

1 Functional Specification - INQUIRY NEW

1 Search Screen 1060

Click CRM - INQUIRY - INQUIRY NEW button from the Menu. This will take to INQUIRY\_NEW screen's list page

Fetch all the data of below table fields from INQUIRY table for ISDELETED value = 0 , STATUS\_ID=01 and 02 and display below fields in the list page

List

|  |  |  |  |  |
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|  | **UI Labels** | **Table Fields** | **Remarks** |  |
|  | Inquiry Number | INQ\_NO | List Field |  |
|  | Inquiry Date | INQ\_DATE | List Field |  |
|  | Inquiry Mode | INQ\_MODE\_ID/INQ\_MODE\_TEXT | Pass INQ\_MODE\_ID in INQUIRYMODE table and fetch INQ\_MODE\_TEXT. Display both the values |  |
|  | First Name | FIRST\_NM | List Field |  |
|  | Last Name | LAST\_NM | List Field |  |
|  | Email ID | EMAIL\_ID | List Field |  |
|  | Phone | CONT\_NO | List Field |  |
|  | Notes | INQ\_NOTE\_NO | List Field |  |
|  | Status | STATUS\_ID/STATUS\_TEXT | Pass STATUS\_ID in STATUSID table and fetch STATUS\_TEXT. Display both values |  |

Note: Search field values can be multiple

On clicking Search, Pass the search field values Fetch the records from INQUIRY table for ISDELETED value=0, STATUS\_ID=01 and 02 and display in the list page

 

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|  | After Entering the values in the screen and on clicking SAVE | | | |
|  | Fetch the above values from the screen and insert into INQUIRY table along with below fields | | | |
|  | CTD\_BY - logged in USR\_ID | |  |  |
|  | CTD\_ON - Server time | |  |  |
|  | ISDELETED = 0 |  |  |  |
|  | **DB Validations** |  |  |  |
|  | Validate data types |  |  |  |
|  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/INQ\_NO - Primary Keys | | | |
|  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/STATUS\_ID/FIRST\_NM - Not Null fields | | | |
|  | Validate CTD\_ON field value in the table INQUIRY for the duplicate records before insertion | | | |
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| Messages |  | | | | | |  |  |  |
| MessageID table |  | | | | | |  |  |  |
| During Save, based on the validation result fetch the MESSAGE\_TEXT from MESSAGEID table and display in the UI | | | | | |
| Validation | | MESSAGE\_ID | LANG\_ID | MESSAGE\_TYP | MESSAGE\_TEXT |
| New record | | 0138 | EN | S | Inquiry Number "INQ\_NO" created successfully |
| Record already exists | | 0139 | EN | E | Inquir Number"INQ\_NO" already exists |





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|  | **DB Validations** |  |  | | |  | |
|  | Validate data types |  |  | | |  | |
|  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/INQ\_NO - Primary Keys | | | | | | |
|  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/STATUS\_ID/FIRST\_NM - Not Null fields | | | | | | |
|  | Validate CTD\_ON field value in the table INQUIRY for the duplicate records before insertion | | | | | | |
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| 3 | **In- App Notifications** | | |  |  | |  | |  |  |  |  |
|  | Once the record is saved successfully, pass CLASS\_ID=3, TRANS\_ID =01, NOT\_ID=01 in NOTIFICATION table and  fetch NOT\_TEXT and USR\_ID values. Send NOT\_TEXT to the selected USR\_ID login as Notficiations | | | | | | | | | | |  |
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| 4 | **SMS Notifications (MOZEO integration)** | | |  |  | |  | |  |  |  |  |
|  | Once the record is saved successfully in INQUIRY table, fethc CONT\_NO value and send SMS through  MOZEO with Message " Thanks for Inquiring us, Our Legal team will contact you shortly - Team M&R LLP" | | | | | | | | | | |  |
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| 5 | **Update** | | |  |  | |  | |  |  |  |  |
|  | Select a row from the list page and click Edit icon, pass the selected INQ\_NO field in INQUIRY table and  fetch below fields | | | | | | | |  |  |  |  |

