



V2 Report Filters — Reference Guide

This guide outlines all available filters across reports in **V2**, organized by report type and field category. It's designed to help you quickly understand what you can filter and where you can find it.



How Filtering Works in V2

- Open the **Filters modal**
- Select a **field**
- The system automatically shows the correct input type:
 - Date picker
 - Dropdown / multiselect
 - Number range
 - Text input
- Apply **one filter per field**
- Active filters appear as **badges in the toolbar**



Filter Behavior Notes

- Each field supports **one filter at a time**
- Filters across fields are combined using **AND logic**
- Boolean values use:
 - 1 = Yes / True
 - 0 = No / False
- Date filters support:
 - Custom ranges
 - Quick selections (e.g., Today, Yesterday)
 - Relative ranges (e.g., last X days, next X days)



Customer Report Filters



Text Fields

- Customer name
- Email
- Username
- UUID
- Social Security Number
- Home phone
- Mobile phone
- ID
- Residence city
- Residence ZIP
- Checking account (last 4)
- Debit card (last 4)
- Routing number



Date Filters

- Created
- Last dialed
- Last logged in
- Last note
- Last email
- Last SMS



Status & Boolean Filters

- Loan statuses:
 - Active, inactive, funded, denied, paid off
 - Pending, settled, sold, withdrawn, written off
- Bankruptcy declared
- Manual credit limit enabled
- Under watch

Communication Permissions

- Can contact via phone
- Can receive marketing email
- Can receive transactional email
- Can receive SMS

Select / Multi-Select Filters

- Loan type
- Latest loan group
- Withdrawal reasons
- Payment frequency
- Student status
- Tags (include / exclude)
- Campaign assignments

Financial Filters

- Monthly income
- Available credit
- Total funded amount
- Loan payments amount
- Manual credit limit (range)
- NSF count (range)

Loan Report Filters

Core Fields

- Loan ID
- Status
- Active flag
- Loan status

Date Filters

Includes all major lifecycle and activity dates:

- Approved, Funded, Denied, Paid off, Created
- Contract signed
- Last bank verification
- Last note
- Last payment attempted
- Maturity
- Next due date
- Next auto-scheduled payment
- Promise date
- Sent to / returned from Paydoff
- Payment plan dates
- Worked date
- Admin / Collector / Reviewer updates
- CSO bought
- Rescinded / Reversed
- Final payment date
- Written off
- Eligible to refinance
- Amortization payment date
- Bankruptcy

Financial Filters

- Accumulated fees / interest
- Amount due / overdue
- APR (range)
- Interest rate (range)
- Contractual amount
- Funded amount (range)
- Current principal balance (range)
- Daily interest
- Final payment amount
- Next payment amount
- Original APR / offer / principal

- Outstanding fees / interest / principal
- Payback percentage (range)
- Payoff amount (range)
- Promise amount
- Purchase price
- Refinance amount / funded
- Settled payments total
- Total fees / interest / principal / paid
- Written-off fees / interest / principal

Delinquency

- Days late (range)
- Days late at payment plan creation (range)

Payment & Account

- ACH preference / status
- Auto-schedule amount
- Bank verification status
- Current payment method
- Debit card preference
- Has active payment method
- Has returned payment
- Auto-scheduled flag
- Last attempted payment (date, status, type)
- Last payment / successful payment (date, amount)
- Last failure reason
- NSF count (range)
- Number of failed / successful / total payments
- Payment frequency
- Payment status
- Revoked payment methods
- Statement preference

Assignment / Staff

- Approver
- Administrator
- Collector
- Reviewer
- (Includes name and last updated date where applicable)

Loan Configuration

- Income type
- Contact method
- Decisioning provider
- Funding process
- Loan creation method
- Loan denial reasons
- Loan group
- Loan type
- Withdrawal reasons
- Origination type
- Lead provider
- Registration source

Status Flags

- Approved
- Eligible for refinance
- Has amortization schedule
- In bankruptcy
- On payment plan
- Pending
- Ready for denial / review
- Rescinded
- Has / does not have promise
- Has / does not have signed contracts
- Sent to Paydoff
- Sold

- Watched / not watched
- Written off
- Worked / not worked

Customer Info (Loan-Level)

- Full address (street, city, state, ZIP)
- Bank account & routing number
- Date of birth
- Employer
- Phone numbers (home, mobile, work)
- Identification details
- Income sources
- Name
- Occupation
- SSN
- Email

Student Fields

- Graduation date
- Has co-borrower
- In-school / out-of-school amounts
- Last contact date
- Last date of attendance
- Reentry date
- Remaining payments
- Start date
- Student status
- Program



Payment Report Filters



Core Payment Fields

- Payment ID
- Amount
- Fees, interest, principal
- Status
- Origin
- Payment type
- Payment number



Date Filters

- Created
- Processed
- Posted
- Failed
- Returned
- Settled
- Loan funded



Adjustments & Admin

- Adjusted by
- Adjustment reason
- Printed at (and by whom)
- Recorded manual payments



Loan Context

- Loan administrator
- Loan group
- Loan type
- Loan status

- Loan tags
- Loan number
- Payment frequency
- Registration source
- Loan check number

Customer Context

- Customer name
- Checking account last 4
- Debit card last 4

Technical Details

- Auth code
- Batch ID
- Payment detail
- Failure description
- Funding check number
- Fund source
- Reference ID
- Return code / description
- Settlement ID

Balances (Before & After Payment)

- Outstanding fees
- Outstanding interest
- Outstanding principal
- Total paid

Processor Info

- Collector name / ID
- Payment processor name

- Payment process group

Student Context

- Fund source
- Last contact date
- Days since last contact
- Student ID / number / status

Flags

- Before bought by CSO
- Is prenote
- Post / pre write-off payment
- Went on payment plan

Communication Report Filters

Date Filters

- Created
- Delivered
- Rejected
- Updated

Status & Permissions

- Read / unread
- Template active / inactive
- Customer contact permissions:
 - Phone
 - SMS
- Marketing permissions:
 - Email

Multi-Select Filters

- Statuses
- Delivery method
- Stream
- Events
- Created by
- Read by
- Groups affected

Text Filters

- Message includes / excludes
- From / to email
- Customer first / last name
- Sender first / last name
- Mobile phone
- Template includes / excludes

Summary

V2 filtering is designed to be:

- **Simpler** — no operator tabs
- **Context-aware** — input type adjusts automatically
- **Faster** — fewer clicks, cleaner UI
- **Consistent** — same filtering experience across all reports