

A woman with dark hair, wearing a light-colored shirt, is shown in profile from the chest up, looking down at a tablet computer she is holding with both hands. The background is a blurred cityscape with tall buildings. Overlaid on the lower left of the image is a semi-transparent data chart with a line graph and several data points. The text 'Agency Management 1.0.0' is centered in the upper right area of the image.

Agency Management 1.0.0

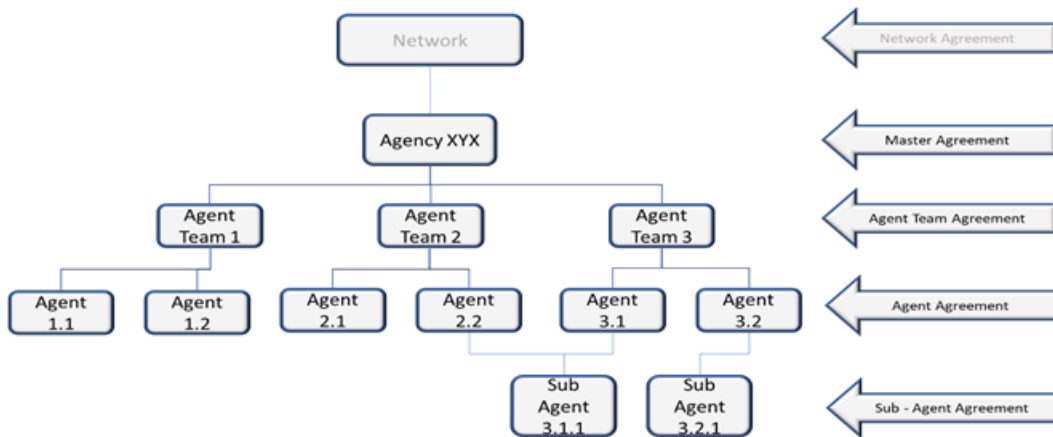
User Guide

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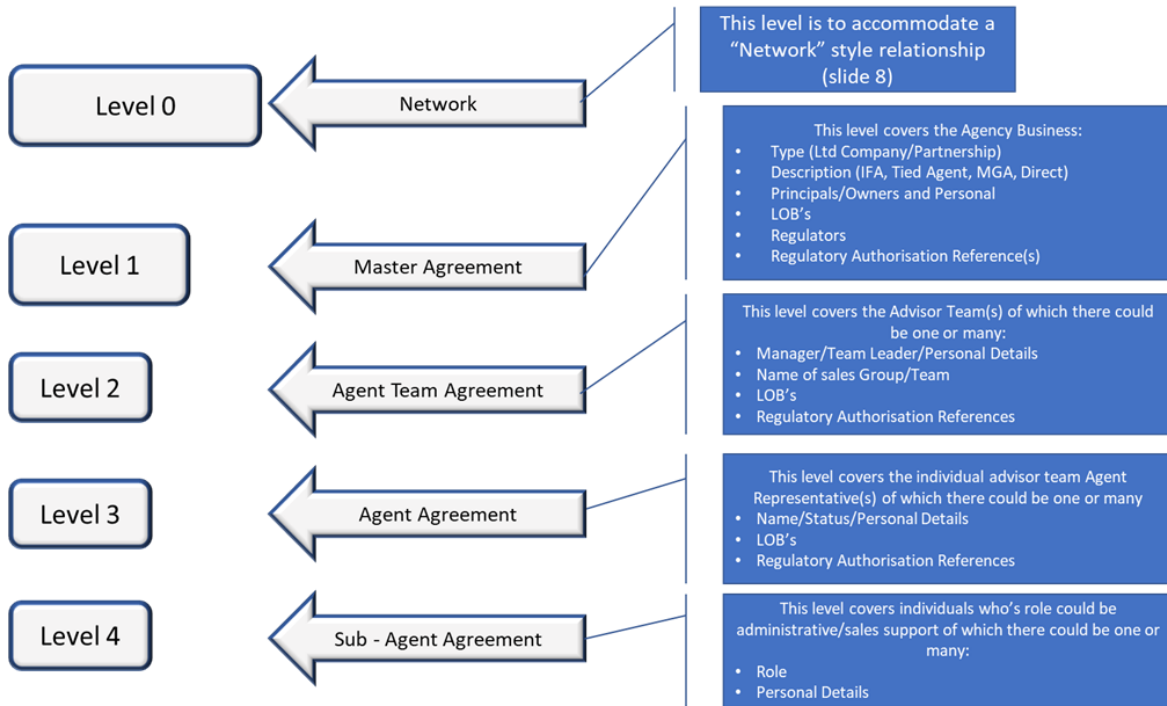
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Overview

An agency such as a managing general agent (MGA), a network, or an insurer looking to use the facility to manage its own advisor teams, can use the **Agency Management** module to configure a reporting structure, set up the permissions, authorization, overrides, persistency rules and other relevant management criteria. An example of an agency structure is given below.



