



Contact Inquiry

contact_inquiry.dnax
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Overview:

This DNAapp will provide users with a fast, easy way to review current contact information (address, phone, and email), as well as historical changes for a person or organization made within a specified date range. When a person or organization is searched within this app, the activity will be logged in the DNA activity log. Additionally, there will be an optional feature that will provide a way for the user to confirm if the most recent change of address has been verified.

Disclaimer:

- This app currently does not support:
 - Foreign Phone Numbers
 - Foreign Addresses
- Version
 - DNAapp Version 1.0.0 developed and tested on DNA Version 4.4.2
 - DNAapp Version 2.1.0 developed and tested on DNA Version 4.5.2

Key Benefits:

- Improves member services by accessing contact information changes faster.
- Operational efficiencies:
 - Reduces research time.
 - Produces more accurate results.
 - Reduces policy exceptions.
 - Easy to read information grouped by contact information category.
- One stop to see current and historical contact information on a single screen.

Processing:

One way to access this app is through Quick Inquiries > Contact Inquiry. Once the user has selected the Contact Inquiry DNAapp, the search screen appears (See Figure 1 in Screen Appearance). After a person or organization is entered correctly, the Contact Inquiry DNAapp will display the following information: Current Contact Information, Address Information Change History, Phone Information Change History, and Email Information Change History (See Figure 2).

Date Range:

In Figure 3, there will be a date range. The default date range will be set using the calculation variable “Default Date Range Days.” This example will use the default 30 days. The user will also have the ability to change the desired date range within the app. If the Thru Date is less than the From Date, the following error will display. “The Thru Date must be greater than or equal to the From Date.” If the “Query” or “Search” button is clicked and either the Thru Date, From Date, or both are blank, the date range will be filled in automatically with the set variable “Default Date Range Days.”

Clickable Buttons:

In Figure 3, the user will see the following buttons: Search, Clear, and Query. The Search button will take the user back to the original search screen. The Clear button will remove all information on the current screen. Finally, the Query button will search the current member again. This feature is useful if you change the date range within the app.

Current Contact Information:

Figure 4 displays the current contact information for the member that was entered. On this screen, the user will also see “Address Verified.” This is a read-only field that will be visible by default but can be hidden by changing the variable “Enbl Contact Info Verify.” If the most recent person or organization contact information change happens outside of the set variable “Num Days Since Last Change,” “Address Verified” will display “N/A”. The Financial Institution will be able to set the “Num Days Since Last Change” which specifies the default number of days for which contact information must be verified. Furthermore, the variable named “Verification User Field Code” allows the Financial Institution to specify which User Field Code will be used to state whether the contact information has been verified.

Address, Phone, Email Information Change History:

Figure 5 displays the previous contact information for the person or organization that is being searched.

- Phone Information Change History disclaimer
 - If a phone number is deleted and was inserted into the database outside of the DNA user interface (Ex. Database to database transfer, manual entities, etc.), a series of X’s will be displayed in place of the missing information. See Figure 6.
- Address Information Change History disclaimer
 - If an address is deleted and was inserted into the database outside of the DNA user interface (Ex. Database to database transfer, manual entities, etc.), and there is not enough information in activity history. The address will not be shown.

- Email Information Change History disclaimer
 - If an email address is deleted and was inserted into the database outside of the DNA user interface (Ex. Database to database transfer, manual entities, etc.), and there is not enough information in activity history. The word “Unknown” will display in the table. See Figure 7.

Responsible Person Name:

The responsible person name in the Calculation Variables allows the Financial Institution to make a substitution for a single responsible person number. Under normal operation the DNAapp will show the name of the person who is responsible for each Address, Phone, or Email History record. In some instances, this behavior may be undesirable if the change were to be recorded as a part of an external process using a generic person's DNA Person Number. In these instances, the DNAapp can be instructed to make one of two substitutions based on the value of the Responsible Person Name Calculation Variable. If the Responsible Person for an activity record matches the person number in the Responsible Person Number Calculation Variable, then:

1. If the Responsible Person Name Calculation Variable is the default value of “DEFAULT” then the DNAapp will replace the responsible person with the subject person or organization for which the DNAapp user is looking for contact information to designate that the change was instituted by that person or organization.
2. If the Responsible Person Name Calculation Variable contains *any other value*, then the DNAapp will replace the responsible person with that value instead to designate that the change was instituted by the name present in the Calculation Variable.

