# Reset Account Date of Last Contact

**PS_RESET_DLC**
**Application 15256**

**Overview:**
The Reset Account Date of Last Contact, PS_RESET_DLC, application resets and account's Date of Last Contact to a value from an account entity attribute field or comma-separated file.

**Key Benefits:**
This application provides a solution to reset the Date of Last Contact on a series of accounts to specified values.

**Processing:**
The PS_RESET_DLC application resets an account's Date of Last Contact to a value from an account entity attribute field or comma-separated file as specified by the parameter value Date Last Contact Source (8DLE).

CSV file process:
The application reads in a comma-separated file containing account numbers and dates, the date format is MMDDYYYY. The application updates the account's Date of Last Contact value for each account number to the corresponding date in the file.

The date in the file must be a date earlier than or equal to the System Post Date; else the account is not updated.

Account entity attribute process:
The application looks for values in the specified account entity attribute field and updates the account's Date of Last Contact with the attribute value. The account entity attribute value will be inactivated once the account date of last contact has been reset.

If the "Update All Inactive Dates" (8UAI) parameter is set to Y, then the account entity attribute value will be inactivated.   This processing will occur if the account's Date of Last Contact is equal to the account entity attribute field.  The account's Date of Last Contact is not updated but the account entity inactive date is set to the Effective date, thereby eliminating the possibility that the account entity record on the database is not processed erroneously in the future.

If a value is provided in the runtime parameter 'Number of days (DAYS)', then the application only updates the date last contact on the account when the effective date of attribute is not older than the days mentioned in this parameter.

The application produces a report stating the number of accounts updated, as well as any exceptions i.e. Account not found, Invalid date or Date Last Contact is later than Post Date.

**Parameters:**

| Parameter | Code | Description (how used) | Required | Default |
|-----------|------|------------------------|----------|---------|
| RptOnly_YN | RPT | When set to Y nothing is updated but exceptions are noted on the report.<br>To update the accounts, set this to N.<br><br>If left blank, then default value is considered as Y. | No | Y |

| Parameter | Code | Description (how used) | Required | Default |
|---|---|---|---|---|
| Date Last Contact Source | 8DLE | When set to FILE a csv file is used by the application. When set to ATTRIBUTE the Minor Change Date of Last Contact (8MCD) account entity attribute value is used by the application. | Yes | <Blank> |
| Input File Path | IPTH | Complete path name where input file is located. The trailing backslash is optional (ex. "C:\TEMP\")<br><br>Only required and used when Date Last Contact Source is FILE. | No | <Blank> |
| Input File Name | IFLE | Name of input file.<br><br>Only required and used when Date Last Contact Source is FILE. | No | <Blank> |
| Update All Inactive Dates | 8UAI | If set to Y:<br>The account entity attribute value will be inactivated. This processing will occur if the account's Date of Last Contact is equal to the account entity attribute field. The account's Date of Last Contact is not updated but the account entity inactive date is set to the Effective date, thereby eliminating the possibility that the account entity record on the database is not processed erroneously in the future.<br><br>If set to N:<br>The account entity attribute value will not be inactivated, when the account's Date of Last Contact is equal to the account entity attribute field. | No | N |
| Number of Days | DAYS | Effective date of account entity attribute should not be older than the days mentioned in this parameter to update the date last contact on the account.<br><br>If left blank, then application will not consider this parameter. | No | 0 |

**Entity Attribute:**
The following account entity attribute will be used by the application to review Date of Last Contact values on accounts.

| Entity Attribute | Code | Description (how used) | Data Type | Default |
|---|---|---|---|---|
| Minor Change Date of Last Contact | 8MCD | Entity attribute that will store the account's date of last contact prior to the scheduled minor change. | DATE | <BLANK> |

## Non-Transaction Updating Applications

This application updates activity, using the following Activity Category and Activity Type

### Activity

| Activity Category | Code | Activity Type | Code | Activity Subject |
|---|---|---|---|---|
| Account Maintenance | AMNT | Account | ACCT | Account |

### Scheduling information:

- This application is run on an as needed basis.
- When using this application with any PS Minor Account Type Changes applications (PS_MINORCHNG, PS_MINORCHNGCSV, PS_MINORCHNGAGE, PS_MINORCHNG_QUAL), it must run after PS Minor Change applications and the DNA™ applications Change Minors **(**DP_CDM) and/or Change Loan Minors (LN_CLM) have completed the scheduled minor change.

