

## CSB Loan Manager

### Release Notes - Version 7.8.4 - 07/20/17 Revised 08/09/17

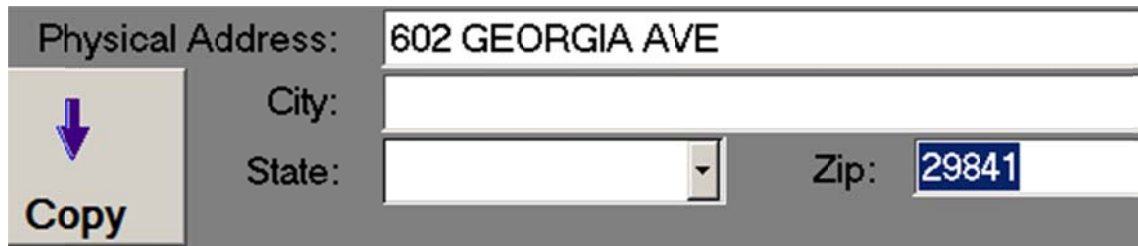
Beginning with this version we have added ADDRESS VALIDATION/STANDARDIZATION to key addresses within the program. This feature has been added to:

Applicant Screen: Physical Address, Mailing Address and Co-Maker Address

Customer Screen: Physical Address, Mailing Address and Co-Maker Address

This feature will validate and standardize the addresses based on US Postal Service standards. Understanding how and when this takes place will make the feature easier for you to use. This validation takes place when you are in Edit Mode and the cursor is moved out of any part of one of the address fields provided the associated zip code field is not empty. If only the zip code is entered the function will return the default city and state for that code. When the address is validated the address will be reformatted (standardized) if it does not meet the postal standards. Formatting based on the postal standards may be different than what you are used to. For example 503 Main Street formatted to postal standards would result in 503 MAIN ST changing the word STREET to the abbreviation ST. Punctuation is also removed so AVE. and ST. would be changed to AVE and ST without the period. Using the postal standards will ensure accuracy, improve delivery and can save you money when using automated mailing systems that provide discounts for standardized mailings. Note that we have removed the feature that automatically filled in the mailing address with physical address. Both addresses need to be validated as they are entered.

The example below shows how the address is entered by the user if only the street address and zip code are used:



|                   |                 |      |       |
|-------------------|-----------------|------|-------|
| Physical Address: | 602 GEORGIA AVE |      |       |
| City:             |                 |      |       |
| State:            |                 | Zip: | 29841 |

Copy


The following example shows what the screen looks like after the address is validated. Note that the city and state were filled and the zip code changed from 5 digits to 9 digits. A message box is also displayed telling the user the address was changed and reminding them to review the changes. If the correct standardized address is entered by the user the validation will not change the address and no message will be displayed. **This document has been revised to reflect changes made in Version 7.8.6. In rare cases the address returned by the validation may not be correct although it is what the USPS reflects in their record. If you know the validated address is not correct, you can now check the Override check box, edit the address and no validation will take place. This only applies while editing the affected address.**

Address: 602 GEORGIA AVE  Override  
 City: NORTH AUGUSTA  
 State: SC Zip: 29841-3704

Address:   Override  
 City:   
 State:

Address:   
 DL#:  Do Not Send Emails  
 L State:

**Address Validation and Standardization Notice**

 NOTICE: PHYSICAL ADDRESS Has Been Changed Based On Address Validation And Standardization. Please Review Before Saving.

If You DO NOT Want To Use The Address Returned In The Validation Process, Check Override And Edt The Address.

DO NOT OVERRIDE VALIDATION UNLESS YOU ARE SURE THE RETURNED ADDRESS IS INCORRECT !

In cases where an error is detected a message box will explain the error. An error can be caused by entering a valid street address for the wrong zip code and vice versa. In the example below the same address we used above was entered using an Augusta, GA zip code.

Physical Address: 602 GEORGIA AVE  
 City:   
 State:  Zip: 30901


(down arrow)

Mailing Address:   
 City:   
 State:

(up arrow)

Email Address:

**Validation Error**

 An Error Was Encountered Validating The Address > Error: [20528] [-2147219401] Address Not Found.

NOTE: THIS TYPE OF ERROR WHEN VALIDATING ADDRESSES COULD BE CAUSED BY AN INVALID STREET ADDRESS OR AN INCORRECT ZIP CODE. PLEASE CHECK YOUR ENTRIES AGAIN.

If there had been a 602 Georgia Ave in the zip code 30901 the address would have been valid. This is why it is important to check after validation to make sure you end up with the correct address.

**PLEASE NOTE THAT THE VALIDATION PROCESS TAKES PLACE OVER THE INTERNET SO IF YOU DO NOT HAVE A CONNECTION TO THE INTERNET YOU WILL GET AN ERROR. YOU CAN STILL MANUALLY ENTER THE ADDRESS AND CHECK IT LATER.**

An error message similar to the one displayed below would indicate an error relating to the validation site which could be caused by a network failure or internet connection failure. It may be caused by a temporary condition but if this type of error persists, contact technical support.

|          |                      |      |       |
|----------|----------------------|------|-------|
| Address: | 602 GEORGIA AVE      |      |       |
| City:    |                      |      |       |
| State:   | <input type="text"/> | Zip: | 29841 |

|          |                      |
|----------|----------------------|
| Address: | <input type="text"/> |
| City:    | <input type="text"/> |
| State:   | <input type="text"/> |

**Other Error** [X]

 An Error Was Encountered While Trying To Validate The Address  
> Error: [26005] [11004] Valid name, no data record (check DNS setup)

OK

**Please remember also to only use the address fields for addresses. Do not put other information such as “Moved” or “Need New Address”. The information contained in the address fields are reported as they are to the credit bureaus and entering anything other than actual addresses can cause credit reports to be incorrect.**