


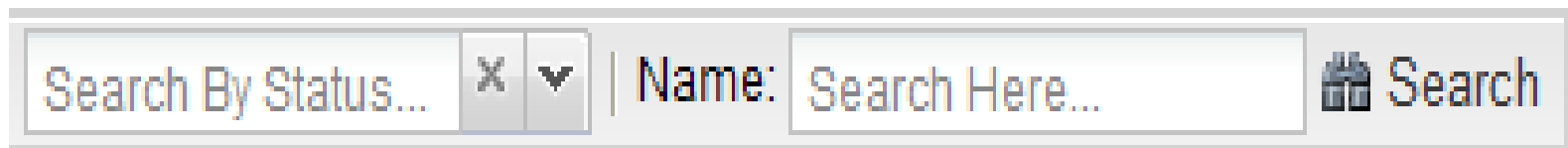
# **HOW TO USE SEARCH and FILTER**

# SEARCH and FILTER

Search By Status...	X	▼		Name:	Search Here...	 Search
---------------------	---	---	--	-------	----------------	--

# SEARCH and FILTER

- Looking for one record in hundreds of records requires time.

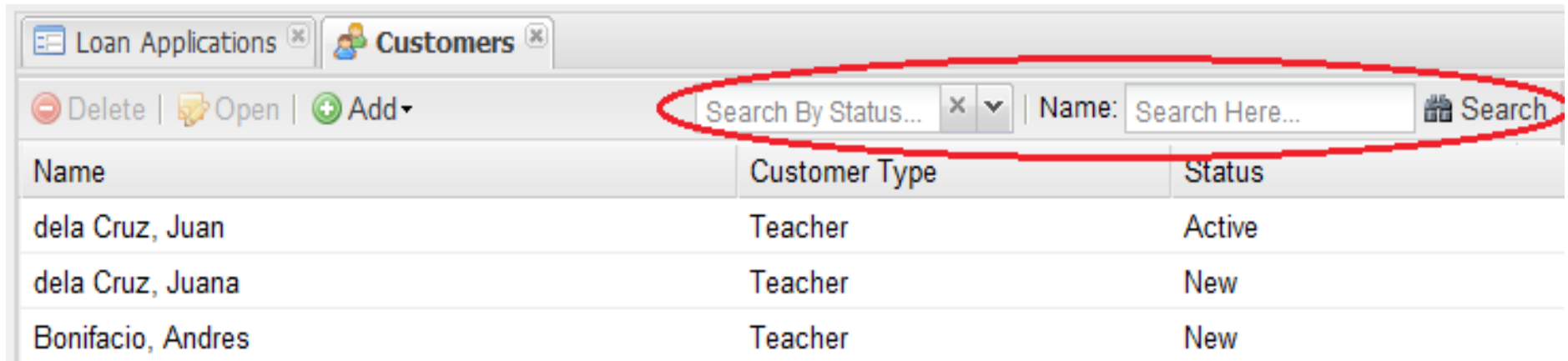


Search By Status... x v | Name: Search Here... Search

- With the Search and Filter feature, you can simply search/filter an identification of the record/s you want to look for.

# SEARCH and FILTER

- Let's take for example the Customer's node..



Name	Customer Type	Status
dela Cruz, Juan	Teacher	Active
dela Cruz, Juana	Teacher	New
Bonifacio, Andres	Teacher	New

