Functional Specifications

“MVP2 – Week Four”

Document Information

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# Introduction

New ABSLI Advisor application is a unified portal, combining all major functionalities of Advisor portal, BSLI Way and BSLI Online under one single umbrella. All existing user roles will be able to access the new portal and based on logged in user role, respective modules will be shown as per the requirement. For this phase, we are considering all user roles and its functionality.

## Purpose

Since all the three portals are developed in older versions of SharePoint and licence for the same is getting expired, it's been decided to unify all three portals and create a new one in latest open source technologies.

## References

* User stories and VD shared for week 4

## Assumptions

* All functional ESB API will be modified/created by ABSLI Team and shared to TSL.
* TSL will create a middle wrapper layer for calling these ESB API which will be consumed from the client.
* Few blocks/modules decided to be build using RDS will be fetched as stored procedures, where wrapper API will be created in middleware for consuming it from client.

## Dependencies

Following are some of major dependencies for MVP2 – Week4

* 1. Pending Wireframes and VD for all the modules present in week 3 module has to be made available for development.
  2. VD’s should be shared using a tool where all required assets are available for download and developers can inspect and get the relevant information required for implementation.
  3. ESB API request/response, schema/structure should be made available to TSL for starting middleware API development.
  4. **ESB API should accept required inputs and should cater to paging, filter and search functionality, else ESB API’s will be consumed to get all relevant data and stored in RDS daily for the relevant users, stored procedures will be used to cater to screen/module requirements.**
  5. **RDS data will be populated via database table views or API**
  6. **If ESB API can’t provide commission and RnR data as requested, then they will be populated in RDS and will be consumed in front end as per requirement.**

## In-Scope

* 1. Fully functional mobile adoptive/responsive pages as per approved VD and user stories.
  2. Week 4 User stories are:
     1. Front Line employee - R&R - FLS R&R
     2. Front Line employee - R&R - FLS My Portfolio - Team R&R Performance
     3. Front Line employee - R&R - FLS My Portfolio - Team R&R Performance - Contest wise list of each reportee
     4. Supervisor - R&R - Supervisor - My Portfolio - Team R&R
     5. Front Line employee - R&R – R&R – Reward Choice Module
     6. Agent Dashboard – Advisor in DSF/APC
     7. Agent Dashboard - Agent Dashboard - HDFC, TPD, DM
     8. Agent - Global Search - One-to-One Search
     9. Agent - Global Search - Search by Name
     10. Agent - Global Search - Search by Policy ID
     11. Agent - Global Search - Search by PAN
     12. Agent - Global Search - Search by Mobile
     13. Agent - Global Search - Recent Searches
     14. Agent Manager - Global Search - Agent Manager - Global Search Landing Page
     15. Agent Manager/Supervisor - Global Search - Agent Manager - Search by Reportee
     16. Agent Manager/Supervisor - Global Search - Agent Manager - Search by Customer

# Functional Requirements

## Front Line employee - R&R - FLS R&R

### Requirement

**Description**:

FLS/Supervisor - DM, DSF, APC, HDFC, TPD

As an FLS/Supervisor in any channel, I should be able to see my performance in R&R daily

**Details**:

Screens same as those for an Advisor

1. MySelf/MyPerformance Landing Page

"As on Date" to be updated

Banner - configurable auto/manual notifications with CTAs

Header - Title "Achievement" - "Star Club" (One Card with As on date)

Quick Links - R&R, Updates, Team R&R [only for roles which have a team management

My Contests

- 2 Tabs - Running Contests, Closed Contests [Same details as Advisor]

Additional Parameters on Contests Details page - should be dynamically configured from system - to show all applicable parameters -eg [IF FLS is from DSF/APC],

Sample Parameters - No. of Active Advisors, No. of New Licenses, WFYP

### Implementation Approach

My Self is a new page for all three user roles. Based on logged in user\_role, fields and sections to be shown in this page will vary. User will navigate to this page from top menu My Self option.

