Quick Loan View

Dnax Name: LoanQuickLook.dnax
Application ID: d5b1fe11-ec7d-4c9c-8cd2-8a5622ce3510

Overview:

The Quick Loan View DNAapp is a slide out tab on the relationship profile screen that brings common loan information to the forefront for quicker member communication. It alleviates some of the screen digging that is needed to get frequently requested information from the member, like collateral, the simple insurance type of an account and custom user fields. All a person needs to do is highlight a loan on the Quick Access, or Accounts tab, then hover over the slide out.

Key Benefits:

The slide out tab gives quick access to loan information that might otherwise be several clicks deep to find. This makes common data for loans more accessible and easier to find for quickly answering members questions on collateral, or if they have insurance products associated with their account. It also includes the ability to configure which account or collateral user fields you may want to see alongside the other static information available.

What data do I get?

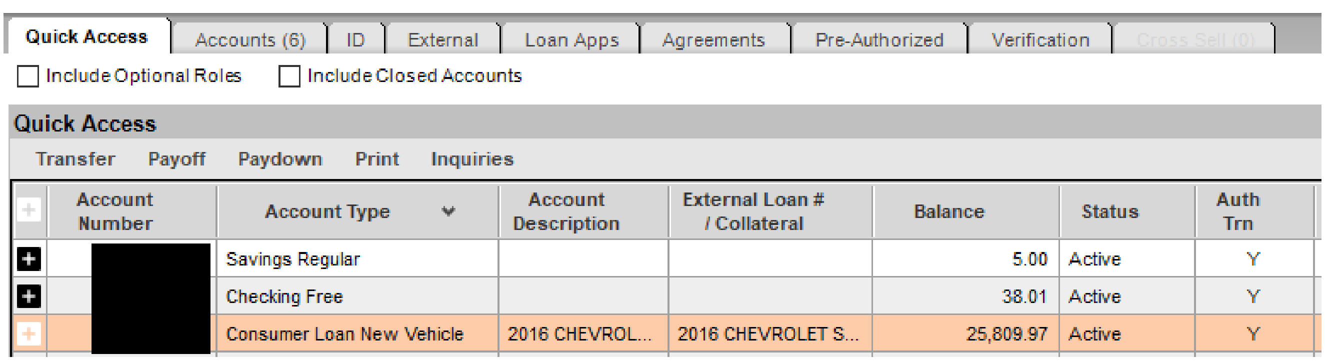
- Current Term(in months) and Remaining Payments.
- Simple Insurance product associated with the loan if there is one
- Collateral information, if a loan has multiple pieces there is a pager to scroll through each collateral piece on the loan.
- Loans with a Collateral ID Number(like a VIN number) can use a copy paste button so you can paste it into other locations for any lookups needed.
- Any account or collateral user fields you want. These are configurable as is the order they display in.

Navigation:

