Vontobel



Vontobel Swiss Financial Advisers AG/January 2023

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 4

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.



Document overview

The filter was created

Creating your own view

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'.

| | Category | | | |
|-------------------|----------------------------|--------------|--|--|
| | Account Statement | | | |
| | ٩ | | | |
| | Select all (1) | Deselect all | | |
| | Account Statement | | | |
| Category | Ad Hoc Account Statement | | | |
| Account Statement | Ad Hoc Portfolio Statement | | | |
| | Advices | - | | |
| | | Accept | | |
| | | | | |
| Reset | Apply filter | | | |

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".



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 | |

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