



## System Settings | PDF Documents



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## PDF ADMINISTRATION

### Overview

VIEW has the ability to add custom credit union forms that will populate with member information. PDF documents give the credit union flexibility to view and save the documents before printing. The forms that can be added to the system must be a fillable PDF with associated tagged fields. There are several document types with field definition based on the document type.

The following document types are currently available:

- Adverse Action
- Certificate
- Collection
- Credit Bureau
- Debt Protection
- Loan Application
- Loan Document
- Loan Extension
- Membership
- Name and Address
- Notice of Right to Cancel
- Open End Plan
- Safe Deposit Box
- Stop Payment
- Subsequent Action

## Getting Started

### Third Party Setup

There are many third-party vendors that offer credit union forms such as their Credit Union League, CUNA, and Oak Tree Business Systems, Inc. Many credit unions use CUNA LoanLiner® forms for all their loan documents. Another option is convert Microsoft Word documents into fillable PDFs. Some credit union have Adobe Acrobat or another software solution to convert PDFs to fillable PDFs, others have Datamatic convert these documents for them.

### Hardware Setup

No additional hardware is needed.

### Teller Security

PDF Document security is required for staff that will create the documents in VIEW. [[Main Ribbon > System Settings > Tellers > System Tab > Document Administration](#)].

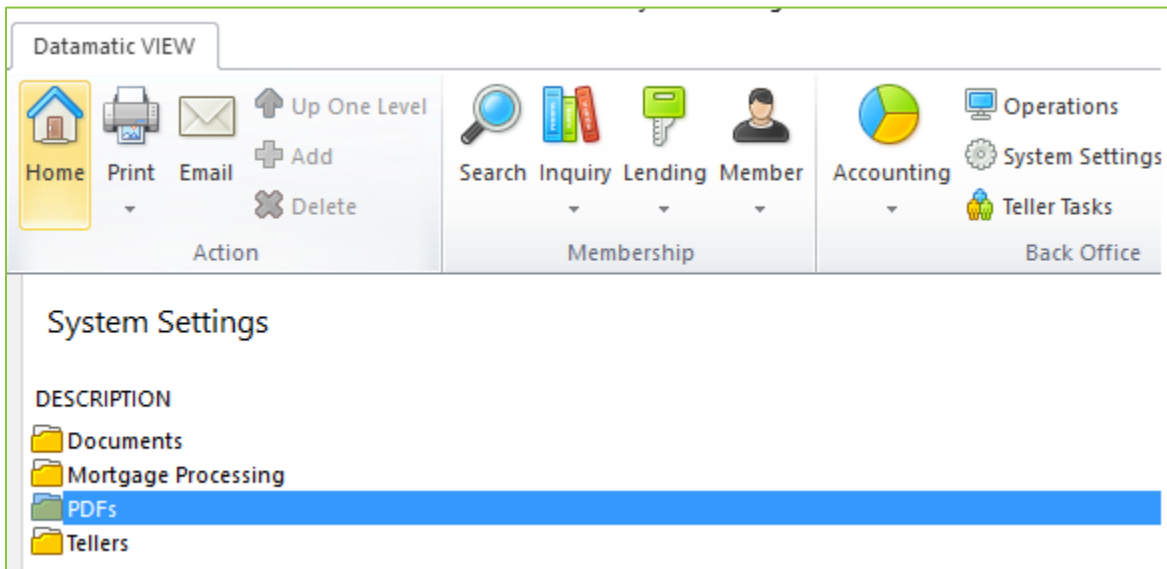
Security to access member documents in VIEW is based on the normal teller security.

### Setup Screens

Each fillable PDF needs to be added using the PDF selection in System Settings.

## PDFs

This document will provide instruction for setting up PDFs in VIEW. The PDF selection is located in [\[Main Ribbon > System Settings > PDF\]](#).



