1. Dashboard/
   1. Quick Client Search/Save Changes
      1. Not working!
      2. Do we need this? Edit policies does same?
2. Edit Policies in Database/
   1. Agency Estimated Comm/Revenue (CRM)
      1. UI Not calculating this amount.
         1. FORMULA: Premium Sold x Policy Gross Comm %
3. Edit Policies in Database/
   1. Agent Estimated Comm $
      1. UI Not calculating this amount.
         1. FORMULA: Premium Sold (x) Policy Gross Comm % (x) Agent Comm (NEW 50% RWL 25%)
4. Edit Policies in Database
   1. Can’t sort any columns!
5. Edit Policies in Database
   1. Agent Comm (NEW 50% RWL 25%)
      1. Should be (0.50 or 50%)

**Phase 0 Testing Checklist**

1. Application Startup

- Application starts without errors

- Can log in successfully

- All menu items are accessible

2. Edit Policies - Search & Display

Test 2.1: Regular Transactions Only

- Search for customer with ONLY regular transactions

- Verify: "Found X transactions for editing"

- All transactions appear in data editor

- Can select with checkboxes

Test 2.2: Mixed Transactions

- Search for customer with BOTH regular AND reconciliation

- See TWO messages:

- "Found X editable transactions" (green)

- "🔒 Y reconciliation entries (view in Reconciliation page)" (blue)

- ONLY regular transactions in data editor

- NO -STMT-, -VOID-, -ADJ- visible

Expected Results:

1. Two messages at the top:

- ✅ "Found 1 editable transaction" (in green)

- 🔒 "1 reconciliation entry (view in Reconciliation page)" (in blue info box)

2. In the data editor:

- ✅ ONLY the regular transaction (7C8LPL9) should be visible

- ❌ The -STMT- transaction should NOT appear in the editor

3. What you can do:

- Select and edit the regular transaction

- Cannot see or select the reconciliation entry

Test 2.3: Reconciliation Only

- Search for "-STMT-" directly

- Warning: "No editable transactions found"

- NO data editor shown

3. Edit Policies - Editing

Test 3.1: Edit Regular

- Select and edit regular transaction

- Form opens normally

- Changes save properly

Test 3.2: Edit Reconciliation

- If reconciliation appears, try to edit

- Error: "🔒 This is a reconciliation transaction"

- Directed to use Reconciliation page

4. Edit Policies - Deletion

Test 4.1: Delete Regular

- Select regular transactions

- Delete works normally

Test 4.2: Delete Reconciliation

- If reconciliation appears, try to delete

- Error: "🔒 Cannot delete X reconciliation transaction(s)"

- Transactions NOT deleted

5. Data Integrity

Test 5.1: Reconciliation Page

- All -STMT-, -VOID-, -ADJ- visible there

- Functions work normally

Test 5.2: Transaction Counts

- Editable count + Reconciliation count = Total count

6. Edge Cases

- Special character searches work

- Auto-save doesn't affect reconciliation protection