BUILD, SAVE AND SHARE CUSTOM VIEWS
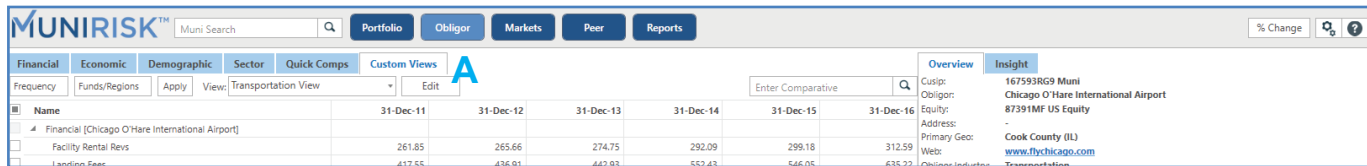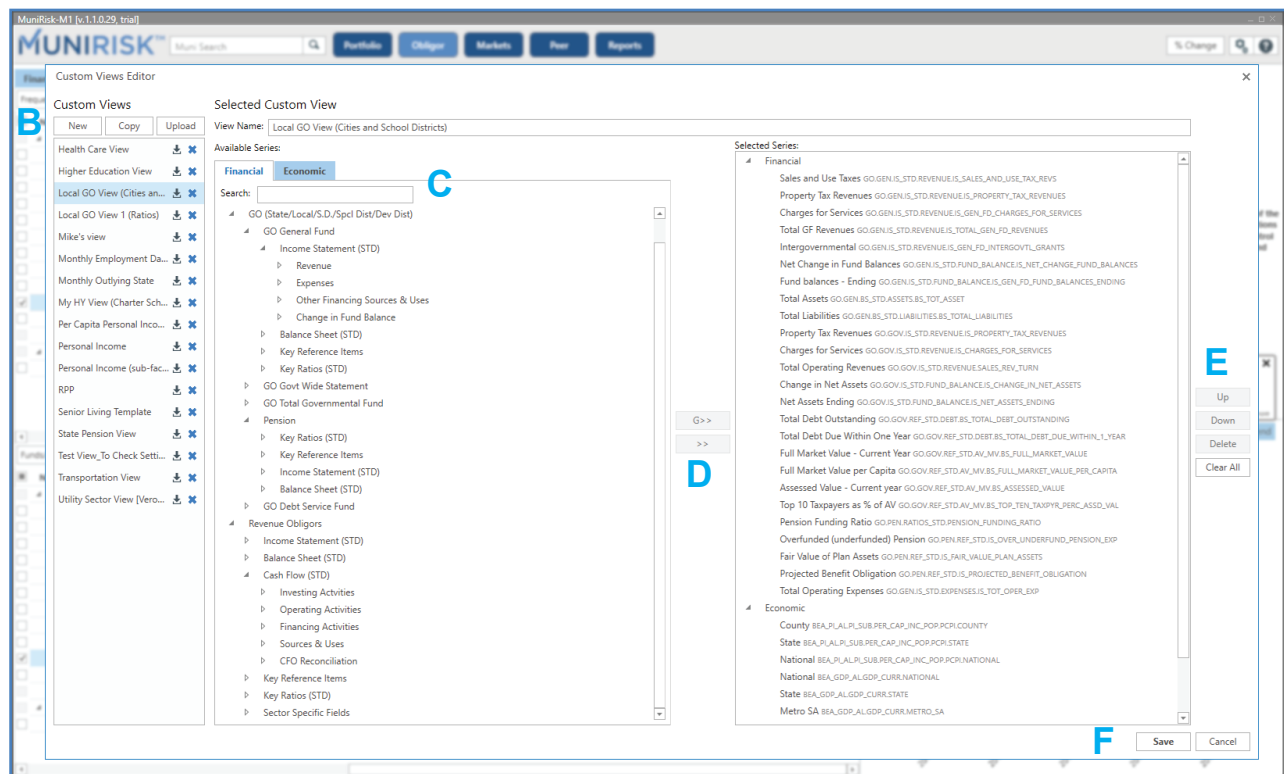
- In **Obligor View**, select the Custom Views Tab. A Click Edit to get started.

