QUEZONIAN EDUCATIONAL COLLEGE INC.

PRC 101 – PRACTICUM OJT

Vel Joseph Kristoffer Deseo

Melvin Mar P. Cabie

James Oliver De Guzman

(Trainee OJT)

Ms. Angela Aragon

(Adviser)

INTRODUCTION

DOCUMENT OVERVIEW

This guide describes the screen functionalities of the Endorsement transaction. It contains (1) breadcrumb information how to navigate to the screen, (2) navigation and workflow steps, (3) common controls for tracker, navigation buttons, and summary information, and (4) usage information for the basic functions of screen objects and web components, together with their corresponding definition.

SCR4104012– Endorsement – Process Endorsement Request Client

SCREEN DESCRIPTION

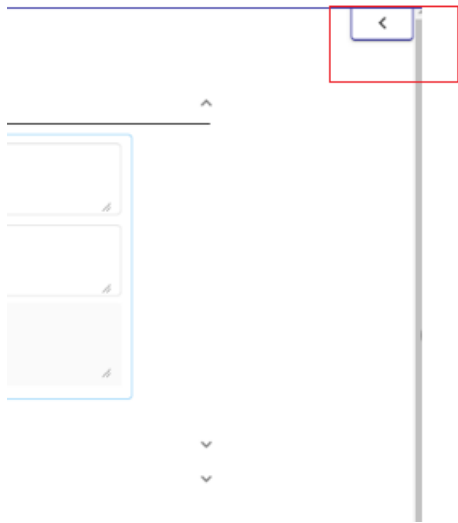| SCREEN ID	SCR4104012
SCREEN LABEL	Endorsement – Process Endorsement Request Client
CALLED FROM	Inbox
MODULE	Marketing
MENU GROUP	Transaction

Figure 1: Button for Endorsement Request Summary

This button triggers to show the Slider for Endorse Request Summary

ENDORSEMENT REQUEST SUMMARY >

Reference No
000106894-11

Endorsement Trans No
9172

Endorsement Type
Reduction in Coverage/Premium

Policy No
GLTEST21ComAdj_CRG

Policy Trans No.
48312

Assured/policy Holder
Spouse Name04076 and Name04077 Axx

Insurer/Principal
(AIPC) ASIA INSURANCE (PHILIPPINES) CORPORA

Insurance Line/Type
ACCIDENT - Group Personal Accident (GPA)

Coverage Period
01/01/2022-12/31/2022

TSI
Php 1,000,000.00

Branch
(HO) Head Office

Business Unit
(EMP) Captive Individual Client

Marketing AO
(MARY ANN)Mary Ann M. Vasallo

Processor
Mary Ann M. Vasallo

Reviewer
Sel Libunao

NEXT

Figure 2: Endorsement Request Summary Panel

Figure 3.1: Transaction Stepper (Endorsement Addition/Reduction in Coverage)

Figure 3.2: Transaction Stepper (Ammend General Info)

Figure 3.3: Transaction Stepper (Other Condition)

This is consisting of 3 Expansion Row (Endorsement Addition/Reduction in Coverage, Amend General Info, Other Condition).

NOTE: The Date Picker Input is disabled the input to avoid entering word or other invalid keywords. The Text Area Input height contains three-line words visible. All Disable forms has no outline in their forms. Input that has selection icon is disabled to select only the List-of-Data
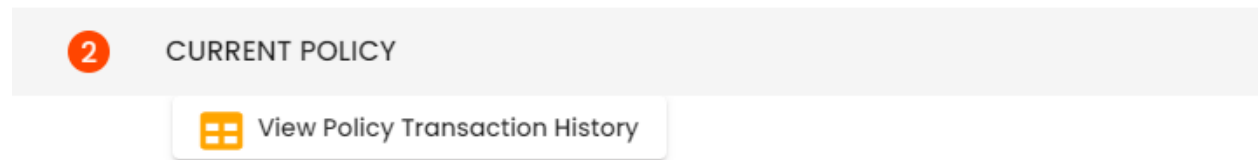

Figure 4: Current Policy (NO FUNCTION)

Figure 5: Coverage Summary Stepper and Grid (Melvin Mar Cabie)(SCR4104014)

The grid consists of following header:

- No.
- Coverage
- Coverage Description
- Net Covered Amount
- Reduced Covered Amount
- Net Premium amount
- Reduced Premium Amount
- Net Commission
- Remarks

Development of First Screen Design include "add" button allow the program to proceed "open dialog format". (Encode Reduction/Addition in Coverage)

Figure 6 – Add Row Button

Open Dialog Format

The Dialog Panel Consists of:

- Net Policy Coverage
  - Coverage
  - Coverage Description
  - Net Covered Amount
  - Net Premium Amount
  - Net Commission

- Reduction Coverage

  In this section the user is allowed to specify/encode the reduction/addition in coverage.

  - Reduced Coverage
  - Reduced Coverage Description
  - Reduced Covered Amount
  - Reduced Premium Amount
  - Reduced Commission

- Remarks
  - Remarks

Figure 7 – Open Dialog

Click the "Close" button to cancel the encoding of reduction/addition in coverage.

Click the "Confirm" button to complete the encoding of reduction/addition in coverage. The encoded coverage details will be display in the reduction coverage summary table.

