

The Customer Services Interface User Guide

Introduction:

The Customer Services interface is a SpringBoot application, which can drive back-end banking data, via a series of restful API calls, made to a zOS Connect EE server, which in turn, routes the requests to your CICS region (for more detailed information about the restful APIs please refer to the “CBSA Restful API guide” in the /doc folder)

The business justification for the Customer Services interface:

“CBSA Bank wants to reduce people’s queuing time in its branches, so “queue busters” will be deployed at the busiest times. These are staff armed with a tablet, who walk the queue and who can perform some of the functions of the Teller. Thus reducing customer wait times and alleviating pressure on the Tellers. “

The bank doesn’t want the queue busters to become a target for robbery, so the tasks that they can perform (via the Customer Services interface) are more administrative in nature. For handling money (paying it in, taking it out, transferring it or dealing with cheques) the customer will STILL need to see a CBSA Bank Teller who will utilise the BMS or Liberty interface to perform those functions (further information about the Teller’s interfaces can be found in the /doc folder under “CBSA User Guide” and “CBSA Liberty UI User Guide”).

Queue busters can attend to things like:

- Account or customer enquiries
- Updating customer details (e.g. changes of address, or name changes)
- The creating of new customers
- Deleting a customer (when a customer leaves or dies)
- Updating account details (increasing overdraft limits etc.)
- The opening of new accounts
- Account deletion (if the customer wants to close any of their accounts)

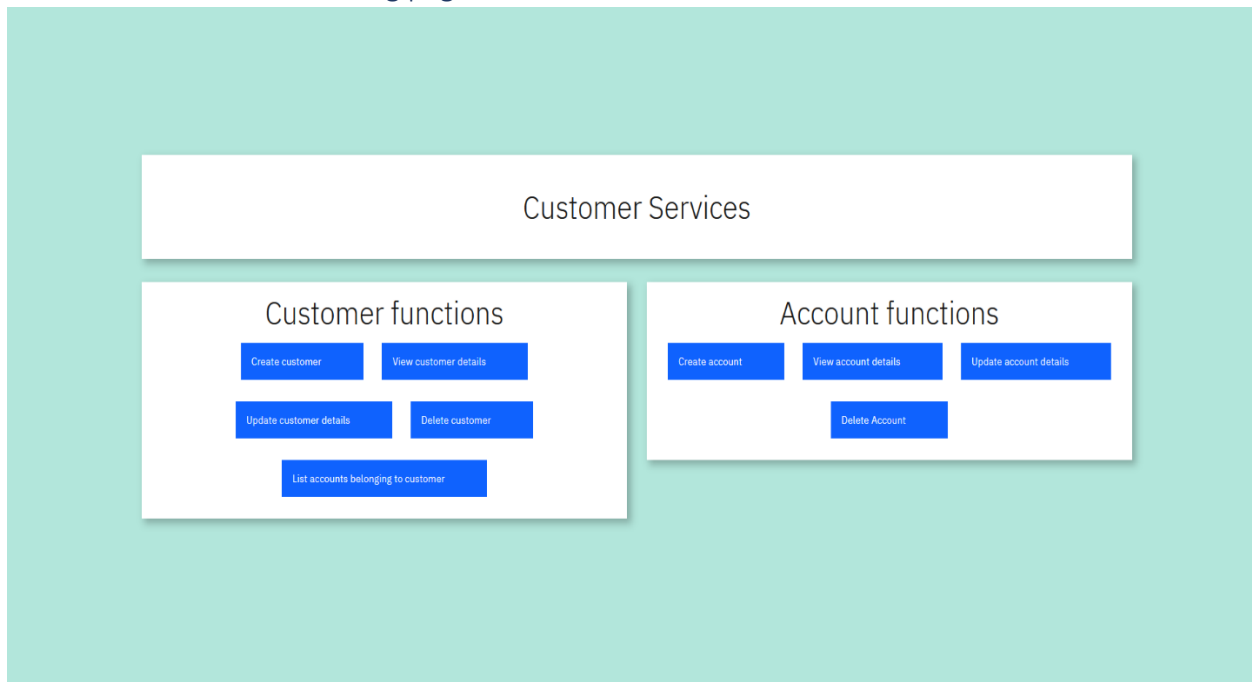
The restful APIs can all be utilised directly WITHOUT using the Customer Services interface, but we have provided the Customer Services interface, and the Springboot source code, to demonstrate the restful APIs straight out of the box. Additionally, the Springboot application source code may also be utilised in the future, to add or extend functionality. The functionality in the Customer Services interface, mimics functions provided in the BMS and Liberty UI interfaces (as used by the Teller).

Accessing the Customer Services Interface:
It can be accessed via a URL structured as follows:

<http://your-host-name:your-host-port-number/customerservices-1.1-SNAPSHOT/>

(* as part of the installation process, you will have previously assigned your own hostname and port number for the Customer Services interface to utilise).

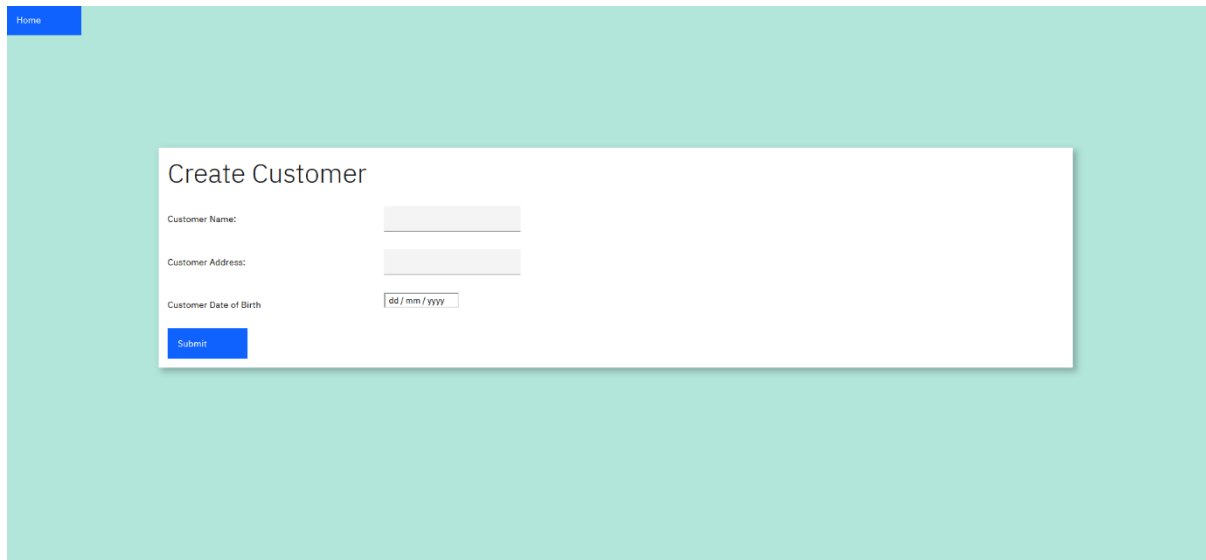
The Customer Services landing page:



The landing page is the start point for accessing all of the Customer Service functionality. To initiate each function simply click on its associated blue function button.

