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# Preamble

This document outlines the requirements for a web application designed for Taylor Insurance, a small, customer-driven company transitioning from a paper-based system to a digital platform. The primary objective is to create an accessible and user-friendly web app that facilitates account management, data handling, and claims processing for its users. This project will help Taylor Insurance modernize operations, enhance customer service, and support future growth.

# Company Overview

* Customer-Driven Approach: Taylor Insurance prioritizes customer satisfaction.
* Technology Status: Currently behind in technology, relying on a paper-based system.
* Business Focus: Small company selling insurance policies to existing users.
* Josh Taylor - Project Champion:
  + Acts as the primary point of contact.
  + Provides insurance calculation details and oversees project success.

# Project Goals

* Transition from a paper-based system to an online platform.
* Provide a web application that allows users to:
  + Create accounts for record-keeping.
  + Access public-facing information.
  + Log in to manage data.
  + Process claims online (payments remain offline).
* Ensure the POC application is deployed by the end of February.

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# User Requirements

1. Account Creation:
   * Users must be able to create and maintain accounts to store personal and policy data.
2. Data Management:
   * Users log in to handle and update their personal and insurance data.
3. Claims Processing:
   * Allow users to process claims online with offline payment handling.
4. Contact Options:
   * Provide a contact section for reaching service representatives, including:
     + Phone number.
     + Comment submission feature.
5. Mobile and Desktop Compatibility:
   * Primary use expected on mobile devices.
   * Desktop interface should also be user-friendly.
6. User Guidance:
   * Include a simple user guide to aid in platform navigation.
7. Automatic Renewal Process:
   * Letters will be sent out for renewal notifications.
   * Email notifications are not required.
8. Tracking:
   * Users should have a history of actions tracked.
9. Accessibility:
   * Meet a minimum standard for accessibility.

# Admin Requirements

1. Admin User:
   * One admin user to:
     + View and manipulate data.
     + Access reports in the backend.
   * No differentiation in admin logins required.
2. Service Representative Tools:
   * Service representatives must use tools to assist customers during calls.

# Technical Requirements

1. Database:
   * Store user information:
     + Name
     + Age
     + Date of Birth
     + Driver’s License Number
     + Relationship Status
     + Geographic Data (simple addresses)
2. User Base:
   * Scale to support 15,000–20,000 users.
3. Localization:
   * English-only at launch.
   * Expandable to French for future operations in Quebec.
4. Design and Branding:
   * Design is at the team's discretion.
   * Style is less important than functionality and usability.
5. Insurance Calculations:
   * Josh will provide the necessary formulae or calculations.
6. Reports:
   * No site-level reporting required.
   * Reports may be accessible on the backend.
7. Document Uploads:
   * Not required.
   * Users must confirm data as true and honest.
8. External Dependencies:
   * No external dependencies anticipated.

# Deliverables

1. Web Application:
   * App deployed on the web by the end of February as a POC.
2. User Guide:
   * Simple guide for end users.
3. Documentation:
   * Technical and maintenance documentation for internal use.