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| **UI Labels** | **Table Fields** | **Remarks** | **Logic** |
| Inquiry No | INQ\_NO | Autopopulate/Non Editable |  |
| Inquiry Date | INQ\_DATE | Autopopulate/Non Editable |  |
| Inquiry Mode | INQ\_MODE\_ID | Autopopulate/Editable |  |
| First Name | FIRST\_NM | Autopopulate/Editable |  |
| Last Name | LAST\_NM | Autopopulate/Editable |  |
| Email ID | EMAIL\_ID | Autopopulate/Editable |  |
| Phone | CONT\_NO | Autopopulate/Editable |  |
| Notes | INQ\_NOTE\_NO | Autopopulate/Editable | During update, pass the entered values along with INQ\_NOTE\_NO as NOTE\_NO in NOTES table and update the record |
| Created by | CTD\_BY | Autopopulate/Non Editable |  |
| Created On | CTD\_ON | Autopopulate/Non Editable |  |

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|  | Click Update after making changes in INQUIRY update screen | | | |
|  | **Update table** |  |  |  |
|  | Fetch the above values from selection screen and update into INQUIRY table along with below fields | | | |
|  | UTD\_BY - logged in USR\_ID | |  |  |
|  | UTD\_ON - Server time | |  |  |
|  | STATUS\_ID - Hardcoded value "2" | |  |  |

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|  | **DB Validations** |  |  |  |
|  | Validate data types |  |  |  |
|  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/INQ\_NO - Primary Keys | | | |
|  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/STATUS\_ID/FIRST\_NM - Not Null fields | | | |



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| After Successful update , inesrt records in AUDITLOG table as below | | | | | | | |
| **Table Fields** | | **Logic** | | | | **Remarks** |  |
| LANG\_ID | | Pass logged in USR\_ID in USERPROFILE table and fetch corresponding LANG\_ID and insert | | | |  |  |
| CLASS\_ID | | Insert a Value '03 | | | |  |  |
| AUD\_LOG\_NO | | During Save, Pass CLASS\_ID=03, NUM\_RAN\_CODE=03 in NUMBERRANGE table and Fetch NUM\_RAN\_CURRENT values and add +1 and then insert | | | |  |  |
| TRANS\_ID | | Insert a Value '01 | | | |  |  |
| TRANS\_NO | | INQ\_NO | | | |  |  |
| TABLE\_NM | | INQUIRY | | | |  |  |
| MOD\_FIELD | | Updated Field name | | | | Insert multiple records if multiple fields are updated |  |
| OLD\_VL | | Field value before update | | | |  |  |
| NEW\_VL | | Field value after update | | | |  |  |
| UTD\_BY | | Logged in USR\_ID | | | |  |  |
| UTD\_ON | | Server time | | | |  |  |
|  |  | |  |  |  | | | |  |  |
| 2 | **Functional Specification - INQUIRY ASSIGN** | | |  |  | | | |  |  |
|  |  | |  |  |  | | | |  |  |
| 1 | **Search** | | **Screen 1062** |  |  | | | |  |  |
|  | **Click CRM - INQUIRY - INQUIRY ASSIGN button from the Menu. This will take to INQUIRY\_ASSIGN screen's list page** | | | | | | | | |  |
|  | Fetch all the data of below table fields from INQUIRY table for ISDELETED value = 0,  STATUS\_ID=01,02,03,04 and display below fields in the list page | | | | | | | | | |

