



Agent Customer Market Analyzer (ACMA)

Name: Agent Customer Market Analyzer

Domain: P&C (Property and Casualty) Insurance

Module: Super Admin

ACMA:

ACMA Stands for Agent and Customer Property Market Analyzer designed and developed for the property and casualty insurance domain needs.

Super Admin

Acma product have the 3 applications:

- ✓ Acma Center
- ✓ Policy Center
- ✓ Billing Center

Step-1: The tenant super admin details, like First Name, LastName, Email, Mobile Number will be configured in properties files I.e. Config-Store

Step-2: Acma product when deploying, the tenant super admin details First Name, LastName, Email, Mobile Number and Company Logo will be loaded from the configuration I.e. properties files and silently create the user in the acma iam I.e. <https://iam.acma.properties.com> I.e. KeyCloak

Step-3: Once Super Admin will register, a verification email will be triggered to super admin

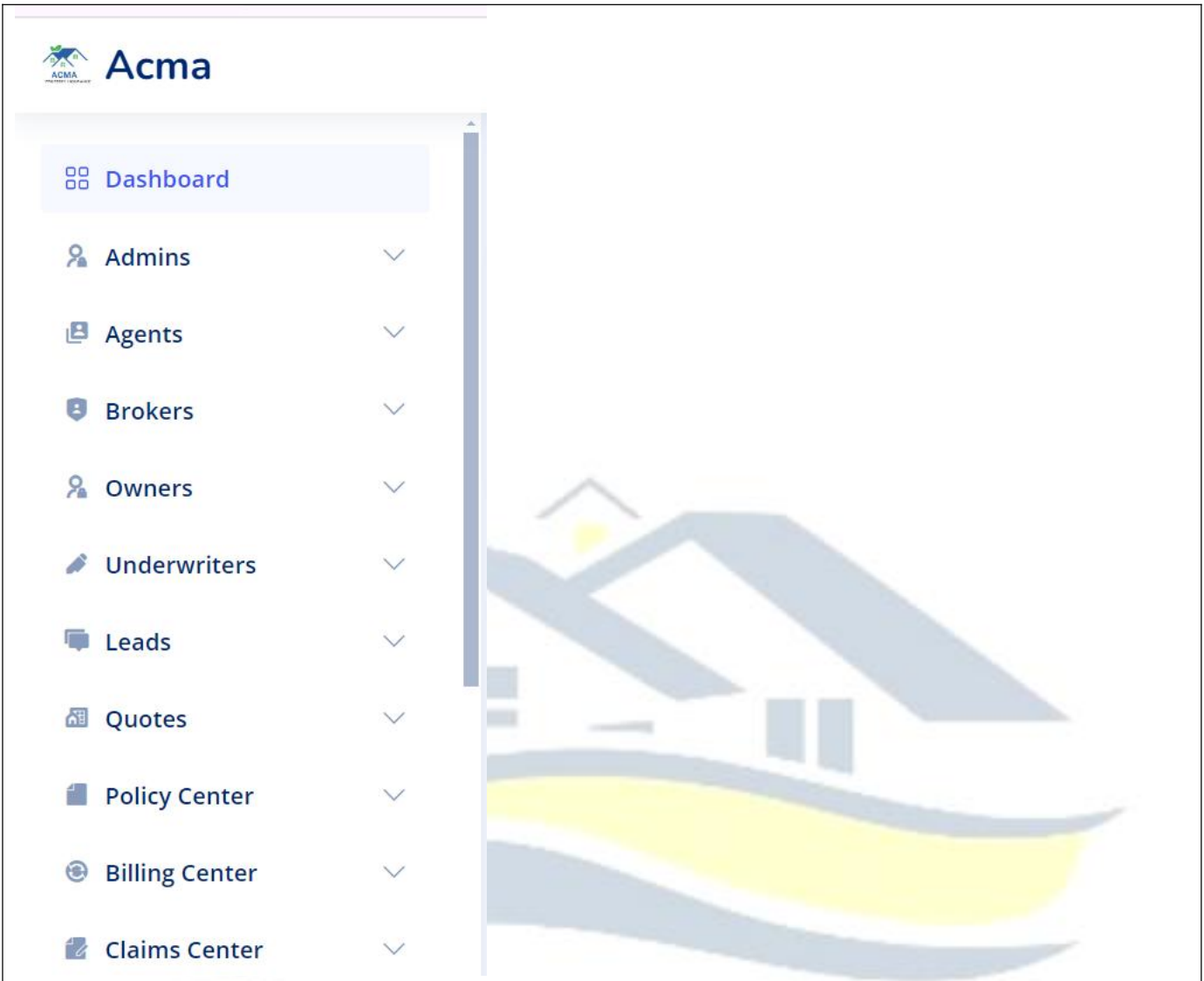
Step-4: Once SuperAdmin clicks on the verify email link, then user will be activated with the super admin privileges and redirected back to reset password page.