The following diagram represents the base agency structure components from which a specific agency structure can be configured. It is a dynamic model that enable the agency configurator to deploy a structure with as many levels as required to support the actual agency. It includes reference to some of the attributes that apply at each level.



The Agency Management module offers the ability to add several agencies to a single structure over time.

The following are the agency set-up process steps:

1. Identify agency. Agency Management offers the ability to be able to identify that an agency has been registered and the data has been imported into the system for set up and checking;
2. Upload agency details. The agency details are imported and the agent can define and edit the structure;
3. Check agency details. The agent can make appropriate corrections and obtain any additional information;
4. Document production. This step refers to requesting and obtaining any additional evidence required relating to the agency that is required to complete the process;
5. Confirm agency. The product and services authorization of the agency firm is confirmed and the structure is set up and ready to be populated by individual agent representatives' records.

Installing Agency Management 1.0.0

Follow the guidelines below to install and configure **Agency Management 1.0.0**.

Prerequisites

Before installing **Agency Management 1.0.0**, make sure to install the following:

- **HPFI v22.1.0** or higher.
- **SySDigitalSolutionPackages v21.2.2301.zip** or higher.

Please follow the steps below to install **Agency Management 1.0.0**

Agency Management 1.0.0 Install

1. In **Innovation Studio**, import the **Agency Management 1.0.0** digital asset by following the steps described [here](#).
2. After the import is complete, install **Agency Management 1.0.0** as described in the [standard procedure](#).

NOTE

If there are any errors, the system displays a message with the reason why the package could not be imported. To see the warnings, consult the log of the selected deployment package. For more information, see [Viewing Deployment](#)

Package Logs.

3. Done!

Agency Management

In the Agency Management FintechOS Portal menu, The **Agency** section is found under **Quote and Apply**.

Upon clicking the **Agency** section, the following subsections unfold:

- The **Add Entity** subsection allows you to add a new entities from the already defined types.
- The **Entity List** subsection allows you to search for already created entities and retrieve the list containing them based on several filters.
- The **Organizational Chart** subsection displays the full set up sorted by hierarchy, in the form of a chart.

Add Entity

The Admin/FO user is able to create and add different entity types, in order to create a set up around them. To add an entity type, follow the steps below:

1. Log into the FintechOS Portal.
2. From the menu, click on **Agency > Add Entity**, where a form called **Add Entity** is displayed.
3. Select an entity type from the drop down, from the following options: Network, Company, Company Division, Company SubDivision.
4. Click the **Add Entity** button.
5. A new form opens with specific fields for each entity type in order to be filled in.

The drop down list has no preselected value. The options are displayed based on the rank of the entity types, from top (level 0) to bottom, in this case:

- Network: level/rank 0;
- Company: level/rank 1;
- Company Division: level/rank 2;
- Company Subdivision: level/rank 3.

Understanding Entities and their Hierarchy

The entities naming and hierarchy are configured in FintechOS Studio, and an unlimited number of entity types can be added.

The four entities are explained below:

- Network:
 - The network is optional in a set up and is only added if necessary;
 - You cannot define more than one network in a set up;
 - If a network is already added and the user wants to add another one, after clicking the **Add Entity** button, the following pop-up error message is displayed: "You cannot add more than one Network.". After you close the pop-up, the form resets the **Entity Type** field.
- Company:
 - You cannot add more than one Company if you haven't already added a network in the first place;
 - If you try to add a second Company, the following pop-up error message is displayed: "You must first add a Network if you want to add multiple Companies." After you close the pop-up, the form resets the **Entity Type** field.
 - You can add an unlimited number of companies in the set up, as long as they have a network added above them.
- Company Division and Company Subdivision:

- They are optional to be added in a set up;
- When you want to add new entities, the order in the hierarchy must be respected, from top to bottom. You cannot skip a level, except Level 0 (Network) which is optional if the set up has a single company;
- In order to add a company division, you need to firstly add a company above it;

In order to add a Company Subdivision, you need to firstly add a Company Division above it. For both cases, the error message from the system is the same: "You must first add the entities superior in the hierarchy, from top to bottom.". After you close the pop-up, the form resets the **Entity Type** field.

