocks & Shares ISA	AJ Bell Sippoentre Investment ISA	Ascentric Stocks & Shares ISA		Aviva Wrap ISA Portfolio
Accepts transfers in	Yes	Yes	Yes	Yes	Yes
All switches free	Yes	No	No	Yes	Yes
Indel portfolios	Yes	No	No	Yes	Yes
linimum monthly contribution (£)	£20	None	None	£80 (£40 per fund)	£50
Additional charges	£0	£0	£0	£0	£0
inked funds	1842	2831	2656	3565	1869
Special offer	No	No	No	No	No
IoM funds	Yes	Yes	Yes	Yes	Yes
Unit Trust: IMA UK All Companies	Yes	Yes	Yes	Yes	Yes

When in **"Flipped"** mode the grid continues to be usable as before, except you can no longer sort by clicking on the column headings.

Filtering on field values in the grid

When you have added a data column to the grid you can filter the grid from the values displayed. For example the data column may contain a mixture of **'Yes'** and **'No'**, if you want to filter on the **'Yes'**, simply right click on **'Yes'** and select **Filter on this value**:



This can be useful when you have added fields to the grid to see which contracts offer that feature and then only filter on the relevant value.

If you right click on a numeric field you get different options in the pop up window to perform the filter:

2831	No
2656	No
Filter opt	ions
Greater Less or e Equal to	or equal to equal to
Show co	ntents
1849	No

You cannot filter on fields which are purely textual with notes about the contract. If you select these fields a pop up window will display the notes in full.

Saving and exporting the research grid

The research grid, including all the data fields that have been added, can be saved in PDF format by selecting **Save as PDF** from the menu bar:

d Optic							
	Change title Save as PDF Delete Copy Send Not shared Help						
arges Linked Special MoM funds IMA Uk	arges	Linked	Special offer	MoM funds	Unit Trust:		