|  |  |  |
| --- | --- | --- |
| **Role** | **Section** | **Blocks/CTA/Links** |
| Advisor | Notifications | Self-targeted notifications |
| Agent Manager | Notifications | Self-targeted notifications |
| Supervisor | Notifications | VD not shared |
| Advisor | Top cards | Last Commission Paid, Total Commission Paid |
| Agent Manager | Top cards | Achievement |
| Supervisor | Top cards | VD not shared |
| Advisor | Quick Links | Tax Statements, Commission Statements, Updates |
| Agent Manager | Quick Links | RnR, Team RnR, Updates |
| Supervisor | Quick Links | VD not shared |
| Advisor | Content Blocks | Latest 5 commissions, Latest 5 RnR |
| Agent Manager | Content Blocks | Latest 5 RnR |
| Supervisor | Content Blocks | VD not shared |

Please find below the UI element mapping for the three roles. Based on the logged in user role, top blocks, quick links and main sections will be handled. This section will cover details for Agent manager and supervisor user roles.

Notifications which are matching scheduled to be shown, will be fetched from RDS using a new procedure and to be shown to the user based on logged in user role.

Top cards, Achievement also will be fetched from ESB API, based on logged in user role and to be shown.

Quick links are static links which will have RnR, Team RnR and Updates as links.

Agent manager and supervisor role will have only RnR sections where data will be fetched using ESB API.

Fields to be shown in RnR block – Running Contest:

Contest Period, Name of Contest, Reward Achieved (on issuance), Status. CTA: View Details- to be taken to Contest summary page

Fields to be shown in RnR block – Closed Contest:

Contest Name, Contest End date, Reward, Choice, Payout Status. CTA: View More- to shown additional details below the selected record.

View More Fields: Payout Mode, Payment Date, Bank Account Number, UTR Number

See More to take to contest listing page.

### 2.1.3 API and RDS Requirements

Data for notification will come from RDS, achievement, running and closed contests data will come from ESB API

Please refer week2 Sno 4 to 5 in the attached excel for RnR section’s API/RDS requirements and Week4 Sno 20 to 21 for notification and achievement blocks.

### 2.1.4 CTA Templates

**On Page Toast message**:

NA

**Email:** NA

**SMS:** NA

### 2.1.5 Open Points

NA

## Front Line employee - R&R - FLS My Portfolio - Team R&R Performance

### Requirement

**Description**:

As an Agent Manager in any channel, I should be able to view performance of team for R&R under My Portfolio

**Details**:

Add Quick Link - > Team R&R from Landing Page

Team R&R Page - 2 Tabs - Running Contest, Closed Contest, CTA - Download

Running Contests

Name of Contest, No. of Eligible Reportees, No. of Qualifiers, "View Details"

-> Open Contest-wise List Page

Closed Contests -

Name of Contest, No. of Eligible Reportees, No. of Qualifiers, "View Details" -> Open Contest-wise list page

Search by Contest Name

Filter by

[Running]

Contest Name

Contest Type - Monthly, Quarterly, Annual, Others

[Closed]

Select Year - Last 3 years [2019, 2020, 2021]

Contest End Date - This Month [Calendar Month], This Quarter [FY Quarters], This FY, Custom Range [From MMM-YY To MMM-YY for a max period of 1 year, not restricted to FY, To field should update dynamically based on From field input] -- BRD to define valid period

Download ->

-> If Tab selected = Running Contests- Should download xls of all currently running contests

Fields: Contest Name, Contest Period, Agent Name, Agent ID, Final Reward, Reward Achieved [On Intro], Shortfall for Next Slab [On Intro, on all applicable parameters], Reward Achieved [On Issuance], Shortfall for Next Slab [On Issuance, on all applicable parameters],

Toast Message: "Details of all running contest downloaded successfully"

If Tab = "Closed Contests"

Fields: Contest Name, Contest Period, Agent Name, Agent ID, Reward Achieved, Choice, Status of Settlement, Details of Settlement [If Monetization, Amount, Paid Date, UTR Number for Advisors, Else Amount and Paid Date; If Gift - Show POD Details - Date of Dispatch, Branch Receiving Date]

Toast Message: "Details of all selected contests downloaded successfully"

### Implementation Approach

This is new page for agent manager and super visor roles. This page will be invoked from Team RnR quick link from My Self page. This page will have two tabs. Running Contests and Closed Contests.