- You can add an unlimited number of company divisions and company subdivisions as long as they have parent entities above them added in the first place. A company can have an unlimited number of company divisions under it and a company division can have an unlimited number of company subdivisions under it.

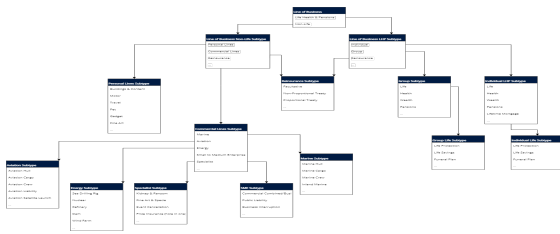
Adding Lines of Business

When adding entities, the Admin/FO user has the ability to add a line of business for the Company entity type. The **Line of Business** is an optional field.

For the Company Division entity, the structure of the line of business is inherited from the parent Company. In the form Company Division entities that are children of the Company for which a line of business was added, the **Line of Business** field is displayed along with the **Edit** button. You can either keep the line of business in the same form or choose a subset of those inherited from the parent Company.

The same applies to the Company Subdivision entities that are children to a Company Division that have a defined line of business. The structure of the line of business is inherited from the parent Company Division. In the form of the Company Subdivision entity where a line of business is defined for the parent Company Division entity, the **Line of Business** field is displayed along with the **Edit** button. You can either keep the line of business in the same form or choose a subset of those inherited from the parent Company Division.

The structure, the ramification for the line of business for a set up is configurable in FintechOS Studio, as presented below.



Adding a Company Form

In the **Add Company** form, an **Add** button is displayed next to the **Line of Business** label.

Click the **Add** button, in order to display a form called **Add Line of Business**. This form contains the line of business tree, from which you can select the desired configuration.

1. If you select an option from the line of business tree that has parents above, these are automatically selected as well. The children of the option are not selected. For example, if you select the Life Protection option, the system automatically selects the Life, Individual, and Life Health & Pensions options.
2. If you select a parent option, all the children under it are automatically selected. You can deselect some of the child options if they are not necessary. For example, if you select the Life option, the system automatically selects all its children under it: Life Protection, Life Savings and Funeral Plan.
3. If you deselect a parent option, all its children are automatically deselected.
4. If a parent option remains without selected children, the parent also gets deselected.

At the bottom of the **Add Line of Business** form, the **Cancel** and **Save** buttons are displayed.

- When you click the **Cancel** button, this returns you to the **Add Company** form, and no changes are saved.

- When you click the **Save** button, this returns you to the **Add Company** form and the changes are saved.

The **Add** button is displayed as long as you don't save the line of business. After you save the line of business, the **Add** button is replaced with the **Edit** button.

If you save a line of business, you can enter it again by clicking the **Edit** button, and deselecting all options. In this case, if saved, it is considered that the Company does not have a line of business defined and the **Edit** button becomes **Add** again.

Adding a Company Division Form

After you or the system automatically selects the parent entity of a Company Division, the Line of Business field and the corresponding button are displayed.

The system checks if the parent entity of the Company Division has a line of business defined, added or saved.

- If not, the **Line of Business** field and the corresponding button are not displayed for the Company Division;
- If yes, the **Line of Business** field is displayed, and the **Edit** button is displayed next to the **Line of Business** label. When you click the **Edit** button, the system displays a form called **Edit Line of Business**. This contains the line of business tree inherited from the parent entity, where only the options checked for the parent entity are displayed, and not the whole tree as for the Company.

Regarding the ramification, the line of business, a child entity can have equal or less than its parent entity, so you are able to keep the desired configuration for the Company Division, inherited from the Company. You are also able to deselect options, and in this way to remain with a subset of those inherited.

You are not able to deselect all the inherited options for the Company Division. In this case, a the following blocking message is displayed: "You must choose at least one option from the inherited line of business configuration."

Regarding the way of working, the same principle applies here as for the Company, with the only difference that for the Company Division all the inherited options come preselected.

