Electronic Agreements

Application Name: PS_AGREE
Application Description: Create/Update Agreements
Application: 9555

DNAapp ID 0b2cf201-13a7-4d9c-9310-3d604fb3950e

Overview:
This application PS_AGREE creates and/or updates agreements in the specified Agreement Type to enable account-owner access to account information through a third-party internet banking provider and / or the Voice Response (VRU) system. The application produces a detail report of the agreements created/updated, with totals.

The application links eligible accounts to agreements owned by the account owner and / or those persons with the appropriate Account Roles, to provide the ability to access account information via the internet-banking and / or VRU channels.

This application is not designed to work with so-called “plastic card” agreements such as ATM or debit cards and should not be used to create internet agreements for e-CB.

Key Benefits:
This application automates the creation of Web Banking (and other channel) agreements in DNA®, eliminating what is normally a manual process, and ensuring consistency. Multiple configuration options allow the Financial Institution to tailor the process to suit their business needs and rules.

Processing:
<u>Account Product Eligibility</u>
Only accounts in products that support agreements of the type specified in the “Agreement Type” parameter are processed. This restriction is always enforced by PS_AGREE, even if the “Major/Minors to Include” parameter is populated to process only specified products – the Agreement Type must be linked to each product to be processed. Product eligibility for specific Agreement Types is controlled in DNA via the Product Maintenance function. (System > Product and Pricing > Manage Product > Assoc… > Cards)

<u>Account Owner Eligibility</u>
For person-owned accounts, the Tax Reported For person is always eligible for access to account information via the Internet and VRU channels. In addition, any persons with eligible Account Roles for the specific Agreement Type being processed are provided account access via these channels.
For organization-owned accounts, only those persons with eligible Account Roles are eligible for access via these channels. (Currently, no maintenance function for the data that links eligible Account Roles to specific Agreement Types exists in DNA.)

<u>New Accounts</u>
When processing for ‘New Accounts’ (parameter AACT = N), only accounts with an Active Date* equal to the Queue Effective Date are processed. Such accounts that are not already linked to an agreement of the type specified by the “Agreement Type” parameter are linked to existing agreements. If the account owner has not established an agreement of the type specified, the “Create New Agreements YN” parameter determines whether or not that account is processed. If this parameter is set to ‘Y’ (Yes), a new agreement is automatically generated, and the account is linked to that agreement. If this parameter is set to ‘N’ (No), a new agreement is not created, and the account is not processed or reported.

All Accounts

When processing for ‘All Accounts’ (parameter AACT = Y), all eligible accounts are processed, regardless of Active Date*. Such accounts that are not already linked to an agreement of the type specified by the “Agreement Type” parameter are linked to existing agreements. If the account owner has not established an agreement of the type specified and the ‘Create New Agreements YN’ parameter is set to ‘Y’, a new agreement is automatically generated, and the account is linked to that agreement. (Note: the ‘Include Organization’, ‘Alternate Org Processing’ and ‘Use Account Roles’ parameters must also be set to Y for Organization-owned agreements to be created).

Organization Accounts

If the ‘Include Organization’ parameter is set to ‘Y’ (Yes), PS_AGREE processes accounts owned by organizations. Organization-owned accounts are linked to agreements owned by persons with an eligible Account Role on the organization-owned account. In addition, when the ‘Alternate Organization Processing’, ‘Create New Agreements’ and ‘Use Account Roles’ parameters are also set to ‘Y’ (Yes), this process will create agreements owned by organizations. Accounts are then linked to these agreements and associated with persons with an eligible Account Role on the organization-owned accounts.

If an organization is found and the pseudo person has the WWW agreement added, this agreement also has the PIN value set to the first four digits of the corresponding Organization EIN that the person is linked to, if the Pin Source (8PSC) is set to the EIN value.