This allows Financial Institutions to designate how contact information changes not done by via the DNA system can appear in the DNAapp. If they are recorded by an external process using a certain DNA person account, then that process can be substituted, by name, for the responsible person on record.

Activity Table:

Figure 8 and 9 display the activity log after the user searched for John Doe with this DNAapp.

Authorization:

To grant the user access to this application, the following authorization items need to be assigned to the appropriate authorization group.

Name	Code	Type	Description
Contact Inquiry	CONQ	AuthItem	Contact Inquiry DNAapp
Contact Inquiry Interface	CNQX	AuthItem	Contact Inquiry DNAapp Interface
Core API Request 7711	7711	AuthItem	CAPR 7711
Core API Request 7727	7727	AuthItem	CAPR 7727
Core API Request 7783	7783	AuthItem	CAPR 7783
Core API Request 7789	7789	AuthItem	CAPR 7789

Parameters:

N/A.

Variables:Calculation Categories:

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

Calculation Cat Code	Description
AF01	DNAapp Configuration

Calculation Types:

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

Calculation Type Code	Description
CICT	Contact Inquiry Calc Type

The following calculation variables are required for the application.

Variable	Code	Description (how used)	Data Type	Default
Verification User Field Code	VUFC	Enter the Person or Org User Field Code that will be used to state whether contact information has been verified. The user field code entered here must represent a Y or N type field.	STR	CAD9
Enbl Contact Info Verify	VUFE	Enable or Disable Contact Information Verification checks	YN	Y
Num Days Since Last Change	VUFD	Specify the default number of days within which contact information must be verified before it is considered at risk.	INTG	30
Default Date Range Days	DDRD	Specify the default number of days the DNAapp will use to prefill the from and thru dates fields (see Screenshots)	INTG	30
Responsible Person Number	RSPN	Person Number that will trigger a name replacement. If this person number shows up on search results, it will be replaced with the name of the Active Person in the Active Task.	INTG	1
Responsible Person Enable	RSPE	Enable or Disable if the responsible person field can be replaced with the name of the Active Person. If disabled (N), the responsible person column will be blank (See Figure 10)	YN	Y

Variable	Code	Description (how used)	Data Type	Default
Responsible Person Name	RSPP	Defines the person name to display or if the Active Person's name should display	STR	DEFAULT
Enable Custom Location	CLEN	Enable replacing any instance of "Fiserv" in the search results with another location name	YN	Y
Custom Location Name	CLNA	The name of the location to display instead of "Fiserv"	STR	Online Banking

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

N/A

Notices:

N/A

Report (s):

N/A

File Layout(s):

N/A

Real-time Interaction with Other Applications:

N/A

Screens:

See "Screen Appearance" section

Navigation:

- Quick Inquiries > Contact Inquiry
- Quick Inquiries > Contact Inquiry > Quick Search (Slide out). This feature will allow the user to look up another member quickly without leaving the app.
- Maintenance > Person/Member > Services > Access Services > Contact Inquiry
- Maintenance > Person/Member > Services > Quick Issue > Contact Inquiry
- Maintenance > Organization > Services > Access Services > Contact Inquiry
- Agreements > Access Services > Contact Inquiry
- Person
 - Quick Inquiries > Relationship profile > Edit > Edit Person > Services > Access Services > Contact Inquiry
 - Quick Inquiries > Relationship profile > More > Contact Inquiry
 - Quick Inquiries > Relationship profile > Edit > Edit Person > Services > Quick Issue > Contact Inquiry
- Organization
 - Quick Inquiries > Relationship profile > Edit > Edit Organization > Services > Access Services > Contact Inquiry
 - Quick Inquiries > Relationship profile > More > Contact Inquiry

Screen Appearance:**Figure 1: Search Screen****Search**

Search Criteria

☒ Person ☐ Organization

Last Name/
Organization Name:

First Name:

☐ Phonetic

Tax ID:

Phone Country:

Phone:

☒ Member Number

Member:

Nickname:

Address:

City:

State:

Zip Code:

Country:

☐ Employee Search

Routing Number:

Figure 2: Contact Inquiry**Contact Inquiry**

Search Criteria

From Date

07/16/2019

Thru Date

08/15/2019

Query

Search

Clear

Current Contact Information for John Doe

Address Verified: NO

Activity Date/Time	Information Type	Current Contact Information
08/12/2019 04:05 PM	Primary	123 Main Street, Jacksonville, AR 72076
08/13/2019 10:50 AM	E-Mail Address	john.doe@newemail.com
08/15/2019 11:36 AM	Cellular	(501) 444-5555
08/12/2019 04:05 PM	Home	(501) 333-4444

Address Information Change History

Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/12/2019 4:05 PM	Add Primary		123 Main Street, Jacksonville, AR 72...		IT

Phone Information Change History

Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/15/2019 11:36 AM	Add Cellular		(501)444-5555		IT
8/12/2019 4:05 PM	Add Home		(501)333-4444		IT

Email Information Change History

Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/13/2019 10:50 AM	Update E-Mail Addre...	john.doe_test@test.com	john.doe@newemail.com		IT
8/12/2019 4:36 PM	Delete Business E-M...	john.doe_business@test.com			IT
8/12/2019 4:34 PM	Add E-Mail Address		john.doe_test@test.com		IT
8/12/2019 4:34 PM	Add Business E-Mail		john.doe_business@test.com		IT

Figure 3: Clickable Buttons**Contact Inquiry**

Search Criteria

From Date

07/16/2019

Thru Date

08/15/2019

Query

Search

Clear

Figure 4: Current Contact Information

Current Contact Information for John Doe			Address Verified: NO
Activity Date/Time	Information Type	Current Contact Information	
08/12/2019 04:05 PM	Primary	123 Main Street, Jacksonville, AR 72076	
08/13/2019 10:50 AM	E-Mail Address	johndoe@newemail.com	
08/15/2019 11:36 AM	Cellular	(501) 444-5555	
08/12/2019 04:05 PM	Home	(501) 333-4444	

Figure 5: Address, Phone, Email Information Change History

Address Information Change History					
Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/12/2019 4:05 PM	Add Primary		123 Main Street, Jacksonville, AR 72...		IT
Phone Information Change History					
Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/15/2019 11:36 AM	Add Cellular		(501)444-5555		IT
8/12/2019 4:05 PM	Add Home		(501)333-4444		IT
Email Information Change History					
Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/13/2019 10:50 AM	Update E-Mail Addre...	johndoe_test@test.com	johndoe@newemail.com		IT
8/12/2019 4:36 PM	Delete Business E-M...	johndoe_business@test.com			IT
8/12/2019 4:34 PM	Add E-Mail Address		johndoe_test@test.com		IT
8/12/2019 4:34 PM	Add Business E-Mail		johndoe_business@test.com		IT

Figure 6: Phone Information Change History disclaimer**Clarification**

- In the picture below, the original home number (501) 555-6666 was entered into the database not using the DNA user interface. Next, the home phone was updated to (501) 333-4444, then (501) 111-2222, however (501) did not change. When the home phone was deleted on 8/15/2019 12:18 PM, this DNAapp only shows that changes that are recorded in DNA. Therefore, the (501) that was manually put into the database is now deleted and cannot be referenced resulting in (XXX)111-2222 being deleted.

Phone Information Change History					
Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/15/2019 12:18	Delete Home	(XXX)111-2222			IT
8/15/2019 12:18	Update Home	(XXX)333-4444	(XXX)111-2222		IT
8/15/2019 12:01	Update Home	(XXX)555-6666	(XXX)333-4444		IT

Figure 7: Email Information Change History disclaimer

Email Information Change History					
Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/15/2019 12:42	Delete E-Mail Address	Unknown			IT

Figure 8: Activity Log

Activity					
Activity / Post Date	Activity Time	Responsible Person	Activity Category / Activity Type	Database Activity / Table ID	Activity Number
08-15-2019	11:44:54 AM		Person Inquiry	INQUIRY	
08-15-2019			Relationship Profile	ACCT	

