fiserv.

Relationship Inquiry

RelationshipInquiry.dnax
Extension id: 9bb4ce9c-b856-448e-a56c-0fbe82ef266a

Overview:

The Relationship Inquiry DNA Application displays pertinent member information to users who do not need access to account balances. A search function allows you to search by person or organization name. Upon search, a list of records is displayed that meets the search criteria. When a record is selected from the list, more detail is displayed, including a driver's license photo if it exists, member addresses, email addresses, phone numbers, and a list of accounts. Selecting a loan account from the list of accounts will display a list of property records associated to that loan.

Key Benefits:

The Relationship Inquiry DNA Application allows access to key person or organization information without displaying account balances. This application consolidates personal information related to any person or organization, served in a single, easy-to-access screen. With a simple name search, this application provides only the data needed for checking identity and verifying key information, such as address and phone number, as well the member's account and associated property information.

Quick access to member information:
- Addresses, email addresses, and phone numbers.
- Person or Organization Number, Member Number, date of birth, and the last 4 digits of their social security number.
- Driver's license photo, if applicable.
- List of accounts associated with the selected member.
- List of properties associated with the selected loan account.

Navigation:

Relationships Module:
Relationships -> Quick Inquiries -> Relationship Inquiry
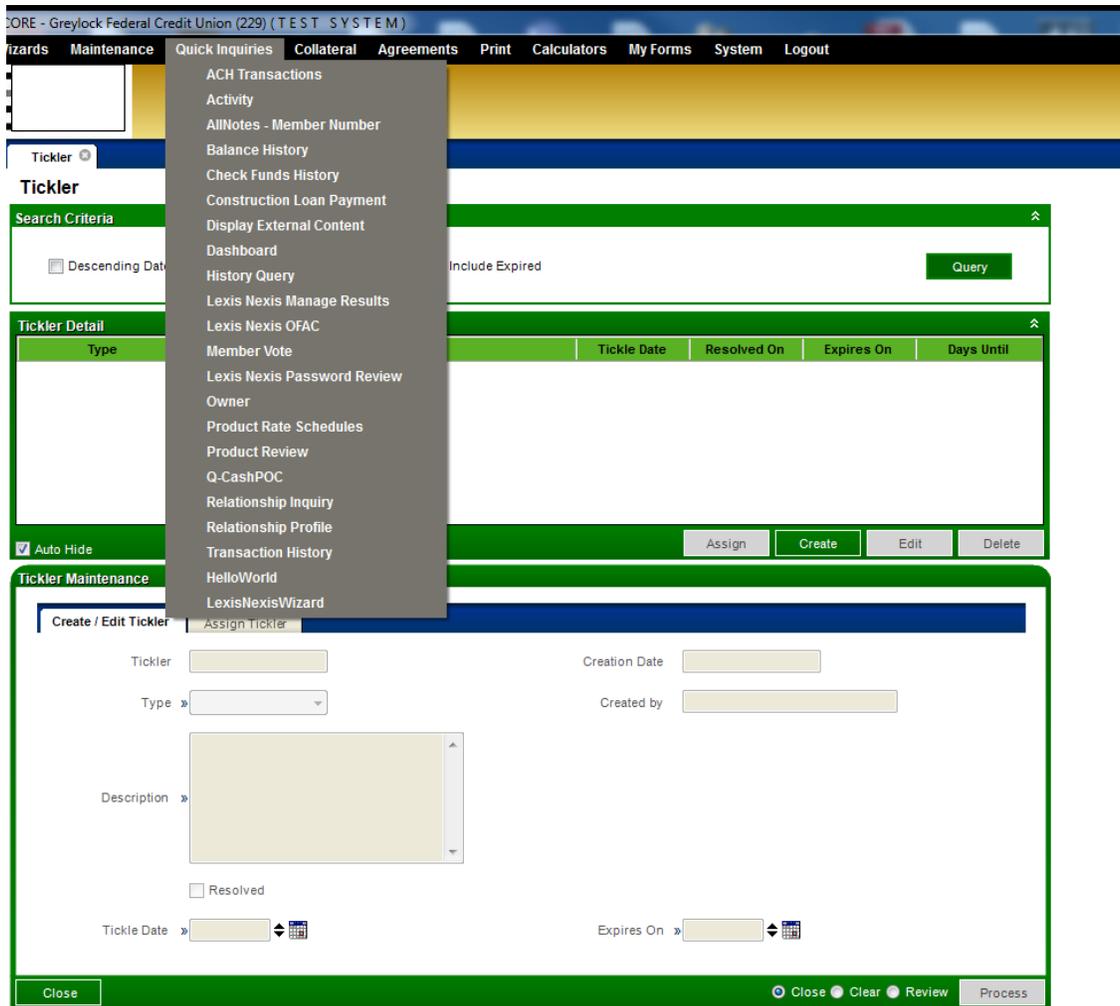
Screens:

The Person radio button is automatically selected when you open the screen. If you wish to look up an Organization select the Organization radio button. Enter a Person's last name or first and last name, or an Organization's name, and click the Search button.

