



# SOFTWARE REQUIREMENT SPECIFICATION

---

Insurance Portal

v1.0 01<sup>st</sup> February, 2024

## **SILEO TECHNOLOGIES PRIVATE LIMITED**

4th Floor Salarpuria Towers-01, Hosur Road,  
Koramangala, Bengaluru-560095 KA

Email: [info@thesileo.com](mailto:info@thesileo.com) Web: <http://www.thesileo.com>

# Table Of Content

## 1. INTRODUCTION

### 1.1 PURPOSE

### 1.2 SCOPE

## 2. SYSTEM OVERVIEW

### 2.1 SUPER ADMIN PANEL

### 2.2 CRM PANEL

### 2.3 CUSTOMER-FACING WEBSITE

## 3. FUNCTIONAL REQUIREMENTS

### 3.1 SUPER ADMIN PANEL

### 3.2 CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

### 3.3 CUSTOMER-FACING WEBSITE

## 4. NON - FUNCTIONAL REQUIREMENTS

### 4.1 PERFORMANCE

### 4.2 SECURITY

### 4.3 USABILITY

### 4.4 RELIABILITY

### 4.5 SCALABILITY

## 5. USE CASES

## 6. CONCLUSION

## 1. INTRODUCTION

The Insurance Portal is a comprehensive software solution designed to revolutionize the insurance industry by integrating a Super Admin panel, a Customer Relationship Management (CRM) panel, and a customer-facing website. With a focus on efficiency and user experience, the portal aims to simplify the management of multiple insurance companies and enhance customer interactions. The Super Admin panel provides centralized control, while the CRM panel facilitates individual company management. The customer-facing website offers a user-friendly platform for customers to explore and purchase various insurance policies. This Software Requirement Specification (SRS) document outlines the detailed requirements for the development of this innovative Insurance Portal.

### 1.1 PURPOSE

The purpose of this Software Requirement Specification (SRS) is to provide a detailed description of the requirements for the development of an advanced Insurance Portal. This platform aims to offer a comprehensive solution for the insurance industry by incorporating a Super Admin panel, a Customer Relationship Management (CRM) panel, and an intuitive customer-facing website. The primary goal is to streamline the management of multiple insurance companies, enhance customer relationship processes, and provide an efficient platform for customers to purchase diverse insurance policies.

## a. Objectives

The key objectives of the Insurance Portal are as follows:

- ❖ **Diversified Insurance Services:** Provide a range of insurance services covering Term Life, Health, Car, and Bike, ensuring a comprehensive solution for various customer needs.
- ❖ **User-Friendly Interface:** Develop an intuitive and easy-to-navigate frontend that enables customers to effortlessly explore, understand, and purchase insurance services.
- ❖ **Transparent Information:** Insure clarity in presenting insurance terms, conditions, and coverage details, fostering customer understanding and confidence.
- ❖ **Instant Quotes:** Facilitate quick and accurate generation of insurance quotes from top insurers, providing users with valuable and real-time information.
- ❖ **Customer Support Excellence:** Establish robust customer support mechanisms, including live chat features, to assist users promptly and effectively.
- ❖ **CRM Panel Integration:** Implement a Customer Relationship Management System (CRM) panel to manage leads efficiently, enhancing internal processes and customer relationship management.
- ❖ **Super Admin:** Empower Super Admins with the tools to oversee and control company profiles, user roles, policy offerings, and analytics in real-time.

## b. Benefits

The Insurance Portal aims to deliver the following benefits to its users:

- ❖ **Comprehensive Coverage:** Access to a diverse array of insurance services under one platform.
- ❖ **Financial Security:** Assurance of financial protection through chosen insurance products.
- ❖ **User Empowerment:** Simplified information to empower users in making informed decisions.
- ❖ **Effortless Transactions:** Seamless and secure online transactions for policy purchases.
- ❖ **Responsive Support:** Timely and effective customer support during all stages of interaction.
- ❖ **Risk Mitigation:** Quick and stress-free policy processing to mitigate the impact of unexpected events.
- ❖ **CRM Efficiency:** Streamlined lead management and customer interaction tracking through the CRM panel.
- ❖ **Super Admin:** Efficiently manage multiple insurance companies within the portal.

In essence, this document aims to define the specific requirements that will guide the development team in creating a robust and user-centric Insurance Portal, addressing the unique needs of Super Admins, Company Admins, and end-users.

