

CSB LOAN MANAGER - Version 7.8.2 05/26/17

We will begin releasing Version 7.8.2 on June 5, 2017. One of the key changes in this version is the addition of a field to store a “generation code” with names of borrowers and co-makers. Generation code refers to the notation of JR, SR, II, III, etc. Previously most users have entered this information in the last name field such as Smith Junior or Jones Sr as shown below which was fine.

Customer		Active duty military member or dep	
First Name:	JOHN		
Middle Name:	G		
Last Name:	DOE JR		▼
SSN:	- -		

New requirements for credit reporting to each of the credit bureaus require this information to be reported separately and specifically coded. This update provides a drop down list to select valid codes as indicated below.

Customer		Active duty military member or dep	
First Name:	JOHN		
Middle Name:	G		
Last Name:	DOE	JR	▼
SSN:	- -		
DOB:	/ /		
Sex:			
Home Phone:			
Cell Phone:			
Text Address:			▼

- JR
- SR
- II
- III
- IV
- V
- VI
- VII
- VIII

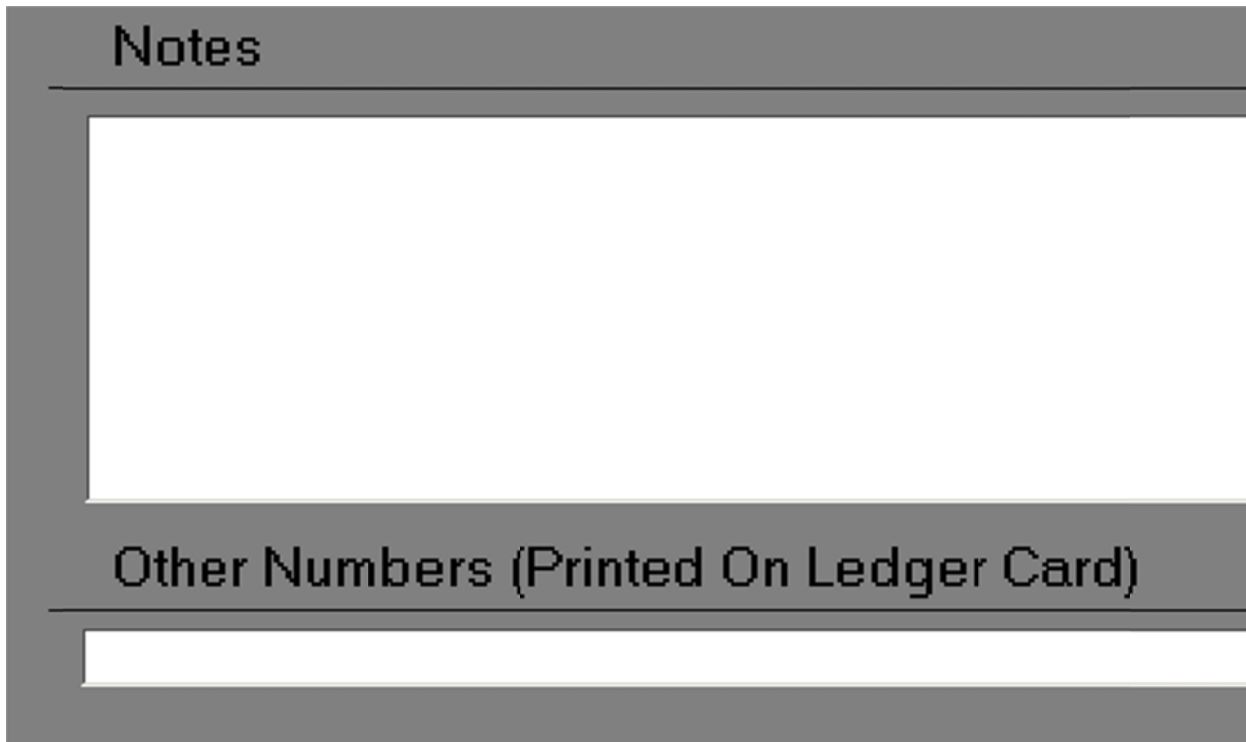
As new names are added they should be added in this manner. Existing entries that use the last name or other fields for this purpose should be edited to meet the new requirements. Note this does not apply if the person’s actual name is JUNIOR as in Junior William Jones.

This update also makes changes to the MAILING VARIABLES used within the program to support the generation code. A revised list is available at http://www.csbsoftware.net/downloads/MAILING_VARIABLES.pdf

OTHER IMPORTANT INFORMATION

We have noticed that some users randomly use different fields in the program for various kinds of notes. For example, we have seen entries like “Moved No Address” in the address field, social security numbers in the middle name field, etc. This causes problems from a compliance standpoint especially with credit reporting. Some things we can detect and handle from an error checking perspective. Most of these types of issues have to be controlled by the user. Information is reported to the credit bureaus as it is entered so when a user enters a middle name of “Need Phone” then that is what gets reported as the middle name of that customer.

There are a number of ways to enter notes in the program. One is in the notes section:



The image shows a screenshot of a software interface. At the top, there is a grey header bar with the word "Notes" in white text. Below this header is a large, empty white rectangular area. At the bottom of the interface, there is another grey header bar with the text "Other Numbers (Printed On Ledger Card)" in white. Below this header is a smaller, empty white rectangular area.

Another is using the Reminders/Alerts features to create reminders that a new address is needed or a new phone number is needed or for any kind of comment. If users do not know how to use these features they should contact Technical Support.

THE BOTTOM LINE IS EACH FIELD SHOULD ONLY BE USED FOR ITS INTENDED PURPOSE, SO THE MIDDLE NAME FIELD SHOULD ONLY CONTAIN AN ACTUAL MIDDLE NAME AND ADDRESS FIELD SHOULD ONLY CONTAIN AN ACTUAL ADDRESS. THIS APPLIES TO ALL FIELDS IN THE SYSTEM.