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# Indirect Lending

## Ready to Book

### INTRODUCTION

If your credit union is looking to partner with a third-party loan origination system CU\*BASE works with multiple vendors to bring those loans to the core. The Ready to Book model allows you to bring in loan applications from a third-party that are approved and ready for account creation, funding, and document generation.

### CONTENTS

OVERVIEW.....	2
CONFIGURING CU*BASE.....	4
CONFIGURING EXTERNAL LOAN DELIVERY CHANNELS.....	4
CONFIGURING LOAN PRODUCTS FOR INDIRECT CHANNELS.....	6
CONFIGURING DEALERS IN CU*BASE.....	7
WORKING WITH LOAN APPLICATIONS FROM EXTERNAL DEALERS.....	9
BOOKING THE LOAN.....	10
LINKING INDIRECT LOANS.....	15

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For an updated copy of this booklet, check out the Reference Materials page of our website:  
<https://www.cuanswers.com/resources/doc/cubase-reference/>  
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# OVERVIEW

## Selecting a Loan Origination System

Get started by investigating the indirect lending vendors available that interface with CU\*BASE, we have created a full-featured website allowing you to evaluate all your options (shown on the next page)

## Configuration of Delivery Channel

The delivery channel configuration will be handled by a Lender\*VP Team Member after signing up with a third-party LOS. The applications will be set to always approve to prevent duplicate credit pulls. The channel will also be set to look at all collateral types outside of mortgage collateral.

## Reviewing a Loan in the Loan Queue

Once this setup is complete, you are ready to begin receiving loans in the CU\*BASE loan queue. Loan applications will appear in the queue just like other loan applications. You will be able to identify the applications based on the Delivery Channel ID. See column DC in the loan queue.

## Working the Application

The applications that are imported to CU\*BASE from the LOS software should not be modified once in CU\*BASE. Any changes to the loan application will trigger the application to re-amortize based on CU\*BASE calculations. This may cause the loan amounts to be different than what was calculated from the vendor software.

The applications submitted should only be those that are approved. Your loan officers will only need to create the loan account, disburse funds, generate loan forms, and set up any automated payment settings.

## Credit Report Data

Any credit report detail information used to decide on an application will remain within the partner LOS system. When importing the applications for funding no credit score or credit report data will be attached. There will also not be access to an archived credit report in CU\*BASE. This has an effect on some of the Tools available in CU\*BASE.

### Tools Impacted

- **Tool #318 Credit Report Data Mining**
- **Tool #319 Credit Score History Dashboard**
- **Tool #460 Loan Concentration Risk Report by Member**
- **Tool #472 Loan Queue Activity tracking** (*Activity Tracking on the Work/View Application Tracking screen*)
- **Tool #679 Print Risk Score Analysis Report**

## Getting Started

To select a Loan Origination System and begin your work with Lender\*VP, select the vendor you would like to work with in the CU\*Answers store. In the CU\*Answers store select Lender\*VP and then Loan Origination Systems. A selection of current vendors available. There is even an option to select a vendor not listed in the store. Access the page directly via this URL:

<https://store.cuanswers.com/product-category/lendervp/loan-origination-systems-ready-to-book-loans/>

The screenshot shows the top portion of the CU\*Answers website. At the top right, there is a user greeting "Welcome, Guest!" with links for "Log In / Register" and a search bar. The CU\*ANSWERS logo is on the left. Below the logo are links for "Shop", "My Account", and "Contact Us", along with a shopping cart icon showing 0 items. A dark navigation bar contains links for "CU\*ANSWERS STORE", "MY ACCOUNT", "SOLUTIONS", and "BACK TO CU\*ANSWERS". Below this is a breadcrumb trail: "Home > Lender\*VP > Loan Origination Systems - Ready to Book Loans".

