

Name: As a Staff, I need to create a new Client (1384)

Description: MASC will be creating a single client that will be used by both Insurance and Lending and stored in Azure. A client may be either of the following:

- Individual
- Organization

The creation of a client may be triggered as a stand-alone process or in combination with another processes (i.e. Application for Insurance). During this phase, only the stand alone operation will be addressed.

The data entry pages are broken down as follows:

- Name
 - Individual version
 - Organization version
- Address
- Contact
- Members
 - Organization version only
- MASC Information
 - Individual version
 - Organization version

When the “Save” button is clicked, the entire client will need to be validated and saved. The “Address” and “Contact” entities/pages will be used in future development that isn’t client related. (i.e. Law Office, Insurance Company, MASC Office, Financial Institutions).

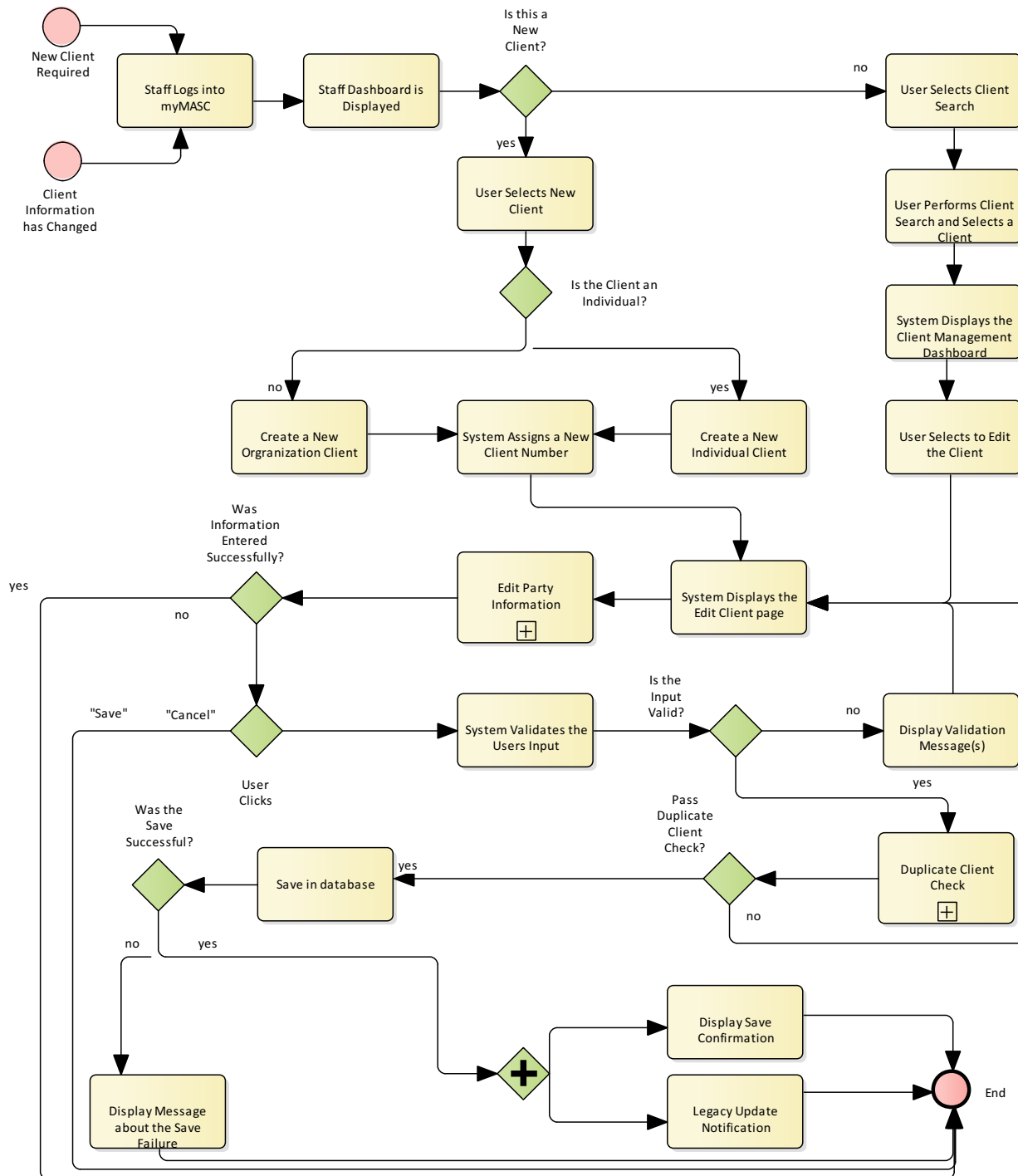
A check will need to be done to ensure that a duplicate client does not get created. If one does, there will be a process to remove this client from being visible in the database.