**Running Contests:**

This page data will be fetched from ESB API. This section will have filter and search.

**Fields to display running and closed contest:**

Name of contest, No of eligible Reportees, No of qualifiers. Download and View Details CTA.

View Details will take user to Contest wise Reportee listing page. Download CTA will download excel files with details given and toast message will be shown to user.

**Running contest Filter:**

Contest Type and Contest End date.

**Closed contest Filter:**

Contest Type, Year and Contest end date.

**Fields to display in Excel download for running contest**:

Running Contests- Should download xls of all currently running contests

Contest Name, Contest Period, Agent Name, Agent ID, Final Reward, Reward Achieved [On Intro], Shortfall for Next Slab [On Intro, on all applicable parameters], Reward Achieved [On Issuance], Shortfall for Next Slab [On Issuance, on all applicable parameters]

Toast Message: "Details of all running contest downloaded successfully"

**Fields to display in Excel download for closed contest**:

Contest Name, Contest Period, Agent Name, Agent ID, Reward Achieved, Choice, Status of Settlement, Details of Settlement [If Monetization, Amount, Paid Date, UTR Number for Advisors, Else Amount and Paid Date; If Gift - Show POD Details - Date of Dispatch, Branch Receiving Date]

Toast Message: "Details of all closed contests downloaded successfully"

### 2.2.3 API and RDS Requirements

ESB API’s will be created for showing the data as per VD and also for excel download.

Please refer Sno 1 to 4 in the attached excel for the API/RDS requirements.



### 2.2.4 CTA Templates

**On Page Toast message**:

Toast Message: "Details of all closed contests downloaded successfully"

Toast Message: "Details of all running contest downloaded successfully"

**Email:** NA

**SMS:** NA

### 2.2.5 Open Points

NA

## Front Line employee - R&R - FLS My Portfolio - Team R&R Performance - Contest wise list of each reportee

### Requirement

**Description**:

As an Agent Manager in any channel, I should be able to view contest-wise list of all reportees for R&R under My Portfolio

**Details**:

Contest-wise list page ->

Title -> <Contest Name>, As on <Date>

Agent wise Performance List (Multiple Rows on a new page "Contest-wise Agent List")- On Intro, On Issuance

Reportee Name, Employee/Business Code, Reward Achieved (On Intro), - Upfront (Rows)

CTA "Contest Details" -> Should Lead to Contest details page for the selected agent + Code from dropdown

Closed Contest List Page - <Contest Name>

Reportee Name, Employee/Business Code, Reward Achieved (On Issuance), Choice, Payout Status CTA-> View Details

<Expand to Show all conditional fields as defined for an Agent>

Search by

Reportee Name - [to dynamically pickup list from system] Show Search field + 4 values with "Show More" -- to revise (Like Product Search & List - Existing Design)

### Implementation Approach

This is a new page and will be available for all manager and supervisor roles. This page will be navigated on click of View Details CTA from Team RnR contest listing page. ESB API will be used for getting the data.

**Fields to display for Running Contest wise reportee list:**

Reportee Name, Employee/Business Code, Reward Achieved (On Intro), CTA – Contest Details. On click of this CTA will take user to contest summary page for selected reportee.

**Fields to display for Closed contest wise reportee list:**

Reportee Name, Employee/Business Code, Reward Achieved (On Issuance), Choice, Payout Status CTA-> View More

View More will show below conditional fields.

If Reward Qualified= ""Gift A"" | ""Conventions""

Choice = <Gift, Convention, Encashment>

Option Selected = ""Gift"", Field - If Dispatched, Show <Date of Dispatch> ELSE ""Pending""

Option Selected = "Encashment" , Fields - Gross Earning, Deductions (Recovery Amount, Expenses etc), TDS Deducted, Net Earning,

If Payout Status= Paid, Payment Date, Masked Account Number, UTR Number

ELSE, Show "Pending"

Option Selected = "Conventions" --- what to show - Pending from business.

### 2.3.3 API and RDS Requirements

ESB API will be used for showing all the sections of this new page based on the logged in user role.

Please refer Sno 3 to 6 in the attached excel for the API/RDS requirements.



