Manually selecting the contracts to research

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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.

Excluded contracts - Internet Explorer	
ar the tick against a contract to exclude it from the research. Contract meet the current filter on the research, and will not currently be displason" you enter below will be applied to all new manual exclusions.	cts in red d
Aberdeen Asset Managers Limited Aberdeen Investment Trust IS	
 Aberdeen Fund Managers Limited Aberdeen Multi-Manager Unit T ISA Aberdeen Fund Managers Limited Aberdeen UK OEIC ISA 	rust
Aberdeen Fund Managers Limited Aberdeen ok OEIC ISA	
☑ AJ Bell (Investcentre) AJ Bell Investcentre Investment ISA	
Alliance Trust Savings Limited Individual Savings Account (Inclus Fee Option)	ive
Alliance Trust Savings Limited Individual Savings Account (Stand Fee Option)	ard
Artemis Fund Managers ISA	
Ascentric Ascentric Stocks & Shares ISA	
✓ Avalon Investment Services Freedom ISAs	
Aviva Investors Aviva Investors Cash Fund ISA	
Select all Invert selection	
eason for new exclusions:	
Save exclusions Cancel	

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. SYNAPTIC SOFTWARE

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Company	Avalon Investment Services	AXA Elevate	Seven Investment Management	Standard Life Assurance Ltd	Zurich Intermediary Platform Zurich Intermediary Platform Stocks and Shares ISA Account	
Contract	Freedom ISAs	Elevate Stocks & Shares ISA - Explicit	ISA (Stocks and Shares)	Wrap ISA		
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	
/ariable rate of interest	Yes	Yes	Yes	Yes	Yes	
wyment 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	
ayment 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	

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