## 1.2 SCOPE

The scope of the Insurance portal encompasses the development of a robust and comprehensive platform that seamlessly integrates various components to deliver a holistic insurance experience. The key components include user interfaces for customers, a Customer Relationship Management (CRM) panel, and a secure backend system. The Insurance Portal will encompass three main components, each serving a distinct purpose:

### 1.2.1 Super Admin Panel

- The Super Admin panel will serve as the central hub for overseeing and managing multiple insurance companies.
- This includes adding and managing companies, controlling user access and roles, and having an overview of policies and analytics for all affiliated companies.

### 1.2.2 Customer Relationship Management (CRM) Panel

- The CRM panel is designed for individual insurance companies to efficiently manage customer-related data, policy features, and other functionalities.
- Company administrators will be able to handle customer interactions, policy details, and their processing in a streamlined and effective manner.

### 1.2.3 Customer-Facing Website

- The customer-facing website will be the front-end interface for end-users to explore, select, and purchase various insurance policies.

- It will offer a user-friendly experience with features like instant quotes, policy management, educational resources, and customer support.

This detailed scope defines the specific functionalities and features that each component will encompass, setting the groundwork for a comprehensive and integrated Insurance website.

In addition to insurance services, the platform offers a Customer Relationship Management (CRM) panel for managing various aspects of the business, including Lead Management, Customer Management, Policy Management, Employee Management, Documents, and other related functionalities.

## 2. SYSTEM OVERVIEW

The system overview provides an in-depth understanding of the three integral components of the Insurance Portal: The Super Admin Panel, CRM Panels, and The Customer-Facing Website.

### 2.1 SUPER ADMIN PANEL

#### 2.1.1 Overview:

The Super Admin Panel serves as the nerve centre, offering a unified interface for overseeing and managing the diverse facets of multiple insurance companies.

#### 2.1.2 Functionality:

##### a. Company Management:

###### ❖ Details:

- The Super Admin can seamlessly add, modify, or remove insurance companies within the portal.
- Each company's profile includes comprehensive information for effective management.

##### b. User Management:

###### ❖ Details:

- Super Admins have the authority to manage user roles, ensuring secure access.
- This includes Super Admins, Company Admins, and staff members. The system facilitates password resets for enhanced security.



#### c. Policy Management:

##### ❖ Details:

- A comprehensive overview of policies offered by each company is accessible in real-time.
- The Super Admin can add, edit, or remove policies dynamically to keep offerings relevant.

#### d. Dashboard and Analytics:

##### ❖ Details:

- A centralized dashboard provides real-time analytics and statistics, offering insights into policy sales, customer engagement, and other critical metrics for informed decision-making.

## 2.2 CRM PANELS

### 2.2.1 Overview

- The CRM Panels are tailored platforms for individual insurance companies, designed to enhance customer relationship management and internal processes.

### 2.2.2 Detailed Functionality

#### a. Customer Data Management:

##### ❖ Details:

- Company Admins can efficiently manage customer data, including adding, editing, or removing customer information.

- The system ensures compliance with data protection regulations for secure data handling.
- b. Policy Features:
- ❖ Details:
  - Company Admins can define and manage policy details, coverage, and premiums.
  - Policies are categorized and easily searchable for efficient policy management.

## 2.3 CUSTOMER-FACING WEBSITE

### 2.3.1 Overview

- The Customer-Facing Website is the public interface that provides end-users with a user-friendly platform to explore, select, and purchase various insurance policies.

### 2.3.2 Detailed Functionality

a. User Registration and Login:

- ❖ Details:
- The website facilitates a secure and user-friendly registration process. It includes a robust login functionality with options for password recovery.

b. Policy Purchase:

- ❖ Details:

- Customers can seamlessly explore and purchase various insurance policies through an intuitive interface. The process guides users through policy selection, customization, and purchase.
- c. Instant Quotes:
- ❖ Details:
  - The website integrates with top insurers to fetch real-time quotes, providing customers with quick and transparent information on influencing factors.
- d. Policy Management:
- ❖ Details:
  - Customers have access to a user dashboard for managing their policies. It includes details on policy coverage, renewal information, and real-time updates on claim status.

In summary, the system overview highlights the intricate functionalities of the Super Admin Panel, CRM Panels, and the Customer-Facing Website. Each component is intricately designed to fulfil its unique role, contributing to the overarching goal of creating a comprehensive and user-centric Insurance Portal.