### 2.3.4 CTA Templates

**On Page Toast message**: Pending from business for Download CTA

**Email:** NA

**SMS:** NA

### 2.3.5 Open Points

1. Toast message for download CTA
2. Fields to be shown in View More CTA for closed contests for gift type convention.

## Supervisor - R&R - Supervisor - My Portfolio - Team R&R

### Requirement

**Description**:

As a Supervisor in any channel, I should be able to view performance of team for R&R under My Portfolio

**Details**:

[Backend]

Same as for agents

Show reportee wise performance under each contest -> CTAs - View Details -> Open Contest Details Page for Reportee

To View N-x level performance (x>1), Go to My Portfolio > Reportee List > Select ""View Portfolio"" on any Reportee > Go to Agent List > Select ""View Contests"" to see performance in any contest

### Implementation Approach

From supervisor My Portfolio page, From Reportee list, supervisor can select View Portfolio to land on his reportee’s portfolio page with dropdown at top with the selected agent manager name filled by default. This drop down to list all the reportees, when selected this page should refresh content for the selected reportee. From this page, logged in supervisor user will navigate to All Agents page which will have View Contents CTA against each agent. On click will take user to contest listing page of the selected agent. From here logged in user can click on View Details to land on individual contest page of the agent.

Additional Fields to display in contest summary page:

New Top block with Name, Employee/Business code and View Contest Details CTA.

ESB API will be used in my portfolio page to show the dropdown of reportees when viewed by supervisor role. Please refer to week 3 FSD for My portfolio page details.

### 2.4.3 API and RDS Requirements

Please refer to sno 8 of the attached API mapping sheet for exact RDS/API details



### 2.4.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.4.5 Open Points

NA

## Front Line employee - R&R – R&R – Reward Choice Module

### Requirement

**Description:**

As an Advisor, FLS, Supervisor in any channel, I should be able to provide my choice of reward for any closed contests through the portal

**Details**:

As an Advisor, FLS, Supervisor in any channel, I should be able to provide my choice of reward for any closed contests through the portal

Choice module to be configured through Admin Panel for any contest by R&R Admin User - Name of contest, Dates on which Choice needs to be captured, choices available; User should be able to select desired option through portal; R&R Admin User should be able to download Choices from Admin Portal; Choice Selected should be shown under Closed Contest Tab

1. Banner - Inform user when a choice needs to be updated with CTA to input choice

2. If Choice is to be taken as an input - Under "Closed Contests" tab for respective contests under "Choice Field" - Show CTA - "Provide Choice" -> Open Modal to show details of choices -> "Please select the option you would like to receive as a reward for <Contest Name> before <Choice End Date]. You will not be able to change this choice later. If you don't select by <Date>, default option of <Default Choice> will be provided" - Option A,...[to be configured from Admin]" -> "Confirm" "Cancel"

If "Confirm"- > Show selected Choice under contest, else show the default choice "Monetization"

Backend - BRD to detail functioning of choice module based on functionality available in current portal thorugh an xls upload - connect with IBM Team/Sonali Padulkar

### Implementation Approach

This option will be shown in closed contest listing page if logged in user has not already selected the choice of reward.

When not selected option Provide Choice CTA will be shown, on click API will be called to get the choice list for the particular contest and will be shown to logged in user to select. Once the user selects and Confirms, the same will be updated against the contest.

The model dialog will be shown as per VD.

### 2.5.3 API and RDS Requirements

Please refer week 2 FSD for closed contest API details

Please refer to Sno 9 to 10 for API/RDS field mapping details.



### 2.5.4 CTA Templates

Please refer week 2 FSD for details

### 2.5.5 Open Points

Source system from where these data can be pulled in to RDS.