Datamatic VIEW

Home | Print | Email | Up One Level | Add | Delete | Action

Search | Inquiry | Lending | Member | Membership

Accounting | Operations | System Settings | Teller Tasks | Back Office

### System Settings

DESCRIPTION

- Documents
- Mortgage Processing
- PDFs**
- Tellers

### System Settings - PDFs

| NAME                                  | ID  | TYPE             | MEMO                 |
|---------------------------------------|-----|------------------|----------------------|
| 01 - New Visa Application             | 19  | Loan Application | Rev 12.31.2018       |
| 02 - New Visa Rate Disclosure         | 50  | Loan Application | Rev 13.30.2016       |
| 03 - New Visa Rate (with no defaults) | 118 | Loan Application | Rev 04.30.2016       |
| ACH Origination Form                  | 97  | Membership       | Rev. ACCU.03.18.2017 |
| ACH Stop Payment                      | 47  | Stop Payment     | Rev TCCU.04.30.2017  |
| Additional Security Agreement         | 153 | Loan Document    | Rev TCCU.05.01.2016  |
| Address Change                        | 16  | Name and Address | REv DCCU.10.15.2012  |

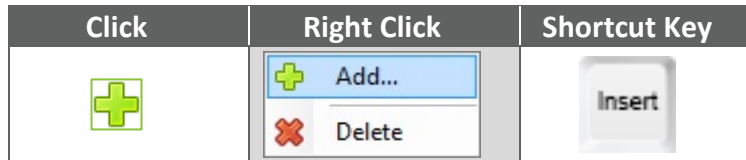
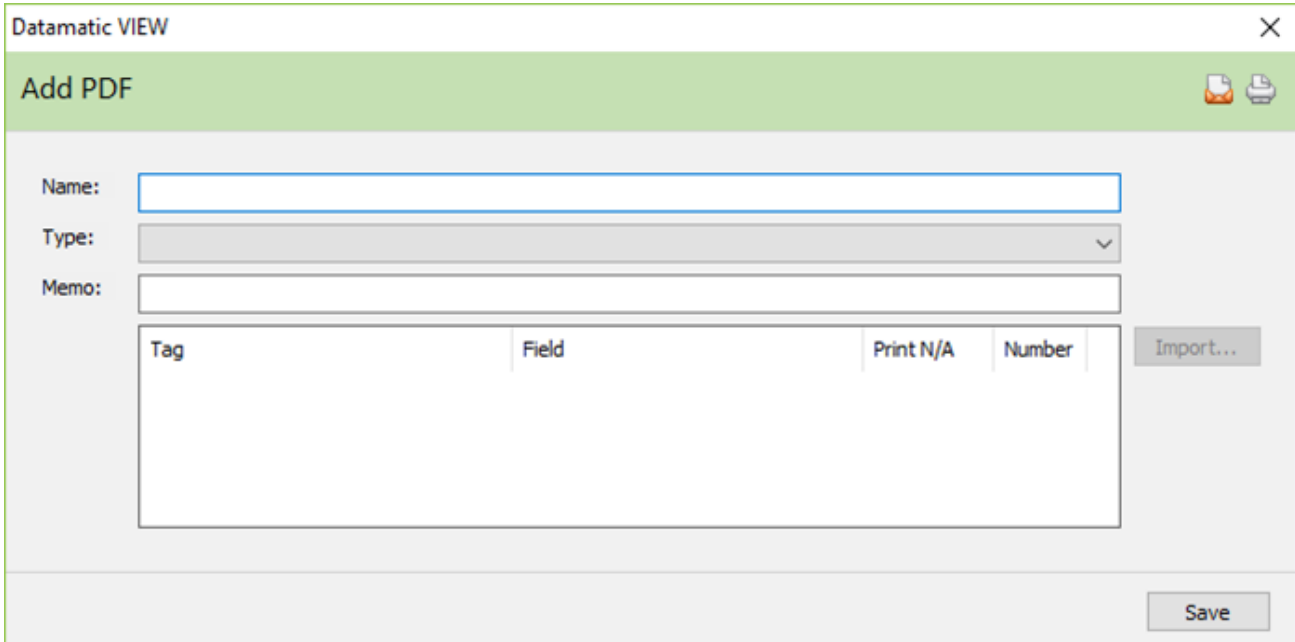


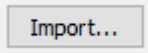
### Note


List order is defined by the PDF sort option [\[Main Ribbon > Tools > Options\]](#).

