**Master Screen**

This page is shown while clicking on the ‘Masters’ menu from the left side of the application

**Master List:-**

* This is the landing page for the Masters screen
* It has the below fields:-
  + ***Select Product***
    - Drop down
    - No default value is selected. It is used for create master
    - ***Technical Spec:*** 
      * Values are coming from the query
      * Key - UDS\_PRODUCT.UP\_PROD\_ID
      * Value - UDS\_PRODUCT.UP\_PROD\_NAME
  + ***Select Product Type*** - Drop down. It is not required
  + ***List***
    - Default list should be shown
    - Pagination is required
    - ***Search filter***
      * The below columns has search filter. The list will populate based on the search filter
        + Master Policy No
        + Customer Name
        + Product Type
      * Reset icon - It will reset the search filter
    - ***List has the below columns***
      * Expand/Collapse option - It will show if child records are available. Otherwise, hide the icon
      * Master Policy No
      * Customer Name
      * Product Type
      * ***Status*** - BG color should be shown as per the Invision.
        + QUOTE - New master policy
        + ENDORSEMENT REQUESTED - Updated existing issued policy
        + POLICY ISSUED - Approved master policy
        + CANCEL - Canceled master policy
        + RENEWAL QUOTE - Existing master policy is submitted for renewal
      * Updated Date
      * ***Actions***
        + It will hide for the child records or the status as ‘Cancel’
        + Edit - if status as ‘Quote’ or ‘Endorsement Requested’
        + Cancellation - if status as ‘Policy Issued’
        + Renew - if status as ‘Policy Issued’
        + Endorsement - if status as ‘Policy Issued’
        + Need to show the pop up to capture the effective date and reason for the below actions:-

Endorsement

Cancellation

* + - * ***Technical Spec:-***
        + The list will be populated from the below tables and details should be fetched from the respective tables for the view/edit

Quote and Endorsement Requested - UTDS\_LEVEL\_M

Policy Issued - UPDS\_LEVEL\_M

Renew Quote - UTDS\_LEVEL\_M

Cancel - UPDS\_LEVEL\_M

* + - * + Need to call the procedure to copy the data from UP to UT for the below actions:-

Endorsement

Renew

Cancellation

* + - * + Should not allow any endorsement if the prior endorsement approved for the effective date range or any of the master policy is available with the combination of product, risk and effective date range.

**Create a New Master Policy:-**

* Do not allow to create master without selecting the product from the drop down
* Navigate to ‘CUSTOMER DETAILS’ page after clicking the ‘CREATE MASTER’ button
* ***CUSTOMER DETAILS:-***

***This page contains the information about customer and effective date details for the master policy***

* + There is no master policy no shown here
  + All the endorsement related details should be hidden like effective date, status, sub status, reason, remarks, etc.,
  + The below sections should be shown in the order
    - POLICY DETAILS
    - CUSTOMER DETAILS
    - POINT OF CONTACT
    - GENERAL INFORMATION
  + ***POLICY DETAILS:-***
    - ***Division***
      * Drop down.
      * Values are coming from the query
      * Logged user’s division should be selected by default
    - ***Department***
      * Drop down.
      * Values are coming from the query
      * Logged user’s department should be selected by default
      * The values should be reloaded based on the division selection
    - ***SOB*** - not required
  + ***CUSTOMER DETAILS:-***
    - All values should be displayed in the label. There is no edit option is required.
    - All values are coming from the query
    - There is no change in the field order
  + ***POINT OF CONTACT:-***
    - All values should be displayed in the label. There is no edit option is required.
    - All values are coming from the query
    - Fields should be shown in the below orders for 1st and 2nd level
      * Prefix
      * First Name
      * Middle Name
      * Last Name
      * Suffix
      * Designation
      * Post Box Number
      * Address Line 1
      * Address Line 2
      * Address Line 3
      * Country
      * Phone No
      * Fax No
      * Mobile No
      * Email ID
  + ***GENERAL INFORMATION:-***
    - Policy Terms - Drop down. Values are coming from the query
    - Effective From Date
      * Date Picker
      * Default - Current Date with midnight. Ex: 19-Dec-2018 00:00:00
    - Effective To Date
      * Auto calculate and read only. If selected policy term is other than *Custom*.
      * Ex: Policy term as 4 years. The to date is 19-Dec-2022 59:59:59
      * User can change the date if selected policy term as *Custom*
  + ***DISCARD:-***
    - Button
    - Do not save the information and navigate to master list page
  + ***SAVE:-***
    - Button
    - Save the information to the UT tables and display the quote no. at the top as mentioned in the Invision
  + ***NEXT:-***
    - Button
    - Save the information to the UT tables and display the quote no. at the top as mentioned in the Invision. Then navigate to COVERAGE page.
* **COVERAGE:-**

