# Member 360 View

**Member360.dnax**
**Extension Id: 8198c8cc-2ed5-405f-83d2-204974154fe4**

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**Overview:**
The Member 360 View DNAapp provides a high-level holistic view of member's relationship with the Financial Institution i.e., number the current and past accounts they have, external accounts/services, associated relationships, member's financial situation (credit score, total assets, total loans, etc.), and their level of stickiness/engagement with the Financial Institution (Direct Deposit, etc.).

Following information is visible from the application:
- Employment Details
- Member Details
- Member Relationships
- Everyday Accounts
- Lending Accounts
- Additional Services
- Balances
- Activity Dates
- Profile Notes

The Member 360 View DNAapp supports consumer members (persons) only.

**Key Benefits:**
Member Representatives need to navigate to multiple screens to get the details about a Member and their related accounts.

New screen, 'Member 360 View', helps Financial Institutions to
- Save member representative's time as all the information is available on single screen, hence improves member service.
- Analyze member's relationship with Financial Institutions for further decision making that may include, but not limited to, offer better interest rates on Saving, offer new Loan with lower interest rates etc.

**Processing:**
Member 360 View screen can be accessed through Quick Inquiries → Member 360 View. Once the user has launched the screen, the search screen appears. After a Member is entered correctly, the Member 360 View screen displays the member details in 9 distinct areas of information; Employment Details, Member Details, Member Relationships, Everyday Accounts, Lending Accounts, Additional Services, Balances, Activity Dates, Profile Notes.

Employment Details:
This section displays the employer name and their association with the employer; Employer Name, Employed Since, Affiliation and Designation. These details are determined using the Person Fields.
Employed Since, Affiliation and Designation can be updated from this screen.

Member Details:
This section displays the basic information about the member; Member Name, Relationship of member with Financial Institution (if any), Member Group, Date of Birth and Member Since date.

Member Relationship:
This section displays the relationship of Member with other persons and organizations. This includes

- Personal relationship (as displayed on Member Relationship screen in DNA)
- Association with an Organization (based on Person's Role on Organization)
- Other members sponsored by the Member
- Other member who sponsored this Member

Everyday Accounts:
This section displays the list of different type of Deposit Accounts and number of Active and Closed accounts that the member owns. This also indicate if a Member has the Direct Deposit setup on the account.

Lending Accounts:
This section displays the listing of different type of Loan Accounts and number of Active and Closed accounts that the member owns.

Additional Services:
This section displays detail about Member's Credit Score with as of date and indicator if Member is Tax Reported Owner on any Business account. Financial Institutions can setup additional information to be displayed under this section.

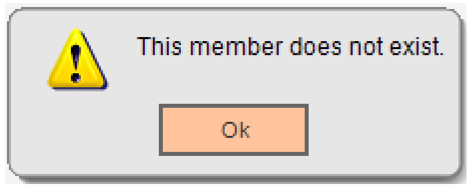
Balances and Activity Dates:
There are two sections on the screen, which displays the financial situation of the Member; which includes Highest Aggregate Deposit Balance, Average Monthly Balance (last 3 months), Average Direct Deposit (last 3 months), Total Loan Payments Last Month, Loan Payments Past Due.

These sections also display the dates of various account level activities; which includes Date of Last ATM Withdrawal, Date of Last POS Transaction, Date of Last Check Cleared, Date of Last Direct Deposit, Date of Last Share Branch Deposit and Date of Last Bill Payment Cleared.

Profile Notes:
This section enables users to add a note related to Member. It also displays when the note was last updated and by whom.

A member can be searched by clicking the 'Search' button, which launces the Search screen in DNA. User can only search for a Person from the search screen.

User can also populate the Member's details by entering the Member Number. If user enters an invalid Member Number or Member Number does not belong to a consumer member (person), then a warning message, 'This member does not exist.', is displayed.



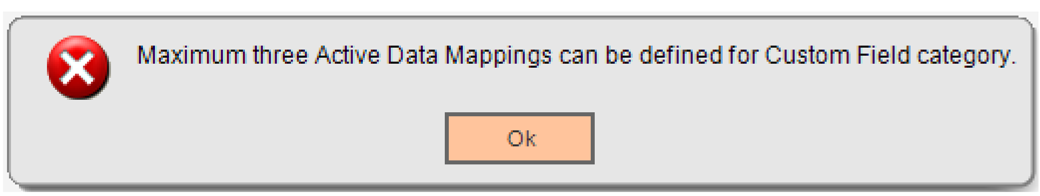

**Define a Custom Data Mapping:**
This DNAapp also provides the capabilities to display additional details on the Member 360 View screen.

A new screen, 'Member 360 Data Mapping' is available through System > Institution > Member 360 Data Mapping, which allows Financial Institutions to define the Data Mapping for additional fields they wish to display on the 'Member 360 View' screen.

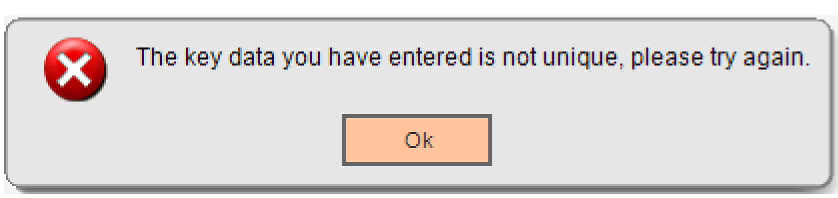
The Data Mappings can be defined for two categories, Additional Service and Custom Field. The data mappings defined for 'Additional Services' category, are listed under the 'Additional Services' section on the 'Member 360 View' screen.

The data mappings defined for 'Custom Field' category, are displayed along with the Balances and Activity Dates area, under the 'Date of Last Bill Pay Cleared' field. There cannot be more than 3 active data mappings under this category.