## Loan Origination Systems - Ready to Book Loans

Loan Origination Systems are complete start to finish loan underwriting process. Different systems offer different capabilities depending on the vendor. Also note, not all LOS systems will integrate with CU\*BASE.



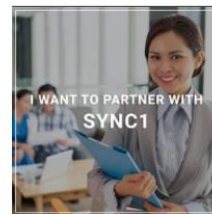
I Want to Partner With Lending Solutions Inc.  
\$500.00

Add to cart



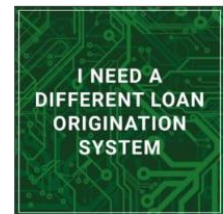
I Want to Partner with MeridianLink Inc.  
Quote Provided

Add to cart



I Want to Partner with Sync1  
\$3,000.00

Add to cart



I Need a Different Loan Origination System  
Quote Provided

Add to cart

# CONFIGURING CU\*BASE

## CONFIGURING EXTERNAL LOAN DELIVERY CHANNELS

The indirect lending delivery channel is the first link to a third-party source of loan applications through the “XML Lending Gateway.” If your credit union has been set up to use this channel, you may access various configuration screens here that will allow you to define which CU\*BASE loan products correspond to incoming DealerTrack loan applications, including free-form text for stipulations to be communicated back to an automotive dealer via the DealerTrack software.

### General Information

#### Loan Delivery Channel Configuration (Tool #462)

Delivery Channel / Description		Branch	B	Interviewer/Underwriter	Model Approved	Model Failed	Requirements Failed	Incomplete Application	Amort Flag
BH	Beths Auto House (RD)	01		92					Y
CD	CD	01		AA					Y
CU	CU*BASE	01							Y
DL	DILLS	01		DL					Y
DT	DEALER TRACK	01		04	AA	FR	FR		N
FM	FANNIE MAE	01		89					N
HB	ONLINE BANKING	99		96	HA	HB	HB	HI	Y
LS	LST	01		01					Y
ML	MERIDIANLINK	01		ML					N
PA	MORTGAGE CADENCE	01		T1					Y
RD	RETAILER DIRECT	09		RD					Y
RO	ROUTEONE	01		89					Y
SI	SVNC 1	01		89					N
TC	TCI	01		TC					Y
XT	XTEND CALL CENTER	01		93	AA	FR	FR	FR	Y

This is the first of several screens used to configure default settings used by loan delivery channels. In this context, a Delivery Channel is simply a source of loan applications funneled from any source into the CU\*BASE loan application database.

For details, refer to the booklet, [Online Credit Bureau Access and 247 Lender: Configuring 247 Lender and the Approval Matrix.](#)

#### Close-Up View of the Entry Screen

Delivery Channel / Description		Branch	B	Interviewer/Underwriter	Model Approved	Model Failed	Requirements Failed	Incomplete Application	Amort Flag
BH	Beths Auto House (RD)	01		92					Y
CU	CU*BASE	01							Y
DL	DILLS	01		DL					Y
DT	DEALER TRACK	01		04	AA	FR	FR		Y

Select the delivery channel and Change or View to move to the detail screen.

All incoming applications will be assigned to this branch.

### Detail Screen (Screen 2)

It is recommended that you use a non-employee user ID as this is only used for the Interviewer ID.

If you have a decision model, these codes are automatically assigned to the incoming app loan based on the decision results. **NOT USED FOR R2B**

Check this box if no credit report is needed.

Check this box if the loan should use the GOLD amortization calculations.

- TIP: Always assign your delivery channel to branch 01
- TIP: It's a good idea to create an employee ID for this process called "S1 Sync 1" or "ML MeridianLink." This way you can set up a user that does not have menu security assigned to it. (In the comment line in the security screen add that there is no menu access. This is helpful for auditors. (Lender\*VP will handle the initial creation and consult you on which ID to be used)

After using Enter you will advance to this second detail screen.

### Second Detail Screen (Screen 3)

These are all the loan types you could potentially see coming in from this channel. (What appears on this screen is dependent by vendor.)

