

Portfolio Deltas

Administrator

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Inhaltsverzeichnis

Portfolio Deltas	3
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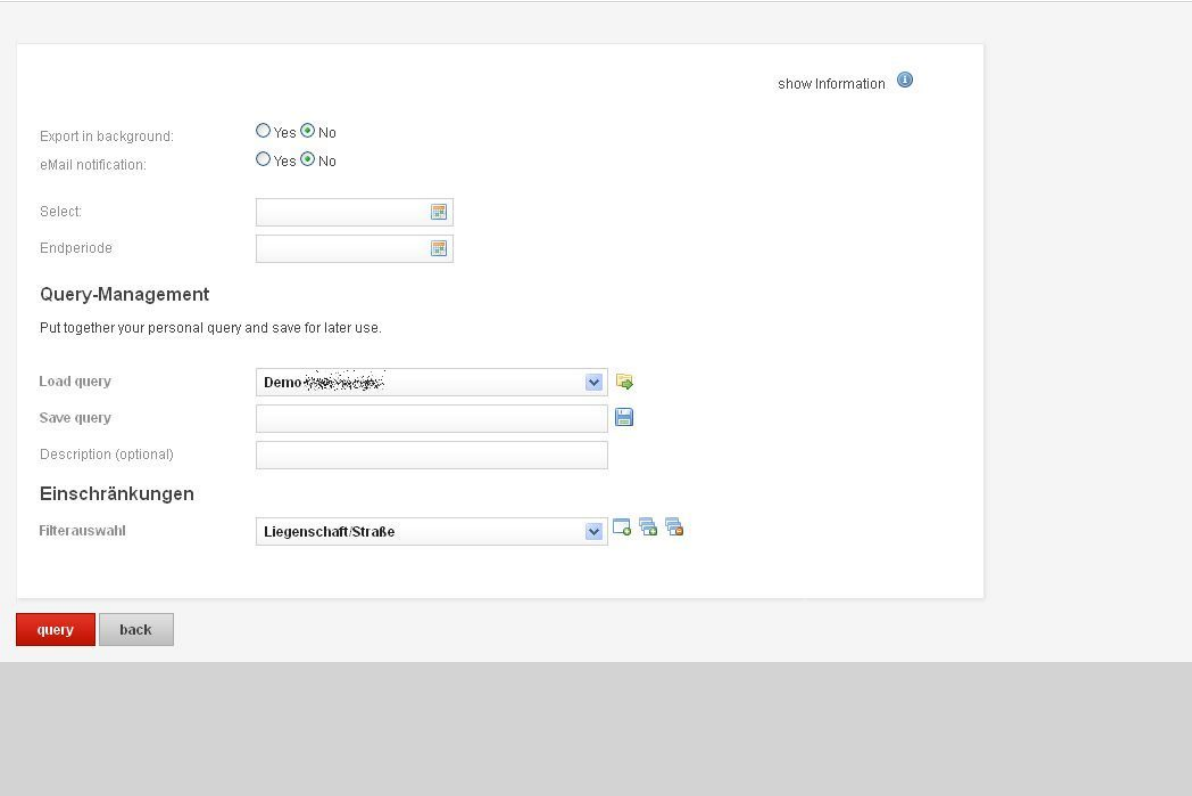
Portfolio Deltas

With the menu *Reporting > Standard > Portfolio Deltas* you can arrange all bought and sold objects of an chosen period on different limitations.

With the button: *Query* you get a result in table style. It is advisable to choose the option: *Export in the background* when you have long reports, complex calculations or when your system uses a VPN or goes through a firewall.

With the button: *Query* you start the report, during this you can see on the top right of your screen a message that the engine works on the report. Additional you can choose the option: Notification with e-mail (if not you just see on the top right a small popup, with the announcement of the generating report). In this case you have to configure in an e-mail address. For security reasons the compiled tables will remain for by default one month in the system.

With the button: *Back* you get a form which you need to limit query-filters or reset the fields on a default value.



The screenshot shows a web interface for configuring a query. At the top right, there is a 'show Information' link with an information icon. Below this, there are two radio button options: 'Export in background:' with 'Yes' and 'No' (where 'No' is selected), and 'eMail notification:' with 'Yes' and 'No' (where 'No' is selected). There are two input fields labeled 'Select:' and 'Endperiode:'. Below these is a section titled 'Query-Management' with the instruction 'Put together your personal query and save for later use.' This section contains a 'Load query' dropdown menu with 'Demo' selected, a 'Save query' button, and a 'Description (optional)' text area. Below this is a section titled 'Einschränkungen' with a 'Filterauswahl' dropdown menu showing 'Liegenschaft/Straße'. At the bottom of the form, there are two buttons: a red 'query' button and a grey 'back' button.

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With the button: *Query* you get as the result an output of all bought and sold objects of the desired period.

Yet you have another question leave it on this site for the metamagix-support-team.