This document provides the general requirements for the stated mockup.

# General

* The navigation of the mockup is done by the pink highlighted fields [you can also see what “page” you are on by looking at the “bookmarks” tab on the left of your screen
* The initial navigation clicking on the “User Name” field that provides a drop down is only for display purposes to show that there could be different types of users. The actual application will assess the user’s login credentials and will provide them to the appropriate screens within the application based upon their role [e.g. Debt Owner (Cascade user), Collection Agency, or Debt Buyer)

# Media Module

* Upon login, the “Main Dashboard” for the Media Module will be presented to the user
* This module provides the capability for the “Collection Agency” user to request media for the accounts they are collecting on, or to view the status of the media request(s) previously made
* Clicking the “Media” button while viewing the “Main Dashboard will take the user to the “home” screen of the Media Module

# Media Summary “Home” page

* This screen will display a “summary” of the media information
* The “picture” currently used for the “Media” on the home page of the Cascade application should be placed on this screen as a “placeholder” for right now
* Clicking the “Media” button will simulate the “mouse-over” function that would provide the drop down list containing: Request – By individual Account; Media ready for Download; and Media Request Not Yet Fulfilled

## Request – By Individual Account

* This screen will display the method for selecting the account to submit the media request for
* Clicking on either of the 3 highlighted selections will simulate the data entry for that selection as described below:

### By Client Account Number – Selection Field

* Clicking this option simulates what it would look like if the user entered the client account number
* This “Client Account Number” field is actually the PIMS account number [but the Agency Users are not familiar with PIMS, therefore this is titled “Client Account Number”]
* After entry of the client account number, the user will click the “Search” arrows to conduct the search of the information within the PIMS database and to populate the screens with the appropriate account information
* The specific account information retrieved will be presented in a “Verify Client Account Data…” box BELOW the “Retrieve Account Information…” box

### First or Last Name – Selection Field

* Clicking this option simulates what it would look like if the user entered the client named
* This entry could be the first or last name of the client, or even a partial entry [e.g. entering “John” would search for any first or last names that “start with” John]
* After entry of the client account number, the user will click the “Search” arrows to conduct the search of the information within the PIMS database and to populate the screens with the appropriate account information
* Since this search could retrieve multiple accounts, the information retrieved will be presented in a “table grid” on a new screen

#### Accounts Available from “By Name” Search Screen

* Depending upon the name [or portion of a name] entered in the “First or Last Name” selection field, this table grid will be provided that has a listing of all accounts that match the data entry to EITHER the First Name or the Last Name [or some portion thereof – see the mockup example of searching for “John” retrieves First name of “John” as well as Last name of “Johnson”]
* The data will be retrieved from the PIMS database and will be populated in the table grid
* The user will be able to “view details” on any of the accounts in the list [they will be taken to the “Select Media Type…” screen for the selected account]
* The mockup provides the simulation of what would happen if the highlighted “View Details . . .” is clicked

### Original Account Number – Selection Field

* Clicking this option simulates what it would look like if the user entered the original account number
* This “Original Account Number” field is actually the PIMS original account number [but the Agency Users are not familiar with PIMS, therefore this is titled “Original Account Number”]
* After entry of the original account number, the user will click the “Search” arrows to conduct the search of the information within the PIMS database and to populate the screens with the appropriate account information
* The specific account information retrieved will be presented in a “Verify Client Account Data…” box BELOW the “Retrieve Account Information…” box

### Verify Client Account Data… Screen

* When the user is taken to this screen from either of the two search options mentioned above, the user will verify the account information and click the “View Media” button

### Select Media Type…Screen

* This is the screen that allows the user to select what types of media they would like for the selected account
* This screen presents all of the media types that are available [**note**: not all media types will be available for every account, but the screen should always provide the full list of media types]
* BEFORE this screen is presented, our application should retrieve the NAMES of all of the media that fall into each of the media types for the specific account selected
  1. We are ONLY presenting the name of the media files but NOT the hyperlink to those media files
  2. This will be a visual cue to the user that some of the media may already exist and should, therefore, be available from Cascade nearly immediately
* By clicking on the highlights within the mockup, it simulates what would happen when the user clicks the different “check boxes” [either the “Select All” check box, or the individual media type check boxes]
* The “Submit…” buttons at the bottom of the screen will ONLY be enabled once AT LEAST one of the check boxes has been “checked”
* NOTE: Only the “Statement” media type will have a “date selection” capability with it so that the user can select ANY statements that fall within a specified time frame

#### Submit & Exit

* Clicking this option will submit the request and take the user back to the “Media” dashboard

#### Submit & Request More

* Clicking this option will submit the request and take the user back to the “Request by Individual Account” screen so they could search for another account to submit a request on

## Media Ready for Download

* This screen will display a “summary” of the media that is available for download by the user
* They will have the ability to download any specific item in the list, or the ability to download “all” of the media currently available
* NOTE: if an account has multiple types of media available for download, they will be shown on different lines within the table grid [since those different media may have been on different days and will therefore be tracked separately]
* The “Search” feature is available for the user to search “within this table grid ONLY” to find a specific account by searching on any one of the columns of information in the grid
* The user could also export the table grid to excel which would produce an excel file that contains ONLY the columns of data presented on the screen [the columns in the excel file would be in the same order as they are in the table grid on the screen]

## Media Request Not Yet Fulfilled

* This screen will display a “summary” of the media that has been requested but not yet available for download
* They will have the ability to “request a status update” for any specific item in the list, or the ability to request a status update on all of the items in the list
* The “Search” feature is available for the user to search “within this table grid ONLY” to find a specific account by searching on any one of the columns of information in the grid
* The user could also export the table grid to excel which would produce an excel file that contains ONLY the columns of data presented on the screen [the columns in the excel file would be in the same order as they are in the table grid on the screen]