

Sorting, Filters and Grid Export

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The sorting, filters and export features are located on both the Global and Plan level dashboards. Each of the headers at the top of the grid can be used for sorting purposes. Simply click the header of your choice and the software will sort by alpha or numerical order depending on the header.

The filters can be used to narrow down the data in the grid based on your selections. For example, if you select a specific status from the drop down menu, the grid will only display distributions with that particular status. The software gives you the option to sort on a specific status, a date range, participant name, and distribution type.

Once you've made your selections using the sorting and filters, you can also export the results using the "Export" button in the bottom right hand side of the grid on the global and plan level dashboards and then select "Export Grid". If you want to export the full details for each selected distribution, choose "Export Full Data".

Home > Edit Company > Edit Plan > Distribution Manager

DTS Sample 401(k) Plan

Company ID: | Plan ID: DTS-HRG | PYE: 12-31 | EIN: 12-1234567 | Plan Number: 001

Module Options

PORTAL DISTRIBUTIONS

Distributions | Participants | Specifications

19 Statuses Selected From To Find by Name or Distribution Type Start Distribution

First Name	Last Name	SSN	Plan Name	Involuntary	Distribution Type	Status	Alert	Last Update	Started	Owner
08/21/2018	08/07/2018	Holly (HollyRG)	Open							
08/20/2018	08/07/2018	Holly (HollyRG)	Open							
08/01/2018	08/01/2018	Holly (HollyRG)	Open							

Export Grid
Export Full Data
Export