Select the loan type and Change to attach the loan product.

## CONFIGURING LOAN PRODUCTS FOR INDIRECT CHANNELS

**Loan Product Configuration (Tool 470), Select a Loan Product, and then “General Loan Information”**

Check the box next to “External loan delivery channels” if you want this product to be available for one or more of your delivery channels.

Purpose Code, Security Code, and Delinquency Code will default from the CU\*BASE product information

Product # 002 NEW VEHICLE 72 MONTHS

Loan category 14 NEW VEHICLES Low 1.890

Corp ID 01 High 25.000

Use application workflow style 001 (blank = standard)

Product code base rate 2.740

Loan fees to be included in modified APR 40.00

Default collections officer XX Miscellaneous coverage on loan

Require Dealer/Indirect ID  Run loan deal filters

Amortization/External Loan Delivery Channel Defaults

Variant 0.000 Rate 0.000 - Or -  Use risk-based pricing

Frequency code M Purpose 01 Delinquency code 3 Variable rate code 000

# of payments 72 Security code 02 Collateral type R ECOA code 1

Loan Quoter Defaults

Quote multiple payments  Payment in final Loan type  Balloon  Lgase  General

Variant 0.000 + - Rate 2.740 Rate var + 0.500 - 0.000

# of payments and frequency A) 072 M B) 063 M C) 051 M

Amortization term for balloon loans A) 000 B) 000 C) 000

Recalculate

Rate History

FR (3272) 1/15/18

- TIP: Loan products can even be set up exclusively for use by external delivery channels.
- When discussing which products, you plan to offer with your LOS vendor pay close attention to purpose/security, if you offer multiple products under the same category and are looking to condense your product offering with the vendor.
  - Example Used Auto 24-48 Months and Used Auto 49-60 Months. Do the purpose and security match?

# CONFIGURING DEALERS IN CU\*BASE

In addition to setting up loan delivery channels, you will also have the option to configure dealers in CU\*BASE to be used for the traditional indirect applications imported from your LOS software.

## Configure Dealer Info for Indirect Lend. (Tool #245)

Session 0 CU\*BASE GOLD - TEST CREDIT UNION  
File Edit Tools Help

### Indirect Dealers

Corp ID

Position to dealer ID

- Or -

Company name

ID	Company Name	ID	Company Name
0001	M & M DODGE		
0005	CHEVY DEALER		
0100	DEALER FORD		
0123	DEALER MERCEDEZ		
1234	ABCD INDIRECT DEALER		

Change Suspend Change Suspend  
Delete Delete Delete

Add  
Show Inactive

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This is the first of two screens used to set up dealer information, including name and address, contact information, and reserve percentages. Each dealer is assigned a unique number for tracking purposes.

- From here you can add or change a dealer. This will take you to the screen shown on the following screen.
- You can suspend a dealer. To then show the suspended dealer, use the Show Inactive (F11) button.
- If you elect to delete a dealer and loans exist with the dealer, a window will appear for you to enter a replacement dealer.

## Configuring Indirect Dealer Information (Detail)

Session 0 CU\*BASE GOLD Edition - TEST CREDIT UNION  
File Edit Tools Help

### Indirect Dealers CHANGE

Scan e-Document  
Imaging Solutions

Corp ID: 1  
Dealer #: 1  
Company name: M & M DODGE  
Description: M & M DODGE  
Address 1: 123 W MAIN  
Address 2:   
City: ANYCITY  
State: MI  
ZIP/postal code: 11111 0000

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Contact name: SAN SMITH  
Contact phone: 5555555555  
Fax phone: 5555555555

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Reserve %: 1.250  
Default reserve amortization term: 24

Navigation icons: < > ↑ || 🖨️ 🔗 ⓘ ? @

WU (2263) 9/17/18

This is the second screen used to add or modify dealer information. In addition to name and address information, this screen is also used to record the reserve percentage allotted for this dealer. Each loan amount that is attached to this dealer will be multiplied by this percentage to calculate the reserve amount.