Relationship Inquiry

Search

○ Person   Last Name [   ]   [Search]

○ Organization First Name [   ]

Name	Person or Org Number	Member Number	Last 4 SSN

Image on File / Accounts

Account Number	Major	Minor	Status

Addresses

Address Type	Street Line 1	Street Line 2	City	State

Phone Numbers

Phone Type	Phone Number

Property Information for Account

Property Type	Street	City	State	Description	Prop Vin	Make

[Close]

Screen view when selecting an Organization:

Relationship Inquiry

Search			
○ Person		[ ]	[Search]
◉ Organization	Organization Name	[ ]	

Name	Person or Org Number	Member Number	Last 4 SSN

Image on File / Accounts

Account Number	Major	Minor	Status

Addresses

Address Type	Street Line 1	Street Line 2	City	State

Phone Numbers

Phone Type	Phone Number

Property Information for Account

Property Type	Street	City	State	Description	Prop Vin	Make

[Close]

A list of names will appear. Click on a record in the data grid to display accounts, addresses and phone numbers for that person or organization. Click on a loan account record to view any associated properties for that loan account.

Screen Appearance:

Relationship Inquiry

Field Listing:

Field	Description
Search Box	
Last Name	Example shown: Test
First Name	Example shown: Sally
Displays list of records matching search parameters	
Name	Members Full Name
Person or Org Number	Members person or org number
Member Number	Person or Org member number
Last 4 SSN	Last 4 digits of SSN

| Field	Description
Date of Birth	Person record date of Birth
Identification/Account Listing	
A picture of the identification on record displays when available	
Account Number	Number of account owned by person record
Major	Major Description
Minor	Minor Description
Status	Account Status
Address Listing	
Address Type	Type of address
Street	Street for address record (will be email address for Address type EML)
City	Address City
State	Address State
Zip Code	Address Zip Code
Phone Listing	
Phone Type	Record phone type
Phone Number	Record phone number
Property Information for Account	
Records display here when an account record is selected and property is linked to that account. Different field values display based on the type of property record associated.	
Property Type	Type of Property
Street	Street address of property record
City	City address of property record
State	State address of property record
Description	Description of property
Prop Vin	Vehicle ID number
Make	Vehicle make
Model	Vehicle model
Property Number	Property number
Address Number	Address number
Prop Year	Property year
Insurance Agency	Displays value in Account userfield as defined in Institution Option RNQ1
Insurance Carrier	Displays value in Account userfield as defined in Institution Option RNQ2
Insurance Renewal Date	Displays value in Account userfield as defined in Institution Option RNQ3

Additional Requirements:

- DNA™ 4.2.2 or above
- DNA ™ CoreAPI 1.6.1 or above
- .NET Framework 4.5.2 (minimum)

Configuration Checklist:

Authorizations:

The authorization items "CAPR 7823", "CAPR 7711" and "RelInq CAPI" or the AuthCd "RINQ" which has all AuthItems in it and is installed with the application will need to be granted to any end user that will need access to this App.
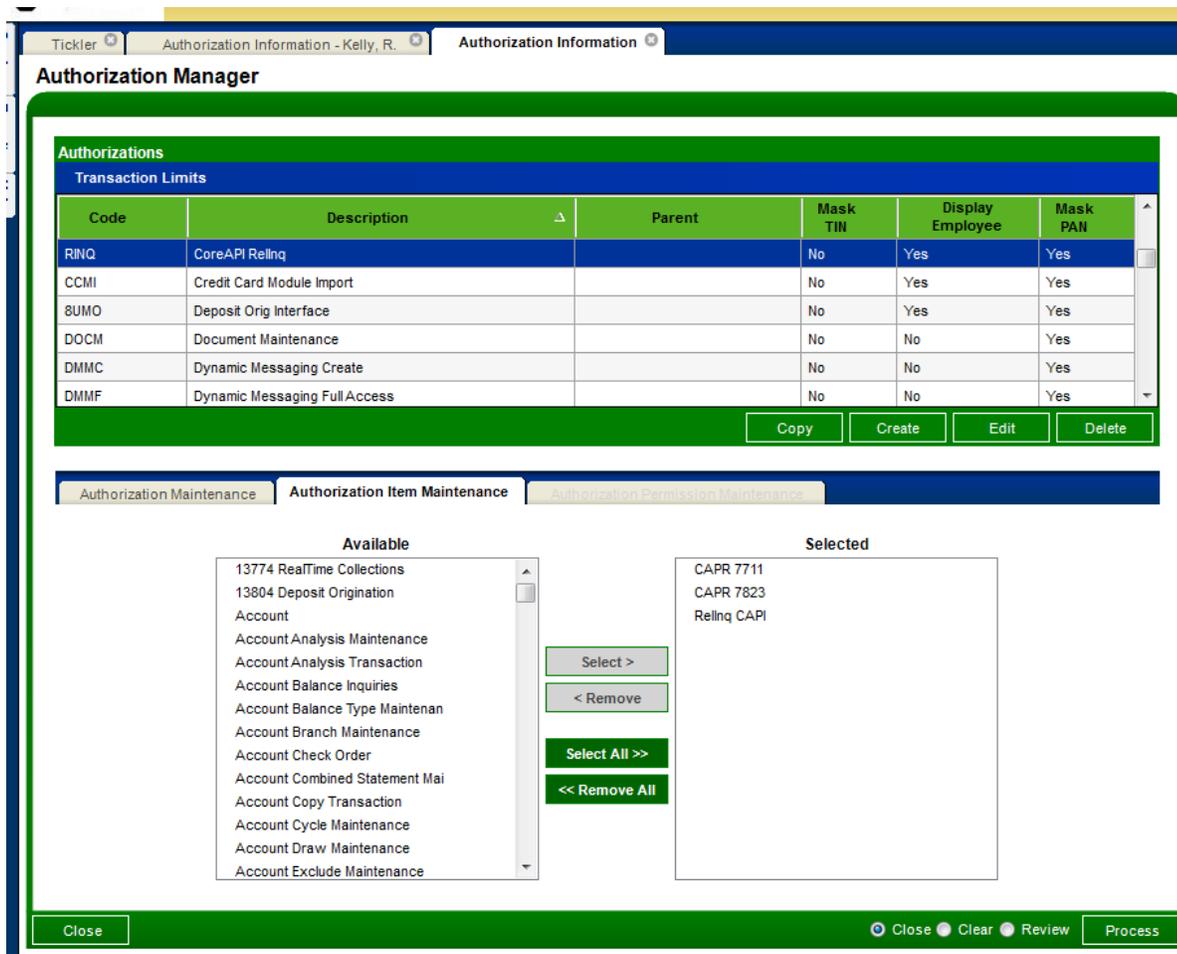
Institution Options:

Navigate to Services -> System -> Institution -> Institution Options
Select the Institution Option Category "Uncategorized"

Set each of these options with a value of an account user field that will display the Insurance Agency, Insurance Carrier and Insurance Renewal Date.

Institution Option

Selection Criteria ⌃

Institution Option Category [Uncategorized ▾]

Institution Options ⌃

Values

Code	Description	In Use YN	Value	Data Type
RNQ1	Relnq Ins Agency Acct Usr Fld	Yes		Variable Character
RNQ2	Relnq Ins Carrier Usr Fld	Yes		Variable Character
RNQ3	Relnq Renew Date Usr Fld	Yes		Variable Character

☑ Auto Hide   [Create] [Edit] [Delete]

If these options are not populated a message will display stating which bank options need to be populated and the form will close.

Bank Option Relnq Ins Agency Acct Usr Fld required value is missing
Bank Option Relnq Ins Carrier Usr Fld required value is missing
Bank Option Relnq Renew Date Usr Fld required value is missing
This screen will close.

[Ok]

Item	Test Environment	Production Environment
Create Account user field for Insurance Agency		
Create Account user field for Insurance Carrier		
Create Account user field for Insurance renewal Date		
Set Bank Option		
Assign Authority Code RINQ to employees OR Assign AuthItems CAPR 7711, CAPR 7823 and Relinq CAPI to an existing Authority Code and add the correct AuthItem Permissions		

Revisions:

Date	App Version #	Change
05/2017	1.0.0.0	DNAapp Created