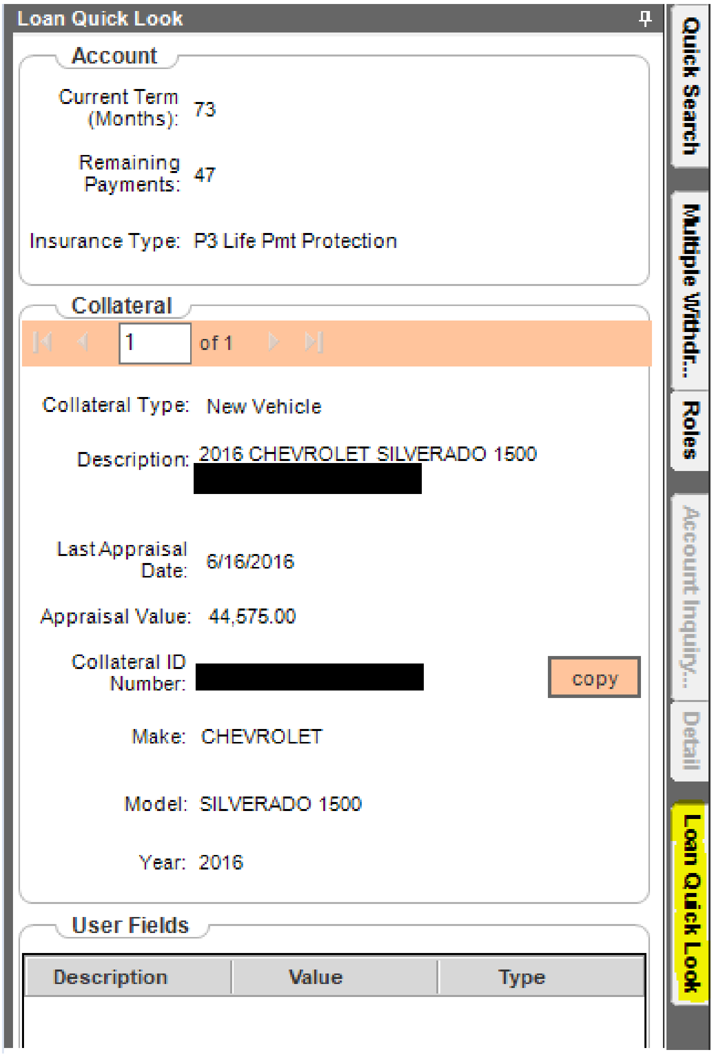
Relationship Module:

Search for a member relationship profile to pull up.

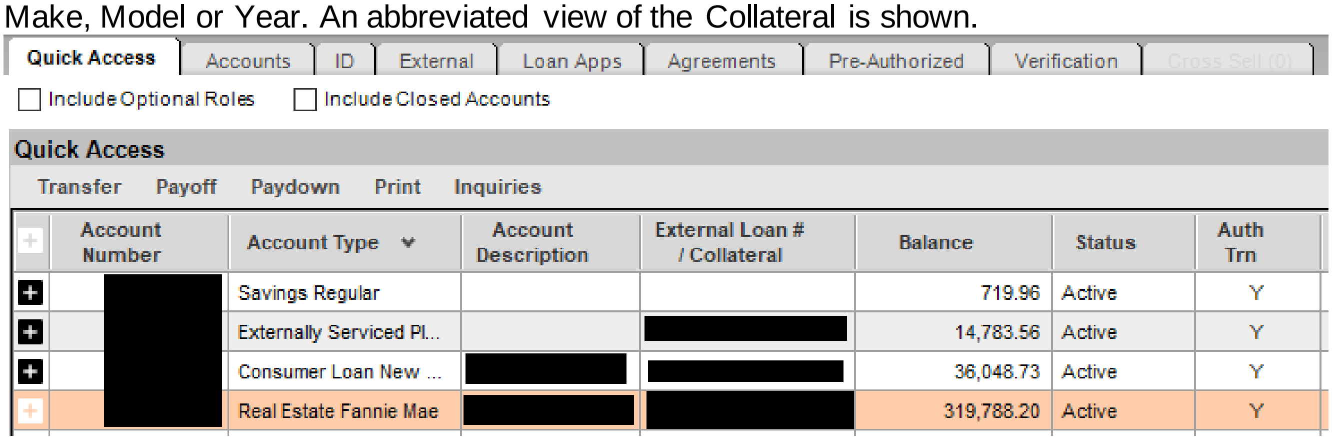
Highlight a loan on the Quick Access or Accounts Tab.