Below is a description of the fields used to calculate the reserve percentage and monthly reserve expense. *All fields are optional, except for the Dealer # and Company Name.*

Field	Description
Reserve %	(Optional) This field is used to record the reserve percentage allotted for this dealer. Enter an amount using <i>three</i> places past the decimal point. All loans attached to this dealer will be multiplied by this percentage to calculate the reserve amount.  For example, if this dealer receives a reserve of 1.25% for each loan sold to the credit union, enter 01250 here (as shown above.)
Default reserve amortization term	(Optional) Used for calculating the monthly reserve expense when the loan is linked to a dealer but can be overridden at the loan level. This field is not required and can be added when the loan is linked to the dealer.



# WORKING WITH LOAN APPLICATIONS FROM EXTERNAL DEALERS

Just like any loan request, the loan request from the LOS system appears in the Loan Request Queue.

## Loan Request Queue

The DC column will indicate where the application came from.

App #	Applicant Name	App Date/Time	DC	Decision	Int	ID	Action
218093	NonMbr	Aug 30, 2016 15:37	CU	Fail Fltr	89		Model-Requested
218095		Aug 29, 2016 14:12	CU	Rvw Deal	92		
218084		Aug 22, 2016 10:08	CU	Rvw Deal	89		
218082		Aug 16, 2016 11:53	CU	Pass Dcsn	92		Model-Requested
218079		Jul 26, 2016 02:05	HB	Fail	96	MN	SUBMIT - MSO/MSR
218080		Jul 26, 2016 04:17	HB	Fail	96	96	SUBMIT - MSO/MSR
218039		Jul 25, 2016 15:56	DI	Fail Fltr	55	55	PENDING- NEED INFO
218000		Jul 25, 2016 09:04	CU	Fail Deal	TR	TR	PENDING- NEED INFO
217904		Jul 25, 2016 10:17	CU	Fail Deal	60		Model-Requested
218056		Jul 25, 2016 17:07	CU	Fail Fltr	14	14	PENDING- NEED INFO
217935		Jul 25, 2016 11:33	HB	Pass Deal	SH	LK	APPROVED

Key Activity Tracking

SUBMIT - UNDERWRITER	SUBMIT - MSO/MSR	3	DEALERTRACK	2
SUBMIT - LOAN REVIEW	HOME BANKING REQUEST	3	RETAILER DIRECT	

## Identifying Loans from the LOS Software

You can identify it as an indirect loan request because the DC column contains the two-letter indicator for the vendor. If you vendor does not support online banking applications, you may still get applications from Online Banking. There may also be loan types that are not supported through the vendor software such as Mortgages or Business Loans.

## BOOKING THE LOAN

Once the loan is submitted by the vendor, it will appear in your loan queue. You will work it as any other loan application. Following are directions for what you will do when you book these special kinds of loan applications.

### Loan Application – Loan Request Recap Screen

Session 0 CU\*BASE GOLD - TEST CREDIT UNION  
File Edit Tools Help

**Loan Request Recap** Application # 40841

Account base 17956 JOHN Q MEMBER Clear App Data

Loan category 19 NEW AUTO INDIR App created YES

Loan product 103 NEW AUTO INDIRECT 60 MONTHS App date Nov 26, 2018

Account open reason code

Processing Details		Payment Summary	
Disbursement date	Nov 26, 2018	Amount requested	30,000.00
First payment date	Dec 26, 2018	Total amount financed	30,000.00
Maturity date	Nov 26, 2024	+ Total finance charges	0.00
Amort term date		+ Total CDI premiums	0.00
Frequency	MONTHLY	+ Total SCL premiums	0.00
Payment	0.00	+ Total JCL premiums	0.00
Final payment	0.00	Total amount in payments	30,000.00
# of payments	072	Misc coverages in loan	0.00
Interest rate	2.000 %	Other misc coverages	0.00
Modified APR	2.000 %		
Loan fees to include in modified APR	0.00		
Dealer/Indirect ID	ABCD INDIRECT		

Code AA APPROVED  Deal filter run  
 ID 04 BETH  
 PW (Control On)

WU (5122) 11/29/18

At this point you are ready to book the loan. From the Loan Request Recap screen select Create Loan Account as usual. This will take you to the Loan Creation screen.

