Screening for Ideas

Idea Screening provides a workflow-driven, customizable application that allows you to screen for potential investment opportunities, find potential buyers, track trends, and identify precedent transactions. For a guided tour of Idea Screening, launch the eLearning series on Online Assistant page 17315.

Click the Adjust Logic button to edit the logic for your screening items and dynamically update counts based on your changes.

View the number of transactions passing your screen, which automatically updates based on the parameters you specify.

Click the View button to analyze results based on your screen’s criteria.

Select to save the screen, the report results, or the list of identifiers that passed your screen in order to use them in other applications.

Search to view a link directly to any passing results. If a company/transaction doesn’t pass, click the “Why?” link to find which of the parameters were not met.

Search for keywords or filter results based on favorites or recommended items.

Drag parameters from the left pane to add them to your report. Hover over the icon to view the definition. For more information on working with your screen parameters, see Online Assistant page 16697.

Select to "Include undisclosed values" for relevant items.

TIP > After running a screen, you can click a name and then select any of the next step reports to learn more about the company (e.g., Guide, Snapshot).

Also, click on any row and select “Add to Comps” to begin creating your own custom comps list. For more information, see Online Assistant page 16699.

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