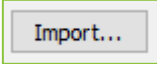
## Add PDF

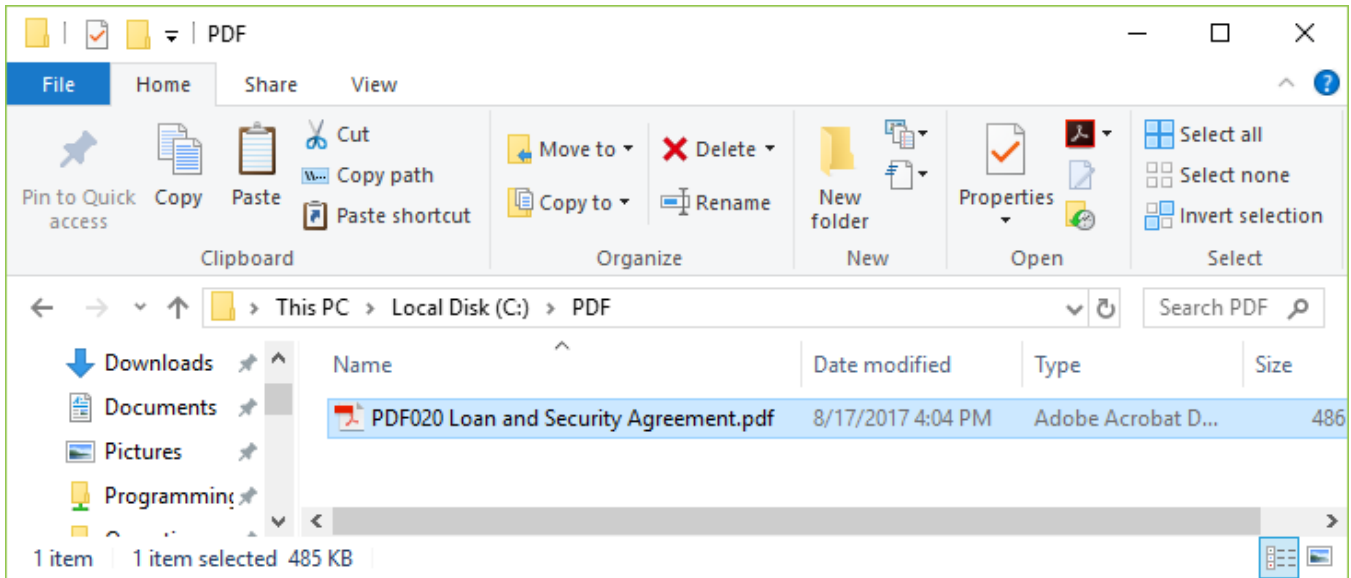
The **Add PDF** screen allows user to create a new PDF document. The screen can be launched by:

| Field   | Comments   |
|---|--|
| <b>Name</b>   | Display Name of Document   |
| <b>Type</b>   | Defines which print fields will be available and which area the document can be printed. |
|   | Adverse Action   |
|   | Certificate  |
|   | Collection   |
|   | Credit Bureau  |
|   | Debt Protection  |
|   | Loan Application   |
|   | Loan Document  |
|   | Loan Extension   |
|   | Membership   |
|   | Name and Address   |
|   | Notice of Right to Cancel  |
|   | Safe Deposit Box   |
|   | Stop Payment   |
|   | Subsequent Action  |
| <b>Memo</b>   | Document description or revision number  |
|  | Enabled after document type is selected. Launches import wizard                          |

| Field   | Comments               |
|---|------------------------|
|  | Email PDF setup screen |
|  | Print PDF setup screen |

Click on Import  after selecting the document type to add the fillable PDF. Select the fillable PDF by browsing to the saved PFD.

