

Relationship Inquiry

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

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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

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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 Image on File / Accounts Organization First Name Name Person or Org Number Name Person or Org Number Name Name Name Person or Org Number Name Name	Search Image: Search Image: Organization First Name Name Person or Org Number Name Person or Org Number Last 4 SSN	nage on File / Accounts
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Screen view when selecting an Organization:

Relationship Inquiry

Saarah	Image on File / Accounts
Search	Intrage on File / Accounts
O Person Search	
Organization Organization	
Name	
Name Person or Ora Number Member Number Last 4 SSN	
	Account Number Major Minor Status
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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

Person	Lead Marca	Test			0						
Person	Last Name	lest			Searc	h					
Organization	First Name	Sally									
Name	Person or Org N	umber	Member N	umber	Last 4 SS	SN					
Test, Sally	172199	4	86860	:	*****55555	0					
							Account	Number	Major	Minor	Status
							10029197	'92	Checking	Checking	ACT
							10029197	83	Shares	Primary Share	ACT
						•	•				
Addresses						•		Phone N	lumbers	III Phone	Number
Addresses	Street Line 1	III Stre	eet Line 2	City Ditts field		State		Phone N Phone 1 ER	lumbers	Phone (413) 555-5555	Number
Addresses Address Type PRI EML	Street Line 1 1 Test St test@test.com	Stre	eet Line 2	City Pittsfield		State MA		Phone N Phone 1 ER	lumbers	III Phone (413) 555-5555	Number
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Field Listing:

Field	Description			
Searc	h 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			

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Field	Description			
Date of Birth	Person record date of Birth			
Identification/A	Account Listing			
A picture of the identification on record displa	ys 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 Informa	ation for Account			
Records display here when an account record	is selected and property is linked to that			
account. Different field values display based of	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.

Authorization	6						
Transaction	Limits						
Code	Description	Δ	Parent	Mask TIN	Err)isplay 1ployee	Mask PAN
RINQ	CoreAPI Rellng			No	Yes		Yes
CCMI	Credit Card Module Import			No	Yes		Yes
8UMO	Deposit Orig Interface			No	Yes		Yes
DOCM	Document Maintenance			No	No		Yes
DMMC	Dynamic Messaging Create			No	No		Yes
DMMF	Dynamic Messaging Full Access			No	No		Yes
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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 Opt	Institution Option Category Uncategorized							
Institution Option	S							*
Values								
Code	Descr	iption	In Use YN	Value		Data Type		^
RNQ1	Reling ins Agenc	y Acct Usr Fld	Yes		Variable Ch	aracter		
RNQ2	Reling Ins Carrie	r Usr Fld	Yes		Variable Ch	aracter		
RNQ3	Reling Renew Da	ate Usr Fld	Yes		Variable Ch	aracter		
	•		·					
🔽 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.



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