New Pediatric Dental field in CPQ

New account submission to Independent Health
- The field will default to 'None' upon a new opportunity creation.
- The field is required to contain a 'Yes' or 'No' upon new account submission to coincide with the Pediatric dental attestation form submitted.
  - 'Yes' on the attestation form indicates the account **_has_** Pediatric dental through another carrier and does not need coverage from IH. The field in quoting tool should indicate 'No', indicating they do not need the coverage from IH.
  - 'No' on the attestation form indicates the account **_does not_** have Pediatric dental through another vendor and needs the coverage from IH. The field in the quoting tool should indicate 'Yes', indicating they need the coverage from IH.
  - The 'Pending' option would not be applicable in any scenario, therefore, please do not choose.
- This field is required to be populated with 'Yes' or 'No' upon submission to IH. If left as 'None', the following error will present:

The program reported the following error(s):
- Error:'Field: "Pediatric_Dental__c" of type "Opportunity" cannot be set to null', Error:'Missing required fields'. Missing required fields are: 'Pediatric Dental'

Renewal account submission to Independent Health
- When the IH account manager assigns opportunities to broker firms, this field will be populated based on whether the account has Pediatric dental with us today (Yes) or the account has the coverage with another carrier (No).
- When the opportunity indicates 'No', IH requires a new attestation from the account to indicate whether they have continued to obtain coverage elsewhere or now need IH to provide the coverage.
- In the event the account has coverage through us today (Yes), but wants to obtain coverage through a different carrier, the attestation form should be resubmitted indicating they have now obtained coverage elsewhere and the field should be changed to reflect a 'No'.

Opportunity Information : Enter required opportunity information.

This page lets you edit the opportunity information.

CREATE/EDIT OPPORTUNITY Save Cancel

Opportunity Information:

Account Name	Test Example		**Street**	123 Proposal Street
Opportunity Name	Test - 2016		**City**	Buffalo
Effective Date (this must be set to the first day of the month)	1/1/2016		**State**	NY
Product Type	Medical		**Zip/Postal Code**	14566
Type	New Plan Offering		**Pediatric Dental**	--None-- / --None-- / Pending / Yes / No

Save Cancel