Agreement Status

As stated above, accounts are linked to pre-existing agreements, when applicable. However, accounts are added to an agreement only if the ‘Card Status’ is ‘ACT’ (Active) or ‘ISS’ (Issued). Accounts are not added pre-existing agreements that have any other status, and PS_AGREE will not change the status of an existing agreement, nor will it create a new agreement if an agreement is found, regardless of its status. Accounts that would otherwise be linked to an agreement are ignored.

User-Defined Fields for Opting Out

Two User-defined Fields can also be used to exclude accounts from this process.

Reactivate Agreements

When runtime parameter Reactivate Agreements (8RAG) is set to Y this process updates the agreement status from CLOS to ACT when the owner of the agreement is related to an account that qualifies for linking to the closed agreement.

The account selection to reactivate agreements utilizes the runtime parameters Process All Accounts (AACT), Account Role Code (8ARC), Current Acct Status Code (CASC), and Major/Minor(s) To Include (8IMI). Roles are interrogated along with the tax reported owner on eligible accounts to see if there is an existing inactive agreement assigned to the person to reactivate.

Accounts are excluded from this process by utilizing runtime parameters Major/Minor(s) To Exclude (8XMI), User Field Code (8UFC), User Field Value (8UFV), Roles To Exclude (ROLE), and standard DNA Exclude Application functionality.

When an agreement is identified for reactivation, all previous accounts are removed and regular PS_AGREE processing continues.

Since PS_AGREE only supports one agreement per agreement type per person, if there is any person with more than one agreement of the type specified in runtime parameter Agreement Type (ATYP) and they are all closed only the first agreement found will be changed to ACT.

Parameters:

Parameter	Code	Description (How Used)	Required	Default
Agreement Type	ATYP	The Agreement Type Code of the Agreements to be generated should be entered here. Ex. WWW (for Internet agreements) Only one Agreement Type Code may be entered at a time. To generate Agreements for more than one Agreement Type, this application must be run once for each applicable Agreement Type. In order to add accounts to any type of agreement through this process, the Agreement Type must already exist in the DNA database and be associated with the appropriate products and roles (if applicable).	Yes	<Blank>
Process All Accounts	AACT	Determines if *all* eligible accounts or only *new* accounts are to be processed. N (No) = “Process New Accounts” This setting is designed to process new accounts (Active Date* = Queue Effective Date), only. The process adds each qualifying new account to an existing or new agreement of the type specified by the ATYP parameter. If no agreement exists and the “Create New Agreements YN” (8CNA) parameter is set Y (Yes), an agreement is created. Y (Yes) = “Process All Accounts” This setting is designed to process all eligible accounts, regardless of Queue Effective Date. In combination with the Major/Minors to Include (8IMI) parameter, this setting can be particularly useful in handling Externally-Serviced (Major EXT) accounts, which could potentially be loaded to the DNA database with a variety of Active Dates* in the past. The process adds each qualifying account to an existing agreement if one exists for the account owner. If no agreement exists and the “Create New Agreements YN” (8CNA) parameter is set Y (Yes), an agreement is created.	No	N (No)

Parameter	Code	Description (How Used)	Required	Default
Include Organization	IORG	When set to Y (Yes), the process includes accounts owned by organizations. When set to N (No), the process excludes all accounts owned by organizations. When organization accounts are included, the process links the accounts to the appropriate person or organization owned existing agreement based on the “Alternate Organization Processing” (8AOP) parameter. If no person owned agreement exists and the “Create New Agreements YN” (8CNA) parameter is set Y (Yes), an agreement is created for the person or organization.	No	N (No)
Include Persons	8UPR	This parameter controls the inclusion person owned accounts. When set to “Y”, the default, person accounts will be included for processing. When set to “N”, person records will be excluded from processing. If this parameter is left blank, person accounts will be included for processing.	No	Y (Yes)
Alternate Org Processing	8AOP	When set to Y (Yes), the application links a qualifying organization owned account to an “Active” (ACT) or “Issued” (ISS) organization owned agreement. (Organization owned accounts are linked to organization owned agreements only if the organization owned agreement has at least one person linked to it.) When set to N (No), the application links a qualifying organization owned account to an “Active” (ACT) or “Issued” (ISS) person owned agreement. (Organization owned accounts link to person owned agreements only if the person who owns the agreement has a qualifying account role on the organization owned account.)	No	N (No)