### Report:

```
Bank:    0001 Test Institution              Reset Account Date of Last Contact          Run Date:  06-09-2020
Report:  PS_RESET_DLC                                                                   Post Date: 06-09-2020

Queue Number      :  92728                                                              Run Time:  04:02:50
Application Number:  15256                                                              Cash Box:
Queue Sub Number  :  2                                    SCHEMA
                                                          OSIBANK

                                                       DATABASE NAME
                                                         CS14.WORLD

                                                          RELEASE
                                                        DNA 4.6.1.0

                          06-09-2020 01:08:18 PM 375543 G:\OSI\BANK\SQT\4610\BAT_EXE\PS\


                                                     REPORT PARAMETERS

                     Date Last Contact Source:  ATTRIBUTE
                     Input File Name:
                     Input File Path:
                     Number of Days :  5
                     RptOnly_YN:  Y
                     Update All Inactive Dates:  N

Bank:    0001 Test Institution              Reset Account Date of Last Contact          Run Date:  06-09-2020
Report:  PS_RESET_DLC                                  Update Report                    Post Date: 06-09-2020
                                                                                                   Page: 1 of 2


                                                                         Prior Date of    Reset Date of
         Account Number   Major   Minor   Status   Account Owner         Last Contact     Last Contact

                  5200    SAV     PL01    ACT      BB Electrical Services LLC    03/17/2020       06/22/2010
                  6900    SAV     PL01    CLS      Marvin, Boris                11/22/2015       10/31/2005
               6802021    CK      CKUS    ACT      Marvin, Boris                11/21/2019       09/01/2015

      Total Accounts Updated :       3

Bank:    0001 Test Institution              Reset Account Date of Last Contact          Run Date:  06-09-2020
Report:  PS_RESET_DLC                                   Error Report                    Post Date: 06-09-2020
                                                                                                   Page: 2 of 2



   Account Number   Activity Error Message                          Oracle Error Message

           7600    Effective Date of entity attribute is more than 5 days old.

   Total:       1
```

- Output report includes the number of accounts updated at the end of the report.
- Output report includes the following Error Messages, where applicable:
    - Account not found
    - Invalid date
    - Date Last Contact is later than Post Date

**Additional Requirements:**
- Requires DNA 4.0 or higher

**File Layout:**
**Input File Layout – Comma Separated**

| Field | Format | Description |
|---|---|---|
| Account Number | 99999999 | Account Number |
| Date Last Contact | MMDDYYYY | The date to be updated as the Date Last Contact for the account |

**Configuration Checklist:**

| Item | Test Environment | Production Environment |
|---|---|---|
| Parameters |  |  |

**Installation:**
*Note:* If you obtained this application from the DNAappstore, please disregard the installation instructions below.  If you did not obtain this application from the DNAappstore, please complete the installation instructions below.

- Copy PS_RESET_DLC.SQT to the Batch Process to the PS batch application directory; the location specified in the PS Batch Report Directory 'BATP' Institution Option.

- This application requires the running of the script PS_RESET_DLC.SQL (Setup Script):  Copy the files to any directory accessible to the applicable SQL application (SQL Developer, PL/SQL Developer, etc.)  You need to run the setup script to register the application.

- This application requires an Authorization Key.  After the primary installation instructions have been completed, you must apply the supplied Authorization Key for this application.

    To enter the Authorization Key, go to Services >> System >> Institution >> Applications >> Application Manager.

**Revisions:**

| Date | App Version # | Change |
|------|---------------|--------|
| 02/2021 | | Bundled PS_RESET_DLC with minor change application. |
| 08/2020 | | Changed label to Fiserv Confidential |
| 06/2020 | | Added new parameter 'Number of Days (DAYS)' to compare the effective date of entity attribute. |
| 09/2019 | | Added Update All Inactive Dates (8UAI) parameter |
| 11/2018 | | Added Final-Queappl-Update for AppWorx. |
| 02/2018 | | Documentation update - Added Fiserv Confidential Label |
| 09/2015 | | Application Created |