

## Iteration 2 Wireframe Set

This diagram shows the archetypical user scenario and most likely workflow for Iteration 2.

### Assumptions

User has already gone to the signon page (UC 146) and has authenticated to the home page (UC 145).

See "Iteration 1" Wireframe Set for UC 145 and 146.

### User: Multiple Types



- 1) User adds an account. Note that most accounts are actually added during the underwriting process.
- 2) User searches for and modifies an account.

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UC 146 User logs in

The user logs in and gets here through various links: the likeliest routes are through the Accounts main nav bar or quicklinks on the Home page.

1

UC 36 Create Account

Form fields include: Account Name, Account Address, Account City, Account State, Account Zip, Account Web Address, Account Contact Name, Account Contact Phone Number, Account Phone Number, Denomination, and Account Grading.

UC 37 Check Duplicate Account

Criteria Entered: Account Name, Street Address, City, State, Zip, Phone. Shows a table of possible duplicates.

Account Name	Street Address	City	State	Zip	Phone
First Baptist Church	123 Oakridge Road	Warsaw	IN	54321	260-555-1313

The following Accounts may be possible duplicates. More text information here with explanation...???

Account Name	Street Address	City	State	Zip	Phone
First Baptist Church of Warsaw	123 Oakridge Road	Warsaw	IN	12345-1234	260-555-1212

resolve duplicates?

User goes to the Add Account workspace.

System automatically enforces this step.

2

UC 50 Search Account

Search criteria: Name, Address, City, State, Zip Code, Telephone#, Agency, Agency Code. Search Options: Search Current Data, Search Current & Historical Data, Display First 50 Results, Return All Results.

UC 99 Display Search Results

if account not found, go to Add

Account #	Account Name	Account City	Account State	Account Status
12346	First Baptist Church	Decatur	IN	Active
63521	First Church of the Nazarene	Fort Wayne	IN	Inactive
12492	First Missionary Church	Fort Wayne	IN	Active

Might be on same page as Search.

UC 51 Maintain Account

Account Number: 45762. Fields include: Policy Number, Account Number, Account Name, Account Web Address, Account Phone Number, Account Grading, Account Details, Addresses, Address Description, Usage, Address, City, State, Zip.

Two workspaces: edit account information and manage addresses.

User enters account name, number, or other search criteria.