



## **Account Application Update Inquiry**

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**Overview:**

This feature allows a user to view certain “updating” applications that ran for an account within a date range. There are limitations regarding which applications will appear in this inquiry.

**Key Benefits:**

This application will assist financial institutions when researching account conditions, by identifying the applications which have updated an account during a specified time period.

**Processing:**

The Account Application History inquiry screen shows a listing of “updating” applications<sup>1</sup> that have been run for an account during a time period. The user may enter the date range for the inquiry. The user may also limit the inquiry to return the results for just a single application or choose to return the results for all applications. The account number will default from the screen from which the Account Application History inquiry is started.

The Account Application History screen is for inquiry only and will not update the DNA database. The new screen has two sections. The top section allows the user to specify search criteria which are used to refine the results. The bottom section displays the selected information, showing the history of the selected applications which have been run against the selected account in the specified timeframe.

**Note:** Only those applications which update the AcctApplHist table will be shown in this inquiry.

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<sup>1</sup> Qualifying batch applications write an entry into the AcctApplHist table when run in updating mode. For example, the monthly statement application (MM\_STMNT) writes an entry to this table so that the next time it is run, it will include transactions since the last entry (date) in the AcctApplHist table. Not all batch applications require this feature.

## Screens:

The Account Application History screen is shown and explained below.

## Navigation

The Account Application History inquiry screen can be accessed from two locations:

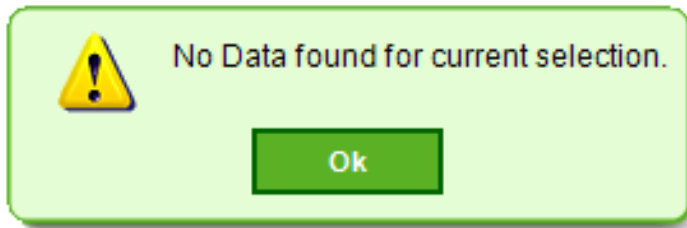
- 1) Services > Relationships > Maintenance > Deposit Accounts > Inquiries > Account Application History
- 2) Services > Relationships > Maintenance > Loan Accounts > Inquiries > Account Application History

## Screen Appearance

The screenshot displays the 'Account Application History' screen. At the top, there is a 'Search Criteria' section with the following fields: 'From Date' (05-13-2010), 'Thru Date' (11-11-2013), 'Account Number' (002001267), and 'Application' (Name). A 'Sort Order' section is also present with 'Ascending' selected. Below the search criteria are 'Query' and 'Clear' buttons. The main area is titled 'Application Details' and contains a table with three columns: 'Application Number', 'Application Description', and 'Effective Date'. The table lists 20 rows of data, including application numbers 357, 358, 360, and 358, with descriptions like 'Maintenance Service Charge', 'Cycle Deposit Interest Credit', and 'Statement Production', and effective dates ranging from 6/20/2010 to 2/2/2011. A 'Close' button is located at the bottom left of the table area.

Application Number	Application Description	Effective Date
357	Maintenance Service Charge	6/20/2010
358	Cycle Deposit Interest Credit	6/20/2010
360	Statement Production	6/20/2010
357	Maintenance Service Charge	9/20/2010
358	Cycle Deposit Interest Credit	9/20/2010
360	Statement Production	9/20/2010
357	Maintenance Service Charge	10/20/2010
358	Cycle Deposit Interest Credit	10/20/2010
360	Statement Production	10/20/2010
357	Maintenance Service Charge	11/19/2010
358	Cycle Deposit Interest Credit	11/19/2010
360	Statement Production	11/19/2010
360	Statement Production	12/17/2010
357	Maintenance Service Charge	12/29/2010
358	Cycle Deposit Interest Credit	12/29/2010
360	Statement Production	12/29/2010
357	Maintenance Service Charge	1/20/2011
358	Cycle Deposit Interest Credit	1/20/2011
360	Statement Production	1/20/2011
358	Cycle Deposit Interest Credit	2/2/2011

This screen will display the following message if there was no data for the account / specified date range / application(s) selected by the user.



**Field Listing:**

Field	Description
<b>Search Criteria</b>	
Account Number	The account number is pre-filled and cannot be edited.
From Date	The starting date used in the inquiry. The value will default to 90 days prior to the current post date. The value must be less than or equal to the "Thru Date"
Thru Date	The ending date used in the inquiry. The value will default to the current post date. The value must be greater than or equal to the "From Date"
Application	This is a dropdown list which displays the Application description of all the applications that have run against the account (from the AcctApplHist table). This is an optional field and will default to 'None'. The applications in this dropdown will be displayed alphabetically.
Sort Option	Radio buttons for displaying the data in either ascending or descending order by date and application number.
Query	Clicking the "Query" button will populate the "Application Details" section of the screen.
Clear	Clicking the "Clear" button will back the initial values on the "Search Criteria" section of the screen, and will clear the "Application Details" section of screen.
<b>Application Details</b>	
Application Number	The "Application Number" is the value used to uniquely identify the application.
Application Description	The "Application Description" is the description of the application.

Field	Description
Effective Date	The "Effective Date" is the date the application was run for the account. This value will be listed in either descending or ascending order based on the sort option selected.
Close	Clicking the "Close" button will close the screen.

**Additional Requirements:**

- Requires DNA 3.0 or higher

**Configuration Checklist:**

NA

**Revisions:**

Date	App Version #	Change
01/2011	1.0.0.0	Application Created
11/2013	1.0.0.1	Re-Packaged and Re-documented for DNA AppStore