***This page contains the risk and coverage details for the master policy.***

* + It has two sections are displayed in the horizontal view:-
    - Employee Category
    - Coverage Details
  + ***Employee Category:-***
    - *Add New*
      * To show the pop up with the below items
        + Risk Type

Drop down

Value are coming from the query

Do not allow to select duplicate risk type

* + - * + Remarks - Text area
        + Add - Button
        + Cancel - Button for close the pop up without adding a new risk type
    - *List:-*
      * Values are coming from the query and it has the below columns:-
        + Status - Toggle
        + Employee Category
        + Remarks
        + Premium
      * Toggle on by default for active risk type
      * User can active only one risk at a time
      * Toggle on the risk type and toggle off the other risks If user select the row
  + ***Coverage Details:-***
    - Display coverage details for the active risk type by default
    - *Employee Category*
      * Label
      * Display the selected risk type
    - *Coverage*
      * Drop down
      * It has the below values. Values may be coming from the query else we can hard code it.
        + Basic Cover
        + Optional Cover
      * Coverage list
        + Values are coming from the query
        + Those are items has the values of mandatory as Y in the query, it should be list under Basic Cover. It should be selected by default and user should not deselect
        + Those are items has the values of mandatory as N in the query, it should be list under Optional Cover. User can able to select/deselect items
        + User can edit the checked coverage limit only. The min and max of the coverage limit coming from the same query
      * Premium
        + Amount

Number text box

Can not be 0

* + - * + VAT - Label and this value will coming from the query
        + % - Label. It will be %, if the value which is coming from the query is 100. It will be *Flat*, if the value which is coming from the query is 1. Based on this, the amount will calculate and display the amount
      * CANCEL
        + Button
        + It will reset the values in the Coverage Details section
      * SAVE
        + Button
        + It will store the values in the session for the policy risk type
  + **PREVIOUS*:-***
    - Button
    - Save the information to the UT tables and display the quote no. at the top as mentioned in the Invision. Then navigate to CUSTOMER DETAILS page.
  + ***DISCARD:-***
    - Button
    - Do not save the information and navigate to master list page
  + ***SAVE:-***
    - Button
    - Save the session information to the UT tables
  + ***NEXT:-***
    - Button
    - Save the information to the UT tables and display the quote no. at the top as mentioned in the Invision. Then navigate to POLICY FORM page.
* **POLICY FORM:-**

***This page contains the term and conditions for the master policy***

* + Add New
    - It will show the pop up with the below items
      * Section
        + Drop down
        + The default values are Endorsement, Exclusions and Warranties. It may be coming from the query
      * Status - Toggle
      * Clauses & Conditions & Extensions - Text box (Short description)
      * Type

Drop down

Values are coming from the query

* + - * Description - Text Area (Detailed description)
    - No restriction to select the section and type
  + Sections
    - Each and every sections should be displayed as a separate box
    - Each and every sections has the list with below columns
      * Status
        + Toggle
        + It will set based on the status in the query
      * Seq No. - Running number for this section
      * Clauses & Conditions & Extensions
      * Type
      * Description
        + Display 100 characters and put the link *More*. Show the pop up with full detailed description in the read only mode.
      * Edit
        + Show the pop up with all the details in the edit mode.
  + **PREVIOUS*:-***
    - Button
    - Save the information to the UT tables and display the quote no. at the top as mentioned in the Invision. Then navigate to COVERAGE page.
  + ***DISCARD:-***
    - Button
    - Do not save the information and navigate to master list page
  + ***SAVE:-***
    - Button
    - Save the session information to the UT tables
  + ***NEXT:-***
    - Button
  + Save the information to the UT tables and display the quote no. at the top as mentioned in the Invision. Then navigate to CO INSURER DETAILS page.
* **CO INSURER DETAILS**