If you choose to remove the saved line of business from the parent entity, the **Line of Business** field, the **Edit** button and the inherited line of business configuration are removed.

At the bottom of the **Edit Line of Business** form, the **Cancel** and **Save** buttons are displayed.

- When you click the **Cancel** button, this returns you to the Add Company Division form, and no changes are saved.
- When you click the **Save** button, this returns you to the Add Company Division form and the changes are saved.

Adding a Company Subdivision Form

After you or the system automatically chooses a parent entity for the Company Subdivision you want to add, the **Line of Business** field and the corresponding button are displayed.

The system checks if the parent entity of the Company Subdivision has a saved line of business.

- If not, the **Line of Business** field and the corresponding button are not displayed for that Company Subdivision;
- If yes, the **Line of Business** field is displayed, and the **Edit** button is displayed next to the **Line of Business** label. When you click the **Edit** button, the system displays a form called **Edit Line of Business**. This contains the line of business tree inherited from the parent entity, where only the options checked for the parent entity are displayed, and not the whole tree as for the Company.

Regarding the ramification, the line of business, a child entity can have equal or less than its parent entity, so you are able to keep the inherited configuration for the Company Subdivision, from the Company Division. You are also able to deselect options, and in this way to remain with a subset of those inherited.

You are not able to deselect all the inherited options for the Company SubDivision. In this case, the following blocking message is displayed: "You must choose at least one option from the inherited line of business configuration."

Regarding the way of working, the same principle applies here, as for the Company Division.

If you choose to remove the line of business configuration saved in the first place for the parent Company entity, the **Line of Business** field, the **Edit** button and the line of business configuration inherited by the entities under it are removed.

At the bottom of the **Edit Line of Business** form, the **Cancel** and **Save** buttons are displayed.

- When you click the **Cancel** button, this returns you to the Add Company Subdivision form, and no changes are saved.
- When you click the **Save** button, this returns you to the Add Company Subdivision form and the changes are saved.

Adding Entities

Understanding Parent Entity Rules

An entity can be called a parent entity if it is referenced by a child entity, if it has a child entity under it. An entity can be called a child entity, if it has a parent entity attached above it.

Rules regarding the **Parent Entity** field:

- When you want to add a Network, the system automatically fills this field with the Null value, and it is not editable afterwards. This is because the Network is the first hierarchical level, cannot have a parent entity;
- After you add a Network and you want to add one or more Companies, the system automatically fills this field, for all the Companies under it, with the name of the Network added initially and it is not editable afterwards;
- When you want to add a Company in the first place, without having added a Network, the system automatically fills this field with the Null value, and it is not editable afterwards. This is because, in this case, the Company is the first hierarchical level, and it does not have a parent entity above it;
- When you add a Company in the first place, without having added a Network, and afterwards you add a Network, the system automatically changes the parent entity for that Company from Null into the name of the Network, and it is not editable afterwards;
- When you want to add one or more Company Divisions after a single Company was already added initially, the system automatically fills this field, for all the Company Divisions, with the name of the Company added initially and it is not editable afterwards, because a single parent entity is available, the Company;
- When you want to add one or more Company Divisions after already adding more than one Company, the system automatically provides for this field, for all the Company Divisions, a dropdown list with all the names of the already added Companies, in order for the user to choose the parent entity for the Company Divisions that you wants to add. After choosing and saving, the field remains editable. In the first place, the field does not display a preselected value.
- When you want to add one or more Company SubDivisions after already adding a single Company Division , the system automatically fills this field, for all the Company SubDivisions, with the name of the Company Division added initially. It is not editable afterwards, because a single parent entity is available, the Company Division;

- When you want to add one or more Company SubDivisions after already adding more than one Company Divisions, the system automatically provides for this field, for all the Company SubDivisions, a dropdown list with all the names of the already added Company Divisions, in order for you to choose the parent entity for the Company SubDivisions that you wants to add. After choosing and saving, the field remains editable. In the first place, the field does not display a preselected value.

NOTE

You are able to change the parent entity initially designated only with a parent entity immediately superior in rank. This case is valid only for Company Divisions and Company SubDivisions, because only these entity types can have multiple options to choose as parent entity.

Adding a Network

In order to build a Set Up, the highest level, Level 0, regarding entity types that can be defined in a hierarchy is the Network type.