### 3. FUNCTIONAL REQUIREMENTS

The functional requirements outline the specific features and capabilities that each component of the Insurance Portal must possess to meet its objectives effectively.

#### 3.1 SUPER ADMIN

##### 3.1.1 Company Management

###### a. Add Company:

- The Super Admin should be able to add new insurance companies to the portal.
- Relevant details such as company name, contact information, and profile should be captured.

###### b. Edit Company:

- The Super Admin should have the ability to modify existing company information.
- Changes may include updates to company details, contact information, or any other pertinent data.

###### c. Deactivate/Remove Company:

- The Super Admin should be able to deactivate or remove a company from the portal.
- Deactivation might be necessary for companies that are temporarily inactive, and removal for those no longer affiliated.

##### 3.1.2 User Management

a. Add/Edit/Remove Users:

- The Super Admin should be able to add, edit, or remove Super Admins, Company Admins, and staff members.
- This includes capturing relevant user details such as name, contact information, and assigning appropriate roles.

b. Password Reset:

- The Super Admin should have the capability to reset passwords for any user.
- This ensures that security is maintained, and users can regain access to the portal.

### 3.1.3 Policy Management

a. Policy Overview:

- The Super Admin should have access to a comprehensive overview of policies offered by each company.
- This includes details on policy types, coverage, premiums, and any associated terms.

b. Add/Edit/Remove Policies:

- The Super Admin should be able to add, edit, or remove policies dynamically.
- Changes should be reflected in real-time on the portal for accurate policy management.

### 3.1.4 Dashboard and Analytics

a. Real-time Analytics:

- The Super Admin should have access to a dynamic dashboard providing real-time analytics.
- Metrics may include policy sales, customer engagement, and other relevant statistics for informed decision-making.

### 3.2 CUSTOMER RELATIONSHIP MANAGEMENT (CRM):

#### 3.2.1 Customer Data Management:

##### a. Add/Edit/Remove Customers:

- Company Admins should be able to manage customer information securely.
- This includes capturing and modifying customer details, ensuring compliance with data protection regulations.

#### 3.2.2 Policy Features

##### a. Define Policy Details:

- Company Admins should have the capability to define and manage policy details, coverage, and premiums.
- The system should support categorization and easy searchability of policies.

### 3.3 CUSTOMER-FACING

#### 3.3.1 User Registration and Login

##### a. Secure Registration:

- The website should offer a secure and user-friendly registration process for customers.

- Relevant customer details should be captured, and the registration process should comply with security standards.
- b. Login Functionality:
- The website should provide a robust login functionality, ensuring secure access for registered users.
  - Options for password recovery and account security features should be implemented.

### 3.3.2 Policy Purchase

a. Policy Selection:

- The website should guide customers through an intuitive process to explore and select various insurance policies.
- Customization options and a seamless purchasing experience should be ensured.

### 3.3.3 Instant Quotes

a. Real-time Quotes:

- The website should integrate with top insurers to fetch real-time quotes.
- Transparent communication about influencing factors should be presented to customers.

### 3.3.4 Policy Management

a. Customer Dashboard:

- Customers should have access to a user-friendly dashboard for managing their policies.

- Details on policy coverage, renewal information, and real-time updates on claim status should be available.