Parameter	Code	Description (How Used)	Required	Default
Org Types To Breakout	OTYP	This is used to limit the processing of organization accounts to those owned by organizations of the specified Organization Type(s). To include only certain Organization Types in the process, this parameter must list each applicable Organization Type, separating multiple entries by a comma. Ex: TRST,LLC In the above example, the only organization-owned accounts that are processed are those owned by organizations with the TRST (Trust) or LLC (Limited Liability Corporation) Organization Type. This parameter does not affect the selection of accounts owned by persons, only those owned by organizations. This parameter is valid for use only if “Include Organization” (IORG) = Y (Yes). If left blank, all organization types are included.	No	<Blank>
RptOnly_YN	RPT	When set to Y (Yes), the process reports the applicable accounts but does not generate new agreements or new links to existing agreements. When set to N (No), the process performs all associated updates.	No	Y (Yes)

Parameter	Code	Description (How Used)	Required	Default
Account Role Code	8ARC	This setting can affect the selection of accounts for this process, based on Tax Ownership and Signing Authority of the primary account owner. The following values can be used in this parameter: TOWN (Tax Reported Owner) Only accounts for which TaxRptForOwnYN = 'Y' are selected. TSIG (Tax Reported Signatory) Only accounts for which TaxRptForSigYN = 'Y' are selected. Either entry in this parameter renders accounts that do not have a Tax Reported Owner or a Tax Reported Signatory (depending on the specific setting used) *ineligible* for the process or such accounts are not linked to an agreement by PS_AGREE. If left blank, standard processing for the Tax Reported For person prevails, without regard for 'Owner' or 'Signatory' status. Note: This parameter affects account selection, only. It does not alter the Account Roles eligible for any Agreement Types.	No	<Blank>
Roles To Exclude	ROLE	This parameter is used to prevent the process from automatically linking Persons with the specified Account Role(s) on the account, regardless of other roles the Person may have on the same account (including the Tax role). This is entered as one or more Account Role Codes, separating multiple entries by a comma. Ex: 'MINR,BENE' In the above example, Persons with either the 'Minor' or 'Beneficiary' Account Role are not linked to an agreement for the account by PS_AGREE, even if that Person has another qualified role on the account. If left Blank, no roles are excluded.	No	<Blank>

Parameter	Code	Description (How Used)	Required	Default
Create New Agreements YN	8CNA	This determines whether or not new agreements are created to accommodate the accounts selected for processing. Y = New agreements are created as needed and accounts are linked to those agreements. N = New agreements are not created. Accounts for owners without an agreement are not processed. Note: PS_AGREE will not change the status of an agreement. If an agreement is found, regardless of its status, a new agreement will not be created. Accounts are only added to agreements with an “Active” (ACT) or “Issued” (ISS) status.	No	Y (Yes)
Pin Length	8PLN	This option determines the length of the PIN generated for new agreements by PS_AGREE. The options are 4 or 6 digits.	No	4

Parameter	Code	Description (How Used)	Required	Default
Pin Source	8PSC	This determines how the PIN is derived. The valid options are: DEFAULT (PIN is generated from the last digits of the Agreement Owner's Tax ID) ALTERNATE (PIN is generated from the last digits of the Agreement Number) MEMBER (PIN is generated from the last digits of the Member Number) EIN (PIN is generated from the first 4 digits of the Organization) This is only an option when The IORG = Y DOB (PIN is generated from the Agreement Owner's date of birth) When PIN Length is 4, the PIN uses the two digits month and two digits year of the Agreement Owner's date of birth (MMYY). If a date of birth does not exist, then the last 4 digits of the Agreement Owner's primary address zip code will be used. When PIN Length is 6, the PIN uses the two digits month, two digits day, and two digits year of the Agreement Owner's date of birth (MMDDYY). If a date of birth does not exist, then the first 5 digits of the Agreement Owner's primary address zip code will be used with a zero appended to the end. NOTE: When DEFAULT, MEMBER and DOB Pin Sources are selected, if the value is missing on the customer record the application will use all zeros to generate the PIN.	No	DEFAULT

