

# **Business Rule Configuration Part 1**

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# 1. ActivityResultScreen

## Description

This Business Rule allows configuration of the ActivityResultsScreen and defines how to display Activity Results.

Element\Tag	Attribute\Definition\Value\Data Type
<ActivitySummary> </ActivitySummary>	Required parent element indicates the opening and closing of the Activity Result Screen business rule.
<FundDisplay>	
<DisplayChildFunds>	Whether or not to display child funds
	Yes
	No

# 2. ActivitySummary Screen

## Description

The ActivitySummary business rule drives the Activity Summary Screen. This rule provides the summary screen combined with summary groups including math calculations, Allocation changes and Activity results. This Business rule is also used to display a combo box containing transaction names on the Activity Summary Screen. The user can add and Quote these transactions from the ActivitySummary screen directly.

**Note:** This Business rule should be attached to the Transaction but not placed in the TransactionBusinessRulePocket.

## ActivitySummary Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<ActivitySummary> </ActivitySummary>	Required parent element indicates the opening and closing of the Activity Summary Screen business rule.
<Transactions>	Indicates the start of the transaction section displayed on the screen that contains a combo box and a button that will enable the user to create a new activity. This is required.
	ACTIVITYLEVEL
	Quote/ Active/ All
	Indicates the status of activity and must be in for this section to be displayed on the screen. If the value is not specified, Transaction is available for all states.
<Transaction>	Defines the transactions that can be created from the Activity Summary screen. This element allows you to place a combo box containing transaction names on the screen. You may then Add or possibly Quote these transactions directly from the ActivitySummary screen.

	NAME	Transaction Name	Defines the name field values of the transaction to be created.
	AUTOPROCESS	Yes	Indicates the transaction is auto processed.
		No	Indicates the transaction is NOT auto processed.
<Fields>	Start of the section listing transaction fields. These fields will be displayed on the Activity Detail screen when the transaction is selected from the dropdown box.		
<Field>	Opening tag for activity field definition block.		
<From>	Defines the field value passed from the math variable defined in the original transaction or literal elements.		
		Mathvariable	Name of any math variable defined in the transaction.
		Field	Name of the field defined in the original transaction.
<To>	Defines the name of the Activity field to which the value will be passed from <From> element value.		
		Activity field name.	
<DataType>	DataType of the Activity field.		
		DataType	Datatype of the Activity field.
<MathAndFields>	Indicates the start of field definition and values applying to math calculation. If the MathAndFields element is present in the business rule, the first link will have the text "Math/Fields." Within this section user can identify math variables or activity fields that are to be displayed together as a summary of input or calculated values for the business event. Upon clicking the "Math/Fields" link, all math variables and activity fields specified will be displayed in that section.		
<Field>	Defines the field on Activity Summary Screen for math calculation.		
<Name>	Defines the name of the MathVariable or Activity field that will be displayed.		
		Mathvariable	Name of the Mathvariable defined in the Transaction.
		Field	Activity field name.
<Display>	Defines the display name of the Mathvariable/Field.		
		Display name of the Mathvariable/Field.	
<DataType>	DataType of the Mathvariable/Field		
		DataType of the Mathvariable/Field.	
<Group>	Name of the group that should be used to obtain the value.		
		Mathvariable	
		Activity field	
<DefaultAllocationChanges>	Indicates the Allocation changes if this activity caused the policy default allocations to be updated. If the AllocationChanges element is present in the business rule and is set to "Yes," the link will have the text "Allocation Changes." Upon clicking this link, if the processing of this activity caused the policy default allocations to be updated (the WriteDefaultAllocations business		



	rule is attached to the transaction), the table (Allocation Changes table) will displayed the old and new allocations. In the transaction Xml <FundAllocation> element should be set to "Yes" and TransactionBusinessRulePacket should contain "ReassignAllocations" br.	
		Yes Indicates default allocation changes link will display. Links to default allocation changes.
		No Indicates no link will display.
<ActivityResult>	This element provides the return of data calculation and query activity. The Transaction Element document contains further information about the <ActivityResult> element and the available options. If the ActivityResult element is present in the business rule, the next link(s) will be defined by the Result sub-element "DISPLAY" attribute. Two to four Result elements can be defined in this section of the rule. The presence of the MathAndFields and DefaultAllocationChanges sections each decrease the number of available Result elements by one.	
<Result>	Returns the Factor (Element Value) from the calculation defined. This element provides the return of the calculated data.	
	DISPLAY	Display name of the link for Activity results that will be used as display of the field data on the screen.
<Table>	Controls formatting of Activity results table display.	

## ActivitySummary Screen Image - 1

The screenshot shows a web application interface for policy administration. The title bar indicates the browser is Microsoft Internet Explorer, and the address bar shows the URL 'AdminServer - IVC053001554 - DCASStart'. The main content area is titled 'Policy: IVC053001554' and contains two sections:

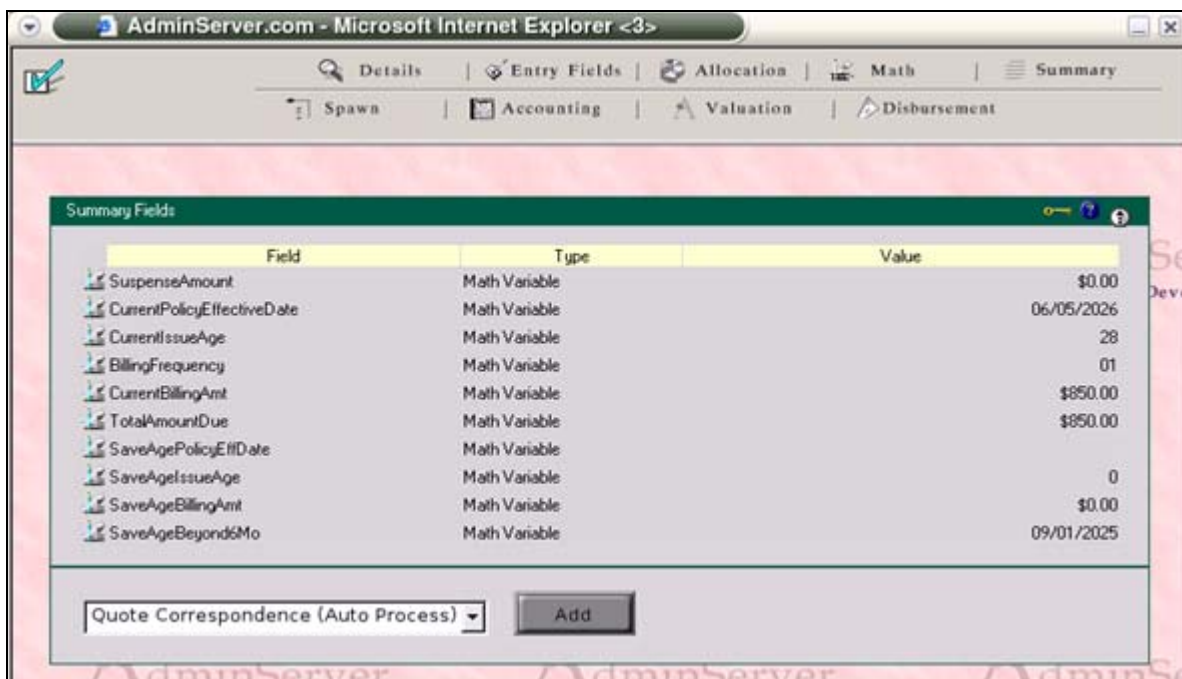
**Summary Fields**

Name	Type	Value
PolicyEffectiveDate	Math	6/15/2004
DCAFrequency	Drop Down	(12)

**Allocation Changes**

Type	Level	Fund	Value
Old	DCA Funds	AIM Basic Value Fund	\$-10000.00
Old	DCA Funds	AllianceBernstein Small/Mid-Cap Value Fund	50%
Old	DCA Funds	AllianceBernstein Value Fund	50%
New	DCA Funds	Mercury Domestic Money Market V.I. Fund	\$-8333.00
New	DCA Funds	Mercury Domestic Money Market V.I. Fund	4%

## ActivitySummary Screen Image - 2



## XML Example

```
<ActivitySummary>
  <Transactions ACTIVITYLEVEL="Quote">
    <Transaction NAME="SendCorrespondence1" AUTOPROCESS="No">
      <Fields>
        <Field>
          <From>SuspenseAmount</From>
          <To>SuspenseAmount</To>
          <DataType>Text</DataType>
        </Field>
      </Fields>
    </Transaction>
  </Transactions>
  <Transactions ACTIVITYLEVEL="Active">
    <Transaction NAME="SendCorrespondence1" AUTOPROCESS="Yes">
      <Fields>
        <Field>
          <From>SuspenseAmount</From>
          <To>SuspenseAmount</To>
          <DataType>Text</DataType>
        </Field>
      </Fields>
    </Transaction>
  </Transactions>
  <MathAndFields>
    <Field>
      <Name>PolicyEffectiveDate</Name>
      <Display>Policy Date</Display>
      <DataType>Date</DataType>
      <Group>Math</Group>
    </Field>
    <Field>
      <Name>DCAFrequency</Name>
      <Display>DCA Frequency</Display>
      <DataType>Integer</DataType>
    </Field>
  </MathAndFields>
</ActivitySummary>
```

```

        <Group>Field</Group>
    </Field>
</MathAndFields>
<DefaultAllocationChanges>Yes</DefaultAllocationChanges> - J2EE Only
<AllocationChanges>Yes</AllocationChanges> - .Net Only
<ActivityResult>
    <Result DISPLAY="Fund Details"> - .Net Only
        <Query TYPE="SQL">SELECT AsFund.FundName [Fund:50:L], AsAllocation.AllocationPercent
[Percent:10:L] FROM AsFund INNER JOIN AsAllocation ON AsFund.FundGUID = AsAllocation.FundGUID WHERE
AsAllocation.RelatedGUID = '[ActivityGUID]'</Query>
    </Result>
    <Result DISPLAY="Allocation History"> - J2EE Only
        <Table> - J2EE Only
            <Results> - J2EE Only
                <Query TYPE="SQL">SELECT AsPolicy.PolicyNumber AS
PolicyNumber, AsPolicy.PolicyName AS PolicyName, AsPlan.PlanName AS PlanName, AsPlan.EffectiveDate AS EffectiveDate
FROM AsPolicy INNER JOIN AsPlan ON AsPlan.PlanGuid = AsPolicy.PlanGUID INNER JOIN AsCompany ON
AsPolicy.CompanyGuid = AsCompany.CompanyGUID AND AsPlan.CompanyGuid <> '[PrimaryCompanyGuid]'</Query>
            </Results> - J2EE Only
            <Column> - J2EE Only
                <Display>Policy Number</Display>
                <Name>PolicyNumber</Name>
                <DataType>Text</DataType>
            </Column>
            <Column>
                <Display>Policy Name</Display>
                <Name>PolicyName</Name>
                <DataType>Text</DataType>
            </Column>
            <Column>
                <Display>Plan Name</Display>
                <Name>PlanName</Name>
                <DataType>Text</DataType>
            </Column>
            <Column>
                <Display>Effective Date</Display>
                <Name>EffectiveDate</Name>
                <DataType>Date</DataType>
            </Column>
        </Table>
    </Result>
</ActivityResult>
</ActivitySummary>

```

## 3. AddPolicyRole

### Description

This Business Rule allows configuration of the AddPolicyRole Business Rule.

### AddPolicyRole Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType	
<AddPolicyRole> </AddPolicyRole>	Required parent element that indicates the opening and closing of the AddPolicyRole business rule.	
<Query>	A valid SQL statement	
<PolicyCollections>		
<PolicyCollection>	ROLECODE	A valid role code

## 4. AddToClientGroup

### Description

This Business Rule allows configuration of the AddToClientGroup Business Rule.

### AddToClientGroup Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType		
<AddToClientGroup> </AddToClientGroup>	Required parent element that indicates the opening and closing of the AddtoClientGroup business rule.		
<Policy>	TYPE	Policy field type.	
	FIELD		
	COLLECTION		
	STINGARRAY		
<Fields>	Start of a section listing transaction columns and fields.		
<Field>	Start of a column/field definition block.		
<From>	Value to place in a column/field, substituting for the source Policy column/field value.	Any math variable or literal.	
<To>	Name of the column/field.		
		Text	Any valid Policy column/field name.

## 5. Address Screen

### Description

This business rule allows for configuration of the non-fixed fields and validations for the Address Roles on the Address Screen. Each definition carries some 'above the line' parameters to specify the field length for the address lines as well as its 'below the line' fields, defined in the usual way. Fixed field values can also be controlled through configuration of this rule.

### AddressScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType		
<AddressScreen> </AddressScreen>	Required parent element that indicates the opening and closing of the AddressScreen business rule.		
<AllowExpiration>	This tag indicates the ability to provide the customer with automated functionality to expire mailing addresses based on date criteria and a contingent value established to introduce an active or inactive status.		

			Indicates the ability to add another column named "Status," and will be displayed beside the Address. Depending on the value of AllowExpiration and Status, the trash-can will be conditionally displayed beside the Address. <b>Example:</b> <AllowExpiration>"Yes"</AllowExpiration>
		Yes	Indicates existing address is automatically expired. The Address is not deleted but the 'Status' column displays as 'Expired', no trash can icon is displayed and the address fields are disabled (except the Expiration Date field).
		No	Indicates existing address is not automatically expired. The "Status" column is not displayed beside the Address(es). Should be able to delete the address associated with a Client, if it is not a default address.
<AllowAddressAutoCorrect>	<AllowAddressAutoCorrect> tag enables/disables the warning generation and the auto correction features. The auto correct for the Address where the entered City and State fields are verified based on the postal-code.		
		String	An element value should be specified to Allow address to be Auto Corrected when the entered City and State fields don't match the look-up values. Example: <AllowAddressAutoCorrect WARNING="Yes">Yes</AllowAddressAutoCorrect>
		Yes	Indicates the ability to auto correct the address when the entered City and State fields don't match the postal-code in the database record.
		No	The system doesn't auto correct the Address where the entered City and State values do not match the same values in the AsPostalCode table.
	WARNING	Yes	Warning message will be displayed indicating how the system will correct the city/state entered if it does not match the postal code.
		No	No warning message will be displayed prior to the city/state correction.
<Address>	Indicates the start of address definition for fields and validations applying to the policyholder. Used to specify the particular Address Role.		
	ROLE	Code	Indicates the Code value from the AsCodeAddressRole table to specify the AddressRole.

	DEFAULT	Yes	Allows the address role type to be available for setting/selecting as the default address (ie.the radio button against this role will appear enabled). If this attribute is omitted, then this is the default behavior.
		No	Prevents the address types from being set as the default address when Address Screen opens initially.
<FixedFields>	Changes the labels on the above the line fixed fields. Refer to the Transaction Configuration section of the Technical Manual for additional detail and available options. FixedFields is not dynamic and does not create a new field. This <FixedFields> tag encompasses the <Fields> and <Field> tags.		
		String	The Fixed Fields must correspond to a column in the AsAddress database table.
<Fields>	Dynamically changes labels on the 'below the line' fields. Refer to the Transaction Configuration section of the Technical Manual for Fields Element detail and available options.		
		String	The Dynamic Fields must correspond to a column in the AsAddressField database table.
<MultiFields>	RULE		
<Buttons>			
<Button>	Defines the name of the button		
<OnLoad>	Indicates the start of field definition and values applying to math calculation to enable this functionality. Refer to the OnLoad and OnChange sections of the Transaction Configuration section in the Technical Manual. This contains further information about the available options for these elements.		
<Field>	This field initiates the change. The name of the field will be prefaced with the datatype abbreviation. Identifies the field that invokes the OnLoad.		
		String	DataType abbreviations plus Field Name.
<OnChange>	Indicates the start of field element values to facilitate processing when the field change affects the content of another field. This allows change to one or more fields based on the value of a trigger field. OnChange is only stated and applied within a defined Address screen XML section.		
<Change>			
<Commands>			
<Command>	TYPE	Command Name	
<Parameters>			
<Parameter>	NAME	Parameter Name	
		Parameter Value	
<ValidateRoutingNumber>	This tag is used to validate bank routing numbers on the Address screen for the EFT address type. The validation will work in tandem with a database table, AsRoutingNumber, which contains bank names and their routing numbers. For the EFT Address Role three dynamic fields (AccountNumber, RoutingNumber, and Bank Name) should be configured. Upon entering a routing number in one of the fields, the bank's name will automatically appears if there is a matching bank for that routing number.		

		String	Indicates an element value to be specified between the <ValidateRoutingNumber> tags to turn on/off the validation on routing number functionality.
		Yes	Enables the validation functionality.
		No	Indicates the functionality will be disabled.
	BANKNAME	String	Indicates the exact value of the corresponding field name in the EFT type Address Role. If this attribute value doesn't exist or attributes' value is left empty, then an error will be produced.
	ROUTINGNUMBER	Integer	Indicates the exact value of the corresponding field name in the EFT type Address Role. If this attribute value doesn't exist or attributes' value is left empty, then an error will be produced.
<Functions>	<p>This is the opening tag for the rule to define the function name. It allows you to add multiple functions within the individual &lt;Function&gt; tags. Indicates the ability to invoke a remote web-service call to validate and confirm the existence of Bank Information in their "ABCBank" database when saving the RoutingNumber for an EFT Address Role on the Client Address Screen. This functionality is added on the Client Address Screen Save button as part of the validation. If an error is in the returning result then Save will fail. If successful, the Bank Name returned in the return values will be saved in the AsAddressField table.</p> <p><b>Note:</b> A Web Service is required for the call.</p>		
<Function>	<p>This tag begins the definition of a single function. Will allow you to add a function that is defined in a rule for a web service that exists and will take the appropriate parameters. Defines the single function.</p>		
<Category>	<p>This element specifies the name of the Category, under which the Function falls. Define the Category for the Function. There are currently two categories available: Search and Validate. Function Category defines what effect this function has on the screen.</p>		
		<p>Indicates the name of the category to be specified between the &lt;Category&gt; tags to define the effect of this function on the Address screen. <b>Example:</b> &lt;Category&gt;Validate&lt;/Category&gt;</p>	
<ExternalKeys>	<p>This tag begins the list of key fields required by the operation.</p>		
<ExternalKey>	<p>This tag defines a single key field required by the Function. This key field must be present in the Role fields. A key to look for in the response from an external system call. The External Keys defined in the WebService Business Rule are expected to exist in the return value of the web service call. The external key value is updated to the Address dynamic fields.</p>		
		String	The <ExternalKey> tag value is the

			name of a dynamic Field defined on the AddressScreen Business Rule for relevant Role. <b>Example:</b> <ExternalKey>BankName</ExternalKey>
<Name>	This tag indicates the name of the web service that is defined inside the WebService business rule which is referenced in the ServiceName tag.		
		String	Indicates the function name that is defined in the WebService business rule. Function <Name> tag should EXACTLY match with the <ServiceName> tag in the WebServicebusiness rule. <b>Example:</b> <Name>ABCBankValidate</Name>
<Type>	This tag indicates the type of function. There is currently one type of function: WebService. Currently only WebService type of function is supported.		
		String	Indicates the type of the function. <b>Example:</b> <Type>WebService</Type>
<RuleName>	This tag indicates the name of the business rule, which is predefined, and holds the function definition.		
		String	Indicates the Business rule name <b>WebServices</b> , which contains Web Services Definitions. <b>Example:</b> <RuleName>WebServices</RuleName>

## AddressScreen Image

## AddressScreen Database Tables

Table Name	Description
AsActivity	Holds date information (effective date, expiration date, etc.)
AsAddress	Location information: physical address, email, phone
AsAddressField	Stores field names and values relating to Addresses



AsAddressRole	Associates a client with an address. Clients may have several addresses of varying types and several clients may share the same address.
AsClient	Holds people and corporations/companies that can fill various roles related to policies.
AsClientField	Stores Field names and values related to Clients
AsCode	Stores a list of all OIPA codes and their related descriptions

## XML Example

```

<AddressScreen>
  <AllowExpiration>Yes</AllowExpiration>
  <Address ROLE="03">
    <MaximumAddresses >1<MaximumAddresses>
    <PoliciesAffected TYPE="SQL">SELECT PolicyGUID... </PoliciesAffected>
    <SQLForImpactedRoles>SELECT AddressGUID From ...</SQLForImpactedRoles>
    <FixedFields>
      <Field>
        <Name>EffectiveDate</Name>
        <Display>Effective</Display>
        <Hidden>No</Hidden>
      </Field>
      <Field>
        <Name>ExpirationDate</Name>
        <Display>End</Display>
        <Hidden>No</Hidden>
      </Field>
    </FixedFields>
    <Fields>
      <Field>
        <Name>AcmeAccount</Name>
        <Display>AcmeAccount</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
  </Address>
  <Address ROLE="05">
    <Fields>
      <Field>
        <Name>BankAccountNumber</Name>
        <Display>Bank Account Number</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
    <Validation>
      <Expressions>
        <Expression MESSAGE="City is Required">document.frmS3Client.txtCity.value != "</Expression>
        <Expression MESSAGE="State is Required">document.frmS3Client.cmbStateCode.value !=
        ...</Expression>
      </Expressions>
    </Validation>
  </Address>
  <Address ROLE="07">
    <Fields>
      <Field>
        <Name>CarrierCode</Name>
        <Display>Carrier Code</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
  </Address>
</AddressScreen>

```

## 6. AddressFieldsEditMode

### Description

This business rule defines the fields, indicator, and the conditions under which the fixed and dynamic fields are to be disabled from the Address Screen for the various address types.

### Address Fields Edit Mode Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<AddressFieldsEditMode> </AddressFieldsEditMode>	Required parent elements that indicate the opening and closing of the Address Fields Edit Mode business rule.		
<Address>	The Address element is used to define the Address Role which in turn is selected from the AsCodeAddressRole table for which the fields/validations apply.		
	ROLE	Code	This attribute is used to specify the CodeValue of AddressRoleCodes as defined in the AsCodeAddressRole table. <b>Note:</b> One or more AddressRole Codes can be specified in a Comma separated list. Example:<Address ROLE= "02,03">
<DisableFields>	The DisableFields element controls whether the Fixed and Dynamic Fields are enabled or disabled based on a conditional test that is specified in the EXPRESSION attribute. Used to indicate if all fields should be disabled or only specified ones.		
	EXPRESSION	String	Conditional Test (xxx=xxx) Fields from AsAddress and AsAddressField database table are available for the Expression attribute. <b>Example:</b> <DisableFields EXPRESSION= "Address:AddressLine1'= '[Address]'" DISABLEALL="Yes/No">
	DISABLEALL	Indicates if all Fields should be disabled or only specified ones.	
		Yes	All fields will be disabled if conditional test is true.
No	Only configured fields will be disabled if conditional test is true.		
<FixedFields>	Dynamically changes labels on the 'above the line' fixed fields.		
<Fields>	This element defines the field descriptions, display and type of fields on the AddressScreen. The <u>Transaction Element</u> document contains further information about the <Fields> element and the available options.		
<DynamicFields>	Dynamically changes labels on the 'configured' fields.		
<Fields>	This element defines the field descriptions, display and type of fields on the AddressScreen. The <u>Transaction Element</u> document contains further information about the <Fields> element and the available options.		