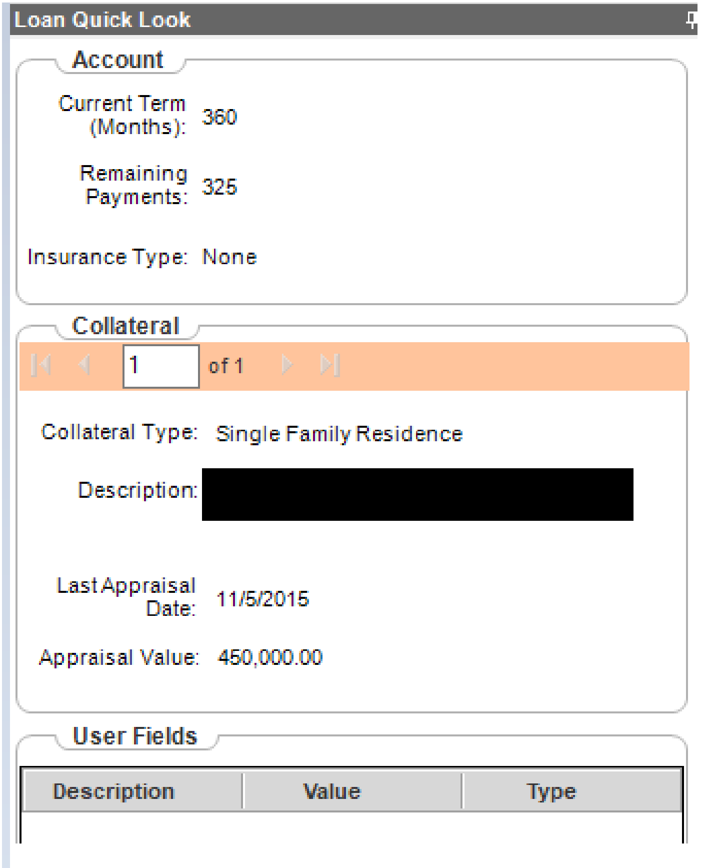


Account Number	Account Type	Account Description	External Loan # / Collateral	Balance	Status	Auth Trn
[redacted]	Savings Regular			5.00	Active	Y
	Checking Free			38.01	Active	Y
	Consumer Loan New Vehicle	2016 CHEVROL...	2016 CHEVROLET S...	25,809.97	Active	Y

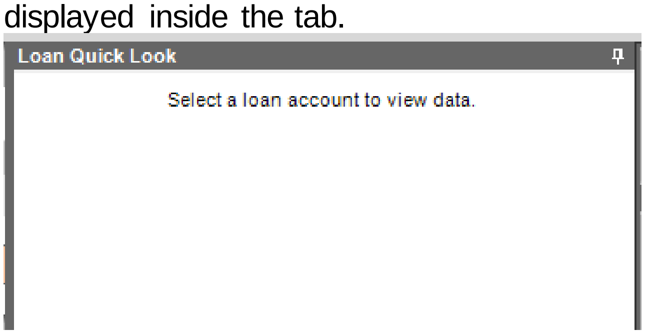


If the collateral on a loan does not have anything contained in the Collateral ID Number, Make, Model or Year. An abbreviated view of the Collateral is shown.

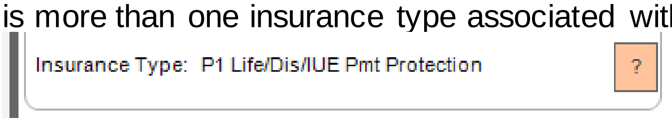




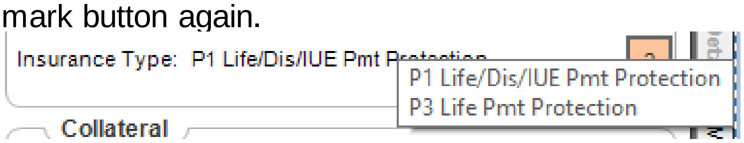
If no account is selected, or you select a deposit account you will see the following message displayed inside the tab.



If you see a button with a question mark next to the insurance description. That means there is more than one insurance type associated with the account.



To view the additional insurance types, click on the question mark button. A tip pops up listing all the insurance types associated with the active account. To hide the tip, click the question mark button again.