If user tries to add the fourth Active data mapping for 'Custom Field', then an error message, 'Maximum three Active Data Mappings can be defined for Custom Field category', is displayed to the user.




An error message, 'The key data you have entered is not unique, please try again', is displayed on click of Process button, if a record already exists with the same Data Mapping Code



The data field can be mapped either from the Extension table or from the Person User Field.

Map Data from Extension Table:
A new table, 'PersM360DataMap', has been created to store the data from External sources for the Member.

| Column | Format(Size) | Default Value | Comment |
|---|---|---|---|
| PERSNBR | NUMBER(22) | | The Person Number identifies the Person for which data mapping value is defined. |
| DATAMAPCD | VARCHAR2(4) | | The Data Mapping Code uniquely identifies the data mapping. |
| EFFDATE | DATE | | The Effective Date is the date since when this data mapping value is effective. |
| DATAMAPVALUE | VARCHAR2(60) | | The Data Mapping Value is the value of the data mapping for the Person.<br>This value is displayed on the Member 360 View screen. |
| INACTIVEDATE | DATE | | The Inactive Date is the date when this data mapping value is inactive. |
| DATELASTMAINT | DATE | SYSDATE | Records the date and time when this record was most recently updated or modified. |

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If Financial Institution wish to display any data on 'Member 360 View' screen, which is not available in DNA Database, for ex. 'Date of Last Online Banking Login', they can define the data mapping from Extension table. The Data Map code in the extension table should be same as the Data Mapping Code.

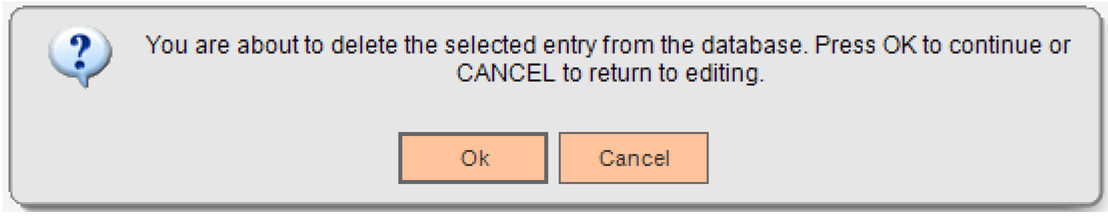
Financial Institution should load the data into this table, based on the Person Number.

Map Data from Person User Field:
If Financial Institution wish to display any data which is available in the person user fields, then they can define the data mapping from Person User Field.

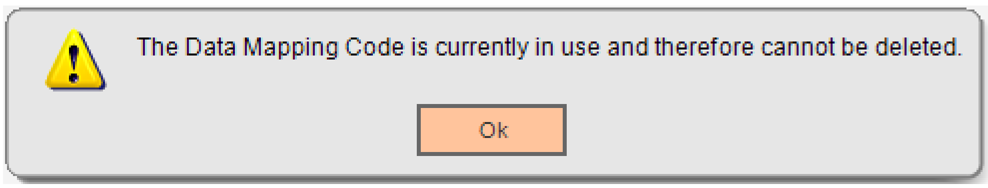
On selecting this option, the dropdown under this option, gets enabled and pre-populated with the available user fields at Person level. The user field value is displayed on the 'Member 360 View' screen.

If Financial Institution wants to discontinue displaying a custom data mapping on the 'Member 360 View' screen, they can either Inactivate the mapping (by unchecking the 'Active' checkbox) or Delete the record.

A confirmation message, 'You are about to delete the selected entry from the database. Press OK to continue or CANCEL to return to editing', is displayed to the user.




If the selected Data Mapping is currently in use and have a data mapping defined in PersM360DataMap table, then a warning message, ‘The Data Mapping Code is currently in use and therefore cannot be deleted.’




**Identifying the Direct Deposit Transactions:**
In DNA, the Direct Deposits are posted as ACH Credit (XDEP) transactions. There is no mechanism to determine a Direct Deposit transaction from any other ACH deposit

This DNAapp determines the Direct Deposit based on the Transaction External Description. While calculating the ‘Average Direct Deposit’ and ‘Date of Last Direct Deposit’, this application filters the ACH Credit (XDEP) transactions based on the certain keywords in the transaction external description.

A new table, ‘M360DirDepIdentifiers’, has been created to store the keywords to determine the Direct Deposit transactions.

| Column | Format(Size) | Default Value | Comment |
|---|---|---|---|
| IDENTIFIERNBR | NUMBER(22) | | The Identifier Number uniquely identifies the record. |
| IDENTIFIERTEXT | VARCHAR2(4) | | The Identifier Text is the keyword to identify the Direct Deposit transaction. |
| ACTIVEYN | CHAR(1) | Y | The Active YN determine if this Identifier is active. Y=Active, N=Inactive |
| DATELASTMAINT | DATE | SYSDATE | Records the date and time when this record was most recently updated or modified. |

Financial Institution needs to maintain the data in this table. If no record is available in this table, then all the ACH Credit (XDEP) transactions are considered as Direct Deposit.

**External Interface Cross References:**
A new external interface cross reference is added to map the Products(Major/Minor) with the Everyday Accounts, Lending Accounts and Business Deposit Accounts.