### Address Fields Edit Mode Database Tables

Table Name	Description
AsAddress	Location information: physical address, email, phone
AsAddressField	Stores field names and values relating to Addresses

AsAddressRole	Associates a client with an address. Clients may have several addresses of varying types and several clients may share the same address.
---------------	--

## XML Example

```
<AddressFieldsEditMode>
  <Address ROLE="02">
    <DisableFields EXPRESSION=""Address:AddressLine1'= '[Address]'" DISABLEALL="No">
      <FixedFields>
        <Fields>
          <Field>AddressLine1</Field>
        </Fields>
      </FixedFields>
      <DynamicFields>
        <Fields>
          <Field>TaxCode</Field>
          <Field>County</Field>
        </Fields>
      </DynamicFields>
    </DisableFields>
    <DisableFields EXPRESSION=""Address:PostalID' = '[PostalCode]'" DISABLEALL="Yes"></DisableFields>
  </Address>
</AddressFieldsEditMode>
```

## 7. AgentLookupRule

### Description

This Business Rule provides the information required for looking up an Agent from an external system.

The AsRole for Agent roles uses the HierarchyGUID column; therefore, the rule provides the dummy ClientGUID for those role records.

### AgentLookupRule Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<AgentLookup> </AgentLookup >	Required parent element signifying the opening and closing of the business rule.
<Object>	Indicates the company.
<AgentNumber>	Tag specifying the Agent number.
<DummyClientGUID>	Signifies a global unique identification number set up for administration purposes.

## XML Example

```
<AgentLookup>
  <Object>AdminServerACMEUI.Agent</Object>
  <AgentNumber>ProducerNumber</AgentNumber>
  <DummyClientGUID>{CC5AB0B0-D68D-48A5-B3B9-70CE73783E1B}</DummyClientGUID>
</AgentLookup>
```

## 8. AllocationScreen

### Description

This Business Rule defines the fund allocation screens for policy, plan and segment level allocations. Allocations are done to specify how money can be applied to the Policy. The AsAllocation table is used for allocations to the policy.

The Allocation screen is not required for valuation or fund processing; however, it is commonly used to satisfy business workflow process.

### AllocationScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Option		
<AllocationScreen> </AllocationScreen >	Required parent elements that indicate the opening and closing of this business rule.		
<Allocations>	Indicates the Allocation level. The AllocationScreen Business Rule is used to configure both the Policy Allocation Screen, Plan Allocation Screen as well as Segment Allocation Screen.		
	TYPE	Indicates the Allocation level.	
		Plan	Defines Allocation configuration is at the plan level.
		Policy	Defines Allocation configuration is at the policy level.
		Segment	Defines Allocation configuration is at the segment level.
	USEEFFECTIVEDATE	Indicates display of different effective dates applicable to a Model and allows the user to select group of allocations by Model and Effectivedate (i.e. When a product supports more then one version of the same model, all versions can be shown and any version can be available for selection - saved back as policy allocations with associated effective date).	
		Yes	Defines that the date can be specified at the Plan or Policy level.
		No	Effective date is not used.
	AMOUNTPRECISION	Constant	To specify the maximum number of digits allowed after the decimal point. <b>Note:</b> There is no restriction to the maximum or minimum value in the code. If this attribute is not used, the default value, "2" will be used.
	UNITPRECISION		
	PERCENTPRECISION		

	ALWAYSEQUALPERCENT	Yes	Allocation percents will be calculated irrespective of the number of funds. <b>Example:</b> If there are three funds, then the split is 33:33:34). If there are four funds then the split is 25:25:25:25.
		No	Allocation percents will be calculated only for the even number of funds. If there are an odd number of funds, their percentage boxes will be populated with zeros <b>Example:</b> Four funds can be divided evenly to 25:25:25:25 whereas dividing three funds will result in uneven splits. Hence, the system is designed to populate the percentage boxes with 0:0:0 values whenever there are an odd number of funds. <b>Note:</b> Yes is the default behavior. (i.e. if this attribute is not present, then the system should always calculate the percentages regardless of the number of funds.)
	ALLOCATIONDATE	Policy Field	When this attribute is used, it indicates that the Funds used in the allocation should be based on the effective date specified in this field and not based on the Policy's effective date <b>Note:</b> This attribute is not widely used. If used, then an AllocationDate field should be configured in the PolicyScreen and the same should be referenced in the AllocationScreen.

<FundFamily>	<p>Fund family is a group of funds that have a similar investment goal. Fund Family is the table along with Fund Class that is used when there is a need to configure a set of funds that must be used for allocations because a certain criteria exists on a policy. FundClass is used to track which funds in the FundFamily Table are in a specific set of funds. FundFamilyGUID defines what funds are in a subset of funds.</p> <p><b>Note:</b> &lt;FundFamily&gt; tags can be defined in two different ways, One within the &lt;Allocations&gt; tag, the other within the &lt;Allocation&gt; tag.  1) If defined within &lt;Allocations&gt; tag, then POLICYFIELD, PLANFIELD and SEGMENTFIELD are the valid attributes. But only one of them should be present at any time.  2) If present within the &lt;Allocation&gt; tag, then only FUNDCLASSGUID attribute is valid</p> <p><b>Either one of these attributes (POLICYFIELD or PLANFIELD or SEGMENTFIELD or FUNDCLASSGUID) MUST be present.</b> These attributes is useful in restricting the availability of funds (for allocation) to only those assigned to the given Fund Class.</p> <p>Fund families are created in the AsFundFamily table. In order to set-up fund families, FundClassGUID for each class and the fundGUID for each fund that is in a fund class are needed. A spreadsheet can be prepared to organize each of the FundClassGUIDs and their associated FundGUIDs.</p> <p><b>Important Note:</b> Fund Family records cannot be created through the PAS application. INSERT INTO statement should be used to enter the required data which in turn will create records in both the AsFundFamily table and AsFundClass table</p>		
	POLICYFIELD	PolicyField	This attribute is used to identify a field within the <PolicyScreen> rule. This field will contain a FundClassGUID in the AsFundFamily table. This table is used to group funds under a Fund Class.
	SEGMENTFIELD	SegmentField	This attribute is used to identify a field within the <SegmentScreen> rule. This field will contain a FundClassGUID in the AsFundFamily table. This table is used to group funds under a Fund Class.

	PLANFIELD	PlanField	This attribute is used to identify a field within the <PlanScreen> rule. This field will contain a FundClassGUID in the AsFundFamily table. This table is used to group funds under a Fund Class.
	FUNDCLASSGUID	Constant	This attribute is used to identify a FundClassGUID in the AsFundFamily table. This table is used to group funds under a Fund Class.
<Allocation>	The Allocation tag is a required sub element that indicates you are configuring a specific allocation. The Allocation tag has specific attributes that help define the allocation further.		
	TYPECODE	Allocation TypeCode	The Allocation Code number that is defined in AsCodeAllocationType.
	EXCLUDETYPE	FundType Code	List of Fund Types(comma separated codes) that should be excluded from the Allocation Fund drop down list.

MODEL	AllocationType Code	<p><b>Models</b> are a group of funds with specific allocations that share in an investment goal. An investor can select a model for their allocations, which includes all of fund and the specified amount. In OIPA a model creates a template of allocations and allocation amounts. Models are set-up via the Plan's Allocation Screen. In order to setup the model on the Allocation Screen, you must configure a typecode and AllocationScreen Business rule. Model data is stored in the Allocations table and can be located using the TypeCode that is stored in this table.</p> <p><b>Note:</b> AsAllocation table is used to define a Fund Model. There is no specific Fund Model table that creates the required relationships needed to build Fund Models. FundGUID,RelatedGUID and (Allocation) TypeCode columns in AsAllocation table are used in defining the Fund Model.</p> <p>1) FUNDGUID: Individual Funds used in a model.</p> <p>2) RELATEDGUID: Is the POLICYGUID with allocations.</p> <p>3) TYPECODE: The model allocation typecode.</p>
PERCENTPRECISION	Constant	To specify the maximum number of digits allowed after the decimal point.
AMOUNTPRECISION		
UNITPRECISION		
FUNDLIMIT	Integer	Sets a limit for all allocations attached to a policy.
EXCLUDEFUNDNAME	FundName	Name of fund to be excluded.



	EXCLUDEFUNDSTATUS	FundStatus	To prevent the Funds (that are in the specified Fund Status) from being available for allocation <b>Example:</b> EXCLUDEFUNDSTATUS = "01,03" - Indicates that the Funds which are in these status should not be available for allocation. 01 & 03 may indicate Active & Closed Fund Status, respectively.
<AllocationMethods>	Lists the Allocation Methods that apply to this allocation type.		
		AllocationMethod Code -	Defines AllocationMethod Code (percent, amount, units, etc.) Refer to the Database Tables section in the Technical Manual under AsCodeAllocationMethod for details and options.
<AllocationTransfer>	REPEATFUNDS	Yes	Allows user to select the same fund in the From and To sections for a transfer type transaction.
		No	
<AllocationFrom>	This element is used to identify the list of Funds that should be available for Transfer.		
	EXCLUDETYPE	FundTypeCode	List of FundTypes (comma separated codes) that should be excluded from the Allocation Fund drop down list.
	MODEL	AllocationType Code	In OIPA, a model creates a template of allocations and allocation amounts. Models are set-up via the Plan's Allocation Screen. In order to set-up the model on the Allocation Screen, you must configure a typecode and AllocationScreen Business rule. Model data is stored in the Allocations table and can be located using the TypeCode, which

		<p>is stored in this table.</p> <p><b>Note:</b> AsAllocation table is used to define a Fund Model. There is no specific Fund Model table that creates the required relationships needed to build Fund Models. FundGUID, RelatedGU ID and (Allocation) TypeCode columns in AsAllocation table are used in defining the Fund Model.</p> <p>1) FUNDGUID: Individual Funds used in a model</p> <p>2) RELATEDGUID: Is the POLICYGUID with allocations</p> <p>3) TYPECODE: The model allocation typecode</p> <p>This attribute can be used only for a Plan level allocation.</p>
IF	Expression	Defines the condition. Only when satisfied, Allocation From funds will be displayed in the Allocation Screen.
AMOUNTPRECISION	Constant	<p>To specify the maximum number of digits allowed after the decimal point. <b>Note:</b> There is no restriction to the maximum or minimum value in the code.</p> <p>If this attribute is not used, the default value, "2" will be used.</p>
PERCENTPRECISION		
UNITPRECISION		
FUNDLIMIT	Integer	To set the limitation on the number of funds that can be made available for Allocation.
EXCLUDEFUNDNAME	FundName	Name of the Fund to be excluded from the Allocation.
EXCLUDEFUNDSTATUS	FundStatus	To prevent the Funds (that are in the

			specified Fund Status) from being available for allocation.
METHODCODES	AllocationMethod Code		Defines AllocationMethodCode (percent, amount, units, etc.)
ALLOWMIXEDMETHOD	Yes		Allows different method codes to be specified for each allocation that is moving money out.
	No		
AMOUNTMINIMUM	Constant		Validation to determine if the Fund amount is at least equal to the specified minimum amount.
PERCENTMINIMUM			
UNITMINIMUM			
INCLUDEFUNDFIELD	FieldName from the FundScreen		These attributes work together as a filter to determine the funds that should be available(included) for allocation in the Funds dropdown box in the AllocationScreen. The value of INCLUDEFUNDFIELD specifies a Fund Field in the FundScreen and the value of INCLUDEFUNDFIELD VALUE specifies the value for that particular field. Only those funds that satisfy the condition (that the specified FundField having the specified value ) can become available for Allocation.
INCLUDEFUNDFIELDVALUE	Constant		
EXCLUDEFUNDFIELD	FieldName from the FundScreen		These attributes work together as a filter to determine the funds that should NOT be available (excluded) for allocation in the Funds dropdown box in the AllocationScreen. The value of EXCLUDEFUNDFIELD specifies a Fund Field in the FundScreen and the value of EXCLUDEFUNDFIELD VALUE specifies the value for that particular
EXCLUDEFUNDFIELDVALUE	Constant		

			field. If any of the Funds satisfies this condition (i.e., if the specified Fund Field has the specified value ), then that Fund should not be available for Allocation.
<AllocationTo>	This element is used to identify the list of Funds that should be available for Transfer. <b>Note:</b> Refer to the descriptions given in the <Allocation From> section above.		
<PolicyModels>	<p>Starting element of PolicyModel section. Models are set-up via the Plan Allocation Screen. &lt;PolicyModels&gt; element is used to access these Models at the Policy level allocation</p> <p><b>Note:</b> PolicyModels and Allocations share AsCodeAllocationType table. Some of the AllocationTypeCodes are reserved for Models and the others can be used for general allocations.</p> <p>Policy Models are set up at the Plan level AllocationScreen. The set-up in Plan level AllocationScreen may not always indicate that it is a Policy Model.</p>		
	COPYTO	AllocationType Code	<p>This attribute's value represents the AllocationTypeCode of a Policy level allocation to which the Model should be copied to. &lt;PolicyModel TYPECODE=""&gt; is used to populate the Model dropdown box with the specified Models. When the User selects a particular Model in that dropdown box, it means that the allocation set-up of that particular Model should be applied to the Policy level allocation (for the specified AllocationTypeCode)</p> <p><b>Note:</b> &lt;PolicyModel TYPECODE=""&gt; element is also used for specifying the AllocationTypeCode of the PolicyModel.</p>
<PolicyModel>	This element is used to list the Models (that are configured at the Plan Allocation Screen) in the Policy Allocation screen. The element should be added for each Model that should be available for the Policy.		
	TYPECODE	Model's AllocationType Code	<p>This attribute's value represents the Plan level AllocationTypeCode of a PolicyModel. When a particular Model is selected in the Model dropdown box, it means that the allocation set up of that particular Model should be applied to the Policy level allocation (for the</p>

			specified AllocationTypecode). <b>Note:</b> The AllocationTypeCode of the Policy level allocation is mentioned in the <PolicyModels COPYTO=""> element.
<PolicyModelField>	A dynamic field is configured in the Policy Screen to hold the list of applicable Policy Models for that Policy's Plan. The User then selects a Model and saves the Policy. <PolicyModelField> element in AllocationScreen is used to pull out the value from this particular Policy Field and write a new allocation or override any existing allocation, as per the selected Model's set up.		
	POLICYFIELD	PolicyFieldName	This attribute is used to specify the Field Name in the PolicyScreen BR.
<PolicyModelTypesField>	A dynamic field is configured in the Policy Screen to hold the list of applicable AllocationTypes for a Particular Policy Model. The User then selects a Model and saves the Policy. Using <PolicyModelField> element, the Model that should be used for creating the allocation is determined. Using <PolicyModelTypesField>, the AllocationType in that particular Model that should be used for setting up the allocation is determined.		
	POLICYFIELD	PolicyFieldName	This attribute is used to specify a Field Name in the PolicyScreen BR.
<UseFundClassAllocation>	This element is used to specify the Policy Field Name to attach the fund class allocation model to the policy for use. When retrieving data from the database, this field can be used as an identifier of policies that use fund class allocations. This field can be configured in various ways to suit the needs of the plan and/or client.  This element is supported at the TYPE="Policy" level only. Valid values are any valid AsCodeFundClassAllocationType.CodeValue or a reference to a field in AsPolicy. Existing AllocationMethods element supports only Percent allocations.		
		PolicyField Name	This Field should be configured in the Policy Screen to connect the Policy to the correct Fund Class Allocation Type. <b>Note:</b> The values associated with the Field's selections MUST match the code value in AsCodeFundClassAllocationType of the Fund Class Allocation that should be used. <b>Example:</b> 1) <UseFundClassAllocation> 01 </UseFundClassAllocation> 2)<UseFundClassAllocation>Policy:PolicyField1</ UseFundClassAllocation>.
<FundClassAllocations>	This element is used to specify the Allocation level from which Fund Class set-up should be applied.		
	TYPE	Plan	This attribute is used to specify the level of allocation.

<FundClassAllocation>	This element is used to specify the list of AllocationTypeCodes that should be available for allocation.		
	TYPECODE	AllocationType Code	This attribute is used to specify the list of AllocationTypeCodes from AsCodeAllocationType that should be available for allocation.
<DisableAllocationFields>	This element is used to disable the fields of certain Allocation Types in the AllocationScreen based on the Policy Status.		
<DisablePolicyStatus>	This element is used to specify the list of Policy Status code for which Fields in AllocationScreen should be disabled.		
		PolicyStatus Code	Comma separated Policy Status Code from AsCodeStatus table.
<OnLoad>	Indicates the start of field definition and values applying to math calculation to enable this functionality. Refer to the OnLoad and OnChange sections of the Transaction Element document. This contains further information about the available options for these elements. <b>Note:</b> This element is applicable when OnChange element is present. It contains a list of field name(s) that triggers the Onchange when the page is loaded.		
<OnChange>	Container for OnChange configuration. Indicates the start of field element values to facilitate processing when the field change affects the content of another field. This allows change to one or more fields based on the value of a trigger field. OnChange is only stated and applied within a defined multifield section.		
<Validation>  This feature is to help the developers to debug the configuration. It should never be used or turned on in Production. Also, this kind of Validation is not used widely.	Allows validation of Allocation entries. <b>Note:</b> Validation can be performed by either using a <Commands> element or by evaluating the condition through <GlobalVariable> element		
	If <Commands> are used, then for each <Command> subelement, a set of Parameter values should be satisfied.		
	If <GlobalVariables> are used, then the specified condition in the corresponding <GlobalVariable> should be satisfied.		
	Either way, the Name of the <Command> or the <GlobalVariable> should be specified in the <ERROR> element to get the appropriate error message to be displayed.		
	DEBUG	Yes	Turns on the validation and performs the check as per the instructions provided in the <Validation> element.
		No	
<Instructions>	Starting element of the Instructions tag. This is to define the condition for which validation should be performed.		
<Commands>	Starting Element for the command section.		
<Command>	This element is used to define the condition that should be executed when the OK button in the AllocationScreen is clicked. <b>Note:</b> Commands are special to AllocationScreen and either perform certain actions on the AllocationScreen or return certain data about the current state of the Allocations selected by the user.		
	NAME	AnyNameforthe Command	Name of the Command.

	TYPE	CopyTo / FundsAreContained In / AllocationsAreEqual -	<b>CopyTo</b> - Copy the allocations of one type (a block on the screen) to another type (a different block on the screen) <b>FundsAreContainedIn</b> - Checks if funds from one allocation type are contained in another allocation type; puts true/false in the specified name <b>AllocationsAreEqual</b> - Checks if any two allocations are the same.
<Parameters>	This element is used to supply the data required to perform certain actions by the <Commands> element.		
		Constant / MathVariable	Defines the values.
	NAME	AnyNameforthe Parameter	Name of the Parameter.
<MathVariables>	Opening and Closing element that encompasses the MathVariables.		
<GlobalVariable>	This element is used to define the MathVariables that are used in deciding whether an error message should be displayed or not.		
<Errors>	Starting element that encompasses the list of error messages that should be displayed according to the Validation result.		
<Error>	This element is used to configure the error message that should be displayed.		
	ONTRUE	GlobalVariable / CommandName	Name of MathVariable being used for validation.
	MESSAGE	Some Message	Message to be displayed upon validation.

## AllocationScreen Image

**Future Allocations**

Number of Funds: 2  
Allocation Method: Percent

☐ Equal %

Fund	Percent
AIM BASIC VALUE (Z03JV0)	50
BLK BASIC VALUE V.I. (H03JB0)	50
	100

**Merged Allocations**

Number of Funds: 3  
Allocation Method: Percent

☐ Equal %

Fund	Percent
VIP Fix Fund	50.00
AIM BASIC VALUE (Z03JV0)	25.00
BLK BASIC VALUE V.I. (H03JB0)	25.00
	100.00

OK Close

**Allocation(s):**

Number of From Funds: 2  
Allocation Method: Mixed

From Fund	Mixed
ACME - Balanced	Percent
ACME - Balanced	Percent

Percent  
Amount  
Mixed

Number of To Funds:  
Allocation Method: Percent

☐ Equal %

To Fund	Percent
	0



## Allocation Screen Database Tables

Table Name	Description
AsAllocation	Stores the Fund Allocation attached to a Policy, a Plan or an Activity
AsCode	Stores a list of all OIPA codes and their related descriptions
AsFund	Contains the names of the fixed and variable funds
AsFundClass	Stores the Fund Series information
AsFundClassAllocation	Defines the allocation methods of groups of funds
AsFundFamily	Groups funds and fund classes together
AsFundField	Stores Field names and values related to Funds
AsFundGroup	Defines relationships between funds
AsFundStatus	Stores the status of all Funds in the system
AsFundWeight	Relative weights of funds

## XML Example

```

<AllocationScreen>
  <Allocations TYPE="Plan" AMOUNTPRECISION="2" PERCENTPRECISION="2" USEEFFECTIVEDATE="Yes">
    <Allocation FUNDLIMIT="01" TYPECODE="01">
      <AllocationMethods>01</AllocationMethods>
    </Allocation>
    <Allocation EXCLUDETYPE="01,06,07" EXCLUDEFUNDNAME="" FUNDLIMIT="01" TYPECODE="06">
      <AllocationMethods>01</AllocationMethods>
    </Allocation>
  </Allocations>
  <Allocations TYPE="Segment" AMOUNTPRECISION="2" PERCENTPRECISION="2">
    <FundFamily POLICYFIELD="FundFamily"></FundFamily>
    <Allocation TYPECODE="05" FUNDLIMIT="05">
      <AllocationMethods>01,02,03</AllocationMethods>
    </Allocation>
  </Allocations>
  <Allocations TYPE="Policy" USEEFFECTIVEDATE="Yes" AMOUNTPRECISION="2" PERCENTPRECISION="2"
  ALWAYSSEQUALPERCENT="Yes">
    <Allocation EXCLUDETYPE="06,07" FUNDLIMIT="19" TYPECODE="14">
      <AllocationMethods>01,02</AllocationMethods>
      <DisableAllocationFields>
        <DisabledPolicyStatus>01,02</DisabledPolicyStatus>
      </DisableAllocationFields>
      <AllocationTransfer REPEATFUNDS="No">
        <AllocationFrom ALLOWMIXEDMETHODS="No" AMOUNTMINIMUM="100"
        EXCLUDETYPE="01,06,07"
        FUNDLIMIT="01" METHODCODES="02"></AllocationFrom>
      </AllocationTransfer>
    </Allocation>
    <FundsByState>Yes/No</FundsByState>
  </Allocations>
  <DisableAllocationFields>
    <DisabledPolicyStatus>01,04,07,10,30,36</DisabledPolicyStatus>
  </DisableAllocationFields>
</AllocationScreen>

```

## 9. ApprovalScreen

### Description

This Business Rule is used to define various sections of a plan as requiring approval by state. This rule is configured to display on the screen, only the states that are valid for the specified plan. The configuration also includes any approved rider/features with their effective and expiration dates, for the specified plan and state.

## ApprovalScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType		
<ApprovalScreen> </ApprovalScreen >	The required opening and closing elements of this business rule.		
<PlanApproval>	This element dictates how to display the approval of the plan on the screen.		
	DISPLAY	String	The required text value to be used as display of the field data on the screen.
<Approvals>	This element describes which sections of the policy to allow approvals.		
	TYPECODE	String	TypeCode of the approvals to be used; a value of 03 allows you to create approvals for certain sections at a plan level.
<Approval>	The identification of the approval that will be referenced in other parts of the system <i>(to determine if a particular "section" has been approved)</i>		
	NAME	String	

## ApprovalScreen Image

State Approvals

Company: Acme Life Plan: BOLI (06/24/2002) State: DE

Add Delete Refresh

State Approvals

Page 1 of 1 Page 1 Maximum Results: 60

	State Approval Type	Effective Date	Expiration Date
<input type="checkbox"/>	DBRider		
<input checked="" type="checkbox"/>	Default	01/01/2000	
<input type="checkbox"/>	GMIBRider		
<input type="checkbox"/>	Other		

Save Close

## Database Tables for ApprovalScreen

Table Name	Description
AsCode	Contains a listing and description of all valid codes and their values
AsApproval	Stores states in which products can be sold

## XML Example

```

<ApprovalScreen>
  <PlanApproval DISPLAY="Plan Approval"></PlanApproval>
  <Approvals TYPECODE="03">
    <Approval NAME="DBRider" DISPLAY="Disability Rider Approval"></Approval>
    <Approval NAME="Other" DISPLAY="Some Other Approval"></Approval>
  </Approvals>
</ApprovalScreen>

```

</Approvals>  
</ApprovalScreen>

## 10. AssignmentProcessing

### Description

This Business Rule allows benefit split and liquidity processing to occur after assignment processing has occurred, in relation to the movement of money at the underlying valuation level. The resulting values of assignment processing on valuation can then be scaled to the appropriate level and applied at the benefit or liquidity level. **Note:** While this is an attached Business Rule it is NOT included in the Transaction Business Rule Packet.

