



## Documents Quick Access

DocumentsQuickAccess.dnax  
Extension Id: 2ccd19f7-d559-43f1-93b1-11b566b27eb1

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**Overview:**

This App provides quick access to the documents (WMF Forms) associated with an account through the online print page. The menu item “Documents” is added to the Quick Access, Accounts and Credit Card tabs within the Relationship Profile. When an account is selected and the menu item is clicked on, it will take you to the online print page. The account you selected will be the active account in the online print page and all documents associated with that account will appear in the selection box.

**Key Benefits:**

Easier access to documents for accounts in DNA. Currently one has to double click the account, wait for the account maintenance screen to load, go to the maintenance or additional menu item and then choose “online print”. With the new app one just chooses the account by clicking on it and then clicking on the new “Documents” menu item to get to the online print page.

Furthermore, currently there is no way to get to the online print page for credit cards. This app provides access to the online print page for credit card accounts, which will allow documents to prefill with account specific information for the credit card.

**Requirements**

- Employees must have access to the Relationship Profile and Online Print Form Screens.
- Licensing and setup for using DNA WMF Forms through the Online Print Form.
- Version 1.0.0.3 of this app requires DNA 4.3.2 or higher. The original version 1.0.0.0 was for DNA version 4.2.2.0.

**Changed Screen:**

Relationship Profile

**Navigation:**

The **Documents** menu is on four menu bars on three existing tabs within **Relationship Profile**.

Once in a **Relationship Profile**, in the **Accounts** tab, highlight an account and then click on the new **Documents** menu item in the menu bar just above it for either **Deposits** or **Loans / Safe Deposit Box**.

## Relationship Profile

Transaction Express Edit Print Wizards Workflows Contact Management Loan Origination Profitability External Docs More

Member Number  Search Member Group  Refresh

Accounts (259) ID (0) External Loan Apps Agreements Credit Card Pre-Authorized Payroll Distributions

☒ Include All Optional Roles ☐ Include Closed Accounts Deposit Total Owner Balance  Loans Total Owner Balance

**Deposits**

Transfer Passbook Update Statements Inquiries Relationship Team **Documents**

Account Number	R	Account Description	Auth Trans	Current Balance	Collected Balance	Available Balance	Status	Int Rate	Maturity Date
	<input type="checkbox"/>	Regular Share - Re...	Yes	0.00	0.00	(5.00)	Active	0.00000	

Loans / Safe Deposit Box

Transfer Payoff Paydown Print Inquiries **Documents**

Account Number	R	Account Description	Auth Trans	Current Balance	Available Credit	Payment Amount	Int Rate	Disclosed Interest Rate	Due
	<input checked="" type="checkbox"/>	2000 Ford F250 - ...	Yes	0.00		454.92	20.49000		05-21-

In the **Credit Card** tab, highlight a Credit Card Account and click **Documents** in that menu bar.

## Relationship Profile

Transaction Express Edit Wizards Workflows Contact Management Loan Origination Credit Cards Profitability External Docs

Member Number  Search Member Group  Refresh

Accounts (259) ID (0) External Loan Apps Agreements **Credit Card** Pre-Authorized Payroll Distributions

☐ Include Closed Accounts

**Credit Card Accounts**

Inquiries Collateral Preauthorized Transactions **Documents**

CCM Loan Acct Number	Account Product	Status	Current Balance	Credit Limit	Available Balance	Interest Rate	Due Date	Current Pmt Due	Auto Pmt	Lockout Status
	Northwest R...	Active	2,438.77	0.00	(2,438.00)	11.500000	04-05-2017	249.82	<input type="checkbox"/>	

On the **Quick Access** tab, highlight an account and click **Documents** in that menu bar.

Tickler Relationship Profile - TESTACCOUNT, J.

### Relationship Profile

Transaction Express Edit Print Wizards Workflows Contact Management Profitability External Docs

Member Number  Search Member Group  Refresh

Quick Access Accounts ID External Loan Apps Agreements Credit Card Pre-Authorized Payroll D

☐ Include Optional Roles ☐ Include Closed Accounts

**Quick Access**

**Documents**

	Account Number	Account Type	Account Description	External Loan #	Balance	Status	Auth Trn	
+		Savings Regular...			24.96	Active	Y	Rex C. Testaccount
+		Time Deposit 60...			0.00	Originati...	Y	Jim TESTACCOUN

Tickler Relationship Profile - TESTACCOUNT, J.

### Relationship Profile

Transaction Express Edit Print Wizards Workflows Contact Management Profitability External Docs

Member Number  Search Member Group  Refresh

Quick Access Accounts ID External Loan Apps Agreements Credit Card Pre-Authorized Payroll D

☐ Include Optional Roles ☐ Include Closed Accounts

**Quick Access**

**Documents**

	Account Number	Account Type	Account Description	External Loan #	Balance	Status	Auth Trn	
+	5301721876	Savings Regular...			24.96	Active	Y	Rex C. Testaccount
+	5307043215	Time Deposit 60...			0.00	Originati...	Y	Jim TESTACCOUN

The **Documents** menu item provides a shortcut to the **Online Print Form** screen. The **Account Number** field is then populated with the account that was highlighted in the **Relationship Profile** and the normal process followed for this screen.

## Online Print Form

Search Criteria

Account Number »

Print Group » Deposit Account Maintenance

Details

All Selected View Report Print Separate

Description	Name	Copies	Page(s)	Status	Result	Action
Signature Card	NWCCU_MBRSIGCRD	1	1			Print and Archive
Authorization for Automatic Transfers	NWCCU_AUTOPROC	1	1			Print and Archive
Direct Deposit Form	NWCCU_DIRDEPOSIT	1	1			Print and Archive
Remove Joint Deposit Owner Acknowledgem...	NWCCU_REMJOINTOWN	1	1			Print and Archive

Edit

Print Options

Number of Copies

☐ Blank Forms

Action

Apply

Close

**Installation Instructions:**

If you are an in-house client, follow the installation instructions available in the "DNAapps" section of the DNA Help files available on the extranet at DNA In-House.

If you are a data center client, a Compass case is automatically created when you order a trial or paid version of a DNAapp and routed to the Data Center team for installation. Data center DNAapp installation typically takes two weeks; however, the time frame varies depending on the complexity of the app, case load, and the responsiveness of the client and/or third parties. Check the app installation status in Compass or contact your Client Care manager.

**Revisions** *(please include a list of any changes made to this application over time). The information should be high level. Example shown below.*

Date	App Version #	Change
04/13/2017	1.0.0.0	Application created.
10/07/2017	1.0.0.3	Added menu item to Quick Access tab at DNA 4.3.2