If the mapping is defined, then the data on ‘Everyday Accounts’ and ‘Lending Accounts’ grids is displayed based on the defined mapping.

| External Interface Category | External Interface Category Code | External Interface | External Interface Code |
|---|---|---|---|
| Member 360 View | M360 | Member 360 View | M360 |

**External Interface Variables:**

| External Interface Variable | Code | Description (how used) | From Value | To Value |
|---|---|---|---|---|
| Business Deposit Accounts | M3BA | Defines the Product(Mj/Mi) mapping to identify the Business Deposit Accounts | Major/ Minor | Business Deposit Accounts |
| Everyday Accounts | M3EA | Defines the Product(Mj/Mi) mapping to identify the Everyday Accounts | Major/ Minor | Account Type.<br>This is displayed as the ‘Account Type’ column in Everyday Accounts grid on the ‘Member 360 View’ screen. |
| Lending Accounts | M3LA | Defines the Product(Mj/Mi) mapping to identify the Lending Accounts | Major/ Minor | Account Type.<br>This is displayed as the ‘Account Type’ column in Lending Accounts grid on the ‘Member 360 View’ screen. |

For Example:

| External Interface | External Interface Variable | From Value (Major/Minor) | To Value |
|---|---|---|---|
| M360 | M3EA | Checking / Basic Checking | Checking |
| M360 | M3EA | Checking / E Checking | Checking |
| M360 | M3EA | Savings / Regular Share | Shares |
| M360 | M3EA | Retirement / IRA | IRA Plans |
| M360 | M3EA | Time Deposit / 1 Year Certificate | Share Certificate |
| M360 | M3EA | Time Deposit / 3 Year Certificate | Share Certificate |
| M360 | M3EA | Savings / Money Market 1 | Money Market |
| M360 | M3EA | Savings / Money Market 2 | Money Market |
| M360 | M3EA | Savings / Money Market 3 | Money Market |
| M360 | M3LA | Consumer Loan / Auto Loan | Auto |
| M360 | M3LA | Consumer Loan / Used Auto | Auto |
| M360 | M3LA | Mortgage Loan / 10 Years Fixed | Mortgage |
| M360 | M3LA | Mortgage Loan / 15 Years Fixed | Mortgage |
| M360 | M3LA | Mortgage Loan / 25 Years Fixed | Mortgage |
| M360 | M3LA | Commercial Loan / Term Loan | Commercial Loan |

| External Interface | External Interface Variable | From Value (Major/Minor) | To Value |
|---|---|---|---|
| M360 | M3LA | Commercial Loan / Credit Line | Commercial Loan |
| M360 | M3BA | Externally Serviced / VISA | Credit Card |
| M360 | M3BA | Saving / Business | Business Deposit Account |

**Variables:**

Calculation Categories:
A calculation category is added to associate variables.

| Calculation Category Code | Description |
|---|---|
| M360 | Member 360 View |

Calculation Types:
A calculation type is added to associate variables.

| Calculation Type Code | Calculation Category Code | Description | MjMiYN |
|---|---|---|---|
| M360 | M360 | Member 360 View | N |

Following Institution level variables are added as described below.

| Variable | Code | Description (how used) | Data Type | Default |
|---|---|---|---|---|
| Account Optional Roles | M3OR | This variable defines the comma separated Account Roles those are considered as Optional roles.<br>While populating the Member's details on 'Member 360 View' screen, only the accounts on which the Member is Tax Reported Owner, are considered.<br>An option, 'Include Accounts with Optional Roles', is available on the screen. When user selects this option, the accounts on which Member has any of the roles as defined in this variable, are also considered. | STR | <BLANK> |
| Pers Roles for Org Relation | M3PR | This variable defines the comma separated Person Roles those are used to determine the relationship of the Member with the Organization.<br>The Organizations on which the Member has any roles, as defined in this variable, are displayed under the Member Relationship grid on the 'Member 360 View' screen. | STR | <BLANK> |

| Variable | Code | Description (how used) | Data Type | Default |
|---|---|---|---|---|
| UserFieldCd for Employer | M3EM | This variable defines the Person User Field Code that is used to determine the Employer of Member. | STR | <BLANK> |
| UserFieldCd for Employed Since | M3ES | This variable defines the Person User Field Code that is used to determine the Employed Since date. | STR | <BLANK> |
| UserFieldCd for Affiliation | M3EA | This variable defines the Person User Field Code that is used to determine the Affiliation of member with the Employer. | STR | <BLANK> |
| UserFieldCd for Designation | M3ED | This variable defines the Person User Field Code that is used to determine the Designation of member. | STR | <BLANK> |
| UserFieldCd for Relationship | M3RE | This variable defines the Person User Field Code that is used to determine the Relationship of Member with the Financial Institution. | STR | <BLANK> |
| UserFieldCd for Member Since | M3MS | This variable defines the Person User Field code to determine the Member Since date.<br>If this is blank, then the Member Since Date as displayed on the Banner is displayed on the 'Member 360 View' screen. | STR | <BLANK> |
| UserFieldCd for Sponsor | M3SP | This variable defines the Person User Field to determine the Sponsor for the person.<br>The value for the user field should be the member number, who sponsored the person.<br>This is used to determine the Member's relationship with other members. | STR | <BLANK> |
| UserFieldCd for Direct Deposit | M3DD | This variable defines the Account Level User Field which determines if the Account is getting Direct Deposits.<br>This is used to identify the Direct Deposit accounts, while fetching the data for Everyday Accounts. | STR | <BLANK> |
| Bill Payment Rtxn Identifiers | M3BP | This variable defines the comma separated list of identifiers to distinguish the Bill Payment transactions from other transactions, based on the Transaction External Description.<br>If left blank, all the transactions with transaction types associated with 'BPAY' Transaction Reporting group are considered as Bill Payment transactions. | STR | <BLANK> |

**Authorization:**
Following Authorization Items need to be assigned to appropriate users, to grant the access to the screens.

| Authorization Item | Code | Description |
|---|---|---|
| Member 360 View | M360 | This authorization item provides the access on "Member 360 View" screen. |
| Member 360 Setup | M3ST | This authorization item provides the access on "Member 360 Data Mapping" screen. |
| CAPR 7722 | 7722 | This authorization item provides the access to CORE API to save the Profile Notes on "Member 360 View" screen. |

