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 INANCIAL SOFTWARE		Individual Savings Accounts Stocks and Shares		
Filtering (using preset criteria)		+ Ranking + Report Comparison Change title Save as POF Delete Copy Send Nut shared Help		
Features Sectors Conditions Stats FP 🔳	All 75 cos	stracts - 0 manually excluded	Options	
Payment methods	^	and the second se		
Payment frequency options	Company	Contract		
uith Profit (100%)	Aberdeen Asser Henetement	Aberdeen Investment Trust ISA		
Enhanced death benefit	Aberdeen Asset Management	Aberdeen Multi-Manager Unit Trust 184		
Add dramas on the of investment	Aberdeen Asset Management	Aberdeen UK 051C 15A		
	AEGON Retirement Choices	AEGON Stocks & Shares ISA		
No penalty for ceasing monthly payments	AJ Sell (Sippcentre)	AJ Sell Supportire Investment ISA		
No penalty for reducing monthly peyments.	Alliance Trust Savings Limited	ISA - Stocks & Shares Component		
Accepts transfers in	Alianz Olabal Investors	Investment Funds 184		
Allows transfers out	Artemis Fund Nanagara	ISA		
Decider withdressed facility	Ascentric	Ascentric Stocks & Shares 18A		
C Regular Humanian activy	Avaion Investment Services	Freedore 154a		
Dividends taken as income	Aviva Investors	Aviva Investors Investment ISA		
All switches free	Avive Wrep UK Ltd	Avive Rires ISA Perticite		
Partial switch allowed	AXA Elevate	Elevate Stocks & Shares ISA - Composite		
Phased investment facility	AXA Elevate	Elevate Stocks & Shares 184 - Explicit		
	Sellie Gifford	Sellie Gifford Investment Trust ISA		
	Capita Financial Hanagers	194		
Share exchange facility	Cofunda Ltd	154		
Open architecture	Ecclesiers cal	The Ecclesiescal ISA		
Partial withdrawal no penalty	PBC Fund Management Limited	PAC ISA		
	M Pac Unit Management Ltd	Foreign & Colonial privatoment Trust		

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.