



Contact Change History

ContactInformationHistory.dnax
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Overview:

The Contact Information History DNAapp displays the history of changes made to Member/Customer Contact information, which includes Address, Email and Phone number.

This application fetches the contact information updates from the Activity tables in the DNA database and parses them to display the historical data for contact information.

Key Benefits:

DNA does not have the capacity to display the history for Contact Information changes (Address, Email and Phone Number) made for the Member/Customer in a centralized and easy to understand format.

This DNAapp allows the FI to view the historical data for the Customer/Member's contact information (Address, Email and Phone) in readable format.

As a security measure, the FI would be able to easily verify if there were any changes in Customer/Member's contact information before processing any critical activity on Customer/Member's account or profile, such as Wire Transfer.

Processing:

The Contact Information History screen can be accessed through the following locations: the 'Quick Inquiries' menu, the 'More' menu under Relationship Profile screen and the 'Additional' menu under Person/Member maintenance and Organization maintenance screens.

This screen fetches the historical data for contact information (Address, Email and Phone number) updates from the Activity tables in DNA database and parses it to display in a tabular format.

Note: The historical data displayed on this screen depends on the data available in DNA Activity tables. If FI is purging the activity data periodically, then the Contact Information History screen displays the data as available in Activity tables in DNA database.

The user can choose to populate the history for Address, Email and Phone Number using the options available on the screen. This screen also provides the option to view the history for a specific Address/Email/Phone type.

The current contact information is displayed in the Current Address/Email/Phone Number field. If current contact information is not setup for the selected contact type, then a message, "No current address/phone number/email exists for the selected type", is displayed in this field.

The historic data is displayed in the Address/Phone Number/Email Changes Details table. The historic data includes: Date Modified, Modified By, Previous Address/Email/Phone Number and Activity. It displays the historical data appropriately based on the option selected.

A Member/Customer can be searched by clicking the 'Search' button, which launches the Search screen in DNA. This feature is only available if the screen is accessed using the 'Quick Inquiries' menu.

A 'Refresh' button is available on the screen to refresh the data on the screen.

Authorization:

Following Authorization Item needs to be assigned to appropriate users to grant access to the screens.

Authorization Item	Code	Description
Contact Information History	COIH	This authorization item provides the access on "Contact Information History" screen.

Screen:

Contact Information History Screen:

A new Screen is added that displays the current information and historical updates made to Member/Customer's contact information, which includes Address, Email and Phone number.

Navigation:

Relationships > Quick Inquiries > Contact Information History

Relationships > Maintenance > Organization > Additional > Contact Information History

Relationships > Maintenance > Person/Member > Additional > Contact Information History

Relationships > Quick Inquiries > Relationship Profile > More > Contact Information History

Screen Appearance:

Contact Information History

Name

Address
 Phone Number
 Email
 Address Type

Current Address

Address Change Details

Date Modified	Modified By	Previous Address	Activity

Field Listing:

Field	Description
Search Criteria	
Name	This field displays the Name of Customer/Member.
Search Button	On click, this button launches the Search screen. The user can select Person or Organization using the Search screen. This button is only available when this screen is accessed via the Quick Inquires > Contact Information History menu.
Refresh Button	On click, this button fetches the data based on the Search criteria and displays it on the screen.

Field	Description
Address	When this option is selected, the current Address information and the Address change history is displayed on the screen. This option is selected by default.
Phone Number	When this option is selected, current Phone Number information and the Phone Number change history is displayed on the screen.
Email	When this option is selected, current email information and the Email change history is displayed on the screen.
Address Type	This dropdown is populated with the Type of different addresses for the Member/Customer. This field is available only if 'Address' option is selected.
Phone Number Type	This dropdown is populated with the Type of different Phone Numbers of the Member/Customer. This field is available only if 'Phone Number' option is selected.
Email Type	This dropdown is populated with the Type of different Emails of the Member/Customer. This field is available only if 'Email' option is selected.
Current Contact Information	
This section displays the current contact information for the Member/Customer, based on the Search criteria.	
Current Address	Displays the current Address for the Member/Customer, based on the selected value in Address Type field. A message, "No current address exists for the selected type", is displayed in this field if no Address exists for the selected Type. This field is available only if 'Address' option is selected.
Current Phone Number	Displays the current Phone Number for the Member/Customer, based on the selected value in Phone Number Type field. A message, "No current phone number exists for the selected type", is displayed in this field if no Phone Number exists for the selected Type. This field is available only if 'Phone Number' option is selected.
Current Email	Displays the current Email for the Member/Customer, based on the selected value in Email Type field. A message, "No current email exists for the selected type", is displayed in this field, if no Email exists for the selected Type. This field is available only if 'Email option is selected.
Changes Details	
This section displays the details of updates made to the Contact Information, like Date Modified, Modified By, Previous value, Activity type.	
Date Modified	Displays the Date and Time, when the update was made.
Modified By	Displays the Name of the person who updated the information.

Field	Description
Previous Address/Phone Number/Email	Displays the information before the changes were made. The Column name changes based on the selected option; Address, Phone Number or Email.
Activity	Displays the Activity performed; Added, Deleted or Updated.
Buttons	
Close	Clicking this button in the bottom left corner of the screen's Processing bar, will close the application.

Additional Requirements:

- Fiserv DNA 4.4.1 or higher
- .NET Framework 4.5.2

Configuration Checklist:

Item	Test Environment	Production Environment
Authorizations		

Revisions:

Date	App Version #	Change
02/2020	1.0.0.0	Application Created