**Transaction Reporting Group:**
Following Transaction Reporting Groups are created and used by this application.

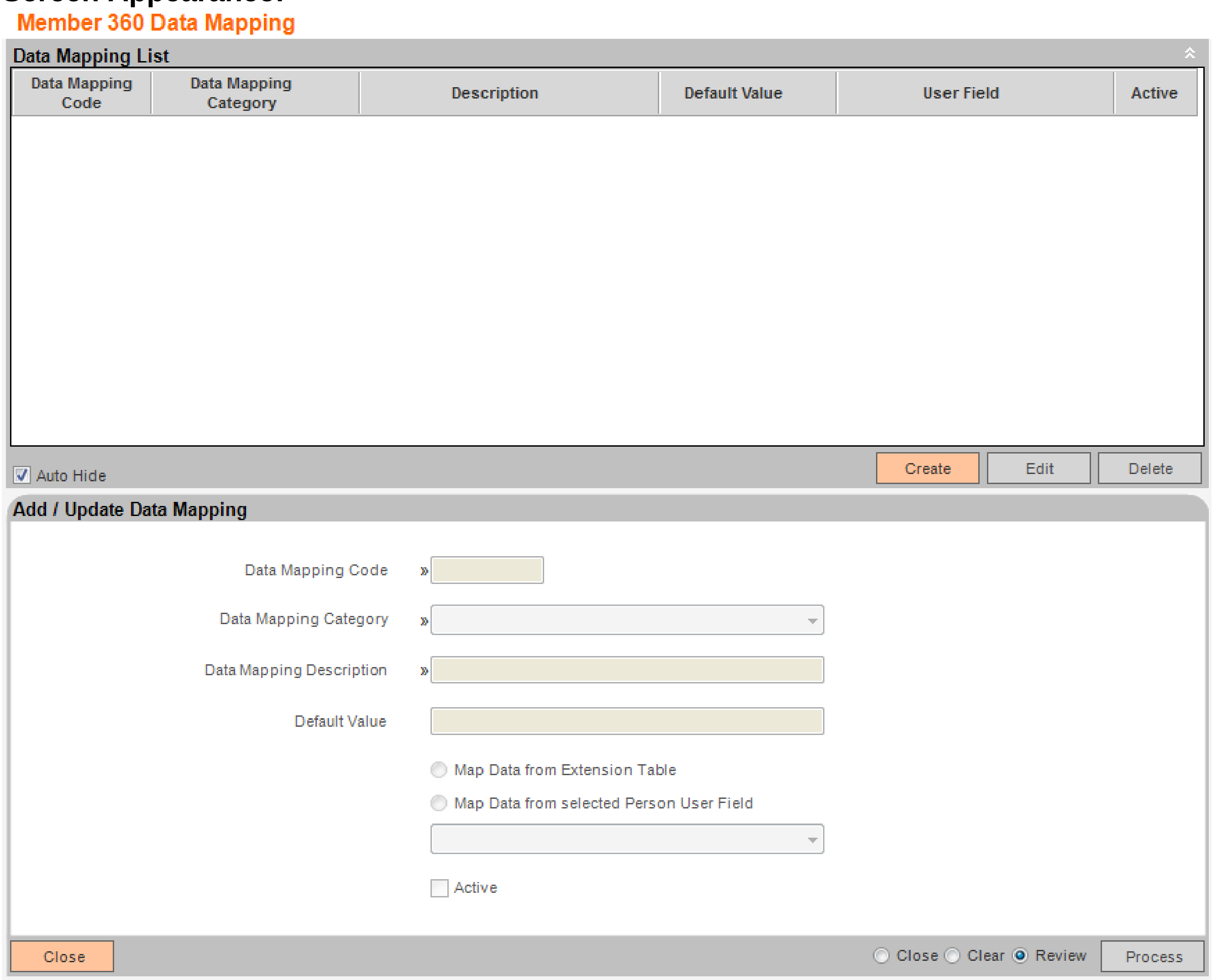
| Transaction Reporting Group | Code | Description (how used) | Default Mapping |
|---|---|---|---|
| Member 360 ATM Transactions | M3AT | The transaction types mapped with this Transaction Reporting Group are considered while calculating the "Date of Last ATM Withdrawal". | DWTH, DWTF |
| Member 360 POS Transactions | M3PO | The transaction types mapped with this Transaction Reporting Group are considered while calculating the "Date of Last POS Transaction". | PWTH |
| Member 360 Check Cleared | M3CC | The transaction types mapped with this Transaction Reporting Group are considered while calculating the "Date of Last Check Cleared". | CWTH, ECHK |

**Screens:**

**Member 360 Data Mapping:**
A new screen is added under the System > Institution menu, which enables Financial Institution to update the data mapping for the configurable fields those are displayed on the "Member 360 View" screen.

**Navigation:**
System > Institution > Member 360 Data Mapping

## Screen Appearance:




## Field Listing:

| Field | Description |
|---|---|
| **Data Mapping List**<br>This grid lists all the Data Mapping defined by Financial Institutions. | |
| Data Mapping Code | Displays Code for each data mapping, as determined by the Financial Institution. |
| Data Mapping Category | Displays the Data Mapping Category under which the data mapping is defined. |

