Setting Up and Retrieving Data from RLSS Optional Fields

Do you need to track additional information for your loans that is not part of the standard Loan Master programming? This additional information might be the date the client needs to update their financial statements or proof of insurance, date of interest rate change or the date more coupons need to be printed for the client, their UCC Code, the jurisdiction they are in, or codes to be included in the credit bureau report, and so forth. If yes, Optional Fields will allow you to do this. By using Optional Fields, you may customize the software to meet your agency's reporting or monitoring needs.

To begin using Optional Fields, select Tools, Optional Master Fields. Select New, type in the Description of the item you wish to track. Click on Type to select whether the response will be Text, Date, or Number. Click on Save. This field is now ready to be used to enter the response that applies to your individual loans.

Next, select Loan Master and find the loan you wish to complete the Optional Field(s) for. Once the loan is on the screen, click on the Optional Field Details button (yellow paper with red push pin icon) at the top of the screen. Locate the Description you wish to edit and click on the Data column for that row. Enter your response and then move your cursor from that field to another box. Continue this process for all fields needing information entered and when completed, click on Save.

Once you've entered data in the Optional Field Details for your loans, you may then create your own customized reports by using Master Query. Because Optional Fields and the data within those fields are held in a separate table within the database, using Master Query and Optional Fields requires some special processing.

In the combo box under step 1 (search criteria) in Master Query, you will find a listing for "Optional Fields". When you select Optional Fields and tap enter, a display will show all of the optional fields in your database. Select the one you wish to search for specific data. Then go to step 2 and enter the specific data within that field you want to find.

When additional search criteria are desired, and the screen prompts "Do you wish to make more selections", click on "Yes", and repeat steps 1 and 2 for any additional criteria.

In step 3, select both "Optional Fields" and "Optional Fields Data" by holding down on the Crtl key as you click on them. This will result in both the Optional Field Title and the data within that field (as selected in step 1) showing on the report.

A good example of this process would be an optional field titled "Financial Y/N", established as a text field. Data entry would then provide opportunity to enter a Yes or No response to assist with tracking which borrowers are responsible for submitting financial reports. A report could be pulled listing the loans that have "Yes" within the field by taking the following steps:

Select "Optional Fields" from combo box in step 1.
Select "Financial Y/N" from the accompanying combo box and tap enter.

Select “Equal to” in step 2, and enter the response you are looking for (Yes or Y, depending on your method of data entry).
When prompted for further selections, respond “No”. Select both “Optional Fields” and “Optional Fields Data” from combo box in step 3.
Complete steps 4 and 5 as desired.
Confirm Excel is not currently open.
Click on Prepare Report.

When the report is generated in Excel, Optional Fields will be one column, and Optional Fields Data will be listed in the next column. Using Excel features to sort the information within this column will result in a report that is easy to read.

If you need the report to include a date range (example: which loans are due for UCC renewal in September, 2017) in step 1 select Optional Field “UCC Renewal”, tap enter, and then in step 2, enter “greater than” 08/31/17. When prompted “Do you wish to make more selections?” respond “yes”. Repeat step 1 and again select Optional Field “UCC Renewal”, tap enter, and in step 2, enter “less than” 10/01/17. This will result in the program locating loans with UCC Renewal dates from 09/01/17 to 09/30/17. In step 3, be sure to select both “Optional Fields” and “Optional Fields Data”. Additional data may be included by selecting more than those two fields in step 3.

In situations where a range of dates is desired *Quick Date Listings* found on the Features Menu is a good alternative. The data included on the Quick Date Listings report is standardized and cannot be altered. It contains loan number, borrower name, and contact information only.

When a report is desired that reflects data within a multitude of Optional Fields, but it is not necessary to limit the search to specific criteria within those fields, select the fields to be displayed in step #1. To select more than one question, hold down the Ctrl key and click on the desired fields. Tap Enter, and when the cursor moves to step #2, click on the “equal to” indicator, and tap Enter again. When the screen prompts for additional criteria, select “no”. Proceed to step #3, and select Optional Fields and Optional Fields Data. The resulting report will include all of the data within the selected Optional Fields.

Important Note: If search criteria is to include data found within Optional Fields along with other data, such as loan amount, it is important that the data that is not connected to an Optional Field be chosen prior to selecting from the Optional Fields.