



Teller Express Alerts

Transaction Express Account Status Alert
PS_TEAaccountStatusAlerts
DNAapp ID 0fb8a82d-0b01-4123-b2fd-401eb676bfc1

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Overview:

PS_TEAaccountStatusAlerts generates an alert message on the Transaction Express screen if the owner of the selected account has one or more delinquent loan accounts or any deposit account with a negative available balance.

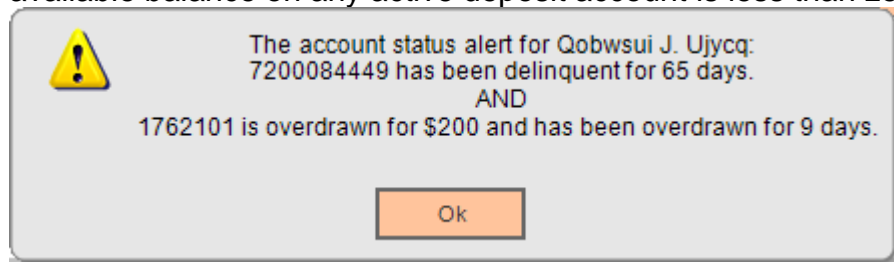
Key Benefits:

The TE Account Status Alert DNAapp alerts staff members on the Transaction Express screen if the owner of the transaction account has one or more delinquent loans or overdrawn deposit accounts. With this app:

- The user is alerted when the owner of the transacting account has delinquent account(s) and/or account(s) that are overdrawn.

Processing:

As shown below, the alert message on Transaction Express screen notifies the user if the tax reported owner of the transaction account (person or organization) has a delinquent loan or the available balance on any active deposit account is less than zero as shown below:

**Variables:**

Institution level variables used to configure the available method to use for the available balance and the number of days delinquent to get the alert.

Calculation Category	Code	Description
Account Status Alert	8TEA	Calculation Category for below calculation type.

Calculation Type	Code	Description
Account Status Alert	8TEA	Calculation Type for below calculation variables.

Calculation Variable	Code	Description	Default
Delinquent Days	8NDQ	Number of days to get the account delinquent alert	30
Available Method Code	8IIA	Available Method Code to use when calculating the available balance for deposit accounts	ONLI

Panel:**Navigation:**

Services >> Relationships >> Maintenance >> Deposit Accounts >> Monetary >> Transaction Express

Services >> Relationships >> Maintenance >> Loan Accounts >> Monetary >> Transaction Express

Services>> Relationships >> Maintenance >> Person/Member >> Transaction Express >> Select an account

Services >> Relationships >> Maintenance >> Organization >> Transaction Express >> Select an account

Services >> Relationships >> Maintenance >> Safe Deposit Accounts >> Box Maintenance >> Monetary >> Transaction Express

Screen Appearance:

General Information:

Employees must have permission setup for the TE (Transaction Express) Authorization Item. There is no separate Authorization Item for the alert screen.

Exclusions:

Past due externally-serviced accounts are not included in the alerts panel.

Configuration Checklist:

Item	Test Environment	Production Environment
Variables		

Installation:

Note: If you obtained this application from the AppMarket, please disregard the installation instructions below. If you did not obtain this application from the AppMarket, please complete the installation instructions below.

Install the PS_TEAaccountStatusAlerts.dnax application through DNAapp Management Console (formerly known as DNA Configuration Toolkit). The instructions on how use the DNAapp Management Console should be delivered along with the DNAapp Management Console. Please contact Client Care if you need assistance using the DNAapp Management Console.

Client Side dll files PS_TEAaccountStatusAlerts.UI.dll & PS_TEAaccountStatusAlerts.Business.dll for this application should be placed at each branch server in the following path:

X:\OS\DNA_Client\DNAapps\9999\Bin

Where:

X = drive mapping for the branch server the DNA client is located on
9999 = the current DNA release

Revisions:

Date	App Version #	Change
10/2021	1.0.0.2	Updated uninstall script for changed calculation variable AMTH to 8IIA
09/2021	1.0.0.2	Changed reference to AppMarket
09/2021	1.0.0.2	Changed calculation variable AMTH to 8IIA
08/2021	1.0.0.1	Documentation change only: Clarified General Information section for authorization item setup (no setup needs to be maintained for this application)
06/2021	1.0.0.1	Added visibility for panel on tab on side of screen (although grayed out since no data would be populated in tab) to eliminate Stack Trace error when installed with another panel
03/2021	1.0.0.0	Application created