**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. |
|  | Accept Insurance Requirements | * 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 |

**System Requirements**

**Inquiry Process**

1. Customer enquires with an Agent via a phone regarding insurance enquiry
2. Agent first gets the Customer contact details.
3. Agent determines insurance requirement of Customer. The agent asks the relevant questions to get the requirements.
4. Agent determines the product which matches the requirements
5. The agent informs the customer regarding the product and its features

Additional details to implement the requirements:

* The agent will ask a set of questions based on product required
* 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.

Entity Relation Data Model

Agent ID

Username

Password

FirstName

LastName

Agent

CustomerID

ID\_No

FirstName

LastName

Gender

Contact NoEmail  
Address

Customer

Enquiry ID

Enquiry date

Agent ID

Customer ID

Product ID

Period Reqd

Insurance Inquiry

\*

1

1

1

\*

1

Enquiry ID

Coverage ID

CoverageRequirement

Product ID

Product Name

Product TypeID

Description

Active

Product

1

\*

Coverage ID

ProductID  
Coverage Name

Coverage

Product TypeID  
Name

Description

ProductType

The below Class diagram shows that you have different fields based on product type

Product ID

Vehicle Make  
Vehicle Model

Vehicle Reg

Mfg date

price

Auto Policy

Enquiry ID

Customer ID

Product ID

Period Reqd

Insurance Inquiry

Product ID

Price

Property policy

Use-Case Diagram

Customer

Customer Service representative