## Agent Dashboard – Advisor in DSF/APC

### Requirement

**Description:**

As an Advisor in DSF/APC Channels or an FLS/FOS in DM/HDFC/TPD channels (roles directly mapped to customers), I should be able to get a snapshot of my business, performance and portfolio when logging in to the portal and should be able to prioritize my tasks for the day

**Details**:

Customizable Banner on top - for important updates - new contest, new product launches, Commission payout, PASA Offers, R&R choice to be provided, Upcoming Contests etc [Can be manually configured from Admin, or auto-triggered from some system; Can redirect to any external pages outside the portal, internal pages or open a pop-up on clicking]

Business Snapshot -

Total Active NOPs - with % change over last FY -> Click to open All Customer Page

Total FYP (for current FY) - with % change over same period last Year -> Click to open All Customers Page

Persistency (13th Month, NOP wise) -with % change over last year > Click to open Lapsed Customers List Page

Commission Earned YTD - with %change over same period last year -> Click to open Commissions Payout Page

Priority Actions for the Day

""X"" Policies Due for Renewal -> Click to open Renewal Due List Page

""X"" Customers have Bdays -> Click to Open Bday List Page

""X"" Policies Maturing -> Click to open Retention Tab under Recommendation List

""X"" Customers have PASA Offers Available -> Click to open PASA tab under Recommendation List

Performance

Running R&R Contests -> Contest Name, Shortfall on x parameter [parameter which has min % shortfall]

Quick Links -

Contest Updates

Send Tax Certificate

Send Premium Payment Receipt

Global Search - Will be able to search customers by Name, PAN, Policy ID, Phone

More Apps -> Navigate to other apps [ EApp, Sales Buddy, App Tracker, Channel Specific Apps [Vymo, LSQ]

### Implementation Approach

Dashboard is new page and will be available for all the three roles. This page will have 5 sections.

First is the, on page notification sections, which will be triggered using admin panel. This section will be shown from RDS and will be detailed out in admin module later.

Second is business snapshot, where Advisor in DSF/APC Channels or an FLS/FOS in DM/HDFC/TPD which will have

Total Active NOPs - with % change over last FY -> Click to open All Customer Page

Total FYP (for current FY) - with % change over same period last Year -> Click to open All Customers Page

Persistency (13th Month, NOP wise) -with % change over last year > Click to open Lapsed Customers List Page

Commission Earned YTD - with %change over same period last year -> Click to open Commissions Payout Page.

This section will also be fetched from RDS for all the user roles.

Third section will be Priority Actions for the Day, where below items will be shown.

""X"" Policies Due for Renewal -> Click to open Renewal Due List Page

""X"" Customers have Bdays -> Click to Open Bday List Page

""X"" Policies Maturing -> Click to open Retention Tab under Recommendation List

""X"" Customers have PASA Offers Available -> Click to open PASA tab under Recommendation List

Fourth section will be Performance – RnR where

Running R&R Contests -> Contest Name, Shortfall on x parameter [parameter which has min % shortfall] will be shown as cards. This section will latest 3 contests based on contest dates and if there are more records View All CTA will be provided, on click will take user to RnR listing page.

Fifth section is quick links which will have Tax Statements, Premium Paying Receipts and Contest Updates.

### 2.6.3 API and RDS Requirements

Whole page data will be fetched from RDS and wrapper API will be made and rendered in front end.

Please refer to sno 11 to 13 of the attached API mapping sheet for exact API details



### 2.6.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.6.5 Open Points

NA

## Agent Dashboard - Agent Dashboard - HDFC, TPD, DM

### Requirement

**Description:**

As an RO in HDFC, TPD, DM Channel - Dashboard

**Details**:

Customizable Banner on top - for important updates - new contest, new product launches, PASA Offers, R&R choice to be provided, Upcoming Contests etc [Can be manually configured from Admin, or auto-triggered from some system; Can redirect to any external pages outside the portal, internal pages or open a pop-up on clicking]

Business Snapshot -

Total Active Customers - with % change over last FY -> Click to open All Customers Page

Total Active NOPs - with % change over last FY -> Click to open All Customer Page

Total FYP (for current FY) - with % change over same period last Year -> Click to open All Customers Page

Persistency (13th Month, NOP wise) -> Click to open Lapsed Customers List Page

Priority Actions for the Day

""X"" Policies Due for Renewal -> Click to open Renewal Due List Page

""X"" Customers have Bdays -> Click to Open Bday List Page

""X"" Policies Maturing -> Click to open Retention Tab under Recommendation List

""X"" Customers have PASA Offers Available -> Click to open PASA tab under Recommendation List

Performance

Running R&R Contests -> 3 cards - Contests that are Contest Name, Shortfall on x parameter [parameter which has min % shortfall]

Quick Links -

Send Tax Certificate, Send Premium Payment Receipt, Contest Updates

Global Search - Will be able to search customers by Name, PAN, Policy ID, Phone

More Apps -> Navigate to other apps [ EApp, Sales Buddy, App Tracker, Channel Specific Apps [Vymo, LSQ]

### Implementation Approach

Please refer section 2.6 for more details.



