

Have you got any tips on filtering?

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Here are some tips when filtering contracts and where relevant, funds:

- You can see everything you are currently filtering on and why specific contracts/funds are being excluded by using the Audit Trail
- If you make a recommendation to a client which they turn down e.g. waiver of premium, you can reduce your compliance risk by marking the feature was declined by the client. This is then recorded in the suitability report
- You can see the values for a field before filtering on it by adding the field to the grid.
- If some filtering has already been filled in when you start a new piece of research, then one of two things has happened - either your compliance officer has preset those items or the filtering has been automatically added by the system on account of the client and benefit details you have entered

For more information on all these areas, please refer to the relevant articles.