1. Select **Network**.
2. Click **Add Entity**.
3. The **Add Network** form is displayed with the specific fields for this type if entity.
4. Fill in the fields:

Field Name	Description
Parent entity	The parent entity. Mandatory field.
Name	The name of the network. Mandatory field.
Number	The number of the network.

Field Name	Description
Type	Option set, having the following values: Public Limited Company, Limited Liability Company, Private Limited Company, Partnership. Only one option can be selected.
Core business type	Option set, having the following values. Insurer, Reinsurer, Broker, MGA, Insurance TPA, Bank, Lloyd's of London Syndicate, Accountant, Law Attorney, Aggregator. Only one option can be selected.
Registered Address	The registered address of the network. Mandatory field.
Website	The hyperlink to the website of the network.
Number scheme	Option set, having the following values: Dun & Bradstreet, Zoominfo. Only one option can be selected.
Regulators/Supervisors	Option set, having the following values: FCA Financial Conduct Authority UK, MAS Monetary Authority Singapore, BMA Bermuda Monetary Authority, ICAEW, Law Society, ASF Autoritatea de Supraveghere Financiara, BaFin Germany, UKNF Poland. Multiple options can be selected.

Field Name	Description
Regulator Reference Number	This field becomes visible, below a Regulator/Supervisor, only for the Regulators/Supervisors that you choose and it is mandatory to be filled for them, otherwise the following message is displayed upon clicking Save : "Please fill in the Regulator Reference Number for the selected Regulators/Supervisors.". You can deselect the selected Regulator/Supervisor and in this case the Regulator Reference Number field is not displayed anymore.

5. Click the **Save** button. The record is saved only if all the mandatory fields are filled in, otherwise a blocking message is displayed: "You need to fill in all fields marked with (!) before you can save the entity!".
6. After the company record is saved the form closes and the following message is displayed: "The Network was successfully added.".
7. You are directed to the previous **Add Entity** form.
8. Alternatively, click the **Cancel** button in order to close the form without saving any data. A confirmation message is displayed: "Are you sure you want to cancel?". After confirming, you are redirected to the **Add Entity** form.

Adding a Company

The first level, Level 1 regarding the entity types that can be defined in a hierarchy is the Company type.

1. Select **Company**.
2. Click **Add Entity**.

3. The **Add Company** form is displayed with the specific fields for this type if entity.
4. Fill in the fields:

Field	Description
Name	The name of the company.
Number	The Company Type.
Type	Option set, having the following values: Public Limited Company, Limited Liability Company, Private Limited Company, Partnership. Only one option can be selected.
Core business type	Option set, having the following values: Insurer, Reinsurer, Broker, MGA, Insurance TPA, Bank, Lloyd's of London Syndicate, Accountant, Law Attorney, Aggregator. Only one option can be selected.
Agency type	Option set, having the following values: MGA Managing General Agent, IFA Independent Financial Advisor, Multi-Tied Insurance Agent, Tied Insurance Agent, DSF Direct Sales Force, RA Restricted Advisor, Employee Benefits Consultancy, Bancassurer. Only one option can be selected. This field is displayed as disabled until you choose one of the following options for the Core Business Type attribute above: Broker, MGA, Lloyd's of London Syndicate or Aggregator. If you do not choose one of these options or any option at all, the field stays disabled.
Address	The address of the company.

Field	Description
Website	Hyperlink to the company's website.
Number scheme	Option set, having the following values: Dun & Bradstreet, Zoominfo. Only one option can be selected.
Tax identification number (TIN)	The tax identification number of the company.
Line of business	Add a line of business.
Regulators/Supervisors	Option set, having the following values: FCA Financial Conduct Authority UK, MAS Monetary Authority Singapore, BMA Bermuda Monetary Authority, ICAEW, Law Society, ASF Autoritatea de Supraveghere Financiara, BaFin Germany, UKNF Poland. Multiple options can be selected.
Regulator Reference Number	This field becomes visible, below a Regulator/Supervisor, only for the Regulators/Supervisors that you choose and it is mandatory to be filled for them. If not, the following message is displayed upon clicking the Save button: "Please fill in the Regulator Reference Number for the selected Regulators/Supervisors.". You can deselect the selected Regulator/Supervisor and in this case the field Regulator Reference Number is not displayed anymore.

