

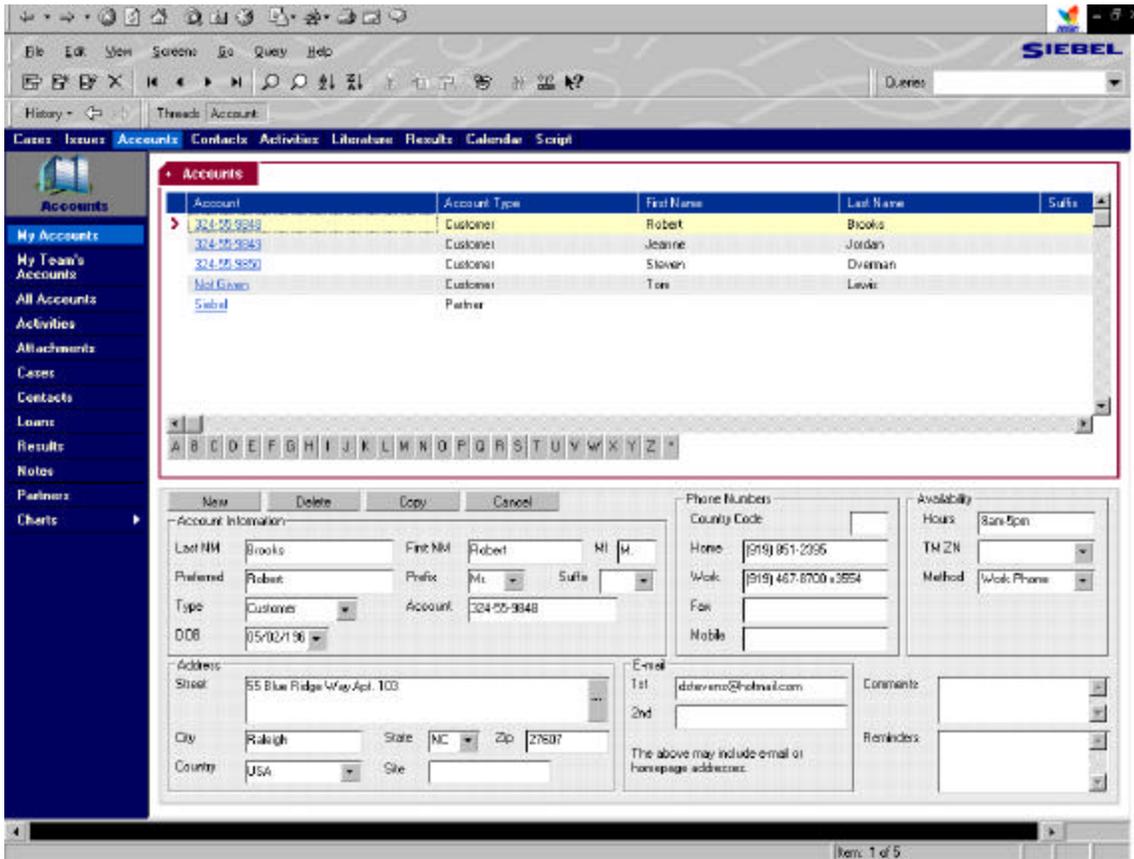
**Screen Description:**

The Accounts Screen contains twelve views that are dedicated to entering, displaying, and using account data. The first three views focus specifically on account information. The rest of the views provide the ability to create activities related to specific accounts, attach files such as customer documentation to the account, view cases associated with the account, view contacts associated with the account view loans associated with the account, gain access to the system encyclopedia, create notes about an account, view Partner Accounts, and monitor case metrics via the charts section.

Following is a list of the views that comprise the Account Screen. More details for each view are available in the subsequent pages of this document.

- My Accounts
- My Team's Accounts
- All Accounts
- Activities
- Attachments
- Cases
- Contacts
- Loans
- Results
- Notes
- Partners
- Charts

# My Accounts View



## View Description:

This view's primary purpose is to allow quick searches for specific accounts for the individual user, to display full details for a particular activity while viewing a list of his/her accounts, and for the user to enter a new activity.

### **OCTS Account List Applet:** *top half of view*

The list applet allows the user to scroll through a list of all accounts, or to select a subset of accounts to view by using the query feature. To facilitate efficient work on an account, hyperlinks in some fields provide quick navigation to a different screen/view to provide detailed case information.

For a detailed data mapping please refer to Appendix B-5

### **OCTS Account Form Applet:** *bottom half of view*

The form applet displays all pertinent account information for a given account in a single, scroll-free display. The data displayed is that of the active account in the list applet above (the selected account with the red arrow in left-most column). A "New" button quickly creates a new account, and the form applet provides an intuitive, efficient method of account data entry.

For a detailed data mapping please refer to Appendix B-6

