Client meeting notes

2pm on Wednesdays every week

They fill out the buyer order then they put that information into the web app on the admin side and the user would see the amount of cost that would be added on to get the warranty. The admin would decide what the result is – auto generated?

We have to implement warranty to be auto generated depending on the purchase order and the type of car?

When the user first creates their account and they don’t have any information yet, they create an account on our end. They are signing up on OUR page – not on the main website. They have already completed their loan? They should at least have a car?

Page with their logo – create account or login, with option to reset their password.

On create account – first name, last name, DOB, Email, Phone #, Name of the vehicle that they are applying for (optional) year, make, model. Sometimes they put in a loan but don’t have a car (preapproved?), after that they are registered.

The home page has the bar that says – pending, submitted, etc (progress bar)

Buyer orders are not through our website.

The admin submits a form and the customer can just see what was submitted?

All the user can see is the process for the loan, they can opt for warranty before or after the loan (anytime), a timestamp – if they have the option to purchase the warranty it will open another page with details of the warranty to see if they can qualify for that warranty. If their car is too old or does not meet the criteria they should not be able to see or purchase a warranty. If they are able to they should be able to look through the warranty packages that they have and they can choose the warranty that they want. Once they actually choose – they would be notified (with a timestamp?) (only if not time consuming). Timestamp when they click to see if warranty

On the user homepage – they need a car in order to select a warranty. They can get a quote if its optional, but if they do have a car they can opt for it then. Should be able to tell them the details if their car qualifies for a warranty- and if it does what kind of warranty (only 3 diff packages). Titled warranty or warranty details or warranty packages

They should have a list of cars they are interested in owning, and based on each car they can generate a warranty package.