Element\Tag	Attribute\Definition\Value\Data Type		
<AssignmentProcessing> </AssignmentProcessing>	The required opening and closing elements of this business rule.		
<Assignment>	By default, the assignment section collapses at the deposit level during exchanges.		
<Collapse>	Defines the collapsing of Funds or Deposit during trades.		
	LEVEL	Text. The level to which money is grouped in during the assignment process	Fund
	MONEYTYPECODE	Code (Valid MONEYTYPECODE)	Any valid code from AsCode with code name of AsCodeMoneyType.
<Post>	This element contains logic definitions for processing post-accumulation-assignment.		
	PROCESS	Yes	Adjustment will occur to the benefit split and update the benefit split record.
		No	Adjustment will not occur to the benefit split.
		String	Mathvariable
	USEPERCENT	Defines whether the PercentResult tag value should be used in interpreting the rule	
		Yes	PercentResult tag value will be used in interpreting the rule.
		No	PercentResult tag value will not be used.
		String	Mathvariable containing Yes or No.
	REDEMPTION MONEYTYPE	Code	Type of money for the redemption fee (as defined in AsCode=>AsCodeMoneyType).
<SyncOriginalUnits>	Determines whether the original benefit split records should also be updated.		
		Yes	Original benefit split records will be updated.
		No	Original benefit split records will not be updated.
<AIR>	This element defines which child funds to use when changing the AsBenefitSplit records. During processing the money movement (i.e., NUVs) is based on the child fund records associated with the parent fund.		
		String	MathVariable containing a segment field that

			will have Benchmark rate.
<WriteBenefitChange>	Describes whether it will write to Benefit Change or not.		
		Yes	Record will be written to the AsBenefitSplitChange table.
		No	Record will not be written to the AsBenefitSplitChange table.
<SegmentGUID>	The SegmentGUID that is used.		
		String	MathVariable containing the SegmentGUID.
<RecalculateFees>	Defines whether or not to recalculate the fees associated with the money movement – necessary for certain actuarial situations. This element is applicable when the product has redemption fees, which is when REDUMPTIONMONEYTYPE attribute is present in <BenefitSplit> element.		
		Yes	
		No	
<PercentResult>	Percent of benefit which should be left after the change. This element is used when the USEPERCENT attribute is present inside of the <BenefitSplit> element.		
		String	MathVariable containing a whole number from 1-100.
<NetResult>	Identifies whether fees should be applied as net part of the result or as gross.		
		Yes	Fees will be applied as a Net part of the result.
		No	Fees will be applied as a Gross part of the result.
		String	MathVariable containing Yes or No

## XML Example

```

<AssignmentProcessing>
  <Assignment>
    <Collapse LEVEL="Fund/Deposit" MONEYTYPECODE="01"></Collapse>
  </Assignment>
  <Post>
    <BenefitSplit PROCESS="Yes" USEPERCENT="Post5UsePercentage">
      <SyncOriginalUnits>Yes</SyncOriginalUnits>
      <AIR>MyBRRMathVariable</AIR>
      <PercentResult>RemainingBenefitPercent</PercentRemaining>
      <NetResult>Yes</NetResult>
    </BenefitSplit>
  </Post>
</AssignmentProcessing>

```

## 11. AssignRoleScreen

### Description

This business rule allows for the configuration of the Roles Screen; the Maintain Roles and Current Roles sections of the screen are configurable using an XML table structure. Available roles are viewable via a drop-down combo-box within the Maintain Roles section. Through custom edits, the Current Roles section contains three check boxes that dictate what role information is to be displayed based on the status selected.

## AssignRoleScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<AssignRoleScreen> </AssignRoleScreen>	Required parent element that indicates the opening and closing of the AssignRole business rule.		
<RoleSelection>	Indicates format of Assign Role Screen.		
		Checkbox	Assign Role screen will display in traditional check box format (default value if tag is not present)
		ComboBox	Assign Role Screen will display Combo box of applicable roles (versus traditional checkbox format)
<MaintainRoles>	Defines the Roles to which the fields/validations apply.		
<Table>	Controls the display of results, formats results in a table.		
<Column>	Defines the format of the columns to be displayed on the specified table		
	WIDTH	Defines the column widths of the table and the number of characters that can be displayed in the specified column. Value is numeric.	
	ALIGN	Defines the alignment of how the information in the column is to be displayed	
		LEFT	
		CENTER	
		RIGHT	
	FORMAT	Defines the formatting that will be used to display information.	
		TEXT	Field value in text format
		CURRENCY	Field value as currency
		DATE	Field value as a date
<Display>			Field label that will be displayed on Assign Roles Screen
<Group>		The value used should be appropriate for the screen being configured. Only valid for Role or RoleField.	
<Name>	Field Name		
<Validation>	Allows configuration of edits and validations. Refer to the Transaction Configuration section of the Technical Manual for more information on the <Validation> element.		
<Expressions>	Expressions that will be evaluating onscreen values		
<Expression>	Standard expression format for on screen checking		

## AssignRoleScreen Image

Policy	Client	Inquiry	Batch	Tables	Rules	Administration	System																												
<div> <div> <b>Policies</b> <b>Splash Page</b> <b>Segments</b> <b>Roles</b> <b>Clients</b> <b>Activities</b> <b>Policy Values</b> </div> <div> <b>Company:</b> Acme Life  <b>Plan Group:</b> UL Plan Group  <b>Plan:</b> UL  <b>Entry Date:</b> 01/01/2005   <b>Search Name:</b> <input type="text"/>  <b>Policy Status:</b> Pending           </div> <div> <b>Issue State:</b> FL  <b>Policy Number:</b> UL30009119           </div> </div>																																			
<div> <b>Maintain Roles</b> </div> <div> <b>Roles:</b> Owner         </div> <table border="1"> <thead> <tr> <th>Name</th> <th>Role</th> <th>Tax ID</th> <th>RoleField</th> </tr> </thead> <tbody> <tr> <td>Age60, Over M.</td> <td>Owner</td> <td>882-30-0433</td> <td></td> </tr> </tbody> </table> <div> </div>								Name	Role	Tax ID	RoleField	Age60, Over M.	Owner	882-30-0433																					
Name	Role	Tax ID	RoleField																																
Age60, Over M.	Owner	882-30-0433																																	
<div> <b>Current Roles</b> </div> <div> <input checked="" type="checkbox"/> Active           <input type="checkbox"/> Deleted           <input type="checkbox"/> Expired         </div> <table border="1"> <thead> <tr> <th>Name</th> <th>Role</th> <th>RoleField</th> <th>Tax ID</th> </tr> </thead> <tbody> <tr> <td>59, Age</td> <td>Insured</td> <td></td> <td>908-76-5435</td> </tr> <tr> <td>Age60, Over M.</td> <td>Owner</td> <td></td> <td>882-30-0433</td> </tr> <tr> <td>59, Age</td> <td>Payer</td> <td></td> <td>908-76-5435</td> </tr> <tr> <td>AgentLookup, Bettie</td> <td>Primary Beneficiary</td> <td></td> <td>444-55-6789</td> </tr> <tr> <td>Agent, Tim</td> <td>Servicing Representative</td> <td></td> <td>888-88-8009</td> </tr> <tr> <td>Ale, Andrew</td> <td>Writing Agent</td> <td></td> <td>045-00-0036</td> </tr> </tbody> </table>								Name	Role	RoleField	Tax ID	59, Age	Insured		908-76-5435	Age60, Over M.	Owner		882-30-0433	59, Age	Payer		908-76-5435	AgentLookup, Bettie	Primary Beneficiary		444-55-6789	Agent, Tim	Servicing Representative		888-88-8009	Ale, Andrew	Writing Agent		045-00-0036
Name	Role	RoleField	Tax ID																																
59, Age	Insured		908-76-5435																																
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AgentLookup, Bettie	Primary Beneficiary		444-55-6789																																
Agent, Tim	Servicing Representative		888-88-8009																																
Ale, Andrew	Writing Agent		045-00-0036																																

## AssignRoleScreen Database Tables

Table Name	Description
AsAddress	Stores client address information: physical address, email, phone
AsAddressField	Stores address information organized by guaranteed user identification
AsAddressRole	Associates a client with an address. Clients may have several addresses of varying types and several clients may share the same address.
AsClient	Stores personal information about Clients
AsCode	Contains a listing and description of all valid codes and their values
AsRole	Contains role information

## XML Example:

```

<AssignRoleScreen>
  <RoleSelection>ComboBox</RoleSelection>
  <MaintainRoles>
    <Table>
      <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
        <Display>Name</Display>
        <Group>Client</Group>
        <Name>Name</Name>
      </Column>
      <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
        <Display>Role</Display>
        <Group>Role</Group>
        <Name>RoleCode</Name>
      </Column>
      <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
        <Display>Tax ID</Display>
        <Group>Client</Group>
        <Name>TaxId</Name>
      </Column>
      <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text" EDITABLE="Yes">
    
```

```

        <Display>RoleField</Display>
        <Group>RoleField</Group>
        <Name>Field1</Name>
    </Column>
</Table>
</MaintainRoles>
<CurrentRoles>
    <DisplayStatus>
        <Status>Active</Status>
        <Status>Deleted</Status>
        <Status>Expired</Status>
    </DisplayStatus>
    <Table>
        <Column WIDTH="160" ALIGN="LEFT" FORMAT="Text">
            <Display>Name</Display>
            <Group>Client</Group>
            <Name>Name</Name>
        </Column>
        <Column WIDTH="160" ALIGN="LEFT" FORMAT="Text">
            <Display>Role</Display>
            <Group>Role</Group>
            <Name>RoleCode</Name>
        </Column>
        <Column WIDTH="160" ALIGN="LEFT" FORMAT="Text">
            <Display>RoleField</Display>
            <Group>RoleField</Group>
            <Name>Field1</Name>
        </Column>
        <Column WIDTH="160" ALIGN="LEFT" FORMAT="Text">
            <Display>Tax ID</Display>
            <Group>Client</Group>
            <Name>TaxId</Name>
        </Column>
    </Table>
</CurrentRoles>
</AssignRoleScreen>

```

## 12. AsynchronousActivity

### Description

This business rule helps control the status of error handling of asynchronous activities at the plan level. These are activities that start an external process and may want other succeeding activities to be processed.

### AsynchronousActivity Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType	
<AsynchronousActivity> </AsynchronousActivity>	Required parent element that indicates the opening and closing of the business rule.	
	ACTION	SystemError
	TYPE	SQL
<TimeoutSeconds>	The opening and closing tag of the TimeoutSeconds tag.	
	ACTION	SystemError
	TYPE	SQL
<CheckSuccess>	The opening and closing tag of CheckSuccess tag.	
	ACTION	SystemError
	TYPE	SQL
<Query>	A valid SQL statement.	
<CheckError>	The opening and closing tag of the CheckError Tag.	

	ACTION	SystemError
	TYPE	SQL

## AsynchronousActivity Database Tables

Table Name	Description
AsActivity	Stores instance date of policy activities
AsActivityField	Stores field names and values relating to Activities

## XML Example

```
<AsynchronousActivity>
  <TimeoutSeconds ACTION="SystemError">900000</TimeoutSeconds>
  <CheckError ACTION="SystemError" TYPE="SQL">
    <Query>SELECT count(*) from AsActivityField where ActivityGUID = '[ActivityGUID]' and FieldName =
      'PROCESSINGSTATE' and textValue = 'ERRORED' WITH UR</Query>
  </CheckError>
  <CheckSuccess TYPE="SQL">
    <Query>SELECT count(*) from AsActivityField where ActivityGUID = '[ActivityGUID]' and FieldName =
      'PROCESSINGSTATE' and textValue = 'COMPLETED' WITH UR</Query>
  </CheckSuccess>
</AsynchronousActivity>
```

## 13. AutoProcessRule

### Description

This Business Rule dictates whether Activities are to be processed as soon as they are added or when specifically executed. If set to Yes, the AutoProcess button will be checked on the Activity Screen.

### AutoProcessRule Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<AutoProcess> </AutoProcess>	Required parent element signifying the opening and closing of the business rule.		
		Yes	Auto Process button will be populated on activity screen. Activities will process as soon as the 'OK' button is selected at Activity entry.
		No	Auto Process button is not pre-populated but can be manually selected.
		String	
<PlanLevel>		String	
<ActivityLevel>		String	



## AutoProcessRule Screen Image

The screenshot shows the 'AutoProcessRule' screen. At the top, it says 'Activity' and 'Page 1 of 1'. There is a 'Maximum Results' dropdown set to '100'. Below this, there is a section for 'Activity' with a dropdown menu showing 'DeathNotification', an 'Add' button, and a checked 'Auto-Process' checkbox with a 'Process' button. The main part of the screen is a table with the following data:

Activity(4)	Activity Date	Status	Amount	Attachments	Action
COIPayment	09/19/2030	Pending			
Issue	09/19/2030	Active			
Premium	09/19/2030	Active	\$5,735.00		
CoverageCalculation	09/19/2030	Active			

## XML Example

<AutoProcess>Yes</AutoProcess>

## 14. AutomaticPolicyNumber

### Description

This business rule generates the PolicyNumber when a new policy is stored. In order for this functionality to be invoked the <AutomaticPolicyNumber> tag should be set to Yes in the PolicyScreen business rule.

### AutomaticPolicyNumber Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<AutomaticPolicyNumber> </AutomaticPolicyNumber>	The opening and closing elements of this business rule.		
	USEGHOSTED	Yes	Will check for policies that have been shadowed, status 12, and reuse them if they are of the same plan. Policies that have been deleted or shadowed are eligible for reuse.
		No	Will not perform a check.
<Part>	Indicates the value of the field parts to define and format the Policy Number.		
	TYPE	Indicates the value of the field type to build and format a Policy Number.	
		VALUE	Defines that it is a set value and defines what value will be in the policynumber.
		SYSTEMDATE	Indicates that a portion of the current date will be used in the creation of the policynumber. Used in conjunction with the FORMAT attribute.
		FIELD	Defines that a value from a field will be used in the policynumber.
		SEQUENCE	AsSequence Name, the value of the table is inserted according to number of digits specified in the FORMAT attribute.

	FORMAT	Indicates the formatting to be performed on the type attributes.	
		MM	Used to indicate that the current month number should be used.
		YY	Used to indicate that the last two digits of the current year should be used.
		DD	Used to indicate that the current day number should be used.
		'0xxxxx'-	Used to indicate the number of places that the sequence number should be generated to.
	LEFT	LEFT=n	Formats field value to left most n digit.
	RIGHT	RIGHT=n	Formats field value to the right n digits.
	MID	MID=m,n	Formats field value to middle digits m,n. It's a comma separated string of two numbers specifying the starting and ending index of the characters to be picked up for the part.

## XML Example

```

<AutomaticPolicyNumber>MLA000102</AutomaticPolicyNumber>

<AutomaticPolicyNumber USEGHOSTED="Yes">WU0000102</AutomaticPolicyNumber>

<AutomaticPolicyNumber>
  <Part TYPE="VALUE">AVA</Part>
  <Part TYPE="SYSTEMDATE" FORMAT="YY"></Part>
  <Part TYPE="FIELD">StatutoryCompany</Part>
  <Part TYPE="SEQUENCE" FORMAT="000000">PolicyNumber</Part>
</AutomaticPolicyNumber>

```

Builds a policy number similar to this format AVA043000001

## 15. BatchActivitySearchScreen

### Description

This Business Rule allows configuration of the BatchActivitySearchScreen and defines the fields to store the results of the search. The Batch Search Criteria screen is accessible from the Batch option listed on the taskbar on the OIPA main screen and menu.

### BatchActivitySearchScreen Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Option
<BatchActivitySearchScreen> </BatchActivitySearchScreen>	Required parent elements that indicate the opening and closing of this business rule.
<Batch Name>	Child element defining a specific section of the screen and the layout/format of all associated fields to be displayed.
<Search>	Indicates and defines search criteria and the fields to be included as part of the batch activity search.
<FixedFields>	Dynamically changes labels on the 'above the line' fixed fields.

<Fields>	Allows configuration of dynamic fields. Press <Fields> link for additional information on the <Fields> Element configuration.	
<DynamicFields>	Dynamically changes labels on the 'configured' fields.	
<Fields>	Allows configuration of dynamic fields. Press <Fields> link for additional information on the <Fields> Element configuration.	
<Results>	String	This element provides the return of the search and the data in the Results override the fixed fields.
<Table>	Defines the table that describes the attributes of the non-configurable fields to be included on the specified table.	
<Column>	Defines the format of the columns to be displayed on the specified table	
	WIDTH	Defines the column widths of the table and the number of characters that can be displayed in the specified column. Value is numeric.
	ALIGN	Defines the alignment of how the information in the column is to be displayed
		"LEFT"
		"CENTER"
		"RIGHT"

## BatchActivitySearchScreen Image

Batch

Batch Number: \_\_\_\_\_ Status: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Effective Date: 07/15/2096

Save New Find Close

Search Criteria

Batch Number \_\_\_\_\_ Policy Number \_\_\_\_\_

Effective Date \_\_\_\_\_ Status Code \_\_\_\_\_

Billing Date \_\_\_\_\_ Transaction ABSWA1

Find Close

Search Results

Page 1 of 3 Page 1 2 3 Maximum Results: 10

Batch Number	Status Code	Transaction	Billing Date Start	Billing Date End
1106200600000003	Pending			
1106200600000002	Pending			
1106200600000001	Pending			
1025200600000005	Released			
1025200600000004	Pending			
1025200600000003	Pending			
1025200600000002	Pending			
1025200600000001	Pending			
1024200600000002	Pending			
1024200600000001	Pending			

## Database Tables for BatchActivitySearchScreen

Table Name	Description
AsBatch	Contains the batch numbers of batch transactions that are in pending status or have been released
AsBatchActivity	Stores activities processed via batch transactions.
AsBatchScreen	Stores data related to other miscellaneous screens with activities processed via batch
AsCode	Stores a list of all OIPA codes and their related descriptions
AsPolicy	Stores key data related to Policies
AsTransaction	Contains transaction details and XML that drives the transaction

## XML Example

```

<BatchActivitySearchScreen>
  <Batch NAME="Address">
    <Search>
      <FixedFields>
        <Field>
          <Name>BatchNumber</Name>
          <Display>Batch Number</Display>
          <DataType>Text</DataType>
        </Field>
        <Field>
          <Name>PolicyNumber</Name>
          <Display>Policy Number</Display>
          <DataType>Text</DataType>
        </Field>
        <Field>
          <Name>EffectiveDate</Name>
          <Display>Effective Date</Display>
          <DataType>Text</DataType>
        </Field>
      </FixedFields>
      <DynamicFields>
        <Field>AccountType</Field>
      </DynamicFields>
    </Search>
    <Results>
      <FixedFields>
        <Field>IssueStateCode</Field>
        <Field>PlanDate</Field>
        <Field>CreationDate</Field>
      </FixedFields>
      <DynamicFields>
        <Field>AppSignDate</Field>
        <Field>Gender</Field>
      </DynamicFields>
    </Results>
  </Batch>
</BatchActivitySearchScreen>

```

## 16. BonusOnInterestPeriod

### Description

Provides the period and start date SQL for the fund that calculates bonus on the interest amount.

### BonusOnInterestPeriod Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<BonusOnInterestPeriod> </BonusOnInterestPeriod>	The opening and closing elements of this business rule. Required.

<Period>	String	MathVariable defining Period duration.
<BonusStartDate>	String	MathVariable defining Start Date of Bonus.

## XML Example

```
<BonusOnInterestPeriod>
  <Period>String</Period>
  <BonusStartDate>String</BonusStartDate>
</BonusOnInterestPeriod>
```

# 17. BuildDocument

## Description

This Business Rule allows configuration of the BuildDocument Business Rule.

### BuildDocument Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<BuildDocument> </BuildDocument>	The opening and closing elements of the BuildDocument business rule. Required.	
<TemplatesList>		
<Templates>	NAME	Name of the template.
	TYPE	Type of the template.
<MailDocument>	Start of the section listing Mail document columns and fields.	
<To>	To email address	
<From>	From email address	
<Subject>	Subject line	
<Body>	Template body	

# 18. CalculateGeneral

## Description

This business rule calculates various Segment and Policy values. When a segment is calculated, the math configured in this business rule takes into account various aspects of the policy and arrives at the values, which are critical to the policy. There is configuration in the SegmentName rule which determines which 'Calculate' rule is invoked. The name of the rule can vary, but the parent element '<Calculate>' identifies the rule as a 'Calculate' rule.

### CalculateGeneral Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType
<Calculate> </Calculate>	Required parent element signifying the opening and closing of the business rule.
<Input>	Identifies the Input or values that will be used for calculations
<MathVariables>	The <a href="#">Appendix 2- Transaction Configuration</a> document contains further information about the <MathVariables> element and the available options.

<MathIF>	Indicates conditions within the math calculation and provides reference value for the Math Field in the output.		
<Validation>	The <a href="#">Appendix 2 – Transaction Configuration</a> document contains further information about the <Validation> element and the available options. Note, only the <Expression> section of <Validation> tag is applicable to 'Calculate' rules		
<Output>	Identifies the values that were calculated and will be written to Policy or Segment records.		
<Mappings>	Starting tag to identifies which MathVariable will be mapped		
<Mapping>	Identifies the MathVariable that will be copied to the Policy or Segment table. The value is the MathVariable used in the 'Calculate' Rule.		
	OUTPUTNAME	String	Defines the name of the Policy or Segment Field that will be updated.
	TYPE	String	Defines field type and value for calculation
	GROUP	String	Defines Policy Segment FIELD type mappings. CalculateGeneral output values are saved to AsRoleField.
	ROLEGUID	String	Defines the single role guid FIELD and assigns the role for output saved field.
	ROLEGUIDARRAY	Array	Defines the array of Role GUID.
<GeneratePendingRequirements>	DEFAULT	String	Defines the default value to be set for the output.
	Indicates if Requirements are generated when rule is calculated.		
		Yes	Generate pending requirements for calculation.
		No	Pending Requirements are not generated.

