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**USER MANUAL**

**FOR EASY INSURE**

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SYSETEM OVERVIEW

Overview

ABC Solutions has now successfully implemented a website for Easy Insure. With the customer successfully choosing a life insurance policy, a report is generated to all locations of the Easy Insure company. With the administrators having their own portal within the website, they’re able to see and confirm (or deny) all customers. Reports showcase the life insurance type and the monthly premium. The regional manager should focus is the expansion to other countries, which insurance type is the top seller, and continued training for all employees in all areas within the company..

The User Manual contains all essential information for the user to make full use of the Easy Insure Website. This manual includes a description of the system login and requirements, screen functionality, table descriptions, and background information.

SYSTEM OVERVIEW

User Manual Contents

1. **Detailed File Descriptions:** This section includes a brief summary of the files that will be used to run the website.
2. **Detailed Web-Page Layouts:** Each Web-Page has been screen-shot and recorded in the User Manual. This acts as a visual aid for the Narrative Description and step-by-step instructions for each web-page and function.
3. **Narrative Description:** Each Web-Page has a Narrative Description that explains the layout, functionality, and order of operations.
4. **Step-By-Step Instructions:** Each Web-Page has Step-By-Step Instructions available so that Admin’s and Visitors to the website can learn how to properly traverse the website.
5. **Table Descriptions:** All logic inside of the php tables are documented.
6. **Background Information**: This section documents the work completed.

SYSTEM OVERVIEW

Detailed File Descriptions

A list of the files for Easy Insure’s Website

**Description File**

**I. Home Page** easy\_insure\_home.php

**II. Active Directory**

* **Generate Order Report** easy\_insure\_wait\_list.php
* **Add Customer** easy\_insure\_add\_customer.php
* **Remove Customer** easy\_insure\_remove\_customer.php
* **Return User to Homepage** easy\_insure\_home.php

**III. Order Details**

* **Generate Summary at All Locations** easy\_insure\_report.php
* **Generate Order Confirmation** easy\_insure\_order\_confirmed.php
* **Return User to Homepage** easy\_insure\_home.php

**IV. Error Page** easy\_insure\_database\_error.php error.php

 SYSTEM REQUIREMENTS AND LOGIN

**SYSTEM REQUIREMENTS**

**Operating System**: Windows 7 or higher; Sierra (10.12) or Higher

**Processor:** Core i3 or equivalent and higher

**Memory:** 4gb

**Network**: Broadband Internet Connection

**SYSTEN LOGIN**

On the Homepage, the system administrator can select Admin Login and can then type in the word ‘Admin’ to gain access to the website’s Admin Directory. This is found on the bottom right of the header on the home page.

*Reword the highlight to explain how Easy Insure employees, administration, and users*

Graphical user interface, application

Description automatically generated

*Administration Directory Login*

*User name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Password: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

DETAILED SCREEN FUNCTIONALITY

HOMEPAGE

Graphical user interface, application

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DETAILED SCREEN FUNCTIONALITY

**Narrative Description of Home Page**

As requested, the home page has term, whole, and universal life insurance displayed at the center of the page for easy access and design emphasis. It is positioned in the body to draw attention to the three life insurance options. This information will be called from the easy\_insure\_home.php file. The header of the webpage, you are welcomed by a navigation bar with five options to click: “Home”, “New Customer”, “Customer List”, “Waiting List”, and “Report” and asks the customer to learn about term, whole, and universal life insurance. When a customer selects a particular insurance, he/she will be taken to the ‘Order Details’ page where he/she can begin filling out his/her details.

**Step-by-Step Instructions of Home Page**

**Example:**

1. As you first enter the site look through the deals of the week to see which one you are interested in.

2. Once item of interest is discovered, click on the hypertext link for that product.

3. You will then be taken to the “Order Details” page.

DETAILED SCREEN FUNCTIONALITY

Order Details

A screenshot of a computer

Description automatically generated

DETAILED SCREEN FUNCTIONALITY

Narrative Description of Order Details

The order details page is accessed through the easy\_insure\_customer\_list.php. The order details page is accessed after the client decides which insurance he/she would like to purchase. The client will type in his or her information which includes:, first name, last name, gender, and whether he/she is a smoker or not. The customer’s ID and the monthly premium of the chosen insurance are automated through the easy\_insure\_db\_functions.php file and is shown to the customer before continuing forward with his/her selection.

**Step-by-Step Instructions of Order Details**

1. Click the text box corresponding to “ID (Usually last 4 numbers of the customer’s social security number” to acknowledge you will be listed in Easy Insure’s database.

2, Click the text box corresponding to “First Name” to input first name.

3. Click the text box corresponding to “Last Name” to input last name.

4. Click the text box corresponding to “Gender” to input his/her gender.

5. Click the text box corresponding to “Smoker to input if the customer is a smoker or not.

* The “Value” text box is determined through an algorithm embedded within the php code. It is called when the “smoker text box” has been checked.
* The “Monthly Premium” is calculated with >>>>
* The “Delete text box” is an option for the regional administrator to delete customer for various reasons. Examples: Death, No longer paying monthly premium, etc…

DETAILED SCREEN FUNCTIONALITY

Waiting List

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Narrative Description of Waiting List

The waiting list, that is contained in the file easy\_insure\_wait\_list.php, can be accessed by all locations and all staff. However, the main people that would be using the waiting list would be the front desk. Here the clerk can fill out the following fields: First Name, Last Name, Phone Number, Date, Time, and Email. The date is formatted with mm/dd/yyyy and time is formatted with hours, minutes, and seconds. The waiting list is in ascending order by time. This allows for first in first out.

