

How do I filter on Policy Conditions?

Last Modified on 10/01/2024 12:36 pm GMT

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 fields - numeric fields which can be filtered and textual fields which can't be filtered:

The screenshot shows a 'Filtering' window with a tabbed interface. The 'Conditions' tab is active. The window contains a list of conditions, each with a dropdown menu for the filter operator and an input field for the filter value. The conditions are:

Condition	Filter Operator	Filter Value
Maximum age at entry (nb)	>=	
Minimum monthly contribution (£)	>=	
Minimum single contribution (£)	>=	
Minimum single contribution per fund/trust (£)	>=	
Minimum monthly withdrawal (£)	>=	
Minimum annual withdrawal (£)	>=	
Minimum remaining balance (£)	>=	
Minimum transfer value (£)	>=	
Objective of ISA		
Interest rate (cash) %		
Additional charges		
Dealing charge		
Partial withdrawal charge (£)		
Full withdrawal charge (£)		
Exit charge within 1 year	>=	
Exit charge after 1 year	>=	
Exit charge after 2 years	>=	
Exit charge after 3 Years	>=	

At the bottom of the window, there are three buttons: 'Clear all filters', 'Audit trail', and 'Import filter'.

In the screenshot above, fields that are purely textual and cannot be filtered on do not have the boxes to the right to enter a value to filter on. For example, '**Additional charges**' is a textual field because the variations from contract to contract are too complex to be reduced to a single number.

For each field which is numeric you can enter a value and choose whether to filter on '**equal to that exact value**' (=), '**more than or equal to that value**' (>=), or '**less than or equal to that value**' (<=).

Filtering

Features	Sectors	Conditions	Stats	PP	
Minimum monthly contribution (£)		>=			
Minimum single contribution (£)		>=		100	
Minimum single contribution per fund/trust (£)		>=			
Minimum monthly withdrawal (£)		>=			
Minimum annual withdrawal (£)		>=			
Minimum remaining balance (£)		>=			
Minimum transfer value (£)		>=			
Objective of ISA					
Interest rate (cash) %					
Additional charges					
Dealing charge					
Partial withdrawal charge (£)					
Full withdrawal charge (£)					
Exit charge within 1 year		>=			
Exit charge after 1 year		>=			
Exit charge after 2 years		>=			
Exit charge after 3 Years		<=		1	
Exit charge after 4 Years		>=			

In the example above the system would filter out contracts if they don't allow a minimum single contribution of at least £100 and if they have an exit charge after 3 years of more than 1%.

Automatic filtering on policy conditions

One of the differences between 'client focused' and 'product focused' research is that, in client focused, contracts are automatically removed if they do not match the client and benefit data you specify on the client entry screen. If doing 'product focused' there won't be any client or benefit data input, therefore nothing to auto filter on.