

## ***PharmSource Lead Sheet (PLS)*** **Setting Preferences Filters: Instructions**

The Preferences feature allows you to set up filters for your weekly Lead Sheet so you will immediately view only those leads that meet specific criteria you have designated. Use caution when setting filters, as you never want to omit relevant leads. Preferences selections remain active unless you go to the Preferences page to change filters, clear filters, or select the “View Complete Lead Sheet” option to view the current issue without filters.

### **Access to the Preferences page:**

The Preferences page is accessed from the main page of the weekly *PharmSource Lead Sheet*. Just click on the **Preferences** button located in the left navigation bar.

### **Administrative Options:**

After making changes on the Preferences page, you can choose to either view the filtered lead sheet based on the selections you’ve made on this page, or view the week’s complete lead sheet (without filters). Select the appropriate option at the top of the page (these same options also can be selected at the bottom of the Preferences page).

#### **To change the name of your profile:**

To change the profile name, type the new name into the “Name of This Profile” box and then click the green button next to “Update Profile Name.”

### **Selection Logic:**

It’s very important for you to know that the system uses “Boolean And Logic”. Within an individual filter box, the system uses “OR” logic (i.e., if you select *Phase I* and *Phase II* from *Development Phase*, your results will show both Phase I and Phase II results). When you select from multiple filter option tabs, your results will be based on “AND” logic (i.e., if you select *Phase III* and *Tablet* and *Tennessee*, your results will be ONLY for products that meet ALL of the criteria selected).

If no selections are made for one or more tabs, all options in unselected categories will be included in the search.

Not everyone uses (or should use) Preferences filters. If you’re not sure, please consult with a PharmSource representative.

### **The 7 Preferences filter options:**

1. **Development Phase:** This option allows you to target companies by specific *development phases* of their products. **For example**, by selecting *Preclinical* and *Phase I*, you will receive only information on products in those two stages of development; all unselected development phases will be suppressed from your weekly lead sheet.
2. **Nature of API:** This section lets you include only those companies with products having specific Active Pharmaceutical Ingredients (APIs). If API is relevant to your target market, you may select one or more Biologic and/or Chemical (or other) options, homing in on pharmaceutical actives in your area

of interest. When you select one or more APIs, all unselected API categories will be suppressed from your weekly lead sheet.

3. **Dosage Form:** This section lets you include only companies having products with specific dosage forms. If dosage form is relevant to your target market, you may select one or more dosage forms. We suggest that you include the *Unknown* category in your search, so you can review these products to determine their possible relevance (in most cases, an unknown dosage form is found in early phase development before a dosage form has been specified). When you select one or more dosage forms, all unselected dosage forms will be suppressed from your weekly lead sheet.
4. **Therapeutic Area:** This section lets you include only companies having products for specific therapeutic areas. If therapeutic area is relevant to your target market, you may select one or more therapeutic areas. We suggest that you include the *Unknown* category in your search, so you can review these products to determine their possible relevance. When you select one or more therapeutic areas, all other therapeutic areas will be suppressed from your weekly lead sheet.
5. **Geographic Area:**
  - a. **Search By U.S. States/Canadian Provinces or Search By Country:** This section lets you limit data viewed in your weekly lead sheet to include only companies/products/activity in a specific territory you designate. Canadian province options follow the US state options. Filtering by state/province/country is useful if you focus on a specific sales territory. When you select one or more geographic areas, all unselected geographic areas will be suppressed from your weekly lead sheet.
6. **Financing Types:** This section allows you to limit finance-related data included in your weekly lead sheet by financing type. Keep in mind that financing types are not associated with product categories. Selections for this category will be shown under the *Corporate Finance* section on the front of the weekly lead sheet. We suggest that you NOT use this option unless you ONLY wish to view specific financing types. Information on all unselected financing types will be suppressed from your weekly lead sheet.
7. **Companies:** We suggest that you NOT use this option unless you ONLY wish to view weekly reported activity for a specific sub-set of companies. Information on all unselected companies will be suppressed from your weekly lead sheet.

#### **Making/deleting Preferences filter selections:**

1. Under the search selections options is a gold bar entitled **Profile Selections**, with columns below that match the selection options. These columns show any selections you have made.
2. **To make selections:** Go to the **Select your Preferences filters** section. When you select a tab from this section, associated options will appear. Click on the small box to the left of each item you wish to include in your filters, and a check mark will appear. Selected items automatically appear in the **Profile Selections** section below. Note: You may make multiple selections from one or more tabs for a single search (see above re: Search Logic to ensure you have optimized your search).
3. **To delete selected Preferences filters:** Under **Profile Selections**, select the item(s) you wish to delete (they will be highlighted in blue when selected), then click on **Delete Selected** and the item(s) will be deselected.
4. **To clear all Preferences filters:** At the top of the Preferences page under *Administrative Options* is a **Clear ALL** button. Click this when you want to remove all Preferences filters in a single action. You can then make new selections, or opt to have no Preferences filters.

**View results:**

Once you're done selecting, changing or clearing Preferences, select either **VIEW FILTERED LEAD SHEET** or **VIEW COMPLETE LEAD SHEET**, depending on which version of the lead sheet you wish to see. These options are available at the top and bottom of the Preferences page.

**Reminder: If you make Preferences selections, they remain active unless you go to the Preferences page to change or clear filters, or select the VIEW COMPLETE LEAD SHEET option to view the current issue without filters. Using this option does not alter your Preferences selections, it just lets you toggle to a view of the full week's lead sheet report. You can then return to the Preferences page and select VIEW FILTERED LEAD SHEET to see the weekly lead sheet based on your filters. When you open the weekly lead sheet anew, it will always open with the FILTERED lead sheet, if you have set Preferences filters.**

**Questions?**

Contact anyone on the *PharmSource Lead Sheet* team at 703-383-4903 (located in the Eastern time-zone of the USA) or send an e-mail message to [info@pharmsource.com](mailto:info@pharmsource.com). We want to help you get the most out of our service!