

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.

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**

3.2 Showroom Logs In & Creates Warranty Sale

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

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.

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.