How do I filter using a grid of contracts?

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

Filtering (using preset criteria)			Stocks and Shares
		+ Ranking + Report Comparison Char	nge title Save as POF Delete Cupy Send Nut shared Help
feetures Sectors Conditions Stats PP 🔳	All 25 cos	stracts - 0 manually excluded	Options
Payment methods	*		
Payment frequency options	Company	Contract	
Usith Profit (100%)	Aberdeen Asset Hanegement	Aberdeen Investment Trust ISA	
Enhanced death benefit	Aberdeen Accet Management	Aberdeen Multi-Manager Unit Trust 195	
Add drunges on tap of investment	Aberdeen Asset Management	Aberdeen UK OEIC ISA	
	AEGON Resirement Choices	AEGON Stocks & Shares ISA	
No penalty for beasing monthly payments	AJ Sell (Sippcentre)	AJ Sell Supportire Investment ISA	
No penalty for reducing monthly payments	Aliance Trust Savings Limited	ISA - Stocks & Shares Component	
Accepts transfers in	Alianz Olabal Investors	Investment Funds 184	
Allows transfers out	Artemis Fund Nanagers	ISA	
Regular withdraval facility	Ascentric	Ascentric Stocks & Shares 19A	
	Availan Investment Services	Freedore 154a	
Dividends taken as income	Aviva Investore	Aviva Investors Investment 15A	
All avitzhea free	Avive Wrep UK Ltd	Avive Ilinep ISA Ferticite	
Partial switch allowed	AXA Elevate	Elevate Stocks & Shares 15A - Composite	
Phased investment facility	AXA Elevate	Elevate Stocks & Shares 184 - Explicit	
	Sellie Gifford	Beillie Gifford Investment Trust ISA	
Revregistration option	Capita Financial Managers	184	
Share exchange facility	Cofunda Ltd	154	
Open architecture	Ecclesiantical	The Ecclesiantical ISA	
Partial withdrawal no penalty	PBC Fund Hanagement Limited	PAC ISA	
	FBC Unit Nanagement Ltd Fidelity Fundstletwork	Foreign & Colonial Investment Trust Fundationals	

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:

Features Sectors Conditions S	teta PP 🔳							
Maximum age at entry (nb) Minimum monthly contribution (£)	3= ¥	Company	Contract				Unit Trust: 1945 UK All Companies	
Minimum single contribution (£)	3= 54	Aberdeen Asset Nar	Aberdeen Investment Trust 154	Yes	No	No	No	610
Minimum single contribution per fund/trust (£)	24 1	 A second contraction of the second sec	a Aberdeen Nulti-Nanager Unit Trust	Yes	No	Yes	No	610
Minimum monthly withdrawal (£)	>= 👽		z Aberdeen UK OEIC ISA C AEGON Stocks & Shares ISA	Yes	No Ves	Yes	Yes	£5 62
Minimum annual withdrawal (4)	2= 👽		Al Bell Sippoentre Investment ISA	Yes	No	No	Yes	Nore
Minimum remaining balance (£)	>= 🗸		g ISA - Stocks & Shares Component		No	No	Yes	
Hinimum transfer value (6)	24 14	Alianz Global Inves Artemis Fund Nanac	tc Investment Funds ISA	Yes	No	No	Ves Yes	620
Objective of ISA		Ascentric	Ascentric Stocks & Shares ISA	Yes	No	No	Yes	
Interest rate (cash) %		Avalon Investment :	B Freedom ISAs	Yes	Yes	Yes	Yes	£80 (£40 per fu
Additional charges		Aviva Investors	Aviva Investors Investment ISA	Yes	No	Yes	Yes	
Dealing charge		Avive Wrep UK Ltd	Avive Wrep ISA Portfolio	Yes	Yes	Yes	Yes	
		AXA Elevate	Elevate Stocks & Shares ISA - Cor	Yes	Yes	Yes	Yes	
Partial withdrawal charge (£)		AXA Elevate	Elevate Stocks & Shares ISA - Exp	Yes	Yes	Yes	Yes	610
full withdrawal charge (£)		Seillie Gifford	Bailie Gifford Investment Trust 15	Yes	No	No	No	
Exit charge within 1 year	20 1	Capita Financial Mar		Yes	No	No	Yes	
Exit charge after 1 year	24 14	Cofunds Ltd	ISA	Yes	Yes	No	Yes	45
a second a s		Ecclesiestical	The Ecclesiestical ISA	Yes	No	No	Yes	£2
ixit charge after 2 years	3= M	F&C Fund Nanagem		Yes	No	Yes	Yes	
Exit charge after 3 Years	20 14		n Foreign & Colonial Investment Tru	Yes	No	No	No	
Clear al fiters Audt trai	Import filter	Fidelity FundeNetwo	* FundeNetwork	Yes	Yes	No	Yes	45