5. Click the **Save** button. The record is saved only if all the mandatory fields are filled in, otherwise a blocking message is displayed: "You need to fill in all fields marked with (!) before you can save the entity!".

6. After the company record is saved the form closes and the following message is displayed: "The Company was successfully added."
7. You are directed to the previous **Add Entity** form.
8. Alternatively, click the **Cancel** button in order to close the form without saving any data. A confirmation message is displayed: "Are you sure you want to cancel?". After confirming, you are redirected to the **Add Entity** form.

Adding a Company Division and Company Subdivision

The levels 2 and 3 regarding the entity types that can be defined in an hierarchy are the Company Division (Level 2) and the Company SubDivision (Level 3) types.

1. Select **Company Division** or **Company Subdivision**.
2. Click **Add Entity**.
3. The **Add Company Division**, respectively **Add Company Subdivision** form is displayed with the specific fields for this type of entity.
4. Fill in the fields:

Field	Description
Field Name	Options
Parent entity	The parent entity of the division or subdivision. Mandatory field.
Name	The name of the division or subdivision. Mandatory field.
Business Address	Inherited from the parent entity, but editable. Mandatory field.
Phone number	The phone number of the division or subdivision.
Line of business	Add the line of business.

5. Click the **Save** button. The record is saved only if all the mandatory fields are filled in, otherwise a blocking message is displayed: "You need to fill in all fields marked with (!) before you can save the entity!".
6. After the company record is saved the form closes and the following message is displayed: "The Company Division was successfully added.", respectively "The Company Subdivision was added".
7. You are directed to the previous **Add Entity** form.
8. Alternatively, click the **Cancel** button in order to close the form without saving any data. A confirmation message is displayed: "Are you sure you want to cancel?". After confirming, you are redirected to the **Add Entity** form.

Entity List

In order to view the list of networks, companies, companies divisions and subdivisions, log in to FintechOS Portal, and access the **Entity List** submenu.

ENTITY LIST

Entity Type Search

EntityType	Name	Parent entity	Level
Q	Q	Q	Q
Network	Network		0
Company	Company	Network	1
Company Division	Company Division	Company	2
Company Subdivision	Company Subdivision	Company Division	3

Follow the steps described below for every entity type.

Viewing the Network List

1. Access the **Entity List** submenu and search for the **Network** entity type. If no Network is created, the following message is displayed: "No records found."
2. If there are created records, a grid with the created Companies are displayed, containing the following columns:
 - Name;
 - Number;
 - Type;
 - Core Business Type;
 - Registered Address;
 - Number Scheme.

Every column has a search function at the top.

3. Double click a record from the grid to open the edit mode of a Network entity. All fields are editable, except the **Parent Entity** field. You can now add a Line of Business if you haven't already when you first created the record.
4. Click the **Save** button.
5. Alternatively, click the **Cancel** button, and the form is closed without saving any changes.

Viewing the Companies List

1. Access the **Entity List** submenu and search for the **Company** entity type. If no Company is created, the following message is displayed: "No records found."
2. If there are created records, a grid with the created Companies are displayed, containing the following columns:

- Name;
- Parent entity;
- Number;
- Type;
- Core business type;
- Agency type;
- Address;
- Number scheme.

Every column has a search function at the top.

3. Double click a record from the grid to open the edit mode of a Company entity. All fields are editable, except the **Parent Entity** field. You can now add a Line of Business if you haven't already when you first created the record.
4. Click the **Save** button.
5. Alternatively, click the **Cancel** button, and the form is closed without saving any changes.

Viewing the Company Division and Company Subdivision List

1. Access the **Entity List** submenu and search for the **Company Division** or the **Company Subdivision** entity type. If no Company Division or Company Subdivision is created, the following message is displayed: "No records found."
2. If there are created records, a grid with the created company divisions and subdivisions are displayed, containing the following columns:

- Name;
- Parent entity;
- Business Address.

Every column has a search function at the top.