*Note: Any modifications made to the application in CU\*BASE will trigger the loan to amortize using CU\*BASE calculations. This includes but is not limited to changes to insurance, payment amount, number of payments, interest rate, ECOA code.*

## Loan Creation Screen

Session 0 CU\*BASE GOLD Edition - TEST CREDIT UNION  
File Edit Tools Help

### Loan Creation

Loan account # 17956 JOHN Q MEMBER  
Loan category 19 NEW AUTO INDIR  
Application # 40833  
Co-borrower  
Open date Nov 29, 2018  
Account open reason code

Printer NC070  
Drawer 2

#### Note Information

Assign account type 716 Low 710 High 719  
 Include in open-end loan contract

Approval ID 04 Collector ID Interviewer ID 04  
File verification date Dec 19, 2018 [MMDDYYYY] Credit report # (Primary borrower) CU risk level

*i* If a recent credit report exists for this member, the Credit report # and CU risk level fields will be filled in automatically, using the most recent report on file for the primary borrower. This links the report to this loan so that it will be archived and available for viewing throughout the life of the loan. Any additional signers on this loan will also be linked to the most recent credit report in their name, if one exists in the file.

#### Additional Information

Collateral  Link to dealer  Additional signers  Variable rate loan  Account nickname  
 Automatic transfer  Participation loan  Payment matrix  Credit card maintenance  
 Payroll deduction  Disburse funds  Pledged shares  ACH maintenance

Selected forms: [Select](#) selected

Unlock Fields View Credit Report

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If the application was a traditional indirect like the example above, you can create the dealer link if needed. The link is not required for applications coming directly from your institution.

Complete any additional items required for the loan as you would for any account creation.

When you first come to the *Link Dealer to Member Account* screen (shown below), the *Reserve %* and *Reserve Amortization term* fields will be blank. Select a dealer and if they are configured in the dealer configuration, you can use Enter to fill in the *Reserve %* and *Reserve amortization term*. You can also manually enter this information.

- You can override the default *Reserve %* and *Reserve Amortization term*. In this case click *Recalc Reserve Amt* (lower right button) to recalculate the *Reserve amount*.

Select whether this is a dealer loan or dealer lease with the *Dealer Relationship type* selections.

### Link Dealer to Member Account Screen

The screenshot shows the 'Link Dealers to Member Account' screen. The window title is 'Session 0 CU\*BASE GOLD - TEST CREDIT UNION'. The screen has a blue header with the title and an 'ADD' button. Below the header, there are input fields for 'Account #' (17956), 'Dealer ID' (1234), and 'Closed sequence #' (0). There are radio buttons for 'Dealer relationship type' with 'Dealer loan' selected. Other fields include 'Original loan amount' (.00), 'Reserve %' (3.000), 'Reserve amortization term' (36), and 'Reserve amount' (0.00). A 'Comment' field is present below these. At the bottom, there are buttons for 'Save/Update', 'Unlock Fields', and 'Recalc Reserve Amt'. A status bar at the very bottom contains navigation icons and the text 'WU (6631) 11/29/18'.

The loan is now linked to the dealer. Now use *Save/Update* (F5) to move to the disbursement screen.