**Step by Step Description of Waiting List**

Write something

DETAILED SCREEN FUNCTIONALITY

Order Confirmation

Graphical user interface, text, application

Description automatically generated

DETAILED SCREEN FUNCTIONALITY

Narrative Description of Order Confirmation

Help

**Step-by-Step Instructions of Order Confirmation**

Help.

DETAILED SCREEN FUNCTIONALITY

Error Page

Graphical user interface, text, application

Description automatically generated

DETAILED SCREEN FUNCTIONALITY

Narrative Description of Error Page

Help

**Step-by-Step Instructions of Error Page**

Help

DETAILED SCREEN FUNCTIONALITY

Admin – Directory

Graphical user interface, application

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*Administration Directory Login*

*User name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Password: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

DETAILED SCREEN FUNCTIONALITY

Narrative Description of Admin – Directory

Help

**Step-by-Step Instructions of Admin - Director**

Help

DETAILED SCREEN FUNCTIONALITY

Admin - Reports

Graphical user interface, application

Description automatically generated

DETAILED SCREEN FUNCTIONALITY

Narrative Description of Admin - Reports

**Step-by-Step Instructions of Admin - Reports**

DETAILED SCREEN FUNCTIONALITY

Admin – Add Customer

Graphical user interface

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DETAILED SCREEN FUNCTIONALITY

Narrative Description of Admin – Add Product

**Step-by-Step Instructions of Admin – Add Product**

DETAILED SCREEN FUNCTIONALITY

Admin – Remove Customer

A screenshot of a computer

Description automatically generated

DETAILED SCREEN FUNCTIONALITY

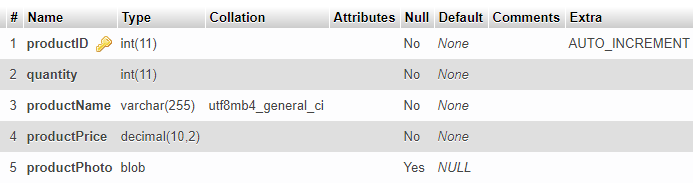
Narrative Description of Admin – Remove Product

**Step-by-Step Instructions of Admin – Remove Product**

TABLE DESCRIPTIONS

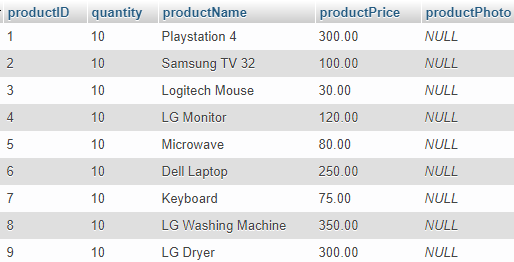
Customer Table – Structure

Example



Customer Table – Contents

Example

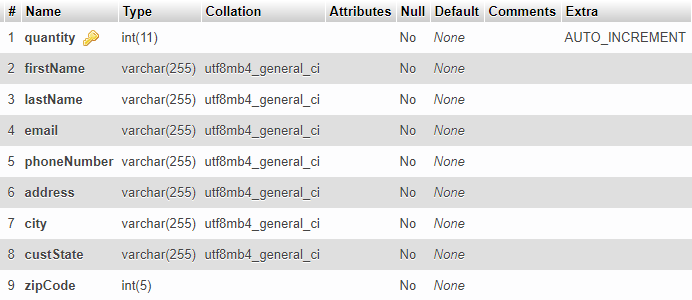


Customer Table – Narrative Description

TABLE DESCRIPTIONS

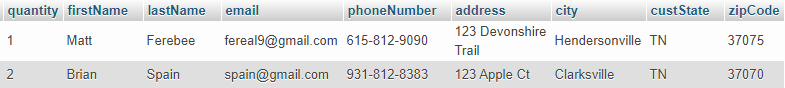
Reports Table – Structure

Example:



Reports Table – Contents

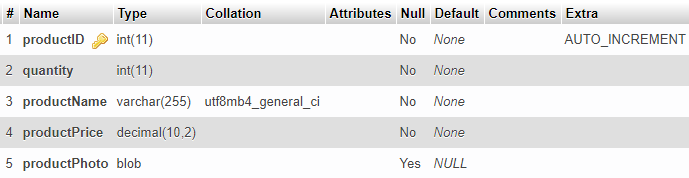
Example:



Reports Table – Narrative

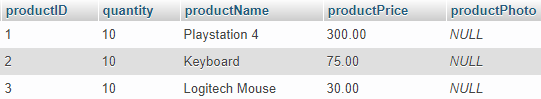
TABLE DESCRIPTIONS

Waiting List Table – Structure

Example:

Waiting List Table – Contents

Example:

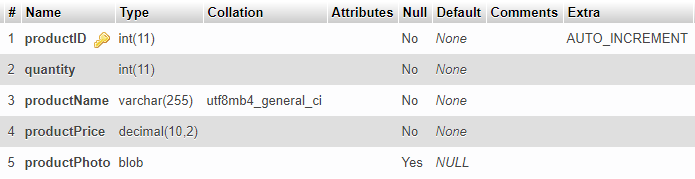


Waiting List Table – Narrative

TABLE DESCRIPTIONS

Orders Table – Structure

Example:



Orders Table – Contents

Example:



Orders Table – Narrative

BACKGROUND INFORMATION

List of Group Meetings Conducted and Individual Work

DATE SUBJECT NOTES

10/30/2021 Individaul Work **Kirk Paitsel**