

Portfolio Deltas

Administrator

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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.

show Information ⓘ

Export in background: ☐ Yes ☒ No

eMail notification: ☐ Yes ☒ No

Select:

Endperiode:

Query-Management

Put together your personal query and save for later use.

Load query:

Save query:

Description (optional):

Einschränkungen

Filterauswahl:

query **back**

Portfolio deltas

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.