

# Change of Address

Program Overview

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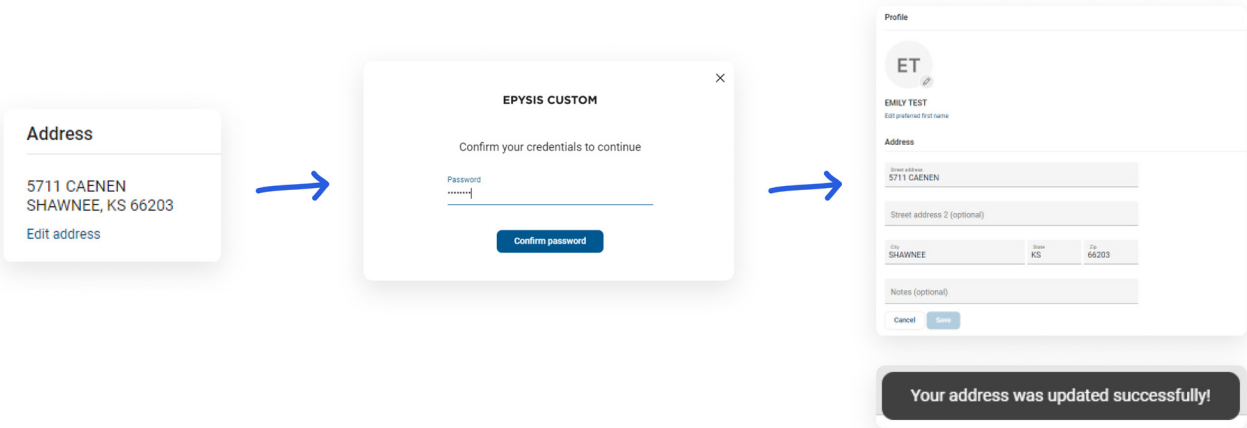
# Change of Address

This PowerOn allows the user to submit an address change to the credit union. The change will either immediately update the member's address in Episys, or if the member meets any of the ineligibility criteria, will start a conversation in Banno. The program allows for submitting changes to the following address fields: Street Address, Extra Address, City, State, and Zip Code.

## UX Run-Time Detail

Upon selecting "Edit Address" from the user's Profile, if the password was not entered immediately prior to launch, the Banno UX displays the password confirmation box. Once the password is confirmed the UX displays an input form allowing the following update options: Street Address, Street Address 2, City, State, Zip Code, and a field to add notes (optional).

Once the member enters the updates, they hit save to complete the address change.



## PowerOn Run-Time Detail

Once the member has entered and saved their updates, the account and address information is passed back to the PowerOn from the Banno UX. The PowerOn takes this information, reads the various parameter settings from the configuration Letter file, determines account and warning code eligibility, and performs the appropriate file maintenance on the account and name record(s). It then passes the success or pending address change message to the Banno UX.

# Program Setup & Installation

## Required Files

- REPWRITERSPECS folder
  - » BANNO.CHANGE.ADDR.V1.POW (Main PowerOn Program)
  - » Standard PowerOn library include files which should already be in your system:
    - RD.GETDATA.DEF
    - RB.LISTEXPAND.DEF
    - RB.LISTEXPAND
- LETTERSPECS folder
  - » BANNO.CHANGE.ADDR.V1.CFG (Main program configuration Letter file)

## Installation Steps

1. Upload files to their respective directories
  - » Recommend using Symitar PC Transfer.
2. Install the PowerOn programs for demand use
3. Add the Main PowerOn program name to SymXchange Common Parameters
4. In Device Control take SymXchange – Banno Off Host
5. Put SymXchange – Banno back On Host and verify Status = On Host
6. Update the settings in the configuration Letter file
  - » The configuration Letter file contains details for the various settings.
7. Update setting in Banno People to enable PowerOn (must be completed by Jack Henry)

## Configuration Letter File

The configuration Letter file allows certain aspects of the program to be customized to better suit your needs. Among the options which can be set are:

- Determine which account types are ineligible.
- Determine which account level warning codes to exclude.
- Determine if an account level warning code should be cleared upon updating the address record.
- Determine if an account level warning code should be set upon updating the address record.
- If setting an account level warning code, determine the number of days the warning code should be set to expire.
- Determine if entering a PO Box will be restricted.
  - » If entering a PO Box is restricted, identify the various PO Box character combinations the program should check for, i.e. P.O. Box, PO Box, etc.
- Determine what account tree levels should be updated if the address on the Name Record matches the address being changed.
  - » If left blank (not using name level matching) then the PowerOn will make the address change based on the user information stored in the Tracking Record 8. See *Additional Information* below.
  - » If account tree levels are used, identify what name types to include in the level matching.
- Determine if a confirmation email will be sent to the member upon successful address change. (Episys SENDMAIL functionality must be enabled).
  - » If using the confirmation email, identify the email type, email subject, email from, and email text.