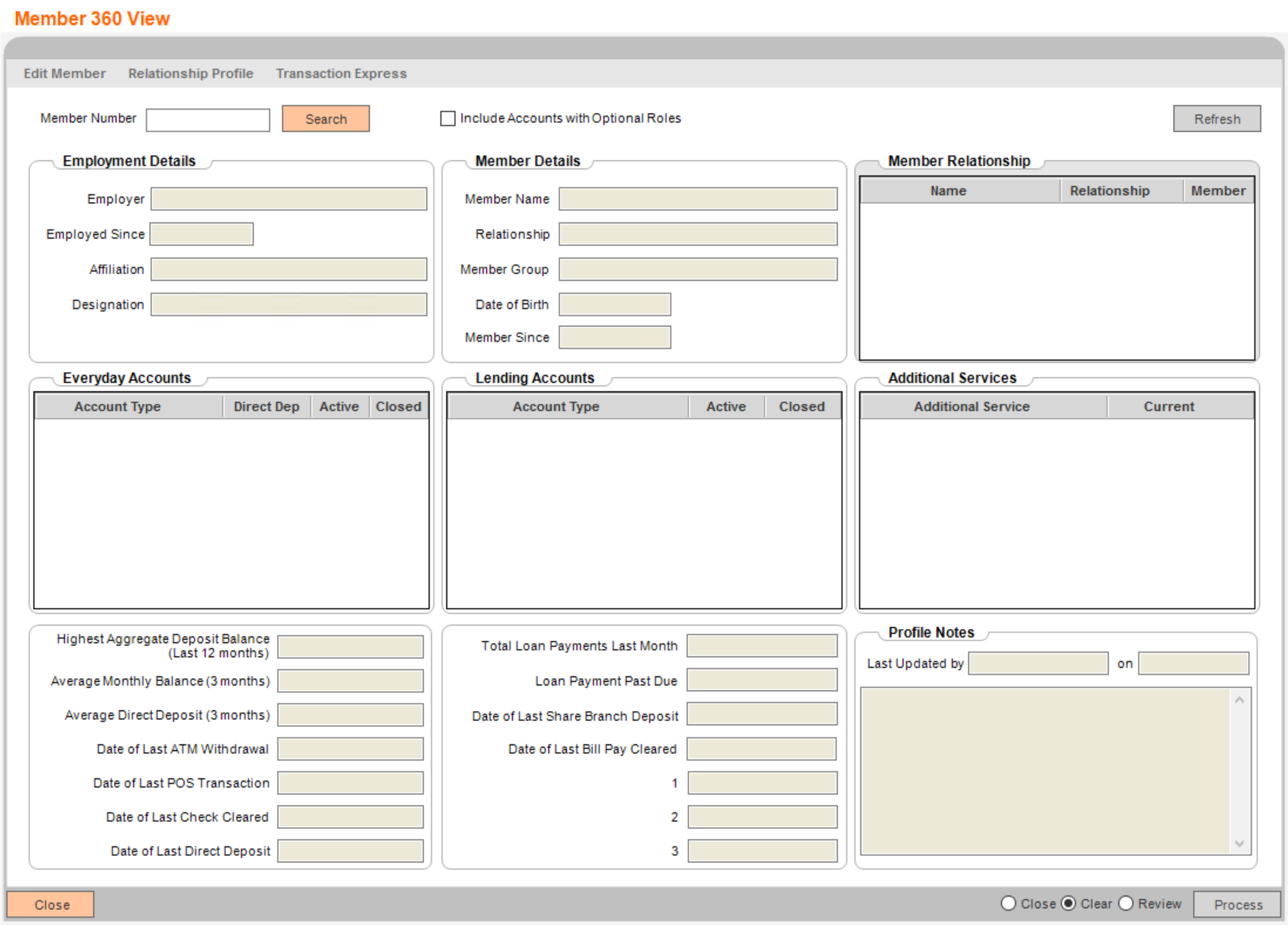
| Field | Description |
|---|---|
| Description | Displays the Description for each data mapping as determined by the Financial Institution. |
| Default Value | Displays the Default Value for the data mapping. |
| User Field | If data mapping is mapped with the Person User Field, then the user field description is displayed.<br>This is blank if the data is mapped from the Extension Table. |
| Active | Determines if the data mapping is Active.<br>Only the active data mapping are displayed on the “Member 360 View” screen. |
| Create Button | Allows the user to create a new Data Mapping.<br>Once this has been selected, the detail group box gets enabled and the label “Add / Update Data Mapping” changes to “Add Data Mapping”. |
| Edit Button | Allows the user to edit the selected Data Mapping.<br>Once this has been selected, the detail group box gets enabled and the label “Add / Update Data Mapping” changes to “Update Data Mapping”.<br>The detail fields are populated with the current values. |
| Delete Button | Allows the user to delete the selected Data Mapping.<br>A confirmation message, ‘You are about to delete the selected entry from the database. Press OK to continue or CANCEL to return to editing.’, is displayed to the user, before deleting the record.<br>A message, ‘The Data Mapping Code is currently in use and therefore cannot be deleted’, is displayed if user tries to delete a record which have a mapping defined in PersM360DataMap table. |
| **Add / Update Data Mapping**<br>This area provides the capabilities to Create or Update the details of Data Mapping. | |
| Data Mapping Code | Allows the user to enter a new data mapping code up to 4 characters long.<br>This is a required field and is disabled in Edit mode. |
| Data Mapping Category | This is a dropdown pre-populated with the available data mapping categories which allows user to select a data mapping category under which the new data mapping is created.<br>The data mappings defined under ‘Additional Services’ category, are listed under the ‘Additional Services’ section on the ‘Member 360 View’ screen.<br>The data mappings defined under ‘Custom Field’ category, are displayed under the ‘Date of Last Bill Pay Cleared’ field. There cannot be more than 3 active data mappings under this category.<br>This is a required field and is disabled in Edit mode. |

