Display Key Calculation Metrics (Quick Loan Analysis)

Business Requirements: 🔗

1. Create a Quick Loan Analysis feature that will calculate and display key calculation metrics for the loans that are currently in view on the Collateral Visualization Canvas. This feature can be opened or hidden from view by the user. This is essentially a "snapshot" or condensed calculation view of the more in-depth Collateral Analysis Screen. (Insert future Confluence Link here)

Functional Requirements: 🔗

Must Have's: 🔗

1. When first opening the Collateral App, the Quick Loan Analysis modal will be hidden and display as a Link in the bottom right of the screen. The link will say "Quick Analysis". (See screenshot below)
2. Clicking on that link will open the Quick Loan Analysis calculation modal. This calculation modal will also be displayed on the bottom right of the screen. (See screenshot below)
3. The Quick Loan Analysis box can be closed by clicking the minimize button ⊟
4. Once Quick Loan Analysis box is open, the user can click the "View Collateral Analysis" link that will take them to the full Collateral Analysis Screen. (Insert future Confluence Link here)
5. The Quick Loan Analysis box will display five columns of information:
   a. Loan Number (Name?): This will display the AgWorx loan number
   b. Type (Loan Type): This is the Loan Type chosen for the loan
      i. "LT" = Long Term
      ii. "IT" = Intermediate Loan
      iii. "ST" = Short Term
   c. Loan Amount: This is the Total Commitment Amount
   d. **LN/MV**: This is a calculation of Loan Amount divided by Market Value of the linked collateral
      i. Loan Amount = **Adj. Loan Amount** (calculation described below)
      ii. Market Value = **Allocated Market Value** (calculation described below)
   e. **LN/NRV%**: This is the calculation of Loan Amount divided by Net Realizable Value (NRV) of the linked collateral
      i. Loan Amount = **Adj. Loan Amount** (calculation described below)
      ii. NRV% = **Final Adj. NRV Amount** (calculation described below)
6. Must Have: Click a button to run calculations and update the values.
   a. Nice to Have: Auto-Update the values in the Quick Loan Analysis as changes are made that will impact calculations.
7. The Quick Loan Analysis will only contain "Open" loans. No "Closed Loans" will be displayed.

Collateral Calculations Overview

- Total Loan Amounts: Summation of all loans in the same position
- Market Value: Value of the collateral
- Allocation %: Loan Amount (÷) Total Loan Amounts
- **Allocated Market Value**: Market Value (x) Allocation %
- **Final Adj. NRV Amount**: Allocated Market Value (x) NRV% (x) Lien Position %

Loan Calculations Overview

- Loan Amount: Total Commitment Amount

- **Adj. Loan Amount**: Loan Amount (+) Prior Liens (Non-FCS + FCS) ((FCS = Farm Credit System, Non-FCS is any loan that is not a part of the FCS))
- Allocated Market Value: Summation of all Allocated Market Value of Collateral
- Final Adj. NRV Amount: Summation of all Final Adj. NRV Amount
- **Loan/MV**: Adj. Loan Amount (÷) Allocated Market Value
- **Loan/NRV**: Adj. Loan Amount (÷) Final Adj. NRV Amount
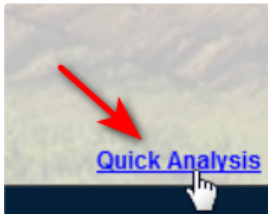
Nice to Have's: 🔗

1. The loan name/number will be a hyperlink and clicking on it will open that loan up in AgWorx.

Non-Functional Requirements: 🔗

1. TBD

Screenshots of old functionality: (NOTE: These screenshots are of the older version. The new functionality may look similar to this, but will not be exact. This is just for example only.) 🔗

Link that will open up Quick Loan Analysis modal: