

User Manual

Preparation

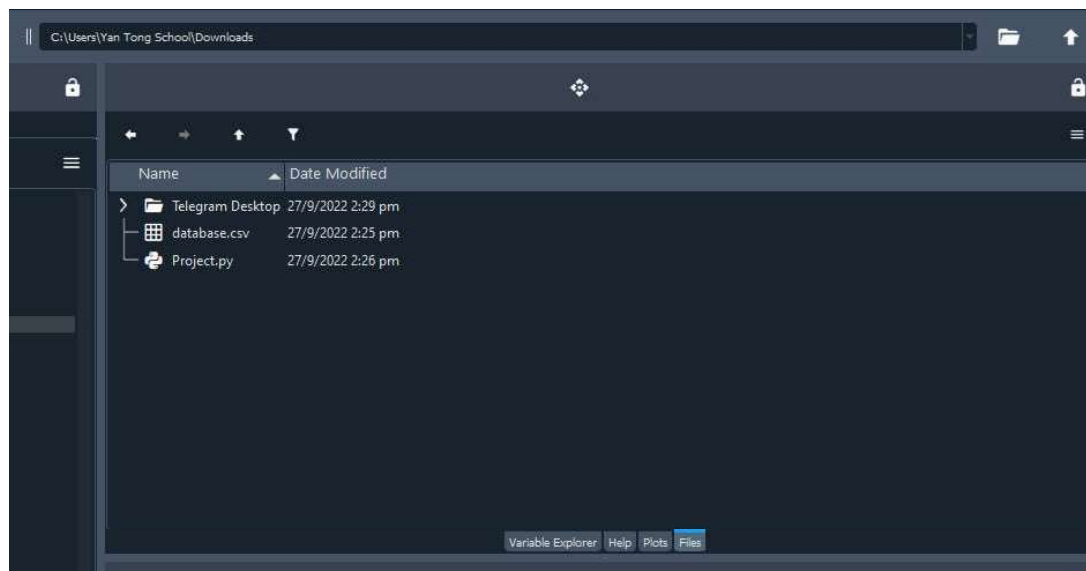
Ensure that you have downloaded the correct files and stored them in the same file location.

For this example, we used the following folder: C:\Users\Yan Tong School\Downloads



Spyder

Navigate to your spyder application and launch the following file: Project.py. You will have to navigate spyder's file explorer, present on the right side of the launcher, to locate the following file destination: C:\Users\Yan Tong School\Downloads. This step is also essential in ensuring that spyder recognizes the database.csv file, which will be used in a later step.



Start the Program

To start running the program, we can make use of the various tools in the toolbar, shown below.

To start the program, press the green triangle button.



At this stage, if you encounter any errors, please ensure that the previous step has been done properly. Check that the file destination in spyder accurately shows the file destination from which the database.csv is stored.

Log in

User will input their assigned username and password to log into the program. In the case where the user does not have an existing account, the user will be able to create a new account instead.

```
Welcome to AB0403 Team 8 Insurance Advisor Program.
We are honored to be providing this service to our
clients.

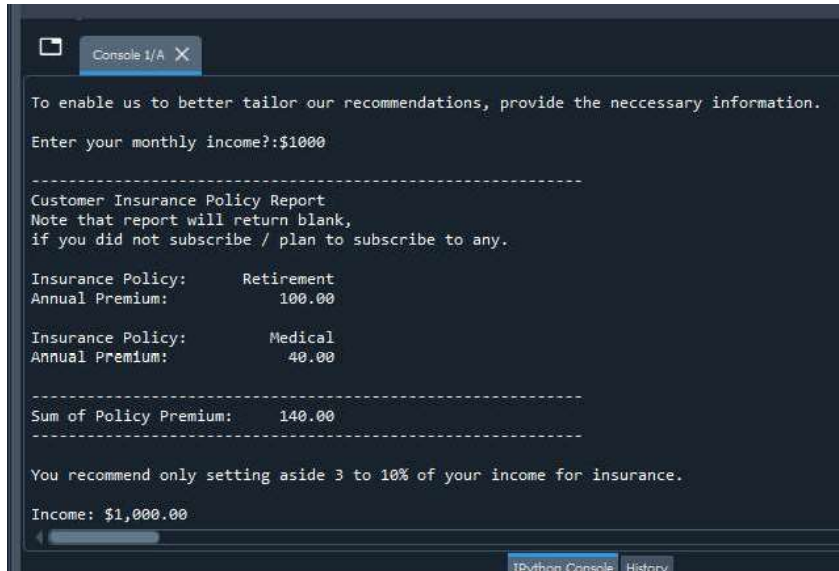
Login with username and password, assigned previously.
If you are a new user, please select accordingly.
Password Hint: Course Code

Do you have an existing account with us? Y/N:
```

Current Policy Report

A policy report will be printed on the screen displaying the various existing policies existing users has subscribed to. This report will return blank for new users. The policy report will show a

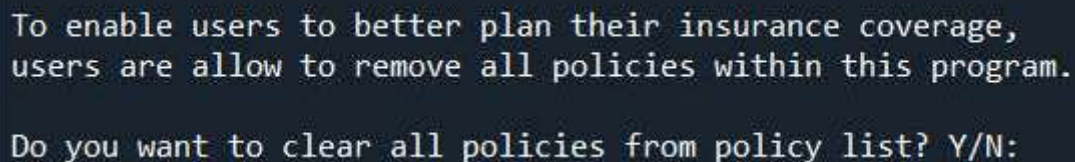
detailed breakdown based on the type of policy and the amount of monthly premium for each policy. The report will also show a sum of the monthly premiums for the existing coverage.

A screenshot of a Python console window titled 'Console 1/A X'. The text inside the console is as follows:

```
To enable us to better tailor our recommendations, provide the necessary information.  
Enter your monthly income?:$1000  
  
-----  
Customer Insurance Policy Report  
Note that report will return blank,  
if you did not subscribe / plan to subscribe to any.  
  
Insurance Policy:      Retirement  
Annual Premium:       100.00  
  
Insurance Policy:      Medical  
Annual Premium:        40.00  
  
-----  
Sum of Policy Premium: 140.00  
-----  
  
You recommend only setting aside 3 to 10% of your income for insurance.  
  
Income: $1,000.00  
|-----|  
Python Console History
```

Remove All Policies

This section gives the user the ability to remove all policies in the policy list. This change is only updated within the program. Users might want to perform such an action to start planning their coverage from scratch, without any influence from existing policies. After all the policies have been removed, a modified policy report will be displayed. This serves to validate that all policies have been removed.

A screenshot of a Python console window with a dark background and light green text. The text inside the console is:

```
To enable users to better plan their insurance coverage,  
users are allow to remove all policies within this program.  
  
Do you want to clear all policies from policy list? Y/N:
```

```
Do you want to clear all policies from policy list? Y/N:Y
All policy removed.
```

```
Modified Policy Report:
```

```
-----
Customer Insurance Policy Report
Note that report will return blank,
if you did not subscribe / plan to subscribe to any.
```

```
-----
Sum of Policy Premium:      0.00
-----
```

Main Program

The main program allows users to navigate through the two broad themes of Health and Wealth. At this point, users will be allowed to exit the program, if they wish to do so. Within each broad theme, there are sub-categories of policies that provide different coverages.

Users can explore all the policies listed in the program. Subsequently, users are able to exit the program at any time at the module level. The program also allows users to plan their coverage directly within the program. To purchase or update customers' insurance coverage, users are expected to approach our friendly agents, with the data report generated from this program, to aid the discussion process.

```
You have entered the main program.
We offer policies in these two broad themes: Health and Wealth.
Which theme would you like to explore? E to Exit.:
```

```
-----  
Welcome to the Health Module.  
Within the theme of Health, we offer 3 types of insurance.  
They are: Medical, Accident and Vaccination.  
Please select which type of Insurance you are interest in.  
  
Which category would you like to explore?  
Medical, Accident or Vaccination. Input E to Exit.:
```

```
-----  
Welcome to the Wealth Module.  
Within the theme of Wealth, we offer 3 types of insurance.  
They are: Savings, Retirement and Investment.  
Please select which type of Insurance you are interest in.  
  
Which category would you like to explore?  
Savings, Retirement or Investment. Input E to Exit.:
```

Updated Policy Report

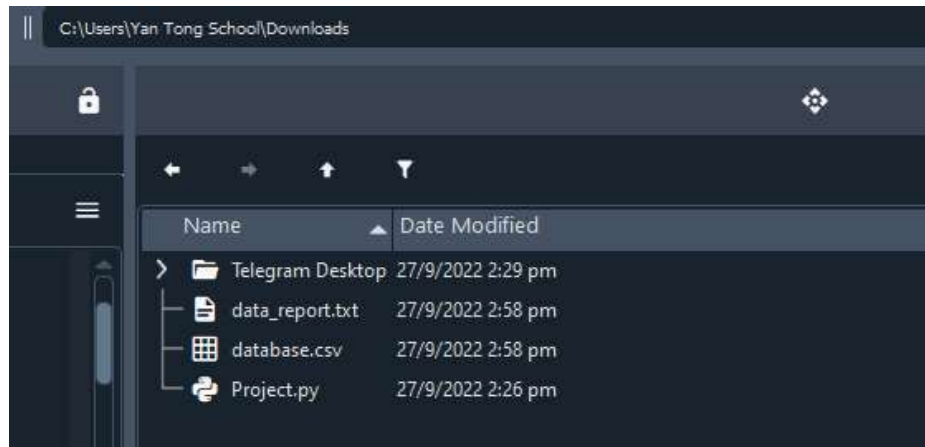
A updated policy report will be printed on the screen displaying the various policies the user has planned for their coverage. The policy report will show a detailed breakdown based on the type of policy and the amount of monthly premium for each policy. The report will also show a sum of the monthly premiums for the existing coverage.

Data Report

A data report, data_report.txt, will be generated after the user has exited the main program. This data report will include the updated policy report, which holds the various policies that the user has planned to include in their coverage after going through the main program. It will also include all personal information provided by the user.

To navigate to the report, go to the following file location: C:\Users\Yan Tong School\Downloads to retrieve the data report. This file location will be based on the location specified in an earlier step.

In line with our company's personal data policy,
all user information will be presented in a personal data report.
The personal data report has been saved to your device.



Database Update

The database will be updated with updated information after the running of the whole program.

This process is transparent to the end user. The CSV file, database.csv, will be rewritten to include the updated user information.