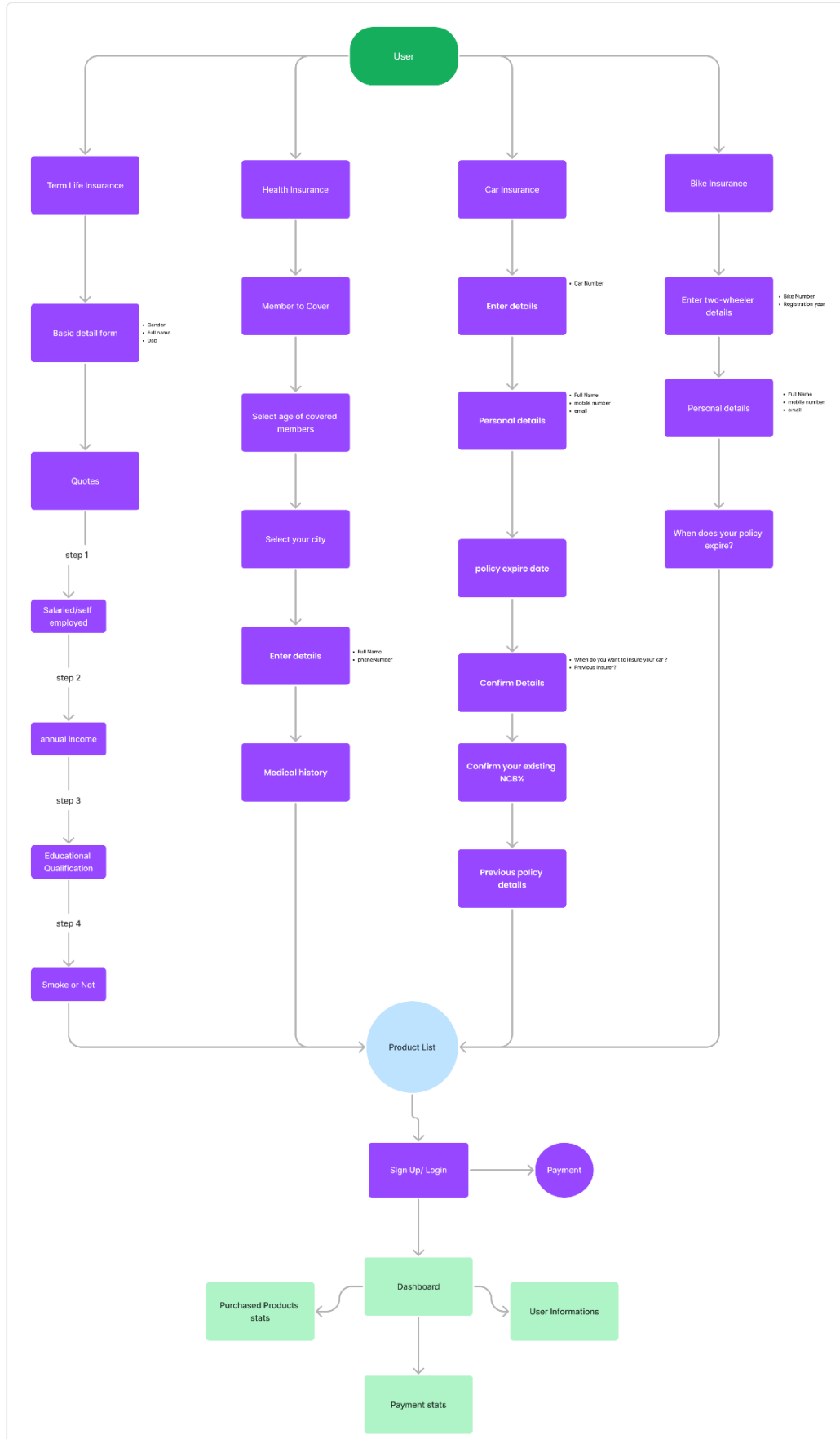
### 3.3.5 Customer Support

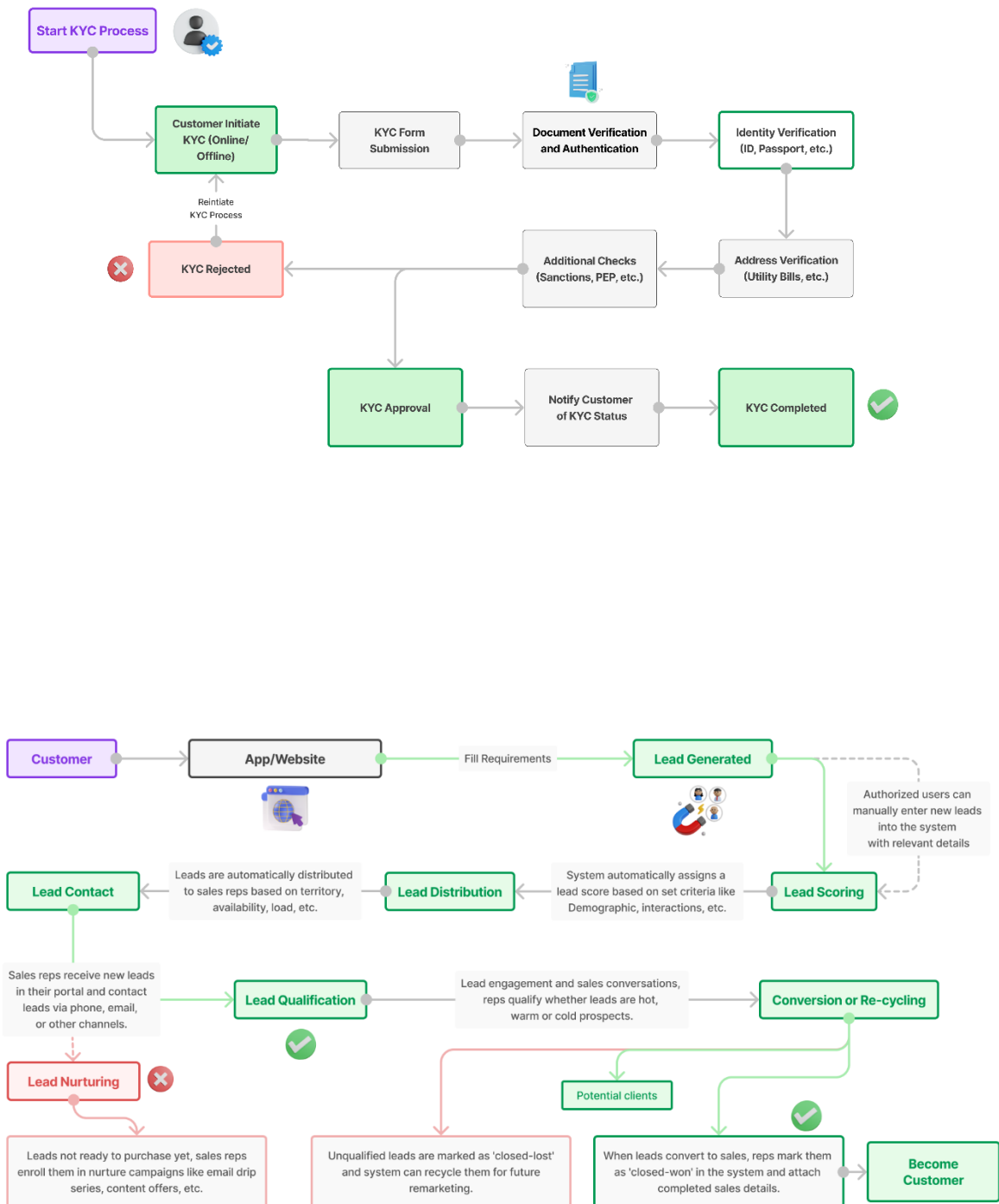
#### a. Integrated Support:

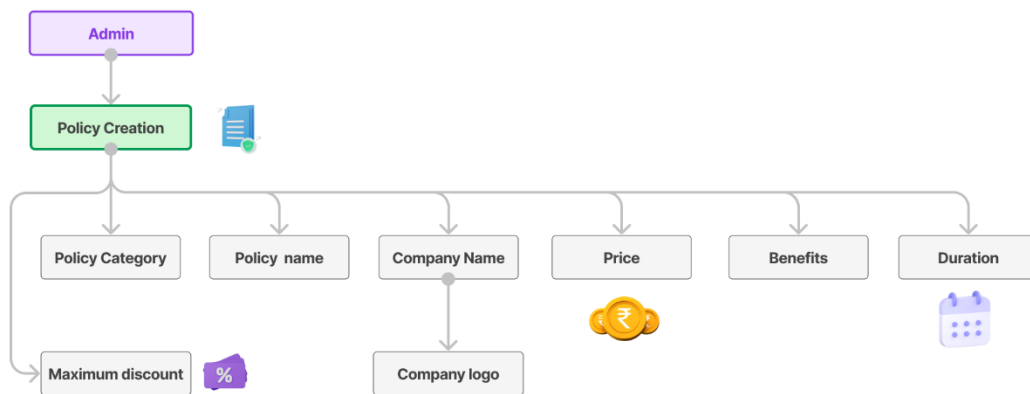
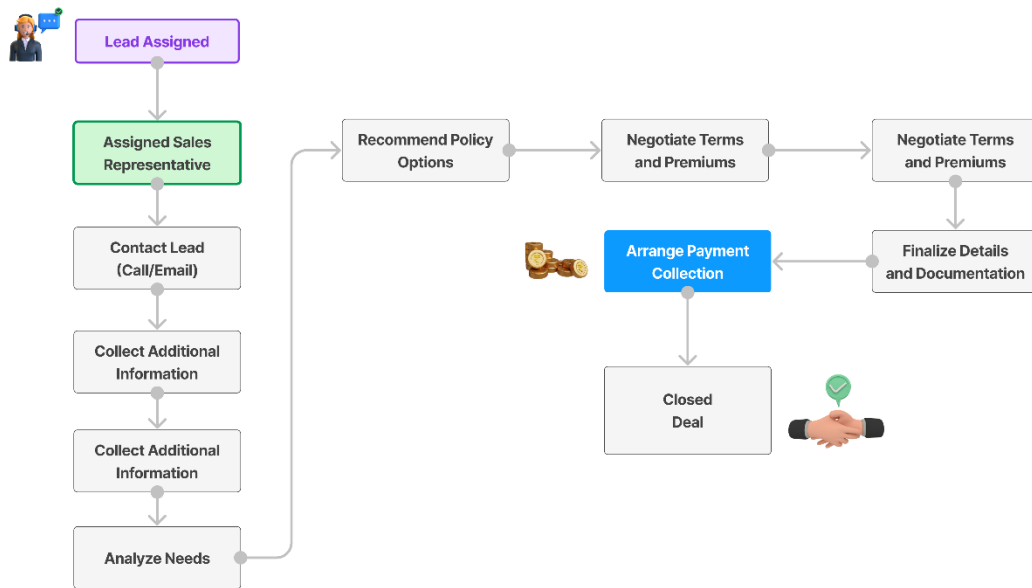
- The website should feature integrated support options such as chat, email, and hotline for real-time assistance.
- Contact information for customer support should be prominently displayed.