Step-5: In Reset Password page, password and confirm password will be asked. Once entered then the step up authentication will be performed along with the MFA.

Once MFA Confirmed, then the password for the super admin will be changed, an email notification will be sent by notifying the Password changed successfully and also another welcome email will be sent by confirming the onboarding process completed and redirect the user to acma home page I.e. <https://acma.properties.com>

Step-6: Once super admin Login, the super admin dashboard will be open and have the following functionalities can be managed by the super admin.

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Admins Onboarding

Step-1: Super Admin will register an admin with the Basic Details, Field Of Experience details, Documents.

Step-2: upon the Admin created in Keycloak, a verification email will be triggered to Admin registered email ID.

Step-3: Once Admin clicks on the verify email link, then Admin will be activated with the AcmaAdmin privileges and redirected back to reset password page.

Step-4: In Reset Password page, password and confirm password will be asked. Once entered, then the step up authentication will be performed along with the MFA like OTP/Push Notification.

Once MFA Confirmed, then the password for the admin will be changed, and an email notification will be sent by notifying the Password changed successfully and also another welcome email will be sent by confirming the onboarding process completed and redirect the Admin to acma home page I.e.

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<https://acma.properties.com>

Step-5: Once admin Login, the admin dashboard will be open and have the following functionalities can managed by the Admin.



Acma

Dashboard

Agents

Brokers

Owners

Underwriters

Leads

Quotes

Policy Center

Billing Center

Claims Center

Agents Onboarding

SuperAdmins and Admins can onboard the Agents.

Agents will walk-in to the insurer organization. Admins will have a quick discussion with the agents. Verify the agents license and all other documents and will onboard the Agents.

Admin will click on Register Agent Link, then a wizard form should open with the Basic Details, License Details, Documents tabs.

Basic Details: First Name, Last Name, Email, Mobile and Photo and Agent Type.

- ✓ Photo will be captured and uploaded on the premises.
- ✓ Agent Type can be Acma_External_Agents, Acma_Internal_Agents

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License Details: Lice Number, Issued At, Valid through, Issued By, License Copy upload Button.

Documents: Documents of Current Residence, Previous Exp, SSN, State ID/DL.

Compensasion: This tab should be enable only if the agent type is Acma_Internal_Agents and contains the cost to the company details.

Commisions: This tab should be enabled only if the agent type is Acma_External_Agents.This tab contains the Commision per sale details. Rate of commition etc.

Once after filling all these details, then the basic details should go and save in keycloak.

Step-1: upon the Agent created in Keycloak, a verification email will be triggered to Agents registered email ID.

Step-2: Once Clicks clicks on the verify email link, then Agent will be activated with the AcmaAgent privileges and redirected back to reset password page.

Step-3: In Reset Password page, password and confirm password will be asked. Once entered, then the MFA like OTP/Push Notification.

Once MFA Confirmed, then the password for the Agent will be changed, and an email notification will be sent by notifying the Password changed successfully and also another wleome email will be sent by confirming the onboarding process completed and redirect the Agent to acma home page I.e. <https://acma.properties.com>

Step-5: Once Agent Login, the Agent dashboard will be open and have the following functionalities can managed by the Agent.

Brokers Onboarding

SuperAdmins and Admins can onboard the Brokers.

Brokers will walk-in to the insurer organization. Admins will have a quick discussion with the brokers. Verify the broker license issued by the Agents/Agency and all other documents and will onboard the Brokers.

Admin will click on Register Broker Link, then a wizard form should open with the Basic Details, License Details, Documents and Compensation tabs.

Basic Details: First Name, Last Name, Email, Mobile and Photo and Agent Type.

- ✓ Photo will be captured and uploaded on the premises.
- ✓ Agent Type can be Acma_External_Agents, Acma_Internal_Agents

License Details: Lice Number, Issued At, Valid through, Issued By, License Copy upload Button.

Documents: Documents of Current Residence, Previous Exp, SSN, State ID/DL.

Commisions: This tab contains the Commision per sale details. Rate of commition etc.

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Note:

All the Soft Copy of the Project Implementation Guides, Materials and class recordings will be uploaded to [TechhubVault](#) app.

