



Address Change Inquiry

AddressChangeInquiry.Menu
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Overview:

This DNAapp allows users to verify if the mailing address of a person or organization was changed in the system within a certain time period. Because of regulations (Red Flag Rule), certain financial institution services such as issuing a new debit card, cannot be offered when an address change has occurred within a set number of days.

Key Benefits:

- Easily query member address history.

Processing:

The app can be accessed through the More menu in the Relationship Profile screen, the Agreements' Access Services screen and the Quick Issue screen on the Person / Member Maintenance. After the user selects the Address Change Inquiry menu item, the application checks activity tables for any changes in the mailing address, phone number or email address (based on the calculation variable ColumnsIncluded) on the selected person or organization. Then a list of those activities within the selected time period will be displayed in the Results section.

The user can choose to change the Thru Date or leave as is (default is today's date). The user can also change the From Date (default is based on the calculation variable NbrDaysHist and Thru Date). For example, if the NbrDaysHist is 30, that means 30 days prior to Thru Date is used for the "From Date". The Query button is disabled until both the From Date and Thru Date are populated. The **Query** button displays a list of address, phone, or email change activities in the Results section. The **Clear** button will Clear the Results, set Thru Date to today's date, and set From Date to number of days (based on the calculation variable NbrDaysHist) prior to Thru Date.

The Thru Date must be greater than or equal to the From Date or else a message will be displayed as "The Thru Date must be greater than or equal to the From Date." If the calculation variable ColumnsIncluded is blank, a message will be displayed as "The calculation variable ColumnsIncluded is not set or has empty value." If coming from the Agreements screen and the user click on the Address Change Inquiry without selecting a person or organization, a message will be displayed as "Please select a person or organization first." If there is no data to display, a message will be showed as "No Information Found."

Authorization:

To grant a user access to this application, the authorization item Activity Inquiry (AVIN) needs to be assigned to an authorization group, such as tellers (TELL), to which the user has at least View and Inquiry access privileges.

The following table lists the AuthItem that is used in the application:

Name	Code	Type	Description (how used)
Activity Inquiry	AVIN	AuthItem	Authorization item for screen and GUI access.

Parameters:

N/A.

Variables:

In order to create these variables in the DNA database, the "ConfigSetup.sql" script must run by the administrator prior to the first run of the application. Only the value of the variables 9R6C to 9R6E can be customized by the financial institution.

Calculation Categories:

A calculation category is required to associate the variables to the application. The following calculation category is used for that purpose.

Calculation Cat Code	Description
9RFC	Custom Category

Calculation Types:

A calculation type is required to associate the variables to the application. The following calculation type is used for that purpose.

Calculation Cat Code	Calculation Type Code	Description (how used)	MjMiYN
9RFC	9R0F	Address Change Inquiry	N

Calculation Variables:

The following calculation variables are required for the application. They are populated within the '9R0F' calculation type.

Variable	Code	Description (how used)	Data Type	Default
NbrDaysHist	9R6C	This is used to calculate the From Date. The set number of days prior to the Thru Date will be the From Date. If null value is defined, the From Date and Thru Date will default to today's date.	STR	30
ColumnsIncluded	9R6D	These are the columns that will be included in the displayed activities. Can be multiple, separated by commas, no spaces. If null value is defined, a message will display the variable is not set or has empty value.	STR	AddrUseCd,Text,CityName,StateCd,ZipCd,CtryCd,PhoneUseCd,AreaCd,Exchange,PhoneNbr,PhoneExten,EmailAddr
InternetBankingName	9R6E	This is the org name in the system used for internet banking. If null value is defined, this variable will not be used.	STR	<Blank>

Scheduling and re-run information (for batch applications):

N/A

Notices:

N/A

Report (s):

N/A

File Layout(s):

N/A

Screens:

See "Screen Appearance" section.

Navigation:

Services > Relationships (Module) > Quick Inquiries > Relationship Profile > More (menu) > Address Change Inquiry

Services > Relationships (Module) > Agreements > Access Services > Address Change Inquiry

Services > Relationships (Module) > Maintenance > Person / Member > Services > Quick Issue > Address Change Inquiry

Screen Appearance

The screenshot shows a web application window titled "Relationship Profile - [redacted]". Below the title bar is a section titled "Address Change Inquiry". Underneath is a "Search Criteria" section with a "Date Selection" sub-section. The "Date Selection" section contains two date pickers: "From Date" set to "11-01-2011" and "Thru Date" set to "04-13-2012". There are "Query" and "Clear" buttons to the right of the date pickers. Below the search criteria is a "Results" section containing a table with the following data:

Activity Date Time	Table	Column	Old Value	New Value	Responsible Person	Business Unit
11-23-2011 11:42:41 AM	Addr	ZipCd				Athens
11-23-2011 11:42:41 AM	AddrLine	Text				Athens
11-23-2011 11:42:41 AM	Addr	CityName				Athens

At the bottom left of the results section is a "Close" button.

Field Listing:

Field	Description
Search Criteria	
From Date	Start date for the activities' activity date to limit the activities being displayed. This is being calculated based on the calculation variable NbrDaysHist and Thru Date. For example, if the NbrDaysHist is 30, that means 30 days prior to the Thru Date is From Date.
Thru Date	Thru date for the activities' activity date to limit the activities being displayed. Default is today's date
Query Button	To display a list of address/phone/email change activities based on the parameters entered
Clear Button	Clear the Results, set the Thru Date to today's date, set the From Date to a set number of days (based on the calculation variable NbrDaysHist) prior to Thru Date.
Results	
Activity Date Time	Date and Time of when the address/phone/email changes were made
Table	The name of the table that was changed with the activity
Column	The name of the column that was changed with the activity
Old Value	The value before the activity
New Value	The value after the activity
Responsible Person	The person responsible for the activity
Business Unit	The business unit where the person is assigned when the activity occurred
Close Button	Close the form

Additional Requirements:

- Fiserv DNA 4.2.2 or higher
- .NET Framework 4.5.2
- RelationshipProfileMoreMenu.dnax must be downloaded from the DNAappstore Community Forum and installed before installing this application

Configuration Checklist:

Item	Test Environment	Production Environment
Variables		

Revisions:

Date	App Version #	Change
09/2016	1.1.0.2	Issues fixed after second validation
08/2016	1.1.0.1	Issues fixed after first validation
07/2016	1.1.0.0	Compiled in DNA SDK 4.2.2 and .Net Framework 4.5.2
05/2012	1.0.1.0	Issues fixed after first validation.
04/2012	1.0.0.0	Application Created.