## XML Example

```

<Calculate>
  <Input>
    <MathVariables>
      <MathVariable VARIABLENAME="Checked" TYPE="VALUE">CHECKED</MathVariable>
      <MathVariable VARIABLENAME="Unchecked" TYPE="VALUE"></MathVariable>
      <MathVariable VARIABLENAME="IssueStateCode"
TYPE="FIELD">Policy:IssueStateCode</MathVariable>
      <MathVariable VARIABLENAME="QualorNonQual"
TYPE="POLICYFIELD">QualNonQual</MathVariable>
      <MathVariable VARIABLENAME="SegGUID"
TYPE="SEGMENTFIELD">SegmentGUID</MathVariable>
      <MathVariable VARIABLENAME="RoleGUID" TYPE="NUMERICARRAY" OPERATION="FILLBY-
SQL">SELECT RoleGUID FROM AsRole WHERE SegmentGUID = '[SegGUID]' AND RoleCode =
'13'</MathVariable>
      <MathIF IF="UnisexIndicator = 'CHECKED'">
        <MathVariable VARIABLENAME="RateGender" TYPE="VALUE">01</MathVariable>
      </MathIF>
      <MathIF IF="UnisexIndicator &lt;&gt; 'CHECKED'">

```

```

        <MathVariable VARIABLENAME="RateGender" TYPE="SQL">SELECT TextValue FROM
        AsRoleField WHERE RoleGUID = '[RoleGUID]' AND FieldName =
        'RelationshipToInsured'</MathVariable>
    </MathIF>
</MathVariables>
</Input>
<Validation>
    <Expression TYPE="ErrorOnTrue" MESSAGE="Future Allocations are missing">FutureAllocationExists &lt;=
0</Expression>
    <Expression TYPE="ErrorOnTrue" MESSAGE="EFT is not allowed on Qualified Contracts">QualorNonQual = 01
And AAB = Yes</Expression>
    <Expression TYPE="ErrorOnTrue" MESSAGE="EFT Allocations are missing">AABAllocationExists &lt;= 0 And
AAB = Yes</Expression>
</Validation>
<Output>
    <Mappings>
        <Mapping OUTPUTNAME="AnnuitizationDate" TYPE="FIELD"
GROUP="Segment">AnnuitizationDate</Mapping>
        <Mapping OUTPUTNAME="MaturityDate" TYPE="FIELD"
GROUP="Segment">MaturityDate</Mapping>
        <Mapping OUTPUTNAME="SWPEndDate" TYPE="FIELD"
GROUP="Segment">MaturityDate</Mapping>
        <Mapping OUTPUTNAME="AnnuitizationAge" TYPE="FIELD"...
GROUP="Segment">AnnuitantAgeAtAnnuitization</Mapping>
        <Mapping OUTPUTNAME="SomeRoleField" TYPE="FIELD" GROUP="Role"...
ROLEGUID="SomeRoleGuid">InitialPremiumCycleDate</Mapping>
    </Mappings>
</Output>
<GeneratePendingRequirements>No</GeneratePendingRequirements>
</Calculate>

```

## 19. CalculateInterestAmount Rule

### Description

This Business Rule allows an Activity to calculate interest and place it in a math variable. The CalculateInterestAmount rule is governed by the InterestRateCode business rule package and is performed at the transaction level (Free Look Refund, Proof Of Death, etc.).

### CalculateInterestAmount Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<CalculateInterestAmount> </CalculateInterestAmount>	Required parent element signifying the opening and closing of the business rule. The transaction description dictates the interest amount calculation.		
	DEFINITION	String	Defines the function being performed.
	VALUEDEFINITION	Defines the value of the result returned from the function.	
		ValuePlusInterest	The value of the result returned for the interest calculated over a <i>Free Look Refund</i> transaction.
		DeathInterest	The value of the result returned for the interest calculated over a <i>Proof Of Death</i> transaction.
<EffectiveDate>		String	Variable name of the Date to be used
<InterestRate>	String or Decimal. If String Variable name of the data to be used		

		Numeric	Indicates the numeric value used to perform the interest calculation.
		VariableName	Defines the value of the variable name used to perform the interest calculation.
<MoneysAndDates>		Defines the standard query tag that defines the parameters and/or variables to be used to query specified databases and/or tables to return specific results.	

### XML Example

```
<CalculateInterestAmount DEFINITION="InterestCalculated" VALUEDEFINITION="ValuePlusInterest">
  <EffectiveDate>Activity:EffectiveDate</EffectiveDate>
  <InterestRate>InterestRate</InterestRate>
  <MoneysAndDates>SELECT AsValuation.ValuationAmount, AsActivity.Effective FROM
... '01'</MoneysAndDates>
</CalculateInterestAmount>
```

## 20. CalculatePolicyWeight

### Description

ONLY FOR BACKWARD COMPATIBILITY. Provides the policy fields that hold the policy weight for weighted UV calculated by the base system. This functionality will be discontinued.

### BonusOnInterestPeriod Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
< CalculatePolicyWeight > </ CalculatePolicyWeight >	The opening and closing elements of this business rule. Required.
<PolicyField>	PolicyField value that determines the weight   String

### XML Example

```
<CalculatePolicyWeight>
  <PolicyField>String</PolicyField>
</CalculatePolicyWeight>
```

## 21. ChartOfAccountsResults

### Description

Used to write results to AsAccountingDetailField table. This additional information is client specific and is used for various accounting purposes. In addition, this business rule is also used to override the default Account Number with specific Account Number format.

### ChartOfAccountsResults Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<ChartOfAccountsResults> </ChartOfAccountsResults>	The opening and closing elements of the ChartOfAccountsResults business rule.
<TransactionAccounting>	Describes how to get value to write to Accounting Record. Required, repeatable element.



<Result>	Describes how to get value to write to Accounting Record. Required, repeatable tag.		
	NAME	String	Name of the result.
	DISPLAY	String	Display name for results.
	CATEGORY	POLICY	To retrieve the value from AsPolicy and AsPolicyField. Any Field from the Policy screen.
		FUND	To allow values defined in AsFund and AsFundField to be used as the result. Any Field/MathVariable from Fund screen.
		MATH	To retrieve the value from the Transaction. Any MathVariable or ActivityField.
		VALUE	To specify the hard coded value as the result.
		MAP	Lets User pick values from a set of values based on a set of criteria. Values are taken from AsMapGroup, AsMapCriteria and AsMapValue.
<MapCriteria>	CATEGORYFIELD	String	Name of field or mathvariable to use as the value of the Accounting Field and the Parts of Account Number Format <b>Note:</b> For CATEGORY="VALUE", the hardcoded values are mentioned in the CATEGORYFIELD attribute  For CATEGORY="MAP," the name of the Map is mentioned in the CATEGORYFIELD attribute.
	Describes how to match a single criteria value in a map when the CATEGORY is set to MAP. Can have as many of these elements as needed to match a value in the map table <b>Note:</b> Only applicable when CATEGORY is set to MAP.		
	NAME	String	Name of the map criteria to match.
	CATEGORY	POLICY	To retrieve the value from AsPolicy and AsPolicyField. Any Field from the Policy screen.
		PLAN	To retrieve values from AsPlan and AsPlanField.
		FUND	To allow values defined in AsFund and AsFundField to be used as the result. Any Field/MathVariable from Fund screen.
		COA	To retrieve the value from

			ChartOfAccountsScreen. Account Number defined for Entry.
		MATH	Any MathVariable or ActivityField.
	CATEGORYFIELD	String	Name of the field or mathvariable to use as the value of the accounting field.
	WILDCARD	String	Wildcard value that can optionally be used to ignore the criteria value for map value being searched.
<SuspenseAccounting>	Describes results that can be written for Suspense Accounting in AsAccountingDetailField table.		
<Result>	Describes how to get value to write to Accounting Record. Required, repeatable tag.		
	NAME	String	Name of the result.
	DISPLAY	String	Display name for results.
	CATEGORY  <b>Note:</b> It is recommended not to use type Sql if possible	SUSPENSE	Retrieve the value from AsSuspense and AsSuspenseField. Any Field from the Suspense screen.
		VALUE	To specify the hard coded value as the result.
		SQL	Retrieve the value from the SQL statement. SQL attribute must be present for this.
		MAP	Lets User pick values from a set of values based on a set of criteria. Values are taken from AsMapGroup, AsMapCriteria and AsMapValue.
	CATEGORYFIELD	String	Name of field or mathvariable to use as the value of the Accounting Field and the Parts of Account Number Format <b>Note:</b> For CATEGORY="VALUE", the hardcoded values are mentioned in the CATEGORYFIELD attribute  For CATEGORY="MAP," the name of the Map is mentioned in the CATEGORYFIELD attribute.
	SQL	SQL Stmt	SQL Statement from which the values should be retrieved.
<MapCriteria>	Describes how to match a single criteria value in a map when the CATEGORY is set to MAP. Can have as many of these elements as needed to match a value in the map table <b>Note:</b> Only applicable when CATEGORY is set to MAP.		
	NAME	String	Name of the criteria value in the map to match on.
	CATEGORY	SUSPENSE	Retrieve the value from AsSuspense and

			AsSuspenseField. Any Field from the Suspense screen.	
		COA	Retrieve the value from ChartOfAccountsScreen. Account Number defined for Entry.	
		CATEGORYFIELD	String	Name of the field from CATEGORY attribute to use.
		WILDCARD	String	Wildcard value that can optionally be used to ignore the criteria value for the map value being searched.
<AccountNumberFormats>	Lists the account number formats that are available to the COA entries. Defines the account number format using the Parts syntax. The actual codes are defined in the AsMap table.			
<AccountNumberFormat>	NAME	String	Name to reference the AccountNumberFormat as.	
<Parts>	List of parts that together form the account number.			
<Part>	Describes how to get each part of the account number. The text of this tag should be set to the name of the field from where the Part should take the value.			
		String	Any Category Field.	
	TYPE	COA	Retrieve value from the ChartOfAccounts screen's Transaction/Account Selection section. Account Number defined for Entry.	
		RESULT	Retrieve value from the ChartOfAccounts screen's Results section.	

## 22. ChartOfAccountsScreen

### Description

This Business Rule drives how the dynamic fields can be set up for Chart of accounts screen (only for the criteria section) and how validation can be performed.

### ChartOfAccountsScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<ChartOfAccountsScreen> </ChartOfAccountsScreen >	The required opening and closing elements of this business rule.
<TransactionAccounting>	Accounting detail for transactions. The <Fields> element will be used as criteria to match a debit or credit on an account.
<Fields>	Allows configuration of dynamic fields. Fields that will be used as criteria to match a debit/credit on an account.
<SuspenseAccounting>	Accounting detail for suspense. The <Fields> element will be used as criteria to match a debit or credit on an account.
<Fields>	Allows configuration of dynamic fields. Fields that will be used as criteria to match a debit/credit on an account.
<Validation>	Refer to the Transaction Configuration section of the Technical Manual for more information on <Validation> Element and available options.

## ChartOfAccounts Screen Images

ChartOfAccounts

Company: Acme Life

View by: ☒ Transaction ☐ Account

Refresh Close

Transactions / Suspense

View: ☒ Transaction ☐ Suspense

Page 1 of 1 Page 1 Maximum Results: 20

Transaction	0
PreActivationPremium	
TestTransaction	
suspense	

Available Transactions: ABSWA1

New Save

Accounts

Page 1 of 1 Page 1 Maximum Results: 20

Account	Description	0
2100000	Testing QA	

Account Number: 2100000

Account Description: Testing QA

New Save

**Entries**

Page 1 of 1      Page 1      Maximum Results: 20

Debit/Credit	Description	Type	G/L	Flip	0
Credit		Math/Variable	No	No	

**Entry Detail**

Account Number: None  
Format: None

Effective From Date: 07/15/2096      Effective To Date:

Description:

Debit/Credit: Credit      Gain/Loss: ☐

Type: By Fund      Flip On Negative: ☐

Accounting Amount:      Fund Type: All Fund Types

Transaction Money Type(s):  
 1035 Exchange  
 ADD Rider Charge  
 ALL  
 Admin Fee  
 Annual Contract Fee

Selected Money Type(s):

Original Disbursement Status: Pending      Do Reversal Accounting: ☐

Forward Accounting Status: Active      Reversal Accounting Status: Active

New      Save

**Criteria**

Company: All

**Results**

## Database Tables for ChartofAccountsScreen

Table Name	Description
AsChartOfAccounts	General Ledger chart of accounts
AsChartOfAccountsField	Stores field names and values relating to a Chart of Accounts
AsChartOfAccountsTemp	Stores temporary General Ledger chart of accounts
AsAccountingDetail	Contains the debits and credits stored as result of the activities and suspense.
AsAccountingDetailField	Stores field names and values relating to Accounting Details
AsCode	Stores a list of all OIPA codes and their related descriptions
AsCompany	Contains names of all companies defined to the system
AsSuspense	Holding area for money transactions
AsTransaction	Contains transaction details and XML that drives the transaction

## XML Example

```

<ChartOfAccountsScreen>
  <TransactionAccounting>
    <Fields>
      <Field>
        <Name>PerformIntercompanyAccounting</Name>
        <Display>Intercompany</Display>
        <DataType>Combo</DataType>
        <Query TYPE="FIXED">
          <Options>
            <Option>
            </Option>
          </Options>
        </Query>
      </Field>
    </Fields>
  </TransactionAccounting>
</ChartOfAccountsScreen>

```

```

        </Options>
      </Query>
    </Field>
  </Field>
  <Name>COARenewalPremiumIndicator</Name>
  <Display>Renewal Premium</Display>
  <DataType>Combo</DataType>
  <Query TYPE="FIXED">
    <Options>
      <Option>
      </Option>
    </Options>
  </Query>
</Field>
</Fields>
</TransactionAccounting>
</SuspenseAccounting>
</Fields>
<Field>
  <Name>NBCIndicator</Name>
  <Display>NBCIndicator</Display>
  <DataType>Combo</DataType>
  <Query TYPE="FIXED">
    <Options>
      <Option>
      </Option>
    </Options>
  </Query>
</Field>
</Fields>
</SuspenseAccounting>
</ChartOfAccountsScreen>

```

## 23. CheckEFTInformation

### Description

This Business Rule provides information about the criteria for checking and loading the electronic funds transfer (EFT) information for a Policy, Role, or Client. This Rule is invoked if the Element <CheckEFTInformation> is set to "Yes" in the Disbursement Transaction configuration.

### CheckEFTInformation Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType		
<CheckEFTInformation> </CheckEFTInformation>	Required element indicating the opening and closing of the business rule tag that defines the process for checking EFT information.		
<DefaultDisbursementType>	Tag defining the default value for the disbursement type.		
	NAME	Code (as defined in AsCodeDisbursementType)	Defines the name default method for creating disbursements. This name should correspond to the description of the DisbursementType code value.
<EFTDisbursementType>	Tag defining the default value for the disbursement type		

	NAME	Code (as defined in AsCodeDisbursementType)	Defines the name of the EFT method for creating disbursements. This name should correspond to the description of the DisbursementType code value.
<Validation>	Allows configuration of edits and validations.		
<PolicyFields>	Specifies the associated Policy information to be used to process the EFT transaction.		
<Field>	Specifies the name and value of the field indicating that an EFT disbursement is to be processed. <Field> is applicable to PolicyFields, ClientFields, AddressFields.		
	TYPE	EqualToValue NotEmpty	
	NAME	String	FieldName
<ClientFields>	Specifies the associated Client information to be used to process the EFT transaction.		
<Field>	Specifies the name and value of the field indicating that an EFT disbursement is to be processed. <Field> is applicable to PolicyFields, ClientFields, AddressFields.		
	TYPE	EqualToValue NotEmpty	
	NAME	String	FieldName
<AddressFields>	Specifies the associated Address information to be used to process the EFT transaction.		
	ADDRESSROLE	Address Role Code	
<Field>	Specifies the name and value of the field indicating that an EFT disbursement is to be processed. <Field> is applicable to PolicyFields, ClientFields, AddressFields.		
	TYPE	EqualToValue NotEmpty	
	NAME	String	FieldName

## XML Example

```

<CheckEFTInformation>
  <DefaultDisbursementType NAME="Check">01</DefaultDisbursementType>
  <EFTDisbursementType NAME="ACH">03</EFTDisbursementType>
  <Validation>
    <PolicyFields>
      <Field TYPE="EqualToValue" NAME="EFTIndicator">1</Field>
    </PolicyFields>
    <ClientFields>
      <Field TYPE="EqualToValue" NAME="EFTIndicator">CHECKED</Field>
    </ClientFields>
    <AddressFields ADDRESSROLE="01">
      <Field TYPE="NotEmpty" NAME="AccountNumber"></Field>
      <Field TYPE="NotEmpty" NAME="RoutingNumber"></Field>
      <Field TYPE="NotEmpty" NAME="BankName"></Field>
    </AddressFields>
  </Validation>
</CheckEFTInformation>

```

## 24. ChildFundScreen

### Description

Parent and child funds are used when the same fund may be offered but there are different classes of the fund (versions, bands, groups, etc.). The Child Fund screen is used to establish Parent/Child relationships by creating the "Generate Child Fund" link available on the Fund screen. When selected, this link opens up the Child Fund screen directly under the Fund screen not only to create associations between parent funds and child funds but the parent and child fund names concatenated in the Child Fund drop-down box. This business rule should be a Plan level override and should be used to control the Fund Types listed on the Child Fund screen and the display of MultiFields on the Child Fund screen.

### ChildFundScreen Element\Attribute Table.

Element\Tag	Attribute\Definition\Value\DataType		
<ChildFundScreen> </ChildFundScreen>	The required opening and closing elements of this business rule.		
<ChildFunds>	Used to display "Generate Child Fund" link on the Fund Screen.		
	ALLOWED	String	The "Allowed" attribute of the <ChildFunds> tag turns on and off the display of " <b>Generate Child Fund</b> " link on the Fund Screen. Upon clicking on this link, the child fund screen is directly displayed under the Fund screen.
		Yes	Indicates that the " <b>Generate Child Fund</b> " link should be displayed on the Fund Screen.
		No	Indicates that the " <b>Generate Child Fund</b> " link should NOT be displayed on the Fund Screen.
<Fund>	To indicate the Fund that needs to be associated as the Child Fund to the Parent Fund.		
		Yes	Indicates that the " <b>Generate Child Fund</b> " link should be displayed for the specified Fund Type mentioned in the 'TYPE' attribute.
		No	Indicates that the " <b>Generate Child Fund</b> " link should not be displayed for the specified Fund Type mentioned in the 'TYPE' attribute.
	TYPE	NN	Where "NN" is the Fund Type Code for which Parent/Child relationship should be set-up. The Fund Type Code is defined in AsCode=> AsCodeFundType table <b>Ex:</b> "01" (Fixed Fund) "02" (Variable Fund) "03" (ABL Fund)
<Fields>	The <a href="#">Appendix 2 – Transaction Configuration</a> document contains further information about the <Fields> element and the available options.		
<FixedFields>	Refer to the Transaction Configuration section of the Technical Manual for more information about the <FixedFields> Element and its available options.		
<MultiFields>	MultiFields enables and allows screen transaction configuration with multiple sets of dynamic field values on various screens. The yes/No element values can be used to turn On/Off the multifields section on ChildFundScreen. This statement can occur in any part of the Transaction XML.		
		Yes	Enables the MultiField Business Rule (turns on) and



			if set to "Yes" Multi Fields should be generated on the ChildFundScreen.
		No	Defaults and disables the Multifield Business Rule (turns off) and if set to "No" Multi Fields should not be generated on the ChildFundScreen.
	RULE	<p>This attribute defines the specific MultiFields business rule name. The &lt;MultiFields RULE=&gt; expression initiates the MultiFields Business Rule activity. The MultiFields business rule which is defined in the "RULE" attribute defines the Multi Fields screen configuration, defines the components within the multiple sets of elements, and applies functionality to the screen transactions.</p> <p><b>Ex:</b> &lt;MultiFields RULE="MultiFields-ChildFundScreen"&gt;Yes/No&lt;/MultiFields&gt;</p>	

## ChildFundScreen Image

The screenshot displays the 'ChildFundScreen' configuration interface. It is divided into two main sections: 'Fund(s)' and 'Child Fund(s)'. Both sections contain a list of configuration items with details such as Name, Type, Effective Date, Status Code, Removal Precedence, Account Code, Account Type Code, Redemption Fee, and GL Fund Code. The 'Fund(s)' section shows 'Aggressive Growth' (9055 - FILI) with a status of 'Active'. The 'Child Fund(s)' section shows 'Aggressive Growth' (9055- AIR 3.5 - FILI - AIR=3.5) with a status of 'Active'. Buttons for 'Rules', 'Save', 'New', and 'Close' are located between the two sections.

## Database Tables for ChildFundScreen

Table Name	Description
AsFund	Contains the names of the fixed and variable funds
AsFundClass	Stores the Fund Series information
AsFundClassAllocation	Defines the allocation methods of groups of funds
AsFundFamily	Groups funds and fund classes together
AsFundField	Stores Field names and values related to Funds
AsFundGroup	Defines relationships between funds
AsFundStatus	Stores the status of all Funds in the system

AsFundWeight	Relative weights of funds
AsCode	Stores a list of all OIPA codes and their related descriptions

## XML Example

```
<ChildFundScreen>
  <ChildFunds ALLOWED="Yes">
    <Fund TYPE="02">Yes</Fund>
    <Fund TYPE="04">Yes</Fund>
  </ChildFunds>
  <Fields></Fields>
</ChildFundScreen>
```

## 25. ClientActivityScreen

### Description

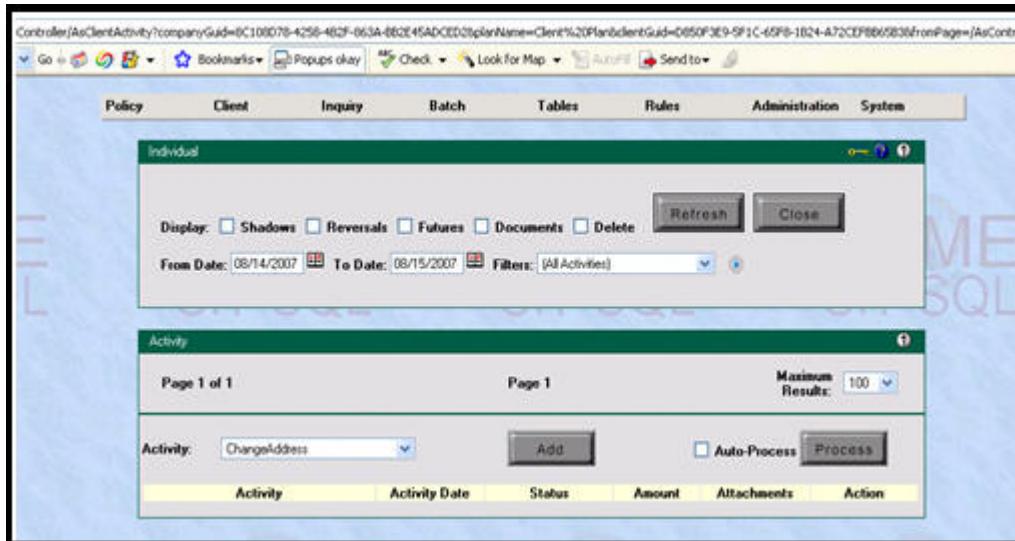
This Business Rule allows control of aspects of the Client Level Activity Screen. This configuration will determine the number of activities that will be shown on the Client-Level Activity Screen, set the date from which to display activities and can be configured to display additional Fields as well as provide warnings and/or restrictions to processing Client Level Activities.

### ClientActivityScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Option		
<ClientActivityScreen> </ClientActivityScreen>	The opening and closing elements of the ClientActivityScreen business rule. Required.		
<MaximumRows>	Defines the maximum number of Activities that will display on each page of the ClientActivityScreen.		
		Intege	Valid values are 5, 10, 15, 20, 100 If this element is not present or there is an illegal value (non-integer) the default is 100.
<From Date>  <b>Note: If element is not present, default is System date.</b>	Defines the From Date field as the start date the user wants to display Activities from.		
		BeginningOfYear	Displays beginning of the year based upon current system date.
		BeginningOfMonth	Displays beginning of the month based upon current system date.
		PreviousDay	Displays previous day of system date.
		Blank	Displays blank value.
<Fields>	This element represents an input control that will accept input from the user or the system. The <a href="#">Appendix 2 – Transaction Configuration</a> document contains further information about the <Fields> element and the available options.		