Only change for this user is not to show commission earned YTD in business snapshot section.

### 2.7.3 API and RDS Requirements

Please refer section 2.6 for more details.

### 2.7.4 CTA Templates

**On Page Toast message**: Pending from business.

**Email:** NA

**SMS:** NA

### 2.7.5 Open Points

NA

## Agent - Global Search - One-to-One Search

### Requirement

**Description:**

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search customers by Name, PAN, Phone, Policy ID so that I can provide them information on request

**Details**:

1. Select the parameter to search (Name, PAN, Phone, PolicyID), enter String to search

2. Should work without clicking of Search button

**3. Search should be executed in less than 400 ms**

4. Search > 10 results List > Search All

5. Should be able to match within any place in the parameter - Order of priority - match at beginning; Should work with space, special chars not allowed

3. Analytics: Track most used type of search query (Name, PolicyID, PAN, Mobile Number)

For which search strings did user get no results

Default Search by Name

### Implementation Approach

Global search will be initiated from search icon from top menu in desktop and bottom menu from mobile responsive view. When clicked, model dialog will be opened with option to search customer/policy by Name, PAN, mobile and policy id. Default tab will be by Name.

Model will have text box to enter the search text, for name, up on entering 3rd character, middleware API will be called to fetch the matching result and will be shown as per VD. The search will include policy owner, assignee, life insured.

Top 10 results will be shown with option to see all results as per VD. See all results CTA will take user to a new page where all search results will be shown with lazy loading.

Fields to display in all search result page:

Name, mobile, User Type, favourite icon.

On clicking search result, user will be taken to either customer or policy detail based on the option in which there are searching. Details will be given in subsequent sections.

Also, under each search option, recent search box will be show with top 10 recent searches with option to see more which will take user to see all the recent searches with option to clear and view as per VD.

### 2.8.3 API and RDS Requirements

RDS will be used for search with middleware API layer for consuming from front end.

API details will be shared in subsequent sections where each search by option is detailed out.

### 2.8.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.8.5 Open Points

NA

## Agent - Global Search - Search by Name

### Requirement

**Description**:

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search by client name so that I can service the client with details of all their policies, eg tax certificate, payment link, etc

**Details**:

1. Search should work with min 3 characters

2. Search should be within both first name, last name of Policy Owner and Life Insured

Show tag against the name whether "Policy Owner" or "Life Insured"

3. Click on search result should take to Customer Details Page - Overview section

4. One search result per client (even though client may have n policies)

5. 10 Search results should be shown, and then have a "Load More" to load next 10 search results

6. Search String > Suggestions > Click on Suggestion - Customer Details Page

Search String > Do not pick from suggestions > Search Results Page (same as "All Customers" Page) > Customer Details Overview Section

Exceptions (to be detailed in BRD) - Search should also work on Assignee Name for Keyman/employer-employee/Loan against Policy cases

### Implementation Approach

Default search option in the global search model dialog is search by Name. Model will have search box to enter name. Below text box, suggestive text will be shown. Below that My Recent search section will be shown. It will empty with default message for new user who has not done any search or cleared his recent search history.

When user starts typing characters, after 3rd character, search will get triggered to find the matching records and top 10 result will be shown with See all results CTA if there are more than 10 matching records for the given input.

**Name to be searched in policy owner, life insured and also assignee in case of Keyman/employer-employee/Loan against Policy cases and to be shown as label in the search result, also one result should be shown even if there are multiple policies for a customer/agent/reportee.**

When a user selects a result from the list, will be taken to customer details – overview section. This behaviour is same from search model or all search result page.