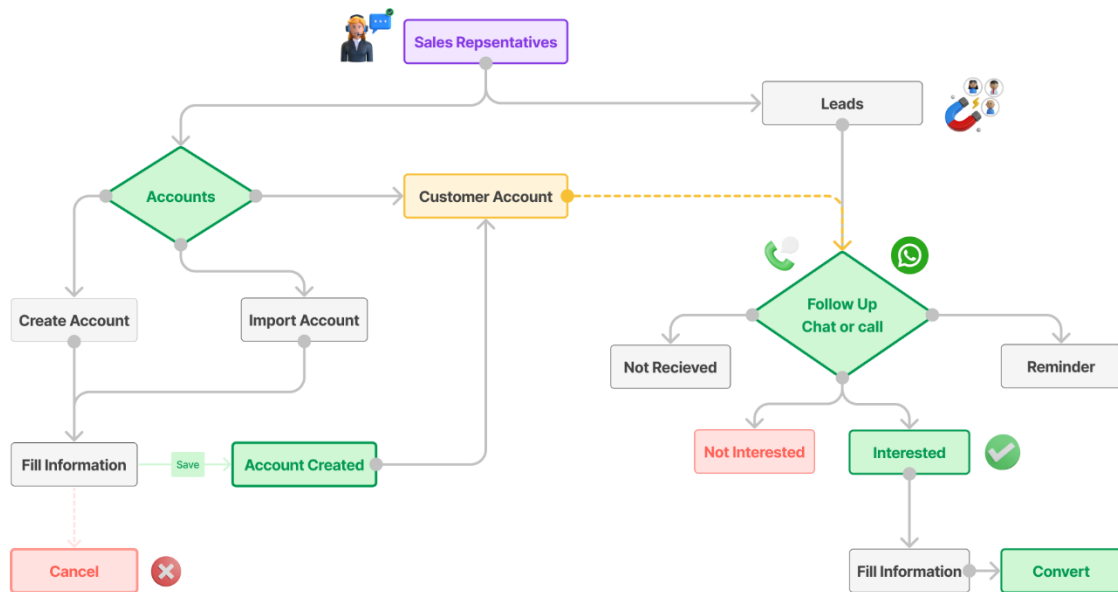


## Section 1









In summary, the functional requirements outlined for each component of the Insurance Portal ensure a robust and user-centric system that caters to the specific needs of Super Admins, Company Admins, and end-users. The defined features aim to streamline insurance-related activities and enhance overall user experience.

These detailed functional requirements within the CRM Panel section ensure that the system supports effective lead management, maintains a comprehensive customer database, facilitates policy management, enables efficient employee management, tracks and manages insurance functionalities, and provides robust document management capabilities.

## 4 NON-FUNCTIONAL REQUIREMENTS

### 4.1 PERFORMANCE

#### a. High Volume Concurrent Users

##### ❖ Description:

- The system should be capable of handling a high volume of concurrent users without experiencing performance degradation.
- This involves optimizing backend processes, database queries, and front-end rendering to ensure responsiveness and stability, even during peak usage periods.