<Warnings>	<p>Defines the warnings node. Warning messages are defined via business rules and are optional. They may exist at the Screen Rule level or at the Transaction Cosmetics Rule level. Warnings defined in the Transaction Cosmetic Rule take priority over the Screen Rule.</p> <p><b>Note:</b> If this element does not exist, then the default will be not to display any confirmation warning message.</p>		
<DeleteWarning>	<p>Controls if a warning is given when an Activity is Deleted.</p> <p><b>Note:</b> Alerts the user with a confirmation warning message for the Delete button click action to prevent the user from inadvertently deleting a pending Activity.</p>		
	MESSAGE	String	Message text. <b>Note:</b> If a message is not specified, the default message is, "Are you sure?"
<ReverseWarning>	<p>Controls if warning is given when Activity is Reversed.</p> <p><b>Note:</b> Alerts the user with a confirmation warning message for the Reverse button click action to prevent the user from inadvertently reversing an active Activity.</p>		
	MESSAGE	String	Message text. <b>Note:</b> If a message is not specified, the default message is, "Are you sure?"
<RecycleWarning>	<p>Controls if warning is given when Activity is Recycled. If Tag is not present no warning will be displayed.</p> <p><b>Note:</b> Alerts the user with a confirmation warning message for the Recycle button click action to prevent the user from inadvertently recycling an active Activity.</p>		
	MESSAGE	String	Message text. <b>Note:</b> If a message is not specified, the default message is, "Are you sure?"

## ClientActivityScreen Image



## XML Example

```
<ClientActivityScreen>
  <FromDate>Blank</FromDate>
</ClientActivityScreen>
```

## 26. ClientChangeAction

### Description

This rule generates activities based on updates to Client records. The activity will be generated as a client level activity when the user presses the Save button on the Client or Address screen.

### ClientChangeAction Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
< ClientChangeAction> </ClientChangeAction >	The opening and closing tag of the ClientChangeAction Business Rule.		
< Client >	The opening and closing tag of the Client Tag. Define the valid Client Type. Refer to Database AsCode Table- AsCodeClientType for details.		
	TYPECODE	String	Defines the client type. Any valid client type code from AsCodeClientType.
<Action>	Field values that define the type of action for this Client.		
	TYPE	Defines the action that invokes the change. <b>TYPE</b> can contain a comma separated list.	
		*	Occurs when client is added, updated or when address is added or updated.
		ClientAdd	Occurs when client is added.
		ClientUpdate	Occurs when client is updated.

		AddressAdd	Occurs when address is added.
		AddressUpdate	Occurs when address is updated.
<Spawns>	Indicates the start of spawns action and determines spawn functionality for the specified transaction. Refer to the Transaction Configuration section of the Technical Manual for details and options.		
<Spawn>	Defines the condition to initiate the spawn. The Transaction Configuration section of the Technical Manual contains further information about the <Fields> element and the available options.		
	IF	True	Spawns transaction if condition is true
		False	Spawns transaction if condition is false
<Transaction>	Defines the transaction spawn code field values. Same spawn codes available as for activities. Also used to specify the Name of the Transaction to be spawned.		
	SPAWNCODE	String	Indicator of when to spawn. EX. 01,09,20
<SpawnField>	Start of transaction/activity fields specification. Refer to the Transaction Configuration section of the Technical Manual that contains further information about the <SpawnFields> element and the available options.		
		String	Indicator of when to spawn.
<From>		String	Field or Math Variable to get the data to pass to the spawned activity.
<To>		String	Name of the field in the spawned activity that will receive data.
<DataType>		String	Defines the valid field value of the DataType.

## XML Example

```

<ClientChangeAction>
  <!-- Individual -->
  <Client TYPECODE="02">
    <Action TYPE="AddressUpdate">
      <Spawns>
        <Spawn IF="True">
          <Transaction SPAWNCODE="01">ChangeAddress</Transaction>
          <SpawnFields>
            <SpawnField>
              <From>New:AddressRole:AddressRoleGUID</From>
              <To>AddressRoleGUID</To>
              <DataType>Combo</DataType>
            </SpawnField>
          </SpawnFields>
        </Spawn>
      </Spawns>
    </Action>
  </Client>

```

## 27. ClientDuplicateScreen

### Description

This business rule allows for the configuration of a screen that searches for duplicate clients. It also allows for the design of a list of the fields for each client type to be used for the search. It lists the searchable fixed

and dynamic fields. There will also be a section to define which details can be viewed when a duplicate record is chosen.

### ClientDuplicateScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<ClientDuplicateScreen> </ClientDuplicateScreen>	The required opening and closing elements of this business rule.		
<Client>	This element defines the client.		
	TYPECODE	ClientTypeCode (AsCode)	
<Search>	Used to initiate the search process.		
<FixedFields>	Allows the change of labels on the above the line fixed fields. The <Fields> element is not used when a <FixedFields> element is present.		
<Field>	This element defines the field descriptions, display and type of field of the screen. The <u>Transaction Element</u> document contains further information about the <Fields> element and the available options.		
<DynamicFields>	Allows dynamic fields on the screen to be configured.		
<Fields>			
<Field>	This element defines the field descriptions, display and type of fields on the Screen. The Transaction Element document contains further information about the <Fields> element and the available options.		
<Details>	Data returned as result of requested search.		
<FixedFields>	Allows the change of labels for fixed fields.		
<Fields>			
<Field>	This element defines the field descriptions, display and type of fields on the Screen.		
<DynamicFields>	Allows dynamic field on the screen.		
<Fields>			
<Field>			
<Table>	Used to format display of data returned in the search results.		
<Column>	Defines the columns in the table		
	WIDTH	Numeric	The width of the column.
	ALIGN	Left Center Right	
	FORMAT	Text Date Currency	
	EDITABLE	Defines if the column is editable.	
	RECONCILE	Indicates whether an unreconciled amount should be calculated along with the total for the column.	
	FIELD	Field to use to calculate the unreconciled amount.	

	TOTAL	Sets the value that indicates whether a total should be calculated for a column.
<Display>	Label or display (on the PolicyRolesScreen) for the Field.	
<Name>	Name of the Field that will be displayed on teh PolicyRolesScreen	
<Group>	ROLECODE	
<DataType>	Defines the datatype of the field.	
<Query>	Define the type of query.	
	TYPE	
<Calculated>	TYPE	
	METHOD	
	PLAN	
<Results>	Defines the Results	
<Query>		
<SortOrder>	Defines the sort order.	
<Field>	TYPE	
<FreezeColumns>	Defines the number of columns to freeze from the left in the table when displayed.	

## ClientDuplicateScreen Images

Client Duplicate Criteria

Client Type: Individual

First Name: ☐

Last Name: ☐

Date Of Birth: ☐

Sex: ☐

Tax ID: ☐

Date Of Death: ☐

Find Close

Client Duplicate Criteria

Client Type: Individual

First Name: ☒

Last Name: ☒

Date Of Birth: ☒

Sex: ☒

Tax ID: ☒

Date Of Death: ☒

Find

Close

Duplicates

First Name	Sex	Last Name	Tax ID	Date Of Birth	Count
Ali	M	Khandani			2
Alice	M	Cooper	258-36-9147	08/28/1954	2
Jet	M	Li			2
Jillian	F	Lennon	456-12-3987	03/21/1999	2
Joe	M	Smith	888-88-8777	05/04/1967	2
Lady	F	Luck			2
Michael	M	M'Gee	045-00-0022	01/01/1940	2
Ryan	M	Lavery	118-11-8118	12/13/1969	2
Test	M	Client	111-11-1111		4
Wyatt	M	Patterson	111-91-9191		2

Combine

No results present

Duplicates

First Name	Sex	Last Name	Tax ID	Date Of Birth	Count
Ali	M	Khandani			2
Alice	M	Cooper	258-36-9147	08/28/1954	2
Jet	M	Li			2
Jillian	F	Lennon	456-12-3987	03/21/1999	2
Joe	M	Smith	888-88-8777	05/04/1967	2
Lady	F	Luck			2
Michael	M	M'Gee	045-00-0022	01/01/1940	2
Ryan	M	Lavery	118-11-8118	12/13/1969	2
Test	M	Client	111-11-1111		4
Wyatt	M	Patterson	111-91-9191		2

Combine

Primary	Combine	Name	Address	SSN
<input type="radio"/>	<input type="checkbox"/>	Smith, Joe		888-88-8777
<input type="radio"/>	<input type="checkbox"/>	Smith, Joe		888-88-8777

Combine

## XML Example

```

<ClientDuplicateScreen>
  <Client TYPECODE="01">
    <Search>
      <FixedFields>
        <Field>
          <Name>CompanyName</Name>
          <Display>Company</Display>
          <DataType>Text</DataType>
        </Field>
      </FixedFields>
    </Search>
  </Client TYPECODE="01">
</ClientDuplicateScreen>

```



```

        </Field>
        <Field>
            <Name>TaxId</Name>
            <Display>TIN</Display>
            <DataType>Text</DataType>
        </Field>
    </FixedFields>
</Search>
<Details>
    <FixedFields>
        <Field>
            <Name>CompanyName</Name>
            <Display>Company</Display>
            <DataType>Text</DataType>
        </Field>
        <Field>
            <Name>TaxId</Name>
            <Display>TIN</Display>
            <DataType>Text</DataType>
        </Field>
    </FixedFields>
</Details>
</Client>
</ClientDuplicateScreen>

```

## 28. ClientFieldEditMode

### Description

This business rule defines the fields and the conditions under which the fixed and dynamic fields are to be disabled from the Client Field Screen for the various client types. This business rule also defines the indicator to control the capacity to disable the Group client type. Client type code "05" (Group) will be used as an example for documentation purposes.

### ClientFieldEditMode Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<ClientFieldsEditMode> </ClientFieldsEditMode>	Required parent elements that indicate the opening and closing of this business rule.		
<Client>	Required element defining Client Type Code to be to be edited.		
	TYPECODE	Code (as defined in AsCodeClientType)	
<DisableFields >	Indicates the opening and closing of the element defining the specific fixed fields) to be disabled when the EXPRESSION attributes of the specified field is set to “02”.		
	EXPRESSION	String	Conditional Test (xxx=xxx)
	DISABLEALL	Yes	Disables all fixed fields.
		No	Indicates that only the specified fixed field(s) where the EXPRESSION attribute is set to “01” is to be disabled.
<FixedFields>	Allows configuration of 'above the line' fields.		
<Fields>	This element represents an input control that will accept input from the user or the system. The Appendix 2 – Transaction Configuration document contains further information about the <Fields> element and the available		

	options.
<DymanicFields>	Indicates the opening of the element that defines the dynamic fields (configurable fields) to be disabled.
<MultiFields>	Allows configuration of MultiFields.
<MultiField>	

## XML Example

```

<ClientFieldsEditMode>
  <Client TYPECODE="05">
    <DisableFields EXPRESSION="Client:GroupStatus" ="01" DISABLEALL="No">
      <FixedFields>
        <Fields>
          <Field>CompanyName</Field>
        </Fields>
      </FixedFields>
      <DynamicFields>
        <Fields>
          <Field>GroupBillDay</Field>
          <Field>GroupMode</Field>
        </Fields>
      </DynamicFields>
    </DisableFields>
    <DisableGroup EXPRESSION="Client:GroupStatus" ="02" DISABLEALL="Yes"></DisableGroup>
  </Client>
</ClientFieldsEditMode>

```

## 29. ClientGroupAddFieldsEditMode

### Description

The ClientGroupAddFieldsEditMode Business Rule allows a user to configure when fields will be disabled on the ClientGroupAddScreen. The business rule performs similarly to the ClientFieldsEditMode and AddressFieldsEditMode business rules.

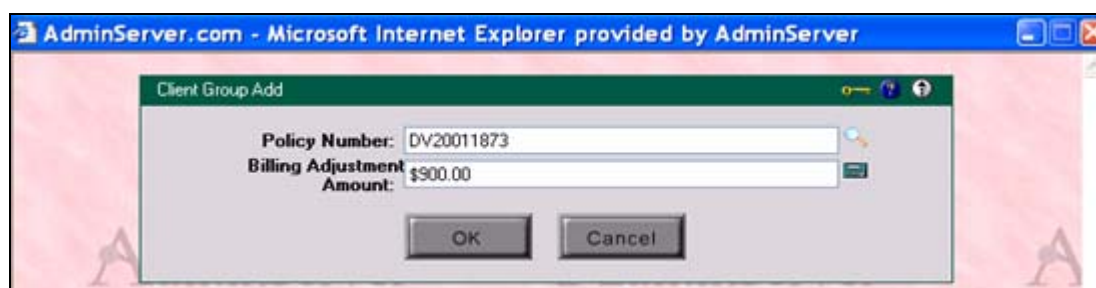
### ClientGroupAddFieldsEditMode Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Option		
< ClientGroupAddFieldsEditMode > </ClientGroupAddFieldsEditMode >	Required elements that indicate the opening and closing of the ClientGroupAddFieldsEditMode.		
<Client>	Initiates defining the field characteristics of the client to determine available functionality.		
	TYPECODE	Defines field value of AsCodeClientType code. Should use the client type designated for group processing in the ClientScreen and ClientGroupScreen business rules.	
<DisableFields>	Indicates the Elements in the General Sequence for Transactions. Each DisableFields tag is required to have an EXPRESSION attribute.		
	EXPRESSION	String	Conditional Test (XXX=XXX). Available Client Group fields are: ClientGroupGUID, ClientGUID, PolicyGUID or any dynamic configured ClientGroupField.

	DISABLEALL	Yes	Indicates all fields are disabled. Expression attribute uses Client and ClientGroup fields for its condition.
		No	Indicates that fields are not disabled.
<FixedFields>	Indicates start tag of Fixed Fields elements and definition as displayed above the line.		
<Fields>			
<Field>	Defines the field value with the policy number associated with this client group.		
		String	PolicyNumber
<DynamicFields>	Indicates start tag for dynamic changes in labels on the 'configured' fields.		
<Fields>			
<Field>	This element defines the dynamic field name to be disabled from the ClientGroupAddScreen business rule.		
		String	

## ClientGroupAddFieldsEditMode Screen Images

When the ClientGroupAddFieldsEditMode rule is configured, the fields on this screen can be disabled.



## XML Example

XML Example:

```
<ClientGroupAddFieldsEditMode>
  <Client TYPECODE="05">
    <DisableFields EXPRESSION="Client:GroupStatus = 01" DISABLEALL="No">
      <FixedFields>
        <Fields>
          <Field>PolicyNumber</Field>
        </Fields>
      </FixedFields>
      <DynamicFields>
        <Fields>
          <Field>PremiumAmount</Field>
        </Fields>
      </DynamicFields>
    </DisableFields>
  </Client>
</ClientGroupAddFieldsEditMode>
```

```

        </DynamicFields>
    </DisableFields>
</Client>
</ClientGroupAddFieldsEditMode>

```

## 30. ClientGroupAddScreen

### Description

The business rule ClientGroupAddScreen provides a method to add or remove policies to/from a group. Specific policy-level activities can be generated based on an action performed on the policy on the group.

### ClientGroupAddScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<ClientGroupAddScreen> </ClientGroupAddScreen>	The opening and closing elements of the screen rule.		
<Client>	TYPECODE	The client type of the group. Must match TYPECODE from ClientGroupScreen business rule.	
	ROLECODE	The role of the Group on the added policy. Value is from the AsCodeRole table.	
<FixedFields>	Changes the labels on the "above the line" fixed fields.		
<Fields>	Refer to the Transaction Configuration section of the Technical Mnaual, which contains further information about the <Fields> element and the available options.		
<OnLoad>	Refer to the OnLoad and OnChange sections of the Transaction Configuration section of the Technical Manual. This contains further information about the available options for these elements.		
<OnChange>			
<Validation>	Refer to the Validation sections of the Transaction Configuration section of the Technical Manual. This document contains detailed information about the available options for Validation.		
<Expressions>	Refer to the Validation sections of the Transaction Configuration section of the Technical Manual. This document contains detailed information about the available options for Expressions within Validation.		
<GenerateActivities>	Spawns policy level activities upon adding, editing or deleting policies in a group		
<Activity>	IF	Conditional Test	
	ON	Add	Adds activities when policy is added to group.
		Update	Updates policy level activity.
		Delete	Deletes policy level activity on group policies.
<Transaction>	Name of transaction to be generated on each policy.		

<Fields>	Allows configuration of field values to pass to generated policy and activity.
<Field>	The opening and closing tag for each Field being configured.
<From>	Name of ClientGroup or ClientGroupField data is being copied from.
<To>	Name of Policy level Activity field being copied to.

## XML Data

```

<ClientGroupAddScreen>
  <Client TYPECODE="03" ROLECODE="22">
    <Fields>
      <Field>
        <Name>PremiumAmount</Name>
        <Display>Premium Amount</Display>
        <DataType>Money</DataType>
      </Field>
      <Field>
        <Name>OwnerName</Name>
        <Display></Display>
        <DataType>Text</DataType>
        <Calculated TYPE="SQL">SELECT ...'</Calculated>
        <Hidden>Yes</Hidden>
      </Field>
      <Field>
        <Name>PolicyBillingMethod</Name>
        <Display>Policy Billing Method</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
    <OnLoad></OnLoad>
    <OnChange></OnChange>
  </Client>
  <GenerateActivities>
    <Activity IF="1=1" ON="Delete">
      <Transaction>TestBonus</Transaction>
      <Fields>
        <Field>
          <From>PaymentAmount</From>
          <To>BonusAmount</To>
          <DataType>Money</DataType>
        </Field>
      </Fields>
    </Activity>
  </GenerateActivities>
</ClientGroupAddScreen>

```

## 31. ClientGroupScreen

### Description

This business rule defines the table that is displayed on the ClientGroup screen (Group/Activity). This business rule can be a global rule or overridden at the activity level. The columns in the table include a Group tag that indicates from where the column's value is derived. Valid Group values are ClientGroup, ClientGroupField, Client, ClientField, Policy and PolicyField.

### ClientGroupScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<ClientGroupScreen> </ClientGroupScreen>	The required opening and closing elements of this business rule.
<Client>	TYPECODE      Code (as defined in <i>AsCodeClientType</i> ). Must be the client type that represents the Group parent client.
<Table>	Controls formatting of Role display. Press <Table> link for additional information on the <Table> Element configuration. FORMAT is not supported (from link to <Table>).
<Fields>	Required sub element that defines the type of field data that will be passed to the activity. Fields and OnChange only get executed when screen is accessed through an activity. Only applicable to ClientGroupScreen overridden at a transaction level.
<OnLoad> <OnChange>	Refer to the OnLoad and OnChange sections of the Transaction Configuration section of the Technical Manual. This contains further information about the available options for these elements. <b>Note:</b> Only applicable to ClientGroupScreen overridden at the transaction level.

### Client Group Screen Image

Policy Number	Payment Mode	Amount Paid	Total Bill Amount
UL96008748	01	\$10,000.00	\$2,000.00
UL96008820	01	\$456.00	\$2,000.00
SVUL96009156	04	\$0.00	\$0.00
UL96008612	01	\$120.00	\$2,000.00
<b>Total:</b>		<b>\$10,576.00</b>	<b>\$6,000.00</b>

### ClientGroupScreen Database Table

Table Name	Description
AsClient	Holds people and corporations/companies that can fill various roles related to policies.
AsClientField	Stores Field names and values related to Clients

AsClientGroupField	Stores the data that is populated from the defined group fields on the policy.
AsClientActivityGroupField	Stores field names and values of activities related to group clients.
AsClientGroup	Stores client group activities
AsClientActivityGroup	Stores GUIDs for client group policy activities

## XML Data

```

<ClientGroupScreen>
  <Client TYPECODE="05">
    <Table>
      <Column WIDTH="100" ALIGN="LEFT">
        <Display>Insured Name</Display>
        <Name>InsuredLastName</Name>
        <DataType>Text</DataType>
        <Group>PolicyField</Group>
      </Column>
      <Column WIDTH="100" ALIGN="LEFT">
        <Display>Policy Number</Display>
        <Name>PolicyNumber</Name>
        <DataType>Text</DataType>
        <Group>Policy</Group>
      </Column>
      <Column WIDTH="100" ALIGN="LEFT">
        <Display>Billing Frequency</Display>
        <DataType>Text</DataType>
        <Name>PaymentModeAlpha</Name>
        <Group>PolicyField</Group>
      </Column>
      <Column WIDTH="100" ALIGN="RIGHT">
        <Display>Billing Amount</Display>
        <DataType>Money</DataType>
        <Name>GroupBillPremiumDueAmount</Name>
        <Group>PolicyField</Group>
      </Column>
      <Column WIDTH="100" ALIGN="RIGHT" TOTAL="Yes" EDITABLE="Yes">
        <Display>Billing Adjustment Amount</Display>
        <Name>PremiumAmount</Name>
        <DataType>Money</DataType>
        <Group>ClientGroupField</Group>
      </Column>
    </Table>
    <Fields>
      <Field>
        <Name>TotalBillAmountDisplay</Name>
        <Display>Total Bill Amount</Display>
        <Disabled>Yes</Disabled>
        <DataType>Money</DataType>
      </Field>
      <Field>
        <Name>AmountPaid</Name>
        <Display>Amount Paid</Display>
        <Disabled>Yes</Disabled>
        <DataType>Money</DataType>
      </Field>
      <Field>
        <Name>UnreconciledAmount</Name>
        <Display>Unreconciled Amount</Display>
        <Disabled>Yes</Disabled>
        <DataType>Money</DataType>
      </Field>
      <Field>
        <Name>ReconciledAmount</Name>
        <Display>Reconciled Amount</Display>
        <Disabled>Yes</Disabled>
        <DataType>Money</DataType>
      </Field>
    </Fields>
  </Client>
</ClientGroupScreen>

```

```

        <Name>BillDueDate</Name>
        <Display>Group Bill Date</Display>
        <Disabled>Yes</Disabled>
        <DataType>Date</DataType>
    </Field>
</Fields>
<OnLoad>
    <Field>txtReconciledAmount</Field>
</OnLoad>
<OnChange>
    <Change>
        <Name>ReconciledAmount</Name>
        <Type>Compare</Type>
        <Expression>1==1</Expression>
        <IfTrue>document.frmAsClientGroup.ReconciledAmount.value =
document.frmAsClientGroup.totals_PremiumAmount.value.replace("$", "").replace(", ", "");
document.frmAsClientGroup.UnreconciledAmount.value = (1*document.frmAsClientGroup.AmountPaid.value) -
(1*document.frmAsClientGroup.totals_PremiumAmount.value.replace("$", "").replace(", ", ""));</IfTrue>
        <IfFalse></IfFalse>
    </Change>
    <Change>
        <Name>totals_PremiumAmount</Name>
        <Type>Compare</Type>
        <Expression>1==1</Expression>
        <IfTrue>document.frmAsClientGroup.ReconciledAmount.value =
document.frmAsClientGroup.totals_PremiumAmount.value.replace("$", "").replace(", ", "");
document.frmAsClientGroup.UnreconciledAmount.value = (1*document.frmAsClientGroup.AmountPaid.value) -
(1*document.frmAsClientGroup.totals_PremiumAmount.value.replace("$", "").replace(", ", ""));</IfTrue>
        <IfFalse></IfFalse>
    </Change>
</OnChange>
</Client>
</ClientGroupScreen>

```

## 32. ClientGroupScreenEditMode

### Description

The ClientGroupScreenEditMode Business Rule allows a user to configure when buttons will be displayed on the ClientGroupScreen. This controls when policies can be added, removed or updated from a group at the ClientGroupScreen level. This business rule performs similarly to the ClientFieldsEditMode and AddressFieldsEditMode business rules.

