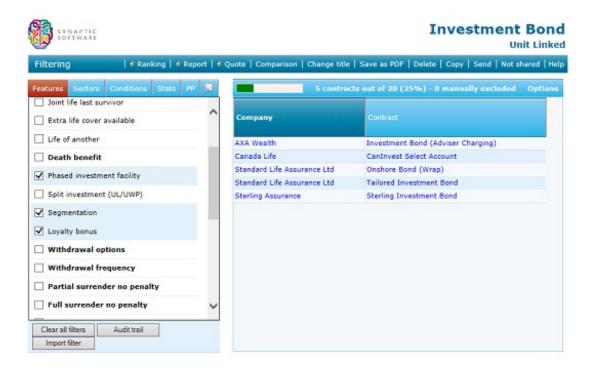# How do I filter the grid of contracts?

Last Modified on 31/05/2017 12:12 pm BST

When you start new research into a product type, the list on the right-hand side of the screen includes all the contracts held in Synaptic's database (unless your firm has asked Synaptic to trim the data down e.g. to implement a multi-tie or panel).

An adviser's first step is usually then to filter out any contracts which do not meet their client's requirements – e.g. contracts which do not offer waiver of premium, or whose financial strength is unacceptably weak. The screenshot below shows an example where contracts have been eliminated if they don't offer all three of a phased investment facility, segmentation, and a loyalty bonus.

The same filtering process can also be used in other research scenarios: panel construction, competitor analysis, journalistic research etc.

Picking the fields to filter on

The list of fields available on a product type is divided up into tabbed groups (plus one extra tab for recording notes about your research). These tabbed categories are explained in detail in the section about Synaptic's data.

The following pages describe how (and why) to filter on each of these categories of field. However, it's worth starting off by reading a few quick tips on the filtering process, this can be found in the following article on our knowledgebase:

- Tips on filtering

The following sections then describe each of the categories of field – you will only see tabs for those categories which are applicable to the type of product you are researching. For example, product types without an investment element do not have a Sectors or PP (past performance) tab.

- Filtering on features
- Filtering on sectors and specific linked funds
- Filtering on policy conditions (Conds tab)
- Filtering on statistics (Stats tab)
- Filtering on past performance (PP tab)

There are also tools you can use to clear your filtering,and import the filtering from previous research:

- Importing filtering from old research
- Removing all your filtering
- How Compliance officers can mandate filtering