***This page contains the share details between DIC and their co-insurer for the master policy***

* + This page has the below sections
    - Our Share
    - Co Insurer Details
  + Our Share
    - Enter Our Share %
      * Number text box
      * The value will auto calculate like 100 - sum of co-insurer share
  + Co Insurer Details
    - Remove - It will removed the selected co-insurer from the list and auto calculate the our share
    - Add New
      * It will show the pop up with the below items
        + Company Name

Drop down

Do not allow to select duplicate company name

* + - * + %Share - Numeric text box
        + Leader Fee Rate - Numeric text box
        + Leader Fee Rate Per -

Drop down and values are coming from the query

When leader Fee Rate Per is Flat – No validations, Per – Upper limit is 100, Per mille – Upper limit is 1000

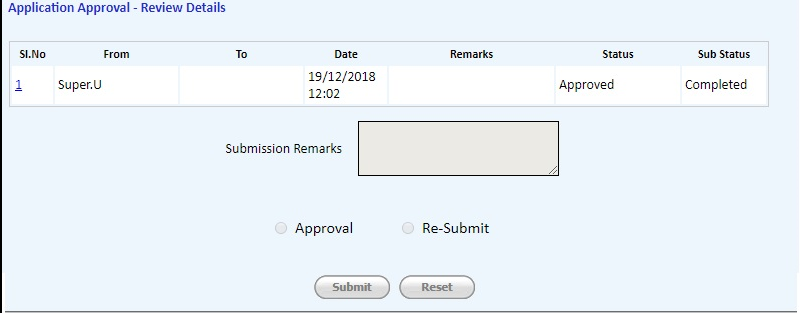
* + - * + Retrocedent % - Numeric text box
        + Retrocedent Commission % - Numeric text box
      * Do not allow to add the co-insurer, if difference between our share and sum of the co-insurer share is > 0
      * After adding a new co-insurer, it will auto populate in the list and calculate the our share
      * The other columns wherever there is a percentage, the upper limit is 100
      * The values can be 0, except for the share
      * Note: Details should be populated in the table UTDS\_LEVEL\_IC with ULR\_ID as \* and call the procedure to populate other details.
    - List
      * It has the below columns:-
        + Checkbox - It will use to select multiple co-insurer for remove
        + Company Name
        + % Share
        + Leader Fee Rate
        + Leader Fee Rate Per
        + Retrocedent %
        + Retrocedent Commission %
        + Edit

It will show the popup with the details. Should no allow to change the company name

Do not allow to add the co-insurer, if difference between our share and sum of the co-insurer share is > 0

After updating a co-insurer, it will auto update in the list and calculate the our share

* + - Total Co Insurer’s share
      * Label
      * It will display the value of sum of co-insurer share
  + **PREVIOUS*:-***
    - Button
    - Save the information to the UT tables and display the quote no. at the top as mentioned in the Invision. Then navigate to POLICY FORM page.
  + ***DISCARD:-***
    - Button
    - Do not save the information and navigate to master list page
  + ***SAVE:-***
    - Button
    - Save the information to the UT tables
  + ***SUBMIT***:-
    - Button
    - It mean submit the changes for approval
    - Pop up mentioned in Invision is not required.
    - Disable this button if already submitted
    - Show the pop up with the below items:-



* + - * History list for the master policy should be displayed with the below columns:- (This list will not displayed while submitting new master policy)
        + S.No
        + From
        + To - Group/user
        + Date - Date with time
        + Remarks - User entry while submission
        + Status
        + Sub Status - Not required
      * Submission Remarks - Textarea
      * Submit - Button. It will submit the master policy for approval
      * Cancel - Button. It will close the pop up.

