

# **DRIVE SAFE WARRANTY PORTAL – SYSTEM FLOW DOCUMENTATION**

**For Development Team**

**Version 1.0**

## **1. SYSTEM OVERVIEW**

Drive Safe Warranty is building a centralized portal to manage:

1. **Drive Safe's internal operations**
2. **Showroom partners (car dealerships)**
3. **End-customers (vehicle buyers who purchased extended warranty)**

The system will consist of **three access layers**:

1. **Drive Safe Admin Panel (Super Admin)**
2. **Showroom Portal (Partner Portal)**
3. **Customer Portal**

Each layer has separate features, permissions, user roles and UI identity.

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## **2. USER TYPES & PERMISSIONS**

### **2.1 Drive Safe Admin (Super Admin)**

Drive Safe internal staff who have full control.

#### **Key Capabilities:**

- Create / manage showroom accounts
- Assign custom pricing per showroom for each warranty package
- View total sales per showroom
- View detailed customer information & uploaded documents
- Upload required documents to customer files
- Access full warranty record for each customer
- Trigger invoice generation to showrooms
- View invoice history

- Manage package definitions
  - Manage branding for each showroom portal (logo, name, colors)
  - Access reports and financial summaries
  - Manage customer access after 6 months
  - View all system logs & activity
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## **2.2 Showroom Partner User**

Each showroom gets its own login portal with its own **branding (logo + name)**.

### **Key Capabilities:**

- View their dashboard (warranty sales, earnings they owe, recent customers)
- Manually create a new warranty sale entry
- Upload documents for each customer (purchase documents, invoice, car details etc.)
- View invoices generated for them automatically
- Download invoices
- Update customer files during the first 6 months
- See list of all customers who purchased Drive Safe warranty through them
- Access plan pricing set by Drive Safe for their showroom

### **Showrooms cannot:**

- Edit the warranty pricing on their own
  - View other showrooms' sales
  - Access Drive Safe-level reports
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## **2.3 End-Customer**

A customer who has purchased extended warranty from the showroom.

### **Customer Access Rules:**

- Customer gets access to their portal immediately after purchase

- **First 6 months:** customer portal managed by showroom
- **After 6 months:** showroom loses access to that customer; Drive Safe takes over

#### **Customer Portal Capabilities:**

- View their warranty details and coverage
  - Upload documents (optional if required by Drive Safe)
  - View uploaded documents (by showroom or Drive Safe)
  - See warranty expiration, package, start/end date
  - Submit service/warranty enquiries
  - View claim status (if applicable in future versions)
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### **3. SYSTEM FLOW**

#### **3.1 Drive Safe Admin Creates a Showroom**

1. Admin logs into Drive Safe Admin Panel
2. Navigates to **Showrooms Management**
3. Creates a new showroom entry:
  - Showroom Name
  - Address
  - Contact Person
  - Email / Login Credentials
  - Upload Showroom Logo
4. Admin assigns **custom warranty pricing** for this showroom:
  - Silver (1, 2, 3 years)
  - Gold (1, 2, 3 years)
  - Platinum (1, 2, 3 years)
5. Showroom is now active and receives login details
6. Showroom portal displays **their name + their logo**

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### 3.2 Showroom Logs In & Creates Warranty Sale

1. Showroom logs into their branded portal
2. Clicks **Create New Warranty Sale**
3. Enters:
  - Customer Full Name
  - Customer Email + Phone
  - Vehicle Details (Make, Model, Year, Mileage, VIN)
  - Warranty Package Purchased (Silver/Gold/Platinum + Duration)
  - Price auto-filled based on Drive Safe's custom pricing
4. Uploads supporting documents:
  - Customer Invoice
  - Warranty Purchase Order
  - Vehicle Inspection Report
  - Any other document
5. Submits warranty sale
6. System triggers:
  - A new Customer Profile created
  - Customer receives login credentials instantly
  - Warranty start date begins
  - Warranty end date set automatically

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### 3.3 Automatic Invoice Generation to Showrooms

Every time a showroom makes a sale:

1. System generates an invoice **to the showroom**
2. Invoice includes:

- Customer name
  - Warranty package
  - Price showroom owes Drive Safe
  - Invoice number
  - Payment terms
3. Showroom receives the invoice notification
  4. Admin can view:
    - Invoice paid/unpaid status
    - Invoice history
    - Total sales per showroom

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### 3.4 Document Management Flow

Each customer profile supports document uploads by:

- Showroom (during first 6 months)
- Drive Safe (any time)
- Customer (optional self-upload)

#### Rules:

- Showroom can upload/edit ONLY within the first 6 months
- Drive Safe can upload/edit ANY time
- Customer can always view documents
- After 6 months, showroom becomes “read-only”

All documents stored under:

**Customer → Documents Section**

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### 3.5 6-Month Control Transfer Flow

#### Timeline:

Month 0 → Warranty purchase

Month 0–6 → Showroom manages customer

After Month 6 → Drive Safe takes control

**How system handles this automatically:**

1. System tracks warranty start date
  2. A CRON job checks for customers who reach 6 months
  3. At 6 months:
    - Showroom permissions switch from “Edit + Upload” to “Read Only”
    - Drive Safe becomes the primary handler
    - Customer still retains access with no change
  4. Customer sees details updated by Drive Safe going forward
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### **3.6 Customer Login Flow**

1. Customer receives welcome email with login credentials
  2. Logs into Customer Portal
  3. Customer dashboard includes:
    - Warranty Package
    - Start & End Date
    - Mileage Limit
    - Documents
    - Warranty Terms
    - Support / Enquiry form
  4. After 6 months:
    - The customer sees Drive Safe as the handler
    - Showroom support option removed
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### **3.7 Drive Safe Admin Panel – Everything They Can See**

**Dashboard Includes:**

- Total number of showrooms
- Total warranty sales
- Earnings reports
- Pending invoices
- Recently added customers

**For Each Showroom, Admin Can View:**

- Showroom's branding
- Showroom's pricing structure
- Number of warranty sales
- Total amount showroom owes
- Customer list with full details
- Documents uploaded by showroom
- System-generated invoices

**For Each Customer, Admin Can View:**

- Warranty details
- Uploaded documents
- Showroom details
- Repair history (future feature)
- Notes / Internal comments

Admin can also upload documents for customers.

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**4. SYSTEM MODULES (DEVELOPER-BRIEF)****4.1 Authentication Module**

- Three user roles with different dashboards
- Password reset

- Email verification
- Role-based routing

#### **4.2 Showroom Management Module**

- CRUD for showrooms
- Custom pricing module
- Branding upload
- Permissions management

#### **4.3 Warranty Sales Module**

- Create customer
- Link customer to showroom
- Auto-generate invoice
- Document uploader
- Warranty timeline tracker

#### **4.4 Customer Portal Module**

- Warranty view
- Document viewer
- Enquiry/Support form
- 6-month logic

#### **4.5 Document Management & Storage**

- Secure upload system
- Permissions by user type
- Versioning (optional)

#### **4.6 Accounting & Invoice Module**

- Auto-generate invoices
- Download invoice PDFs
- Dashboard totals



- Payment tracking
- Export reports

#### **4.7 Scheduler / CRON Jobs**

- 6-month handover automation
  - Invoice reminders
  - Data consistency checks
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### **5. BRANDING CONTROL**

Each showroom portal must display:

- Their logo (uploaded by Drive Safe admin)
- Their name (text)
- Their colors (optional feature)

Drive Safe Admin can update these at any time.