Note: Current client’s stored in DB2 and Oracle will be migrated into a single Azure client. Once completed, the DB2 and Oracle client will become read only and will be updated from changes that occur in Azure. This update will be automated.

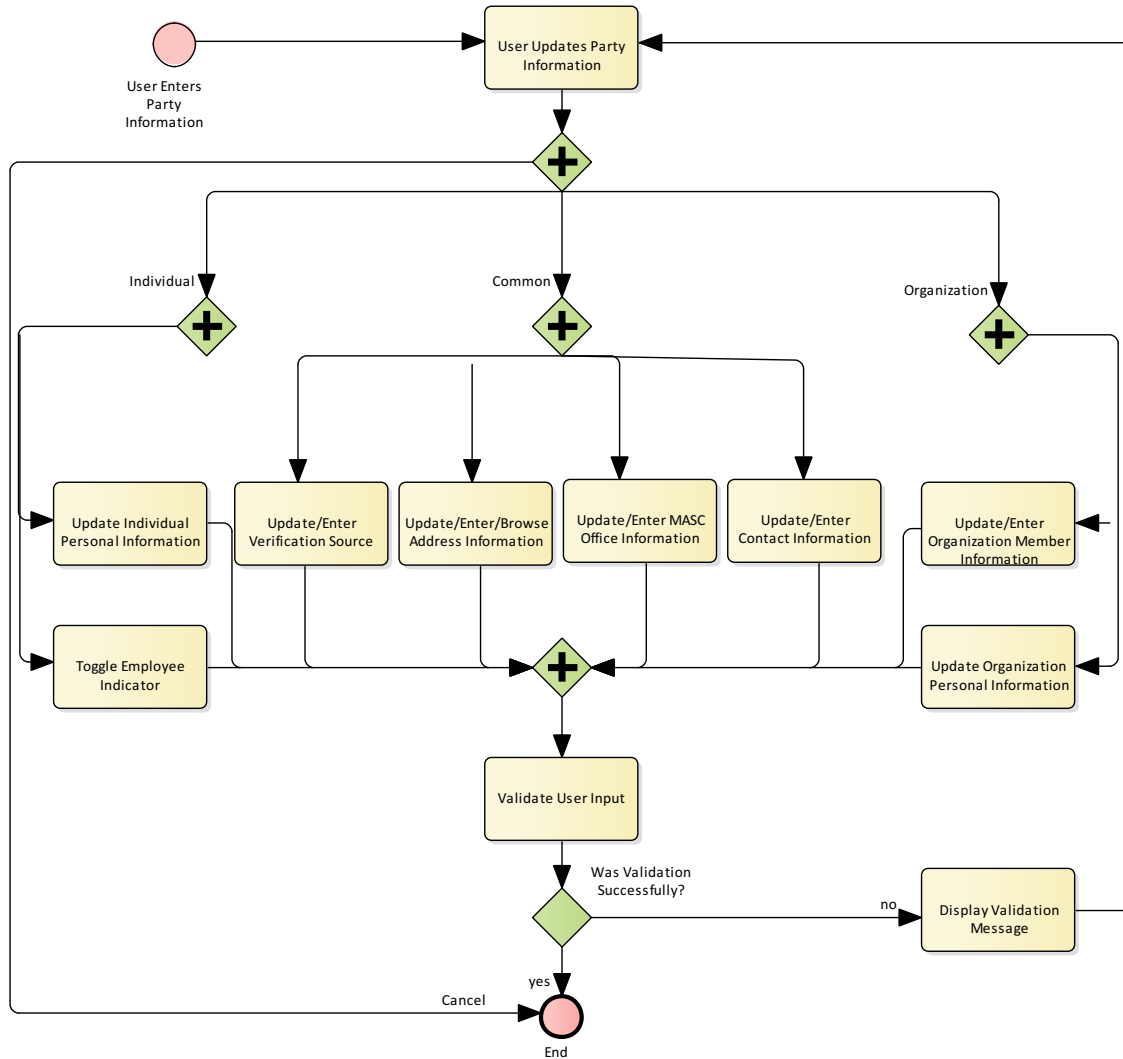
Preconditions: Staff as successfully logged into myMASC.

