Requirements/Design Specification

**Broker Code**

**GH 248 – CR 14088**

Revision History

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| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 5/18/2015 | 1.0 | Initial Version with Requirements | Roger Behm |
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# Business Requirements/Owner – Rich Simon

# We need to be able to tag a quote as a Broker quote.

# Assumptions

Marieke Curley has confirmed that we **do not need** to add the Broker trans/reason codes of 01/34 and 04/34. She confirmed that programming the BRKxxx SalesID will be proper coding for the STR.

# Design

Requirements

* For New and Existing customers
* Includes Commercial and Industrial lines of business
* Sales ID (Office Use Only CSA) would read BRKxxx where the xxx is the 3 digit InfoPro division number
* Use the same functionality now or down the road for Nations Account (SalesID = NATACTxxx)

**Implemenation Options**

**Option 1 -** Add a “Broker” checkbox on the finalized screen with the other 10 recently added.

Pros:

* Easiest and quickest to implement

Cons:

* We could never modify margins/guardrails to take into account this is a broker quote

**Option 2 -** Add a broker option to the Sales Activity dropdown on the first screen

Pros:

* It is easy user expirence and will not get lost
* Gives us ability to add a premium to the guardrails

Cons:

* Would need two options one for existing and one for new
* More programming work than option 1

**Option 3 -** Add a broker checkbox to the config screen for both large and small containers

Pros:

* Gives us most flexibility to apply broker code to individual container and give us the ability to add a premium to the guardrails. However I’m not sure it is needed

Cons:

* Most work for us on the programming side

# InfoPro/TIBCO/BI Impacts

No new variable should be needed and no existing variables should be repurposed for any of the above changes.

# Report Changes

NA

# Appendix