**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 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** |
| 1 | Accept Customer Details | * Capture basic customer details like 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. |
| 2 | 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 |
| 3 | Accept Coverage Requirements | Capture coverage requirements like coverage required, possible limit of coverage and location. |
| 4 | Reports | * List of customers by city * List of active products * List customers by product * List top 5 recent customers by product |

* There will 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

Req ID

Customer ID

Product ID

Current Cost

Period

Vehicle Model

Policy Requirement

Customer ID

Customer Name  
Address

Contact No

Email

Customer

1

\*

1

Coverage Req ID

Req ID

Coverage Requirement

1

\*

Coverage ID

Product ID  
Coverage Name

Coverage

1

\*

1

Product ID

Product Name

Product Type

Description

Active

Product

Use-Case Diagram

Customer

Customer Service representative