| Field | Description |
|---|---|
| Data Mapping Description | Description of the data mapping that is displayed on the 'Member 360 View' screen.<br>The data mappings defined under 'Additional Services' category, this is displayed in the 'Additional Services' section under the 'Additional Service' column.<br>The data mappings defined under 'Custom Field' category, this is displayed as the label on the left side of the text box.<br>This is a required field. |
| Default Value | This is the default value of data mapping.<br>If no value is available for the data mapping, then the default value is displayed on the 'Member 360 View' screen. |
| Map Data from Extension Table | If Financial Institution wish to display any data which is not available in DNA Database, for ex. Date of Last Online Banking Login, they can define the data mapping from Extension table. The Data Map code in the extension table should be same as the Data Mapping Code.<br>This option is selected by default. |
| Map Data from Person User Field | If Financial Institution wish to display any data which is available in the person user fields, then they can define the data mapping from Person User Field.<br>On selecting this option, the dropdown under this option, gets enabled and pre-populated with the available user fields at Person level.<br>If selected, then the dropdown value is required. |
| Active | This checkbox enables users to mark the Data Mapping as Active/Inactive. If this checkbox is checked, then the data mapping is considered as Active and displayed on the 'Member 360 View' screen. |
| Process Button | On click of this button, the record gets saved to the DNA Database.<br>If there are 3 active data mapping exists under the category 'Custom Field' and saving this record will make the active custom field data mapping count as 4, then an error message, "Maximum three Active Data Mappings can be defined for Custom Field category", is displayed and user is not able to save the record.<br>An error message, 'The key data you have entered is not unique, please try again', is displayed to the user if a record already exists with the same Data Mapping Code.<br><br>This button is displayed for users who have been given update permission on this screen. |
| Cancel | This button is displayed in the bottom left corner of the screen's Processing bar when edits have been made but have not been processed.<br>Clicking this button will display a warning asking if you want to discard the changes or continue editing. |
| Close | Clicking this button in the bottom left corner of the screen's Processing bar will close the application. |

**Member 360 View Screen:**
A new screen is added under the Relationships > Quick Inquiries menu, which provides a high-level holistic view of member's relationship with the Financial Institution.

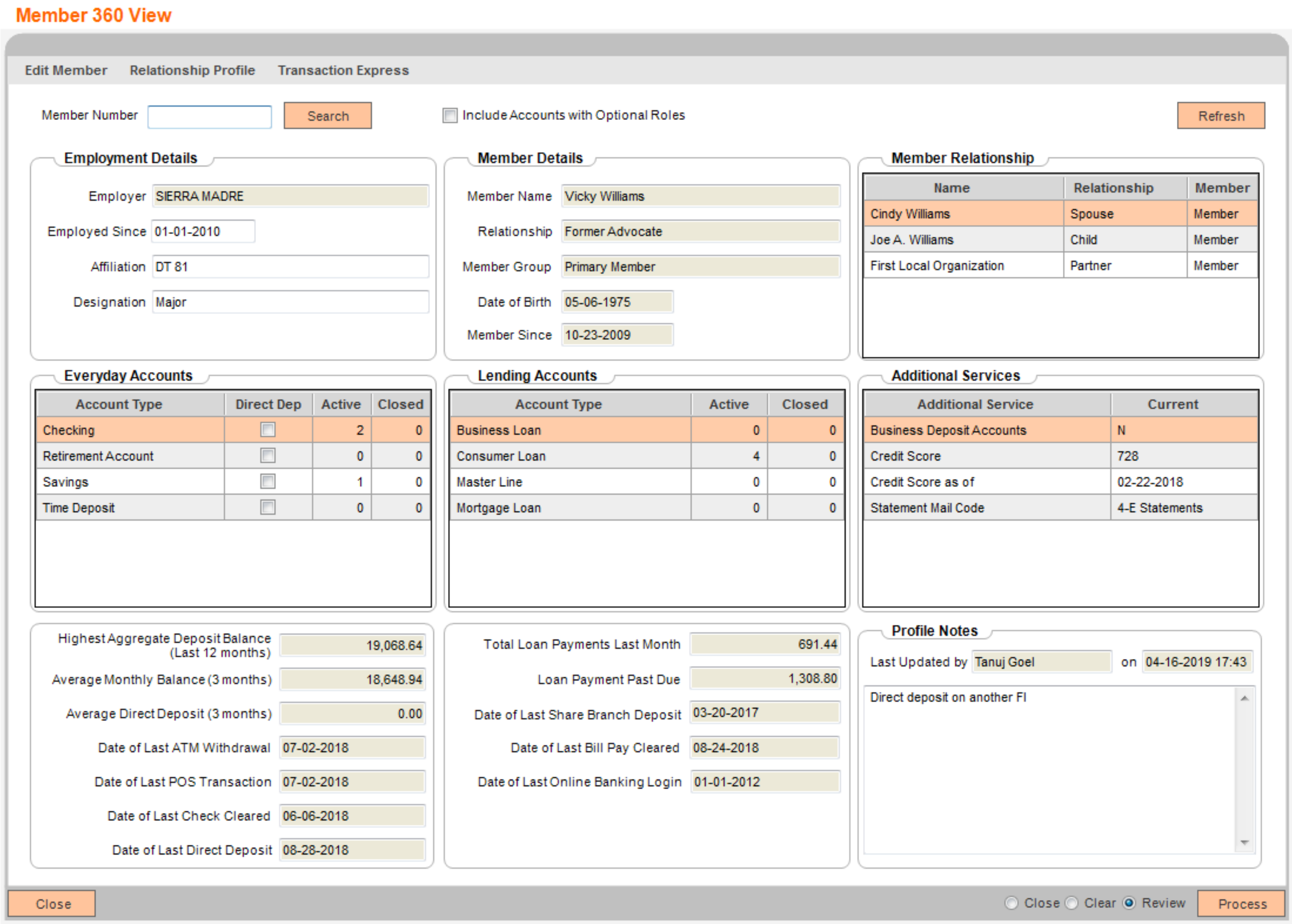
**Navigation:**
Relationships > Quick Inquiries > Member 360 View

### Screen Appearance:




### Screen Appearance (with Data):

Note: This screen appearance has data with one custom Data Mapping defined for 'Additional Service' and 'Custom Field' each.