### ClientGroupScreenEditMode Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
< ClientGroupScreenEditMode > </ClientGroupScreenEditMode>	Required elements indicate the opening and closing of the ClientGroupScreenEditMode.		
<Client>	Initiates defining the field characteristics of the client to determine available functionality.		
	TYPECODE	String	Defines field value of AsCodeClientType code. Allows multiple HideButtons tags for each client type. Should use the Client type designated for group processing in ClientScreen and ClientGroupScreen business rules.



<HideButtons>	Indicates the Condition to hide buttons for Client Fields. . Each HideButtons tag is required to have an EXPRESSION attribute. String		
	EXPRESSION	String	Conditional Test (XXX=XXX) AsClient and AsClient Fields available in Expression.
	HIDEALL	Yes	Indicates all buttons are hidden except Close.
		No	All buttons are not hidden.
<Buttons>	Indicates the screen buttons to hide.		
<Button>	Indicates the screen buttons to hide.		
	Add	Indicates Add button	
	Delete	Indicates Trashcan icon	
	Edit	Indicates 'Press' select button	

## ClientGroupScreenEditMode Screen Images

ClientGroupScreenEditMode configured with a true EXPRESSION. HIDEALL="Yes":

Policies Related to Group Billing

Page 1 of 1      Page 1      Maximum Results: 10

Policy Number	Payment Mode	Amount Paid	Total Bill Amount	Test Field
UL96009136	01			
UL96008751	01			
<b>Total:</b>		<b>\$0.00</b>	<b>\$0.00</b>	

Close

When the ClientGroupScreenEditMode rule is configured, the Add, Edit and Delete icons can be hidden.

Policies Related to Group Billing					
Page 1 of 1		Page 1		Maximum Results: 10	
Payee Name	PolicyNumber	Billing Frequency	Billing Amount	Billing Adjustment Amount	
Gauguin, Paul	DV20011969	Monthly	0.0	0.0	
Gorbachev, Mikail	DV20011970	Monthly	0.0	0.0	
Gore, Al	DV20011971	Quarterly	0.0	0.0	
	DV20011980	Monthly	0	0.0	
	DV20011982	Monthly	0	0.0	
<div> <div>Add</div> <div>Close</div> </div>					

## XML Example

XML Example:

```
<ClientGroupScreenEditMode>
  <Client TYPECODE="05">
    <HideButtons EXPRESSION="Client:GroupStatus = 01" HIDEALL="No">
      <Buttons>
        <Button>Add</Button>
        <Button>Edit</Button>
      </Buttons>
    </HideButtons>
  </Client>
</ClientGroupScreenEditMode>
```

## 33. ClientScreen

### Description

This Business Rule allows you to configure fixed, dynamic and multi fields on the ClientScreen. This rule holds the indicator required to determine if a Client Type is an Individual or Corporation. A separate section is configured for each Client Type, which is identified by its Typecode. This rule is also used to control the display of Policy Roles, Individual Fields, Address Table, the TaxID Field on Client Screen, and the process button for future activities on the Client Activity Screen.

### ClientScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<ClientScreen> </ClientScreen>	The required opening and closing elements of this business rule.		
<ShowRoles>	This element controls the display of the Policy Roles section on the Client Screen.		
		Yes	Displays Policy Roles section on Client Screen.

		No	Policy Roles section will not be displayed on Client Screen. <b>Note:</b> If this element is not present the default is "No."
<Client>	This element defines the Client Type, Group and ActivityPlan for each Client Type. This is a repeatable element.		
	TYPECODE	Code	As defined in AsCodeClientType table.
	SAVELIMIT	Yes	Will not let you add or save new clients for that Client Type.
		No	Will let you add or save new clients for that Client Type. Note: If this attribute is not present the default is "No."
	GROUP	Yes	Displays Group button on the Client Screen for the Client Type.
		No	Group button will not be displayed.
ACTIVITYPLAN		String Any plan name.	
<DisplayIndividualFields>  <b>Note:</b> When PREFIX or SUFFIX are not present or are set to "No," the combo box will not be displayed on the Client Screen and the values stored for it will be NULL in AsClient table.  Prefix and Suffix fields will show up next to the FirstName, LastName and Middle Initial fields as combo boxes.  Short descriptions of the selected codes(as defined in code names AsCodeClientPrefix and AsCodeClientSuffix) will be saved in Prefix and Suffix columns of AsClient.	Controls the display of individual fields (FirstName, MiddleInitial, LastName, Sex, CompanyName and TaxID) on the Client Screen for the Client Type.		
		Yes	Displays First Name, MI, Last Name, Gender and SSN fields for Client Type
		No	Displays Company Name & TIN fields for client type
	TYPE	Internal	When TYPE="Internal" Gender, DOB and DoD fields will not be displayed on Client Screen.
	PREFIX	Yes	Displays Prefix combo box.
		No	Prefix combo box will not be displayed.
	SUFFIX	Yes	Displays Suffix combo box.
		No	Suffix combo box will not be displayed.
<DisplayAddress>	Controls the display of address information (invoked by AddressScreen Business Rule) on the Client Screen.		
		Yes	Displays address information on the Client Screen.
		No	When set to "No", the address tables on the screen will not display.
<GenderRequired>		Yes	Gender must be entered.
		No	Gender is not required for the Client Type.
<DisplayTaxID>	Controls the display of the TaxID field on the Client Screen.		
		Yes	Displays TaxID field on the screen.
		No	TaxID field will not be displayed on the screen.
<ProcessFutureActivity>	Controls the display of the Process button for future activities on the Client Activity Screen. This is used with Activity Processing.		
		Yes	Displays Process button for future activities on Client Activity Screen.
		No	Process button will not be displayed for future activities on Client Activity Screen.
<CompanyNameDisplay>	Defines the display name of the "CompanyName" field on the Client Screen.		

		String	Display Name for "CompanyName" field. CompanyName field will be displayed with the specified display name on the Client Screen.
<MultiFields>	Allows for the configuration of MultiFields. Press <MultiFields> link for additional information on the <MultiFields> Element configuration.		
	Displays MultiFields on the Client Screen.		
	RULE	String	MultiFields Rule name. This MultiFields rule is used to display MultiFields.
<FixedFields>	<p>Allows for the configuration of 'above the line' fields. Press &lt;FixedFields&gt; link for additional information on the &lt;FixedFields&gt; Element configuration. In addition to this, the attributes and values listed below can be configured for &lt;Field&gt; element:</p> <p>1. &lt;Display&gt; element can be configured with MASK attribute with values: SSN, DOB.</p> <p>Formats field values based on the Masks Business Rule.</p> <p>2. &lt;Disabled&gt; element can also be configured with value "ReadOnly."</p>		
<Fields>	<p>Allows for the configuration of dynamic fields. Press &lt;Fields&gt; link for additional information on the &lt;Fields&gt; Element configuration. In addition to this, the values below can be configured for &lt;DataType&gt; sub element:</p> <p>&lt;DataType&gt; tag can also be configured with values: Client, Policy</p> <p>Client: Field will be displayed as a disabled text box with a People icon next to the field. Clicking the People icon will lead to the respective Search screen through a pop-up. The user can then do a search to select a Client and the display of the Field will be a description of that record. (i.e. Client Name).</p> <p>Policy: Field will be displayed as a disabled text box with a Find icon next to field. Clicking the Find icon will lead to the respective Search screen through a pop-up. The user can then do a search to select a Policy and the display of the Field will be a description of that record. (i.e. Policy Number).</p>		
<OnLoad>	Refer to the OnLoad and OnChange sections of the Transaction Configuration section of the Technical Manual. This contains further information about the available options for these elements. Additional information can also be found in the Screen Rules document.		
<Field>	Fields listed in this element effect other fields on the screen and will execute OnChange command.		
		String	Name of the field preceded by its Datatype.
<Validation>	Allows for the configuration of edits and validations..		

## ClientScreen Images

Policy Client Inquiry Batch Tables Rules Administration System

Client New Edit Search

First Name: SSN:

Sex: ☐ Male ☐ Female Date Of Birth: Date Of Death:

InCorp Date: Account Type: AdminServer

Preferred Client: ☐ Suppress All Mail: ☐ Yes ☒ No

Email Delivery: ☐ Yes ☒ No Non-resident Alien: ☐ Yes ☒ No

NonNaturalOwner: ☐ Yes ☒ No Marital Status: Unknown

Name on Check: W9 Received: ☒ No ☐ Yes

Client Restrict Code: Not Applicable Priority Client Ind: Private Wealth

Agency Name: Agent Number:

Agreement Code:

New Save Security History Close

Address

Default Role Address

Address Role: EFT Effective Date: Expiration Date:

Address:

City, State, Country:

Postal ID:

E-Mail: Phone: Fax:

Account No.: Routing No.: Bank Name: Account Type: ☐ Checking ☐ Savings Depositor:

New Save

Client Search Criteria

Client Type: Individual Login Name: Last Name: First Name: Date of Birth: TIN/SSN:

Find Close

Search Results

Page 1 of 51 Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 Maximum Results: 10

Name	Tax ID	Address	Phone Number
Aak, Ask	aaa	4th & Broadway, New York, NY10007	
Age18, Over	882-99-4671	123 Test Dr.	
Age60, Over	882-30-0433	123 Main St., Philadelphia, PA19124	
Agent, Tom	111-21-2345	null	
Agent, Tom	111-11-1111	1 New Address, Media, PA	
Agira Jr, Nyrat	123-98-0987	123 Street Rd	
Ale, Andrew	045-00-0036		
Anastasio, Trey	006-56-7317	246 Test Dr., West Chester, PA19382	
Andrews, Alice & Co.	045-00-0005	15th & Market St., Apts. 1 & 2, Apts. 1 & 2, Philadelphia, PA19124	
Andrews, Duncan			

## Database Tables for ClientScreen

Table Name	Description
AsClient	Stores individuals and corporate entities that can fill various roles related to policies.
AsClientField	Stores Field names and values related to Clients
AsClientGroup	Stores client group activities
AsClientGroupField	Stores the data that is populated from the defined group fields on the policy.

## XML Example

```

<ClientScreen>
<ClientScreen>
  <!-- Individual -->
  <Client TYPECODE="02" ACTIVITYPLAN="Client Plan">
    <DisplayIndividualFields>Yes</DisplayIndividualFields>
    <DisplayAddress>Yes</DisplayAddress>
    <GenderRequired>Yes</GenderRequired>
    <Fields>
      <FixedFields>
        <Field>
          <Name>Sex</Name>
          <Query TYPE="SQL">SELECT 'F','Female' FROM ....</Query>
        </Field>
      </FixedFields>
      <Field>
        <Name>ClientAccountType</Name>
        <Display>Account Type test</Display>
        <DataType>Combo</DataType>
        <Query TYPE="FIXED">
          <Options>
            <Option>
              <OptionValue>01</OptionValue>
              <OptionText>AdminServer</OptionText>
            </Option>
          </Options>
        </Query>
      </Field>
    </Fields>
  </Client>
</ClientScreen>

```

## 34. ClientSearchScreen

### Description

This Business Rule defines the configuration for search criteria and fields for the Client Search Screen. The screen allows the ability to search on various Client types like: Individual, Group, Producer, etc. Upon entry to the screen, the Default Search criterion is Individual.

### ClientSearchScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Option
<ClientSearchScreen> </ClientSearchScreen>	The required opening and closing elements of this ClientSearchScreen business rule.
<Client>	Required, Repeatable Element. Indicates the opening of the Client field descriptions and related values. Used to search for different types of clients specified in the Type Code attribute. Refer to the Database Tables section of the Technical Manual for details. In addition also allows for the ability to search External Clients from within the Client Search screen and perform actions on that External Client like any other client type.

	TYPECODE	Code	Code from AsCodeClientType.
<Parameters>	The Parameters element encloses the list of individual Parameter data elements that are passed in a web service request. The External Client Detail screen will grab those parameters request object and perform another web service call to retrieve all the detail for that specific Client. This tag works exclusively with Client TYPE="External".		
<Parameter>	Indicates the ability to search External Clients from within the Client Search screen and perform actions on that External Client like any other client type. The Parameter tag begins the definition of a single parameter. The value inside of the Parameter tag is an XML string. All data inside of the Parameter tag will be sent as the value of that parameter. The characters "<u>" and "<u>" are used to identify variable names that should be replaced with values during web service processing. These variable names must match the name of Column/Field on Client Search Screen. The External Client Detail screen will grab those parameters request object and perform another web service call to retrieve all the detail for that specific parameters. *The Parameters will be supplied in the 'WEBSERVICE' business rule within these brackets [ ], [ ]. Make sure that the parameters passed in as key=value have the keys as shown in the 'WebServices' business rule.		
		String	This holds the exact name of the "pre-defined math variable" in the Transaction.
	NAME	The "NAME" attribute holds the name of the required parameter, as defined in the web service's operation, which is the name of the column to be passed to the External Client Screen when searching for External Client on Client Search Screen. The search screen can be linked to the web service via the field names on the screen. The 'parameter Name' should be the same as the one within "<u>" (square brackets) in the 'WEBSERVICE' business rule. <b>Example:</b> <Parameter>NAME="CPFID">CPFID</Parameter>	
<Search>	Required; Repeatable Element. Indicates and defines search criteria and the fields to be included as part of the Client Search Screen activity.		
<FixedFields>	Changes the labels on the "above the line" fixed fields.		
		String	The fixed fields must correspond to a column in the AsClient database table.
<Fields>	Dynamically changes labels on the "below the line" fields.		
		String	The Dynamic Fields must correspond to a column in the AsClientField database table.
<InputFocus>	It is used to set Input Focus on defined field when the Client Search Screen is first displayed. If a field in the <Fields> section of a business rule has an <InputFocus> tag set to "Yes", this field will receive focus when the screen first loads.		
	Note: Element value should be specified to control the Initial Focus on the Client search Screen.		
		Yes	Specified field will receive focus when the Client Search screen first loads.
		No	No field will receive focus when the Client Search Screen first loads.

<Results>	Required. Defines the results. This element provides the return of the search and the data in the Results override the fixed fields.		
	INITIALRESULTS	All	Indicates display of all the client search results.
		User	Indicates Client search results tied to the client login.
		None	Indicates no client search results displayed.
<Table>	Required. The element that defines the screen as a table format and controls the display of results, formats results in a table. Press <Table> link for additional information on the <Table> Element configuration.		
	NAME	Client	Indicates the fields that you want to have combined. Example would be having search fields of First and Last name but in the results table the two values are combined into one column value.
<Column>	Required. Defines the format of the columns to be displayed on the specified table.		
	WIDTH	Integer	Defines the column width of the table and the number of characters that can be displayed in the specified column.
	ALIGN	Left	Aligns the value of the column/field to the left.
		Right	Aligns the value of the column/field to the right.
		CENTER	Aligns the value of the column/field to the center.
	FORMAT	Text	Formats the data as Text.
		Currency	Formats the data as Currency.
Date		Formats the data as Date.	
<Query>	Optional; Repeatable Element. Defines the type of the query. Used with the Combo DataType to retrieve options for the combo box.		
	TYPE	Sql	The SQL statement that returns the values (codevalue and short description) to be displayed in the combo box from the codes table.
		Fixed	The FIXED query type allows the user to established option values and option text of their choice to supply selections for the combo box field.
		Radio	Uses Options tag to fill the options.
<DataType>	Defines the datatype of the field		
<Query>	TYPE	Defines the type of the query	
<Calculated>	Allows comparison functionality for transaction and evaluating policy data. Applicable for Integer and Text type fields. Limits character entry. Calculated elements overrides Default activities.		
	TYPE	Sql	Allows for a SQL Query to be executed with the result being the date displayed in the field.
		Function	Executes a Function and returns the value.
		Eval	Uses numbers, operators, and fields to evaluate a value. Allows you to evaluate the Calculated Element by determining if the value is a number, operator, or string, then evaluating the expression.
		Replace	Replaces one substring with another substring.
		Rule	Executes the referenced rule.
	METHOD	IfEmpty	Used to check if a Field Value is empty, used in conjunction with a sql statement to retrieve a value to populate the field.



		Force	For Fields the FORCE attribute is used to force the field to have the calculated value every time the screen is loaded.
--	--	-------	---

## ClientSearchScreen Image

Client Search Criteria

Client Type: Individual

Login Name:

Last Name: Jones

First Name:

Date of Birth:

SSN:

Find

Close

Search Results

Page 1 of 1

Page 1

Maximum Results: 10

Name	Tax ID	Address	Phone Number
Jones, James	393-99-9999	123 Main St, Chester, PA 19013	
Jones, Michael	908-72-7687	15 Main Street, Beverly Hills, CA 90210	
Jones, Norah			
Jones, Sam A.	111-22-5555	null	

## Database Tables for ClientSearchScreen

Table Name	Description
AsClient	Holds people and corporations/companies that can fill various roles related to policies.
AsClientField	Stores Field names and values related to Clients
AsClientGroupField	Stores the data that is populated from the defined group fields on the policy.

## XML Example

XML Example:

```

<ClientSearchScreen>
  <Client TYPECODE="">
    <Search>
      <Fields>
        <Field>
          <Name>FirstName</Name>
          <Display>First Name</Display>
          <DataType>Text</DataType>
          <Group>Client</Group>
        </Field>
        <Field>
          <Name>LastName</Name>
          <Display>Last Name</Display>
          <DataType>Text</DataType>
          <Group>Client</Group>
        </Field>
        <Field>
          <Name>CompanyName</Name>
          <Display>Company Name</Display>

```

```

        <DataType>Text</DataType>
        <Group>Client</Group>
    </Field>
</Field>
    <Name>TaxID</Name>
    <Display>SSN</Display>
    <Group>Client</Group>
</Field>
</Fields>
</Search>
<Results>
    <Table>
        <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
            <Display>Contract Number</Display>
            <Group>Policy</Group>
            <Name>PolicyNumber</Name>
        </Column>
    </Table>
</Results>
</Client>
<Client TYPECODE="01">
    <Search>
        .....
    </Search>
    <Results>
        <Table>
            .....
        </Table>
    </Results>
</Client>
</ClientSearchScreen>

```

## 35. COAMask

### Description

This Business Rule defines the format for masking the account number for the chart of accounts record.

### COAMask Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<COAMask > </COAMask >	The required opening and closing elements of this business rule.
	String

### XML Example

```
<COAMask>nnnnnnnnnn</COAMask>
```

## 36. CompanyCosmetics Business Rule

### Description

This Business Rule is used to display backgrounds on all screens except LogOut, Security and Help Tip screens. This rule can also be used to

1. Control the display of the PolicyNumber field on the Main Menu Screen for a quick policy search by policy number.
2. Control the display of the PersonalID field on the Client Security Screen.

3. Set the first option blank in the Plan and Fund drop down box.
4. Make title substitution for fixed fields.

**Note:** This business rule should have company level override. Every time the configuration changes are made, it needs to be signed out and signed in again.

### CompanyCosmetics Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<CompanyCosmetics> </CompanyCosmetics >	Required element indicating the opening and closing of the business rule that defines the layout, format and branding of the main page.		
<CompanyCosmetics>	Indicates the opening of the tag that defines the page name and the casing.		
<Tile>	This element is used to display the background on all screens except Logout, Security and Help Tip screens.		
<ProperCase>	Changes the field value you just entered to proper case when you tab to the next field. For above the line fields of the Client Screen and the Address Screen except E-Mail field (applicable if the field value is in characters only).		
		Yes	Field value will be changed to proper case.
		No	Field value will not be changed to proper case.
<FilterLevel>	This element is used to specify the level to which the Filter should be set in the ActivityScreen (Policy, Client or Plan Activities).		
		Code	01=Plan level
			02=Company level
			03=Security Role level
<DisplayBlankPlan>	Displays the first option as blank in the Plan drop down box when it is set to "Yes."		
		Yes	Display the first option as blank in the Plan drop down box. No plan type will be selected as default. After a plan is selected, the fields will be loaded.
		No	First option will be selected in the Plan drop down box. The PolicyScreen will be loaded automatically for the plan when the "New" menu item is selected in the Policy Menu.
<DisplayBlankFund>	Displays the first option as blank in the Fund drop down box for any unsaved allocation items on the Allocation Screen through Policy, Plan and Activity Detail Screen.		
		Yes	Displays first option as blank in the Fund drop down box. No Fund type will be selected as default.
		No	First fund will be selected as default in the Fund drop down box. If element is not present, default is No.
<Security>	Identifies if Personal ID field is required to be entered on the Client Security Screen.		

		True	Personal ID must be entered on the Client Security Screen.
		False	Personal ID is not a required field.
<TabbedView>	Controls the display of tabs for Policy Screen, Client Screen, Segment Screen, Splash page, Roles Screen, Activity Screen and Policy Values Screen.		
		Yes	Allows the display of tabs.
		No	Tabs will not be displayed. If this element is not present, the default is No.
<FieldStyles	This is the opening tag that is used to control the display of field style based on the field type such as Required, Disabled, ReadOnly and Editable. FieldStyles is used to change the look and feel of each field. The system can set the style of each type of field so that they are distinguishable by changing the look and feel of each field.		
<ReadOnly>	This element is used to change the look and feel of ReadOnly fields.		
		DefaultReadOnly	
<Disabled>	This element is used to change the look and feel of Disabled fields.		
		DefaultDisabled	
<Editable>	This element is used to change the look and feel of Editable fields.		
		DefaultEditable	
<Required>	This element is used to change the look and feel of Required fields.		
		DefaultRequired	Colors the required fields orange.
<ProcessToolTip>	Displays the specified Tool Tip message when you mouse over the Process button. If this element is not present default Tool Tip is "Process."		
		ToolTipMessage	Displays the specified ToolTip message when you mouse over the Process button of Policy, Plan and Client level Activities.
<DeleteToolTip>	Displays the specified Tool Tip message when you mouse over the Delete button. If this element is not present default Tool Tip is "Delete."		
		ToolTipMessage	Displays the specified ToolTip message when you mouse over the Delete button of Policy, Plan and Client level Activities.
<ReverseToolTip>	Displays the specified Tool Tip message when you mouse over the Reverse button. If this element is not present default Tool Tip is "Reverse."		
		ToolTipMessage	Displays the specified ToolTip message when you mouse over the Reverse button of Policy, Plan and Client level Activities.
<RecycleToolTip>	Displays the specified Tool Tip message when you mouse over the Recycle button. If this element if not present default Tool Tip is "Recycle."		
		ToolTipMessage	Displays the specified ToolTip message when you mouse over the Recycle button of Policy, Plan and Client level Activities.

<Substitutions>	Element indicating the opening of the tag that defines fields that can be substituted for the fixed fields (above the line fields) and be displayed on the Policy page.		
<Owner>	Displays LastName,FirstName of the Client that is assigned to the role code if the Role's ClientType="02" or displays CompanyName on the PolicyActivity Screen and the ClientActivity Screen.		
		RoleName	Applicable Role name according to RoleCode that displays the title of the Role on the Policy Activity.
	ROLECODE	Code	Code value as defined in AsCodeRoleCode table.
<Company>	Substitutes the display name of the Company field on all screens where ever Company field exists in the above the line fields section. If element is not present default title is "Company."		
		Display name of the Company field	Displays the Company field name as specified.
<Plan>	Substitutes the display name of the Plan field on all screens where Plan field exists in the above the line fields section. If this element is not present default title is "Plan."		
		Display name of the Plan field	Displays the Plan field name as specified.
<Policy>	Substitutes the display name of the Policy Screen for below the line fields section. If this element is not present default title is "Policy."		
		Display name of the Policy Screen name	Displays the Policy Screen title as specified.
<PolicyNumber>	Substitutes the display name of the PolicyNumber field on all screens where PolicyNumber field exists in the above the line fields section. If this element is not present default title is "PolicyNumber."		
		Display name of the Policy Number field	Displays the PolicyNumber field name as specified.
<PolicyName>	Substitutes the display name of the PolicyName field on all screens where PolicyName field exists in the above the line fields section. If this element is not present default title is "PolicyName."		
		Display name of the Policy Name field	Displays the PolicyName field name as specified.
<PlanDate>	Substitutes the display name of the PlanDate field on all screens where PlanDate field exists in the above the line fields section. If this element is not present default title is "PlanDate."		
		Display name of the PlanDate field	Displays the PlanDate field name as specified.
<PolicyStatus>	Substitutes the display name of the PolicyStatus field on all screens where PolicyStatus field exists in the above the line fields section and in the pop up window when you mouse over a processed activity on Client, Policy and Plan Activity Screens.		
		Display name of the Policy Status field	Displays the PolicyStatus field title as specified.