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|  | **List** |  |  |  |  |  |
|  | **UI Labels** | **Table Fields** | **Remarks** |  |  |  |
|  | Class | CLASS\_ID/CLASS | List Field |  |  |  |
|  | Inquiry Number | INQ\_NO | List Field |  |  |  |
|  | Inquiry Date | INQ\_DATE | List Field |  |  |  |
|  | Inquiry Mode | INQ\_MODE\_ID/INQ\_MODE\_TEXT | Pass INQ\_MODE\_ID in INQUIRYMODE table and fetch INQ\_MODE\_TEXT. Display both the values |  |  |  |
|  | First Name | FIRST\_NM | List Field |  |  |  |
|  | Last Name | LAST\_NM | List Field |  |  |  |
|  | Email ID | EMAIL\_ID | List Field |  |  |  |
|  | Phone | CONT\_NO | List Field |  |  |  |
|  | Notes | NOTE\_NO | List Field |  |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT | Pass STATUS\_ID in STATUSID table and fetch STATUS\_TEXT. Display both values |  |  |  |
|  | Assigned To | ASSIGNED\_USR\_ID | List Field |  |  |  |
|  | Assigned On | ASSIGN\_ON | List Field |  |  |  |
|  | List page can be filtered based on search parameters entered in below search fields | | | |  |  |

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| --- | --- | --- | --- | --- | --- |
| **Search** |  | |  | | |
| **UI Labels** | **Table Fields** | | **Remarks** | | |
| Class | CLASS\_ID/CLASS | | Search Field | | |
| Inquiry Number | INQ\_NO | | Search Field | | |
| Inquiry Date | INQ\_DATE | | Fetch the records between the date range | | |
| Inquiry Mode | INQ\_MODE\_ID/INQ\_MODE\_TEXT | | Search Field | | |
| First Name | FIRST\_NM | | Search Field | | |
| Last Name | LAST\_NM | | Search Field | | |
| Email ID | EMAIL\_ID | | search field | | |
| Phone | CONT\_NO | | search field | | |
| Assigned To | ASSIGNED\_USR\_ID | | search field | | |
| Assigned On | ASSIGN\_ON | | Fetch the records between the date range | | |
| Status | STATUS\_ID/STATUS\_TEXT | | Hard coded values 1,2,3 and 4 | | |
| **Note: Search field values can be multiple** | | | | |  | |  |
| On clicking Search, Pass the search field values Fetch the records from INQUIRY table for ISDELETED value=0,  STATUS\_ID=01,02,03,04 and display in the list page | | | | | | | |
| **INQUIRY ASSIGN** | | **Screen 1063** | |  |  | |  |
| On selecting an entry from the list page and click Assign button | | | | |  | |  |
| Validation | |  | |  |  | |  |
| Pass the selected INQ\_NO in INQUIRY table and validate STATUS\_ID=1,2 if yes then Open INQUIRY ASSIGN Screen with below fields | | | | | | | |
| Else, error message " EN 0142 E Inquiry assignment is not possible as it is already assigned" | | | | | | |  |



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| Click Assign after making changes in INQUIRY ASSIGN screen | | | | | |  | | |
| **Update table** |  | |  | | | |  |  |
| Fetch the above values from selection screen , Pass INQ\_NO in INQUIRY table and update the record along with below fields | | | | | | | | |
| ASSIGN\_BY - logged in USR\_ID | | |  | | | |  |  |
| ASSIGN\_ON - Server time | | |  | | | |  |  |
| **DB Validations** |  | |  | | | |  |  |
| Validate data types |  | |  | | | |  |  |
| LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/INQ\_NO/CLASS\_ID - Primary Keys | | | | | |  | | |
| LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/STATUS\_ID/FIRST\_NM/CLASS\_ID/ASSIGNED\_USR\_ID - Not Null fields | | | | | | | | |
| **Messages** |  | |  | | | |  |  |
| MESSAGEID table |  | |  | | | |  |  |
| Validation | | MESSAGE\_ID | | LANG\_ID | MESSAGE\_TYP | MESSAGE\_TEXT | | |
| Valid record | | 0143 | | EN | S | Innquiry Number "INQ\_NO" Assigned successfully | | |

3 In- App Notifications

Once the record is assigned successfully, Fetch CLASS\_ID from INQUIRY table and pass the selected CLASS\_ID, TRANS\_ID =01, NOT\_ID=02 in NOTIFICATIONID table and fetch NOT\_TEXT and USR\_ID values. Send NOT\_TEXT to the selected USR\_ID login as Notficiations