Basic Course

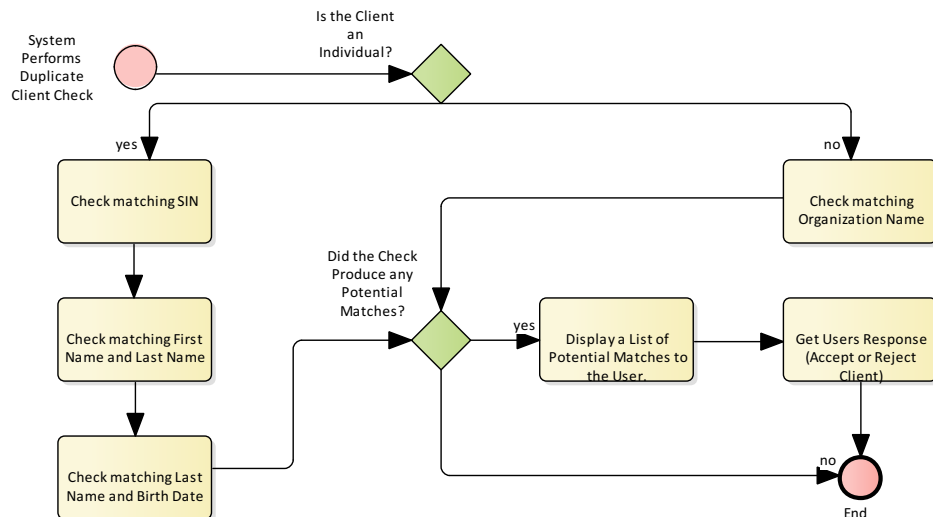
Client Setup / Edit (Level 4)



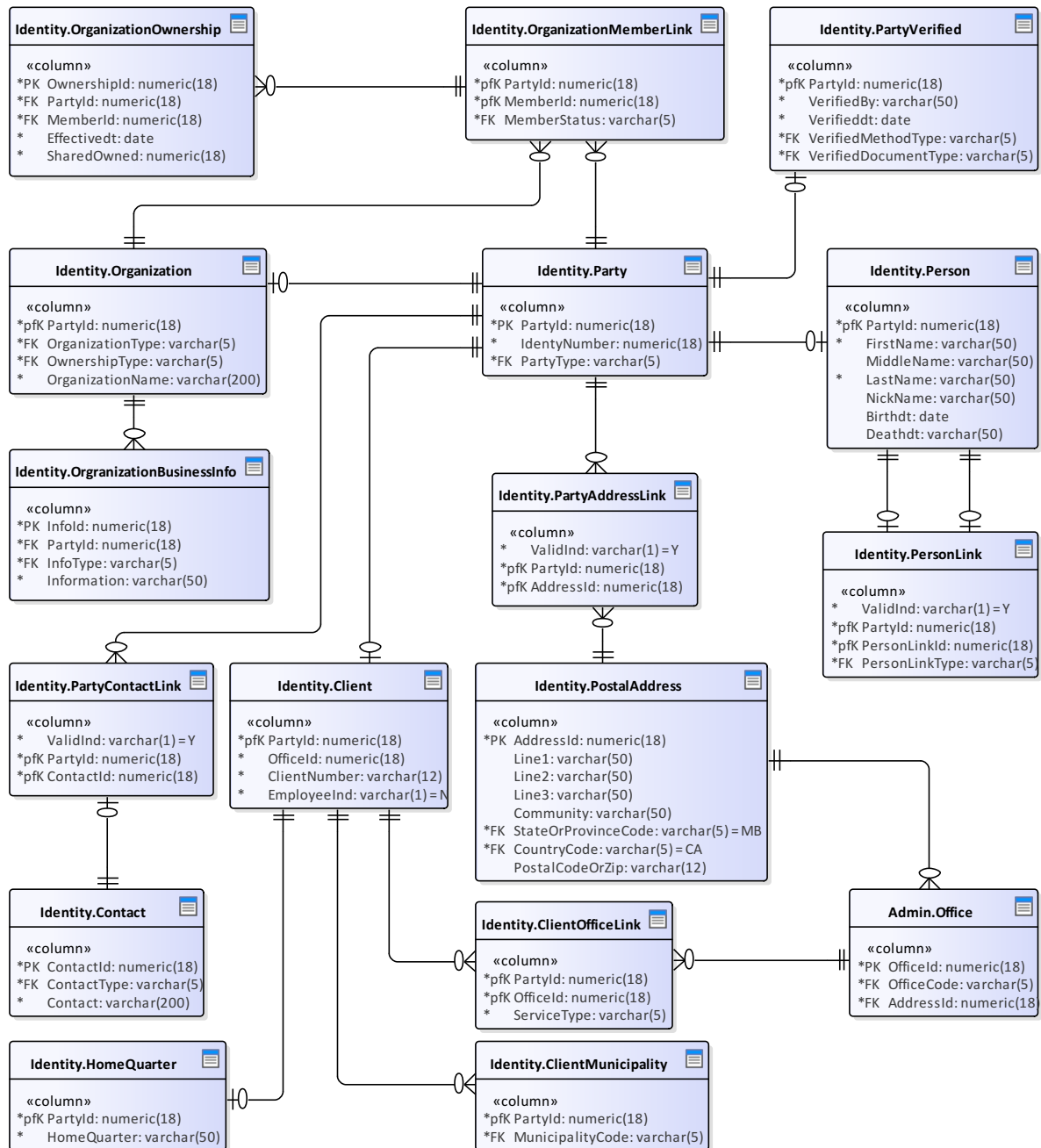
Client Setup / Edit - Enter Party Information (Level 4)