## Loan Disbursement Screen (Upon Entry)

Session 0 CU\*BASE GOLD - TEST CREDIT UNION  
File Edit Tools Help

### Loan Disbursement

Account 17956-719 JOHN Q MEMBER SSN/TIN [REDACTED]

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**Loan Details**

Category 19 NEW AUTO INDIR Opened Nov 29, 2018  
 Security 04 NEW CAR Matures Nov 26, 2024  
 Purpose 02 AUTO Disbursement limit 30,000.00  
 Process type E CONSUMER LOAN/CLOSED Total disbursed 0.00

Disbursed by	Amount	Account/Check #	IRA/HSA	Session Totals
Cash	0.00			Cash 0.00
CU check	0.00			C/U check 0.00
Member transfer	0.00	000000000 000	<input type="checkbox"/>	Draft payable 0.00
G/L transfer	0.00	Code  or G/L acct		Member transfer 0.00
				G/L transfer 0.00
				<b>Net available 30,000.00</b>

Pay to the order of JOHN MEMBER Remitter MEMBER JOHN

123 MAIN STREET  
 APT 11  
 ANYCITY MI 12345 7890

New Account  
 Misc Accounting Checks  
 Pay To Dealer

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Upon entry, the Loan Disbursement screen displays the loan information and allows you to disburse to the member. To select the dealer as the payee, select *Pay To Dealer* (button lower left). A pop-up window appears showing a list of dealers configured on the system. Select a dealer from the list, and the dealer information will populate the *Pay to the order of* section of the screen.

## Loan Disbursement Screen (Dealer Pay to Information Included)

Session 0 CU\*BASE GOLD - TEST CREDIT UNION  
File Edit Tools Help

### Loan Disbursement

Account 17956-719 JOHN Q MEMBER SSN/TIN [REDACTED]

---

**Loan Details**

Category 19 NEW AUTO INDIR Opened Nov 29, 2018  
 Security 04 NEW CAR Matures Nov 26, 2024  
 Purpose 02 AUTO Disbursement limit 30,000.00  
 Process type E CONSUMER LOAN/CLOSED Total disbursed 0.00

Disbursed by	Amount	Account/Check #	IRA/HSA	Session Totals
Cash	0.00			Cash 0.00
CU check	0.00			C/U check 0.00
Member transfer	0.00	000000000 000	<input type="checkbox"/>	Draft payable 0.00
G/L transfer	0.00	Code  or G/L acct		Member transfer 0.00
				G/L transfer 0.00
				<b>Net available 30,000.00</b>

Pay to the order of M & M DODGE Remitter MEMBER JOHN

123 W MAIN  
 KALAMAZOO MI 11111 1000

New Account  
 Misc Accounting Checks  
 Pay To Dealer

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## Loan Disbursement Screen (Check Amount Entered)

Session 0 CU\*BASE GOLD - TEST CREDIT UNION  
File Edit Tools Help

### Loan Disbursement

Account 17956-719 JOHN Q MEMBER SSN/TIN [REDACTED]

**Loan Details**

Category 19 NEW AUTO INDIR Opened Nov 29, 2010  
 Security 04 NEW CAR Matures Nov 26, 2024  
 Purpose 02 AUTO Disbursement limit 30,000.00  
 Process type E CONSUMER LOAN/CLOSED Total disbursed 0.00

Disbursed by	Amount	Account/Check #	IRA/HSA	Session Totals
Cash	0.00			Cash 0.00
CU check	25,000.00			C/U check 0.00
Member transfer	0.00	000000000 000	<input type="checkbox"/>	Draft payable 0.00
G/L transfer	0.00	Code <input type="checkbox"/> or G/L acct <input type="checkbox"/>		Member transfer 0.00
				G/L transfer 0.00
				Net available 30,000.00

Pay to the order of M & M DODGE Remitter MEMBER JOHN  
 123 W MAIN  
 KALAMAZOO MI 11111 1000

New Account  
 Misc Accounting Checks  
 Pay To Dealer

← → ↑ || ? @ WU (5302) 11/29/18

Enter the amount of the check in the *CU Check* field and use Enter. An OFAC scan will be run.