##### ❖ Response Time:

- Set specific response time targets for critical functions such as policy purchase, and policy management.
- Implement efficient coding practices, optimize database queries, and utilize caching mechanisms to minimize response times.
- Regularly monitor and analyse response times, making adjustments as needed to meet established benchmarks.

### 4.2 SECURITY

#### a. Robust Security Measures

##### ❖ Description:

- The system must implement robust security measures to protect user data.

- This includes employing industry-standard encryption protocols for data transmission, encrypting sensitive user information stored in databases, and implementing secure authentication mechanisms, such as multi-factor authentication.
- Employ role-based access control (RBAC) to ensure that each user has appropriate access rights based on their role within the system.
- ❖ Data Protection Laws and Regulation:
  - Implement robust data encryption for sensitive customer and policy information.
  - Regularly conduct security audits and vulnerability assessments to identify and address potential security risks.
  - Adhere to regional and international data protection laws, such as GDPR, HIPAA, or other relevant regulations

#### 4.3 SCALABILITY

##### a. Future Growth

- ❖ Seamless Addition of Companies and Customers:
  - The system should be designed to be scalable, allowing it to accommodate future growth in terms of users, policies, and data.
  - This involves implementing scalable architecture, utilizing cloud-based solutions, and optimizing database structures to handle increased loads.
- ❖ Scalable Architecture:
  - Scalability is essential to accommodate an expanding user base, increased policy volume, and growing data requirements.

- It ensures that the system remains responsive and performs well as the business expands.

#### 4.4 USABILITY

##### a. Intuitive User Interface

###### ❖ Description:

- The user interface should be intuitive, providing a positive and seamless experience for all users Super Admin, customers and employees.
- This involves clear navigation, user-friendly layouts, and well-designed interactive elements that guide users through various functionalities.
- Gather user feedback through usability testing to make continuous improvements to the interface.

###### ❖ User Documentation and Tooltips:

- Usability is critical for user satisfaction and efficiency.
- Develop comprehensive user documentation, including user guides and FAQs, to assist users in understanding the system's functionalities.
- An intuitive interface reduces the learning curve, enhances user engagement, and contributes to a positive overall experience.

#### 4.5 RELIABILITY

##### a. High Availability

###### ❖ Description:

- The system should ensure high availability to prevent disruptions in service.

- This involves implementing redundant systems, load balancing, and effective error handling to minimize downtime.
- ❖ Automated backups:
  - Reliability is crucial for maintaining continuous service availability.
  - High availability ensures that users can access the system whenever needed, contributing to customer satisfaction and trust.
  - Store backups in secure and easily recoverable locations, ensuring data integrity and availability in the event of data loss or system failure.

These detailed non-functional requirements within the Performance, Security, Scalability, Usability, and Reliability categories aim to establish a robust and dependable system that not only performs well under various conditions but also prioritizes the security and positive user experience for all stakeholders.



## 5 CONCLUSION

This Software Requirement Specification (SRS) document serves as a comprehensive guide outlining the essential requirements for the development of the Insurance Portal. By detailing both functional and non-functional aspects, this document provides a solid foundation for the development team to create a robust, secure, and user-friendly insurance portal with an integrated CRM panel.

The specifications outlined in this document cover a wide range of functionalities, including support for various insurance types, instant quote generation, online policy purchase, detailed policy information dissemination, and efficient processing. Additionally, the CRM panel functionalities, such as lead and customer management, policy administration, employee management, and document management, are detailed to ensure a seamless end-to-end experience for both customers and employees.

The chosen technology stack, combining Java and Postgres SQL for the insurance services backend, Angular for the CRM panel backend, and the React.js & Next.js stack for the website frontend, reflects a strategic approach to development, leveraging the strengths of each technology to create a robust and scalable system.

Non-functional requirements addressing performance, security, scalability, usability, and reliability further emphasize the commitment to delivering a high-quality, dependable, and user-centric solution.

This SRS document is intended to guide the development team, ensuring a clear understanding of the project goals and requirements. It will serve as a reference throughout the development lifecycle, facilitating effective communication between stakeholders, and ultimately contributing to the successful delivery of the Insurance website - a platform that not only provides financial safety through insurance services but also simplifies complex terms, offers stress-free process, and stands by its users in the toughest of times.