## Introduction to filtering

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The Filtering screen is the first stage of every piece of research performed in Synaptic Research. On the right hand side of the screen it will display all the contracts for the type of product being researched. On the left hand side it shows all the fields of data which Synaptic collects about those contracts, divided up into tabbed groups.

The screen shot below shows a list of all Stocks and Shares ISA's and the five tabbed categories which Synaptic collects about ISA's - **Features, Sectors, Conditions, Stats** and **PP**:

CAPITA			Individual Savings Accounts Stocks and Shares
Filtering (using preset criteria)		+ Ranking   + Report   Comparison   Cha	nge title   Save as POF   Delete   Cupy   Send   Nut shared   Help
Features Sectors Conditions Stats PP 1	AE 75 cos	tracts - 0 manually excluded	Ophions
Payment methods	*		
Payment frequency options	Company	Contract	
With Profit (100%)	Aberdeen Azet Nanagement	Aberdeen Investment Trust ISA	
Enhanced death benefit	Aberdeen Asset Management	Aberdeen Hulti-Manager Unit Trust 19A	
Add charges on top of investment	Aberdeen Asset Hanagement	Aberdeen UK OEIC ISA	
	AEGON Retirement Choices	AEGON Stocks & Shares ISA	
No penalty for ceasing monthly payments	A) Sell (Sippoentre)	AJ Sell Supportire Investment ISA	
No penalty for reducing monthly payments	Aliance Trust Savings Limited	ISA - Stocks & Shares Component	
Accepts transfers in	Alianz diabal Investors	Investment Funds 184	
Allows transfers out	Artemia Fund Nanagera	ISA	
Begular withdraval facility	Ascentric	Ascentric Stocks & Shares 18A	
	Availor Investment Services	Preedont 154a	
Dividends taken as income	Asive Investors	Aviva Investors Investment 15A	
All switches free	Avive Wrap UK Ltd	Aviva Ilinap ISA Particka	
Partial switch allowed	AXA Elevate	Elevate Stocks & Shares ISA - Composite	
Phased investment facility	AXA Elevate	Elevate Stocks & Shares 194 - Explicit	
Re-registration option	Capita Financial Managers	Sellie Gifford Investment Trust ISA ISA	
Share exchange facility	Columba Utd	154	
	Ecclesiantical	The Ecclesiantical ISA	
Open architecture	PBC Fund Hanagement Limited	PAC USA	
Partial withdrawal no penalty	a FBC Unit Management Ltd	Foreign & Colonial Investment Trust	
Case al New Automation Insect New	Fidelity Fundstletwork	Fundatietwork	

The main purpose of this screen is to filter out contracts which do not meet the client's requirements, for example - contracts which don't offer essential features, or whose charges are uncompetitive, or which cannot implement the portfolio needed for the client's asset allocation requirements, or whose past performance is poor.

The Filtering screen also allows you to do the following:

- Manually exclude contracts
- Build a spreadsheet-style grid of data and save the gird as a PDF
- View full comparisons of every aspect of selected contracts
- · Generate factsheets for individual contracts or companies
- View the list of linked funds available on a contract and pick the best ones in the sectors you are recommending

- Get the definition of a field (e.g. phased investment facility)
- View notes about the contracts
- Send your research to a colleague e.g. a paraplanner or compliance officer
- Record your own notes about your research e.g. a to-do list
- Move onto rank the filtered contracts into a 'league table' or go straight to generating a report or get a quote
- Delete research when you no longer need it.

For more information on each of these areas, please refer to the relevant articles.