**Software Requirements Specification**

**Program** **Title**: Customer Relationship Management for Insurance

**Objective**: To manage customers of an insurance company

**Team**: Santam IT Interns (11 members)

**Estimated Time**: 1 Week

**Requirements**

This is a web based CRM application to manage customer information based on insurance requirements of customers. The below use cases outline the requirements of this project.

**Use-Cases**

|  |  |  |
| --- | --- | --- |
| **Number** | **Name** | **Description** |
|  | Accept Customer Details | * Captures the following customer details: Name, Street Address, City, Postal Code, Country, ID Number, Tel Number, Cell Number and Email. * Validate the ID Number and Postal code against a database. |
|  | Insurance Inquiry | * Capture a customer’s insurance requirements like product type (auto, property, liability), Vehicle Reg. Number, model, make, current cost of property or vehicle, period required * Validate the Vehicle Reg. Number |
|  | Accept Coverage Requirements | Capture coverage requirements like coverage required, possible limit of coverage and location. |
|  | Search customer | Search customer by name, location or product |
|  | Reports | * List of customers by city * List of active products * List customers by product * List top 5 recent customers by product |

* There will be database tables to store each data component of the use cases
* The data model should show the relation between the data components
* Maintain product list and their related coverage in separate tables
* The system should generate reports based on data stored in the database. The SQL queries for each report needs to be developed along with a report format. The generated reports should be displayed on a web page.
* The project will be implemented as per the design document developed for it

Entity Relation Data Model

Username

Password

FirstName

LastName

Users

CustomerID

ID\_No

FirstName

LastName

Gender

Contact NoEmail  
Address

Customer

VehicleReg

Customer ID

VehicleModel

VehicleMake

Current Cost

Product ID

Period

Insurance Inquiry

\*

1

1

1

\*

1

Collision

CoverageID

PhysicalDamage

PersonalInjury

Liaility

Comprehensive

MedicalPaymentsCover

CoverageRequirement

Product ID

Product Name

Product Type

Description

Active

Product

1

\*

Coverage ID

Product ID  
Coverage Name

Coverage

Use-Case Diagram

Customer

Customer Service representative