**In the Customer's node, a way to search for the customer you want is through their status.**

# SEARCH and FILTER

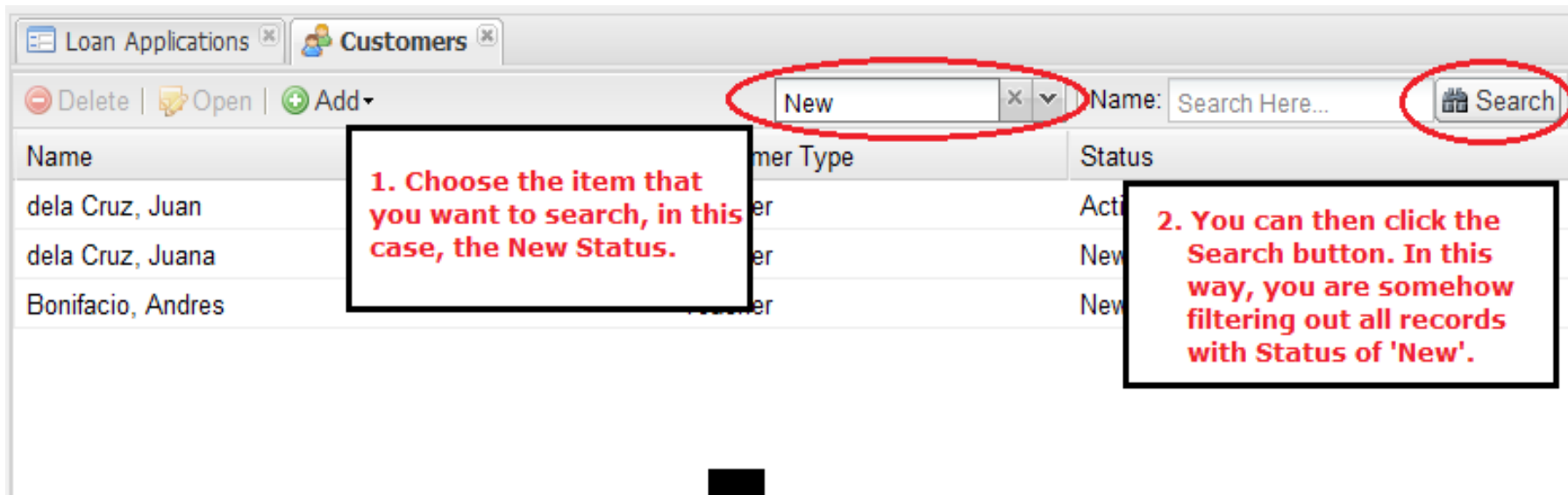
The screenshot shows a software window with two tabs: "Loan Applications" and "Customers". Below the tabs is a toolbar with "Delete", "Open", and "Add" buttons. To the right of the toolbar is a dropdown menu currently showing "New". Further right is a search bar labeled "Name: Search Here..." with a "Search" button. Two red circles highlight the "New" dropdown and the "Search" button. Below the toolbar is a table with columns "Name", "Customer Type", and "Status". The table contains three rows of data. Two callout boxes with red text provide instructions: the first points to the "New" dropdown, and the second points to the "Search" button.

Name	Customer Type	Status
dela Cruz, Juan	er	Acti
dela Cruz, Juana	er	New
Bonifacio, Andres	er	New

**1. Choose the item that you want to search, in this case, the New Status.**

**2. You can then click the Search button. In this way, you are somehow filtering out all records with Status of 'New'.**

