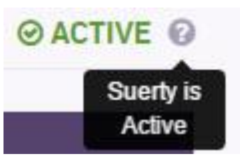
Hello Suraj,

Just to clarify some other items from our conversation regarding specifications from the original worksheet.

The active indicator for an agent or an agency, shown after either is selected, is related to the suspension status with the surety company, and not the fact that the agency or agency was bonded. Using the word bonded is very confusing, but I am assuming it is already industry jargon that must be adhered to.

I will define bonded, as related to bonding an agent or agency, as the process of affiliating the agent or agency to a specific surety company.

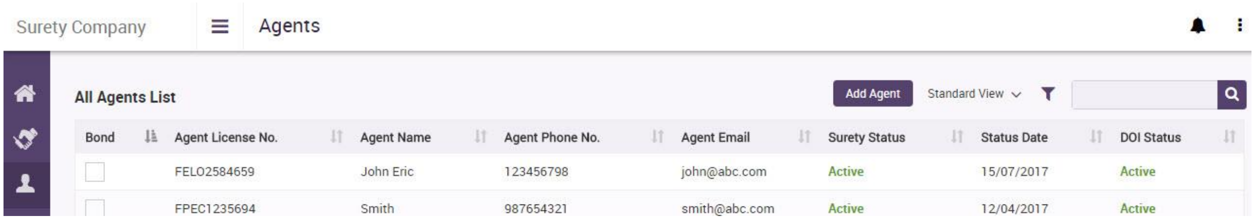
So, as already indicated with scroll over note:



On the **<u>agent interface</u>**, the active indicator is green and checked if the **<u>agent</u>** is not suspended by the surety company. I am assuming the indicator should be **<u>red and unchecked</u>** if the **<u>agent</u>** is suspended with the surety company.

On the **<u>agency interface</u>**, the active indicator is green and checked if the **<u>agency</u>** is not suspended by the surety company. Likewise, I am assuming the indicator should be **<u>red and unchecked</u>** if the **<u>agency</u>** is suspended with the surety company.

On the Agent interface:



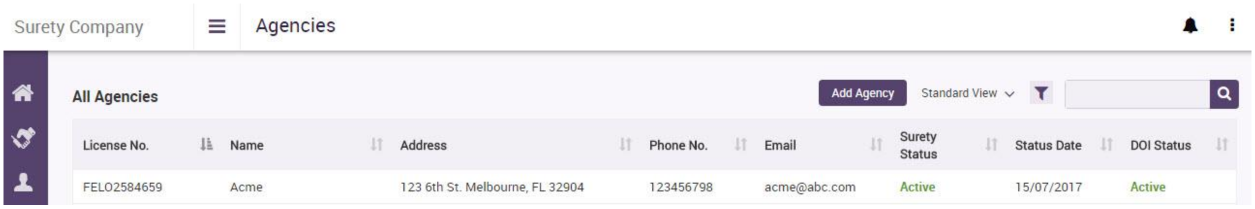
Here is my solution for how to fix the ambiguities that still exist on the interface:

1. Change the 'Bond' column heading to "Bonded". The checkmark box for this column has duel purposes.
2. Agents that are already affiliated (bonded) to the surety company, that are listed on the display, are checked and the checkmark boxes are **inactivated** (can't be unchecked), for those agents.
3. Agents that are in the Validify system, that are not affiliated (bonded) to the surety company, have active (checkable) checkmark boxes.
4. When an agent is CHECKED, which is only possible for unaffiliated agents:
   - Display a window, copy the 'Add Agent' window, with the data for the CHECKED agent filled in and read only.
   - Label this window 'Bond this agent' and change the button label to 'Bond Agent'.
   - If the user clicks the 'Bond Agent' button, close the window and inactivate the checkmark box for the agent just affiliated (bonded), and mark the status and status date.
   - If the user cancels the 'Bond this agent' window, then uncheck the selected row.

5. Surety Status and Status Date should be empty for unaffiliated agents.

The above is verbose, but needed.