Parameter	Code	Description (How Used)	Required	Default
Major/Minor(s) To Include	8IMI	This is used to limit the process to the specified account products (Major/Minor combinations). To include only certain products in the process, this parameter must list each applicable product (Major Account Type Code/Minor Account Type Code), separating multiple entries by a comma. Ex: 'EXT/GOLD,EXT/MCRD' In the above example, only accounts in the two 'Externally Serviced' products specified are processed, assuming those products allow the Agreement Type specified in the ATYP parameter. This parameter is mutually exclusive of the Major/Minors to Exclude (see below). If left Blank, all eligible products are included.	No	<Blank>
Major/Minor(s) To Exclude	8XMI	This is used to omit the specified account products (Major/Minor combinations) from the process. To exclude certain products from the process, this parameter must list each applicable product (Major Account Type Code/Minor Account Type Code), separating multiple entries by a comma. Ex: 'EXT/GOLD,EXT/MCRD' In the above example, the only eligible accounts that are excluded from the process are the two 'Externally Serviced' products specified. This parameter is mutually exclusive of the Major/Minors to Include (see above). If left Blank, None are excluded. NOTE: You can exclude products from this application using the standard DNA exclude function. This allows for many more products to be excluded, but it will affect all runs of the application. If using multiple runs that exclude different products, you will need to use the 8XMI parameter instead.	No	<Blank>
Account Number	ACCT	If this is populated, only the account number in this parameter is considered when PS_AGREE creates / updates agreements, without regard to the "Process All Accounts" (AACT) parameter.	No	<Blank>

Parameter	Code	Description (How Used)	Required	Default
Current Acct Status Code	CASC	If this parameter is populated, the program selects accounts which have the specified Account Status Code(s) assigned to them. If no values are entered in this parameter, the program uses the Account Status default value of ‘Active’ (ACT) to select accounts.	No	ACT
Days to Go Back	DTGB	The number of days to go back when evaluating new accounts when the “Process All Accounts” (AACT) parameter is set to “N”.	No	0
Use Account Roles	8UAR	When set to “Y”, only accounts with qualifying account person roles will be added to organizations agreements. The accounts will only be linked to the agreements via the persons holding the roles. If those persons are missing from the organization’s agreement, they will be added to the organization’s agreement. If the organization agreement does not exist, it will be created if the “Create New Agreements” parameter is set to “Y”. This parameter will only be considered when the “Include Organization” and the “Alternate Org Processing” parameter are set to “Y”.	No	N (No)
Account Role Action	8ARA	When set to “ACCOUNT” (1), the account is excluded from processing based on the “Account Role Code” parameter. The account will not be linked to any agreements. When set to “TAX OWNER” (2) the tax owner is excluded from processing on the account based on the “Account Role Code” parameter. The account can be linked to agreements not owned by the tax owner. When left blank, this parameter will default to “ACCOUNT” (1)	No	<Blank>

