**TransCredit - Certificates**

*Коммент* [*Ivan Sokolov*](mailto:i.sokolov@symfa.com) *после встречи 9/24:*

Primary Skill: мне сказали MS Access, но мне показалось, что C# тоже понадобится

Задача: разобраться в текущих хранимых процедурах, VBA и остальном коде Access, чтобы из пригодных текущих частей + нового кода реализовать несколько фичей по сертификатам:

* добавить больше параметров, по которым производится поиск сертификатов через UI
* внедрить логирование событий, которые пользователь делает с сертификатами через UI (добавил сертификат / обновил сертификат и т.д.)

*Оригинальный текст от Аммона:*

PlateauGroup.Web Solution -> PlateauGroup.Web Project

**Certificate Search:**

/Pages/Certificate/CertificateSearch.razor

Need to add:

Search by first and last name (use wildcards)

Search by Birthday

Search by SSN

Search by Claim Number

**Certificate Audit Log:**

* Add new table CertAudit
* Include:
  + Id (identity, auto-increment)
  + CertId
  + ChangedValue (ie CertPlan.PlanCode)
  + RecordId (ie 501)
  + OldValue (ie 211)
  + NewValue (ie 111)
  + Reason (ie Bank sent bad information, corrected)
  + ChangeDate
  + ChangedBy
* Whenever a change is made to an existing certificate, prompt user for reason of change and insert record
* Add a new CertAudit component
* On the CertificateDetails.razor screen, add the CertAudit component (collapsable) to show the certificate's audit logs
* Can only edit certificate in current RYM (CompanyMaster.CurrentRYM)

**Certificate Error Checking:**

* Checks will be determined by review of Access and SQL code
* Incorporate all the checks into the CertificateService.cs in ApsPlateau.Services project
* Once a report is completed and all errors are moved, all certificate records and agent report records in the DMZ-webdata apsPlateau database should be deleted.

CertError table (TODO)

**Agent Communication:**

* Create new AgentReportEmail table
* Include:
  + Id (identity, auto-increment)
  + AgentReportId
  + AgentEmail
  + AddedDate
  + IsInbound (true if inbound, false if outbound)
  + Subject
  + Body
  + ResolvedDate
  + ResolvedBy
* Create new AgentReportEmailAttachment table for attachments
  + Id (identity, auto-increment)
  + AgentReportEmailId
  + FileName
  + FileData
* When there is an issue with an Agent Report that requires clarification from an Agent, our user will need to send out an email to the Agent to resolve the issue
  + When sending out the email, the user needs the ability to attach spreadsheet of certificates
    - Allow user to select specific certificates, all certificates with errors, or all certificates on report
  + Include the AgentReportEmail ID value in both the subject line as well as in the email body for parsing inbound emails
  + Include a link for the Agent to fix the issues on the DMZ website (details below)
* Monitor Inbound Emails - when an agent responds to an email, parse out the AgentReportEmail ID value from either the subject line or the body.
* If the Agent removes the ID from both the subject and the email, search for outbound emails to the same email address in the last week.
* If no matching record in the agentReportEmail table is found, reply back to the agent to reply to the original email, but also forward the email directly to a user in case the Agent doesn't respond correctly.
* Add to the Agent Report page a new tab for Communications
* Show all communications for the report on the new tab, along with the ability to send additional emails

**Public DMZ Website Error Correction:**

* When an Agent needs to make correction to a report, the certificates (along with all supporting table values) and Agent Report should be copied to the DMZ MS SQL Server (when the email is first sent on a report)
* NOTE: Agents have Auth0 MFA credentials to access the DMZ website
* On the website, agents should have access to view all pending reports and the ability to edit certificates
* Once all certificates have been edited and corrected, alert the user by inserting a specific OpsLog message
* In PlateauGroup.Web, the user needs to see the modifications the Agent made to the certificates in DMZ.Web.
  + If the changes are correct, the user will approve them and the apsPlateau tables will be updated with the new values

**Balancing:**

* Users need to be able to balance the Report and Remittance with the values from CertMaster
* Need more information

**Certificate Creation**

* Finish implementation