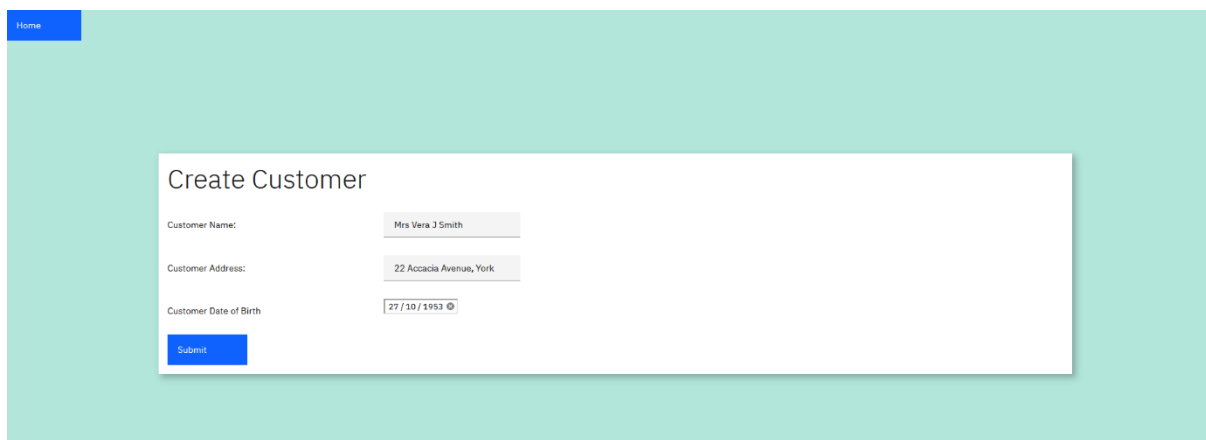
Create a Customer:

Accounts may only exist if they belong to an associated customer. To create a new customer, click on the “Create customer” button on the landing page.



The screenshot shows a web application with a teal background. In the top-left corner, there is a blue button labeled 'Home'. Centered on the page is a white rectangular form titled 'Create Customer'. The form contains three input fields: 'Customer Name:', 'Customer Address:', and 'Customer Date of Birth:'. The date field has a placeholder 'dd / mm / yyyy'. A blue 'Submit' button is located at the bottom left of the form.

Next, provide a Customer Name (which is comprised of a title, first name, middle initial, and surname), and the Customer’s Address and their Date of Birth (in DD/MM/YYYY format).



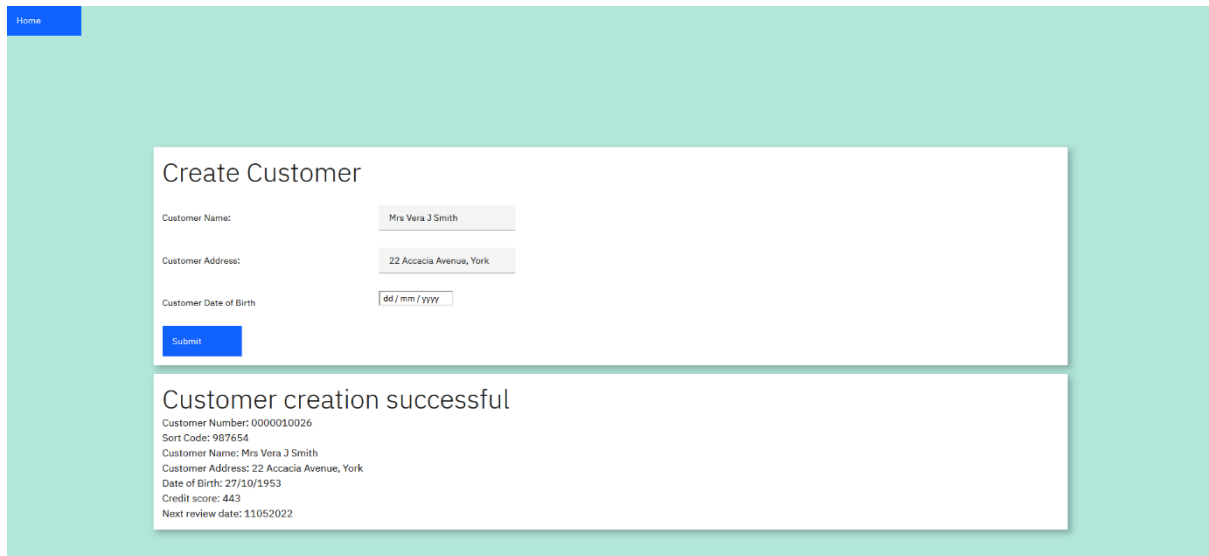
This screenshot shows the same 'Create Customer' form, but now the input fields are populated. The 'Customer Name' field contains 'Mrs Vera J Smith', the 'Customer Address' field contains '22 Accacia Avenue, York', and the 'Customer Date of Birth' field contains '27 / 10 / 1953'. The blue 'Submit' button remains at the bottom left.

Once you are happy, click on the “Submit” button.

Under the covers, validation will be carried out. Should something fail a validation check, you will be prompted to correct any invalid data and resubmit.

Once the details have been validated, a restful API call gets executed which initiates a call to one of CBSA’s existing back-end programs, to create the customer information. Assuming that the call was

successful, confirmation will be returned:



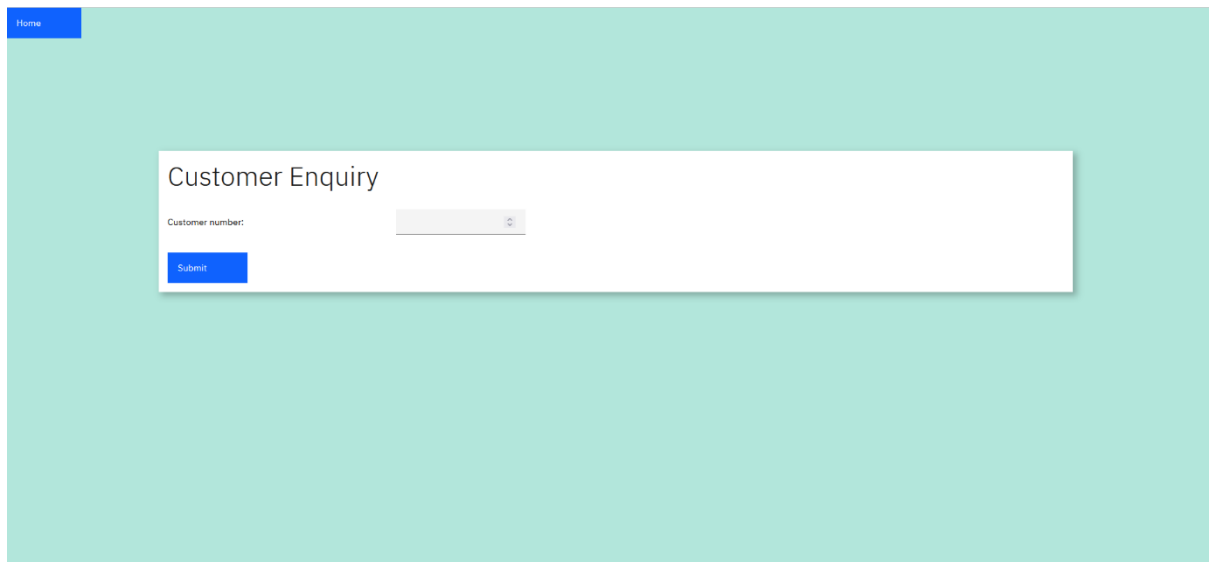
The screenshot shows a web interface with a teal background. In the top left corner, there is a blue button labeled "Home". The main content area contains two white boxes. The top box is titled "Create Customer" and contains three input fields: "Customer Name:" with the value "Mrs Vera J Smith", "Customer Address:" with the value "22 Accacia Avenue, York", and "Customer Date of Birth:" with a date picker showing "dd / mm / yyyy". Below these fields is a blue "Submit" button. The bottom box is titled "Customer creation successful" and displays the following details: Customer Number: 0000010026, Sort Code: 987654, Customer Name: Mrs Vera J Smith, Customer Address: 22 Accacia Avenue, York, Date of Birth: 27/10/1953, Credit score: 443, and Next review date: 11052022.

(If for some reason a call was unsuccessful, a suitable error reply will be returned).

Upon completion of the new customer, simply press “Home” to return to the landing page.

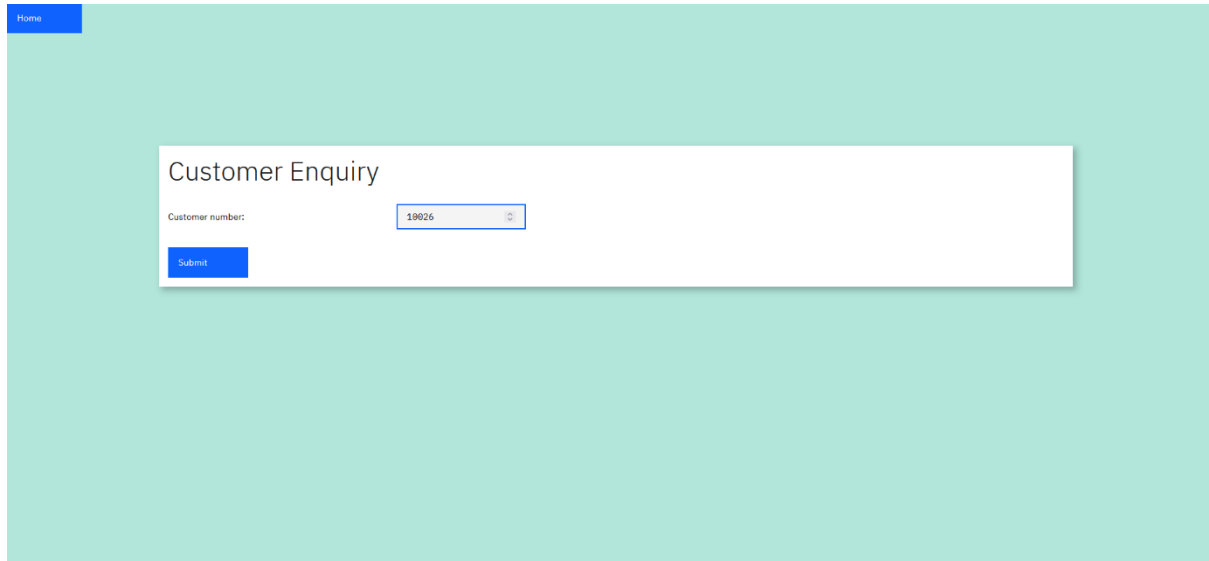
Customer Enquiry:

To see customer details click the “View customer details” button on the landing page:



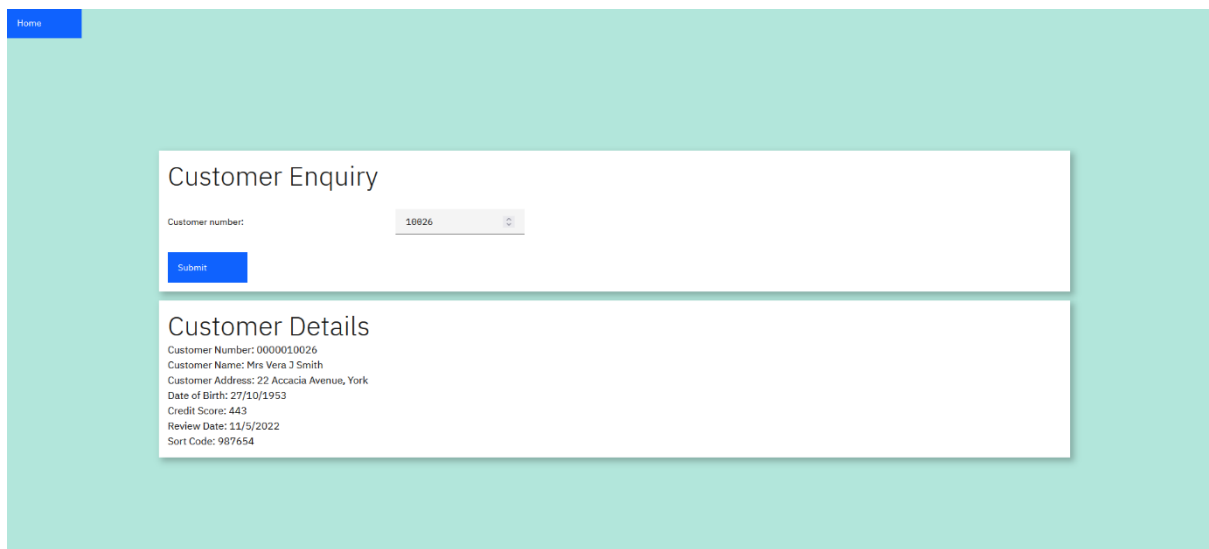
The screenshot shows a web interface with a teal background. In the top left corner, there is a blue button labeled "Home". The main content area contains a white box titled "Customer Enquiry". Inside this box, there is a label "Customer number:" followed by a text input field. Below the input field is a blue "Submit" button.