4 Update

Select a row from the list page and click Edit icon, below validation to be done

Validation

pass the selected INQ\_NO field in INQUIRY table and fetch validate STATUS\_ID=3,4. if yes then allow to edit below fields in INQUIRY UPDATE screen

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| Else, Error Message "**EN E 0144 Inquiry Can't be updated as this is not assigned"** | | | |
| **UI Labels** | **Table Fields** | **Remarks** | **Logic** |
| Inquiry No | INQ\_NO | Non Editable |  |
| Inquiry Date | INQ\_DATE | Non Editable |  |
| Inquiry Mode | INQ\_MODE\_ID | Non Editable |  |
| First Name | FIRST\_NM | Non Editable |  |
| Last Name | LAST\_NM | Non Editable |  |
| Email ID | EMAIL\_ID | Non Editable |  |
| Phone | CONT\_NO | Non Editable |  |
| Notes | INQ\_NOTE\_NO | Editable | During update, pass the INQ\_NOTE\_NO as NOTE\_NO in NOTES table and update NOTE\_TEXT with entered values |
| Class | CLASS\_ID | Editable |  |
| Assigned To | ASSIGNED\_USR\_ID | Editable |  |
| Assinged by | ASSIGN\_BY | Non Editable |  |
| Assigned On | ASSIGN\_ON | Non Editable |  |
| Click Update after making changes in INQUIRY ASSIGN screen   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | **Update table** |  |  |  |  | |  | Fetch the above values from selection screen and update into INQUIRY table along with below fields | | | |  | |  | STATUS\_ID - Hard Coded value "4" | |  |  |  | |  | **DB Validations** |  |  |  |  | |  | Validate data types |  |  |  |  | |  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/INQ\_NO/CLASS\_ID - Primary Keys | | | |  | |  | LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/STATUS\_ID/FIRST\_NM/CLASS\_ID/ASSIGNED\_USR\_ID - Not Null fields | | | | | |  | **Messages** |  |  |  |  | |  | MESSAGEID table |  |  |  |  | |  | Validation | MESSAGE\_ID | LANG\_ID | MESSAGE\_TYP | MESSAGE\_TEXT | |  | Valid record | 0145 | EN | S | Inquiry Number "INQ\_NO" updated successfully | | | | |

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| After Successful update , inesrt records in AUDITLOG table as below | | |
| **Table Fields** | **Logic** | **Remarks** |
| LANG\_ID | Pass logged in USR\_ID in USERPROFILE table and fetch corresponding LANG\_ID and insert |  |
| CLASS\_ID | CLASS\_ID from INQUIRY table |  |
| AUD\_LOG\_NO | During Save, Pass CLASS\_ID=03, NUM\_RAN\_CODE=03 in NUMBERRANGE table and Fetch NUM\_RAN\_CURRENT values and add +1 and then insert |  |
| TRANS\_ID | Insert a Value '01 |  |
| TRANS\_NO | INQ\_NO |  |
| TABLE\_NM | INQUIRY |  |
| MOD\_FIELD | Updated Field name | Insert multiple records if multiple fields are updated |
| OLD\_VL | Field value before update |  |
| NEW\_VL | Field value after update |  |
| UTD\_BY | Logged in USR\_ID |  |
| UTD\_ON | Server time |  |