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:

e	Field chooser Webpage Dialog	×
4	http://research.synaptic.co.uk/vsr/pFieldChooser.asp?searchid=F27C96F2F62	2C47E 💙
	Features Sectors Conditions Stats Past performance	
	Select all Invert selection Clear all	
	Payment methods	
	BACS	
	Cheque	=
	Debit card over telephone	
	Debit card via the internet	
	Direct debit	
	Payment frequency options	
	Single premium	
	Weekly	
	Fortnightly	
	4 Weekly	
	Monthly	
	Quarterly	
	Termly	
	Half yearly	
L	Annually	
	With Profit (100%)	
L	Enhanced death benefit	
	101% bid value	~
(Save selection Cancel Clear all fields	
Ľ		
Ь	ttp://research.synaptic.co.uk/vsr/pFieldChooser.as 😜 Internet	

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:

	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	£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:**

Filtering	+ Ranking + Report Comparison Char							
	All 75 contracts - 0 manually e	ccluded	Juded					
Company		Accepts transfers in	Model portfolios		Unit Trust: IMA UK All Companies	Minimum monthly contribution (E)		
Aberdeen Asset Mana	Aberdeen Investment Trust ISA	Yes	No	No	No	£100		
Aberdeen Asset Mana	Aberdeen Nulti-Manager Unit Trust	Yes	No	Yes	No	£100		
Aberdeen Asset Nana	Aberdeen UK OEIC ISA	Yes	No	Yes	Yes	£50		
AEGON Retirement 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	ISA - Stocks & Shares Component	Yes	No	No	Yes	£50		
Allianz Global Investo	Investment Funds ISA	Yes	No	No	Yes	£200		
Artemis Fund Nanage	ISA	Yes	No	No	Yes	650		
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		
Aviva Wrap 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	Baillie Gifford Investment Trust IS	Yes	No	No	No	£100		
Capita Financial Mana	ISA	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	F&C ISA	Yes	No	Yes	Yes	650		
F&C Unit Managemen	Foreign & Colonial Investment Tru	Yes	No	No	No	£50		
Fidelity FundsNetwork	FundsNetwork	Yes	Yes	No	Yes	£50		
Cidalian Conditionand	E-adaltakeesel. Assault Eas	Max	Van	Mas	Van	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	1
Yes	Yes	Sort descendin	g
Yes	Yes	£20	
No	Yes	None	
No	Yes	£50	

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:



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				
Field/contract	AEGON Stocks & Shares ISA	AJ Bell Sippoentre Investment ISA	Ascentric Stocks & Shares ISA		Aviva Wrap ISA Portfolic
Accepts transfers in	Yes	Yes	Yes	Yes	Yes
All switches free	Yes	No	No	Yes	Yes
Model portfolios	Yes	No	No	Yes	Yes
Minimum monthly contribution (£)	£20	None	None	£80 (£40 per fund)	£50
Additional charges	£0	£0	£0	£0	E
Linked funds	1842	2831	2656	3565	1869
Special offer	No	No	No	No	N
MoM 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 op	tions
Greater	or equal to
Less or	equal to
Equal to	0
Show o	ontents
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:

otoeks and ondres

Change title Save as PDF Delete Copy Send Not shared Help						
l Options						
arges	Linked funds	Special offer	MoM funds	Unit Trust: IMA UK All Companies		