Customer Search Feature

Business Requirement:

1. Create a Customer Search Feature that will allow ACA users to search for existing customers and open their collateral records.

Functional Requirements:

Must Have’s:

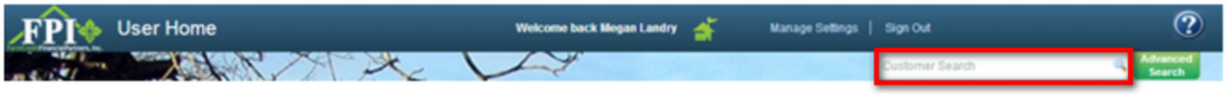
1. The customer search feature should be available always, no matter where a user navigates within the application. At minimum this should include:
   a. The Home Screen
   b. Within a customer’s collateral structure (scenario)
2. The search would be performed by entering a Customer Name into the “search” field and hitting “enter” on the keyboard or hitting a “Search” button.
3. Results of the search should include all exact matches, near-matches to the customer name entered, or recently opened customers.
4. The user may then click on the particular customer from the search results and would be launched into that customers collateral structure (scenario).

Nice to Have’s:

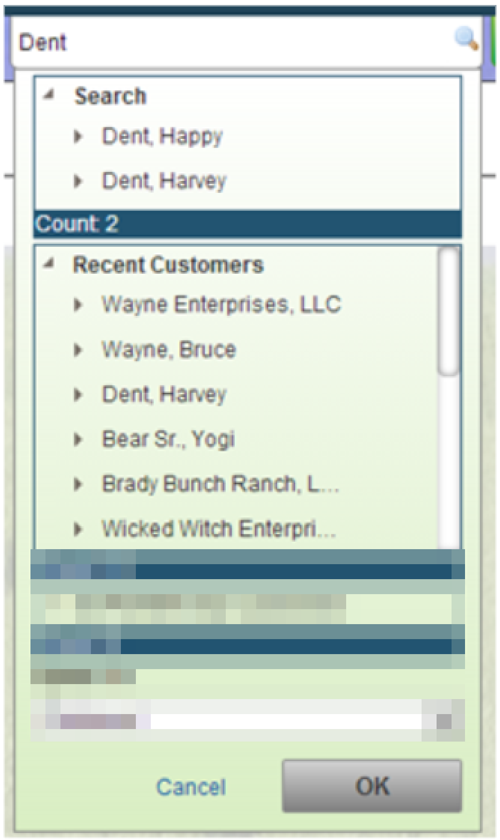
4. Create a “Tool Tip” pop-up feature that allows the user to hover their mouse over customers from their search results. When the mouse is hovered over the customer name, it will display information containing:
   a. Customer Name
   b. Address
   c. Phone
   d. Files As name
   e. Associated Branch
   f. Last four digits of the tax identification number
5. Create an Advanced Search feature. The search feature would allow a user to search for a customer against broad or specific information such as:
   a. Branch
   b. Loan Officer
   c. Account Number
   d. Employee Relationship
   e. Loan Number
   f. Loan Name
   g. Takedown Name
   h. Product Package

Screenshots of old Search 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.)

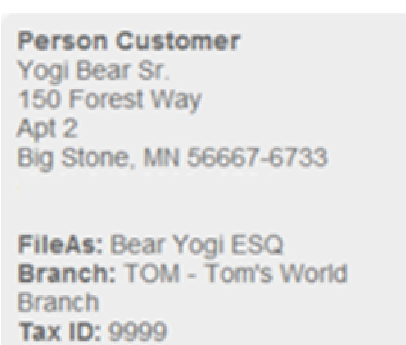
Customer Search Bar:



Search Results:



Tooltip pop-up when user hovers in Search results:



Advanced Search: