



Member Number Generator

MemberNbrGenPkg.dnaxp

DNAapp ID: 457076ec-b1b7-4709-8096-9208f440aa40

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Overview:

The Member Number Generator DNAapp gives a financial institution the ability to assign a member number to a person or organization through the New Person Wizard and the 'More' menu of Relationship Profile.

Key Benefits:

Assigning a member number to new people gives a financial institution the ability to uniquely identify a person. Often with external interfaces, a financial institution needs the ability to uniquely identify the entity (either a person or an organization).

Tax IDs are not necessarily unique between a person's social security number and an organization's EIN. Person and organization numbers are not unique across entities (i.e. Person 1234 could exist as well as Organization 1234). By assigning a member number, gives joint owners who are not otherwise members, the ability to use the external interfaces.

Processing:

The Member Number Generator can be launched from the following locations within DNA:

- From the 'More' menu of Relationship Profile
- As a step in the New Person Wizard

'More' Menu of Relationship Profile:

If a person or organization is in need of a member number, the user can launch the Member Number Generator DNAapp from the 'More' menu of Relationship Profile.

This option can also be used to update the Member Group for a person/organization with an existing Member Agreement.

The user will search for the person or organization in Relationship Profile.

Once the person/organization is selected, click the 'More' menu, and then click the "Member Maintenance" option.

The Member Number Generator DNAapp is then launched and the current person or organization selected is passed into the screen.

Member Number Maintenance

Member Maintenance

Name	Member Number	Member Group
Test User		

Auto Hide Edit

Member Maintenance

Name

Member Group »

Continue

Close Close Clear Review Process

The user will then click the Edit button, and select a Member Group from the drop-down list.

Once a Member Group has been selected from the drop-down list, the user should do the following steps:

1. Click the 'Continue' button to update the information in the grid. Note: the database changes have not yet been applied.
2. Click the 'Process' button to create or update the Member Agreement and write the activity entries.

If the member agreement is being created, the Member # will be updated in the banner for the person or organization.

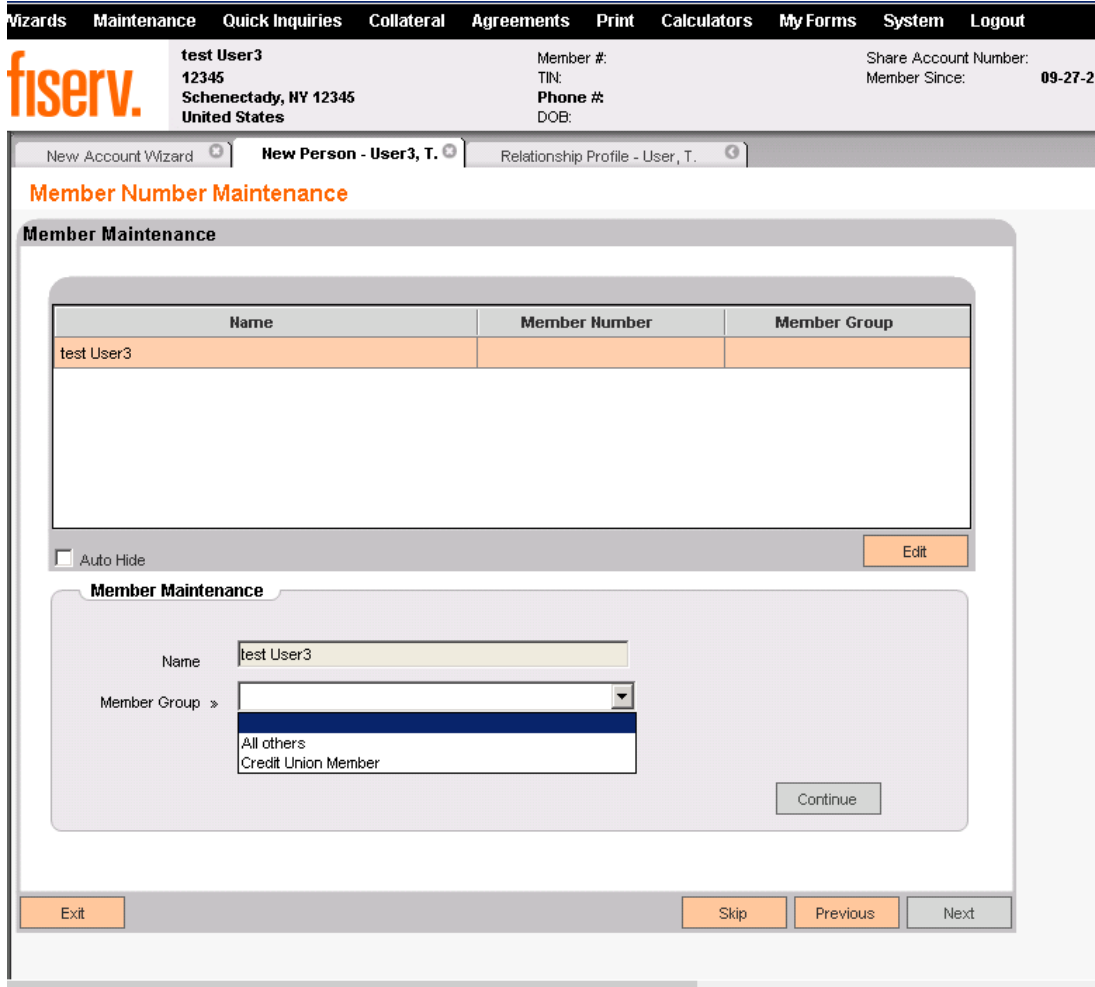
New Person Wizard:

When the New Person Wizard is started, the first screen to be launched is the New Person Creation screen. Once the necessary fields have been entered, the user clicks the 'Next' button and advances to the Person Type screen.

If the person type is defaulted, the user can click the 'Skip' button and advance to the next screen in the wizard. Otherwise, the user will update the person type(s) and then click the 'Next' button.

The Member Number Maintenance screen is the next screen in the New Person Wizard.

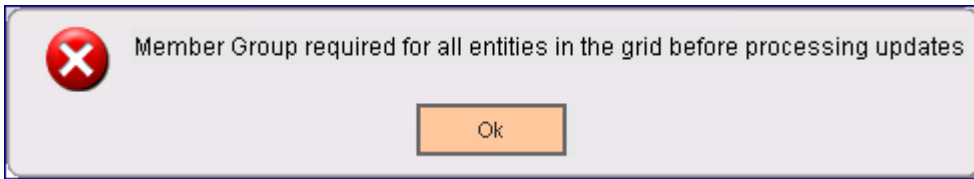
The user will click the Edit button, and then select the appropriate Member Group from the drop down list.



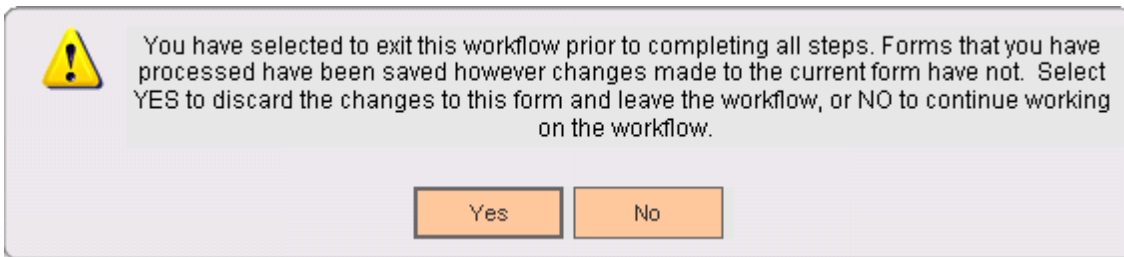
If a selection is not made in the Member Group drop down, the following error appears (along the bottom of the screen) when the user clicks the 'Continue' button:



If a person has not been assigned a Member Group, the following error message appears when the user clicks the 'Next' button:



If 'Exit' is clicked on the Member Number Generator app, the following message will appear:



Click 'Yes' to close the New Person Wizard. Click 'No' to return to the Member Number Generator app screen.

Once a Member Group has been selected from the drop-down list, the user should do the following steps:

3. Click the 'Continue' button to update the grid. Note: the database changes have not yet been applied.
4. Click the 'Next' button to create the member agreement and to advance to the next screen in the New Person Wizard. Note: The Member # will appear in the banner throughout the remaining screens in the New Person Wizard.

Institution Variables:

The following Institution level variable is utilized. The variables can be found under the "Member Number Generator" (8MNG) calculation type.

Variable	Code	Description	Data Type	Default
Member Nbr Gen Enable Skip YN	8MNS	When set to Y, the Skip Button will be enabled for the Member Number Maintenance screen under New Person/Member Wizard. When set to N or is blank, the Skip Button will not be enabled for the Member Number Maintenance screen under New Person/Member Wizard.	YN	Y

Authorizations:

To grant a user access to this App, the system admin can either add the “Member Number Maintenance (MNGA)” Auth group to the user or the “Member Number Maintenance AuthItem (MNGA)” and the “CAPR 7873 (7873)” AuthItems to an Auth group, such as financial service representatives, to which the user has access privileges. In either case, the system admin also needs to verify that the user be granted update and retrieval permissions.

The following authorization entries are included in the installation:

AUTHDESC	AUTHITEMCD	AUTHITEMDESC	PERMISSIONDESC
Member Number Maintenance	7873	CAPR 7873	Employee Access
Member Number Maintenance	7873	CAPR 7873	Update
Member Number Maintenance	MNGA	Member Number Maintenance	Employee Access
Member Number Maintenance	MNGA	Member Number Maintenance	Update

If a user has not been granted authorization to use the Member Number Generator Winform app, the error message will be displayed and the screen will need to be closed.



Activity

This application updates activity when member agreement is created, using the following Activity Category and Activity Type:

Activity Category	Code	Activity Type	Code	Activity Subject
Member Maintenance	MBMT	Member Information	MBR	Primary Person/Primary Organization of agreement.

Screens:

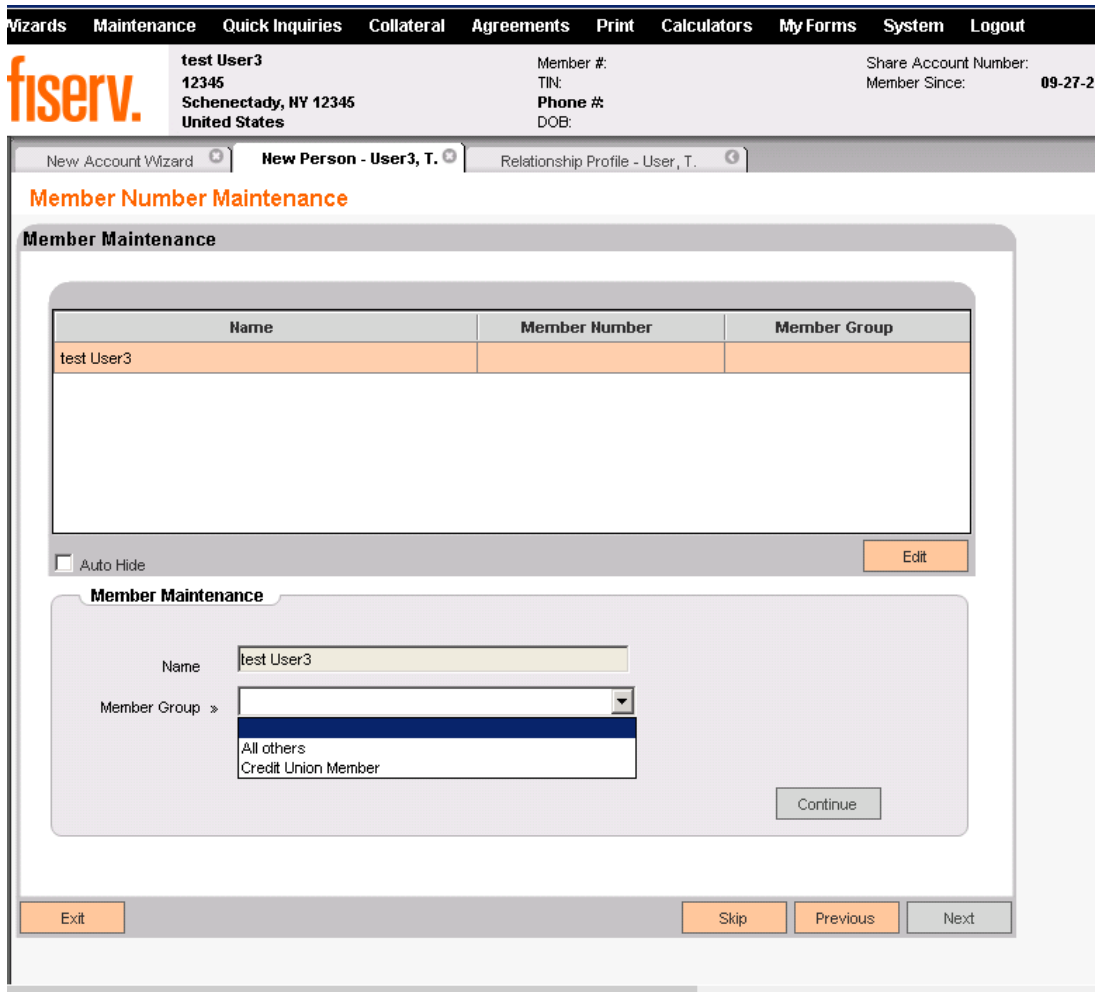
Navigation

Member Number Maintenance:

- >Relationships
 - >Quick Inquiries
 - >Relationship Profile
 - >More
- >Member Maintenance

- > Relationships
 - > Wizards
 - > New Person/Member
 - > New Person Creation
 - > Person Type
 - > Member Number Maintenance
 - > ...the rest of the screens within the New Person/Member Wizard

Screen Appearance (example):



Field Listing:

Field	Description
Member Maintenance	
Name	The name of the people/organizations passed into the app

Field	Description
Member Number	The member agreement number for the person or organization, if one already exists.
Member Group	A description of the member group.
Buttons (New Person Wizard)	
Exit	This button will display a message about closing the wizard and then will close the wizard or return to the screen, based on the user's response.
Continue	Click the Continue button to update the grid with the Member Group selected for the person/organization.
Skip	Allows user to skip generating the member number functionality. This button can be enabled/disabled by Variable "Member Nbr Gen Enable Skip YN (8MNS)".
Previous	Return to the previous screen in the New Person Wizard.
Next	Advance to the next screen in the New Person Wizard.
Buttons (Relationship profile More menu)	
Process	Creates or updates the Member Agreement and writes the activity entries.
Close/cancel	Closes the screen or cancels the changes made.

Additional Requirements:

- Requires DNA 4.5.2 or higher.
- .NET Framework 4.5.2
- Core API 2.1.0.5 or higher
- Requires the 'More' menu of Relationship Profile.
- This App will only work on Credit Union environment of DNA.
- Requires an 'Extensions' folder exist with the DNA.CoreApiService folder prior to installing this DNAapp.
- While updating from version 1.0.1.5 (or earlier) to an advanced version (1.0.1.6 or higher), there is a chance that an existing apps sharing the AppId used by this app (version 1.0.1.5 or earlier versions) gets uninstalled, The same will be reflected in the "Extension Result Summary" screen of DNAapp management Console after the upgrade is finished. FIs are required to re-install the app which gets uninstalled while updating older versions to 1.0.1.6 (or higher). The same situation will not occur if it's a fresh install of version 1.0.1.6 (or higher).
- Starting with version 1.0.2.0, the DNAapp doesn't provide the "Member Number Generator" step in New Deposit Account Wizard (NDAW) and therefore, the corresponding components have been removed from the app. If an institution has older version of this app, it is recommended that the NDAW related components (MemberMaintenance.dnax and WFDMember.dnax) be either uninstalled or deactivated manually using the DNAapp Management Console.

Configuration Checklist:

Item	Test Environment	Production Environment
Prior to installing the DNAApp, check for the existence of an Extensions folder under DNA.CoreApiService folder on the application server. If it does not exist, create the folder prior to the installation of the DNAApp.		
Authorizations		
Variables		

Revisions:

Date	App Version #	Change
12/2021	1.0.2.0	Removed "Member Number Generator" step from New Deposit Account Wizard.
10/2021	1.0.1.6	Updated "Additional Requirements" section of user guide regarding BizChex service.
05/2021	1.0.1.6	Updated API Extension component with newer ApplId.
08/2020	1.0.1.5	Updated user guide with screenshots in DNA standard theme.
06/2020	1.0.1.4	Enhance code to enable the Skip button on the New Person Wizard.
01/2018	1.0.1.2	Updates to DNAApp: <ul style="list-style-type: none"> - Added Member Maintenance workflow step - Added a custom New Deposit Account Workflow that includes the Member Maintenance step. - Added the Winform app to the 'More' menu of Relationship Profile. - Updated the logic in the Winform app to accept data from the workflow - Updated the layout of the Winform app to allow multiple entities to be maintained.
09/2014	1.0.0.0	Application Created