The configuration Letter file contains full instructions on setting these run-time parameters. Do pay close attention when selecting your options making sure to set each option within the required parameters.

# Database Interaction

## Data Sources

Data utilized by the program is pulled from the following sources:

- Name records at the account, share, IRS, loan, pledge, EFT, card, and external loan levels

## Transactions / File Maintenance Performed

- Name record(s) updated based on configuration Letter file setup
- Note record created with the address change details
- Account warning codes updated (cleared or set based on configuration Letter file setup)
- Send the confirmation email if enabled

# Additional Information

## Name Record

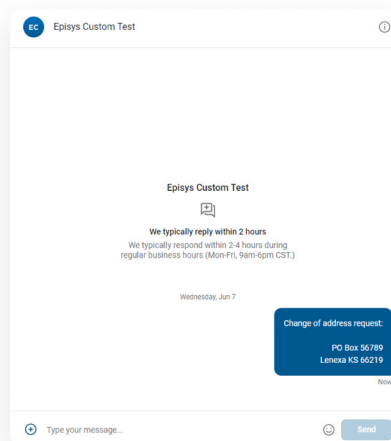
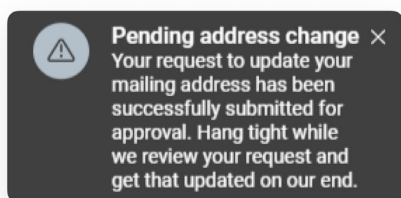
When the address change is successful, the name record(s) will immediately update in Episys. If name level matching is enabled in the configuration Letter file, the program will find all the allowed name records / name types with an address that matches the one being changed and changes them all at once.

## Note Record

When saving an address change a note record is added to the member's account regardless of status. The note will include address change status (successful, attempt, or error), Name Locator(s) updated, and reason for the attempt or error.

## Banno Conversations

Depending on account eligibility and the configuration Letter file setup, the address change may not immediately update in Episys, but rather start a conversation in Banno. The conversation to the credit union will include the member's updated address, plus any notes the member added with the expectation the credit union staff will manually update the member's record in Episys.



## Tracking Record 8 Cleanup

For credit unions using the Address Change PowerOn with Tracking Record 8 linking that are moving to the name level matching version, there are two items that need to be done in addition to enabling name level matching in the configuration Letter file. The first is to uninstall the Database Check PowerOn (BANNO.DATABASE.CHECK.V1.POW). That program connects a Banno user to a definitive name record, where the connection is stored in the (NetTeller) tracking type 8 record. The second is to upload and run the Tracking 8 Cleanup batch program (BANNO.TRACKING8.FM). This job creates an FM report to update, expire, or delete account level Tracking Type 8 records depending on user prompt selections. Then changes can be posted to the account with FM Processing.

## Tracking Record 8 Matching

If name level matching is not enabled in the configuration Letter file, the program will revert to linking the address changes based on Tracking Record 8. The credit union will need to refer to the required files and installation instructions below.

## Tracking Record 8 Matching Installation

### Required files when using Tracking Record 8 Linking

- REPWRITERSPECS folder
  - » BANNO.CHANGE.ADDR.V1.POW (Main PowerOn Program)
  - » BANNO.DATABASE.CHECK.V1.POW (Secondary PowerOn Program)
    - This file can be obtained from the link-user-to-episys-name-record section of the Banno GitHub repository.
  - » Standard PowerOn library include files which should already be in your system:
    - RD.GETDATA.DEF
    - RB.LISTEXPAND.DEF
    - RB.LISTEXPAND
- LETTERSPECS folder
  - » BANNO.CHANGE.ADDR.V1.CFG (Main program configuration Letter file)

### Installation Steps

1. Upload files to their respective directories
2. Install the PowerOn programs (Main and Secondary) for demand use
3. Add the PowerOn program names (Main and Secondary) to SymXchange Common Parameters
4. In Device Control take SymXchange – Banno Off Host
5. Put SymXchange – Banno back On Host and verify Status = On Host
6. Update the settings in the configuration Letter file
  - » The configuration Letter file contains details for the various settings.
7. Update setting in Banno People to enable PowerOn (must be completed by Jack Henry)