Column Header

The elements in this table may vary from the dialog panel from the "add row" button

Elements Containing are:

- Action (Delete button, Edit button)

  Click the "Delete Icon" button to delete a selected row, upon clicking a Message will appear either "List Deleted Successfully" or "Error while Deleting the List".
  Click the "Edit Icon" button to open a dialog panel consists of dialog format as shown in Figure 7. Upon clicking the data entries of each data is being gathered and displayed from the input for specify/edit a value, clicking "Update" button a Message will appear "List Updated Successfully" if not no changes will appear on the update edit clicking "Cancel" button to cancel the update of reduction/addition in coverage.

Figure 8 – Update Dialog

Figure 9: Credit Memo Stepper and Credit Memo Summary Expansion Row

Credit Memo consist of three expansion row(Credit Memo Summary, Apply Coverage Reduction(James Oliver De Guzman 1st Screen), Apply Reduction Summary(Vel Joseph Deseo 1st Screen))

Figure 10: Apply Coverage Reduction Expansion Row(James Oliver De Guzman) (SCR4104015)

Elements containing are:

• Action (Delete Button, Edit Button)

• No.

• Coverage

• Coverage Description

• Covered Amount

• Endorse Covered Amount

• Net Covered Amount

- Premium Rate

- Premium Amount

- Endorse Premium Amount

- Net Premium Amount

- Commission Rate

- Commission

- Endorse Commission

- Net Commission

- Remarks

- In the Credit Memo – Apply Coverage Reduction, by clicking the "Add Row" button allow the program to display the pop-up screen to apply coverage reduction to Valid Invoices

Figure 11: Apply Coverage Reduction to Valid Invoices pop-up screen.

This show policy invoice coverage such as:

- Invoice No.

- Coverage

- Coverage Description

- Covered Amount

- Premium Amount

- Commission

- Reduced Covered Amount

- Reduced Premium Amount

- Reduced Commission

- Net Covered Amount

- Net Premium Amount

- Net Commission

- Premium Rate

- Commission Rate

Figure 12: Apply Coverage Reduction to Valid Invoices pop-up screen.

Under Reduction Coverage section, allowing user to apply reduction in coverage on a specific invoice and input remarks.

Figure 13: Apply Coverage Reduction to Valid Invoices pop-up screen (close and confirm button).

By clicking the "Close" button allow user to cancel the application of coverage reduction to valid invoices.

By clicking the "Confirm" button allow user to complete the application of coverage reduction to valid invoices. Then the encoded coverage details will be display in the coverage reduction applied valid invoices table.

Figure 14: Apply Coverage Reduction to Valid Invoices Table.

Clicking the "Delete" icon to delete a selected row, upon clicking a message will appear either "List Deleted Successfully" or "Error While Deleting the List".

Clicking the "Edit" icon to display the pop-up screen.

Figure 15: Apply Coverage Reduction to Valid Invoices (Update Screen).

Clicking the "Cancel" button to cancel the application of coverage reduction to valid invoices.

Clicking the "Updated" button to update the application of coverage reduction to valid invoices. Then the encoded coverage details will be display in the coverage reduction applied valid invoices table, upon clicking the "UPDATE BUTTON" a message will appear "List Update Successfully" if not "N/A".

Figure 16: Apply Coverage Reduction to Valid Invoices Cancel and Update Button

Figure 17: Apply Reduction Summary (Vel Joseph Deseo) (SCR4104016)

This grid columns contains of the ff:

- No.
- Invoice No
- Document Stamp
- Document Tax

- FST
- LGT
- Billing VAT
- Other Charges

Open Dialog Format

The Dialog Panel Consists of:

- Policy Invoice Coverage (DISPLAY ONLY)
    - Invoice No.
    - Valid Document Stamp
    - Valid Premium Tax
    - Valid FST
    - Valid LGT
    - Valid Billing VAT
    - Valid Other Charges

- Reduction Summary

    In this section the user is allowed to specify/encode the reduction/addition in coverage.

    - Invoice No.
    - Document Stamp
    - Premium Tax
    - FST
    - LGT
    - Billing VAT
    - Other Charges

Figure 18 – Open Dialog

Click the "Close" button to cancel the encoding of reduction/addition in coverage.

Click the "Save" button to complete the encoding of reduction/addition in coverage. The encoded coverage details will be display in the reduction coverage summary table.

Column Header

The elements in this table may vary from the dialog panel from the "add row" button

Elements Containing are:

- Action (Delete button, Edit button)

    Click the "Delete Icon" button to delete a selected row, upon clicking a Message will appear either "List Deleted Successfully" or "Error while Deleting the List".

    Click the "Edit Icon" button to open a dialog panel consists of dialog format as shown in Figure 18. Upon clicking the data entries of each data is being gathered and displayed from the input for specify/edit a value, clicking "Update" button a Message will appear "List Updated Successfully" if not no changes will appear on the update edit clicking "Cancel" button to cancel the update of reduction/addition in coverage.

Figure 19 – Update Dialog

Figure 20 – Request for Documentation Stepper (EMPTY)

Figure 21 – Attachment Stepper (EMPTY)

Figure 22 – Endorsement Summary Stepper (EMPTY)

Figure 23 – Buttons in Lower part of Stepper

The Previous Button will previous the Stepper

The Next Button will next the Stepper

The Save Button allows to save the page (NOT WORKING)

The Close Button allows to close the page (NOT WORKING)

The Remarks Input, Remarks Input, and complete Button will show in the last Stepper