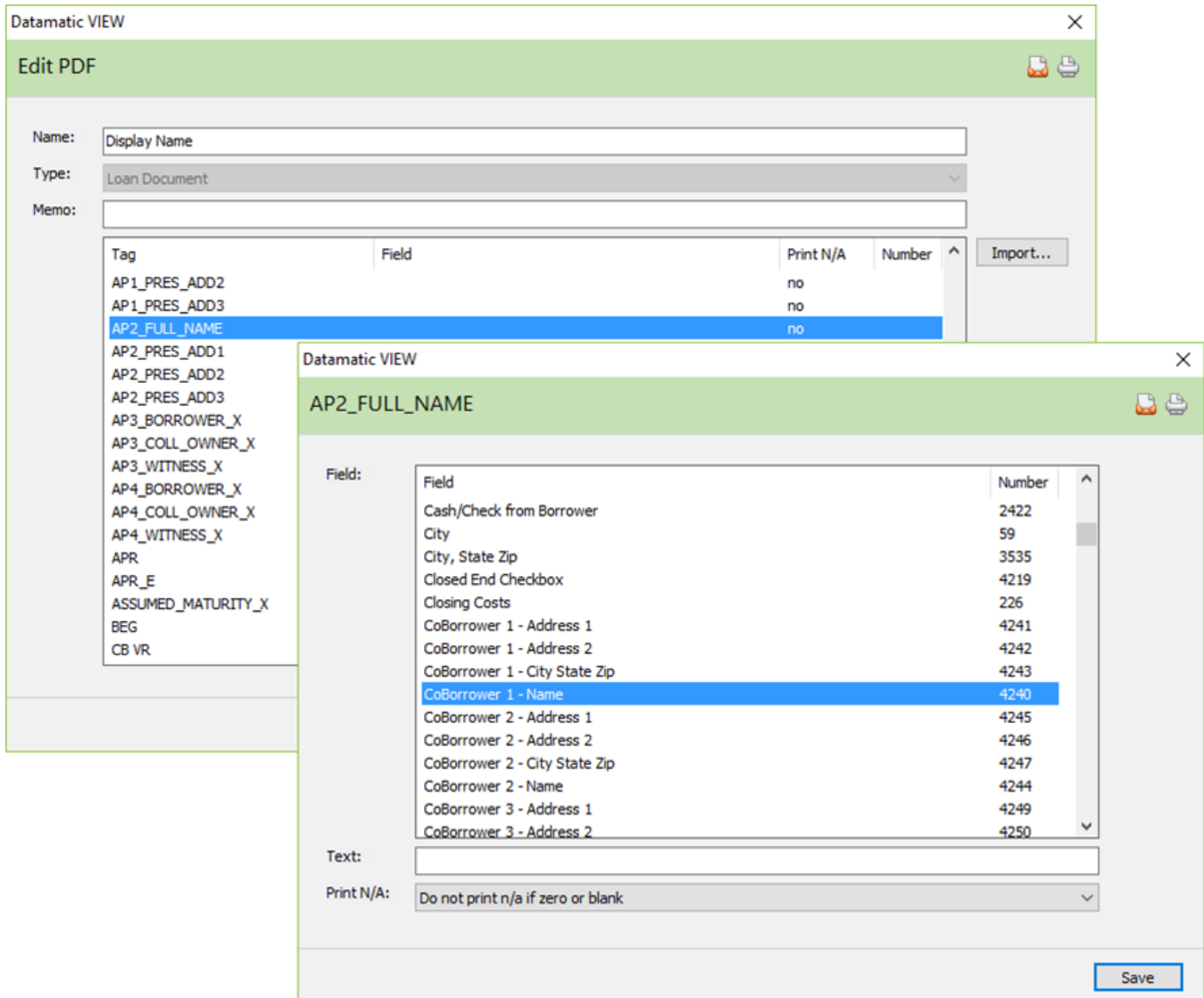


This will import the background of the PDF with all the tagged fields associated with that fillable PDF.