## Field Listing:

| Field | Description |
|---|---|
| | **Menu Items** |
| Edit Member | Navigates to the Person Maintenance screen for the selected member.<br>This menu is enabled once a member is selected. |
| Relationship Profile | Navigates to the Relationship Profile screen for the selected member.<br>This menu is enabled once a member is selected. |
| Transaction Express | Navigates to the Transaction Express screen.<br>This menu is enabled once a member is selected. |
| | **Search Criteria** |
| Member Number | This displays the Member Number. User can enter a member number to populate the data for the Member.<br>An error message, ‘Member does not exist.’, is displayed If the user enters an invalid Member Number or Member Number does not belong to a consumer member (person). |

| Field | Description |
|---|---|
| Search Button | On click, this button opens the Search screen. User can only search for a Person. |
| Include Accounts with Optional Roles | This check box provides an option to populate the Member data including the accounts on which they have additional roles.<br>The Optional Roles are defined in the Institution level calculation variable, “Account Optional Roles”. |
| Refresh Button | On click, the button refreshes the Member’s details displayed on the screen. |
| **Employment Details**<br>This section displays the employment details of member and their association with the employer. These details are fetched from the Person User Field. | |
| Employer | Displays the name of the Employer for the Member.<br>This is the Value of User Field Code defined in the calculation variable, ‘UserFieldCd for Employer’. |
| Employed Since | Displays the date since when the Member is employed with the employer.<br>This is the Value of User Field Code defined in the calculation variable, ‘UserFieldCd for Employed Since’.<br>This is an editable field. |
| Affiliation | Displays the Affiliation of Member with the employer.<br>This is the Value of User Field Code defined in the calculation variable, ‘UserFieldCd for Affiliation’.<br>This is an editable field. |
| Designation | Displays the Designation that the Member holds with the employer.<br>This is the Value of User Field Code defined in the calculation variable, ‘UserFieldCd for Designation’.<br>This is an editable field. |
| **Member Details**<br>This section displays the member details, like Name, their relationship with Financial Institution, Member Group, Date of Birth and since when they are member with Financial Institution. | |
| Member Name | Displays the Name of the member. |
| Relationship | Displays the relationship of member with the Financial Institution.<br>This is the Value of User Field Code defined in the calculation variable, ‘UserFieldCd for Relationship’. |
| Member Group | Displays the Member Group for the Member. |
| Date of Birth | Displays the Date of Birth for the Member |

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Member Since</td><td>Displays the Member Since date of the Member.<br>This is the Value of User Field Code defined in the calculation variable, ‘UserFieldCd for Member Since’.<br>If the User Field code is not defined in the calculation variable, or the user field value is not defined, then the Member Since date as displayed on the banner, is displayed in this field.</td></tr>
<tr><td colspan="2">Member Relationships<br>This section displays the relationship of the Member with other Person and Organizations.<br>The member’s relationship is determined based on the following criterion…<ul><li>Personal relationship – The relationship defined under the Member Relationship’ screen in DNA.</li><li>Association with an Organization – If the Member has a specified Role on the Organization. These Roles are defined as comma separated value in the calculation variable, ‘Pers Role for Org Relation’.</li><li>Other members sponsored by the Member – The Sponsor member is identified based on the User Field Code defined in the calculation variable, ‘UserFieldCd for Sponsor’. The value of the User Field must hold the Member Number of the sponsor.</li><li>Other member who sponsored this Member</li></ul>This grid displays the Name of related person/organization, Relationship of the Member with them and an indicator if the related person/organization is a Member with Financial Institution.<br>On double click on a record in grid, the Relationship Profile gets launched for the selected Person/Organization.</td></tr>
<tr><td>Name</td><td>Name of the related Person/Organization</td></tr>
<tr><td>Relationship</td><td>Relationship with the Member.<br>The value is displayed based on the Member relationship criterion:<ul><li>Personal relationship – Relationship as defined</li><li>Association with an Organization – The description of Role that Member holds with the Organization.</li><li>Other members sponsored by the Member – The Member Group of the Sponsored Members</li><li>Other member who sponsored this Member – ‘Sponsor’ is displayed</li></ul></td></tr>
<tr><td>Member</td><td>Indicates if the related Person/Organization is a Member.<br>If the Person/Organization is a member, then ‘Member’ is displayed, otherwise ‘Non-Member’ is displayed.</td></tr>
</table>

| Field | Description |
|---|---|
| **Everyday Accounts** | |
| This section displays the listing of different Deposit Accounts with number of Active and Closed accounts on which the Member is Tax Reported Owner.<br>If the check box 'Include Accounts with Optional Roles' is checked then the accounts on which Member have additional roles, are also counted.<br>The Optional Roles are defined in the Institution level calculation variable, "Account Optional Roles" as comma separated value.<br>This grid displays the Account Type, Active (count of active accounts) and Closed (count of closed accounts). | |
| Account Type | Displays the Account Type.<br>By default, the accounts are grouped based on the Major Account Type under Deposit and Retirement categories.<br>The Major Account Type is displayed in this column.<br>Financial Institution may setup the Account Type mapping under the External Interface Cross Reference for 'Everyday Accounts' for the External Interface, 'Member 360 View'.<br>If a mapping is defined for 'Everyday Accounts', then the data is displayed based on these mappings only and 'To Value', as defined in cross reference, is displayed in this column. |
| Direct Dep | Indicates if there is any account under the Account Type, which has a Direct Deposit setup.<br>The Direct Deposit accounts are identified based on the Account Level User Field which is setup in calculation variable, 'UserFieldCd for Direct Deposit'.<br>If the User Field value is set as 'Y' or 'Yes', the account is considered as Direct Deposit account. |
| Active | Displays number of Active accounts under the account type.<br>The account with statues, Approved, Active, Inactive and Dormant, are considered as Active accounts. |
| Closed | Displays number of Closed accounts under the account type.<br>The account with statues, Closed and Charge-off, are considered as Closed accounts. |
| **Lending Accounts** | |
| This section displays the listing of different Loan Accounts with number of Active and Closed accounts on which the Member is Tax Reported Owner.<br>If the check box 'Include Accounts with Optional Roles' is checked then the accounts on which Member have additional roles, are also counted.<br>The Optional Roles are defined in the Institution level calculation variable, "Account Optional Roles" as comma separated value.<br>This grid displays the Account Type, Active (count of active accounts) and Closed (count of closed accounts). | |