# SEARCH and FILTER



Loan Applications Customers

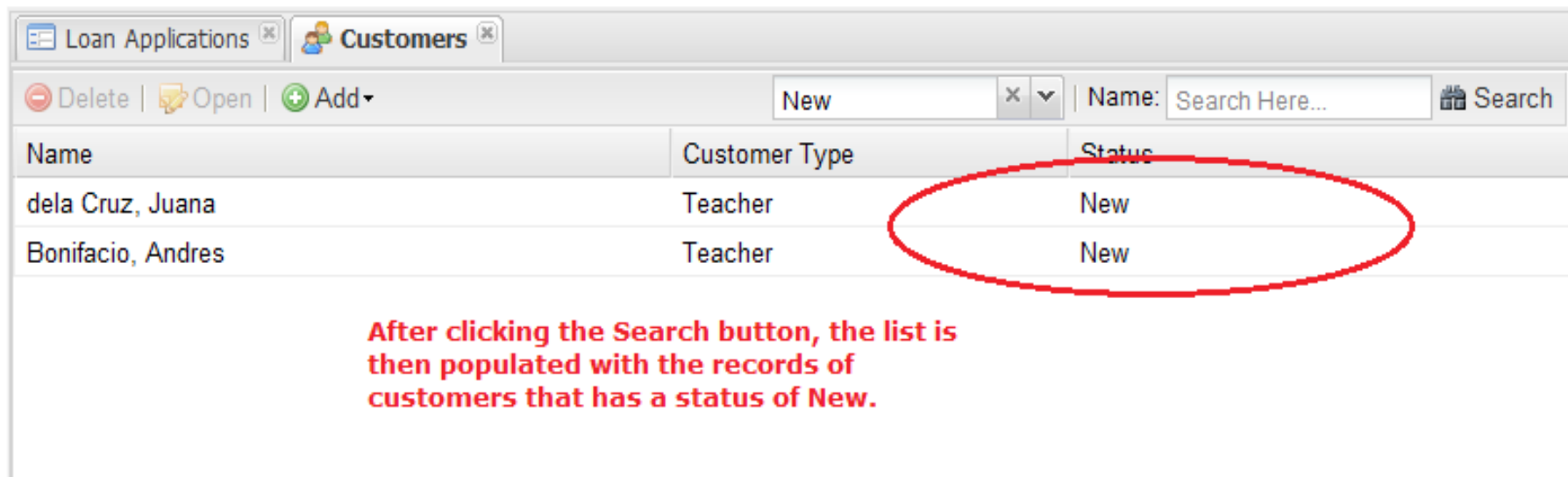
Delete | Open | Add

New x Name: Search Here... Search

Name	Customer Type	Status
dela Cruz, Juan	Teacher	Active
dela Cruz, Juana	Teacher	New
Bonifacio, Andres	Teacher	New

1. Choose the item that you want to search, in this case, the New Status.

2. You can then click the Search button. In this way, you are somehow filtering out all records with Status of 'New'.



Loan Applications Customers

Delete | Open | Add

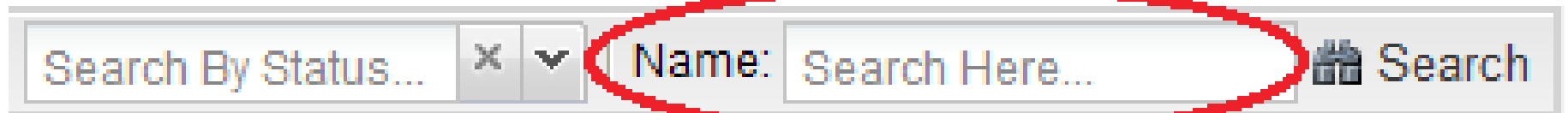
New x Name: Search Here... Search

Name	Customer Type	Status
dela Cruz, Juana	Teacher	New
Bonifacio, Andres	Teacher	New

After clicking the Search button, the list is then populated with the records of customers that has a status of New.

# SEARCH and FILTER

- Another way to search for a record is to use the Search Field



The image shows a horizontal search bar with a light gray background. On the left, there is a text input field containing "Search By Status...". To its right is a small square button with an "X" icon, followed by a dropdown menu with a downward-pointing arrow. The main search area contains the text "Name:" followed by a larger text input field with the placeholder text "Search Here...". This entire "Name:" and input field area is circled with a thick red oval. To the right of the input field is a small icon of a magnifying glass over a document, followed by the text "Search".


# SEARCH and FILTER

Search By Status... <input type="button" value="x"/> <input type="button" value="v"/>		Name: <input type="text" value="Juan"/>	<input type="button" value="Search"/>
	Customer Type	Status	
016	Teacher		
016	Teacher	New	
016	Teacher		

On the search field, enter the name of the customer that you want to search.




