

May 30, 2017

Hello Suraj,

As per our initial conversation, I have included the follow up items below:

Data examples for demo:

Surety Companies	Agencies	Agents
American First Surety Company	Ami First Bail Bonds	Barry Golfberg
Capitol Surety Bail Company	Capitol Bail Bonds	Sally Summerset
Bail Bonding Insurance Company	Great South Bail Bonding	Grant Bishop
Bail Surety and Indemnity Company	Mint Valley Bail Bonds	Bold Altman
Great West Surety Company	Great West Bail Service	Victor Washington
Hardford Surety Insurance Company	Hardford Bail Bonds	Dwayne Smith
Hudson River Surety Company	Hudson River Bail Bonds	Andrew Smalltown
Fordelity First Surety Company	Fordelity Bail Bonds	Pablo Goldsmith
Lexington Surety Company	Lexington City Bail Bonds	Xavier Montgomery
First Out Surety Company	First Out Bail Bonds	Roger Montana
National Surety Insurance Company	North Valley Bail Bonds	Dennis Locksmith
Great North Surety Insurance Co	Great North Bail Service	George Graysome
Old Country Surety Company	Old Country Bail Bonds	Mary White
Old Town Surety Company	Old Town Bail Bonds	Valery Gomez
Phili Surety Insurance Company	Phili Bail Bonds	Thomas Anderson
Colorado River Surety Company	Colorado River Bail Bonds	Courtney Hightown
CBB Surety Company	CBB Bail Bonds	Steven Franklin
BailTec Surety Company	BailTec Bail Bonds	Walter Jackson

Please ignore spelling issues in these fictitious names.

For the 'Suspend Agent' interface:

<input type="checkbox"/> Suspend Statewide	<input type="checkbox"/> Suspend in County [Alameda County] <County List>
	[Suspend] <button>

Same for 'Suspend Agency' interface:

<input type="checkbox"/> Suspend Statewide	<input type="checkbox"/> Suspend in County [Alameda County] <County List>
	[Suspend] <button>

Note:

Top menu bar should now include state:

<u>California</u> : CBB Surety Company	----	Dashboard
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Users will be required to select a state, or be defaulted to a state, since DOI is state specific.

California Counties (Can use a subset for the county list)

Alameda County	Madera County	San Joaquin County
Alpine County	Marin County	San Luis Obispo County
Amador County	Mariposa County	San Mateo County
Butte County	Mendocino County	Santa Barbara County
Calaveras County	Merced County	Santa Clara County
Colusa County	Modoc County	Santa Cruz County
Contra Costa County	Mono County	Shasta County
Del Norte County	Monterey County	Sierra County
El Dorado County	Napa County	Siskiyou County
Fresno County	Nevada County	Solano County
Glenn County	Orange County	Sonoma County
Humboldt County	Placer County	Stanislaus County
Imperial County	Plumas County	Sutter County
Inyo County	Riverside County	Tehama County
Kern County	Sacramento County	Trinity County
Kings County	San Benito County	Tulare County
Lake County	San Bernardino County	Tuolumne County
Lassen County	San Diego County	Ventura County
Los Angeles County	City and County of San Francisco	Yolo County
		Yuba County

From 'Surety Home' interface, the following functionality is also required:

1. Total Liabilities icon should be clickable:
 - drops down to a page of posted bonds sorted in descending order on the bond amount
 - Allow paging
 - Allow filtering and query by date range on posted date
 - Allow click through on Agency (to Agency detail), Agent (To Agent Detail), Bond Amount (to Bond Detail)
 - List Agency Name, Agent Name, Bond Id, Bond Amount, Date Posted, Next Court Date
2. Total Quota Remaining icon should be clickable:
 - drops down to a page of draft bonds sorted in ascending order on the entry date
 - Allow paging
 - Allow filtering and query by date range on entry date
 - Allow click through on Agency (to Agency detail), Agent (To Agent Detail), Bond Amount (to Bond Detail)
 - List Agency Name, Agent Name, Bond Id, Bond Amount, Entry Date, Detention Center Name
3. Bonds in Forfeiture icon should be clickable:
 - drops down to a page of bonds in forfeiture sorted in descending order on the bond amount
 - Allow paging
 - Allow filtering and query by date range on posting date
 - Allow click through on Agency (to Agency detail), Agent (To Agent Detail), Bond Amount (to Bond Detail)
 - List Agency Name, Agent Name, Bond Id, Bond Amount, Date Posted, Next Court Date
4. Summary Judgement Unpaid icon should be clickable:
 - drops down to a page of bonds with SJU sorted in descending order on the bond amount
 - Allow paging
 - Allow filtering and query by date range on posting date
 - Allow click through on Agency (to Agency detail), Agent (To Agent Detail), Bond Amount (to Bond Detail)
 - List Agency Name, Agent Name, Bond Id, Bond Amount, Date Posted, Last Activity Date
5. From the 'Top Five Agency' lists, on current interface:
 - Drill down from Agency Name to the same agency detail interface from the Agency menu option
 - Drill down from the Forfeited \$ to the list of bonds in forfeiture for the agency. Same functionality on the bond list as in item 3.
6. From the 'Top Five Agents' lists, on current interface:
 - Drill down from Agent Name to the same agent detail interface from the Agent menu option
 - Drill down from the Forfeited \$ to the list of bonds in forfeiture for the agent. Same functionality on the bond list as in item 3.