Figure 9: Activity Log Detail

Activity Detail					
Actual Changes for Above Selected Activity					
Database Activity	Table	Column	Old Value	New Value	
INQUIRY	ACCT	DIALOG		Contact Inquiry	
					Approving Person <input type="text"/> Network Node <input type="text"/> Network Node Location <input type="text" value="IT"/> Subject Person <input type="text" value="John Doe"/>

Figure 10: Enable/Disable Responsible Person**Contact Inquiry**

Search Criteria

From Date
Thru Date

Query
Search
Clear

Current Contact Information for John Doe
Address Verified: **NO**

Activity Date/Time	Information Type	Current Contact Information
08/12/2019 04:05 PM	Primary	123 Main Street, Jacksonville, AR 72076
08/13/2019 10:50 AM	E-Mail Address	johndoe@newemail.com
08/15/2019 11:36 AM	Cellular	(501) 444-5555
08/12/2019 04:05 PM	Home	(501) 333-4444

Address Information Change History

Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/12/2019 4:05 PM	Add Primary		123 Main Street, Jacksonville, AR 72...		IT

Phone Information Change History

Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/15/2019 11:36 AM	Add Cellular		(501)444-5555		IT
8/12/2019 4:05 PM	Add Home		(501)333-4444		IT

Email Information Change History

Activity Date/Time	Information Type	Old Value	New Value	Responsible Person	Location
8/13/2019 10:50 AM	Update E-Mail Addre...	johndoe_test@test.com	johndoe@newemail.com		IT
8/12/2019 4:36 PM	Delete Business E-M...	johndoe_business@test.com			IT
8/12/2019 4:34 PM	Add E-Mail Address		johndoe_test@test.com		IT
8/12/2019 4:34 PM	Add Business E-Mail		johndoe_business@test.com		IT

Field Listing:

Field	Description
Search Criteria	
From Date	The earliest point (start date) on which the contact inquiry DNAapp searches and displays.
Thru Date	The latest point (end date) on which the contact inquiry DNAapp searches and displays. The default value will be the current date.
Search Button	The Search button will take the user back to the original Relationship Profile Search screen.
Clear Button	The Clear button will remove all information on the current screen
Query Button	The Query button will search the current member again. This feature is useful if you change the date range within the app.
Current Contact Information Results	
Activity Date/Time	Displays the date last changed
Information Type	Displays the members specific type of contact information for the column "Current Contact Information" Ex. Primary Address, Email, Cellular, etc.
Current Contact Information	Displays the member's information that is currently on file.
Address Verified	Display Yes, No, or N/A if the current mailing address has been verified.
Address, Phone Email Information Change History Results	
Activity Date/Time	Displays the date last changed
Information Type	Displays the members specific type of contact information for the column "Previous Contact Information" Ex. Primary Address, Email, Cellular, etc.
Old Value	The value before the information was changed
New Value	The value after the information is changed
Responsible Person	The responsible person that conducted the change
Location	The department of the person that conducted the change

DNA Branch File Servers:

- If your organization uses DNA Branch File Servers, please place the following .dlls in each DNA Branch File Server.
 - contact_inquiry.Screen.dll
 - contact_inquiry.Business.dll
 - contact_inquiry.SqlProvider.dll

Additional Requirements:

- Fiserv DNA 4.4.1 or higher
- Core API version 2.0.5.3 or higher
- .NET Framework 4.5.2
- RelationshipProfileMoreMenu.dnax must be downloaded from the Fiserv and installed before installing this application

Configuration Checklist:

Variable	Code	Data Type	Test Environment	Production Environment
Verification User Field Code	VUFC	STR		
Enable Contact Info Verification	VUFE	YN		
Number of Days Since Last Change	VUFD	INTG		
Default Date Range Days	DDRD	INTG		
Responsible Person Number	RSPN	INTG		
Responsible Person Enable	RSPE	YN		
Responsible Person Name	RSPN	STR		
Enable Custom Location	CLEN	YN		
Custom Location Name	CLNA	STR		

Revisions

Date	App Version #	Change
08/2022	2.3.0.0	Fixed error in query logic caused by data returned in activity
12/2020	2.2.0.0	Optimized query for performance and used a date range filter to limit results
07/2019	2.1.0.0	Improve application performance and compatibility
08/2018	1.0.0.0	Application Created