Enter a customer number:



The screenshot shows a web application interface with a teal background. At the top left, there is a blue button labeled "Home". In the center, there is a white box titled "Customer Enquiry". Inside this box, there is a label "Customer number:" followed by a text input field containing the value "10026". Below the input field is a blue button labeled "Submit".

and click "Submit":



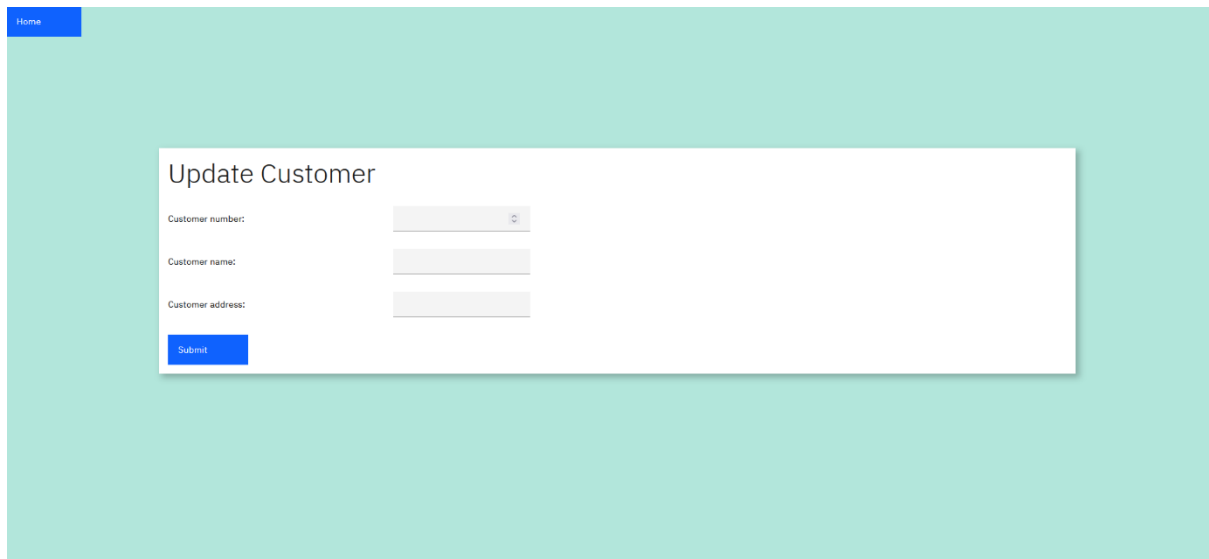
The screenshot shows the same web application interface as before, but now it displays the results of the enquiry. The "Customer Enquiry" box is still present, but below it, a new white box titled "Customer Details" has appeared. This box contains the following information:

- Customer Number: 0000010026
- Customer Name: Mrs Vera J Smith
- Customer Address: 22 Acacia Avenue, York
- Date of Birth: 27/10/1953
- Credit Score: 443
- Review Date: 11/5/2022
- Sort Code: 987654

And the details will be returned (see above).

Update a Customer:

To amend customer details click the “Update customer details” button on the landing page:



Home

Update Customer

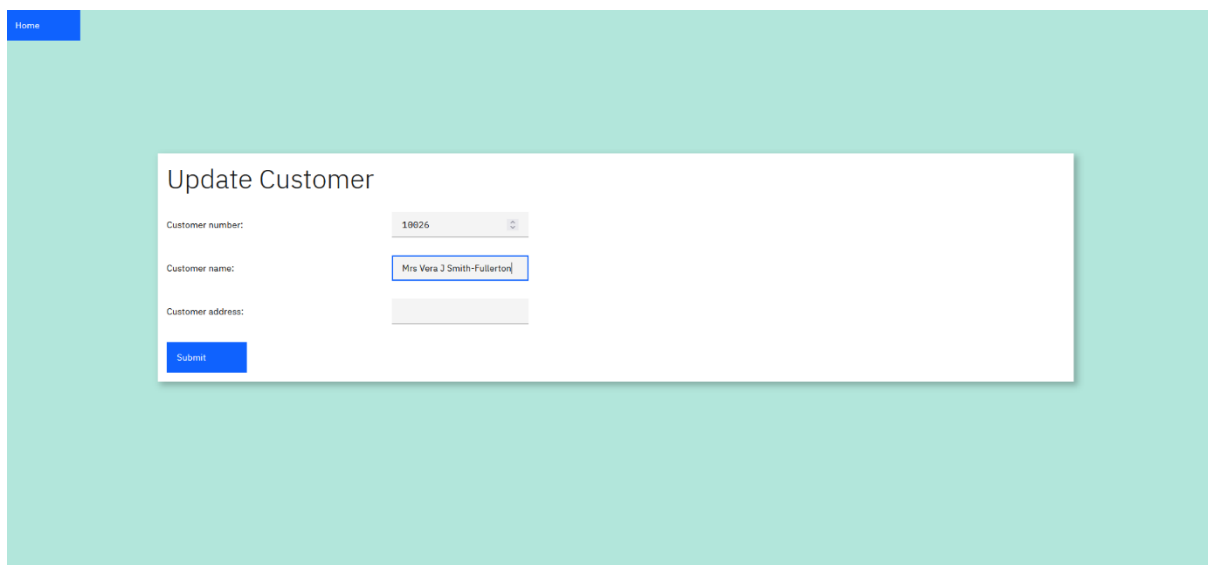
Customer number:

Customer name:

Customer address:

[Submit](#)

Supply the customer number, and an amended name (to perform a name change):



Home

Update Customer

Customer number:

Customer name:

Customer address:

[Submit](#)

And press “Submit”

Home

Update Customer

Customer number: 18926

Customer name: Mrs Vera J Smith-Fullerton

Customer address:

Submit

Account updated

Customer Number: 0000010026
Sort Code: 987654
Customer Name: Mrs Vera J Smith-Fullerton
Customer Address: 22 Accacia Avenue, York
Date of Birth: 27/10/1953
Credit score: 443
Next review date: 11052022

Or you can supply the customer number and an amended address:

Home

Update Customer

Customer number: 18926

Customer name:

Customer address: 123 Beech Avenue , Tring

Submit

And click Submit:

Home

Update Customer

Customer number: 18926

Customer name:

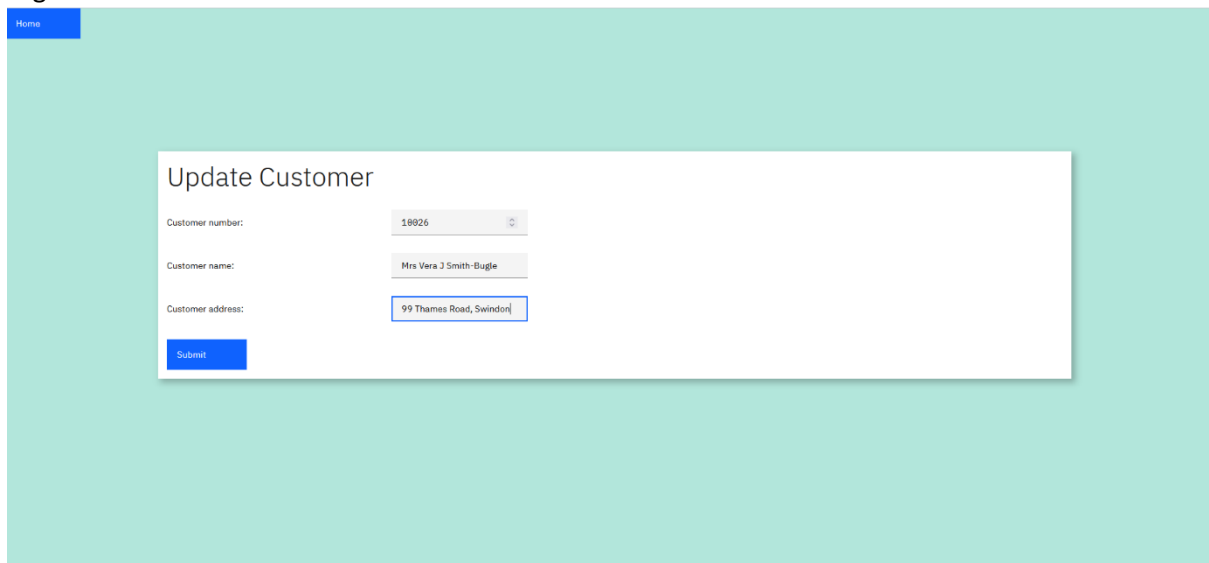
Customer address: 123 Beech Avenue , Tring

Submit

Account updated

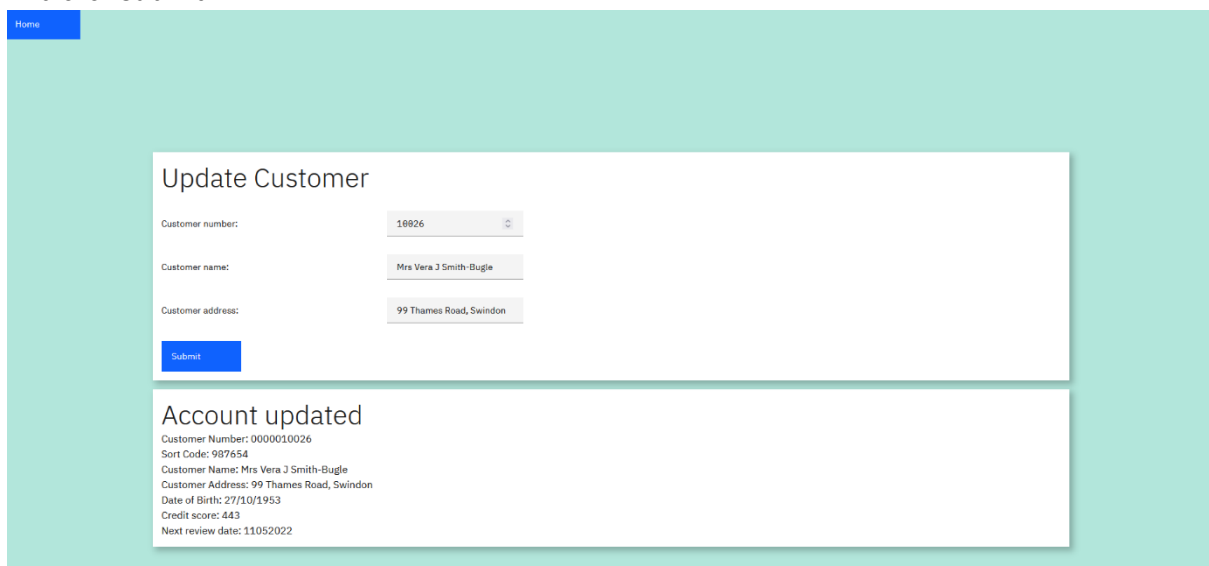
Customer Number: 0000010026
Sort Code: 987654
Customer Name: Mrs Vera J Smith-Fullerton
Customer Address: 123 Beech Avenue , Tring
Date of Birth: 27/10/1953
Credit score: 443
Next review date: 11052022

Or you can provide the customer number, and an amended name and an amended address all together:



The screenshot shows a web application interface with a teal background. In the top left corner, there is a blue button labeled "Home". Centered on the page is a white rectangular form titled "Update Customer". The form contains three input fields: "Customer number:" with the value "18826", "Customer name:" with the value "Mrs Vera J Smith-Bugle", and "Customer address:" with the value "99 Thames Road, Swindon". Below these fields is a blue "Submit" button.

And click Submit:



This screenshot shows the same web application interface as the previous one, but with an additional confirmation message displayed below the "Update Customer" form. The message is titled "Account updated" and lists the following details: Customer Number: 0000010026, Sort Code: 987654, Customer Name: Mrs Vera J Smith-Bugle, Customer Address: 99 Thames Road, Swindon, Date of Birth: 27/10/1953, Credit score: 443, and Next review date: 11052022. The "Submit" button remains visible above the message.

The change/s should be acknowledged (as shown above).

Clicking “Home” returns back to the landing page.

List Accounts belonging to a Customer:

To display the accounts for a particular customer, click on “List accounts belonging to customer”:

Home

List Accounts belonging to Customer

Customer number:

Supply a Customer number:

Home

List Accounts belonging to Customer

Customer number:

naam: cba-test1@jysilbm.com

And click "Submit":

Home

List Accounts belonging to Customer

Customer number:

[Submit](#)

Accounts belonging to customer 2345:

Account Number: 00007012 Sort Code: 987654 Customer Number: 0000002345 Account Type: ISA Available Balance: 47083.82 Actual Balance: 47083.82 Interest Rate: 2.10 Overdraft: 0 Account Opened: 14/09/2003 Next Statement Date: 01/08/2021 Last Statement Date: 01/07/2021
Account Number: 00007013 Sort Code: 987654 Customer Number: 0000002345 Account Type: SAV/DMS Available Balance: 312415.13 Actual Balance: 312415.13 Interest Rate: 1.75 Overdraft: 0 Account Opened: 26/10/1966 Next Statement Date: 01/08/2021 Last Statement Date: 01/07/2021

And the associated accounts will be returned. In this example, Customer 2345 has two accounts (7012 and 7013) associated with it .

Click “Home” to return to the landing page.

Customer removal/deletion:

To remove a customer, click on “Delete customer” from the landing page:

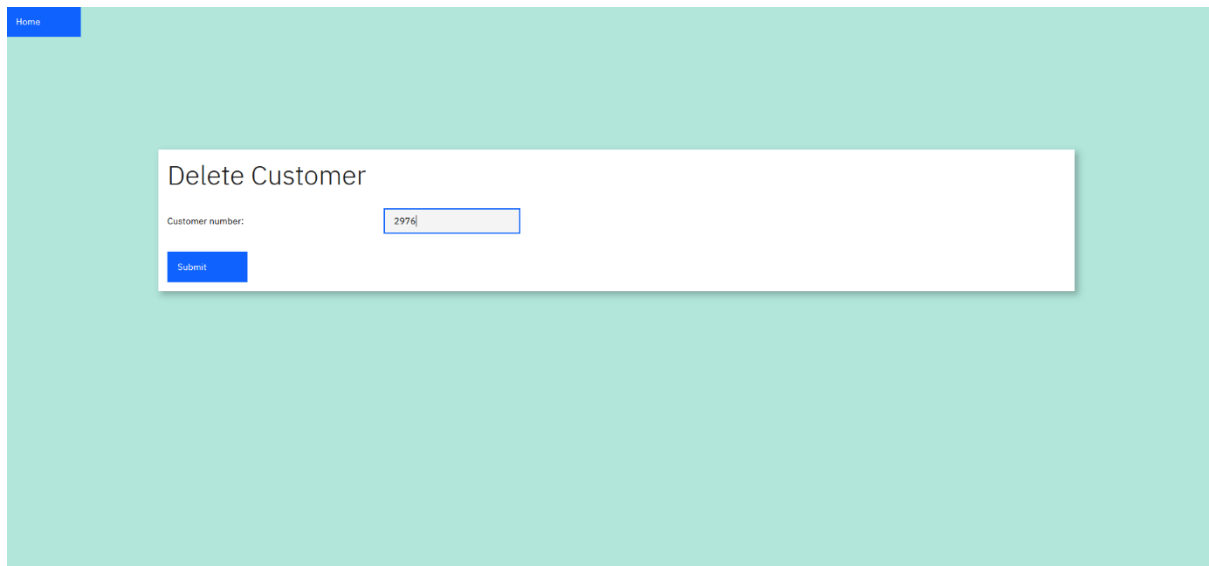
Home

Delete Customer

Customer number:

[Submit](#)

Supply the customer number:



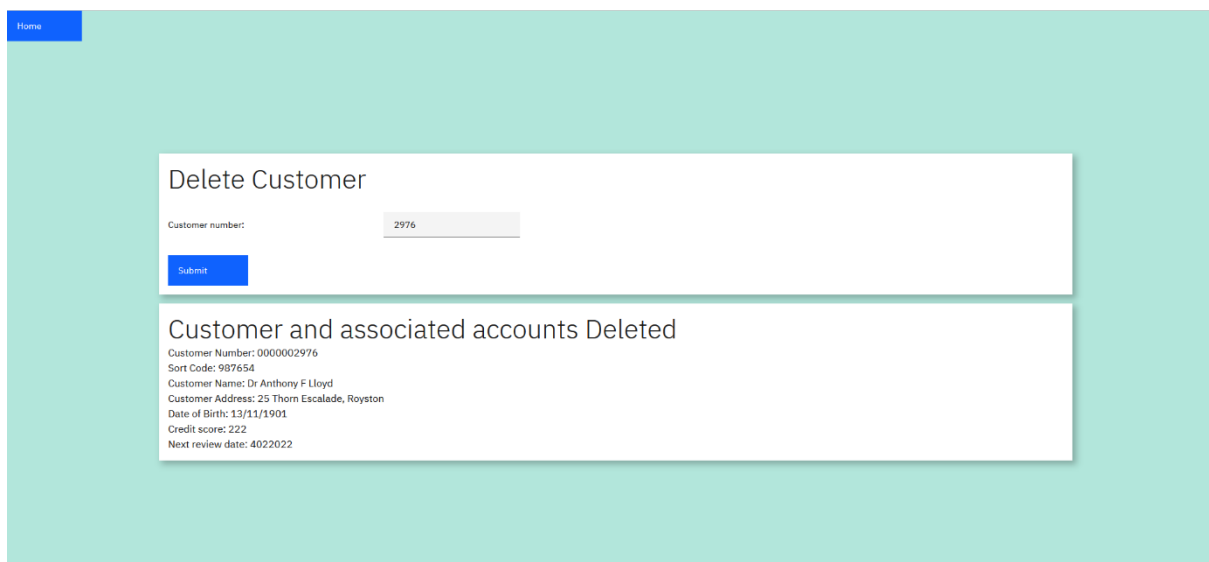
Home

Delete Customer

Customer number:

[Submit](#)

And then click “Submit”:



Home

Delete Customer

Customer number:

[Submit](#)

Customer and associated accounts Deleted

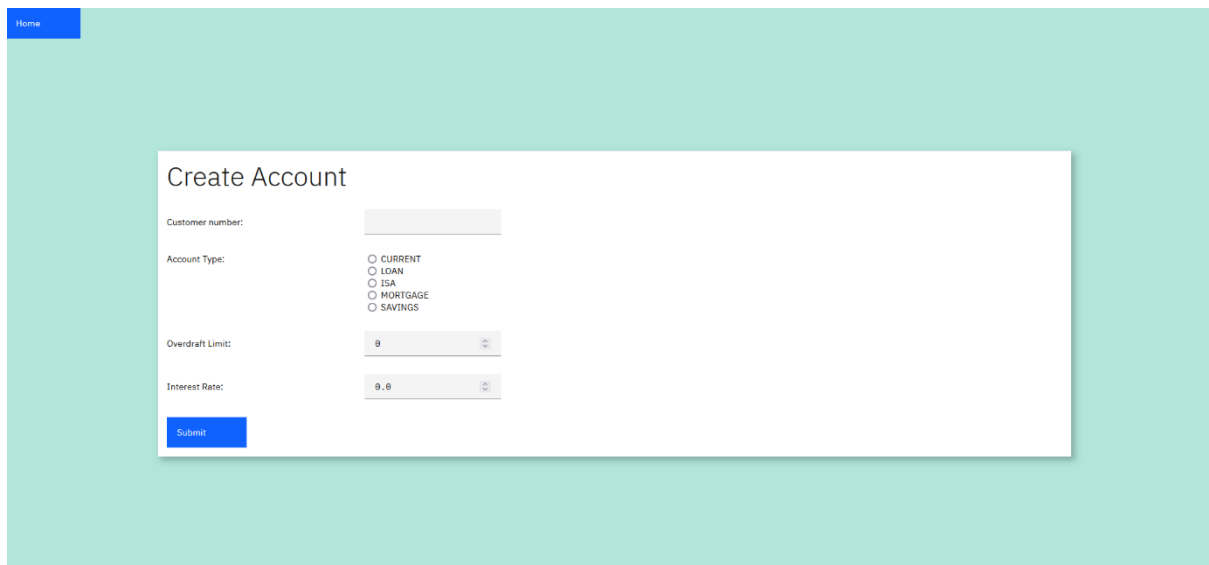
Customer Number: 0000002976
Sort Code: 987654
Customer Name: Dr Anthony F Lloyd
Customer Address: 25 Thorn Escalade, Royston
Date of Birth: 13/11/1901
Credit score: 222
Next review date: 4022022

If the request to delete the customer was successful, you should get a confirmation message (shown above). **NOTE** Deleting a customer also removes all associated accounts for that customer.