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| 3 | **Functional Specification - INQUIRY VALIDATION** | |  |  |  |  |
| 1 | **Dashboard - Inquiry** |  |  |  |  |  |
|  | **Table - INQUIRY** |  |  |  |  |  |
|  | 1. ISDELETED value = 0, | |  |  |  |  |
|  | 2. STATUS\_ID=3,4 |  |  |  |  |  |
|  | 3. Fetch CLASS\_ID values from USERPROFILE by passing Logged in USR\_ID then pass the fetched CLASS\_ID  value in INQUIRY table and fetch the Count of INQ\_NO and display in the dashboard | | | | | |
|  | **Note : If CLASS\_ID =03 for the passed USR\_ID, fetch all CLASS\_ID values from Inquiry table** | | |  |  |  |
|  |  |  |  |  |  |  |
|  | **Dashboard - Intake** |  |  |  |  |  |
|  | **Table - PCINTAKEFORM** | |  |  |  |  |
|  | 1. ISDELETED value = 0, | |  |  |  |  |
|  | 2. STATUS\_ID=7,8,9 |  |  |  |  |  |
|  | 3. Fetch CLASS\_ID values from USERPROFILE by passing Logged in USR\_ID then pass the fetched CLASS\_ID  value in PCINTAKEFORM table and fetch the Count of INQ\_NO and display in the dashboard | | | | | |
|  | **Note : If CLASS\_ID =03 for the passed USR\_ID, fetch all CLASS\_ID values from PCINTAKEFORM table** | | |  |  |  |
|  |  |  |  |  |  |  |
|  | **Dashboard - Prospective Client** |  |  |  |  |  |
|  | **Table - POTENTIALCLIENT** | |  |  |  |  |
|  | 1. ISDELETED value = 0, | |  |  |  |  |
|  | 2. STATUS\_ID=11,12,13,14 | |  |  |  |  |
|  | 3. Fetch CLASS\_ID values from USERPROFILE by passing Logged in USR\_ID then pass the fetched CLASS\_ID  value in POTENTIALCLIENT table and fetch the Count of POT\_CLIENT\_ID and display in the dashboard | | | | | |
|  | **Note : If CLASS\_ID =03 for the passed USR\_ID, fetch all CLASS\_ID values from POTENTIALCLIENT table** | | |  |  |  |
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|  | **Dashboard - Agreement** |  |  |  |  |  |



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| Click Update after making changes in INQUIRY VALIDATION screen | | |  |  |
| **Update table** |  |  |  |  |
| Fetch the above values from selection screen and update into INQUIRY table along with below fields | | | |  |
| **DB Validations** |  |  |  |  |
| Validate data types |  |  |  |  |
| LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/INQ\_NO/CLASS\_ID - Primary Keys | | | |  |
| LANG\_ID/EMAIL\_ID/CONT\_NO/INQ\_MODE\_ID/STATUS\_ID/FIRST\_NM/CLASS\_ID/ASSIGNED\_USR\_ID - Not Null fields | | | |  |



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| --- | --- | --- |
| After Successful update , inesrt records in AUDITLOG table as below | | |
| **Table Fields** | **Logic** | **Remarks** |
| LANG\_ID | Pass logged in USR\_ID in USERPROFILE table and fetch corresponding LANG\_ID and insert |  |
| CLASS\_ID | CLASS\_ID from INQUIRY table |  |
| AUD\_LOG\_NO | During Save, Pass CLASS\_ID=03, NUM\_RAN\_CODE=03 in NUMBERRANGE table and Fetch NUM\_RAN\_CURRENT values and add +1 and then insert |  |
| TRANS\_ID | Insert a Value '01 |  |
| TRANS\_NO | INQ\_NO |  |
| TABLE\_NM | INQUIRY |  |
| MOD\_FIELD | Updated Field name | Insert multiple records if multiple fields are updated |
| OLD\_VL | Field value before update |  |
| NEW\_VL | Field value after update |  |
| UTD\_BY | Logged in USR\_ID |  |
| UTD\_ON | Server time |  |

4 Delete

On selecting an entry from the list page and click Delete button

Validation

Pass the selected INQ\_NO in INQUIRY table and validate STATUS\_ID=03,04,05,06, if yes then update ISDELETED value from 0 to 1 for the selected INQ\_NO and flag field "REF\_FIELD\_10"

Else, error message " EN 0148 E Inquiry deletion is not possible as intake form is already sent to the client"

Messages

MESSAGEID table

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| MESSAGEID table |  |  |  |  |
| Validation | MESSAGE\_ID | LANG\_ID | MESSAGE\_TYP | MESSAGE\_TEXT |
| Valid record | 0149 | EN | S | Inquiry Number "INQ\_NO" deleted successfully |
|  |  |  |  |  |

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| 1 | Inquiry Search |  |  |  |
|  |  |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Inquiry Number | INQ\_NO |  |  |
|  | Inquiry Date | INQ\_DATE | Date Ranges | |
|  | Inquiry Mode | INQ\_MODE\_ID/INQ\_MODE\_TEXT |  |  |
|  | First Name | FIRST\_NM |  |  |
|  | Last Name | LAST\_NM |  |  |
|  | Email ID | EMAIL\_ID |  |  |
|  | Phone | CONT\_NO |  |  |
|  | Class | CLASS\_ID/CLASS |  |  |
|  | Assigned To | ASSIGNED\_USR\_ID |  |  |
|  | Assigned On | ASSIGN\_ON |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
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| 2 | Intake |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Inquiry Number | INQ\_NO |  |  |
|  | Intake form No | IT\_FORM\_NO |  |  |
|  | Intake Form ID | IT\_FORM\_ID/IT\_FORM\_TEXT |  |  |
|  | Email ID | EMAIL\_ID |  |  |
|  | Sent/Filled date | SENT\_ON | Date Ranges | |
|  | Received date | RECEIVED\_ON | Date Ranges | |
|  | Approved date | APPROVED\_ON | Date Ranges | |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  |  |  |  |  |
| 3 | Potential Client |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Prospective Client | POT\_CLIENT\_ID |  |  |
|  | Inquiry | INQ\_NO |  |  |
|  | Intake Form | IT\_FORM\_ID/IT\_FORM\_TEXT |  |  |
|  | NAME | FIRST\_LAST\_NM |  |  |
|  | Email ID | EMAIL\_ID |  |  |
|  | Phone | CONT\_NO |  |  |
|  | Created Date | CTD\_ON | Date Ranges | |
|  | Created by | CTD\_BY |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  |  |  |  |  |
| 4 | Agreement |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Agreement | AGREEMENT\_CODE/AGREEMENT\_TEXT |  |  |
|  | Prospective Client | POT\_CLIENT\_ID |  |  |
|  | Inquiry | INQ\_NO |  |  |
|  | Case Category | CASE\_CATEGORY\_ID/CASE\_CATEGORY |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  | Sent date | SENT\_ON | Date Ranges | |
|  | Received date | RECEIVED\_ON | Date Ranges | |
|  | Resent date | RESENT\_ON | Date Ranges | |
|  | Validated date | APPROVED\_ON | Date Ranges | |
|  |  |  |  |  |