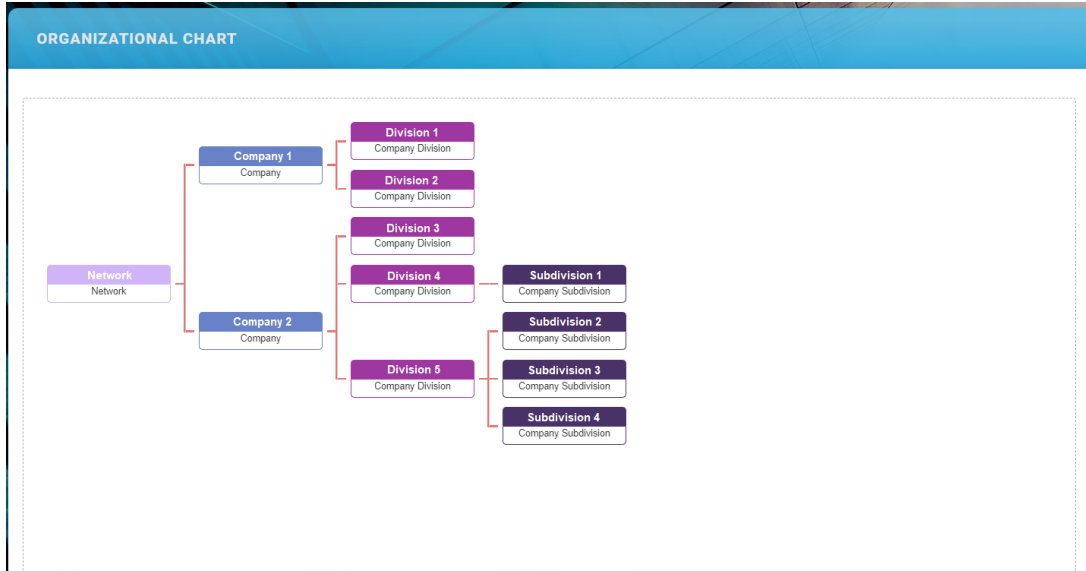
3. Double click a record from the grid to open the edit mode of a Company Division, respectively a Company Subdivision entity. All fields are editable, except the **Parent Entity** field. You can now add a Line of Business if you haven't already when you first created the record.
4. Click the **Save** button.
5. Alternatively, click the **Cancel** button, and the form is closed without saving any changes.

Organizational Chart

Agency Management gives you the ability to visualize the Set Up in a form of an organizational chart, in order to have a better view regarding it.

1. Log into the FintechOS Portal.
2. From the menu, click on **Agency > Organizational Chart**.
3. The **OrgChart** section is displayed. Here, all the created entities can be visualized in real

time.



The following are the chart properties:

- If there are no created entities, the following message is displayed: "No records found."
- The entities are displayed from top to bottom, taking into consideration the Level, starting with Level 0, if it exists.
- for each entity from the chart, the user will have the possibility to expand or narrow its children
- If an entity does not have children, the possibility of expanding is not displayed.
- When you enter the **Organizational Chart** submenu, the default display is as following: only the children of the first level in the Set Up are displayed, so only the first level is expanded. If the you want to see more from the Set Up, you must expand the next levels
- For each entity, a box is displayed, containing:
 - The name of the entity;
 - The entity type;
 - The number of its children, if there are any.

- For each Level of the Set Up, in the right part of the chart, Level X is displayed, where X represents the number of the Level:
 - If the Set Up starts with a Network, the chart starts with Level 0.
 - If the Set Up starts with a Company, the chart also starts with Level 0, which is empty. Level 0 is displayed on the right part, and the Company is placed at Level 1

Agency Management Libraries and Scripts

The following libraries and scripts are used in the Agency Management solution.

Client Side Script Libraries

FTOS_INS_AgentLib

This library contains different functions for the Agent insert, edit and import forms.

Used in: Form Driven Flow: `FTOS_INS_AddAgentForm`, `FTOS_INS_EditAgentForm`.

The following functions are available in this library.

`setAgentFullName()`: This function saves the full name of the agent in the Agent entity, concatenated in the form of "firstname LASTNAME".

Input parameters: N/A

Output parameters: N/A

`setAgentFullNameAndBusinessStatus()`: This function saves the full name of the agent in the Agent entity, concatenated in the form of "firstname LASTNAME", and updates the Agent Status attribute with the "Certified" value from the Agent Status ID entity.

Input parameters: N/A

Output parameters: N/A

`createSystemUser()`: This function is used to create a new system user with the data from the Agent form and update the `systemUserId` attribute value in the Agent entity. It calls the `FTOS_INS_CreateSystemUser` server script.

Input parameters: N/A

Output parameters: N/A

FTOS_INS_UtilsLife

This library contains different utils functions used in the Agency Management scripts.