<Segment>	Substitutes the display name of the Segment Screen. If this element is not present default title is "Segment."		
		Display name of the Segment Screen	Displays the Segment Screen title as specified.
<EffectiveDate>	Substitutes the display name of the EffectiveDate field on pop up window when you mouse over Processed activity and Activity grid of the Policy, Plan and Client Activity Screens. If this element is not present default title is "EffectiveDate."		
		Display name of the Effective Date field	Displays the EffectiveDate field as specified.
<Suspense>	Substitutes the display name of the Suspense Screen. If this element is not present default title is "SuspenseRecord."		
		Display name of the Suspense Screen	Displays the Suspense Screen title as specified.
<BatchSuspense>	Substitutes the display name of the BatchSuspense Screen. If this element is not present default title is "BatchSuspense."		
		Display name of the Batch Suspense Screen	Displays the Batch Suspense Screen title as specified.
<Fund>	Substitutes the display name of the Fund field on all screens where this field exists on above the line fields section. If this element is not present default title is "Fund."		
		Display name of the Fund field	Displays the Fund field title as specified on all screens where this field exists.
<ProcessedBy>	Substitutes the display name of the Processedby field in the pop up window when you mouse over a processed activity on Client, Policy and Plan Activity Screens. If this element is not present the default title will be displayed.		
		Display name of the ProcessedBy field	Displays the ProcessedBy field title as specified.
<ActiveFrom>	Substitutes the display name of ActiveFrom field in the pop up window when you mouse over a processed activity on Client, Policy and Plan Activity Screens. If this element is not present the default title is "ActiveFrom."		
		Display name of the ActiveFrom field	Displays the ActiveFrom field title as specified.
<ActiveTo>	Substitutes the display name of the ActiveTo field in the pop up window when you mouse over a processed activity on Client, Policy and Plan Activity Screens. If this element is not present the default title is "ActiveTo."		
		Display name of the ActiveTo field	Displays the ActiveTo field title as specified.

<DeletedBy>	Substitutes the display name of DeletedBy field in the pop up window when you mouse over a pending shadowed activity on Client, Policy and Plan Activity Screens. If this element is not present the default title is "DeletedBy."		
		Display name of the DeletedBy field	Displays the DeletedBy field title as specified.
<DateTime>	Substitutes the display name of DateTime field in the pop up window when you mouse over a processed activity on Client, Policy and Plan Activity Screens. If this element is not present the default title is "DateTime."		
		Display name of the Deleted By field	Displays the DateTime field title as specified.

## XML Example

```
<CompanyCosmetics>
  <CompanyCosmetics><Tile>TileACMEAlt.GIF.jpg</Tile><ProperCase>Yes</ProperCase></CompanyCosmetics>
  <Substitutions>
    <Company>Carrier</Company>
    <Plan>Plan</Plan>
    <Policy>Policy</Policy>
    <Segment>Segment</Segment>
    <PolicyNumber>Policy Number</PolicyNumber>
    <PolicyName>Quote Name</PolicyName>
    <PlanDate>Plan Date</PlanDate>
    <PolicyStatus>Policy Status</PolicyStatus>
    <Owner ROLECODE="16">Owner</Owner>
    <OwnerRoleCode>16</OwnerRoleCode>
    <EffectiveDate>Activity Date</EffectiveDate>
    <DeliveryRequirements>Delivery Requirements</DeliveryRequirements>
  </Substitutions>
  <CurrentEnvironment>
    <Default>Production</Default>
  </CurrentEnvironment>
  <Environments>
    <Production>
      <BackgroundImage>TileAcmeAlt.GIF</BackgroundImage>
    </Production>
  </Environments>
</CompanyCosmetics>
```

## 37. ConfirmationScreen

### Description

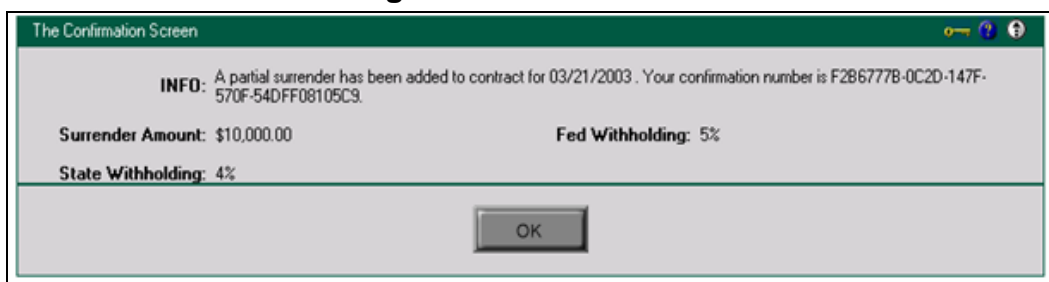
This Business Rule defines the dialog window to be displayed upon saving an activity. It can be configured to display activity details, which indicates to the user that inputs were successfully entered. It can also generate a script and confirmation number. In order to invoke this functionality this rule should be overridden at the appropriate Transaction level and the attribute ALLOWCONFIRMATION="Yes" should be added to the <Transaction> start tag.

### ConfirmationScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<ConfirmationScreen> </ConfirmationScreen>	The opening and closing tags of the Confirmation Screen.

<Confirmation>	Sub element defining the type and name of the Confirmation screen to be displayed.		
	TYPE	Rule	
	TITLE	Defines the name that will display in the heading of Confirmation screen. Spaces are allowed in the naming convention.	
<Labels>	This element indicates an input control that will accept input from the user or system.		
	TITLE	Defines the screen field names to be displayed on the Confirmations.	
	ALIGN	LEFT CENTER RIGHT	Defines how the contents of the specified TITLE fields will be displayed on the Confirmation screen.
	TEXT	Defines the values of the information to be displayed in the text fields on the Confirmation screen. Values in the specified positions must match the contents of the corresponding fields from the Activity Detail Screen business rule	
	FORMAT	Indicates the data type of the information to be displayed in the specified TITLE field on the Confirmation screen.	
		Sentence	Indicates that data is formatted and displayed in a sentence string.
		Money	Indicates that data is formatted and displayed as currency.
		Percent	Indicates that data is formatted and displayed as a percentage.
<Buttons>	Defines the command buttons to be displayed on the Confirmation screen. The buttons are displayed on the Confirmation screen in the order they are configured.		

## ConfirmationScreen Image



## XML Example

```

<ConfirmationScreen>
<Confirmation TYPE="Rule" TITLE="The Confirmation Screen">
  <Labels>
    <Label TITLE="INFO" FORMAT="Sentence">A partial surrender has been added to contract for
    $$$Activity:EffectiveDate$$$ . Your confirmation number is $$$Activity:ActivityGUID$$$.</Label>
    <Label TITLE="Surrender Amount" FORMAT="Money" ALIGN="LEFT">SurrenderAmount</Label>
    <Label TITLE="Fed Withholding" FORMAT="Percent">TransactionFederalWHPercent</Label>
    <Label TITLE="State Withholding" FORMAT="Percent">TransactionStateWHPercent</Label>
  </Labels>
  <Buttons>
    <Button>OK</Button>
  </Buttons>
</Confirmation>

```



</ConfirmationScreen>  
<Transaction ALLOWCONFIRMATION="Yes">

## 38. CopyClients

### Description

#### CopyClients Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<CopyClients> </CopyClients>	The opening and closing elements of the CopyClients business rule.		
	PRIMARYCOMPANY	Text.	Name of the Primary company.
<CopyClient>	CLIENTGUID	Text	
	MULTIFIELDS	Yes	Copy Multifields
		No	Do not copy Multifields.
<OverrideFields>			
<OverrideField>	NAME	Name of the Column/Field.	
	TYPE	Type of the Column/Field.	

## 39. CopyToAddressFields

### Description

This Business Rule allows one or more address variables to be copied from an activity to one or more PolicyFields

#### CopyToAddressFields Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<CopyToAddressFields> </CopyToAddressFields>	The required opening and closing elements of this business rule.		
	ADDRESSGUID	String	AddressGUID that data will be copied to. Not needed if only one Policy or data should be copied to all Segments.
<Fields>	Defines the Fields tag. Refer to the Transaction Configuration section of the Technical Manual, which contains further information about the <Fields> element and the available options.		
<From>	Name of ActivityField or Address Variable data is being copied from.		
<To>	Name of Address Field data is being copied to.		
<FromCollection>	Defines the collection of fields.		

### XML Example

```
<CopyToAddressFields ADDRESSGUID="AddressGUID">
  <Fields>
    <Field>
      <From>CountryCode</From>
      <To>NationCode</To>
    </Field>
```

```
</Fields>
</CopyToAddressFields>
```

## 40. CopyToBusinessRules

### Description

#### CopyToBusinessRules Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<CopyToBusinessRules> </CopyToBusinessRules>	The required opening and closing elements of the CopyToBusinessRules business rule.	
<Rules>		
<Rule>	KEY	Key value to find the old/existing business rule
<From>	New business rule coming from	
<Name>	Name of the old/existing business rule	

## 41. CopyToClientFields

### Description

This Business Rule allows one or more math variables to be copied from an Activity to one or more Client fields, upon processing the activity to which the 'CopyToClientFields' business rule is attached.

#### CopyToClientFields Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<CopyToClientFields> </CopyToClientFields>	The required opening and closing elements of CopyToClientFields business rule. <b>Note:</b> CLIENTGUID and POLICYROLES attributes are optional. If used, only either one of them can be present at the same time.		
	CLIENTGUID	Math variable	This attribute is used to specify the ClientGUID of the Client whose records are to be updated. <b>Note:</b> Transaction to which this business rule is attached should contain the MathVariables that captures the ClientGUIDs.
	POLICYROLES	Rolecode	This attribute is used to specify the RoleCodes (from AsCode=>AsCodeRole table), for which the data are to be copied to. <b>Note:</b> One or more Roles Codes can be specified in a Comma separated list.
<Client>	Optional; Repeatable element; Used to copy single or multiple data to a particular client or more than one clients. <b>Note:</b> When CLIENTGUID attribute is used with the <Client> element, CLIENTGUID and POLICYROLES attributes MUST not be used in the <CopyToClientFields> element.		
		MathVariable	Required attribute. This attribute is used to specify the ClientGUID of the Client whose records are to be updated.

			<b>Note:</b> Transaction to which this business rule is attached should contain the MathVariables that captures the ClientGUIDs.
<Fields>	Required element. Used to specify the MathVariables in Transactions from which the values should be copied from and Fields in Client screen to which values should be copied to. <b>Note:</b> If <Client> tag is used, then <Fields> tag should be present within the <Client> tags.		
<Field>	Repeatable element. The opening and closing tag that encompasses <From> and <To> or <FromCollection> and <To> tags. <b>Note:</b> Either <From> or <FromCollection> tag should be used. Both of them should not be present for a single <To> tag.		
<From>	Required element. This element is used to specify the MathVariable or Field name from the Transaction from where the data should be copied from.		
		MathVariable/ ActivityField	Required element value. Name of MathVariable or Field from the Transaction from where the data should be copied from.
<FromCollection>	Required element. This element is used to specify a MathVariable of Math type Collection. <b>Note:</b> A MathVariable of Type Collection contains a list of key-value pairs retrieved from the database.		
		MathVariable	Required element. Name of the MathVariable of Math Type, Collection that is defined in the Transaction, from where the data should be copied from.
<To>	Required element. This element is used to specify the Fields in the Client Screen to which the data should be copied to. <b>Note:</b> The value of the <To> tag will be saved in AsClient / AsClientField table in the database.		
		Field	Name of the Field in ClientScreen to which the value should be copied to.

## 42. CopyToPolicyFields

### Description

This Business Rule allows one or more math variables to be copied from an activity to one or more PolicyFields, upon processing the activity for which the 'CopyToPolicyFields' business rule is attached.

### CopyToPolicyFields Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<CopyToPolicyFields> </CopyToPolicyFields>	The required opening and closing elements of this business rule.		
	TYPE	The condition for copying to Policy Fields.	
		IFEMPTY	It is a condition for the data to be copied. Data is copied to Policy only if current

			PolicyField value is empty.
<Fields>	Required element. The Fields section is used to update a field in AsPolicyField table by passing the required information from the Transaction.		
<Field>	The <Field> tag is used to update a field in AsPolicyField table by passing the required information from the Transaction.		
<From>		String.	Name of ActivityField or MathVariable data is being copied from.
<To>		String	Name of PolicyField that data is being copied to. The value of the <To> tag will be saved in AsPolicy / AsPolicyField table in the database.

## XML Example

```
<CopyToPolicyFields>
  <Fields>
    <Field>
      <From>ReinsuranceIndicator</From>
      <To>ReinsuranceIndicator</To>
    </Field>
  </Fields>
</CopyToPolicyFields>
```

## 43. CopyToRoleFields

### Description

This Business Rule allows one or more math variables to be copied from an activity to one or more specified RoleFields, upon processing the activity to which the 'CopyToRoleFields' business rule is attached. Also indicates the ability to update multiple Roles through activity processing.

### CopyToRoleFields Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<CopyToRoleFields> </CopyToRoleFields>	<p>The opening and closing tag of the CopyToRoleFields Business Rule.</p> <p><b>Note:</b> If &lt;RoleArrays&gt; element is used and no &lt;Fields&gt; element(outside &lt;RoleArrays&gt; element) is used, then ROLEGUID and POLICYROLES attributes should not be present in the &lt;CopyToRoleFields&gt; element.</p> <p>If both &lt;RoleArrays&gt; and &lt;Fields&gt; elements (outside &lt;RoleArrays&gt; element) are used or if only &lt;Fields&gt; element is used, then ROLEGUID or POLICYROLES can be present in the &lt;CopyToRoleFields&gt; But only either one of them can be present at the same time.</p>		
	ROLEGUID	MathVariable	<p>This attribute is used to specify the ROLEGUID of the Client whose records are to be updated.</p> <p><b>Note:</b> Transaction to which this business rule is attached should contain the MathVariables that captures the RoleGUIDs.</p>

	POLICYROLES	RoleCodes	This attribute is used to specify the RoleCodes (from AsCode=>AsCodeRole table), for which the data are to be copied to. <b>Note:</b> One or more Roles Codes can be specified in a Comma separated list.
	TYPE	IFEMPTY	Indicates that data is copied to Role only if current RoleField (to which the data should be copied to) value is empty.
<RoleArrays>	Optional Element. <RoleArrays> tag is used to alter a set of roles using their ClientGUID instead of using their RoleCodes. <b>Example:</b> A policy may have two beneficiaries and two payees. Perhaps a single client is tied to the policy as one of the beneficiaries and one of the payees and the user may want to remove that client from the policy.		
<RoleArray>	Required Element. The opening and closing tag that encompasses <Fields>, <Field>, <From> and <To> or <FromCollection> and <To> tags. Indicates the ability to update the multiple Roles through activity processing.		
	NAME	RoleGUIDsMV	The attribute "Name" contains a list of RoleGUIDs defined in the math section of the transaction XML to which this business rule is attached to. <b>Note:</b> If it is an array, the length of the array of this attribute must match the length of the array of the <From> element.
<Fields>	Used to specify the MathVariables in Transactions from which the values should be copied from and Fields in Role screen/AsRoleField to which values should be copied to. <b>Important Note:</b> <Fields> tag can be used without <RoleArrays> (i.e. outside of <RoleArrays> tag). In that case, either ROLEGUID or POLICYROLES MUST be present in the <CopyToRoleFields> tag.		
<Fields>	The opening and closing tag that encompasses <From> and <To> or <FromCollection> and <To> tags. <b>Note:</b> Either <From> or <FromCollection> tag should be used. Both of them should not be present for a single <To> tag.		
<From>	This element is used to specify the MathVariable or Field name from the Transaction from where the data should be copied from.		
<FromCollection>	Defines the collection of fields		
		MathVariable/ ActivityField	Name of MathVariable or Field from the Transaction from where the data should be copied from.
<To>	This element is used to specify the Fields in the Role Screen to which the data should be copied to. <b>Note:</b> The value of the <To> tag will be saved in AsRole / AsRoleField table in the database.		
		Field	Name of the Field in RoleScreen to which the value should be copied to.

## XML Example

```
<CopyToRoleFields ROLEGUID="RoleGUID">
  <Fields>
    <Field>
      <From>SomeFieldInActivity</From>
      <To>SomeFieldInRole</To>
    </Field>
  </Fields>
</CopyToRoleFields>
```

## 44. CopyToSegmentFields

### Description

This Business Rule allows single or array of values to be copied from an Activity to one or more Segments (and one or more of their SegmentFields). A mathvariable or a field name can be used to place that single value to place into a segment field and an array can be used to place multiple values into multiple segments.

### CopyToSegmentFields Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<CopyToSegmentFields> </CopyToSegmentFields>	The required opening and closing elements of this business rule.		
<SegmentArrays>	Optional Element. <SegmentArrays> tag is used to update one or more fields of multiple segments at the same time. Using this element, the user can specify which segments are to be updated as well as which fields on each of those segments can be updated. Some of the fields that are to be updated may have a common name across segments, others may be distinct to a single, or only a few segments.		
<SegmentArray>	Required Element. The opening and closing tag that encompasses <Fields>, <Field>, <From> and <To> or <FromCollection> and <To> tags. Used to update the multiple Segments through activity processing.		
	NAME	SegmentGUIDs ArrayMV	The value of this attribute holds a list of SegmentGUIDs associated to that Policy. The MathVariable that holds the value is defined in the math section of the transaction XML to which this business rule is attached. <b>Note:</b> The size of this Array should match with the size of the Collection used in <FromCollection>.
<Fields>	Required, Repeatable element. Used to specify the MathVariables in Transactions from which the values should be copied from, and Fields in Segment screen to which values should be copied to. <b>Important Note:</b> <Fields> tag can be used without <SegmentArrays> (i.e. it can be used outside of <SegmentArrays> tag). In that case, processing the Transaction attached to this business rule will be able to update one or more fields of only one Segment at one time.		
<Field>	Required / Repeatable element. The opening and closing tag that encompasses <From> and <To> or <FromCollection> and <To> tags. <b>Note:</b> Either <From> or <FromCollection> tag should be used. Both of them should not be present for a single <To> tag.		

<From>	Required element: This element is used to specify the MathVariable or Field name from the Transaction from where the data should be copied from. <b>Note:</b> This tag should be used to copy a single value to one or more Segments.		
		MathVariable/ ActivityField	Name of MathVariable or Field from the Transaction from where*
<FromCollection>	Required element. This element is used to specify a MathVariable of Math type Collection. <b>Note:</b> This tag should be used to copy a list of values to one or more Segments. For e.g.. if there are two segments with the same FieldName Field1, but the value "A" should be copied to Segment1 and the value "B" should be copied to Segment2, then this tag should be used. A MathVariable of Type Collection contains a list of key-value pairs retrieved from the database.		
		Mathvariable	Name of the MathVariable of Math Type, Collection that is defined in the Transaction, from where the data should be copied.
<To>	Required element. This element is used to specify the Fields in the Segment Screen to which the data should be copied to. <b>Note:</b> The value of the <To> tag will be saved in AsSegment / AsSegmentField table in the database.		

## XML Example

```
<CopyToSegmentFields SEGMENTGUID="String" TYPE="IFEMPTY">
  <Fields>
    <Field>
      <FromSegment>String</FromSegment>
      <To>String</To>
    </Field>
  </Fields>
</CopyToSegmentFields>
```

## 45. CopyToWithholdingFields

### Description

This Business Rule allows one or more math variables to be copied from an Activity to one or more withholding fields.

### CopyToWithholdingFields Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<CopyToWithholdingFields> </CopyToWithholdingFields>	The required opening and closing elements of this business rule.		
	RELATEDGUID	String.	RelatedGUID of the Withholding Record (ex Policy:PolicyGUID, Plan:PlanGUID)
	TYPECODE	Code	(as defined in AsCode WithholdingTypeCode) of the Withholding record.
<Fields>	Identifies the Field Names that the data will be copied From/To		
<From>	Name of ActivityField or MathVariable data is being copied from.		
<To>	Name of Withholding Field data is being copied to.		

### XML Example

```
<CopyToWithholdingFields RELATEDGUID="Policy:PolicyGUID" TYPECODE="03">
  <Fields>
    <Field DISPLAY="Federal Percent" TYPE="Percent">
      <From>Zero</From>
      <To>FederalWithholding</To>
    </Field>
    <Field DISPLAY="Federal Flat Amt" TYPE="Money">
      <From>Zero</From>
      <To>FederalWithholdingAmt</To>
    </Field>
    <Field DISPLAY="State Taxable %" TYPE="Percent">
      <From>AdminServerStateTax</From>
      <To>StateWithholdingTaxable</To>
    </Field>
    <Field DISPLAY="State Flat Amt" TYPE="Money">
      <From>AdminServerStateFlat</From>
      <To>StateWithholdingFlat</To>
    </Field>
    <Field DISPLAY="State % Of Fed" TYPE="Percent">
      <From>AdminServerStatePercentageOfFed</From>
      <To>StateWithholdingPctOfFed</To>
    </Field>
  </Fields>
</CopyToWithholdingFields>
```



## 46. CreatePolicy

### Description:

The business rule is introduced to provide the ability to configure the activity-based creation of a new Policy based on the data elements of an existing Policy. One or more policies may be generated from a single source policy, although only one new policy per activity will be supported. All policies will be created with a current Policy Effective Date and in a pre-Issue state pending user review. CreatePolicy business rule will be attached to a non-reversible activity that will govern the creation of a new Policy based on an existing Policy.

### CreatePolicy Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description	Additional Information
<CreatePolicy>	The opening and closing tag of the CreatePolicy Business Rule.			
<Columns>	<b>Optional Element;</b> Opening tag for the Column section listing Policy columns. The column section contains the list of columns in the AsPolicy table except for PolicyGUID and UpdatedGMT. The PolicyGUID is generated when the record is written and the UpdatedGMT is set based on the date/time the record is written. A record will be added to AsPolicy table with the values for the specified columns when new policy is created upon processing the transaction with CreatePolicy br attached. A role, role code 11 (Service Representative) will be added to the role table. The person processing the transaction will be made the servicing representative. <Columns> tag within CreatePolicy is J2EE specific.			
<Column>	<b>Required Element;</b> Defines the column description. <Columns> tag within CreatePolicy is J2EE specific.	<b>NAME</b>	<b>String:</b> Mathvariable. Name of any math variable defined in the transaction.  <b>Required Attribute;</b>	Data type of the math variable value should be same as Column datatype.