Once user selects a result, the same has to be stored in RDS as search history of the logged in user, to be picked up and shown in my recent search section and its more page.

### 2.9.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.

### 2.9.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.9.5 Open Points

1. Default state message is pending
2. Suggestive test is pending

## Agent - Global Search - Search by Policy ID

### Requirement

**Description**:

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search by Policy ID so that I can service the client with details of the policy, eg tax certificate, payment link, etc

**Details**:

1. Exact Match (both with and without 0 appended)

2. Should lead to Policy Details Page - Overview section

3. Input on-screen Validations

Type - Numeric

Length - [3-9] digits

4. Help Text/Suggestions should be provided- eg "You can find Policy ID on policy doc", "Valid format is xxxxxx"

5. If 0 Search Results - "Try changing your search text or parameters" | Go to "All customers" to view all policies

### Implementation Approach

Model will have search by Policy ID option, user has to select it to do search by policy id. Below the text box, suggestive text will be shown. Below that My Recent search section will be shown. It will empty with default message for new user who has not done any search or cleared his recent search history.

Policy id search will happen only on complete entry of the policy id with or without 00. Policy id length is between 3 to 9 digits. User has to click on the search icon for the search to happen and show result.

If no records match for the given policy id, “We can’t find anything related to your search.

Try to search with a different policy ID or Go to “All customers” to view all policies” message should be shown with CTA to All customers page of the logged in advisor.

When a user selects a result from the list, will be taken to policy details – overview section. This behaviour is same from search model or all search result page.

Once user selects a result, the same has to be stored in RDS as search history of the logged in user, to be picked up and shown in my recent search section and its more page.

### 2.10.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.



### 2.10.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### Open Points

NA

## Agent - Global Search - Search by PAN

### 2.11.1 Requirement

**Description**:

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search by PAN number so that I can find information for customers who do not remember their policy IDs

**Details**:

1. Exact Match

2. Should open customer details Page overview section for the client with matching PAN number

3. Should search within PAN of Policy Owner/Life Insured/Assignee

4. Search Results to show the Search string used along with Name, Contact, Tags [Policy Owner, Life Insured, Assignee]

### 2.11.2 Implementation Approach

Model will have search by PAN option, user has to select it to do search by PAN. Below the text box, suggestive text will be shown. Below that My Recent search section will be shown. It will empty with default message for new user who has not done any search or cleared his recent search history.

PAN search will happen only on complete entry of the PAN. PAN length is 10 digits. After 10th digit, search will be initiated automatically.

If no records match for the given PAN, message to be displayed to the user.

When a user selects a result from the list, will be taken to customer details – overview section. This behaviour is same from search model or all search result page.

Once user selects a result, the same has to be stored in RDS as search history of the logged in user, to be picked up and shown in my recent search section and its more page.

### 2.11.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.



### 2.11.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.11.5 Open Points

Message to given for no records found.

## Agent - Global Search - Search by Mobile

### 2.12.1 Requirement

**Description**:

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search for details by Mobile number so that I can provide details to customers who do not remember their policy IDs

**Details**:

1. Exact Match

2. Should open list of policies with matching client contact number

3.On Click - Should lead to Policy Details Page - Overview section for that policy

4. Search Results Page to be shown

### 2.12.2 Implementation Approach

Model will have search by Mobile option, user has to select it to do search by Mobile number. Below the text box, suggestive text will be shown. Below that My Recent search section will be shown. It will empty with default message for new user who has not done any search or cleared his recent search history.

Mobile search will happen only on complete entry of the PAN. PAN length is 10 digits. After 10th digit, search will be initiated automatically.

If no records match for the given Mobile number, message to be displayed to the user.

When a user selects a result from the list, will be taken to policy details – overview section. This behaviour is same from search model or all search result page.

Once user selects a result, the same has to be stored in RDS as search history of the logged in user, to be picked up and shown in my recent search section and its more page.

### 2.12.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.



### 2.12.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.12.5 Open Points

Message to given for no records found.