# SEARCH and FILTER


Search By Status... x v | Name: Juan  Search

	Customer Type	Status
16	Teacher	Active
016	Teacher	New
016	Teacher	New

**Click the Search button to search for the name you just entered.**



 Customers x

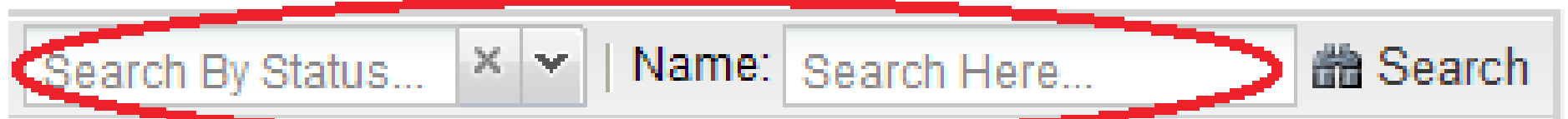
+ Add Search By Status... x v | Name: Juan  Search

	Name	Status
	dela Cruz, Juan	Active
	dela Cruz, Juana	New

**The list is then updated with only the records that contain the text you want to search appears.**

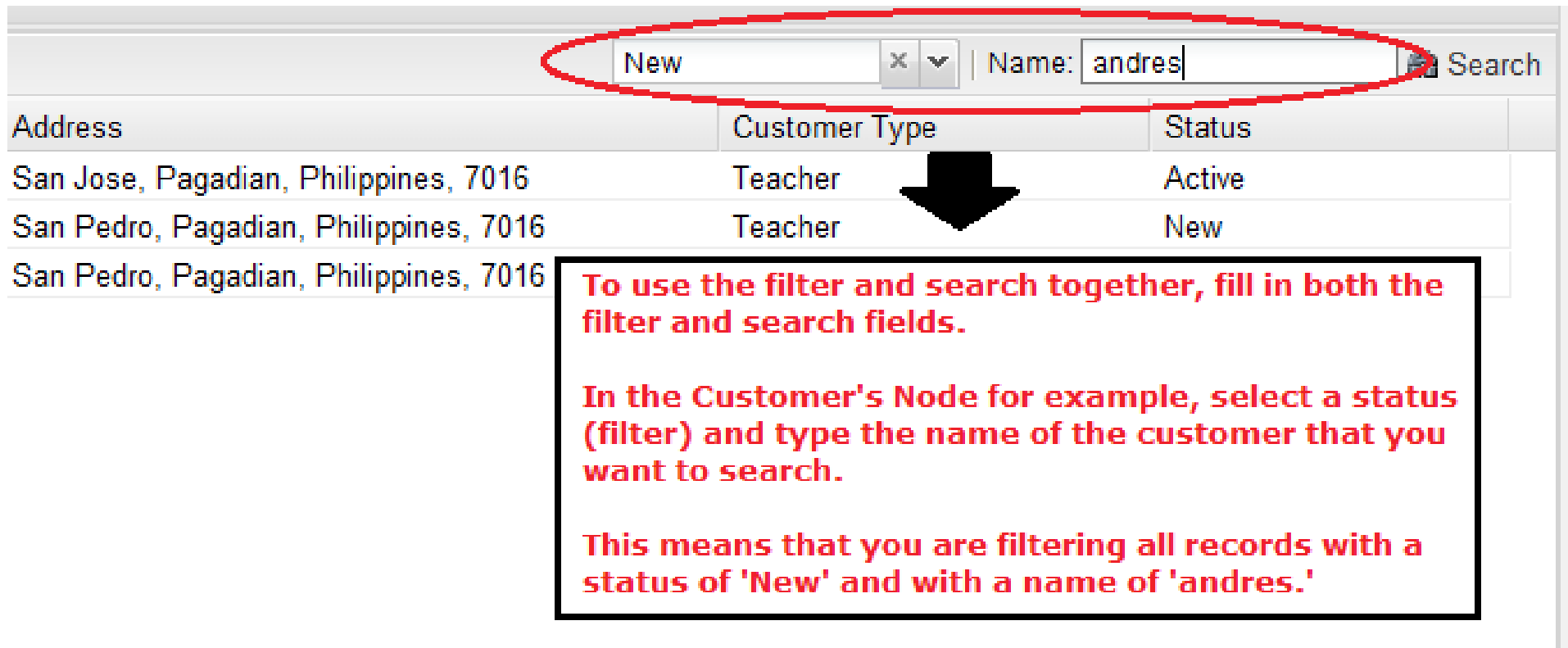
# SEARCH and FILTER

- The last way to look for a record is to use the filter and search together.



The image shows a horizontal search and filter bar. On the left, there is a dropdown menu with the text "Search By Status...". To its right is a small square button with an "x" icon, followed by a small downward-pointing triangle icon. A vertical line separates this from the search section. To the right of the line is the text "Name:" followed by a text input field containing the placeholder