Click “Home” to return to the landing page.

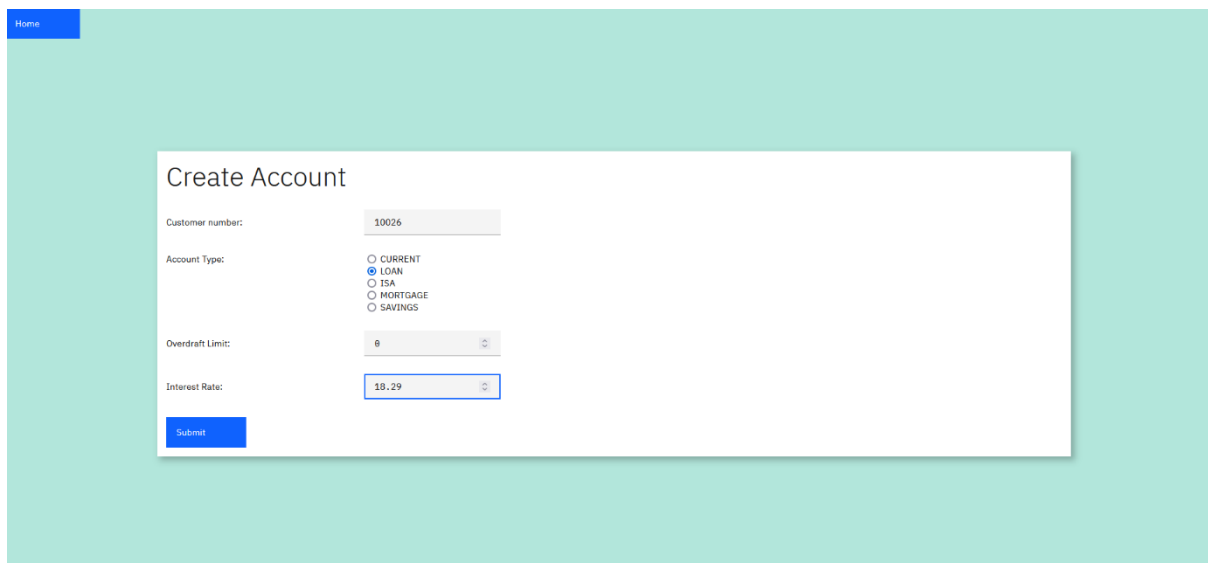
Account creation:

To create a new account for a Customer, click on “Create account”:



The screenshot shows a web application with a teal background and a blue 'Home' button in the top left. A white 'Create Account' form is centered. The form contains the following fields: 'Customer number:' with an empty text input; 'Account Type:' with four radio button options: CURRENT, LOAN, ISA, MORTGAGE, and SAVINGS; 'Overdraft Limit:' with a numeric input containing '0'; and 'Interest Rate:' with a numeric input containing '9.8'. A blue 'Submit' button is at the bottom left of the form.

Supply the customer number, and select a type of account from the radio buttons provided, and set the Overdraft limit and Interest rate (if applicable):



The screenshot shows the same 'Create Account' form, but now with data entered. The 'Customer number:' field contains '10026'. The 'Account Type:' radio buttons are now checked: LOAN is selected, while CURRENT, ISA, MORTGAGE, and SAVINGS are unselected. The 'Overdraft Limit:' field still contains '0'. The 'Interest Rate:' field now contains '18.29'. The blue 'Submit' button remains at the bottom left.

Then click Submit:

The screenshot shows a web application with a teal background. In the top left corner, there is a blue button labeled "Home". The main content area contains two white boxes. The top box is titled "Create Account" and contains the following fields: "Customer number:" with a text input containing "10004", "Account Type:" with radio buttons for "CURRENT", "LOAN" (selected), "ISA", "MORTGAGE", and "SAVINGS", "Overdraft Limit:" with a text input containing "0", and "Interest Rate:" with a text input containing "18.29". Below these fields is a blue "Submit" button. The bottom box is titled "Account creation successful" and contains the following details: "Details: Account Number: 00029946", "Sort Code: 907654", "Account Type: LOAN", "Customer Number: 0000010026", "Interest Rate: 18.29", "Overdraft Limit: 0.00", "Available Balance: 0.00", "Actual Balance: 0.00", "Account Opened: 27/04/2022", "Last Statement Date: 27/04/2022", and "Next Statement Date: 27/05/2022".

Associated details belonging to the new account get returned upon successful completion (see above).

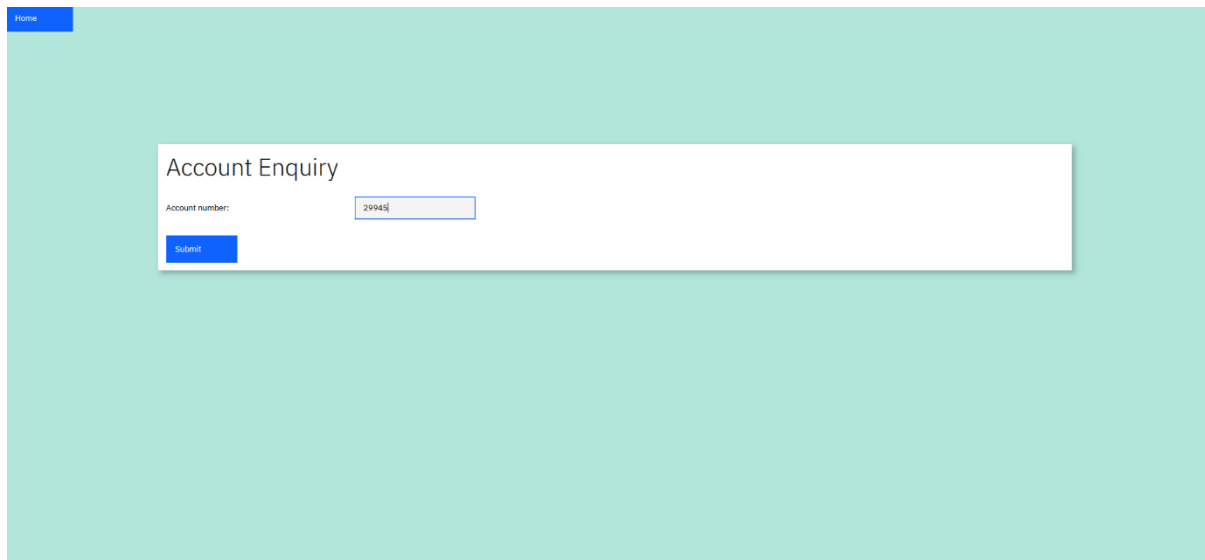
To return to the landing page click "Home".

