

Warning Message

Add

With the member displayed, select one of the following:

- Folders (below suffixes) > Add > Warning Message.
- Select the Warning Message folder > Add.

The Add Warning Message window is used to add a new warning message for a specific suffix or a new warning message for a member.

Type: Select the type from the drop down list. The options are:

- **Member Level message** - This message type is used to place a warning message that applies to the whole member as opposed to a specific suffix. A Member warning message is displayed at the top of the Member Summary window. One member level warning message is allowed per member with two message lines available.
- **Suffix Level message** - This message type is used to place a warning message that only applies to a specific suffix. For suffixes that have a warning message, a red flag is displayed on the folder for the suffix on the Member Summary window. One suffix level warning message is allowed per suffix for each member with two message lines available.

Mandatory		Member level Warning Messages display here. Red = mandatory.					
Snapshot		555555-2 ANNABELLE MEMBER					
Credit Union Over 50 Member Code [200] Alert - Daily Balance ATM Round Up Courtesy Pay Credit Card Debit Card e-Statements	DESCRIPTION 00 Regular Shares 02 Christmas Club 03 Traditional IRA 08 Install/Rev 4.40% 14 Install/Rev 4.95% 51 IRA 68 Heloc 5.80% 81 CD 1.75% (12 Months) 82 CD 3.45% (30 Months)	BALANCE \$13,595.65 \$1,255.00 \$16,856.50 \$0.00 \$11,553.24 \$0.00 \$3,212.76 \$12,000.00 \$6,210.29	AVAILABLE \$13,580.65 \$1,255.00 \$16,856.50 - - \$0.00 \$6,787.24 \$12,000.00 \$6,210.29	DELINQ... - - - \$0.00 - \$0.00 - -	LINE OF CR... - - - - - Expired - -	LIMIT - - - - - \$6,787.24 - -	OWNERS Joint Owner Individual Individual Joint Owner Joint Owner Individual Joint Owner Individual

Suffix: If Suffix Level is chosen as the type of warning message, select the suffix from the drop down list to which the warning message will be applied.

Severity: Select the severity option for the warning message. The options are:

- Mandatory Message** - These are used to display critical information and require an override for any transactions to be posted to or from the member’s suffixes. The Member Warning Message box on the Member Summary window will be red.
- Informational Message** - These are used to display pertinent information and do not require a supervisor override for transactions. The Member Warning Message box on the Member Summary window will be yellow. **Exception:** The box will be red, if the member’s suffix(es) is in “Collections”. This is for credit unions that use the Collections optional software.

Expires On: Use the calendar icon to select an expiration date or enter an expiration date for the warning message, if desired. A blank expiration date means that the warning message will remain on the system indefinitely.

Warning Message: Type in the Warning Message in the spaces provided. There are two message lines available with 70 positions each for the warning message. The system will give a message of **Exceeds maximum warning message length** after the Save button is selected, if the space limit has been exceeded.

Select the Save button, to add the warning message.

The Warning Message icon now displays on the Member Summary window. Changes can be made to warning messages on the system by selecting the specific warning message. A box will display to enter the changes.



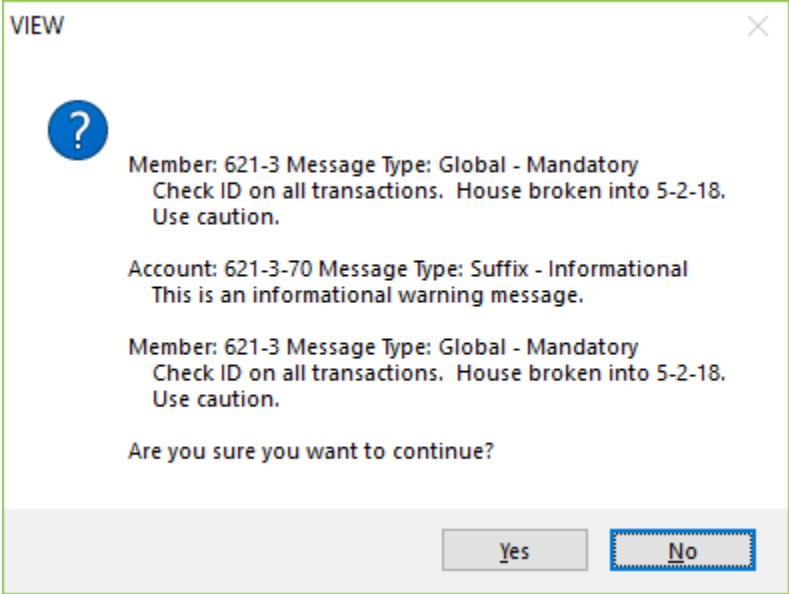
Note

The system will allow the credit union to add a Warning Message when there is a Name and Address record on the system for a member but the 00 suffix has been purged. Only a member level Warning Message will be allowed since there are no suffixes.

Examples:

Example of windows displayed when transactions are processed on a member or suffix that has a warning message.

First, the warning message(s) is displayed.



If the message is Mandatory, after selecting yes the Override Required box is displayed.

The screenshot shows a window titled "Datamatic VIEW" with a red header bar that says "Override Required". Below the header, the following information is displayed:

- Account:** 621-3-70 (NICKY ANGELA NEWMAN)
- Transaction:** Withdrawal-Cash (\$1,000.00)

A scrollable text area contains the following messages:

- Reason(s)
- Restricted/Employee Account
- Member Warning Message (Mandatory)**
- Check ID on all transactions. House broken into 5-2-18.
- Use caution.
- Suffix Level Warning Message (Informational)**
- This is an informational warning message.

Below the scrollable area are two input fields:

- Teller Number:
- Password:

An "Override" button is located in the bottom right corner of the window.

Example of NSF in account balance warning message.

Datamatic VIEW

Override Required

Account: 66334-4-70 (CINDY LOU JONES)
Transaction: Withdrawal-Cash (\$2,000.00)

Reason(s)
NSF in account balance
Member Warning Message (Mandatory)
Check ID on all transactions. mph 2-3-2018.

Teller Number:

Password:

Enter teller number and password to override the messages, if desired. Otherwise, select Cancel.

Audit Warning Messages

Make one of the following selections:

- [Main Ribbon or Member Ribbon > Inquiry > Audit > Warning Message].
- Alt + I > Audit > Warning Message.

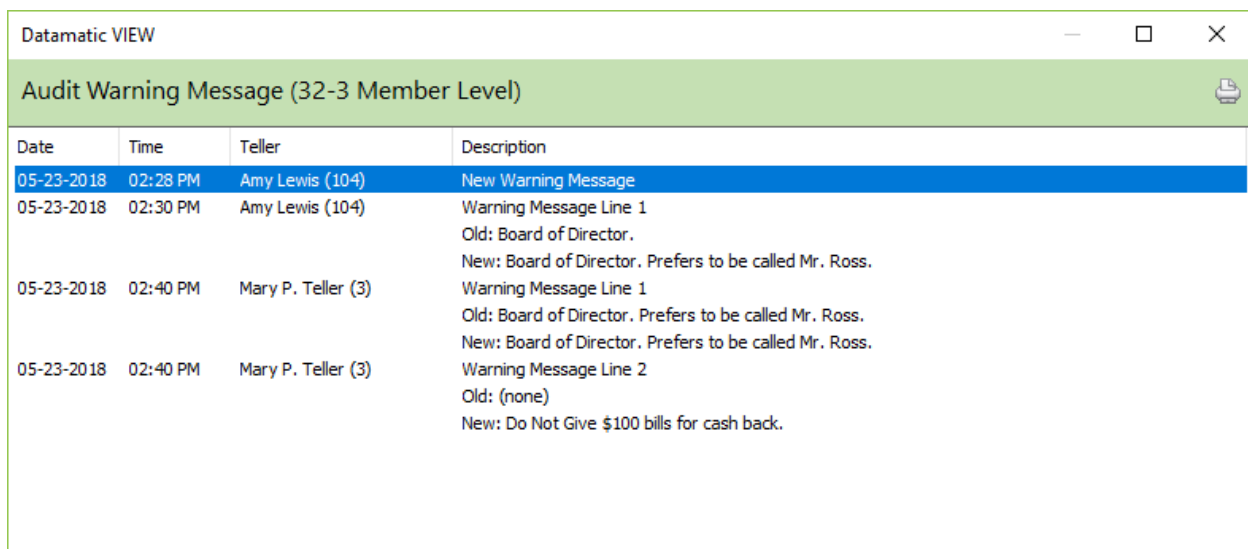
The Audit - Warning Messages option is used to display the file maintenance done on warning messages.

Enter a valid account number and a Type of either Member Message or Suffix Message then press enter or click on Go. If the account number is not known, click on the magnifying glass to the right of the Account field to search for the account number.

Global Message - This message type is used to display a warning message that applies to the member as opposed to a specific suffix.

Suffix Message - This message type is used to display a warning message that applies to a specific suffix.

The system displays.



Date	Time	Teller	Description
05-23-2018	02:28 PM	Amy Lewis (104)	New Warning Message
05-23-2018	02:30 PM	Amy Lewis (104)	Warning Message Line 1 Old: Board of Director. New: Board of Director. Prefers to be called Mr. Ross.
05-23-2018	02:40 PM	Mary P. Teller (3)	Warning Message Line 1 Old: Board of Director. Prefers to be called Mr. Ross. New: Board of Director. Prefers to be called Mr. Ross.
05-23-2018	02:40 PM	Mary P. Teller (3)	Warning Message Line 2 Old: (none) New: Do Not Give \$100 bills for cash back.

In any case, only one message line (old or new) will be displayed or printed. New warning messages will not display either old or new values.

Use the scroll bar at the bottom of the window to move the window to the right to see more information, if necessary. The columns may be shortened or lengthened by moving the mouse pointer to one of the lines between the column headers. When the mouse pointer turns into a **vertical line with two arrows on either side**, hold the left click button down and move the column to the width desired.

The movement of the column widths is temporary and will change back to the original width upon exiting the window.

The purging of file maintenance is done with year end processing. After the file maintenance is purged from the system, the information will no longer be displayed on the audit inquiry windows. **Examples:** On 12-31-13, file maintenance history before 1-1-13, which includes audit information, was purged from the system. On 12-31-12, file maintenance history before 1-1-12 was purged from the system.

Display

From the Member Summary window, select Warning Message. This selection will only display, if a Warning Message has been entered for this member.

Warning Messages						
↑ Up One Level + Add ✖ Remove						
DESCRIPTION	TYPE	CHANGED	SEVERITY	MESSAGE LINE 1	MESSAGE LINE 2	EXPIRATION
Member	Member Level	05-23-2018 by #003	Informational	DBA papers on file at Branch ...	A/K/A Skip Johnson.	-
67 Heloc 7.3	Suffix Level	-	Informational	Legacy Variable Rate Loan for ...		-
70 Draft Suffix	Suffix Level	05-23-2018 by #003	Informational	Order business size checks w...		-

The Warning Messages for this member are displayed. The system will purge expired warning messages automatically one day after the expiration date.

This window can also be used to set up a new warning message. Select Add to open the Add Warning Message window.

The Changed column will allow the staff to quickly view the date and teller number of the person who added or last changed the warning message. The system will automatically fill in today's date and teller number of the employee adding a new or changing an existing warning message. If more details are needed on what was changed, go to [\[Main Ribbon or Member Ribbon > Inquiries > Audit > Warning Messages\]](#).

If none shows in the Changed column that means that the warning message was added prior to the Changed column being added.

Edit and Delete

To make changes to a warning message, select the specific message. The Edit Warning Message box is displayed.

To delete a warning message from an account, highlight the warning message to be deleted and press the delete key. A confirmation box will be displayed. To proceed with deleting the warning message, select yes. Otherwise, select no.

Edit Warning Message

The screenshot shows a window titled "Datamatic VIEW" with a subtitle "Edit Warning Message". The window contains the following fields:

- Type:** Suffix Level
- Account:** 333345-7-74
- Severity:** Informational
- Expires On:** (empty field)
- Message:** Pledge for loan 06 mh

A "Save" button is located at the bottom right of the window.

Select the Save button, after making any needed changes.

The system will give a message of **Exceeds maximum warning message length**, if the space limit has been exceeded. The system will highlight the text that exceeds the maximum length so that changes can be made.

The Date and Teller of the last change do not show on the Edit Warning Message window. This information only shows in the list.

Severity: This determines how important the message is concerning teller transactions. A Mandatory warning message requires a supervisor override for teller transactions. The options for this field are:

- Informational - The Member Warning Message box on the Member Summary displays in yellow. **Exception:** The box will be red, if a member's suffix(es) is in Collections.
- Mandatory - The Member Warning Message box on the Member Summary displays in red.

A blank expiration date indicates that the warning message will remain on the system indefinitely.

Closed Member

A message will be displayed in the Snapshot area of the Member Summary stating **No Open Suffixes**, if all suffixes for the member are closed.

DESCRIPTION	BALANCE	AVAILABLE	DELINQ...
00 Regular Shares	\$0.00	-\$15.00	-
02 Christmas Club	\$0.00	\$0.00	-
03 Traditional IRA	\$0.00	\$0.00	-
45 Secondary Shares	\$0.00	\$0.00	-
70 Draft Suffix	\$0.00	\$0.00	-
82 CD 2.25% (15 Months)	\$0.00	\$0.00	-
83 CD 2.25% (9 Months)	\$0.00	\$0.00	-
85 CD 2.25% (18 Months)	\$0.00	\$0.00	-
86 CD 2.25% (9 Months)	\$0.00	\$0.00	-

To search for closed members still on the system (by name or account number), use the Look in **Member (include Closed)** search option, rather than **Member** only.

New Member Message

A message of *** New Member since xx-xx-xxxx *** will be displayed in the Comment area to the right of the Member Information folder for 180 days following the Date Joined date.

DESCRIPTION	COMMENT
Member Information	* New Member since 04-23-2018 *
Names	
Pending Loans	
Statements	
Warning Messages	