Parameter	Code	Description (How Used)	Required	Default
User Field Code	8UFC	The user field used to exclude accounts from agreements. This user field can be set at the account, person, or organization level. If left blank, this field is set programmatically based on the Agreement Type parameter value: • Agreement Type WWW = 8XWW • Agreement Type VRU = 8XVR • All Other Agreement Type = <blank>	No	<Blank>
User Field Value	8UFV	The exact value in the user field above that is used to indicate an account, person, or organization should be excluded from this process. If left blank, this field is set programmatically based on the Agreement Type parameter value: • Agreement Type WWW = Y • Agreement Type VRU = Y • All Other Agreement Type = <blank>	No	<Blank>
Parallel Process YN	PARA	Indicates if you wish to use parallel processing. Setting this to “Y” for the first run of the application offers a significate increase in performance. If left blank, N will be used.	No	N (No)
Record Activity Y/N	8RA	Indicates if you want this application to record activity. Setting this to “N” for the first run of the application offers a significate increase in performance. If left blank, Y will be used.	No	Y (Yes)
Date Converted	8DCV	All eligible accounts with a ‘Date Converted’ that is equal to this date will be processed. When left blank, this parameter will be ignored.	No	<Blank>
Reactivate Agreements	8RAG	When set to Y existing person agreements will be reactivated when an eligible account is found. When set to N no existing person agreement will be reactivated.	No	N (No)

*Active Date, as used in this document, refers to the first date the account was moved into the ‘Active’ Account Status.

User-Defined Fields:
The following two user fields are provided by Fiserv for the Financial Institution’s convenience. The FI has the choice to use any user field / value pair for excluding accounts, persons, or organizations by utilizing the “User Field Code” (8UFC) and “User Field Value” (8UFV) parameters.

User Field	Code	Description (how used)	Data Type
Opt Out - WWW Agreement	8XWW	This user field can be used to exclude specific accounts, persons, or organizations from receiving new WWW (Internet) agreements via the PS_AGREE process.	YN
Opt Out - VRU Agreement	8XVR	This user field can be used to exclude specific accounts, persons, or organizations from receiving new VRU (Voice Response Unit) agreements via the PS_AGREE process.	YN

These user fields will not prevent agreements from being created via any other process, nor do these user fields have an effect on any accounts already linked to an agreement (they cannot be used to de-link an account or accounts from an agreement after such a link has been established).

These Yes/No User Fields are available at the account, person and organization levels:

- *Account Level*
  The account is not added to any agreement.
- *Person Level*
  The agreement is not created for the person; no accounts are linked to the person's existing agreement.
- *Organization Level*
  The agreement is not created for the organization; no accounts are linked to the organization's existing agreement.

Activity:

Activity Category	Code	Activity Type	Code	Activity Subject
Agreement Maintenance	AGRE	Agreement	AGRE	Person
Agreement Maintenance	AGRE	Agreement	AGRE	Account Number

Scheduling and re-run information:
The batch application can be re-run whenever required**.**

Report:

```
REPORT PARAMETERS

Agreement Type:  WWW
Process all accounts:  Y
Include Organization:  N
Include Persons:  Y
Alternate Org Processing:  N
Org Types to breakout:
RptOnly_YN:  Y
Account Role Code:
Roles To Exclude:
Create New Agreements YN:  Y
Pin Length:  6
Pin Source:  DEFAULT
Major/Minor(s) To Include:
Major/Minor(s) To Exclude:
Account Number:
Current Acct Status Code:  ACT
Account Role Action:
Days To Go Back:  0
Use Account Roles:  N
User Field Code:
User Field Value:
Parallel Process YN:
Record Activity Y/N:  Y
Date Converted:  01-11-1982
Reactivate Agreements:  Y
```

```
Bank:    Test Institution                      CREATE/UPDATE AGREEMENTS                      Run Date:  01-25-2019
Report:  PS_AGREE                                                                           Post Date:  01-24-2019
                                                                                                 Page:  21 of 1999

* - Related to an Organization agreement created during this execution


Account                 Agreement Number        Person Number           Agreement  Account       Agreement  Agreement
Number                  Agreement Owner         Person Name             Status     Relation      Action     Owner Type
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258600                  4978189                 1500                    ACT        Tax Owner     Updated    Person
                        Fxzmua Acwsua           Fxzmua Acwsua
263000                  4969580                 1503                    ACT        Tax Owner     Updated    Person
                        Zvev M Wwfqyk           Zvev M Wwfqyk
263800                  4967437                 1504                    ACT        Tax Owner     Updated    Person
                        Nmmvhq Pevutkikpp       Nmmvhq Pevutkikpp
264600                  4965272                 1505                    ACT        Tax Owner     Updated    Person
                        Kwsuknoq Valfhc         Kwsuknoq Valfhc
```

```
Bank:    Test Institution                      CREATE/UPDATE AGREEMENTS                    Run Date:  01-25-2019
Report:  PS_AGREE                                                                         Post Date:  01-24-2019
                                                                                               Page:  1999 of 1999


Agreements Created  Agreements Updated  Agreements Skipped
------------------  ------------------  ------------------                         25-Jan-2019  10:27 AM
1343                48943               0



  Procedure Runtime: 00:00:55
     Report Runtime: 00:00:27
```

