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).

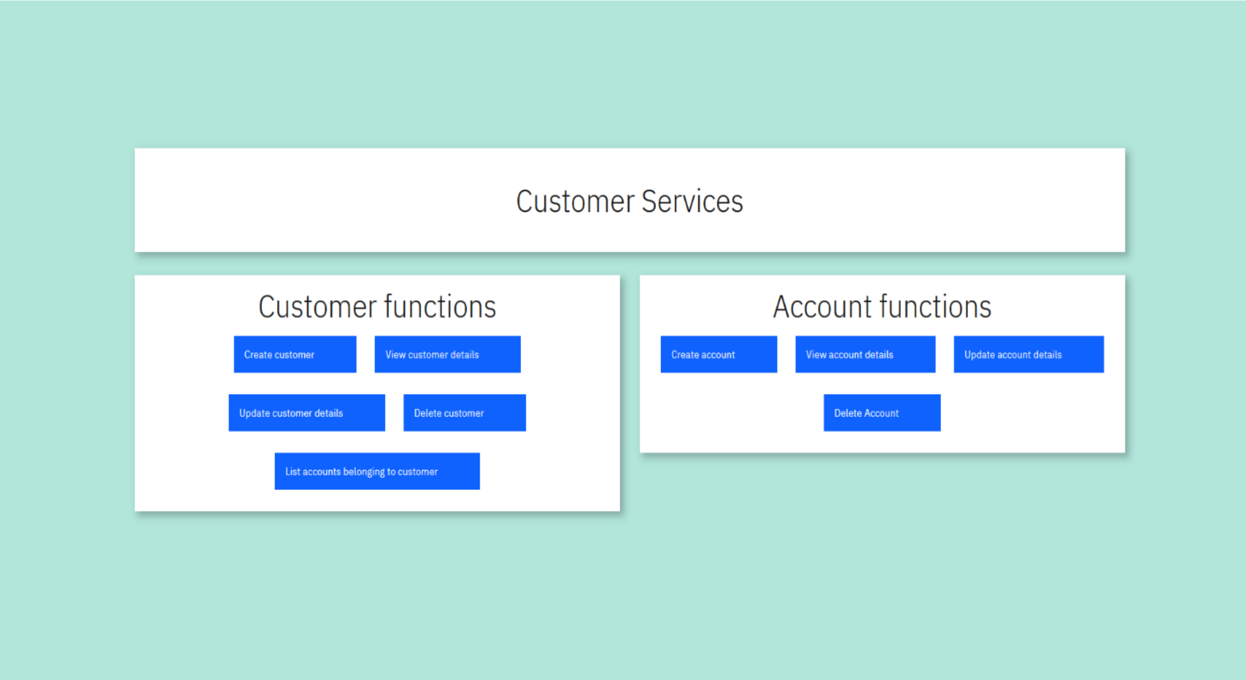
Accessing the Customer Services Interface:

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).

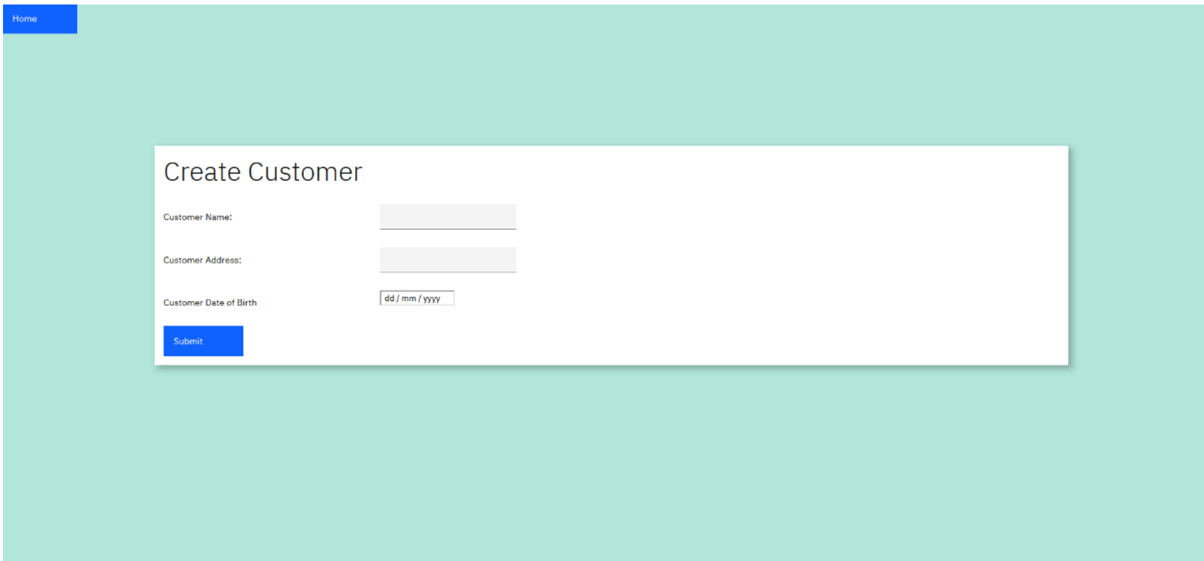
The Customer Services landing page:



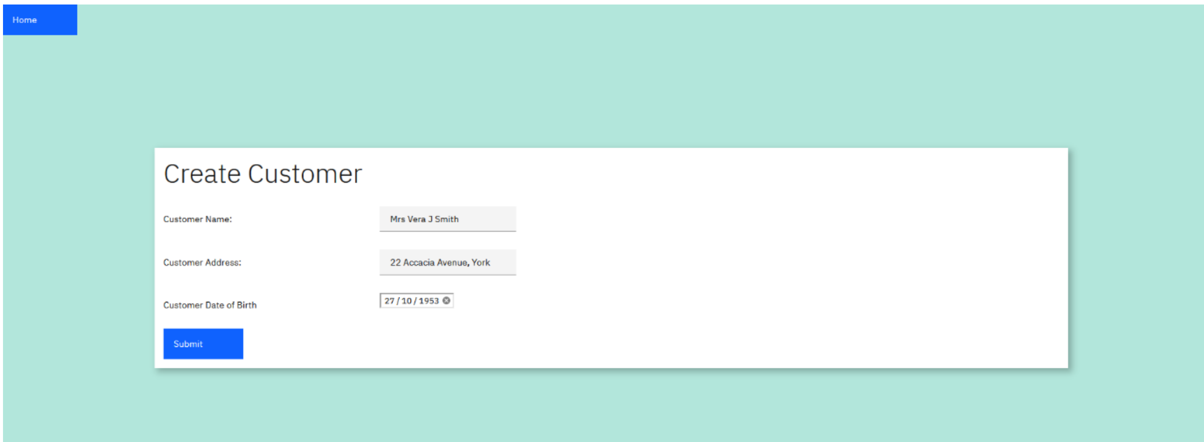
The landing page is the start point for accessing all of the Customer Service functionality. To initiate each function simply click on its associated blue function button.

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.



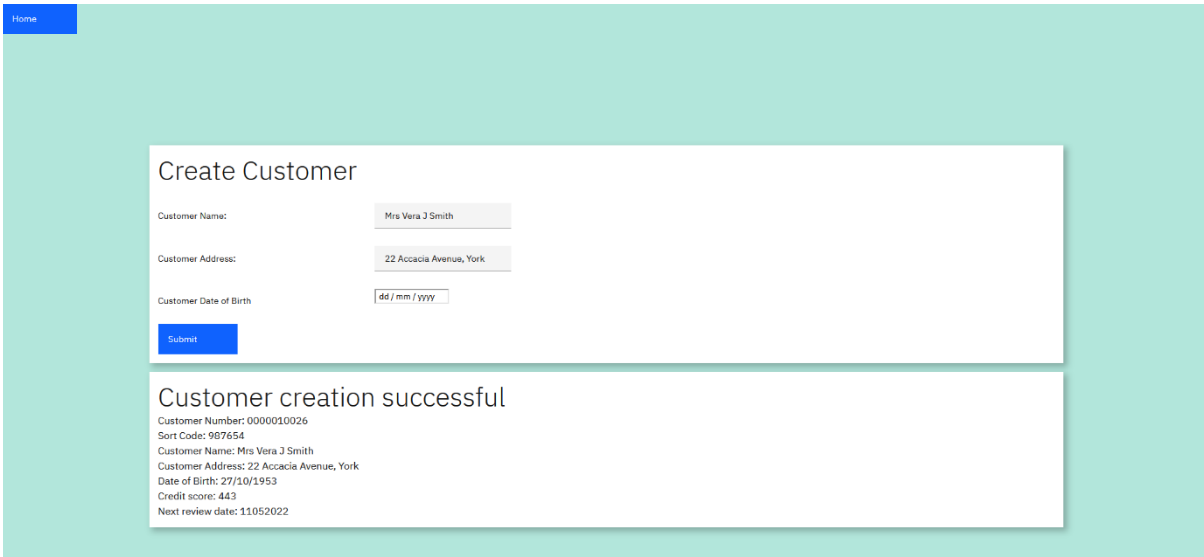
Next, provide a Customer Name (which is comprised of a title, first name, middle initial, and surname), and the Customer’s Address and their Date of Birth (in DD/MM/YYYY format).



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:

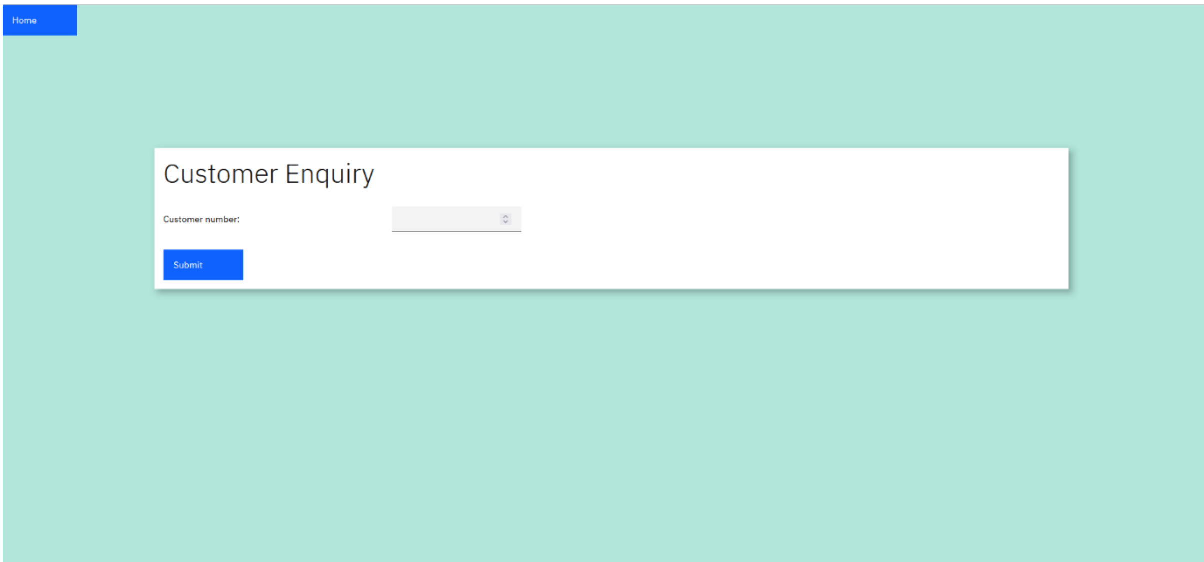


(If for some reason a call was unsuccessful, a suitable error reply will be returned).

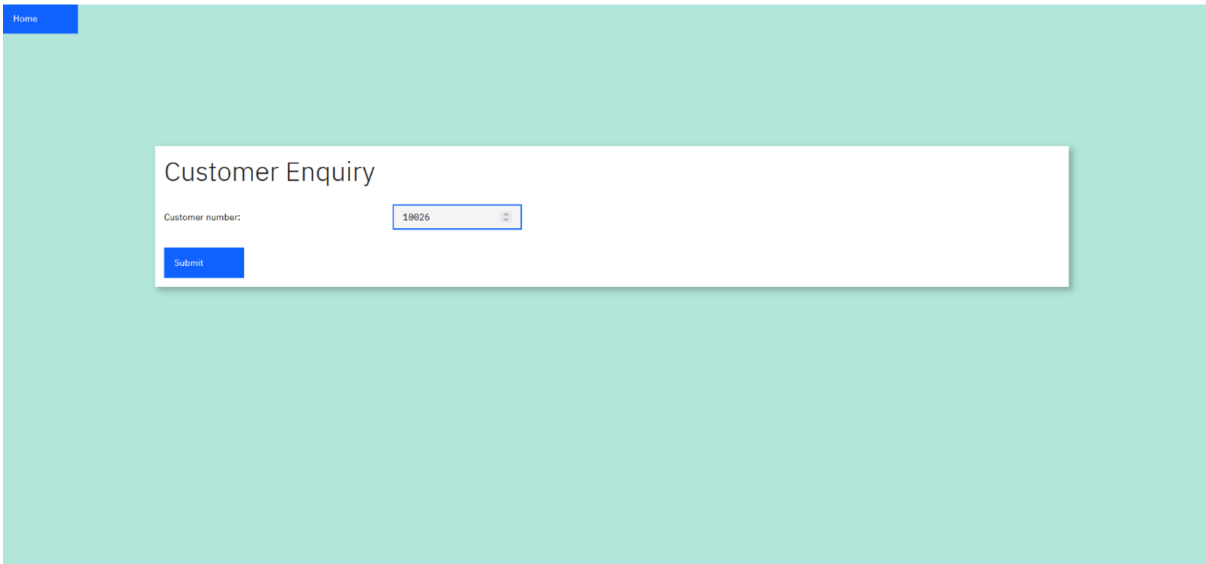
Upon completion of the new customer, simply press "Home" to return to the landing page.

Customer Enquiry:

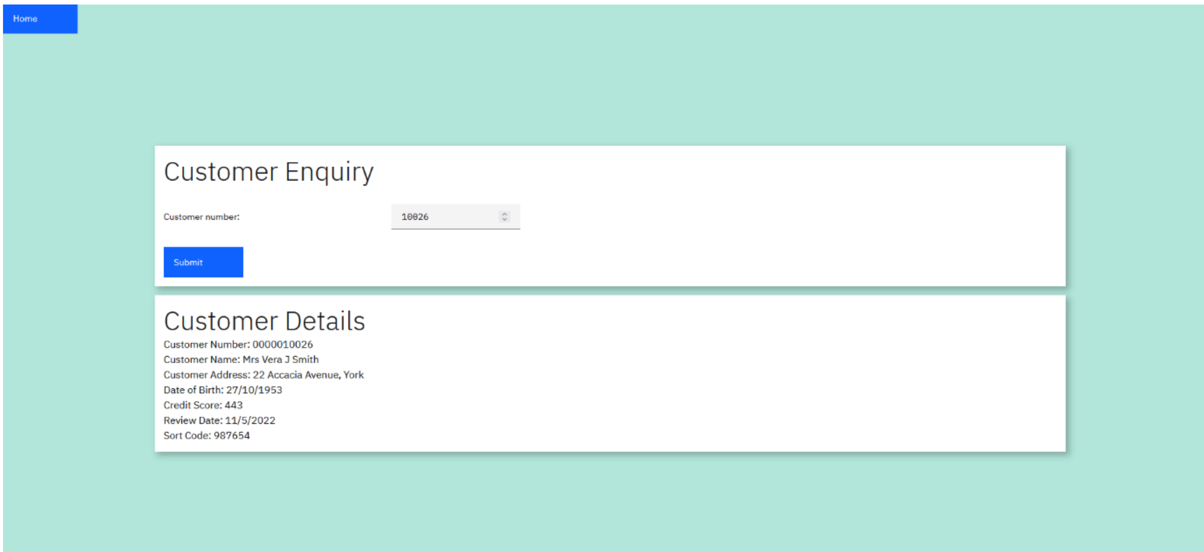
To see customer details click the "View customer details" button on the landing page:



Enter a customer number:



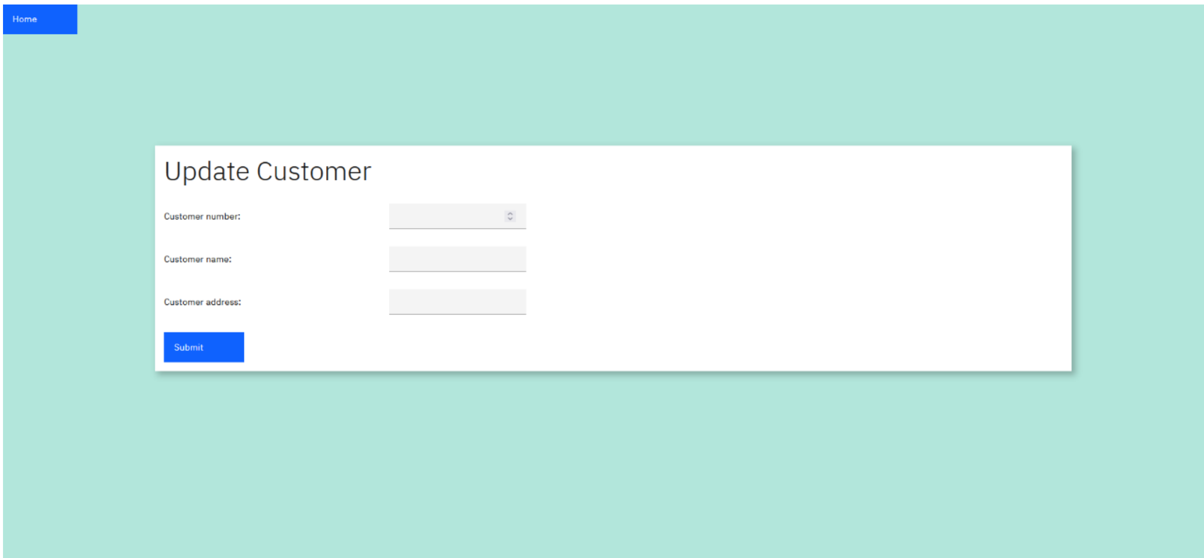
and click “Submit”:



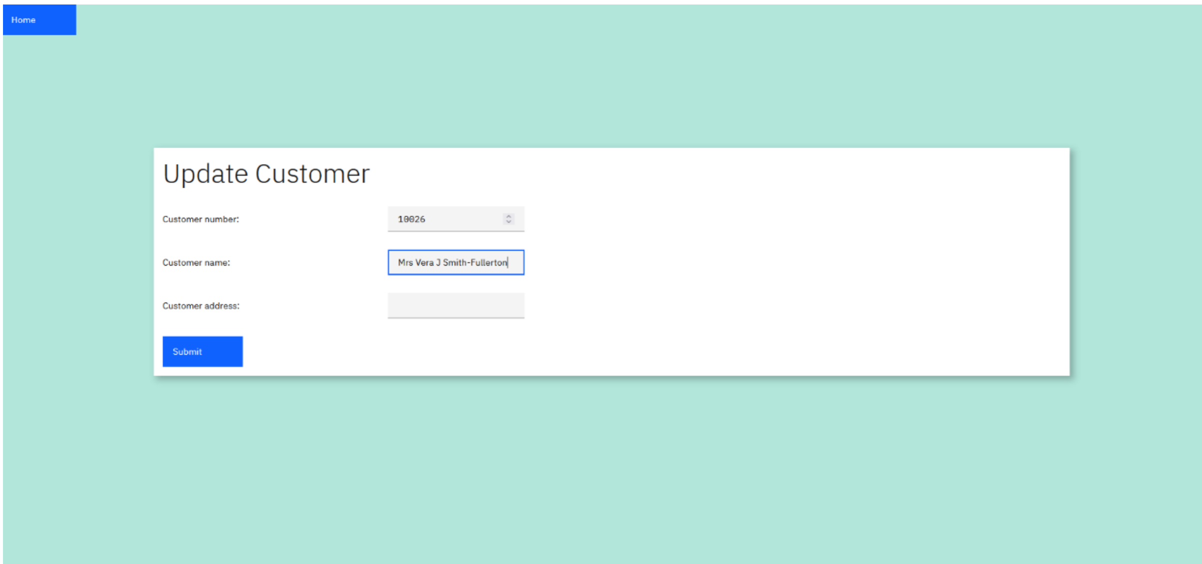
And the details will be returned (see above).

Update a Customer:

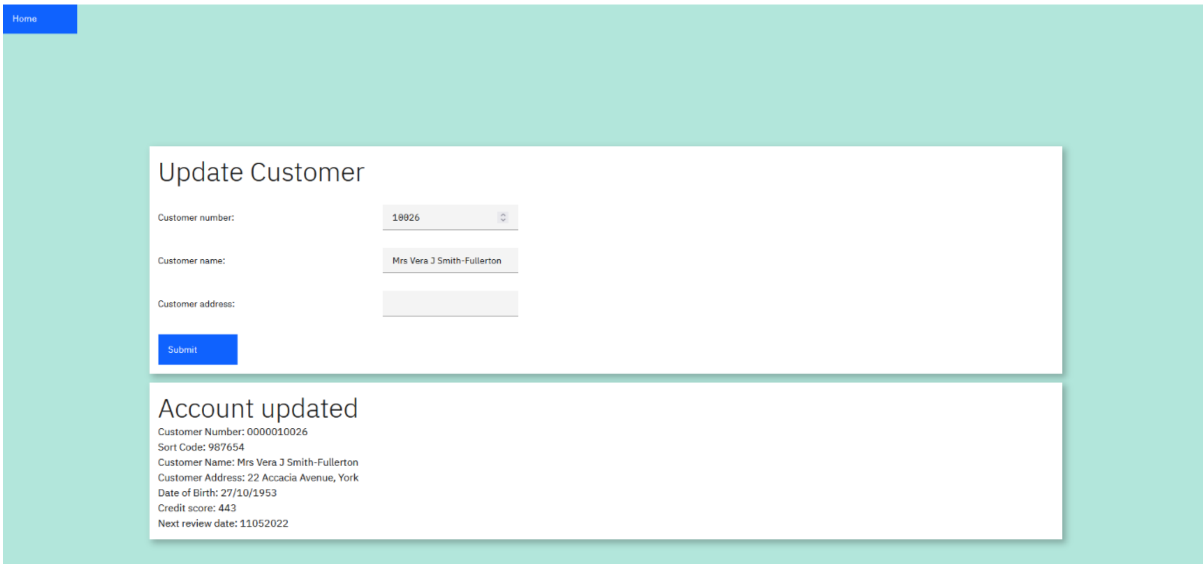
To amend customer details click the “Update customer details” button on the landing page:



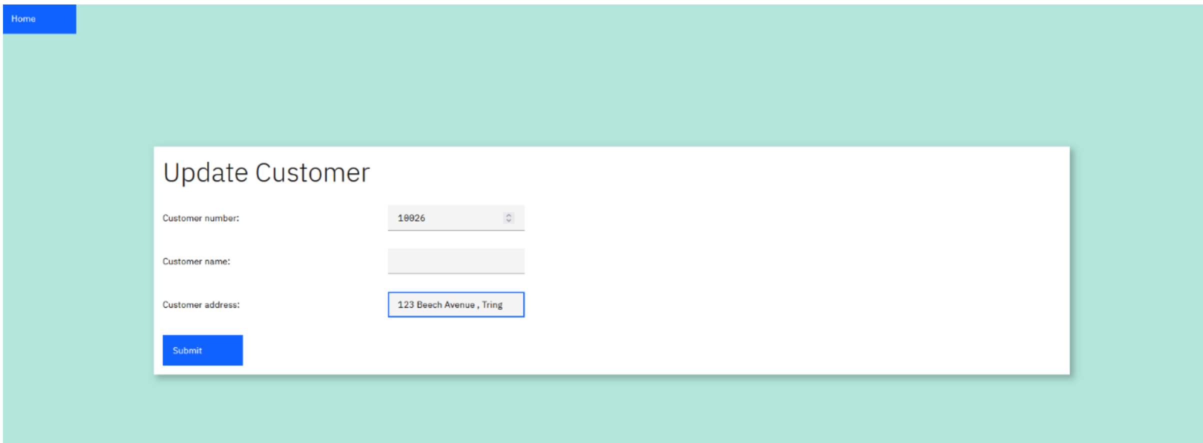
Supply the customer number, and an amended name (to perform a name change):



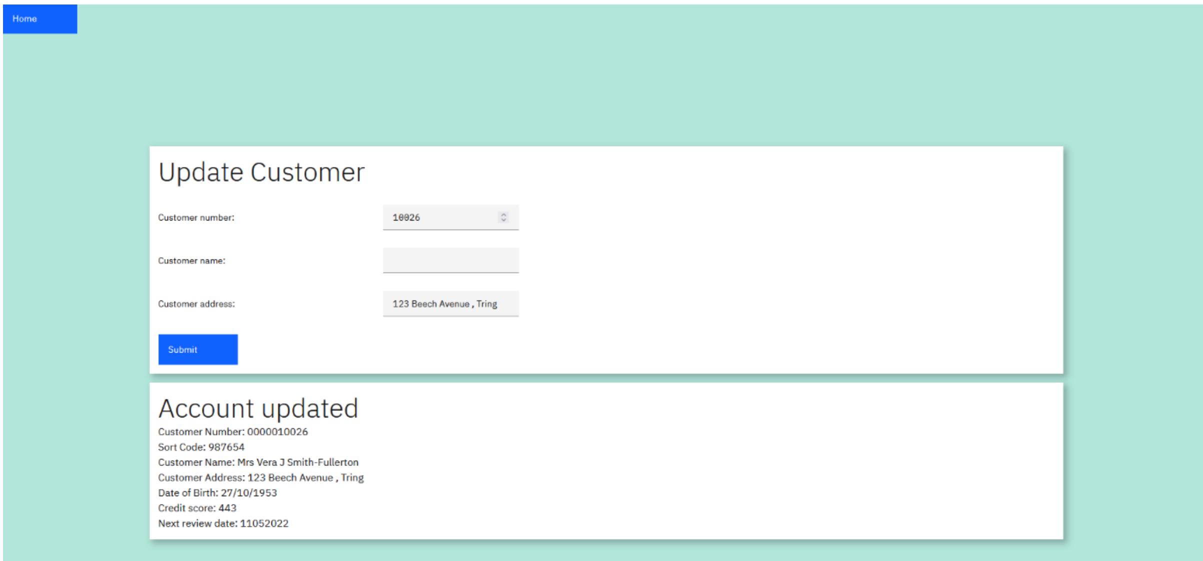
And press “Submit”



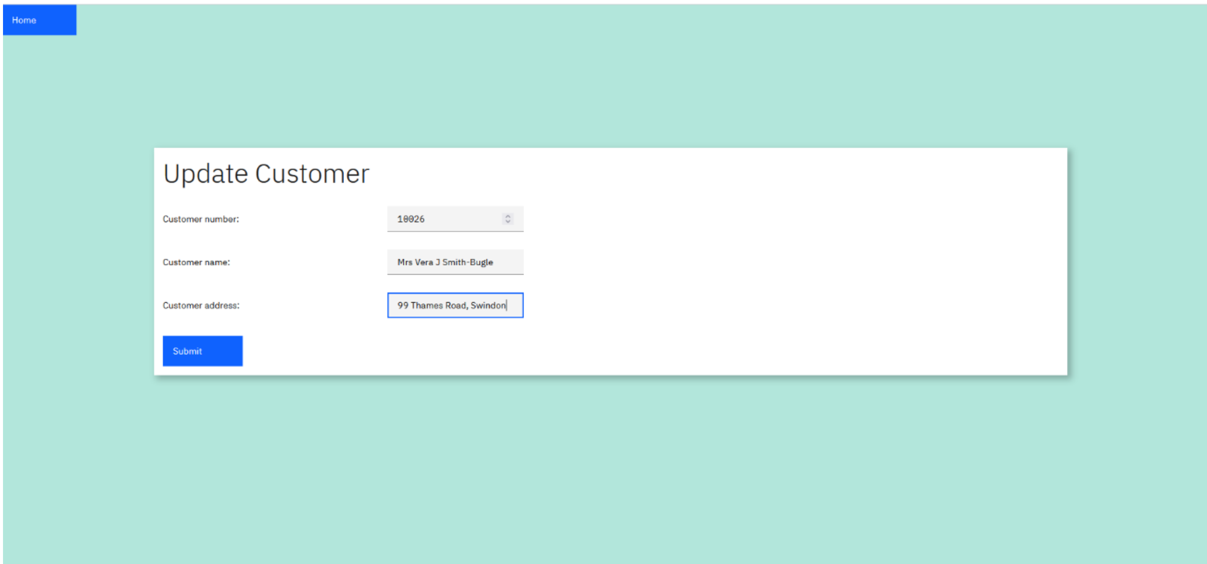
Or you can supply the customer number and an amended address:



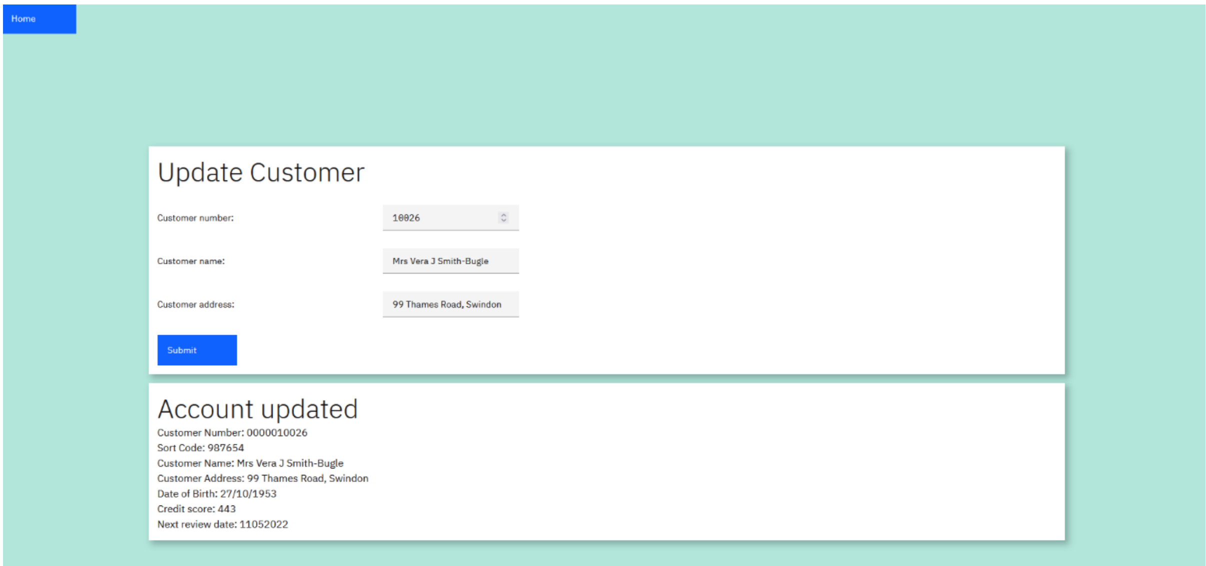
And click Submit:



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



And click Submit:

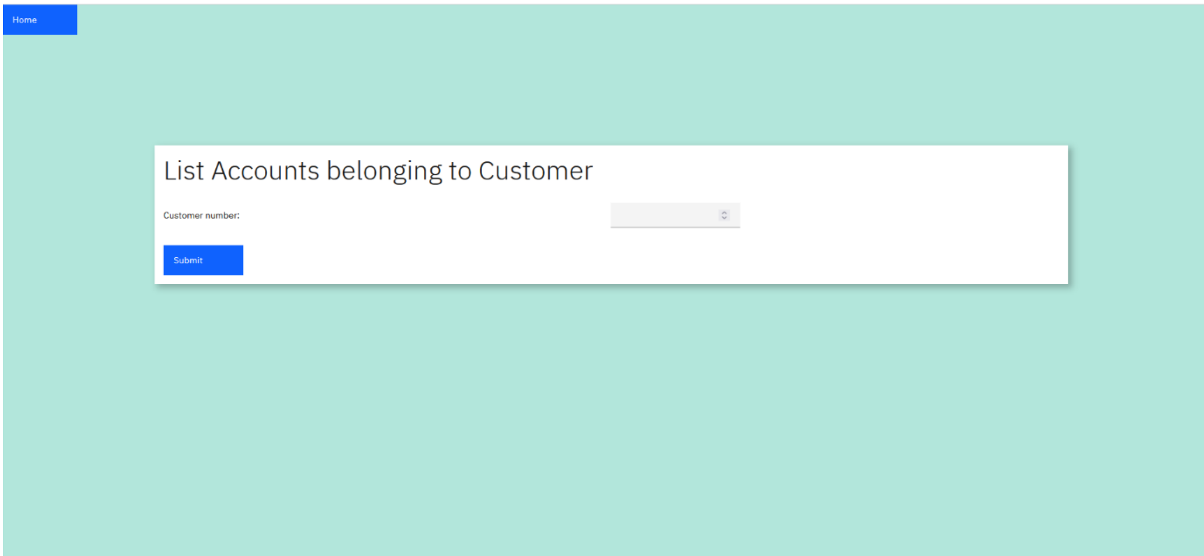


The change/s should be acknowledged (as shown above).

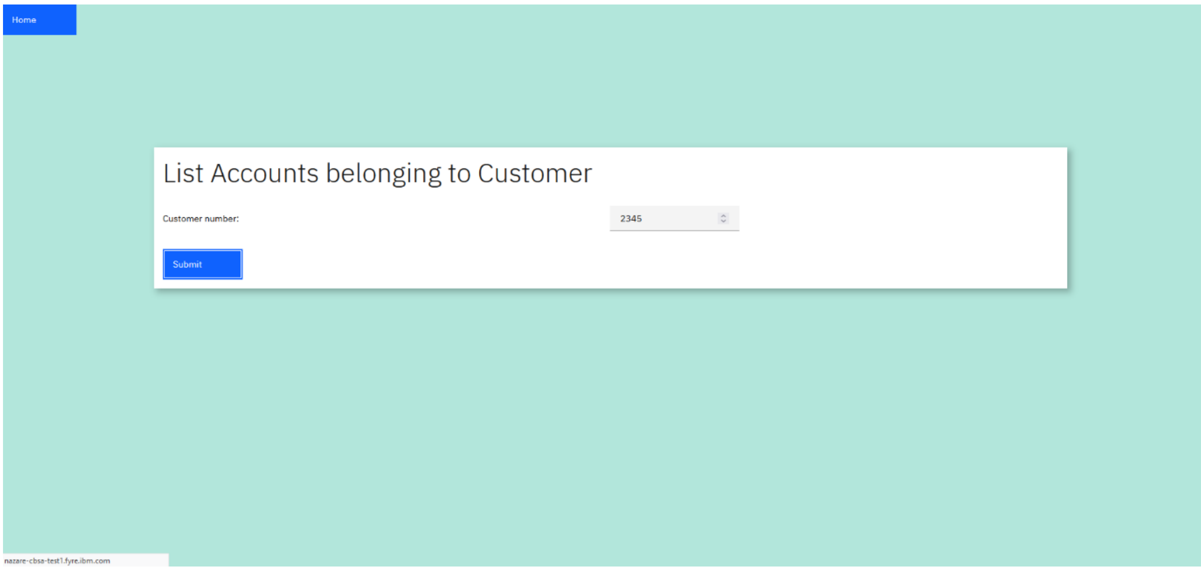
Clicking "Home" returns back to the landing page.

List Accounts belonging to a Customer:

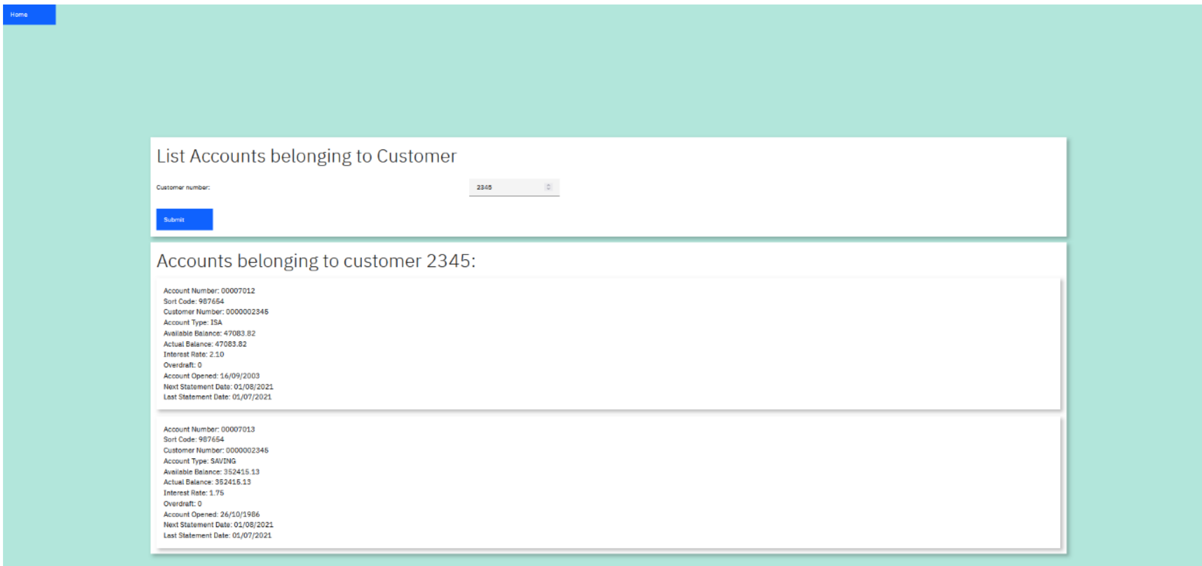
To display the accounts for a particular customer, click on "List accounts belonging to customer":



Supply a Customer number:



And click “Submit”:

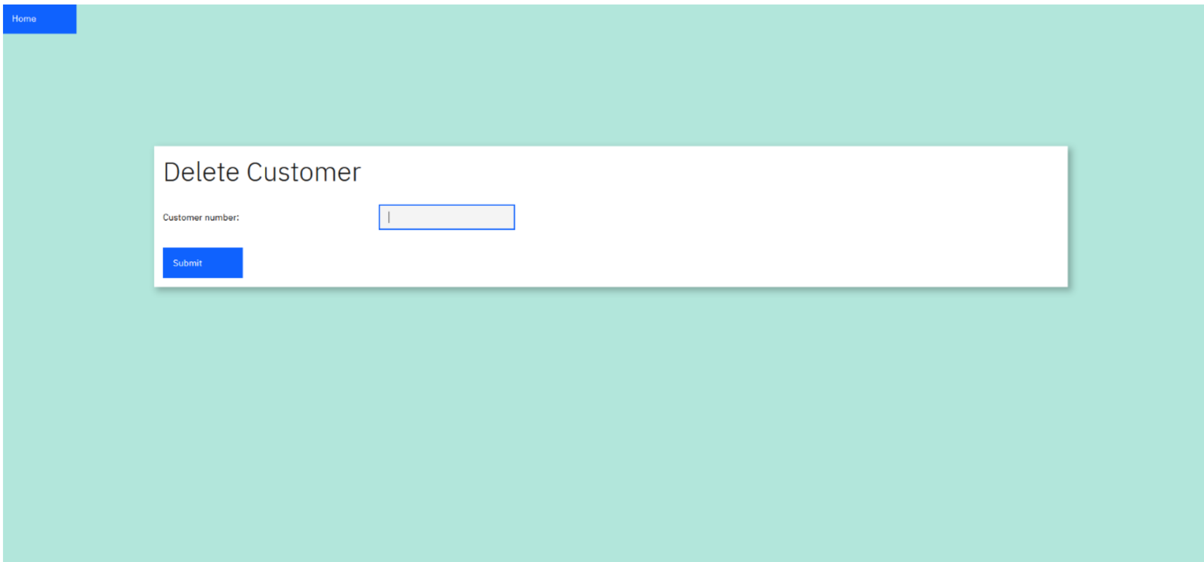


And the associated accounts will be returned. In this example, Customer 2345 has two accounts (7012 and 7013) associated with it .

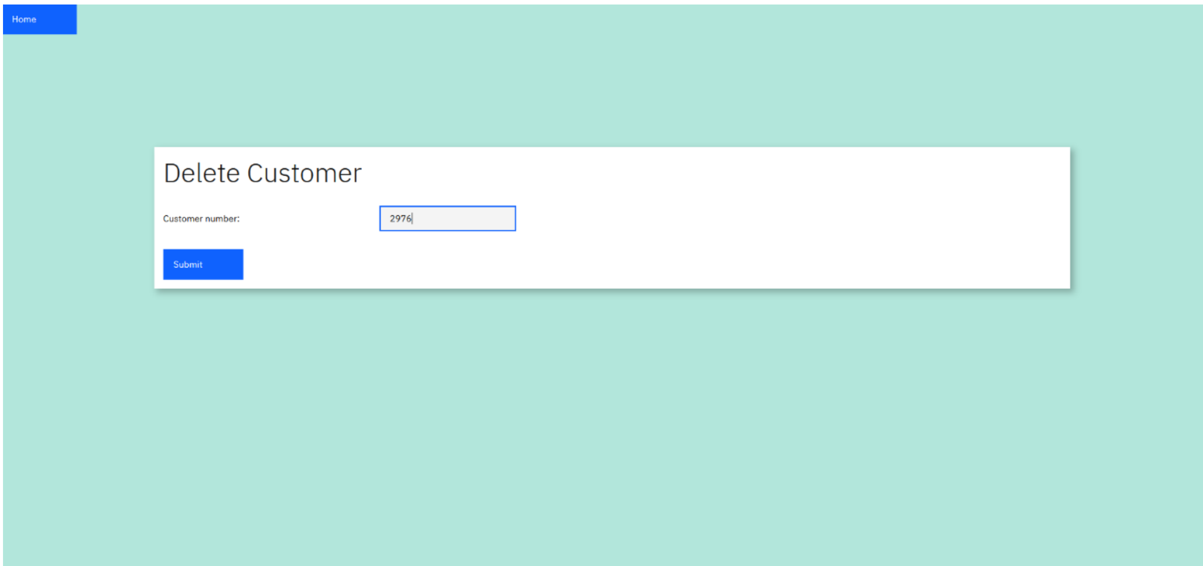
Click “Home” to return to the landing page.

Customer removal/deletion:

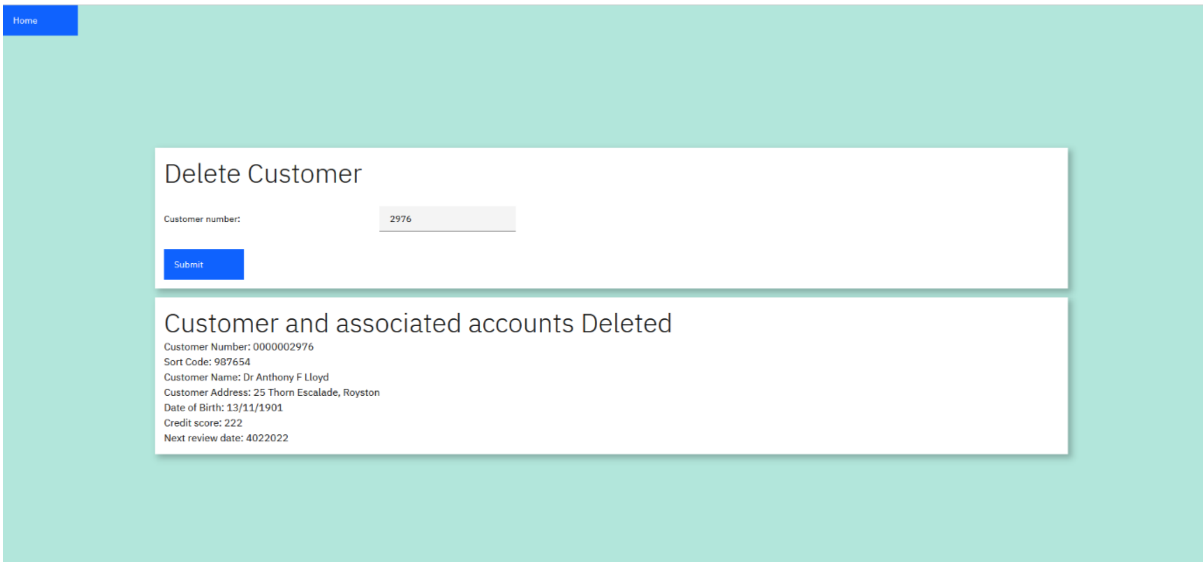
To remove a customer, click on “Delete customer” from the landing page:



Supply the customer number:



And then click “Submit”:

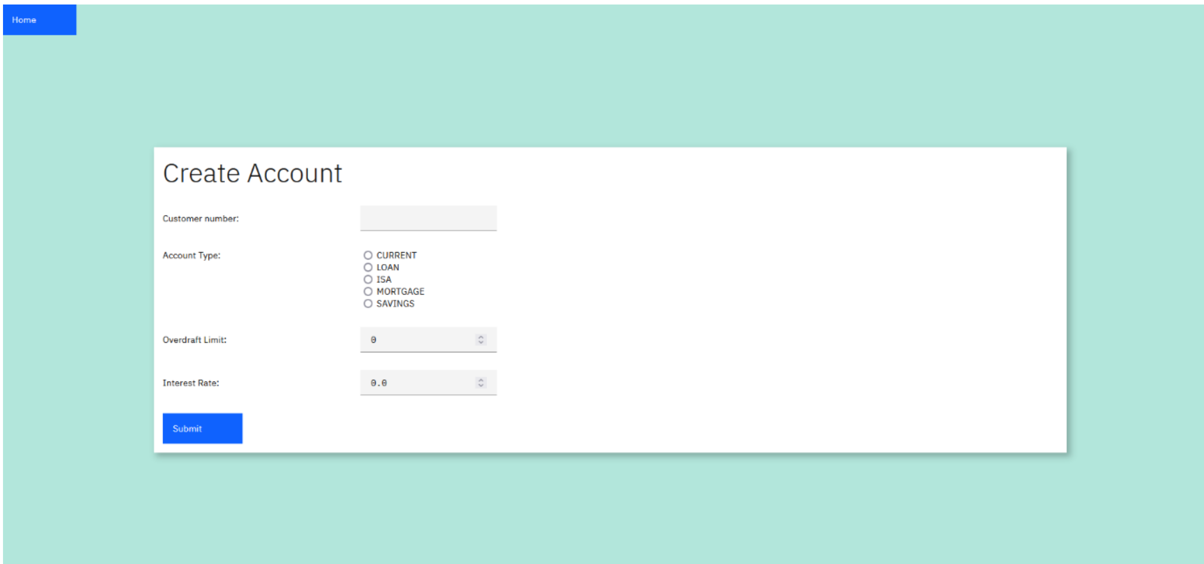


If the request to delete the customer was successful, you should get a confirmation message (shown above). **NOTE** Deleting a customer also removes all associated accounts for that customer.

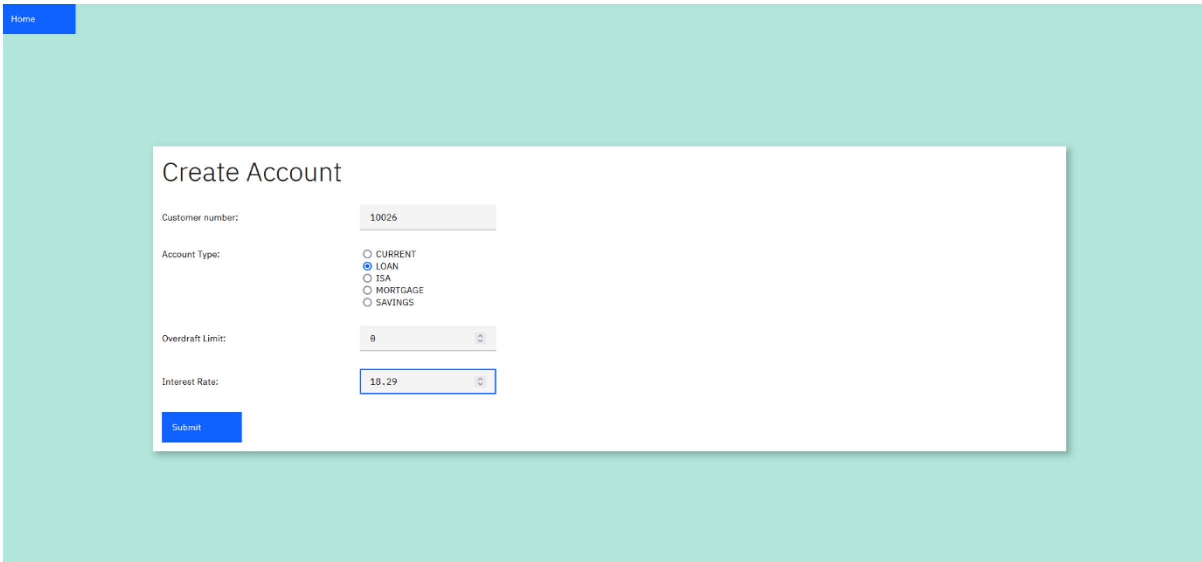
Click “Home” to return to the landing page.

Account creation:

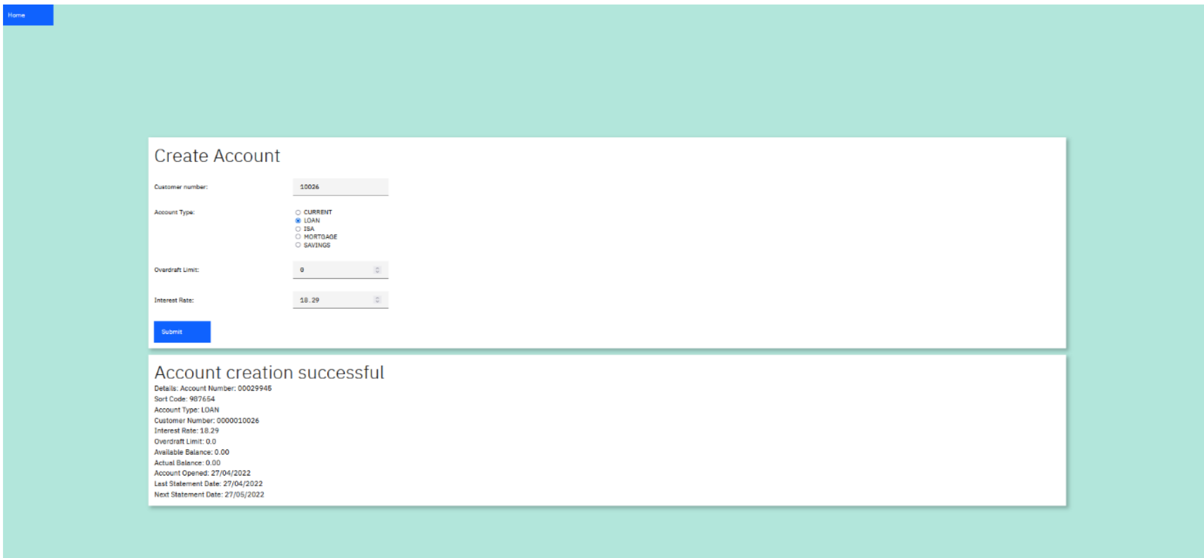
To create a new account for a Customer, click on “Create account”:



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):



Then click Submit:

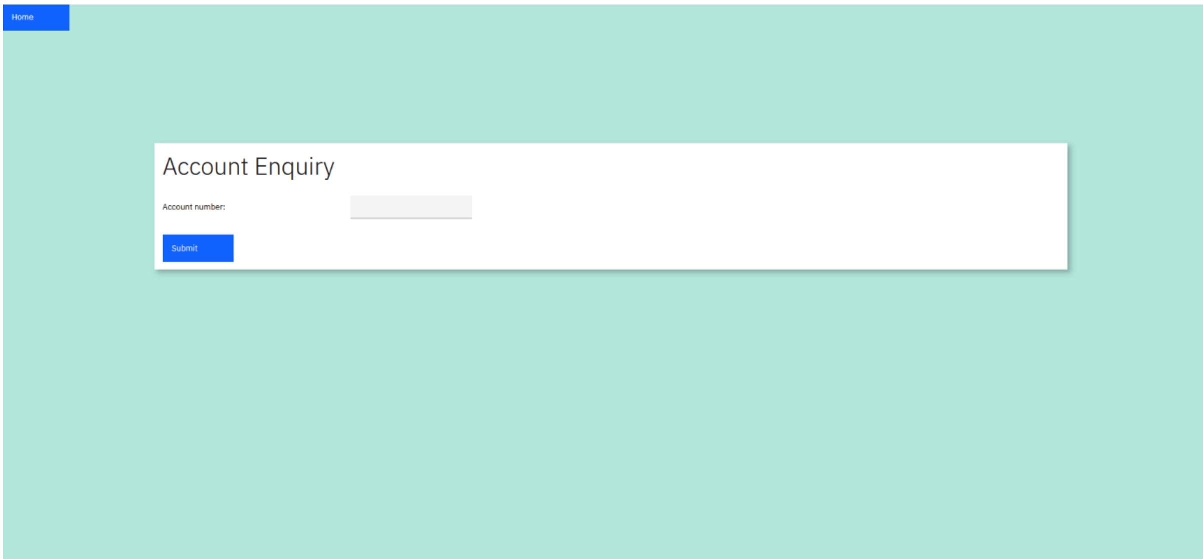


Associated details belonging to the new account get returned upon successful completion (see above).

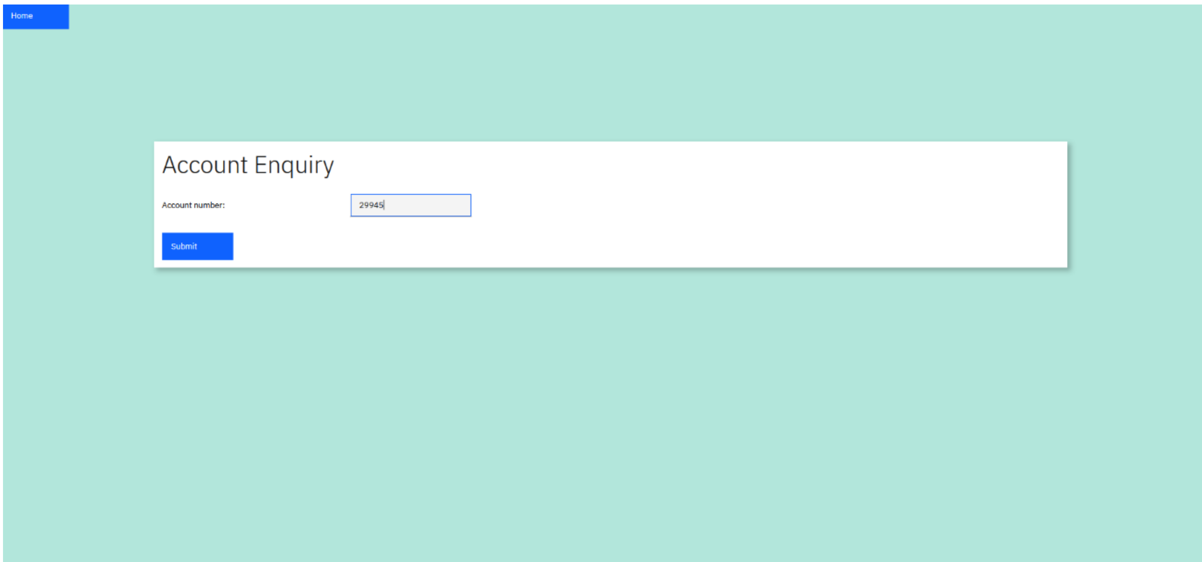
To return to the landing page click ”Home”.

Account enquiries:

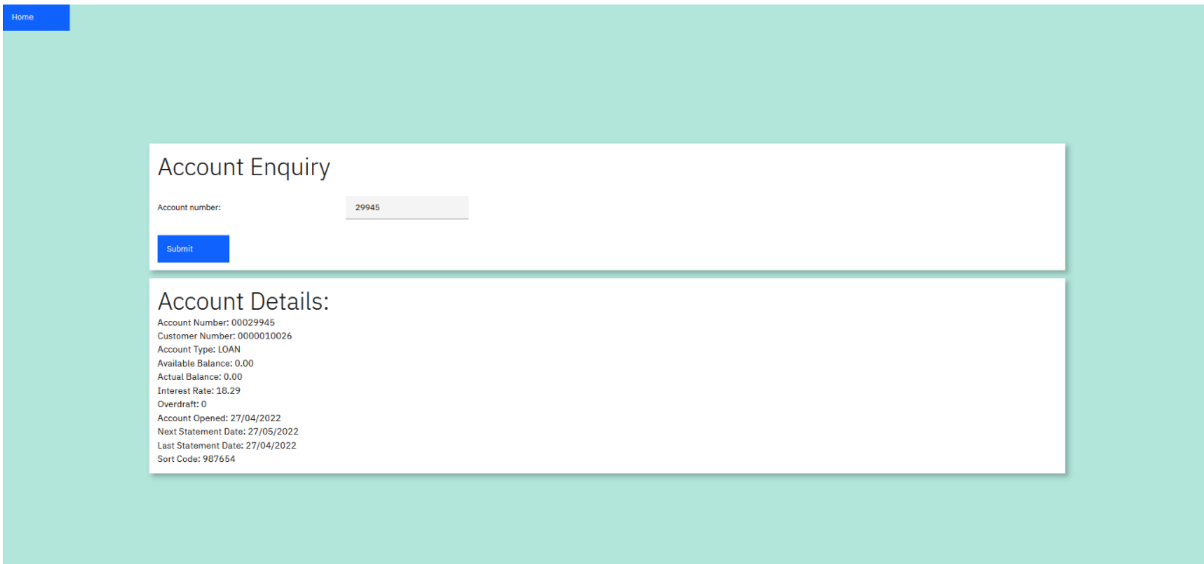
To enquire on an account, click on “View account details” from the landing page:



Supply an account number:



Then click “Submit”:

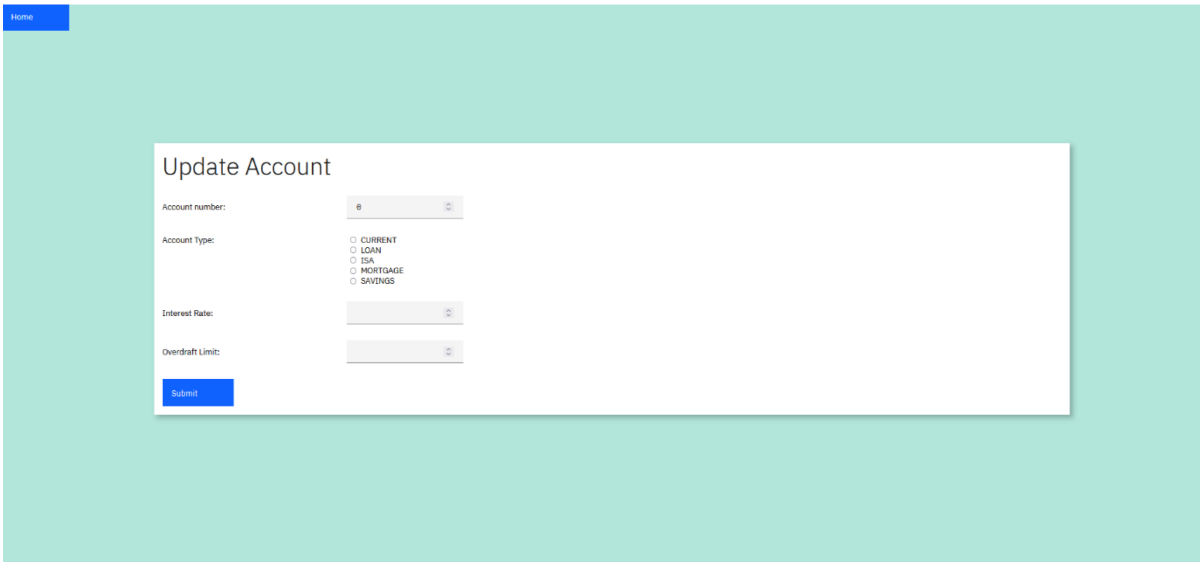


And the account information data is returned (as shown above).

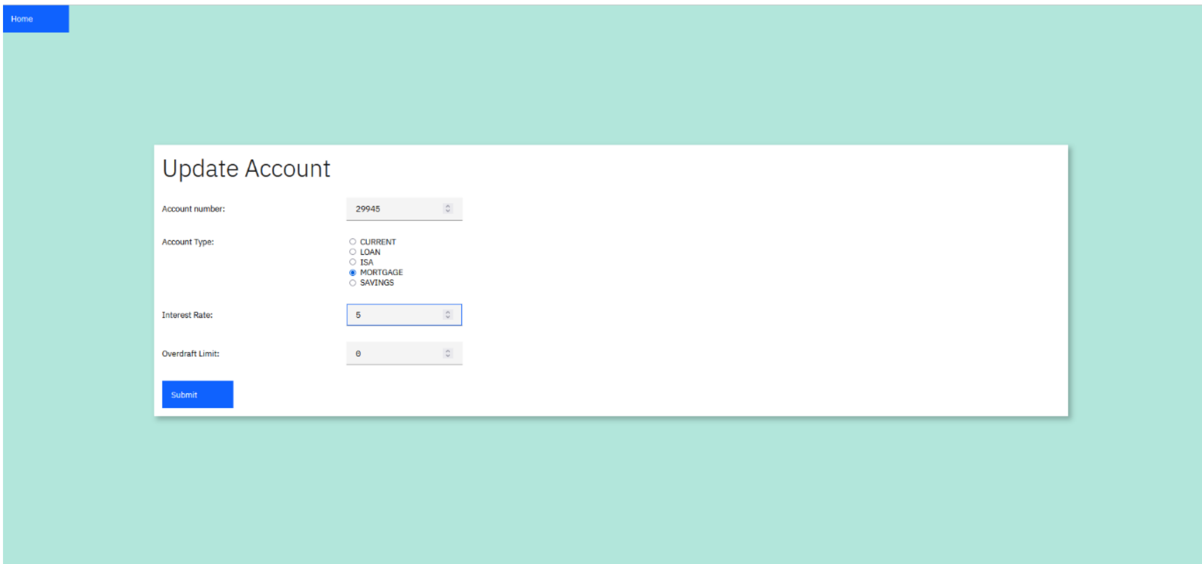
To return to the landing page click “Home”.

Update Account information:

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

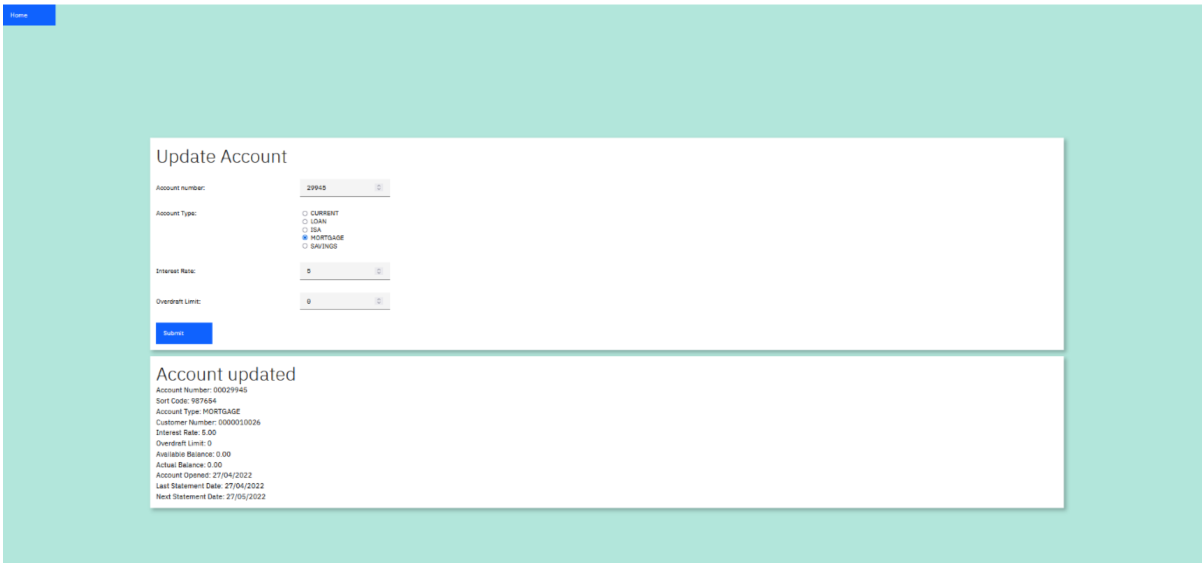


Supply the account number that you wish to update, then you have the option to amend the account type (for example to turn a loan account into a mortgage account), along with updating the interest rate and overdraft limit. You have the choice of changing the account type, interest rate or overdraft limit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



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

Click “Submit”:

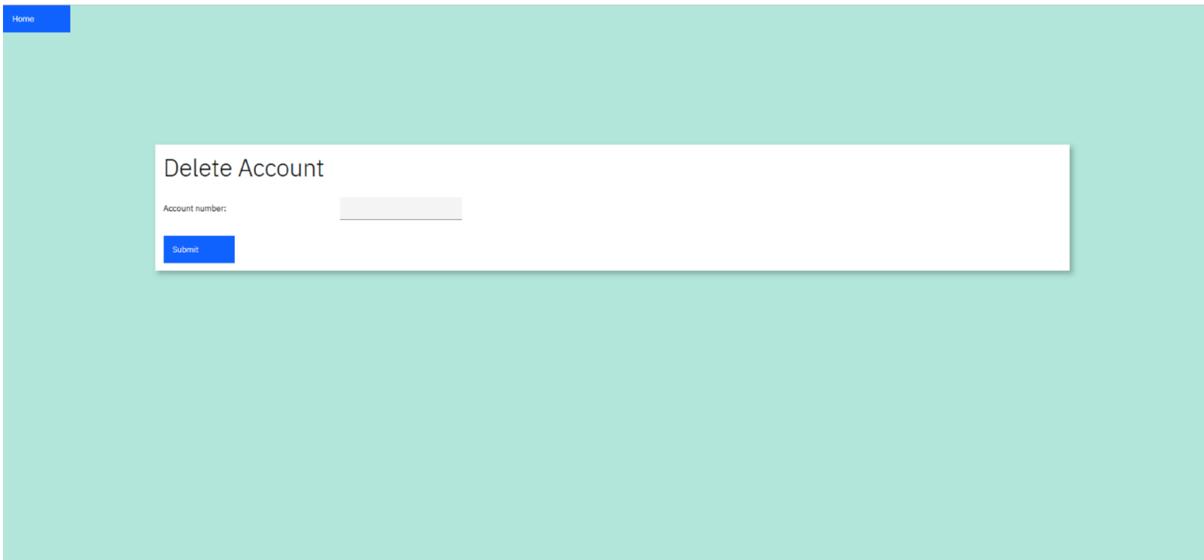


Confirmation of the change is provided upon successful completion.

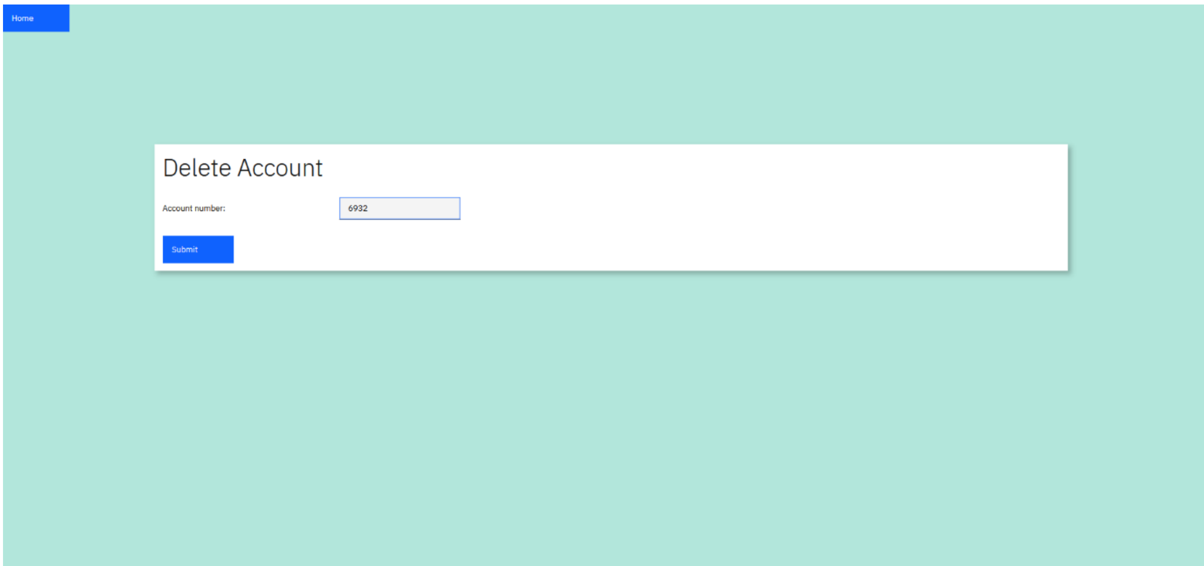
To return to the landing page, click “Home”.

Account Deletion:

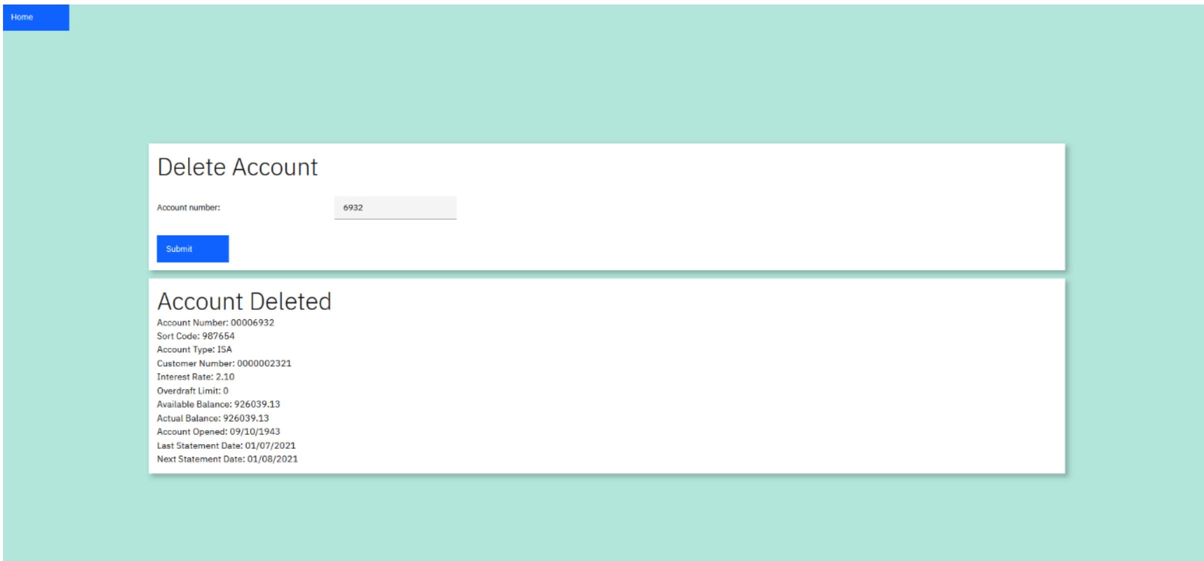
To remove an account click on “Delete account” from the landing page:



Provide an account number:



And click “Submit”:



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

To return to the landing page click “Home”.