The Tags will be listed on the righthand side of the listview box. To map a VIEW field to the tag, double click on the tag name.

| Tag                | Field | Print N/A | Number |
|--------------------|-------|-----------|--------|
| AP1_PRES_ADD2      |       | no        |        |
| AP1_PRES_ADD3      |       | no        |        |
| AP2_FULL_NAME      |       | no        |        |
| AP2_PRES_ADD1      |       | no        |        |
| AP2_PRES_ADD2      |       | no        |        |
| AP2_PRES_ADD3      |       | no        |        |
| AP3_BORROWER_X     |       | no        |        |
| AP3_COLL_OWNER_X   |       | no        |        |
| AP3_WITNESS_X      |       | no        |        |
| AP4_BORROWER_X     |       | no        |        |
| AP4_COLL_OWNER_X   |       | no        |        |
| AP4_WITNESS_X      |       | no        |        |
| APR                |       | no        |        |
| APR_E              |       | no        |        |
| ASSUMED_MATURITY_X |       | no        |        |
| BEG                |       | no        |        |
| CB VR              |       | no        |        |

Select the VIEW Field from the available list that pertains to the tag and click SAVE.



Datamatic VIEW

Edit PDF

Name: Display Name

Type: Loan Document

Memo:

| Tag                | Field | Print N/A | Number |
|--------------------|-------|-----------|--------|
| AP1_PRES_ADD2      |       | no        |        |
| AP1_PRES_ADD3      |       | no        |        |
| AP2_FULL_NAME      |       | no        |        |
| AP2_PRES_ADD1      |       |           |        |
| AP2_PRES_ADD2      |       |           |        |
| AP2_PRES_ADD3      |       |           |        |
| AP3_BORROWER_X     |       |           |        |
| AP3_COLL_OWNER_X   |       |           |        |
| AP3_WITNESS_X      |       |           |        |
| AP4_BORROWER_X     |       |           |        |
| AP4_COLL_OWNER_X   |       |           |        |
| AP4_WITNESS_X      |       |           |        |
| APR                |       |           |        |
| APR_E              |       |           |        |
| ASSUMED_MATURITY_X |       |           |        |
| BEG                |       |           |        |
| CB VR              |       |           |        |

Datamatic VIEW

AP2\_FULL\_NAME

| Field                         | Number |
|-------------------------------|--------|
| Cash/Check from Borrower      | 2422   |
| City                          | 59     |
| City, State Zip               | 3535   |
| Closed End Checkbox           | 4219   |
| Closing Costs                 | 226    |
| CoBorrower 1 - Address 1      | 4241   |
| CoBorrower 1 - Address 2      | 4242   |
| CoBorrower 1 - City State Zip | 4243   |
| CoBorrower 1 - Name           | 4240   |
| CoBorrower 2 - Address 1      | 4245   |
| CoBorrower 2 - Address 2      | 4246   |
| CoBorrower 2 - City State Zip | 4247   |
| CoBorrower 2 - Name           | 4244   |
| CoBorrower 3 - Address 1      | 4249   |
| CoBorrower 3 - Address 2      | 4250   |

Text:

Print N/A: Do not print n/a if zero or blank

Save

| Column    | Comments   |
|-----------|--|
| Field     | VIEW field name                                      |
| Number    | VIEW field Number (for Datamatic reference only)     |
| Text      | Desired text for fields that need to remain constant |
| Print N/A | Option to Print n/a if zero or blank                 |
|           | Do not print n/a if zero or blank                    |
|           | Print n/a if zero or blank                           |