		<b>TYPE</b>	<p><b>String:</b> Column name. Column name from AsPolicy table except for PolicyGUID and UpdatedGMT(Column name should be exact name of the column in the AsPolicy table)</p> <p><b>Required Attribute; String:</b> Decimal, Money, Percent, Integer, Date, and Text. Defines the Column data type which will hold the data type of the column in the AsPolicy table.</p>	
<b>&lt;Fields&gt;</b>	<p><b>Optional Element;</b> Opening tag for Dynamic Fields section listing Policy fields which add a record to AsPolicyFields when a new policy is created upon processing the transaction with CreatePolicy br attached. &lt;Fields&gt; tag within CreatePolicy is J2EE specific.</p>			
<b>&lt;Field&gt;</b>	<p><b>Required Element;</b> Opening tag for field definition block. &lt;Field&gt; tag within CreatePolicy is J2EE specific.</p>			
<b>&lt;FieldName&gt;</b>	<p><b>Required Element;</b> Defines name of the Field. &lt;FieldName&gt; tag within CreatePolicy is J2EE specific.</p>		<p><b>String:</b> Field name from AsPolicyField</p>	
<b>&lt;FieldType&gt;</b>	<p><b>Required Element;</b> Defines data type of the field. &lt;FieldType&gt; tag within CreatePolicy is J2EE specific.</p>		<p><b>String:</b> Decimal, Money, Percent, Integer, Date, and Text Defines the Field data type.</p>	
<b>&lt;FieldValue&gt;</b>	<p><b>Required Element;</b> Defines value of the field. &lt;FieldValue&gt; tag within CreatePolicy is J2EE specific</p>		<p><b>String:</b> Mathvariable. Name of any math variable defined in the transaction.</p>	

[illegible]

			<p>specified in this section.</p> <p>When the new policy has a different plan than the source policy, policy field names will be compared between the source policy and the new policy Policy Screen business rule field names. For all field names that match, the source policy data will be copied to the new policy.</p> <p><b>No</b> - Source policy values will not be copied to the new policy, all values must be explicitly specified.</p> <p>If this attribute is not present default is 'No'.</p>	
<b>&lt;Fields&gt;</b>	<p><b>Required element for the different plan;</b> Opening tag for listing Policy fields(Fixed and Dynamic fields). The fields section will be used to override the field values which get copied from the original policy.</p> <p><b>Note:</b> This element is required when 'COMPANY', 'PLAN', 'COPYSOURCE' attributes are not present in side the &lt;Policy&gt; element, at least PolicyName, IssueState fields should be configured.</p>			
<b>&lt;Field&gt;</b>	<p><b>Required element for the different plan;</b> Opening tag for Policy field definition block.</p>			
<b>&lt;From&gt;</b>	<p><b>Required Element;</b> Defines the field value passed from the source math variable or literal elements. Defines the value passed from any value of the transaction (math, collection reference, PolicyField, etc.) or a</p>		<p><b>String:</b> Math variable/Literal/Field name.</p> <p>The "From" value can be any value from the transaction (math, collection reference,</p>	

	literal value. Explicit reference will always take precedence over values copied from the source policy.		Policy:Field, etc.) or a literal value. Explicit reference will always take precedence over values copied from the source policy.	
<To>	<b>Required Element;</b> efines the name of the Policy field to which value will be passed from <From> element value.		<b>String:</b> Any valid Policy column/field name. The "To" value can be either a column name(AsPolicy) or a field name(AsPolicyField).	
<Segments>	<b>Optional Element;</b> Defines Segments to be created for the new policy. Indicates the start of the section listing Segment fields for Segment overrides and additions. These values will apply to all Segments created on the new policy.			
<Fields>	<b>Optional Element;</b> Opening tag for listing Segment fields. These values will apply to all Segments created on the new policy. <Fields> tag within Segments Tag is J2EE specific.			
<Field>	<b>Optional Element;</b> Opening tag for Segment field definition block. <Field> tag within Segments Tag is J2EE specific.			
<From>	<b>Required Element;</b> Defines the value passed from any math variable of the transaction or literal elements. <From> tag within Segments Tag is J2EE specific.		<b>String:</b> Math variable/Literal/Field name. Name of any math variable defined in the transaction.	
<To>	<b>Required Element;</b> Defines the name of the Segment field to which value will be passed from <From> element value. All matching field names in new segments will be filled with the specified value.		<b>String:</b> Any valid Segment field name. The "To" value can be Segment field name which is defined in SegmentName	

	<To> tag within Segments Tag is J2EE specific.		Business Rule.	
<Segment>	<p><b>Optional and Repeatable;</b> Indicates initializing the name of the Segment to be copied/created from the SegmentName table. <b>Note:</b> Repeated for each Segment to be created for the target Policy.</p>	<p><b>SEGMENTNAME</b></p> <p><b>COPYSOURCE</b></p> <p><b>COPYALLOLES</b></p>	<p><b>Required Attribute; String:</b> Segment name. SEGMENTNAME attribute will define the segment to be used Defines the name of the Segment to be copied/created as any valid SegmentName. The corresponding calculation rule for the segment name will be used to calculate the segment.</p> <p><b>Optional attribute;</b> Indicates whether to copy the policy segment from the source or create a new segment named by the SEGMENTNAME from the source policy. <b>Yes</b> - Specified Segment will be copied from the source policy. <b>No</b> - A new segment will be created which is not copied from the source policy. If this attribute is not present default is 'No'.</p> <p><b>Optional Attribute;</b> Indicates whether or not to copy all the segment roles from the source policy segment to the new policy segment. <b>Yes</b> - Segment roles will be copied from source policy. <b>No</b> - Segment roles will not be copied from Source policy. When this attribute is set to "No" to generate</p>	<p>If multiple segments of the specified type exist in the source policy, the same number of segments of that type will be created in the new policy.</p>

			Segment Roles each Segment section will have Roles section so that roles can be generated without being copied from the source. If this attribute is not present default is 'No'.	
<b>&lt;Roles&gt;</b>	<b>Optional Element;</b> Defines Segment Roles to be created for the new policy. Roles are supported by three options: ROLECODE, COPY.			
<b>&lt;Role&gt;</b>	<b>Repeatable element;</b> This element identifies Segment Roles to be created for the new policy. Repeated for each Segment Role to be created for the target Policy.	<b>ROLECODE</b>  <b>COPY</b>	<b>Required Attribute;</b> <b>Code:</b> As defined in AsCode table=>AsCodeRole.  <b>Optional Attribute;</b> <b>Yes</b> - All Segment Roles of this type will be copied from the source segment to the new policy. <b>No</b> - Segment roles will not be copied from the source policy. Creates new role.  If this attribute is not present default is 'No'.	
<b>&lt;Fields&gt;</b>	<b>Optional Element;</b> Opening tag for listing Role fields. The fields section will be used to override the field values which get copied from the original policy.			
<b>&lt;Field&gt;</b>	<b>Optional Element;</b> Opening tag for Role field definition block.			
<b>&lt;From&gt;</b>	<b>Required Element;</b> Defines the value to place in the field from any math variable of the transaction or literal elements, substituting for the source Role field value.		<b>String:</b> Math variable/Literal/Field name. Name of any math variable defined in the transaction.	

<b>&lt;To&gt;</b>	<b>Required Element;</b> Defines the target field name with any valid Role field name to which value will be passed from <From> element value.. Corresponding field names in new roles will be filled with the specified value and a valid Role field name.		<b>String:</b> Any valid Role field name.	
<b>&lt;Roles&gt;</b>	<b>Optional Element;</b> Indicates the opening element to identify the Roles section under the CreatePolicy tag. Roles will be supported via three options: copy all Roles, copy specified Roles by RoleCode, and add new Roles using supplied data.	<b>COPYALL</b>	<b>Optional Attribute;</b> Specifies whether or not to copy all the roles from the source policy. <b>Yes</b> - Indicates copy all the roles from the source policy. <b>No</b> - All Roles will not be copied from the source policy. Creates new roles.  If this attribute is not present default is 'No'.	
<b>&lt;Fields&gt;</b>	<b>Optional Element;</b> Start of section listing Role fields. These values will apply to all Roles created on the new policy. The fields section will be used to override the field values which get copied from the original policy.			
<b>&lt;Field&gt;</b>	<b>Optional Element;</b> Opening tag for Role field definition block.			
<b>&lt;From&gt;</b>	<b>Required Element;</b> Value to place in the Role field, substituting for the source Role field value.		<b>String:</b> Math variable/Literal/Field name. Name of any math variable defined in the transaction.	
<b>&lt;To&gt;</b>	<b>Required Element;</b> Defines the target field name with any valid Role field name to which value will be passed from <From> element value. All matching field names in new roles will be filled with the specified value and a valid Role field name.		<b>String:</b> Any valid Role field name.	



<b>&lt;Role&gt;</b>	<b>Optional and Repeatable element;</b> Identifies the Roles section under the CreatePolicy tag and defines the roles assigned for the clients in relation to a policy. Repeated for each Role to be created for the target policy.	<b>ROLECODE</b>  <b>COPY</b>	<b>Required Attribute; Code:</b> As defined in AsCode table=>AsCodeRole Identifies the value of the code associated with the role to be defined or copied. Applies to valid role code.  <b>Optional Attribute Yes</b> - Indicates that all role(s) are to be copied to the new policy. All the roles of this type on the source policy will be copied to the new policy. If not copied in COPYALL, copy roles for this Role Code from Source Policy to the New Policy. <b>No</b> - Indicates create a new role for this Role Code. Use the RoleScreen business rule to create any role fields for this Role Code.  If this attribute is not present default is 'No'.	
<b>&lt;Fields&gt;</b>	<b>Optional Element;</b> Opening tag for listing Role fields for this Role. The fields section will be used to override the field values which get copied from the original policy.			
<b>&lt;Field&gt;</b>	<b>Optional Element;</b> Opening tag for field definition block.			
<b>&lt;From&gt;</b>	<b>Required Element;</b> Value to place in the Role field, substituting for the source Role field value.		<b>String:</b> Math variable/Literal/Field name. Name of any math variable defined in the	

			transaction.	
<b>&lt;To&gt;</b>	<b>Required Element;</b> Name of the Role field. All matching field names in new roles will be filled with the specified value and any valid Role field name.		<b>String:</b> Any valid Role field name.	
<b>&lt;Allocations&gt;</b>	<b>Optional Element;</b> Defines Allocations to set for the new policy. This element initializes the field values and identifies the Allocations descriptions. Initializes the start of the section listing Allocation requirements.	<b>FUNDMAP</b>	<b>Optional Attribute String:</b> MathVariable. The name of the math variable containing the fund map. Name of the collection for the transaction that contains the mapping from the source policy fund to the new policy fund.	
<b>&lt;Allocation&gt;</b>	<b>Required Element;</b> Defines the description of allocations to be copied from the source policy to the new policy. Repeated for each Allocation to be created for the target Policy.	<b>ALLOCATION SOURCE</b>  <b>FROMTYPE</b>  <b>TOTYPE</b>	<b>Optional Attribute String:</b> Activity Allocation records will be copied from the allocations specified on the activity.  <b>Optional Attribute Code:</b> Any valid allocation type code.  <b>Required Attribute Code:</b> Any valid allocation type code.	
<b>&lt;Fields&gt;</b>	<b>Optional Element;</b> Opening tag for listing Allocation fields. The fields section will be used to override the field values which get copied from the original policy.			
<b>&lt;Field&gt;</b>	<b>Optional Element;</b> Opening tag for allocation field definition block.			
<b>&lt;From&gt;</b>	<b>Required Element;</b> Defines the Allocation activity field value copied from the source Allocation field.		<b>String:-</b> Math Variable/Literal/Field name	

<b>&lt;To&gt;</b>	<b>Required Element;</b> Defines the Allocation activity field as target of the copy function with a valid Allocation column name.		<b>String:</b> Allocation field name.	
<b>&lt;Comments&gt;</b>	<b>Optional Element;</b> Defines Comments to associate with the new policy. Creates and populates with data taken from either the source policy or from the activity itself.	<b>COPYALL</b>	<b>Optional Attribute</b> <b>Yes</b> - Copy all the comments from the source policy. <b>No</b> - Comments will not be copied from the source policy.  If this Attribute is not present the default is 'No'.	
<b>&lt;Comment&gt;</b>	<b>Optional Element;</b> Defines the comment to be added to the new policy.		<b>String:</b> Comment	
<b>&lt;BenefitSplits&gt;</b>	<b>Optional Element;</b> Defines specification of benefit split allocation details, allowing benefit split details to be divided between the existing policy and the newly created policy. These details should include the source segment, benefit split source type, benefit split target type, and percent (math variable).			
<b>&lt;BenefitSplit&gt;</b>	<b>Required element;</b> Child element of BenefitSplits which defines the description of the benefit split.	<b>FROMSEGMENTGUID</b>  <b>FROMTYPE</b>  <b>TOTYPE</b>  <b>PERCENT</b>	<b>Required Attribute;</b> <b>String.</b> Segment GUID/Mathvariable Mathvariable containing SegmentGUID defined in the transaction from which benefit split data will be retrieved.  <b>Required Attribute;</b> <b>Code:</b> A valid AsCodeAllocationType code value. The benefit split type of the source.  <b>Required Attribute;</b> <b>Code.</b> A valid AsCodeAllocationType	

			<p>. The benefit split type of the target.</p> <p><b>Required Attribute;</b> <b>String:</b> Any math variable/Literal Name of any math variable defined in the transaction. The percentage by which the source benefit split should be multiplied to determine the target benefit split.</p>	
<b>&lt;ActivitySchedules&gt;</b>	<p><b>Optional Element;</b> Defines Activity schedules to set for the new policy which will copy Activity schedules from the source policy to the new policy. The Activity schedules are identified by providing an activity GUID of a scheduled activity on the source policy. This element schedules activities out with allocations on them with same sort of allocations specification as is currently present for the policy allocations. If the current Contract does not have a specified Program, the ActivitySchedule should be ignored.</p>			
<b>&lt;ActivitySchedule&gt;</b>	<p><b>Required Element;</b> Indicates the opening tag to define the transaction elements used to find the most recent activity on the original policy which will be copied to the new policy. Multiple "Activity Schedule" elements can exist under "Activity Schedules".</p>	<b>TRANSACTION</b>	<p><b>Required Attribute</b> <b>String:</b> Transaction name Defines the Transaction Name and finds the most recent activity on the original policy which will be copied to the new policy.</p>	
<b>&lt;Fields&gt;</b>	<p><b>Optional Element;</b> The fields section will be used to override the field values which get copied from the original activity.</p>	<b>COPYSOURCE</b>	<p><b>Optional Attribute</b> <b>String:</b> Yes/No <b>Yes</b> - All the original fields are copied and can be overridden. <b>No</b> - The fields will not be copied and must be defined. If this attribute is not</p>	

			present default is 'No'.	
<b>&lt;Field&gt;</b>	<b>Optional Element;</b> Opening tag for activity field definition block.			
<b>&lt;From&gt;</b> >	<b>Required Element;</b> Defines the value of the Scheduled Activity field value as the source field for the copy function.	<b>TYPE</b>	<p><b>String:</b> Mathvariable/Literal/field name. Mathvariable or a field that has the value of the old RoleGUID when TYPE attribute set to "Map".</p> <p><b>Optional Attribute; = "Map"</b> Allows the GUIDs generated during processing are available in a mathvariable. Defines a mapping function from old GUID or field value (of old RoleGuid) and used to look up the value of the new generated GUID. This attribute is applicable when &lt;From&gt; is a OldGUID which is a mathvariable or a field that has the value of the old RoleGUID and is used to lookup the value of the new generated GUID. This mapping is only done when the attribute TYPE is set to the value MAP.</p>	
<b>&lt;To&gt;</b>	<b>Required Element;</b> Defines the Scheduled Activity field as target of the copy function.		<b>String:</b> Activity Field name.	
<b>&lt;Allocations&gt;</b>	<b>Optional Element;</b> Indicates the start tag and root for Allocations and defines elements for configuration.			

<b>&lt;Allocation&gt;</b>	<b>Required Element;</b> Indicates the opening to define the fields within the Allocation element and description.	<b>ALLOCATION SOURCE</b>  <b>FROMTYPE</b>  <b>TOTYPE</b>	<b>Optional Attribute = "Activity"</b> Allocation records will be copied from the allocations specified on the activity.  <b>Optional Attribute Code:</b> Any valid allocation type code.  <b>Required Attribute Code:</b> Any valid allocation type code.	
<b>&lt;Fields&gt;</b>	<b>Optional Element;</b> Start of section listing Allocation fields. The fields section will be used to override the field values which get copied from the original activity.			
<b>&lt;Field&gt;</b>	<b>Optional Element;</b> Start of a field definition block.			
<b>&lt;From&gt;</b>	<b>Required Element;</b> Start of section listing Allocation fields. The fields section will be used to override the field values which get copied from the original activity.		<b>String:</b> Math variable/Literal/Field name.	
<b>&lt;To&gt;</b>	<b>Required Element;</b> Defines the Allocation field to copy to.		<b>String:</b> Allocation field name.	

## CreatePolicy Database Tables

Table Name	Description
AsAddress	Stores client address information: physical address, email, phone
AsAddressField	Stores address information organized by guaranteed user identification
AsAddressRole	Associates a client with an address. Clients may have several addresses of varying types and several clients may share the same address.
AsClient	Stores personal information about Clients
AsCode	Contains a listing and description of all valid codes and their values
AsRole	Contains role information

## CreatePolicy Images

### XML Example

XML Example:

```
<CreatePolicy>
  <Policy PLAN="PlanName" COPYSOURCE="Yes">
    <Fields>
      <Field>
        <From>MVNewPolicyNumber</From>
        <To>PolicyNumber</To>
      </Field>
      <Field>
        <From>08</From>
        <To>StatusCode</To>
      </Field>
      <Field>
        <From>10-31-2006</From>
        <To>PlanDate</To>
      </Field>
      <Field>
        <From>01</From>
        <To>ReplacementType</To>
      </Field>
    </Fields>
  </Policy>
  <Segments>
    <Segment SEGMENTNAME="Deferred Annuity" COPYSOURCE="Yes" COPYALLROLES="No">
      <Fields>
        <Field>
          <From>SourceCompany</From>
          <To>TransferCompany</To>
        </Field>
        <Field>
          <From>Policy:PolicyNumber</From>
          <To>TransferPolicyNumber</To>
        </Field>
      </Fields>
    </Segment>
  </Segments>
  <Roles COPYALL="No">
    <Role ROLECODE="01" COPY="Yes"/>
    <Role ROLECODE="11" COPY="Yes"/>
    <Role ROLECODE="17" COPY="No">
      <Fields>
        <Field>
          <From>RoleClientGUID</From>
          <To>ClientGUID</To>
        </Field>
        <Field>
          <From>Activity:EffectiveDate</From>
          <To>RoleStartDate</To>
        </Field>
      </Fields>
    </Role>
  </Roles>
  <Allocations FUNDMAP="MVFundMapCollection">
    <Allocation FROMTYPE="Policy" TOTYPE="Policy"></Allocation>
    <Allocation FROMTYPE="10" TOTYPE="25">
      <Fields>
        <Field>
          <From>MVPercentInAllocation</From>
          <To>PercentInAllocation</To>
        </Field>
      </Fields>
    </Allocation>
  </Allocations>
  <Comments COPYALL="No">
```

```

    <Comment>Add this comment to the new policy</Comment>
  </Comments>
  <BenefitSplits>
    <BenefitSplit FROMSEGMENTGUID="799972FF-F4AC-0E2C-7D1E-11A337D9AF1E" FROMTYPE="05" TOTYPE="05"
      PERCENT="50"></BenefitSplit>
  </BenefitSplits>
  <ActivitySchedules>MVActivityCollection</ActivitySchedules>
  <ActivitySchedule TRANSACTION="AddPayAAB">
    <Fields COPYSOURCE="Yes">
      <Field>
        <From>ActivityEffectiveDate</From>
        <To>ActivityEffectiveDate</To>
        <DataType>Date</ DataType >
      </Field>
      <Field>
        <From>BeneClientGUID</From>
        <To>ClientGUID</To>
        <DataType>Text</ DataType >
      </Field>
    </Fields>
    <Allocations>
      <Allocation FROMTYPE="01,02,03,04,...etc">
        <Fields>
          <Field>
            <From>field Name</From>
            <To>Allocation field Name</To>
            <DataType>Text</ DataType >
          </Field>
        </Fields>
      </Allocation>
    </Allocations>
  </ActivitySchedule >
</ActivitySchedules>
<CreatePolicy>

```



## 47. CreateSegments

### Description

This Business Rule creates one or more new segments on a policy when attached to a transaction, when specific conditions are satisfied.

### CreateSegments Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description	Additional Information
<b>&lt;CreateSegments&gt;</b>	The opening and closing tag of the CreateSegments Business Rule.			
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> <ul style="list-style-type: none"> <li>Allows configuration of &lt;Tests&gt; to see if &lt;CreateSegment&gt; section of the rule should be invoked.</li> <li>When the &lt;Tests&gt; element is present within &lt;CreateSegments&gt; tag, the condition is applicable to all the &lt;CreateSegment&gt; elements. The creation of the all the segments depends on this particular Test condition's result.</li> </ul>			
<b>&lt;Test&gt;</b>	<b>Required/Repeatable Element;</b> Test Condition.		<b>Required element value; Expression</b> An expression to specify a condition.	All fields on segment screen can be used for test condition.  Literal values can also be used.
<b>&lt;CreateSegment&gt;</b>	<b>Optional Element;</b> Allows configuration of creating segments, this element is repeatable and can have more than one <CreateSegment> tags	<b>SEGMENTNAME</b>  <b>STATUSCODE</b>	<b>Required Attribute; String</b> Name of Segment being created (as defined in AsSegmentName table).	If the STATUSCODE attribute is not present, new

			<b>Code Value; Optional attribute;</b> STATUSCODE represents status (System defined Status like 24-Default Segment, 25-Non-Default Segment, 99-Inactive Segment etc) of the segment in which the segment should be created.	segment will be created with the default status code 24.
<b>&lt;Tests&gt;</b>	<b>Optional Element;</b> Allows configuration of test condition. When the <Tests> tag is present within a <CreateSegment> tag, the Test conditions are applicable only to that particular <CreateSegment> tag.			
<b>&lt;Test&gt;</b>	<b>Required/Repeatable Element;</b> Test Condition		<b>Required element value; Expression</b> An expression to specify a condition.	All fields on segment screen can be used for test condition.  Literal values can also be used.
<b>&lt;Fields&gt;</b>	<b>Required Element;</b> <Fields> tag is used to populate the Segment Fields of the Segments that are being created with values.			
<b>&lt;Field&gt;</b>	<b>Optional Element;</b> Defines the field description.			Only those Segment Fields that are mentioned here will get populated with specific values. Those Segment Fields that are not included in this section will remain as null.
<b>&lt;Name&gt;</b>	<b>Required Element;</b> Name of the SegmentField that will be populated.		<b>String</b>	

<b>&lt;Value&gt;</b>	<b>Required Element;</b> Name of ActivityField or MathVariable data that will be used to populate the SegmentField.		<b>String</b>	
----------------------	---	--	---------------	--

## XML Example

```

<CreateSegments>
  <Tests>
    <Test>Create = 1</Test>
  </Tests>
  <CreateSegment SEGMENTNAME="Accidental Death Benefit (ADB)">
    <Tests>
      <Test>CreateADB = 1</Test>
    </Tests>
    <Fields>
      <Field>
        <Name>SegmentActiveCode</Name>
        <Value>SegmentActiveCode</Value>
        <TypeCode>01</TypeCode>
      </Field>
      <Field>
        <Name>SegmentIssueDate</Name>
        <Value>SegmentIssueDate</Value>
        <TypeCode>02</TypeCode>
      </Field>
      <Field>
        <Name>SegmentAmount</Name>
        <Value>SegmentAmount</Value>
        <TypeCode>03</TypeCode>
      </Field>
    </Fields>
  </CreateSegment>
</CreateSegments>

```