

How do I change the title of research?

Last Modified on 10/01/2024 12:36 pm GMT

Each piece of research is automatically given a title, based on the product type and the client's details (if any). You can change the title of the research to make it more memorable using the **Change title** link on the menu bar.

There are a number of scenarios where this is particularly useful:

- You intend to use the research as a template for creating new research, using the **Copy** functionality, and want to make the title more memorable.
 - You have already used the **Copy** link to create a copy of existing research, and want to remove the **"Copy of"** text from the title of the new research.
 - You are creating shared research for other users to import.
 - You simply want the research to be easier to find in the recent tab of the home page.
 - You are creating multiple preset criteria for a type of product, and want to make it easier for advisers to distinguish between them.
 - You are using a **Manual fund list** as a form of model portfolio.
-