- The Custom Views Editor window will appear. To create a new view, click New B and give your view a name. *(Saved views appear on the left. Click saved views to edit. Duplicate a view with Copy or delete a view altogether.)*

- Plug keywords into the search field C to find preferred data series or data groups by name. You can also manually select data series or groups with the expandable/collapsible data tree.

- Click the >> button D to pull your selected data point into the View Template widget to the right. G >> pulls in an entire data group.

- Use the Up / Down keys to the right to re-order data series or groups to your liking. Click Delete to remove a series or Clear All to start building the template from scratch again. E

- Click Save to save a new view or to apply edits to an existing one. F

- Click the Download button next to any of the Saved Views to download and share a view (.cv file) with a colleague. B

- Upload a view (.cv file) from someone by saving to your desktop and clicking the Upload button. B

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BUILD, SAVE AND SHARE CUSTOM VIEWS, CONT'D

- The example Transportation View below depicts how preferred financial data series / data groups appear in the Custom Views tab.
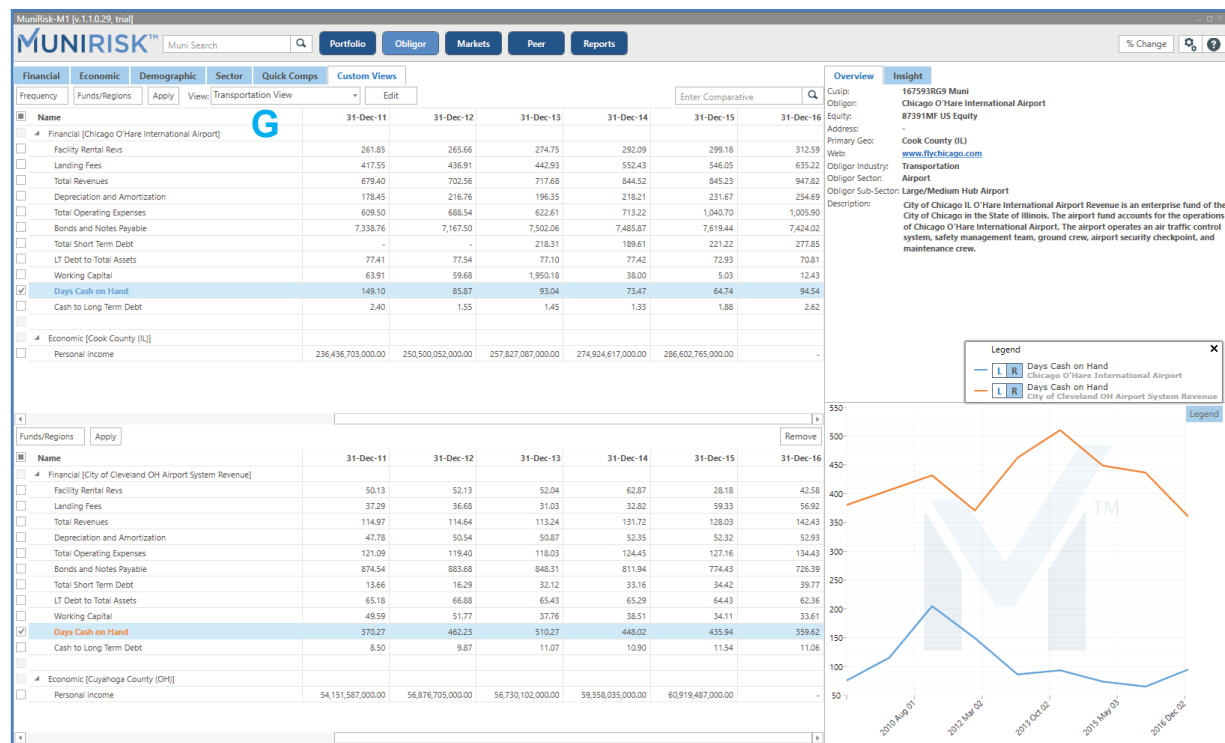
- Conduct credit analysis following the same instructions listed in the user guides for Financials, Socioeconomic and Sector Tabs.
- Choose from multiple Custom Views by clicking the View dropdown menu G.