

# SalesLink New Business Enhancements: Functional Requirements

Each screen should include a summary of the agent information being viewed. For example:

Agent Information			
Agent Number:	000031162	Agent Name:	HAROLD P CONNELLY

The navigation/menu (module menu) should include (order of these items still to be determined):

- Overview
- Policy Watch List
- Agent Watch List
- E-Track
- Policy Assignment
- **Downline ?**
- Search
- Reports

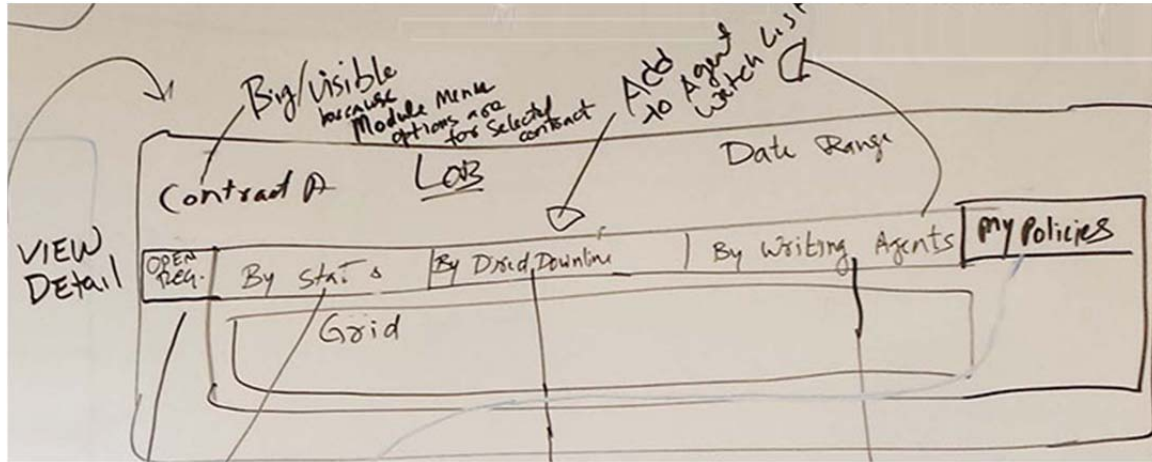
## 1. Overview Screen

Hand-drawn sketch of a software interface for an agent's overview screen. The interface includes a table with columns for 'Pending', 'Open Req', 'Contract Issues', and 'Issued'. A 'VIEW Detail' button is next to the 'Issued' column. A 'Total' row is at the bottom. Annotations include 'By Submitted', 'Agent Profile (when ready)', and 'Data Range'. Red circles and numbers 1-9 highlight specific UI elements.

	3. Pending	4. Open Req	5. Contract Issues	6. Issued	7. VIEW Detail
Contract #	3	2	4	4	
Contract BA					
Contract B	5	4	5	3	
Contract C	10	12	6	3	
Total	8. 18/Prem	9. 17/Prem			

- 1.1. Include a table or chart to graphically display the results at a glance (may be optional)
- 1.2. Ability to choose data by LOB: Annuity, Life, both
- 1.3. Ability to search by date range
- 1.4. The overview screen will include 2 grid views:  
Current Inventory and Recent Activity (will recent activity screen show the same info?)
- 1.5. Columns in each(?) view will include (will be able to filter/sort each column?)
  - 1.5.1. List of contracts:  
Each contract will be linked to the agent profile (when that functionality is ready)
  - 1.5.2. Pending:  
Number of policies that have been submitted to underwriting for pending issue. The total at the bottom of the column will open a detailed view which will include:
    - 1.5.2.1. Pending items by contract number, under each contract number. Then under each contract number: list of each policy, the writing agent, ability to add to agent watch list, each policy number will link to full policy details.

- 1.5.3. Open Requirements:
  - Number of policies submitted that have outstanding requirements. The total at the bottom of the column will open a detailed view which will include:
    - 1.5.3.1. Items with open requirements by contract number. Then under each contract number: list of each policy , the writing agent, ability to add to agent watch list, each policy number will link to full policy details.
- 1.5.4. Conditionally Issued:
  - No. of policies that have been reviewed/approved but have at least 1 missing requirement. **Will this link to additional info?**
- 1.5.5. Issued:
  - Number of policies that have been completed and issued. **Will this link to additional info?**
- 1.5.6. View Detail (see 1.6 for details)
- 1.6. **View Detail:**
  - This is the view that opens from the "View Detail" link in the last column of the Overview grid (item #7) to view detail of each contract.



The following additional views will be available.

- 1.6.1.1. Open Requirements view: this will be the default view and will include the following information:
  - 1.6.1.1.1. Policy number
    - 1.6.1.1.1.1. Policy number will open to a sub-view to reveal policies by contract
      - 1.6.1.1.1.1.1. **The following information will be included in each policy listing**
  - 1.6.1.1.2. Insured name
  - 1.6.1.1.3. Status
  - 1.6.1.1.4. Open Requirements Description
  - 1.6.1.1.5. Order Date
  - 1.6.1.1.6. Received Date
  - 1.6.1.1.7. Writing Agent Name
  - 1.6.1.1.8. Writing Agent Number
- 1.6.1.2. Status view
  - 1.6.1.2.1. Pending Policies. Each policy listed will include the following information:
    - 1.6.1.2.1.1. Insured name
    - 1.6.1.2.1.2. Writing agent name
    - 1.6.1.2.1.3. Writing agent number
    - 1.6.1.2.1.4. Product name
  - 1.6.1.2.2. Conditionally Issued policies. Each policy listed will include the following information:
    - 1.6.1.2.2.1. Insured name
    - 1.6.1.2.2.2. Writing agent name
    - 1.6.1.2.2.3. Writing agent number
    - 1.6.1.2.2.4. Product name
  - 1.6.1.2.3. Issued Policies. Each policy listed will include the following information:
    - 1.6.1.2.3.1. Insured name
    - 1.6.1.2.3.2. Writing agent name
    - 1.6.1.2.3.3. Writing agent number
    - 1.6.1.2.3.4. Product name
- 1.6.1.3. Direct Downline view will list writing agents in the downline and include the following information:
  - 1.6.1.3.1. Name of each writing agent in the downline
  - 1.6.1.3.2. Agent number of each agent in the downline
  - 1.6.1.3.3. The total number of premiums submitted by each writing agent **(i.e. 10/Premiums)**
  - 1.6.1.3.4. List of that agent's policies
  - 1.6.1.3.5. **Each policy listed will include policy number, status, open requirements, face amount, plan type (per current SalesLink)**
    - 1.6.1.3.5.1. **Each policy number will link to additional information: the policy detail view (item 1.4.1.5)**

- 1.6.1.3.6. Ability to add each downline agent to watch list
- 1.6.1.3.7. Ability to search the Direct Downline view
- 1.6.1.4. Writing Agents view
  - 1.6.1.4.1. List of all writing agents by name
  - 1.6.1.4.2. The writing agent's number
  - 1.6.1.4.3. The total number of premiums submitted by each writing agent (i.e. 10/Premiums)
  - 1.6.1.4.4. For each policy: the name of the primary insured, policy number, status, product, number of open requirements, face amount, plan type
  - 1.6.1.4.5. Ability to add writing agent to watch list
- 1.6.1.5. My Policies view
  - 1.6.1.5.1. No info available
- 1.7. Policy Watch List
- 1.8. Agent Watch List
- 1.9. E-Track
- 1.10. Recent Activity