## OFAC Scan

Session 0 CU\*BASE GOLD Edition - TEST CREDIT UNION  
File Edit Tools Help

### OFAC Name Breakdown

Entered name M & M DODGE  
 First name M  
 Middle initial &  
 Last name M DODGE

**Countries on Suspect List**

Country ID	Country Name
	BALKANS
	BRITAIN
	DARFUR
BY	BELARUS
CD	DEMOCRATIC REPUBLIC OF THE CONGO
CI	COTE D'IVOIRE
CU	CUBA
IQ	IRAQ

To properly perform the OFAC scan, please break the entered name down into first name, middle initial (if applicable), and last name. The first and last name fields are required.

Organization Account  
 Continue

← → ↑ || ? @ WU (3065) 11/29/18

Complete the OFAC scan, and then use Cancel (up arrow). The check will print at your check printer.

# LINKING INDIRECT LOANS

You can view your indirect loans in a dashboard format, where they can be viewed, updated or deleted.

## Tool #438 Link/View Member Loans

Session 0 CU\*BASE GOLD - SUCCESS CREDIT UNION

File Edit Tools Help

### Indirect Loan Dashboard

Corp ID  Dealer  selected Dealer relationship type  Dealer loan  Dealer lease

Account #  Loan category  selected

Account #	Dealer	Name	Current Balance	Interest Rate	Date Opened	Reserve Amount	Amort Term	Cmts	Closed
2 790 A 200			.00	4.250	Oct 12, 2010	1,205.00	360	Y	W
7 705 A 200		ENNIS	.00	3.625	Oct 18, 2010	.00			W
1 610 A 35		HE	26,829.04	4.740	Oct 06, 2017	.00			
3 715 A 200		MAN	66,666.53	5.000	Jun 28, 2013	.00			
3 605 A 18			9,042.62	2.490	Oct 20, 2015	396.79	72	Y	W
5 790 A 200		STEVEN	106,116.07	3.875	Nov 04, 2013	.00			
7 790 A 200		RLES	63,119.46	4.500	Apr 03, 2014	.00			
5 046 A 200		EL	.00		Jul 18, 2013	.00			
1 605 A 35		KENNETH	16,151.43	2.490	Dec 05, 2015	.00			
1 705 A 200		GARY	158,267.04	3.625	Jun 08, 2016	.00			
5 705 A 200		RALD	38,537.05	5.000	Sep 07, 2016	.00			
5 046 A 200			42,645.30		Mar 22, 2017	.00			
5 605 A 35		JHN	8,320.11	2.490	May 11, 2015	.00			
3 046 A 200		EN	14,797.28		Nov 01, 2017	.00			
1 610 A 34		AK	.00	6.000	Mar 22, 2017	.00			W
1 605 A 35		HAEL	30,058.64	2.250	Nov 23, 2015	.00			W
1 790 A 200		HAEL	.00	2.625	Feb 25, 2013	.00			W
5 705 A 200			.00	4.000	Dec 09, 2015	.00			W
5 611 A 35		IMOTHY	.00	2.490	Apr 27, 2016	.00			W

Total balance 401,881,342.42

F6 (5215) 5/01/18

This screen is used to attach individual member loan accounts to a specific dealer. When reserve amounts are calculated, all loan accounts which have been linked using this screen will be included in the total reserve for that dealer.

To link a loan use Add/Link (F6). This will reveal a pop-up window that will allow you to link the loan. When done, use Save/Update (F5) to return to this dashboard.

- There are two views for this screen: one showing current balance information and the other showing disbursement limit. Use the toggle (F10) to change what is displayed in the column.
- If you see a W in the Closed column, this means that the loan has been written off. If you see a C in the Closed column, this means that the loan has been closed.
- NOTE: This functionality is allowed only for closed end loans.