

Execution Summary				
Script ID: PREMIER_TC001	Script Description: Launch and login to application.Capture customer details	Start Time: 2021/11/01 16:47:50	End Time: 2021/11/01 16:50:05	Total Execution Time: 0:0:2:15 Seconds
Execution Result: Passed	Module: Premier	Passed Checkpoints: 17	Failed Checkpoints: 0	

S.No.	Step Description	Actual Result	Status
Check1	Launch Premier application	Launch Successfully	PASSED

Test Bank - Premier Navigator

My Groups

My Groups

Select Group:

FEATLDBG

Submit

Test Bank - Premier Navigator

Security Control Module

Log In

User:

Password:

Institution:

00

Submit

Cancel

Test Bank - Premier Navigator

CUSTOMER

PORTFOLIO

DDA

SAV

COD

LOAN

SDB

Name

SSN

EIN

Search

Concurrent session detected.
Last Login: Nov 1, 2021 7:15 AM

Home Page

Recent

Security Control

Modeling

Customer

Portfolio

Deposits

Lines

Loans

Master Agreements

Collateral

Safe Deposit Box

PTP Batch-Loans

Specifications

OFAC Reporting

Check4	Home Menu Page	Customer from menu selected Successfully	PASSED
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Test Bank - Premier Navigator

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Recent

Security Control

Modeling

Customer

Customer Inquiry

Customer/Portfolio Group Inquiry

Contacts

Names

Address

Address Change Management

Portfolio

Deposits

Lines

Loans

Master Agreements

Collateral

Safe Deposit Box

PTP Batch-Loans

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Search

Concurrent session detected.
Last Login: Nov 1, 2021 7:15 AM

Customer - Names - New Name

Recent

Security Control

Modeling

Customer

Customer Inquiry

Customer/Portfolio Group Inquiry

Contacts

Names

Name Inquiry

New Name

Change Name

Delete Name

Address

Address Change Management

Portfolio

Deposits

Lines

Loans

Master Agreements

Collateral

Safe Deposit Box

PTP Batch-Loans

Specifications

CFAC Reporting

Processing Request

Test Bank - Premier Navigator

CUSTOMER

PORTFOLIO

DD

☒ Name

☐ SSN

☐ EIN

Concurrent session detected.
Last Login: Nov 1, 2021 7:15 AM

Customer - Names - New Name

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Portfolio

Deposits

Lines

Loans

Master Agreements

Collateral

Safe Deposit Box

PTP Batch-Loans

Specifications

OFAC Reporting

2 of 5

1 - Name

2 - Duplicate

3 - Contact Methods

4 - Codes

5 - Build Relationships

Step 2 - Duplicate

Name Entered

Name	Tax Identification	Date of Birth
Jim Garrell	SSN 034-53-4333	Sep 28, 1978

Possible Name Duplicates

No Possible Name Duplicates

Back

Finish

Next

Cancel

1

Test Bank - Premier Navigator

CUSTOMER

PORTFOLIO

DD

Concurrent session detected.

Last Login: Nov 1, 2021 7:15 AM

3 of 5

1 - Name

2 - Duplicate

3 - Contact Methods

4 - Codes

5 - Build Relationships

Step 3 - Contact Methods

Phone Numbers

Field	Primary	Value
<div>Home Phone</div>	<input checked="" type="radio"/>	No Primary Phone Number

E-mail Addresses

Field	Primary	Value
<div>E-Mail Address</div>	<input checked="" type="radio"/>	No Primary E-mail Address

Web Addresses

Field	Value
<div>Add Web Page Address</div>	

Back

Finish

Next

Cancel

Test Bank - Premier Navigator

CUSTOMER

PORTFOLIO

DD

Name

SSN

EIN

Concurrent session detected.
Last Login: Nov 1, 2021 7:15 AM

Customer - Names - New Name

4 of 51 - Name2 - Duplicate3 - Contact Methods4 - Codes5 - Build Relationships

Recent

Security Control

Modeling

Customer

Customer Inquiry

Customer/Portfolio Group Inquiry

Contacts

Names

Name Inquiry

New Name

Change Name

Delete Name

Address

Address Change Management

Portfolio

Deposits

Lines

Loans

Master Agreements

Step 4 - Codes

Codes

Gender:

Not Specified

Race:

Language Preference Indicator:

Use Institution Specification

Employee Officer Director:

Risk Score 1:

Risk Score 2:

Risk Ranking:

NONE [0]

Credit Score:

NAICS Code:

Customer Type:

None

Disclosure Option:

Disclosure Date:

Responsibility Code:

Referral Responsibility Code:

Branch Region:

Accounting Branch:

Name Retention Code:

Residency Status:

Open Method:

Creation Date:

Date Deceased:

Additional Information

Field	Value	Ex
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1

Test Bank - Premier Navigator

CUSTOMER

PORTFOLIO

DD

Name

SSN

EIN

Concurrent session detected.
Last Login: Nov 1, 2021 7:15 AM

Customer - Names - New Name

Recent

Security Control

Modeling

Customer

Customer Inquiry

Customer/Portfolio Group Inquiry

Contacts

Names

Name Inquiry

New Name

Change Name

Delete Name

Address

Address Change Management

Portfolio

Deposits

Lines

Loans

Master Agreements

Collateral

Safe Deposit Box

PTP Batch-Loans

Specifications

OFAC Reporting

5 of 5

1 - Name

2 - Duplicate

3 - Contact Methods

4 - Codes

5 - Build Relationships

Step 5 - Build Relationships

Name

No name relationships exist.

