

# US CONV Auto - Move Policy from one customer account to another

## Overview

Name:	US CONV Auto - Move Policy from one customer account to another
Type:	System Requirement
Format:	Text
Project:	Property PAS (Requirements)
Created on:	2015-07-06T21:25:13.678+0000
Creator:	Santhalal, SwarnaKumari
Last modified:	2015-07-29T16:43:56.315+0000
Artifact Revision URL:	US CONV Auto - Move Policy from one customer account to another Revision _APY-sTYREeWrVePpzyoZYg

## Attributes

Name	Value
Identifier	21331
Author	Gopalakrishnan, Venkat K
Product	CEA
US Status	Completed

## Artifact Content

**User Story ID:** 21331

**User Story Title:** US CONV Auto - Move Policy from one customer account to another

**User Story Description:** As a user, I should be should be able to move a policy from one customer account to another customer account.

### General Assumptions:

- Exigen error handling functionality is invoked. Errors that are thrown due to data type constraints, i.e., *money*, *numeric*, *date* are included in Exigen error handling. Error messages for data type errors cannot be configured.
- The Data Dictionary is the definitive source for data requirements and UI labels.
- Wireframes are the definitive source for UI components and layout.

### User Story Assumptions:

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Technical artifacts (contracts, design document) will be attached to the RTC work item.

### Supporting Info:

Product	CL - Auto
Actor / Role	System
Preceding User Story	N/A
Includes User Story	N/A
Extends User Story	N/A
Related User Story	N/A

**Acceptance Criteria:**

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
1	Move Policy from one customer account to another account - Conversion policy	<b>Pre-Condition:</b> Legacy Auto policy data is extracted and imported into PAS and renewal quote is available under PAS customer account.	<p>1. Agent navigates to renewal quote consolidated page and clicks on 'Move Policy' option in the 'Move To' drop down.</p> <p>2. System opens the Exigen customer account search page.</p> <p>3. Agent enters the search criteria and clicks on search. System lists all the matching customer accounts with customer account number as links.</p> <p>4. Agent clicks on a matching customer account from the list and system opens the selected customer account with the following data</p> <ul style="list-style-type: none"> <li>• Customer name</li> <li>• Customer address</li> <li>• Customer #</li> <li>• Date Of Birth</li> <li>• Customer Phone #</li> </ul> <p>5. Agent clicks on 'Move to this account' button.</p> <p>5a. System opens up a pop</p>	Policy and billing account is moved from one customer account to another customer account.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
			<p>up with the message &lt;IN-0788&gt; <b>only</b> if the customer account doesn't have any other quote or policy listed under it. Agent clicks 'Yes'.</p> <p>(If agent clicks 'No', system should go back to the policy consolidated page and shouldn't perform step # 6 and #7)</p> <p>6. System moves the policy (including all the terms, versions and out of sequence or pending endorsements) and billing account to the new customer account chosen.</p> <p>7. System deletes the previous customer account.</p>	

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
2	Move Policy from one customer account to another account - Non-Conversion policy	<b>Pre-Condition:</b> Auto policy is available under PAS customer account.	<p>1. Agent navigates to policy consolidated page and clicks on 'Move Policy' option in the 'Move To' drop down.</p> <p>2. System opens the Exigen customer account search page.</p> <p>3. Agent enters the search criteria and clicks on search. System lists all the matching customer accounts with customer account number as links.</p> <p>4. Agent clicks on a matching customer account from the list and system opens the selected customer account with the following data</p> <ul style="list-style-type: none"> <li>• Customer name</li> <li>• Customer address</li> <li>• Customer #</li> <li>• Date Of Birth</li> <li>• Customer Phone #</li> </ul> <p>5. Agent clicks on 'Move to this account' button.</p> <p>5a. System opens up a pop</p>	Policy and billing account is moved from one customer account to another customer account.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
			<p>up with the message &lt;IN-0788&gt; <b>only</b> if the customer account doesn't have any other quote or policy listed under it. Agent clicks 'Yes'.</p> <p>(If agent clicks 'No', system should go back to the policy consolidated page and shouldn't perform step # 6 and #7)</p> <p>6. System moves the policy (including all the terms, versions and out of sequence or pending endorsements) and billing account to the new customer account chosen.</p> <p>7. System deletes the previous customer account.</p>	

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
3	Cancel Customer selected	<b>Pre-Condition:</b> Auto policy or conversion renewal quote is available under PAS customer account.	<p>1. Agent navigates to renewal quote or policy consolidated page and clicks on 'Move Policy' option in the 'Move To' drop down.</p> <p>2. System opens the Exigen customer account search page.</p> <p>3. Agent enters the search criteria and clicks on search. System lists all the matching customer accounts with customer account number as links.</p> <p>4. Agent clicks on a matching customer account from the list and system opens the selected customer account with the following data</p> <ul style="list-style-type: none"> <li>• Customer name</li> <li>• Customer address</li> <li>• Customer #</li> <li>• Date Of Birth</li> <li>• Customer Phone #</li> </ul> <p>5. Agent clicks on 'Cancel' button and system goes</p>	Customer chosen is cancelled and system goes back to the Customer search page displaying search results.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
			back to the customer search page displaying the search results.	
4	Search criteria not entered	<b>Pre-Condition:</b> Auto policy or conversion renewal quote is available under PAS customer account.	1. Agent navigates to renewal quote or policy consolidated page and clicks on 'Move Policy' option in the 'Move To' drop down. 2. System opens the Exigen customer account search page. 3. Agent doesn't enter any search criteria and clicks on search. 4. System throws message <ER-0789>	System throws error message when no search criteria is entered and search is performed.



No	AC Title	Context or Precondition	Event	Outcome or Post Condition
5	No results found	<b>Pre-Condition:</b> Auto policy or conversion renewal quote is available under PAS customer account.	1. Agent navigates to renewal quote or policy consolidated page and clicks on 'Move Policy' option in the 'Move To' drop down. 2. System opens the Exigen customer account search page. 3. Agent enters the search criteria and clicks on search. System couldn't find matching customer account in the PAS system. 4. System throws message <ER-0790>	System throws error message when no matching customer account is found.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
6	Clear search	<b>Pre-Condition:</b> Auto policy or conversion renewal quote is available under PAS customer account.	<ol style="list-style-type: none"> <li>1. Agent navigates to renewal quote or policy consolidated page and clicks on 'Move Policy' option in the 'Move To' drop down.</li> <li>2. System opens the Exigen customer account search page.</li> <li>3. Agent enters the search criteria (or) agent enters search criteria and clicks on search and search results are displayed.</li> <li>4. Agent clicks on clear button.</li> <li>5. System clears all the search criteria and search results.</li> </ol>	System clears the search criteria and search results when clear button is clicked.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
7	Cancel search	<b>Pre-Condition:</b> Auto policy or conversion renewal quote is available under PAS customer account.	1. Agent navigates to renewal quote or policy consolidated page and clicks on 'Move Policy' option in the 'Move To' drop down. 2. System opens the Exigen customer account search page. 3. Agent enters the search criteria (or) agent enters search criteria and clicks on search and search results are displayed. 4. Agent clicks on cancel button. 5. System goes back to the policy consolidated page.	System goes back to the policy consolidated page when cancel button is clicked.

**Data Requirements.** Refer to Data Dictionary for Attribute Details. Represents data that is capture as part of this User Story.

Data Id	Entity	Attribute

**Related Attributes.** Attributes that are referenced, consumed, impacted by this user story.

Data Id	Entity	Attribute

Data Id	Entity	Attribute

*Comments*  
*none*