US CONV Auto - Customer Match

Overview

Name:	US CONV Auto - Customer Match
Type:	System Requirement
Format:	Text
Project:	Property PAS (Requirements)
Created on:	2015-06-29T17:52:27.987+0000
Creator:	Santhalal, SwarnaKumari
Last modified:	2015-08-27T23:15:57.451+0000
Artifact Revision URL:	US CONV Auto - Customer Match Revision _kqGFsU0REeWlm8i65atn5g

Attributes

Name	Value
Identifier	21189
Author	Gopalakrishnan, Venkat K
Product	CEA
US Status	Completed

Artifact Content

User Story ID: 21189
User Story Title: US CONV Auto - Customer Match
User Story Description: As a System, it should have the ability to match the imported Named Insured information with existing Exigen customer accounts and create conversion policy image in an existing account or new one based on the match result.

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:
1
Technical artifacts (contracts, design document) will be attached to the RTC work item.
2
Creation of multiple versions during data import is out of scope of this user story.
3
When comparing the customer names, ignore the case.

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	When matching customer account not found - DOB is available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name, Last name and DOB of the first Named Insured is available in the extract feed. 2. Customer resident address zip code is available in the extract feed.	1. System searches for customer accounts matching the imported First name, Last name and Date of Birth and no matching customer account is found. 2. System searches for customer accounts matching the imported First name, Last name and Zip code and no matching customer account is found. 3. System creates a new Exigen account and a customer under that account with the following information. System defaults Customer Creation Type as 'Individual'. • First named insured's First name • First named insured's Last name • First named insured's DOB • Residential address - System defaults the Address	New customer account is created and imported policy is attached to the customer account created.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
			Type as 'Residence'. 4. System imports the new policy under the customer account created.	

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
2	When matching customer account not found - DOB is not available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name and Last name of the first Named Insured is available in the extract feed. DOB of the First Named Insured is empty. 2. Customer resident address zip code is also populated.	1. System searches for customer accounts matching the imported First name, Last name and Zip code and no matching customer account is found. 3. System creates a new Exigen account and a customer under that account with the following information. System defaults Customer Creation Type as 'Individual'. • First named insured's First name • First named insured's Last name • Residential address - System defaults the Address Type as 'Residence'. 4. System imports the new policy under the customer account created.	New customer account is created and imported policy is attached to the customer account created.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
3	When only one matching customer account found - DOB is available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name, Last name and DOB of the first Named Insured is available in the extract feed. 2. Customer resident address zip code is also populated.	1. System searches for customer accounts matching the imported First name, Last name and Date of Birth and only one matching customer account is found. 2. System imports the new policy under the matching customer account found.	Policy is imported and attached to existing customer account.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
4	When only one matching customer account found - DOB is available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name, Last name and DOB of the first Named Insured is available in the extract feed. 2. Customer resident address zip code is also populated.	1. System searches for customer accounts matching the imported First name, Last name and Date of Birth and no matching customer account is found. 2. System searches for customer accounts matching the imported First name, Last name and Zip code and only one matching customer account is found. 3. System imports the new policy under the matching customer account found.	Policy is imported and attached to existing customer account.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
5	When only one matching customer account found - DOB is not available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name and Last name of the first Named Insured is available in the extract feed. DOB of the First Named Insured is empty. 2. Customer resident address zip code is also populated.	1. System searches for customer accounts matching the imported First name, Last name and Zip code and only one matching customer account is found. 2. System imports the new policy under the matching customer account found.	Policy is imported and attached to existing customer account.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
6	More than one matching customer account found - DOB is available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name, Last name and DOB of the first Named Insured is available in the extract feed 2. Customer resident address zip code is also populated.	1. System searches for customer accounts matching the imported First name, Last name and Date of Birth and more than one matching customer account is found. 2. System imports the new policy to the latest customer account with active policy. If there is no matching customer account with active policy, then system attaches the new policy to most recently created account in the matching list.	Policy is imported and attached to existing customer account.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
7	More than one matching customer account found - DOB is available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name, Last name and DOB of the first Named Insured is available in the extract feed 2. Customer resident address zip code is also populated.	1. System searches for customer accounts matching the imported First name, Last name and Date of Birth and no matching customer account is found. 2. System searches for customer accounts matching the imported First name, Last name and Zip code and more than one matching customer account is found. 3. System imports the new policy to the latest customer account with active policy. If there is no matching customer account with active policy, then system attaches the new policy to most recently created account in the matching list.	Policy is imported and attached to existing customer account.

No	AC Title	Context or Precondition	Event	Outcome or Post Condition
8	More than one matching customer account found - DOB is not available in the import data	**Pre-Condition:** 1. Auto policy data is extracted from Legacy system as part of Automated conversion or Semi-Automated conversion. First name and Last name of the first Named Insured is populated. DOB of the First Named Insured is empty. 2. Customer resident address zip code is also populated.	1. System searches for customer accounts matching the imported First name, Last name and Zip code and more than one matching customer account is found. 2. System attaches the new policy to the latest customer account with active policy. If there is no matching customer account with active policy, then system attaches to the new policy to latest customer account found.	Policy is imported and attached to existing customer account.

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