

# How do I filter on policy conditions?

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The Policy **Conditions** tab shows conditions such as minimum initial ages, minimum investments, various types of charging etc.

The list of policy conditions can include two types of field: numeric fields, which can be filtered; and textual fields, which can't be filtered.

In the screenshot below, the "Additional bond charges" field is textual (because the variations from contract to contract are too complex to be reduced to a single number). Therefore, unlike the fields above it, there are no boxes next to it for entering a value to filter on.

The screenshot shows a software interface for filtering investment contracts. On the left, there is a 'Filtering' panel with several numeric fields and dropdown menus for comparison operators. The fields include:

- Minimum age at entry (NB) policy holder
- Minimum age at entry (NB) life assured
- Maximum age at entry (NB) policy holder
- Maximum age at entry (NB) life assured
- Minimum initial investment (£)
- Minimum additional investment (£)
- Minimum amount per policy (£)
- Max number policies per bond
- Initial/establishment charge
- Additional bond charges
- Exit charge year 1 (%)
- Exit charge year 2 (%)
- Exit charge year 3 (%)
- Exit charge year 4 (%)
- Exit charge year 5 (%)
- Exit charge year 6 (%)

Below these fields are buttons for 'Clear all filters', 'Audit trail', and 'Import filter'. On the right, a table displays a list of contracts. The table has columns for 'Company', 'Contract', 'Additional bond charges', and 'Exit charge year 4 (%)'. The table shows 20 contracts, with 0 manually excluded. The 'Additional bond charges' column contains various textual descriptions of charges, such as 'None', 'We will take a monthly charge,...', 'Product Charge 0.5% pa deducte...', 'The Annual Management Charge (...)', '0.10% i.e 0.45% pa', 'N/A', '0.75% per annum', '- Possible mortality charge if...', 'An Ongoing Product Charge will appl', '0.50% on the first £25k of FUM...', 'Investment transaction charges...', '0.35% wrapper charge with no s...', 'N/A', and 'None'.

For each field which is numeric you can enter a value, and choose whether to filter on equal to that exact value (=), at least that value (>=), or at most that value (<=).

In the example screenshot contracts are being filtered out if they have a minimum initial investment of more than £100,000.

## Automatic filtering on policy conditions

One of the differences between client-focused and product-focused research is that, in client-focused mode, contracts are automatically removed if they do not match the

client and benefit data you specify. In the above example the system has automatically created the filter on the minimum initial investment as a result of the user specifying a contribution of £100,000 on the client-entry page.

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