How do I import filtering from old research?

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.

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.