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| 5 | Client General |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Client ID | CLIENT\_ID |  |  |
|  | Name | FIRST\_LAST\_NM |  |  |
|  | Email ID | EMAIL\_ID |  |  |
|  | Cell | CONT\_NO |  |  |
|  | Intake Form | IT\_FORM\_NO |  |  |
|  | Created Date | CTD\_ON |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  |  |  |  |  |
| 6 | Client - Notes |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Note Number | NOTE\_NO |  |  |
|  | Type | NOTE\_TYP\_ID/NOTE\_TYP\_TEXT |  |  |
|  | Case No | MATTER\_NO |  |  |
|  | Created Date | CTD\_ON |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  |  |  |  |  |
| 7 | Client - Matters |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Case Number | MATTER\_NO |  |  |
|  | Category | CASE\_CATEGORY\_ID/CASE\_CATEGORY |  |  |
|  | Sub Category | CASE\_SUB\_CATEGORY\_ID/CASE\_SUB\_CATEGORY |  |  |
|  | Responsible Attorney | RESPONSIBLE\_TK/TK\_NAME |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  | Opened by | CTD\_BY |  |  |
|  | Opened on | CASE\_OPEN\_DATE |  |  |
|  | Closed on | CASE\_CLOSED\_DATE |  |  |
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| 8 | Client - Documents | |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Number | DOC\_NO |  |  |
|  | Sent by | SENT\_BY |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  | Case No | MATTER\_NO |  |  |
|  | Sent date | SENT\_ON |  |  |
|  | Received date | RECEIVED\_ON |  |  |
|  |  |  |  |  |
| 9 | **L&E Case Info** |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Client ID | CLIENT\_ID |  |  |
|  | Name | FIRST\_LAST\_NM |  |  |
|  | Case Info No | CASEINFO\_NO |  |  |
|  | Case No | MATTER\_NO |  |  |
|  | Created by | CTD\_BY |  |  |
|  | Created Date | CTD\_ON |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  |  |  |  |  |
| 10 | **IMM Case Info** |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Client ID | CLIENT\_ID |  |  |
|  | Name | FIRST\_LAST\_NM |  |  |
|  | Case Info No | CASEINFO\_NO |  |  |
|  | Case No | MATTER\_NO |  |  |
|  | Created by | CTD\_BY |  |  |
|  | Created Date | CTD\_ON |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
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| 11 | Matter - General |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Matter No | MATTER\_NO |  |  |
|  | Description | MATTER\_TEXT |  |  |
|  | Client Name | CLIENT\_ID |  |  |
|  | Case Information No | CASEINFO\_NO |  |  |
|  | Case Category | CASE\_CATEGORY |  |  |
|  | Case Opened Date | CASE\_OPEN\_DATE |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
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| 12 | Matter Notes |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Note Number | NOTE\_NO |  |  |
|  | Type | NOTE\_TYP\_ID/NOTE\_TYP\_TEXT |  |  |
|  | Created Date | CTD\_ON |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  |  |  |  |  |
| 13 | Matter - Document |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Number | DOC\_NO |  |  |
|  | Description | DOC\_TEXT |  |  |
|  | Sent by | SENT\_BY |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
|  | Sent date | SENT\_ON |  |  |
|  | Received date | RECEIVED\_ON |  |  |
|  |  |  |  |  |
| 14 | Task |  |  |  |
|  | **UI Labels** | **Table Fields** |  |  |
|  | Task No | TASK\_NO |  |  |
|  | Task type | TASK\_TYP\_CODE/TASK\_TYP\_CODE\_TEXT |  |  |
|  | Task Name | TASK\_NM |  |  |
|  | Task owner | TASK\_ASSIGN |  |  |
|  | Creation date | CTD\_ON |  |  |
|  | Deadline date | DEADLINE\_DATE |  |  |
|  | Reminder date | REMINDER\_DATE |  |  |
|  | Status | STATUS\_ID/STATUS\_TEXT |  |  |
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| 15 | Time | |  | | |  |  | |
|  | **UI Labels** | | **Table Fields** | | |  |  | |
|  | Time Ticket No | | TIME\_TICKET\_NO | | |  |  | |
|  | Bill Type | | BILL\_TYPE | | |  |  | |
|  | Time Keeper | | TK\_CODE/TK\_NAME | | |  |  | |
|  | Creation date | | CTD\_ON | | |  |  | |
|  | Status | | STATUS\_ID/STATUS\_TEXT | | |  |  | |
|  |  | |  | | |  |  | |
|  |  | |  | | |  |  | |
|  |  | |  | | |  |  | |
| **S.No** | | **Parameters** | | **Values** | **Remarks** | | | **Sample** | |
| 1 | | Tables used | | **Intake Form** |  | | |  | |
| 2 | | Fields | | **All** |  | | |  | |
| 3 | | Selection screen | |  |  | | |  | |
| 4 | | Field validations | | **Refer below FS** |  | | |  | |
| 5 | | grouping/auto populate | | **Nil** |  | | |  | |
| 6 | | DB Validations | | **Refer FS** | &Message\_typ &Message\_ID &Lang\_ID Message\_text &DOC\_NO | | | S 0148 EN Prospective Client Intake form sent successfully for Inquiry Number "INQ\_NO" | |
| 7 | | Labels(static/dynamic) | | **Property file** |  | | |  | |
| 8 | | APIs | |  |  | | |  | |