Same for the agency interface:



Here is my solution for how to fix the ambiguities that still exist on the interface:

1. Introduce a ‘Bonded’ column as the first column. The checkmark box for this column will have the same functionality as the agent’s interface.
2. Agencies that are already affiliated (bonded) to the surety company, that are listed on the display, are checked and the checkmark boxes are **inactivated** (can’t be unchecked), for those agencies.
3. Agencies that are in the Validify system that are not affiliated (bonded) to the surety company, have active (checkable) checkmark boxes.
4. When an agency is CHECKED, which is only possible for unaffiliated agencies:
   - Display a window, copy the ‘Add Agency’ window, with the data for the CHECKED agency filled in and read only.
   - Label this window ‘Bond this agency’ and change the button label to ‘Bond Agency’.
   - If the user clicks the ‘Bond Agency’ button, close the window and inactivate the checkmark box for the agency just affiliated (bonded), and mark the status and status date.
   - If the user cancels the ‘Bond this agency’ window, then uncheck the selected row.

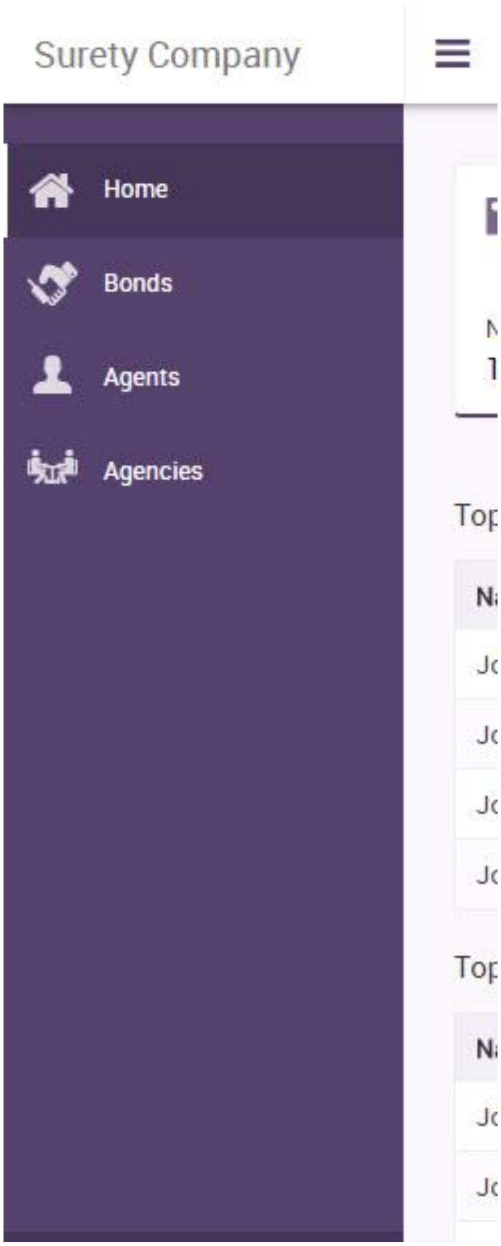
5. Surety Status and Status Date should be empty for unaffiliated agencies.

The above is verbose, but needed.

Please note:

I overlooked some requested functionality during my initial review of the specifications, that must be corrected.

The Surety Home Menu:



When expanded, as above, should show submenu items:

Bonds

-Mark Bonds Paid

-Mark Bonds Posted

-Bond Limit Requests

Agents

-Bond Agents

-Censor Agents

-Review Agents

Agencies

-Bond Agencies

-Censor Agencies

-Review Agencies

-Set Quotas

Admin

-Users

-Alerts

-DOI Actions

Note: Even if some submenus activities are incorporated into one interface, the submenu functionality will be required for items without specifications, and the intro of new items.

I think the All Bonds List, under bonds, will be like the queue for pending surety bond activities. The bond items under Agents and Agencies will be more for reporting views.

When a main menu icon is selected, the menu bar must change to link activate the necessary submenu items.

E.g. (Admin Selected):

Bond

Agents

Agencies

Admin

-Users

-Alerts

-DOI Actions

Assuming Users is the default interface and is currently available. Admin would still be highlighted as in current implementation. Clicking on **Alerts** would launch the Alerts Interface, and menu changes would change to reflex:

Admin

-Users

-Alerts

-DOI Actions

Please do not hesitate to just forward any questions or comments.

I will follow up with the other outstanding items ASAP.

Best regards.

-Solomon