Client Setup / Edit - Duplicate Client Check (Level 4)



Database Diagram:



Desktop

MASC

DASHBOARD

<

CLIENT MANAGEMENT

<

🔍 Client Search

🕒 Recently Viewed

+ New Client

Hello Bob

>

Name

Address

Contact

MASC Information

Address - [client number] [complete name]

Address

Date of Birth

YYYY MM DD

Address 2

Date of Death

YYYY MM DD

Province

select

Verification Method

select

Country

select

Document Type

select

Postal

SAVE

or Cancel

MASC

Hello Bob

DASHBOARD

CLIENT MANAGEMENT

Client Search

Recently Viewed

New Client

Name

Address

Contact

MASC Information

Contact - [client number] [complete name]

Email

Home Phone

Cell Phone

Business Phone

SAVE

or Cancel

MASC

Hello Bob

DASHBOARD

CLIENT MANAGEMENT

Client Search

Recently Viewed

New Client

Name

Address

Contact

MASC Information

Contact - [client number] [complete name]

Insurance Office

Lending Office

☐ Is currently employed by MASC?

SAVE

or Cancel

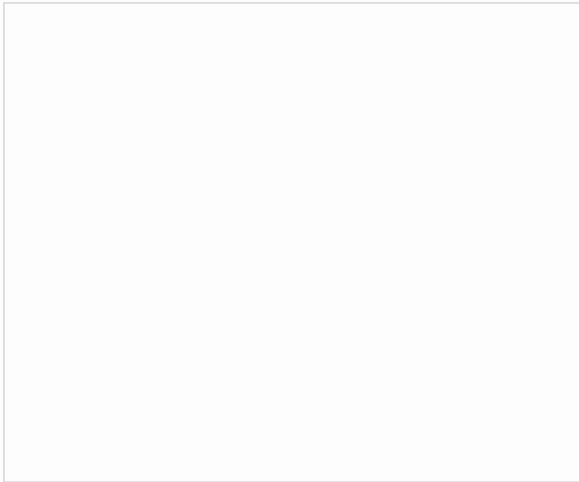
Mobile

🔍

CLIENT SEARCH

+

NEW CLIENT



myMASC

Hello Bob

Name

Address

Contact

MASC Information

Address - [client number] [complete name]

Address

Address 2

Province

select

Country

select

Postal

Date of Birth

YYYY MM DD

Date of Death

YYYY MM DD

Verification Method

select

Document Type

select

SAVE

or Cancel

myMASC

Hello Bob

Name

Address

Contact

MASC Information

Address - [client number] [complete name]

Address

Address 2

Province

Country

Postal

Date of Birth

Date of Death

Verification Method

Document Type

SAVE

or Cancel

myMASC

HELLO

HELLO

Hello Bob ▾

Name

Address

Contact

MASC Information

Contact - [client number] [complete name]

Email

Home Phone

Cell Phone

Business Phone

SAVE

or Cancel

Clickable Mockups

<https://testmascrml.azurewebsites.net/myMASCClient/sprint3/index.html>