text "Search Here...". To the right of the input field is a button with a magnifying glass icon and the text "Search". A red oval is drawn around the "Search By Status..." dropdown, the "x" button, the triangle icon, the "Name:" text, and the "Search Here..." input field.

# SEARCH and FILTER



The screenshot shows a web application interface with a search and filter section. A red oval highlights the filter dropdown (set to 'New') and the search input field (containing 'andres'). A large black arrow points from the filter dropdown to a table below. The table has columns for Address, Customer Type, and Status. The first row shows 'San Jose, Pagadian, Philippines, 7016' with status 'Active'. The second and third rows show 'San Pedro, Pagadian, Philippines, 7016' with status 'New'.

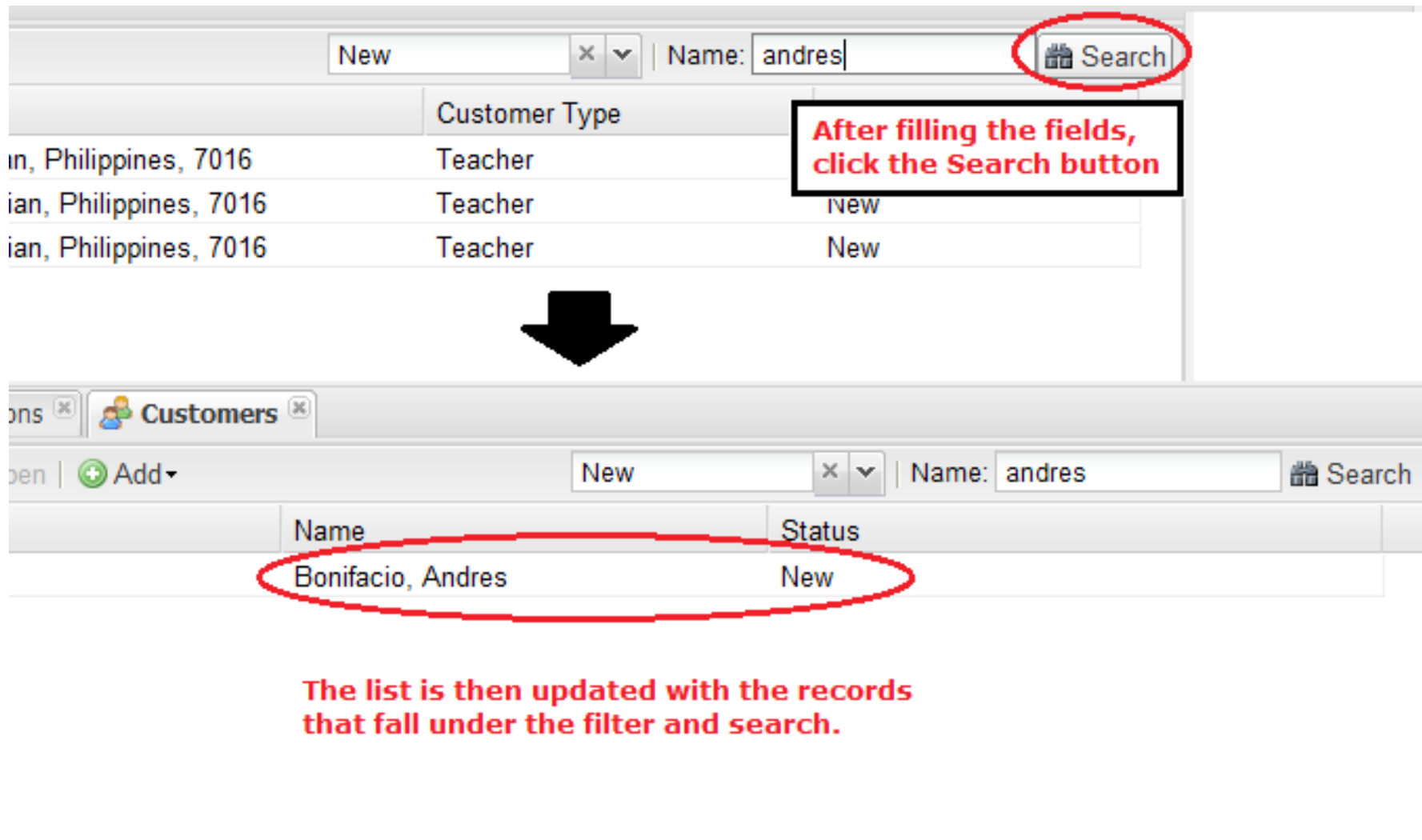
Address	Customer Type	Status
San Jose, Pagadian, Philippines, 7016	Teacher	Active
San Pedro, Pagadian, Philippines, 7016	Teacher	New
San Pedro, Pagadian, Philippines, 7016		