Used in: Form Driven Flow: Form Driven Flow: `FTOS_INS_AddAgentForm`, `FTOS_INS_EditAgentForm`.

The following functions are available in this library.

`emailValidationHtmlNotification()`

This function is used to insert a notification directly in form HTML when the email format is invalid.

Input parameter: N/A

Output parameter: Adds a div in the form's HTML code.

`validateEmail(email)`

This function is used to validate the email format.

Input parameter: email - the email to be validated.

Output parameter: True or false.

`trimTextFieldsSpaces()`

This function is used to trim the empty spaces in a field.

Input parameter: N/A

Output parameter: N/A

`getTextAttributesNamesFromCurrentPage()`

This function is used to get attribute names from the text fields in the page.

Input parameters: N/A

Output parameter: An array with the names of the attributes that are of the text type in the opened page.

FTOS_INSAM_AddElementsLib

This library contains the generation and value-fixing functions.

Used in:

- Form Driven Flows: `FTOS_INSAM_AddNetwork`, `FTOS_INSAM_AddCompany`, `FTOS_INSAM_AddCompanyDivision`, `FTOS_INSAM_AddCompanySubdivision`;
- Custom Flows: `FTOS_INSAM_AddEntityForm`, `FTOS_INSAM_EntityList`.

The following functions are available in this library:

`setParentEntityValues()`: This function sets the parent entity field values depending on the entity type.

Input parameters: N/A

Output parameters: N/A

`setButtons()`: This function sets the **Save** and **Close** buttons in the **Add Entity** form.

Input parameters: N/A

Output parameters: N/A

`setRegulatorsSupervisors()`: This function sets the **Regulators and Supervisors** dynamic checkboxes.

Input parameters: N/A

Output parameters: N/A

`generateDynamicCheckboxes(RSID, e1Val, e1ReferenceNumber, res)`: This function generates the dynamic checkboxes for **Regulators and Supervisors**.

Input parameters:

- RSID;
- e1Val;
- e1ReferenceNumber;
- res.

Output parameters: N/A

`checkReferenceNumberValues()`: This function checks the **Reference Number** field values and whether the boxes are checked or not in order to properly display the fields when needed.

Input parameters: N/A

Output parameters: N/A

`saveUpdateRegulatorsSupervisors()`: This function inserts or updates the **Regulators and Supervisors** data into the database based on the context.

Input parameters: N/A

Output parameters: N/A

`syncWithAgencyAdmin()`: This function syncs the agency admin data with the entity data.

Input parameters: N/A

Output parameters: N/A

`closeWindowOrGoBack()`: This function is used to pop a message on the screen depending on the clicked button.

Input parameters: N/A

Output parameters: N/A

`generateHtmlSelectField(elemId, listItems, defaultText)`: This function generates the select field in the form containing the options of entity types.

Input parameters:

- elemId
- listItems
- defaultText

Output parameters: N/A

`disableElemBasedOnSelect()`: This function disables the button if no entity is selected.

Input parameters: N/A

Output parameters: N/A

`addEntityClickEvent(htmlSelectId, btnId, optionSetItems)`: This function enables the click event for the **Add Entity** button that opens the insert form in a new window.

Input parameters:

- `htmlSelectId`
- `btnId`
- `optionSetItems`

Output parameters: N/A

`checkSelectedEntityTypeValidity(selectedValue, optionSetItems, result)`: This function is used to check if the selected entity type meets the validations for entity types, or shows an error if it's not valid.

Input parameters:

- `selectedValue`
- `optionSetItems`
- `result`

Output parameters: N/A

`generateGridForAllEntities(htmlGridId, optionSetItem)`: This function generates a grid with all entities.

Input parameters:

- `htmlGridId`
- `optionSetItem`

Output parameters: none

`setSearchBtnEvent(htmlSelectId, htmlGridId, btnId, optionSetItems)`: This function generates a grid for the entity that is selected in the select field.

Input parameters:

- htmlSelectId
- htmlGridId
- btnId
- optionSetItems

Output parameters: N/A

`generateSelectedEntityTypeGridWithRowDbClick(gridId, fetchObj, viewName, selectedValue, optionSetItems)`: This function generates a grid for the selected entity type value. Double clicking on a row opens the related edit form.

Input parameters:

- gridId
- fetchObj
- viewName
- selectedValue
- optionSetItems

Output parameters: N/A