#### User Tip

To print static text in a field, select the field of (none) and enter the desired text in the Text field




The VIEW field will display in the second column. Continue to map all the fields and then click SAVE.

| Tag                | Field               | Print N/A | Number |
|--------------------|---------------------|-----------|--------|
| AP1_PRES_ADD2      |                     | no        |        |
| AP1_PRES_ADD3      |                     | no        |        |
| AP2_FULL_NAME      | CoBorrower 1 - Name | no        | 4240   |
| AP2_PRES_ADD1      |                     | no        |        |
| AP2_PRES_ADD2      |                     | no        |        |
| AP2_PRES_ADD3      |                     | no        |        |
| AP3_BORROWER_X     |                     | no        |        |
| AP3_COLL_OWNER_X   |                     | no        |        |
| AP3_WITNESS_X      |                     | no        |        |
| AP4_BORROWER_X     |                     | no        |        |
| AP4_COLL_OWNER_X   |                     | no        |        |
| AP4_WITNESS_X      |                     | no        |        |
| APR                |                     | no        |        |
| APR_E              |                     | no        |        |
| ASSUMED_MATURITY_X |                     | no        |        |
| BEG                |                     | no        |        |
| CB VR              |                     | no        |        |



#### Note

Some for Vendors do supply tag field names in subsequent documentation. Some tag field names can be identified by just looking at the form. The software solution that applied the tag fields can also show the tag names.



## Loan and Security Agreements and Disclosure Statement

|   |                      |               |
|---|----------------------|---------------|
| ACCOUNT NUMBER                                  | GROUP POLICY NUMBER  | MATURITY DATE |
| AP1_ACCT_NMBR                                   | 033-00 CONTRACT_NMBR | MATURITY_DT   |
| <b>BORROWER 2</b>                               |                      |               |
| NAME (AND ADDRESS IF DIFFERENT FROM BORROWER 1) |                      |               |
| AP2_FULL_NAME                                   |                      |               |
| AP2_PRES_ADD1                                   |                      |               |
| AP2_PRES_ADD3                                   |                      |               |
| AP2_PRES_ADD2                                   |                      |               |

## Edit PDF

The **Edit PDF Detail** screen allows user to modify information. The screen can be launched by:

| Double Click | Right Click | Shortcut Key |
|--------------|-------------|--------------|
| Item         | None        | Enter        |

Datamatic VIEW ✕

**Edit PDF** 📄 🖨️

Name:

Type:

Memo:

| Tag              | Field               | Print N/A | Number |  |
|------------------|---------------------|-----------|--------|--|
| AMT_OTHER_8      |                     | no        |        |  |
| AMT_OTHER_9      |                     | no        |        |  |
| AMT_PAID         |                     | no        |        |  |
| AMT_PAID_E       |                     | no        |        |  |
| AMTFIN           |                     | no        |        |  |
| AMTFIN_E         |                     | no        |        |  |
| AP1_ACCT_NMBR    |                     | no        |        |  |
| AP1_FULL_NAME    | Name (First Last)   | no        | 54     |  |
| AP1_PRES_ADD1    |                     | no        |        |  |
| AP1_PRES_ADD2    |                     | no        |        |  |
| AP1_PRES_ADD3    |                     | no        |        |  |
| AP2_FULL_NAME    | CoBorrower 1 - Name | no        | 4240   |  |
| AP2_PRES_ADD1    |                     | no        |        |  |
| AP2_PRES_ADD2    |                     | no        |        |  |
| AP2_PRES_ADD3    |                     | no        |        |  |
| AP3_BORROWER_X   |                     | no        |        |  |
| AP3_COLL_OWNER_X |                     | no        |        |  |

[Preview PDF](#)



### Important

When importing a revised fillable PDF make sure to answer YES to replace the PDF and merge it's tags.

VIEW
✕

Are you sure you want to replace the PDF and merge it's tags?