Additional Requirements:

Agreement Types can be created or maintained using the “Agreement Types” menu item from the “Institution” menu in the “System” service.

System > Institution > Agreement Types

Account Roles can be created or maintained using the “Account Roles” menu item from the “Business Tables” menu in the “System” service.

System > Business Tables > A-C Tables > Account Roles

The Agreement Types, Account Roles and “Opt Out” User Fields must be associated with the products that should have the specified Agreement Type created or updated by this application.

Select the product you want to manage using the “Manage Products” menu item from the “Product and Pricing” menu in the “System” service to open the “Product Maintenance” screen.

System > Product and Pricing > Manage Products

You can associate Agreement Types with Products using the “Cards” menu item from the “Assoc…” menu on the “Product Maintenance” screen.

You can associate Account Roles with Products using the “Roles” menu item from the “Assoc…” menu on the “Product Maintenance” screen.

You can associate “Opt Out” User Fields with Products using the “User Fields” menu item from the “Assoc…” menu on the “Product Maintenance” screen.

After the Agreement Types and Account Roles have been setup, your DBA needs to run a modified version of the following SQL to set the associations between the appropriate Agreement Types and Account Roles.

Example Agreement Type / Account Role Association (WWW)	Example Agreement Type / Account Role Association (VRU)
insert into agreementtypacctrole (agreetypcd, acctrolecd) select a.agreetypcd, b.acctrolecd from cardagreementtyp a, acctrole b where a.agreetypcd = 'WWW' and b.acctrolecd in ('WWW','OWN','SIGN') and not exists (select null from agreementtypacctrole c where c.agreetypcd = a.agreetypcd and c.acctrolecd = b.acctrolecd);	insert into agreementtypacctrole (agreetypcd, acctrolecd) select a.agreetypcd, b.acctrolecd from cardagreementtyp a, acctrole b where a.agreetypcd = 'VRU' and b.acctrolecd in ('VRU','OWN','SIGN') and not exists (select null from agreementtypacctrole c where c.agreetypcd = a.agreetypcd and c.acctrolecd = b.acctrolecd);

Installation:
Install the application through DNAapp Management Console (formerly known as DNA Configuration Toolkit). The instructions on how use the DNAapp Management Console should be delivered along with the DNAapp Management Console. Please contact Client Care if you need assistance using the DNAapp Management Console.

This DNAX will be installing the following SQT file: PS_AGREE.sqt. The DNAapp Management Console will place the SQT file in the location specified in the EXTNS Batch Report Directory ‘BATE’ Institution Option batch application directory. You may need to move the SQT out of the EXTNS folder over to the PS batch application directory specified in the PS Batch Report Directory ‘BATP’ Institution Option depending on what has your nightly batch requires.

Note: If a previous installation was not with a DNAX file, ensure that a prior version of the .SQT does not exist in the PS batch application directory specified in the PS Batch Report Directory 'BATP' Institution Option.