**To use the filter and search together, fill in both the filter and search fields.**

**In the Customer's Node for example, select a status (filter) and type the name of the customer that you want to search.**

**This means that you are filtering all records with a status of 'New' and with a name of 'andres.'**

# SEARCH and FILTER



After filling the fields, click the Search button



The list is then updated with the records that fall under the filter and search.

Name	Status
Bonifacio, Andres	New

# FILTERS

- Another way to filter records is through compound filters.

orm

  Search

Filter By:

Collateral Requirement	Application Date	Status
Secured	11/02/2011	Pending: Approval
Secured	10/28/2011	Closed
Secured	10/28/2011	Closed

# FILTERS


Print Application Form




To: 11/3/2011 Search Filter By: Status

Loan Product	Collateral Requirement	Ap	Status
Salary Loan	Secured	11/3/2011	Pending: Approval
Salary Loan	Secured	10/28/2011	Closed
Salary Loan	Secured	10/28/2011	Closed


**On the first filter, select the item you want.  
In this case, we want to filter the records  
according to its status.**

# FILTERS

Project |  Print Application Form

 To: 11/3/2011  Search Filter By: Status 

Loan Product	Collateral Requirement	Application Date	Status
Salary Loan	Secured	11/02/2011	Pending
Salary Loan	Secured	10/28/2011	Closed
Salary Loan	Secured	10/28/2011	Closed



- Pending: Approval
- Pending: In Funding
- Rejected
- Cancelled
- Closed
- Approved
- Restructured

**The second filter changes according to the selected item in the first filter.**

**In this case, since we selected Status on the first filter, the second filter contains all possible status of the record which can be filtered.**

# FILTERS

[el](#) | [Reject](#) | [Print Application Form](#)

From:

To: 11/3/2011

Search

Filter By: 

Status

Closed

Loan Product	Collateral Requirement	Application Date	Status
Salary Loan	Secured	10/28/2011	Closed
Salary Loan	Secured	10/28/2011	Closed


**After selecting an item in the second filter, the list will AUTOMATICALLY update with the records that fall within the filter.**




Loading Loan Applications..