**View Master Policy by Reviewer/Approver:-**

The below details should be shown for all the pages as a header:-

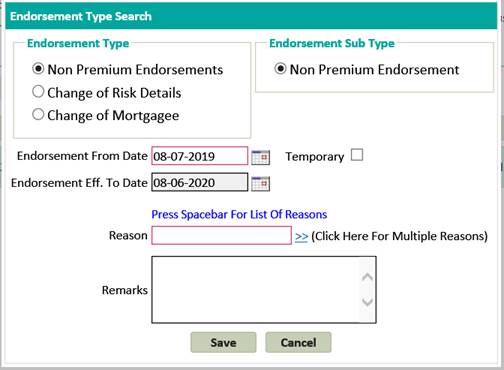
* Product
* Policy from date
* Policy to date
* Submission remarks entered by user
* Effective from and to date if endorsement requested or cancel

**Edit Master Policy:-**

* Edit option is available for the below status of the master policy
  + QUOTE
  + ENDORSEMENT REQUESTED
* User can not edit the information if it is already submitted for approval. They can only view the details.
* Display the unsaved data pop up if navigate page without save

**Endorsement:-**

* + Show the pop up to capture the effective date and reason for the below actions:-



* + - Endorsement Type and Sub Type - Radio option
      * Allow to edit cover, premium and co-insurer details based on the selection
    - Endorsement from date - date picker
    - Endorsement Effective to date - Disabled. Auto populate. 11 months calculated from ‘From Date’ value.
    - Reason - Dropdown. Values are coming from the query
    - Remarks - Text area
    - Save - Button
    - Cancel - Button
    - Endorsement Type and sub types will be combined and we will have possible combincations in a single drop down
    - From Date & To Date on the same line, no update to To Date allowed
    - Reason to be a drop down.
  + Call the procedure to copy the data from UP to UT
  + Should not allow any endorsement if the prior endorsement approved for the effective date range or any of the master policy is available with the combination of product, risk and effective date range.
  + Will be allowed to edit either the co insurer section or the coverage.
  + When we allow the coverage section to be edited, the user should not be able to edit/Add the employee category and the other details except the premium.
  + When we allow the co-insurer section to be edited, they can edit anything there.
  + User can not edit the details except cover, premium and co-insurer details. Those details will be editable based on the selection in the pop up.
  + When we update a Premium, we will update the CS, TCF and I. Rectype - U
  + When we update a Coverage limit/add a new cover, we will update CS/Insert C & CS, Rectype- U- for update cover. For add a new cover RecType - I
  + When we remove an optional cover, we will update C & CS with Rectype- D – In the UI, we can show them as RED CROSSED instead of checked.

**Cancellation:-**

* + Show the pop up has the below fields for Cancellation
    - Cancellation from date - date picker
    - Cancellation Effective to date - Disabled. Auto populate. 11 months calculated from ‘From Date’ value.
    - Reason - Drop down. Values are coming from the query
    - Remarks - Text area
    - Save - Button
    - Cancel - Button
  + Call the procedure to copy the data from UP to UT

**Renewal:**

* Call the procedure to copy the data from UP to UT and update the policy from and to date.
* Should not allow to edit the details

**Approval Workflow:-**

* Identify the user level by the query before showing the pop up. Because, the buttons will vary based on the user level.
  + 1 - Created user
  + 2 - Reviewer
  + 3 - Approver
* If the user level is creator, then the below buttons will shown:-
  + Submit - Button. It will assigned to the next level of user. Assigned to approver if reviewer will create this master policy.
  + Cancel - Button. It will close the pop up.
* If the user level is reviewer, then the below buttons will shown:-
  + Review - Button. It will assigned to approver based on the next level in the query
  + Reject - Button. It will mark as the master policy as rejected and assigned to the created user
  + Cancel - Button. It will close the pop up.
* If the user level is creator, then the below buttons will shown:-
  + Approve - Button. It will mark as approved and follow the work flow for approved master policy like calling the procedure to move the date from UT to UP and UH
  + Reject - Button. It will mark as the master policy as rejected and assigned to the created user
  + Cancel - Button. It will close the pop up.
* Verify any other activity by the query before showing the pop up. Because, we should complete all the pending activities
* Before submitting the master policy, execute the query the to get the current app level. Because, user/reviewer/approver can submit the master policy. App level as 1 if the query did not return any value.
* Based on the above app level, fetch the next level. Next level should be current level + 1. If the above app level as 2, not require to assign to the reviewer. You can directly assign it to the approver.
* If logged user is within the specified role/user group, they can able to review/approve the master even not listed in the work basket.
* Show the remarks as pop up in the customer details page if the submitted master policy is rejected
* While moving the level, data should be inserted in the tables WTDS\_LEVEL\_APP and WTDS\_LEVEL\_A as per the DB mapping sheet.