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| --- | --- | --- | --- | --- |
| 1 | **Intake Form Selection** | **Screen 1066** |  |  |
|  | Click Intake Form button from INQUIRY List page(screen 1064) and below validations to be done | | |  |
|  | Validation |  |  |  |
|  | Pass the selected INQ\_NO into the INQUIRY table below validations to be done | | |  |
|  | **Validations** |  |  |  |
|  | 1. validate STATUS\_ID=03,04 with IS\_DELETED=0 if yes then open up INTAKEFORM screen - SCREEN\_ID=1066 | | | |
|  | Else error message as below |  |  |  |
|  | If STATUS\_ID = 05, " EN E0150 Intake form can't be sent or filled for the seleceted Inquiry as this is on Hold" | | | |
|  | If STATUS\_ID = 06, " EN E0151 Intake form can't be sent or filled for the seleceted Inquiry as this is rejected" | | | |
|  | If STATUS\_ID = 07, " EN E0152 Intake form can't be sent or filled for the seleceted Inquiry as this is already sent" | | | |
|  | 2 Validate IT\_FORM\_ID is null, if yes then open up INTAKEFORM screen - SCREEN\_ID=1066 | | |  |
|  | Else error message " EN E0153 Intake form can't be sent or filled for the seleceted Inquiry  as this is already sent or filled" | | | |



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|  | After filling the details and On Clicking Send button | | |  |  |  |  |  |  |
|  | Pass the Selected IT\_FORM\_ID in INTAKFORMID table and fetch REF\_FIELD\_1 value (SCREEN ID) and  send to Email ID as hyper link and hyperlink contains IT\_FORM\_NO( This is unique number automatically generated  by the system and it starts with 3000001) | | | |  |  |  |  |  |
|  | IT\_FORM\_ID | SCREEN\_ID | Form Name |  |  |  |  |  |  |
|  | 001 | 1067 | Welcome Back Sheet English |  |  |  |  |  |  |
|  | 002 | 1068 | PC-Information Sheet English |  |  |  |  |  |  |
|  | 003 | 1069 | PC-Information Sheet Spanish |  |  |  |  |  |  |
|  | 004 | 1070 | PC-Information Sheet N-400 |  |  |  |  |  |  |
|  | 005 | 1071 | Client Information Sheet - DACA |  |  |  |  |  |  |
|  | 006 | 1072 | New Client Information Sheet - Word |  |  |  |  |  |  |
|  | **Note : Need to hide OFFICE USE tab for all SCREEN\_ID when sending them to Clients"** | | | |  |  |  |  |  |

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|  | Once the intake form is sent successfully, |  |  |  |  |  |
|  | 1. Pass the selected INQ\_NO in INQUIRY table update STATUS\_ID=07 and flag field " REF\_FIELD\_10 " | |  |  |  |  |



Once the intake form is sent as hyperlink

Insert a record in PCINTAKEFORM table as below



|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DB Validations** |  |  |  |  |
| Validate data types |  |  |  |  |
| LANG\_ID/INQ\_NO/CLASS\_ID/IT\_FORM\_ID/IT\_FORM\_NO - Primary Keys | | |  |  |
| LANG\_ID/INQ\_NO/CLASS\_ID/IT\_FORM\_ID/IT\_FORM\_NO/STATUS\_ID/SENT\_ON/CTD\_BY/CTD\_ON - Not Null fields | | | |  |
| Validate data types LANG\_ID/INQ\_NO/CLASS\_ID/IT\_FORM\_ID/IT\_FORM\_NO/IS\_DELETED=0 for  duplicate records before inserting into PICINTAKEFORM table | | | |  |
| Mongo DB |  |  |  |  |
| Also Insert a record in corresponding Mongo DB as below | | |  |  |
| Note: Primary keys and Not null fields for all the tables are same and are below | | |  |  |