Displaying loan application 1 - 2 of 2



# FILTERS

Reject |  Print Application Form

 To: 11/3/2011   Search Filter By: Status ▼ Closed ▼

Borrower's Name	Collateral Requirement	Application Date	Status
dela Cruz, Juan	Secured	10/28/2011	Closed
dela Cruz, Juan	Secured	10/28/2011	Closed

# DATE FILTERS

**Loan Applications** [X]

[-] Delete | [O] Open | [+] New | [A] Approve | [-X] Cancel | [R] Reject | [P] Print Application Form

Search By: [ ] Search... From: [ ] To: 11/3/2011 [ ] Search Filter By: [ ]

Loan Application Id	Borrower's Name	Collateral Requirement	Application Date	Status
3	Bonifacio, Andres	Secured	11/3/2011	Pending: Approval
2	dela Cruz, Juan	Secured	10/28/2011	Closed
1	dela Cruz, Juan	Secured	10/28/2011	Closed

**Another way to filter records is through its date.  
There are two fields, the DATE FROM and DATE TO.**

**You are to select a date in both fields. The records are then  
filtered according to the date you entered, that is within the  
range of date.**

Page 1 of 1

# DATE FILTERS

**Loan Applications** [X]

[-] Delete | [O] Open | [+] New | [A] Approve | [-X] Cancel | [R] Reject | [P] Print Application Form

Search By: [v] Search... From: 11/1/2011 [C] To: 11/3/2011 [C] [S] Search Filter By: [v]

Loan Application Id	Borrower's Name	Collateral	Date	Status
3	Bonifacio, Andres	Secured		Pending: Approval
2	dela Cruz, Juan	Secured		Closed
1	dela Cruz, Juan	Secured		Closed

**Select a date.**  
**In this case, select a DATE FROM.**

November 2011

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today

Page 1 of 1

# DATE FILTERS

**Loan Applications** [X]

[-] Delete | [Open] Open | [+] New | [Approve] Approve | [-X] Cancel | [Reject] Reject | [Print] Print Application Form

Search By: [v] Search... From: 11/1/2011 To: 11/30/2011 [Search] Filter By: [v]

Loan Application Id	Borrower's Name	Collateral Requirement	App
3	Bonifacio, Andres	Secured	11/
2	dela Cruz, Juan	Secured	10/
1	dela Cruz, Juan	Secured	10/

Select a DATE TO.

November 2011

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today

Page 1 of 1

# DATE FILTERS

**Loan Applications** [X]

[-] Delete | [O] Open | [+] New | [A] Approve | [-X] Cancel | [R] Reject | [P] Print Application Form

Search By: [v] Search... From: 11/1/2011 [C] To: 11/30/2011 [C] [S] Search Filter By: [v]

Loan Application Id	Borrower's Name	Collateral Requirement	Application Date	Status
3	Bonifacio, Andres	Secured	11/02/2011	Pending: Approval
2	dela Cruz, Juan	Secured	10/28/2011	Used
1	dela Cruz, Juan	Secured	10/28/2011	Closed

After setting the date boundaries, click the Search button to filter the records.

Page 1 of 1

# DATE FILTERS

Loan Applications

Delete

Open

New

Approve

Cancel

Reject

Print Application Form

Search By:

Search...

From:

11/1/2011

To:

11/30/2011

Search

Filter By:

Loan Application Id	Borrower's Name	Collateral Requirement	Application Date	Status
3	Bonifacio, Andres	Secured	11/02/2011	Pending: Approval

The list is the updated with the records that have application dates that fall within the date boundary, in this case, from Nov. 1, 2011 to Nov. 30, 2011

Page 1 of 1