Account enquiries:

To enquire on an account, click on "View account details" from the landing page:

The screenshot shows the same web application as the first image. The main content area contains a single white box titled "Account Enquiry". It has a label "Account number:" followed by a text input field. Below the input field is a blue "Submit" button.

Supply an account number:



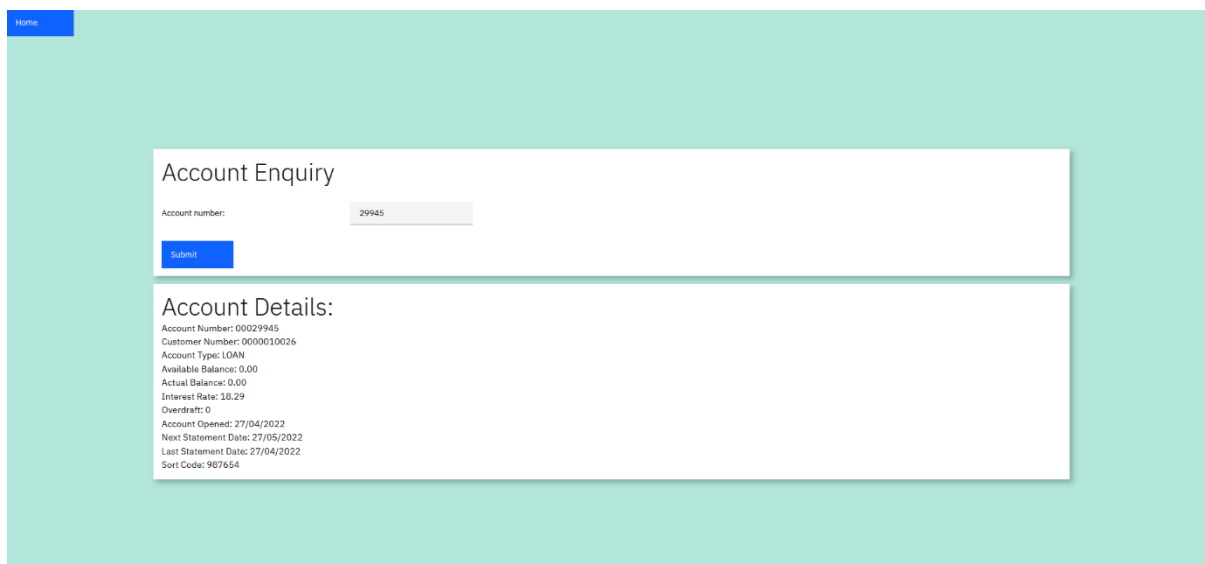
Home

Account Enquiry

Account number:

[submit](#)

Then click “Submit”:



Home

Account Enquiry

Account number:

[submit](#)

Account Details:

Account Number: 00029945
Customer Number: 0000010026
Account Type: LOAN
Available Balance: 0.00
Actual Balance: 0.00
Interest Rate: 16.29
Overdraft: 0
Account Opened: 27/04/2022
Next Statement Date: 27/05/2022
Last Statement Date: 27/04/2022
Sort Code: 987654

And the account information data is returned (as shown above).

To return to the landing page click “Home”.

Update Account information:

To amend account information, click on “Update account details” from the landing page:

The screenshot shows a web application with a teal background and a blue 'Home' button in the top left. A white 'Update Account' form is centered. The form contains the following fields: 'Account number' with a text input containing '6'; 'Account Type' with four radio button options: 'CURRENT', 'LOAN', 'ISA', 'MORTGAGE', and 'SAVINGS'; 'Interest Rate' with a text input; and 'Overdraft Limit' with a text input. A blue 'Submit' button is at the bottom left of the form.

Supply the account number that you wish to update, then you have the option to amend the account type (for example to turn a loan account into a mortgage account), along with updating the interest rate and overdraft limit. You have the choice of changing the account type, interest rate or overdraft limit individually or you can change any combination together:

This screenshot shows the same 'Update Account' form, but with updated values. The 'Account number' field now contains '29945'. The 'Account Type' radio buttons are now checked: 'MORTGAGE' is selected with a blue dot, while 'CURRENT', 'LOAN', 'ISA', and 'SAVINGS' are unselected. The 'Interest Rate' field now contains '5' and is highlighted with a blue border. The 'Overdraft Limit' field still contains '0'. The blue 'Submit' button remains at the bottom left.

(in this example we change the account type and interest rate)

Click “Submit”:

The screenshot shows a web interface with a teal background. In the top left corner, there is a blue button labeled "Home". The main content area contains two white boxes. The top box is titled "Update Account" and contains the following fields: "Account number:" with a text input containing "29945", "Account Type:" with four radio buttons (CURRENT, LOAN, ISA, MORTGAGE, SAVINGS), "Interest Rate:" with a text input containing "5", and "Overdraft Limit:" with a text input containing "0". Below these fields is a blue "Submit" button. The bottom box is titled "Account updated" and contains the following text: "Account Number: 00029945", "Sort Code: 907654", "Account Type: MORTGAGE", "Customer Number: 0000010026", "Interest Rate: 5.00", "Overdraft Limit: 0", "Available Balance: 0.00", "Actual Balance: 0.00", "Account Opened: 27/04/2022", "Last Statement Date: 27/04/2022", and "Next Statement Date: 27/05/2022".

Confirmation of the change is provided upon successful completion.

To return to the landing page, click “Home”.

Account Deletion:

To remove an account click on “Delete account” from the landing page:

The screenshot shows a web interface with a teal background. In the top left corner, there is a blue button labeled "Home". The main content area contains a single white box titled "Delete Account". Inside this box, there is a label "Account number:" followed by a text input field. Below the input field is a blue "Submit" button.

Provide an account number:

Home

Delete Account

Account number:

[Submit](#)

And click “Submit”:

Home

Delete Account

Account number:

[Submit](#)

Account Deleted

Account Number: 00006932
Sort Code: 987654
Account Type: ISA
Customer Number: 0000002321
Interest Rate: 2.10
Overdraft Limit: 0
Available Balance: 926039.13
Actual Balance: 926039.13
Account Opened: 09/10/1943
Last Statement Date: 01/07/2021
Next Statement Date: 01/08/2021

Acknowledgement that the deletion has been successful is provided (see above).

To return to the landing page click “Home”.