**User Tip**

To preview the PDF click **Preview PDF** link on the lower left.

Name:

Type:

Memo:

| Tag          | Field | Print N/A | Number |  |
|--------------|-------|-----------|--------|--|
| AMT_1_AST    |       | no        |        |  |
| AMT_10_AST   |       | no        |        |  |
| AMT_11_AST   |       | no        |        |  |
| AMT_12_AST   |       | no        |        |  |
| AMT_13_AST   |       | no        |        |  |
| AMT_14_AST   |       | no        |        |  |
| AMT_2_AST    |       | no        |        |  |
| AMT_3_AST    |       | no        |        |  |
| AMT_4_AST    |       | no        |        |  |
| AMT_5_AST    |       | no        |        |  |
| AMT_6_AST    |       | no        |        |  |
| AMT_7_AST    |       | no        |        |  |
| AMT_8_AST    |       | no        |        |  |
| AMT_9_AST    |       | no        |        |  |
| AMT_GIV_DIR  |       | no        |        |  |
| AMT_OTHER_1  |       | no        |        |  |
| AMT_OTHER_10 |       | no        |        |  |

1924.Display Name.pdf - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools Document 1 / 4 100% Sign In

**LOANLINER**

**Loan and Security Agreements and Disclosure Statement**

| FIXED RATE    | LOAN DATE | LOAN NUMBER | ACCOUNT NUMBER | GROUP POLICY NUMBER | MATURITY DATE |
|---------------|-----------|-------------|----------------|---------------------|---------------|
| VARIABLE RATE |           |             |                | 033-0041-9          |               |

| BORROWER 1       | BORROWER 2                                      |
|------------------|---|
| NAME AND ADDRESS | NAME (AND ADDRESS IF DIFFERENT FROM BORROWER 1) |
|                  |   |

**TRUTH IN LENDING DISCLOSURE** 'e' means an estimate

| ANNUAL PERCENTAGE RATE                    | FINANCE CHARGE                              | Amount Financed   | Total of Payments  | Total Sale Price                                |
|---|---|---|--|---|
| The cost of your credit as a yearly rate. | The dollar amount the credit will cost you. | The amount of credit provided to you or on your behalf. | The amount you will have paid after you have made all payments as scheduled. | The total cost of your purchase on credit is \$ |
| %   | \$  | \$  | \$   | which includes your downpayment of \$           |

**Your Payment Schedule Will Be:**

| Number of Payments | Amount of Payments | When Payments Are Due |
|--------------------|--------------------|-----------------------|
|                    | \$                 |                       |
|                    | \$                 |                       |

**Prepayment:** If you pay off early you will not have to pay a penalty.

**Required Deposit:** The Annual Percentage Rate does not take into account your required deposit, if any.

**Demand:**  This obligation has a demand feature. All disclosures are based on an assumed maturity of one year.

| Filing Fees | Non-Filing Insurance |
|-------------|----------------------|
| \$          | \$                   |

**Property Insurance:** You may obtain property insurance from anyone you want that is acceptable to the Credit Union. If you get the insurance from us, you will pay \$


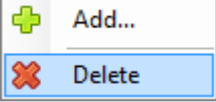
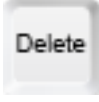
**Late Charge:**  
If your payment is received more than 10 days after the due date, you agree to pay a late fee of 15% of the payment due, with a maximum of \$15.00.

**Security:** Collateral securing other loans with the Credit Union may also secure this loan. You are giving a security interest in your shares and dividends and, if any, your deposits and interest in the Credit Union; and the property described below:

| Collateral | Property/Model/Make | Year | I.D. Number | Type | Value | Key Number |
|------------|---------------------|------|-------------|------|-------|------------|
|            |                     |      |             |      |       |            |

## Delete PDF

PDFs can be deleted by:

| Click   | Right Click   | Shortcut Key  |
|---|---|---|
|  |  |  |