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CRM Implementation

VUE IP Changes – Phase I

July 3, 2012

## Document History

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| **Version** | **Date** | **Author** | **Description** |
| 1.0 | 07/07/2010 | Manmath | Initial Document Creation |
|  | 07/14/2010  07/19/2010 | Vinay  Vinay | Updated Section 1.1 with requirements about general requirements filters and sort by. Updated LOE to 35 hours from 20 hours  Added section 1.2: Block the new Channel of Affiliates/Brokers from coming over to CRM |
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## Approvals

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| **Date** | **Name** | **Title** | **Signature** |
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# Show commission records in IFrame

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| **Feature** | Remove Commission entity from CRM and show commission records in IFrame | | |
| **CSSI ID** |  | **Iteration** |  |
| **Priority** |  | **Est. Effort** | 20 |
| **Dependencies** |  | | |
| **Requirement** | * Remove commissions entity from CRM * VUE IP Process should not push commissions records through CRM * Remove existing Commissions grid * Replace Commissions grid with an IFrame that reads data from VUE database and show Commission records * Web Service needs to be created in VUE application that would return commission data for a given policy | | |
| **Assumptions** | * + It will be grid view display and user will not be able to open a specific commission record in separate window as popup. | | |
| **Testing Scenario** |  | | |
| **Security Roles** |  | | |
| **Questions** |  | | |

# Show Underwriting records in IFrame

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| **Feature** | Remove Underwriting Requirements entity from CRM and show UW records in IFrame | | |
| **CSSI ID** |  | **Iteration** |  |
| **Priority** |  | **Est. Effort** | 35 |
| **Dependencies** |  | | |
| **Requirement** | * Remove Underwriting Requirement entity from CRM * VUE IP Process should not push Underwriting Requirement records through CRM * Add a tab “Underwriting Requirements” on Policy entity * Add an IFrame on “Underwriting Requirements” tab that reads Underwriting Requirements data * Web Service needs to be created in VUE application that would return UW data for a given policy * General Requirements   + Make the outstanding requirements stand out from the others.     - Suggestion: Either bold or change the font color for the Activity Status of "Outstanding".   + Expand Activity Description column   + Wrap the text in the Activity Description column so that all comments for the UW Notes are visible.   + Remove Created On column   + Add column for Requested Date     - Column should be placed before Date Received column. * Allow user to filter on:   + Activity Status:     - All (default)     - Outstanding (where Activity Status = Null and ??? - This includes UW Requirements and UW Notes, as UW Notes do not have an Activity Status.) * Sort by:   + Outstanding   + Created On (descending order so most recently created is at the top) | | |
| **Assumptions** | * + It will be grid view display and user will not be able to open a specific Underwriting record in separate window as popup.   + Grid view columns will be same as we have in PRODUCTION. | | |
| **Testing Scenario** |  | | |
| **Security Roles** |  | | |
| **Questions** |  | | |

# Block the new Channel of Affiliates/Brokers from coming over to CRM

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| --- | --- | --- | --- |
| **Feature** | Block the new channel of Affiliates/Brokers from coming over to CRM based on the security role and channel | | |
| **CSSI ID** |  | **Iteration** |  |
| **Priority** |  | **Est. Effort** | 8 |
| **Dependencies** |  | | |
| **Requirement** | * Need to identify the channel to be blocked by using the Agent id based on the following criterion:   + VUEIP has Agent-Policy relationship information   + VUE has Agent-Channel information * Once the channel is identified, make sure the VUEIP process does not push this information to CRM, | | |
| **Assumptions** |  | | |
| **Testing Scenario** | * Validate that input data for a specific security role and channel does not reflect in CRM. | | |
| **Security Roles** |  | | |
| **Questions** | * What happens when an agent works for more than one channel? | | |