

Search the documents that interest you

How to filter and create your own document view in your SFA Online account

Providing our clients all generated documents is a regulatory requirement, but there are many of them! This is how you can get a quick overview of the documents relevant to you.

Step 1

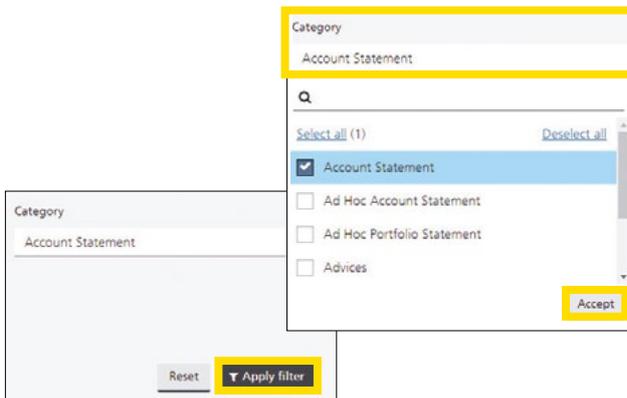
Filtering your documents

Log-in to SFA Online, click on the “Document” icon on the top right-hand side.



Step 2

In the “Document Overview” page, expand the Filter functionality and select the document categories which interest you, click on “Accept”, then on “Apply filter”. You can revert to the original view by clicking on “Reset”.



Step 3

As a result, the selection is automatically adjusted.

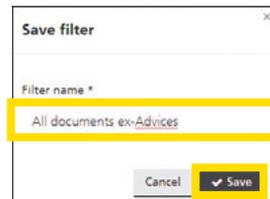
Document name	Category	Date	Date received
Account Statement 01.12.2022 - 31.12.2022	Account Statement	31.12.2022	01.01.2023
Account Statement 01.12.2022 - 31.12.2022	Account Statement	31.12.2022	01.01.2023
Account Statement 01.12.2022 - 31.12.2022	Account Statement	31.12.2022	01.01.2023

Step 4

Creating your own view

After the filtering, you may save and create your own view by clicking on “Save filter”.

Give a name to your newly created filter and Save.



Step 5

Your own view is configured and available in one click.



Step 6

Modifying or deleting your view

You can amend your view by selecting the respective view and clicking on “Actions”.