Address

No address relationships exist.

Beneficial Ownership

Beneficial Owner Name	Relationship	Percent	Description	Reciprocal Relationship
None	Control Person		None	None
None	Beneficial Owner		None	None
None	Beneficial Owner		None	None
None	Beneficial Owner		None	None
None	Beneficial Owner		None	None

Back

Finish

Change

Cancel

Test Bank - Premier Navigator

CUSTOMER PORTFOLIO DDA SAV COD LOAN SDB

Concurrent session detected.
Last Login: Nov 1, 2021 7:15 AM

Customer - Names - New Name

Recent

- Security Control
- Modeling
- Customer**
 - Customer Inquiry
 - Customer/Portfolio Group Inquiry
- Contacts
- Names**
 - Name Inquiry
 - New Name
 - Change Name
 - Delete Name
- Address
 - Address Change Management
- Portfolio**
- Deposits
- Lines
- Loans
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- Collateral
- Safe Deposit Box
- PTP Batch-Loans
- Specifications
- OEAC Reporting

The record was updated successfully.

Check11

[Home Menu Page](#)

Menu Contacts selected
Successfully

PASSED

Concurrent session detected.
Last Login: Nov 1, 2021 7:15 AM

Customer - Contacts - New Name Contact

CUSTOMER PORTFOLIO DDA SAV COD LOAN SDB

☒ Name
 ☐ SSN
 ☐ EIN

Search

- Security Control
- Modeling
- Customer
 - Customer Inquiry
 - Customer/Portfolio Group Inquiry
 - Contacts
 - Name Contact Inquiry
 - New Name Contact
 - Names
 - Name Inquiry
 - New Name
 - Change Name
 - Delete Name
 - Address
 - Address Change Management
- Portfolio
- Deposits
- Lines
- Loans
- Master Agreements
- Collateral
- Safe Deposit Box
- PTP Batch-Loans
- Specifications
- CEAC Reporting

Processing Request

Test Bank - Premier Navigator

CUSTOMER

PORTFOLIO

DD

☒ Name
 ☐ SSN
 ☐ EIN

Concurrent session detected.
 Last Login: Nov 1, 2021 7:15 AM

Customer - Address - New Address

2 of 3

1 - Address

2 - Duplicate

3 - Build Relationships

Customer Inquiry
 Customer/Portfolio Group Inquiry
Contacts
 Name Contact Inquiry
 New Name Contact
Names
 Name Inquiry
 New Name
 Change Name
 Delete Name
Address
 Address Inquiry
 New Address
 Change Address
 Delete Address
 Address Change Management

Portfolio

Deposits

Lines

Loans

Master Agreements

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Specifications

Step 2 - Duplicate
 Address Entered

Address 1:	Address 2:	City State Zip
389 Ganttown Rd	Sewell	8080

 Possible Address Duplicates
 No Possible Address Duplicates

Back

Next

Cancel

Test Bank - Premier Navigator

CUSTOMER

PORTFOLIO

DD

Name

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EIN

Concurrent session detected.
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Customer - Address - New Address

3 of 3

1 - Address

2 - Duplicate

3 - Build Relationships

Customer Inquiry

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Contacts

Name Contact Inquiry

New Name Contact

Names

Name Inquiry

New Name

Change Name

Delete Name

Address

Address Inquiry

New Address

Change Address

Delete Address

Address Change Management

Portfolio

Deposits

Lines

Loans

Master Agreements

The following error(s) occurred:

The Address ID is not on file.

Step 3 - Build Relationships

Names

Name

Relationship

Jim Garrell

Home

Address

No address relationships exist.

Back

Finish

Change

Cancel

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Concurrent session detected.

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Customer - Address - New Address

3 of 3

1 - Address

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3 - Build Relationships

Customer Inquiry

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Contacts

Name Contact Inquiry

New Name Contact

Names

Name Inquiry

New Name

Change Name

Delete Name

Address

Address Inquiry

New Address

Change Address

Delete Address

Address Change Management

Portfolio

Deposits

Lines

Loans

Master Agreements

Collateral

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PTP Batch-Loans

Specifications

CEAC Reporting

The following error(s) occurred:

The Address ID is not on file.

Step 3 - Build Relationships

Names

Name

Jim_Garrel

Relationship

Home

Address

No address relationships exist.

Back

Finish

Change

Cancel

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