Field Listing:

Field	Description
	Display
Current Term (Months)	Current term of the loan in months.
Remaining Payments	Number of payments remaining on the loan.
Insurance Type	Description of the Insurance Account Balance Type. (Balance Acct Type code is entered into the External Interface CrossReference Screen)
Collateral Type	Type of collateral on the loan.
Description	Collateral Description
Last Appraisal Date	Date of the most recent appraisal done on the collateral
Appraisal Value	Value of the most recent appraisal done on the collateral
Collateral ID Number**	Collateral ID Number which commonly is the Vehicle Identification Number for vehicles
[Copy] Button**	Copies the Collateral ID Number for use to paste into websites or any other place to save on entering it yourself.
Make**	Make of the vehicle
Model**	Model of the vehicle
Year**	Year of the vehicle
User Fields	List of defined user fields added to the External Interface CrossReference Screen.
(User Fields) Description	User Field Description
(User Fields) Value	User Field Value
(User Fields) Type	Type of User Field (currently Account or Collateral)

**These fields only display if any one of the 4 contain information for the collateral being viewed.

Additional Requirements:

- DNA™ 4.3 or above
- .NET Framework 4.5.2 (minimum)
- Core API 1.4.1 or higher

Configuration Checklist:

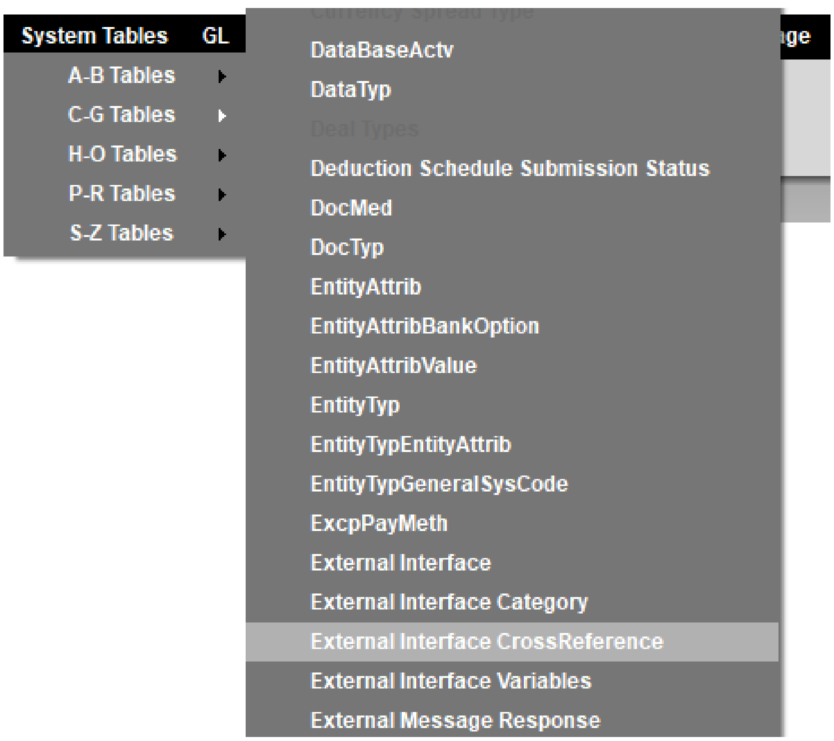
Item	Test Environment	Production Environment
External Interface Variables added for Insurance Balance Acct Type or User Fields (See below for instructions)		
Authorization Items ‘7849’ (CAPR 7849), LQLP(Loan		

Quick Look), and LQLI (Loan Quick Look Interface) are assigned to appropriate authorizations, along with appropriate permissions. Adding these items to a generic authorization that almost everyone has is recommended since this tab is on the relationship screen.		

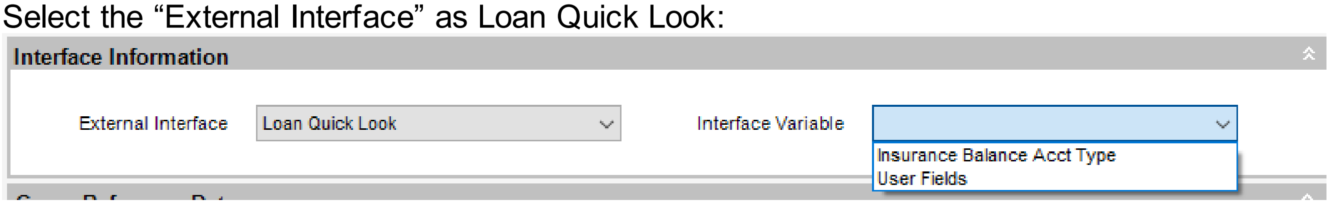
External Interface Variables

System Module:

System Tables > C-G Tables > External Interface CrossReference (you may have to scroll down in the menu to see this option)

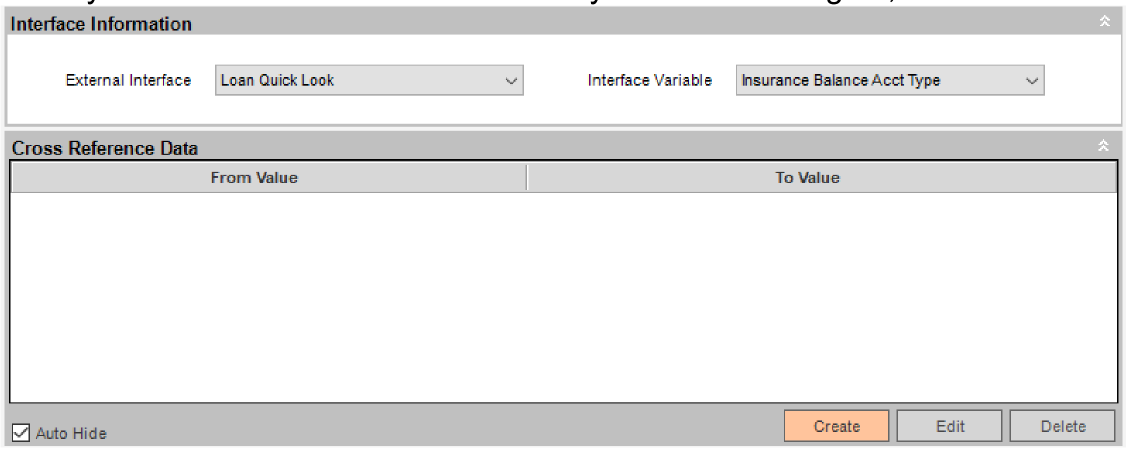


Select the “External Interface” as Loan Quick Look:

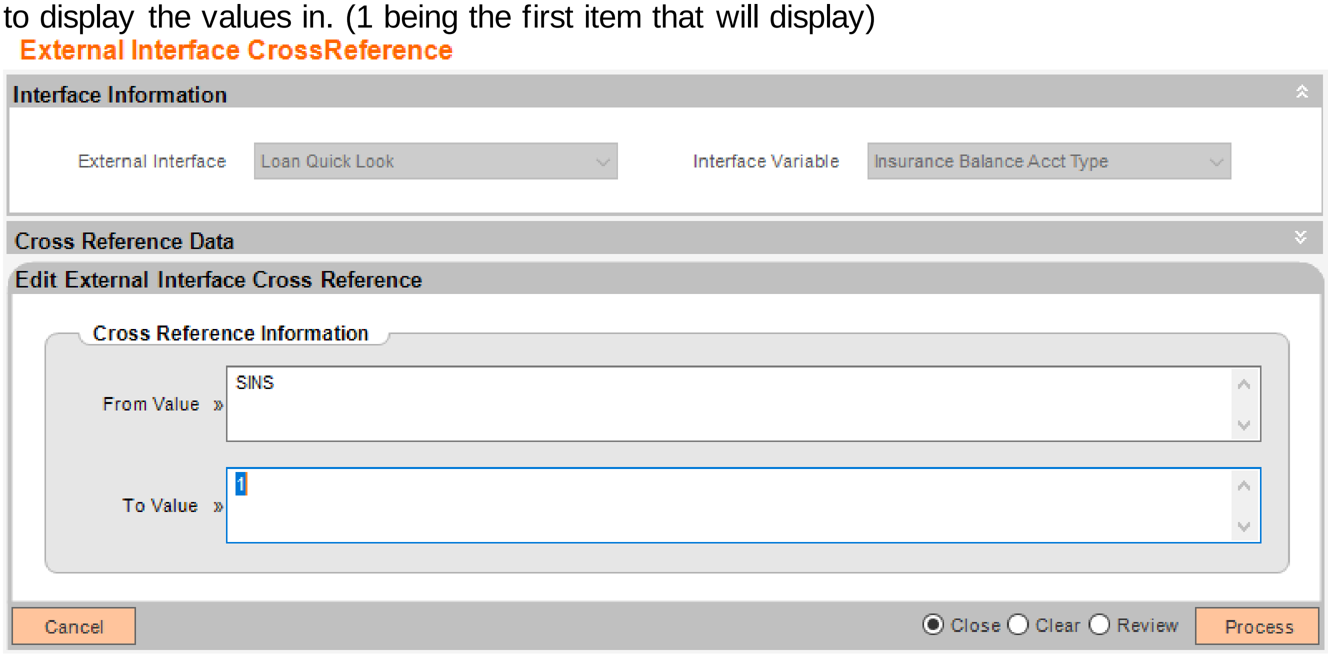


Now select either the Insurance Balance Acct Type or User Fields. The Insurance Balance Acct Type is the 4 character code of your Insurance Account Balance Type, the most common may be SINS (Simple Insurance). User Fields are custom fields created in DNA to house institution specific information.

Once you select which Interface Variable you wish to configure, click the “Create” button.



In the “From Value” Box, enter in the 4 character code that is associated with the Interface Variable you selected. In the “To Value” box enter a number which tells the app which order to display the values in. (1 being the first item that will display)

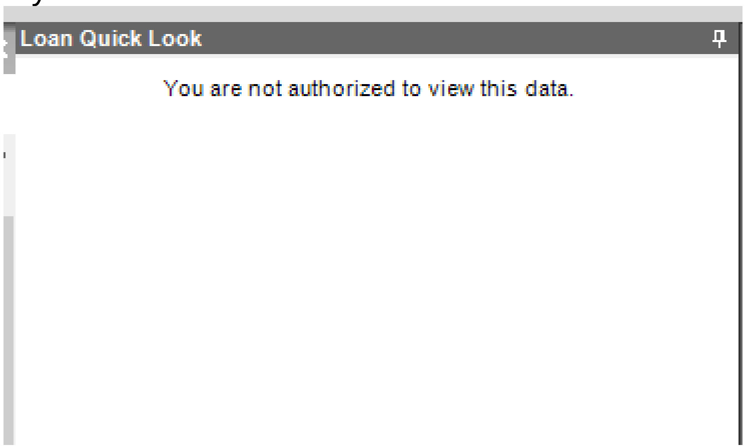


**Note: Currently the slide out only displays one Insurance Balance Acct Type on an account. The question mark button allows you to view each type. There is no limit on the User Fields.

**Tip: For faster entry of multiple values on the same Interface Variable, make sure the “Clear” option next to the “Process” button is selected. That way when you click “Process” your entries are saved and you remain on this form to enter more values.

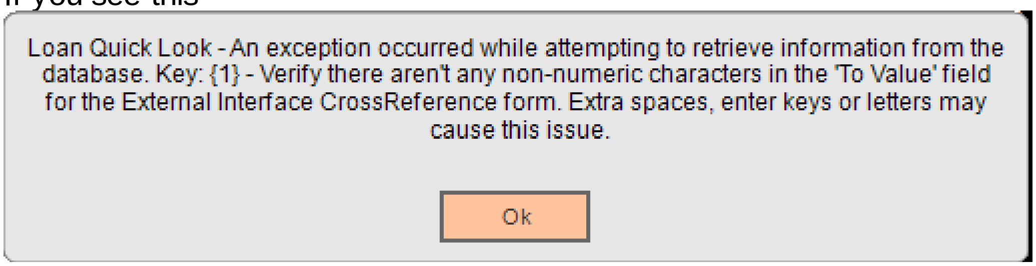
Troubleshooting

If you see this



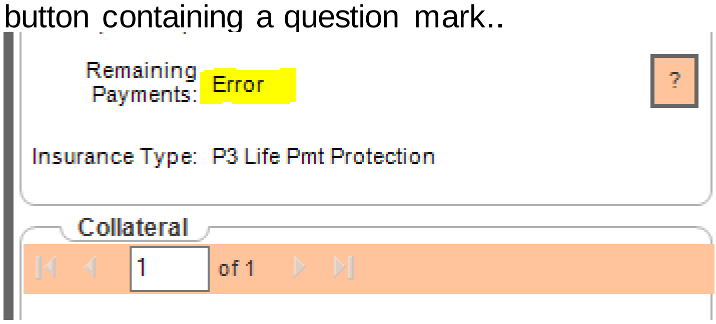
That means the proper permissions to CAPR 7849, and Loan Quick Look Interface have not been given. Make sure to not only add the Authorization Items to the proper Authorizations, but the Authorization Permissions as well.

If you see this

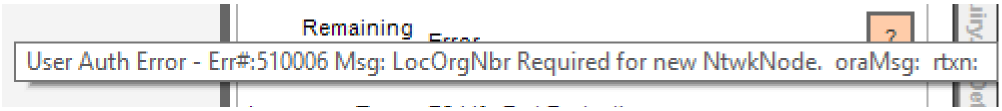


That can mean non numeric characters(spaces, an enter key, a letter etc…) have been entered into the “To Value” on the External Interface CrossReference form. Go through and make sure only a number with no extra spaces or letters has been entered. This only shows up if there are values returned for the user fields or simple insurance field.

On occasion you may also see the word “Error” in the Remaining Payments field along with a button containing a question mark..

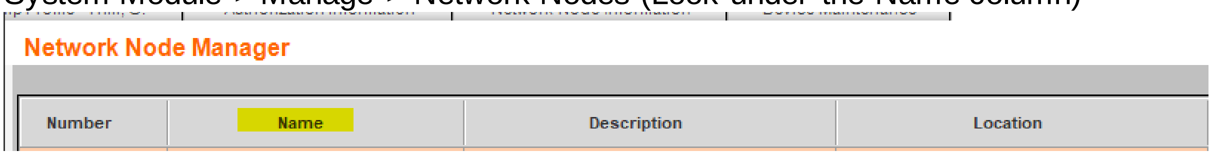


This is usually due to some sort of data discrepancy in the database and what the Core API authentication is looking for. Click the question mark button for a more descriptive error message to appear. To hide the message, click the question mark button again.

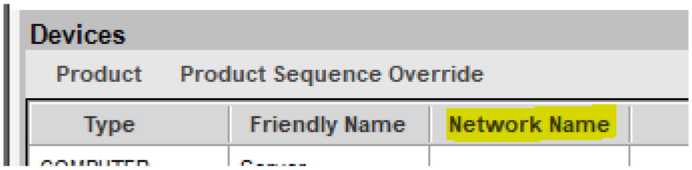


If you see “LocOrgNbr Required for new NtwkNode” the name of the current PC does not match the name of the PC in the database. There are 2 places to check for this information that should match.

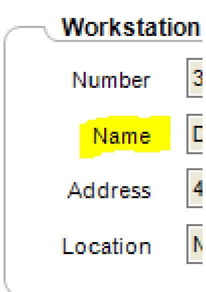
System Module > Manage > Network Nodes (Look under the Name column)



And
SAF Module > Administration > Device > Device (Look under the Network Name column)



There should be a record listed under each of these for the current PC name which you can find by looking under System Module > System > Environment (or anywhere you see the System > Environment menu option)



Revisions

Date	App Version #	Change
01/2020	1.0.0.3	Fix issue with Insurance Type not displaying for certain cases. Add button triggered tips on Remaining payments issues and Multiple Insurance Types.
09/2019	1.0.0.2	Remove tab from Transaction Express Form(caused issue with Hotkeys in DNA upgrade 4.5.2). Fix Authorization bug. More user friendly error notification on Remaining Payments field from Core API.
02/2019	1.0.0.1	ExtIntfCat category added to fix installation bug.
05/2018	1.0.0.0	Application Created