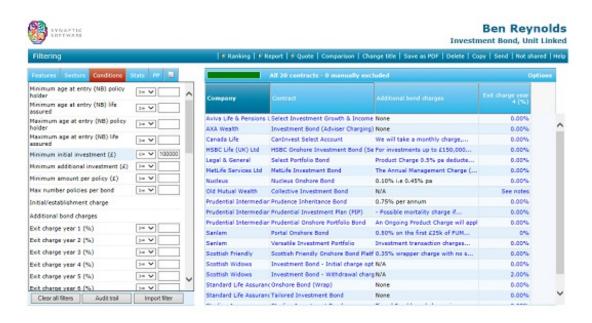
How do I filter on policy conditions?

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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.



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.