| PIM-001 | Import Placements | This is successful placement. | 1. Logged into CPX 2. EDI Template is loaded. 3. EDI Fields are loaded. 4. EDI Condition Groups are loaded. 5. RegTest-Placement Mapping is loaded. | 1. Navigate to EDI > Placement Imports screen 2. Click arrow next to RegTest-Placements 3. Drop RegTest-Placement.0ND into the box where it says ‘drag files here’ 4. Click Submit |  | 1. Upload Results screen should show with a preview table of the data. 2. Success Notification:   “File processed successfully. A total of 1 records were processed. There were 1 different record types found” |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| EAP-001 | EDI Allocation For Placements | This is successful placement. | 1. RegTest-Placement.0ND completed successfully | 1. Navigate to EDI > EDI Allocation For Placements 2. Dropdown arrow Automatic Collections Workby and choose CPX 3. Dropdown arrow Runtime Workby Assignments and choose CPX 4. Click Allocate |  | 1. A list of records will appear. |  |  |  |
| PND-001 | Pending Placements | This is successful placement. | 1. Import Placements completed successfully 2. EDI Allocation For Placements completed | 1. Navigate to EDI > Pending Placements 2. If Import Placements were completed successfully, move to step Load Placements 3. If Import Placements were not completed successfully, click Delete Pending Placements and note this step as Fail |  | 1. A list of records will appear. 2. No error message received. |  |  |  |
| LPL-001 | Load Pending Placements | This is successful placement. | 1. Import RegTest-Placements completed successfully 2. EDI Allocation For Placements completed 3. Pending Placements completed | 1. Navigate to EDI > Load Pending Placements 2. Change ‘Placement Date’ to today’s date 3. Move ‘Process Invalid Forwarders’ toggle to the right. 4. Click ‘Submit Preliminary Placement Batch’   Submit Final Placement Balance |  | 1. Success Notification:   “File processed successfully. A total of 1 records were processed. There were 1 different record types found” |  |  |  |
| PIM-002 | Import Placements | This is an unsuccessful placement. | 1. Logged into CPX 2. EDI Template is loaded. 3. EDI Fields are loaded. 4. EDI Condition Groups are loaded. 5. RegTest- Placement Mapping is loaded. | 1. Navigate to EDI > Placement Imports screen 2. Click arrow next to Capital One Placements 3. Drop RegTest-Placement-2.0ND into the box where it says ‘drag files here’   Click Submit |  | 1. Success Notification:   “File processed successfully. A total of 1 records were processed. There were 1 different record types found” |  |  |  |
| EAP-002 | EDI Allocation For Placements | This is an unsuccessful placement. | 1. RegTest-Placement-2.0ND completed successfully | 1. Navigate to EDI > EDI Allocation For Placements 2. Dropdown arrow Automatic Collections Workby and choose CPX 3. Dropdown arrow Runtime Workby Assignments and choose CPX 4. Click Allocate |  | 1. A list of records will appear. 2. No error message received. |  |  |  |
| PND-002 | Pending Placements | This is an unsuccessful placement. | 1. Import RegTest-Placements-2.OND completed successfully 2. EDI Allocation For Placements completed | 1. Navigate to EDI > Pending Placements 2. If Import Placements were completed successfully, move to step Load Placements |  | 1. A list of records will appear. 2. No error message received. |  |  |  |
| LPL-002 | Load Pending Placements | This is an unsuccessful placement. | 1. Import RegTest-Placements-2.OND completed successfully 2. EDI Allocation For Placements completed 3. Pending Placements completed | 1. Navigate to EDI > Load Pending Placements 2. Change ‘Placement Date’ to today’s date 3. Move ‘Process Invalid Forwarders’ toggle to the right. 4. Click ‘Submit Preliminary Placement Batch’ 5. Click X to remove Error Message. |  | 1. Error Notification:   “We've encountered an error!  The given placement range is unable to load. Please run EDI Allocation and correct any issues.” |  |  |  |
| PND-003 | Remove Placement Accounts | This is an unsuccessful placement. | 1. Import RegTest-Placements-2.OND completed successfully 2. EDI Allocation For Placements completed 3. Pending Placements completed 4. Loading Pending Placements produced an Error | 1. Navigate to EDI > Pending Placements 2. Click ‘Delete Pending Placements’ 3. Click ‘Delete Pending Placements’ |  | 1. Success Notification: “Pending placements deleted successfully” |  |  |  |