For institutions using UC4 (Automic) for batch processing, please confirm the Adhoc Tax ID Decryption (AHTX) Institution Option is set to "Y" and the Adhoc Oracle User (AHUS) Application is set-up for the Automic Oracle User. **This must be confirmed, even if you the application was downloaded from the AppMarket.**

Configuration Checklist:
The following checklist should be used to help ensure all configurable settings have been completed prior to using this application.

Item	Test Environment	Production Environment
Product / Agreement settings		
Account Role / Agreement settings		
Parameters		
User Fields		

Revisions:

Date	App Version #	Change
05/2023	1.0.4.4	Modified report to print Created instead of Updated when organization agreements are created. Modified to report organization agreements created when running non-updating (missing from report and only appeared when run updating). Modified Installation section of document.
02/2023	1.0.4.3	Added an option to the PIN source(8PSC) parameter to include the first 4 digits of the organizations EIN.
02/2023	1.0.4.2	Modified code to Reactivate Agreements with appropriate dates. Also, the reactivated agreement will no longer have old accounts in it.
06/2022	1.0.4.1	Modified for Voltage phase 2.
04/2022	1.0.4.0	Added runtime parameter Reactivate Agreements (8RAG).
02/2022	1.0.3.1	Adjusted Date Converted (8DCV) logic.
09/2021	1.0.3.0	Changed reference to AppMarket
10/2020	1.0.3.0	Added the Date Converted parameter.
08/2020	1.0.2.0	Changed label to Fiserv Confidential
10/2019	1.0.2.0	Added support for 6-digit DOB PINs.
09/2019	1.0.1.1	Fixed the validation comments.
09/2019	1.0.1.1	Adjusted report only functionality for organizations.
02/2019	1.0.1.0	Fixed installation error that occurred when the 8RA parameter was missing from the database. If version 1.0.0.9 is already installed, there is no need to install version 1.0.1.0.
01/2019	1.0.0.9	Added parallel processing, the ability to disable activity, and optimized the report performance.
09/2018	1.0.0.8	Added new parameters to allow different user fields to be used for excluding accounts, persons, and organizations.

Date	App Version #	Change
08/2018	1.0.0.7	Corrected issue with Non-Tax Owners appearing as tax owners on the report. Corrected the data type of the Include Persons parameter.
03/2018	1.0.0.7	Upgraded from DNAcreator V1 to V4. Updated install script for parameter 8UPR in EXTN folder.
02/2018	1.0.0.7	Documentation update - Added Fiserv Confidential Label
07/2017	1.0.0.7	Fixed member agreement number to use last, not first for pin.
05/2016	1.0.0.6	Added “Account Role Action” run time parameter – 8ARA
02/2016	1.0.0.6	Added “Include Person” run time parameter – 8UPR
02/2015	1.0.0.6	Ability to add Organization-owned agreements. Include new 8UAR parameter.
12/2014	1.0.0.6	Added the DOB pin source.
12/2014	1.0.0.6	Added the MEMBER pin source. Removed the Expire Date.
04/2014	1.0.0.5	Re-Packaged and Re-documented for AppMarket
04/2014	1.0.0.5	Documentation Format Update
04/2014	1.0.0.5	Added input parameter Days to Go Back (DTGB)
10/2013	1.0.0.4	Re-Packaged and Re-documented for AppMarket
01/2013	1.0.0.3	Case 1714958 Repaired the functionality to alternately assign a PIN based on the agreement number.
09/2012	1.0.0.2	Added new parameter 8AOP and GRANT EXECUTE removed.
12/2011	1.0.0.1	Activity has been logged for CardAgreement, CardPers, AcctAgreementPers, Cardmember, CardMemberIssue, and CardMemberIssueHist tables while doing insert/Update.
12/2011	1.0.0.0	Re-Packaged and Re-documented for AppMarket
12/2011	1.0.0.0	Document run of PS_AGREE_DDL.SQL and load of package spec and package body
12/2011	1.0.0.0	Documentation revised according to appStore standards