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Account Type</td><td>Displays the Account Type.<br>By default, the accounts are grouped based on the Major Account Type under Loan category.<br>The Major Account Type is displayed in this column.<br>Financial Institution may setup the Account Type mapping under the External Interface Cross Reference for ‘Lending Accounts’ for the External Interface, ‘Member 360 View’.<br>If a mapping is defined for ‘Lending Accounts’, then the data is displayed based on these mappings only and ‘To Value’, as defined in cross reference, is displayed in this column.</td></tr>
<tr><td>Active</td><td>Displays number of Active accounts under the account type.<br>The account with statues, Active, Inactive, Non-Accrual and Approved, are considered as Active accounts.</td></tr>
<tr><td>Closed</td><td>Displays number of Closed accounts under the account type.<br>The account with statues, Closed, Closed with Balances Remaining and Charge-off, are considered as Closed accounts.</td></tr>
<tr><td colspan="2">Additional Services<br>This section displays the Additional details about the Member.<br>By default, the following details are displayed in the grid:<ul><li>Business Deposit Accounts – Indicates if the Member is a Tax Reported Owner on at least one Business Deposit Account. These accounts are identified based on the External Cross Reference setup for Products under External Interface ‘Business Deposit Accounts’.</li><li>Credit Score – Latest Credit Score for Member as available in DNA</li><li>Credit Score as of – Credit Score date</li></ul>The Data Mappings defined under the ‘Additional Service’ category, are also displayed in this grid.</td></tr>
<tr><td>Additional Service</td><td>Displays the description for Additional Service</td></tr>
<tr><td>Current</td><td>Displays the current value</td></tr>
<tr><td colspan="2">Balances and Activity Dates<br>The Balances and various Activity Dates on the Member’s accounts are displayed in 2 sections.<br>If the check box ‘Include Accounts with Optional Roles’ is checked then the accounts on which Member have additional roles, are also considered.<br>The Optional Roles are defined in the Institution level calculation variable, “Account Optional Roles” as comma separated value.</td></tr>
<tr><td>Highest Aggregate Deposit Balance (Last 12 months)</td><td>Displays the highest aggregate balance for all the Member’s accounts at the end of the day, during last 12 months.</td></tr>
<tr><td>Average Monthly Balance (3 months)</td><td>Displays the sum of Average Monthly Balance for all the Member’s accounts for last 3 months (rolling period).</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Average Direct Deposit (3 months)</td><td>Displays the sum of Average Direct Deposit per month, for all the Member’s accounts for last 3 months (rolling period).</td></tr>
<tr><td>Date of Last ATM Withdrawal</td><td>Displays the date of last ATM Withdrawal.<br>All the Transaction Types mapped with Transaction Reporting Group, ‘Member 360 ATM Transactions’ are considered.</td></tr>
<tr><td>Date of Last POS Transaction</td><td>Displays the date of last POS Transaction.<br>All the Transaction Types mapped with Transaction Reporting Group, ‘Member 360 POS Transactions’ are considered.</td></tr>
<tr><td>Date of Last Check Cleared</td><td>Displays the date of last Check cleared.<br>All the Transaction Types mapped with Transaction Reporting Group, ‘Member 360 Check Cleared’ are considered.</td></tr>
<tr><td>Date of Last Direct Deposit</td><td>Displays the date of last Direct Deposit transaction.</td></tr>
<tr><td>Total Loan Payments Last Month</td><td>Displays the total Loan payment made during the last calendar month.</td></tr>
<tr><td>Loan Payment Past Due</td><td>Displays the total Loan payment past due.</td></tr>
<tr><td>Date of Last Shared Branch Deposit</td><td>Displays the date of last deposit made via Shared Branch.</td></tr>
<tr><td>Date of Last Bill Pay Cleared</td><td>Displays the date of last Bill Payment cleared.<br>All the Transaction Types mapped with existing Transaction Reporting Group, ‘Bill Payment Rtxns’ are considered.<br>Bill Payment transactions are filtered based on the certain keyword in Transaction External Description. These keywords are defined in the calculation variable, ‘Bill Payment Rtxn Identifiers’.</td></tr>
<tr><td colspan="2">Custom Fields<br>The Member 360 Data Mappings defined under the ‘Custom Field’ category, are displayed under the ‘Date of Last Bill Pay Cleared’ field. Up to 3 custom fields can be displayed on the screen.<br>The Data Mapping Description is displayed as the label for the custom field and the value is displayed in the text box.</td></tr>
<tr><td colspan="2">Profile Notes<br>This area displays the Profile Note related to Member. This also enables user to add or update the note.</td></tr>
<tr><td>Last Updated by</td><td>Displays the Name of the user who last updated the notes.</td></tr>
<tr><td>On</td><td>Displays the date and time when the note was last updated.</td></tr>
<tr><td>Profile Note</td><td>Displays the latest Profile Note.<br>This is an editable field. User can add or update the note.</td></tr>
<tr><td colspan="2">Buttons</td></tr>
</table>

| Field | Description |
|---|---|
| Process Button | On click of this button, the updates get saved to the DNA Database.<br>This button is displayed for users who have been given update permission to the application. |
| Cancel | This button is displayed in the bottom left corner of the screen's Processing bar when edits have been made but have not been processed.<br>Clicking this button will display a warning asking if you want to discard the changes or continue editing. |
| Close | Clicking this button in the bottom left corner of the screen's Processing bar will close the application. |

**Additional Requirements:**

- Fiserv DNA 4.4.1 or higher
- .NET Framework 4.5.2
- Core API Service 2.1.1 or higher

**Configuration Checklist:**

| Item | Test Environment | Production Environment |
|---|---|---|
| Variables | | |
| Authorizations | | |
| Transaction Reporting Group | | |
| External Cross Reference | | |

**Revisions:**

| Date | App Version # | Change |
|---|---|---|
| 03/2019 | 1.0.0.0 | Application Created |