

V2 Report Filters — Training Guide

Objective

By the end of this guide, you will be able to:

- Understand how filtering works in V2
- Apply filters across all report types
- Choose the correct filters for common scenarios
- Quickly find and refine data

How Filtering Works in V2

Step-by-Step

1. Open a report
2. Click **Filters**
3. Select a **field**
4. Enter your filter value (input adapts automatically)
5. Apply the filter

 Your filter will appear as a **badge in the toolbar**

Key Concepts to Know

- **One filter per field**
- Filters combine using **AND logic**
- Boolean values:
 - o 1 = Yes / True
 - o 0 = No / False
- Date filters support:
 - o Custom ranges

- o Quick options (Today, Yesterday)
- o Relative ranges (Last X Days, Next X Days)

When to Use Filters

Use filters when you want to:

- Find **specific customers, loans, or payments**
- Narrow down **date ranges**
- Identify **trends or issues** (e.g., late payments, NSF counts)
- Segment users (e.g., marketing eligibility, loan status)
- Audit or investigate activity

Customer Report — How to Use Filters

Common Use Cases

1. Find recently active customers

- Filter:
 - o **Last Logged In → Last 7 days**

2. Identify customers eligible for marketing

- Filters:
 - o **Can receive marketing email = 1**
 - o **Can receive SMS = 1**

3. Find high-risk customers

- Filters:
 - o **NSF count > X**
 - o **Under watch = 1**

Available Filter Categories

Text Fields

- Name, email, username, phone numbers, address details, identifiers

Date Fields

- Created, last activity (login, note, email, SMS, dialed)

Status & Boolean

- Loan statuses, bankruptcy, watch status

Communication Permissions

- Phone, SMS, email permissions

Selections

- Loan type, loan group, tags, campaigns, student status

Financial

- Income, credit, funded amount, NSF count

Loan Report — How to Use Filters

Common Use Cases

1. Find overdue loans

- Filters:
 - Days late > 0
 - Loan status = Active

2. Identify loans eligible for refinance

- Filter:
 - Eligible for refinance = 1

3. Track recent loan activity

- Filters:
 - **Funded date** → **Last 30 days**
 - **OR Created date** → **Custom range**

4. Find loans with payment issues

- Filters:
 - **Number of failed payments** > X
 - **Has returned payment** = 1

Available Filter Categories

Core Fields

- Loan ID, status, active flag

Date Filters

- Full loan lifecycle (created → funded → paid off → written off, etc.)
- Payment activity and admin updates

Financial

- Balances, APR, interest rates, payoff amounts, totals

Delinquency

- Days late, payment plan timing

Payment & Account

- Payment methods, failures, NSF counts, schedules

Assignment

- Staff roles (approver, collector, reviewer, etc.)

Configuration

- Loan type, origination, funding process, provider

Status Flags

- Bankruptcy, refinance eligibility, payment plans, etc.

Customer Info

- Personal, banking, employment details

Student Fields

- Status, attendance, program, loan breakdowns



Payment Report — How to Use Filters



Common Use Cases

1. Find failed payments

- Filter:
 - **Status = Failed**

2. Audit recent transactions

- Filter:
 - **Processed date → Last 7 days**

3. Investigate payment issues

- Filters:
 - **Failure description contains [keyword]**
 - **Return code = [value]**

4. Analyze payment trends

- Filters:
 - **Payment type**

- **Processor**
- **Payment frequency**

Available Filter Categories

Core Payment

- Amount, status, type, number

Dates

- Created, processed, posted, failed, returned, settled

Adjustments

- Adjusted by, reason, manual payments

Loan Context

- Loan details tied to payment

Customer Context

- Customer identity and account details

Technical Details

- Auth codes, batch IDs, return codes

Balances

- Before/after payment breakdowns

Processor Info

- Collector, processor, group

Student Context

- Student-related metadata

Flags

- Prenote, write-off timing, payment plan

Communication Report — How to Use Filters

Common Use Cases

1. Find unread communications

- Filter:
 - **Read = 0**

2. Track delivery issues

- Filters:
 - **Status = Rejected**
 - **Delivery method = SMS/email**

3. Review campaign effectiveness

- Filters:
 - **Template**
 - **Created date range**
 - **Read status**

Available Filter Categories

Dates

- Created, delivered, rejected, updated

Status & Permissions

- Read status, template status, communication permissions

Selections

- Delivery method, events, groups, creators

Text

- Message content, sender/recipient info



Best Practices



Do

- Start broad, then **narrow down filters**
- Use **date filters first** to reduce data size
- Combine filters to refine results
- Use **ranges for financial and numeric fields**



Watch Out For

- Only **one filter per field** (no stacking)
- No OR logic — all filters are **AND-based**
- Boolean values use **1 / 0**, not true/false



Final Takeaways

- Filtering in V2 is **simpler and faster**
- The system **guides you with the right input type**
- You can quickly drill into:
 - o Customers
 - o Loans
 - o Payments
 - o Communications