

V2 Filters — Quick Reference Cheat Sheet

How to Apply a Filter

1. Click **Filters**
2. Select a **field**
3. Enter value (auto-matched input)
4. Apply → shows as a **badge**

Core Rules

- **1 filter per field**
- Filters = **AND logic**
- Boolean values:
 - o 1 = Yes / True
 - o 0 = No / False
- Dates support:
 - o Custom range
 - o Quick picks (Today, Yesterday)
 - o Relative (Last X Days, Next X Days)

Most Common Filters by Goal

Find Customers

Goal	Filters
Recently active	Last Logged In → Last X Days
Marketing eligible	Marketing Email = 1, SMS = 1

High risk

NSF Count > X, Under Watch =
1

Find Loans

Goal	Filters
Overdue loans	Days Late > 0, Status = Active
Refinance candidates	Eligible for Refinance = 1
Recent loans	Funded Date → Last X Days
Payment issues	Failed Payments > X OR Returned Payment = 1

Find Payments

Goal	Filters
Failed payments	Status = Failed
Recent transactions	Processed Date → Last X Days
Payment issues	Return Code / Failure Description
Trend analysis	Payment Type, Processor, Frequency

Find Communications

Goal	Filters
Unread messages	Read = 0
Delivery issues	Status = Rejected
Campaign review	Template + Date Range + Read Status

Filter Types (What to Expect)

Field Type	Input Style
Date	Date picker + quick ranges
Number	Min / Max range
Text	Free text (contains, etc.)
Select	Dropdown
Multi-select	Multiple selections
Boolean	1 (Yes) / 0 (No)

Key Fields by Report

Customer

- Name, Email, Phone
- Created / Last Activity
- Loan Status Flags
- Communication Permissions
- Income, Credit, NSF Count

Loan

- Status, Loan Type
- Lifecycle Dates (Created, Funded, Due, etc.)
- Balances, APR, Payoff
- Days Late
- Payment Activity
- Staff Assignment

Payment

- Amount, Status, Type
- Dates (Processed, Failed, Settled)
- Failure Details

- Loan + Customer Context
- Processor Info

Communication

- Created / Delivered Dates
- Read Status
- Delivery Method
- Template / Message Content

Best Practices

- Start with **date filters** first
- Then add **status or numeric filters**
- Keep filters **simple and focused**
- Use **ranges instead of exact values** when possible

Quick Gotchas

-  No multiple filters on the same field
-  No OR logic
-  No true/false → use **1 / 0**

TL;DR

- 👉 Pick a field → enter value → refine with more fields
- 👉 Use **dates + status + numeric filters** for best results
- 👉 Keep it simple—filters stack automatically