## Agent - Global Search - Recent Searches

### 2.13.1 Requirement

**Description**:

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to see my recent searches so that I can quickly again access information of these clients

**Details**:

1. Last 10 executed searches (device agnostic)

2. Store search string under "Recent Search" when a result has been clicked when searched by client Name, for others, store when Search button is clicked

3. Clear All

4. Clear to be available for each item in recent search

5. Option to see Search History

6. Click on Recent Search to lead to Customer Details Page

### 2.13.2 Implementation Approach

When a user selects a search result from any search mode either from search model or all results listing page, API will be invoked to save the result selected by the user.

If same search result is again clicked by the user, then only one record should be maintained at the backend and old records time should be updated to appear at top of the recent search.

Click on each record, will take user to either customer or policy detail based on search mode parameter.

If there are more than 10 records in search history, option to view all recent search history will be provided, which on click will take user to all search history page with lazy loading.

Option will be provided to clear all recent history or one record at a time to user and the same will be executed via API calling RDS.

### 2.13.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.



### 2.13.4 CTA Templates

**On Page Toast message**: Successful clearing of all/single record from recent history is pending

**Email:** NA

**SMS:** NA

### 2.13.5 Open Points

Successful clearing of all/single record from recent history is pending from business.

## Agent Manager - Global Search - Landing Page

### 2.14.1 Requirement

**Description**:

As an Agent Manager or Supervisor in any channel, I should be able to search for my reportees and customers

**Details**:

1.2 Tabs -> Search Team or Customer

Default - Search

Parameters

- Customer: Policy ID, Customer Name, PAN, Phone

- Employee/Agent - Employee/Agent ID, Name

Default Search -> Customer > Name

Recent Search under each tab - Lat 10 successfully executed Search (where user selected and navigated to a page from Search Results Page), CTA to remove History

Customers: Customer Name, Phone Number (Masked if Channel = HDFC/TPD) -> View, Remove

Employees/Agent: Employee Name, Business/Agent/Empoyee Code, Phone Number -> View, Remove

CTA to "View Search History" -> Page will have 2 tabs (Customer, Team)

### 2.14.2 Implementation Approach

This search option is for agent manager and supervisor roles. For supervisor roles, both Search by customer and Team will be available and for agent manager availability of option will be based on designation and channel code.

By default, search by Customer option will be enabled in the model dialog and in that search by Name option will be the default one. All four options of Name, PAN, Mobile and Policy Id will behave the same way for advisor except the result will be fetched and shown from all customers of mapped to the logged in role.

Search result and search history to mask Phone Number (if Channel = HDFC/TPD)

Recent search history will have two tabs for these two roles and searches made under customer will be shown there and searches made under team will be shown in teams tab.

Please refer to sections 2.9 to 2.12 for the implementation of each of the search options.

### 2.14.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.



### 2.14.4 CTA Templates

**On Page Toast message**: Successful clearing of all/single record from recent history is pending

**Email:** NA

**SMS:** NA

### 2.14.5 Open Points

Successful clearing of all/single record from recent history is pending from business.

## Agent Manager/Supervisor- Global Search- by Customer

### 2.15.1 Requirement

**Description**:

As an Agent Manager/Supervisor in any channel, I should be able to search for any customers tagged to my team by Customer Name, Policy ID

**Details**:

1. Select Customer Tab on Search Page (Default selection)

Search by Name - Should be able to search within First, Middle, Last Name; Should work on minimum 3 chars, Responsive Search -> CTA to "View All results for "<Keyword>" -> Click on any row should lead to Customer Details Page

Search by Policy ID -> Should work on exact match - Click on Search button to enable Searching [BRD to Define input validations for all applicable formats] -> Show Customer Name, Mobile Number (Masked for HDFC/TPD) in Search results -> Click should lead to corresponding Policy Details Page

Search by PAN - Exact Search, - same as for Advisor

Search by Phone - Exact Search - Same as for Advisors

### 2.15.2 Implementation Approach

This search option will be available for agent manager and supervisor roles. Search by Customer will be the default option in the model dialog and search by Name will be the default option under customer search. It also has search by PAN, Mobile and Policy id similar to agent search.

Search by Name, PAN, Mobile and Policy ID will work same as defined in sections 2.9 to 2.12, but in search result and in my search history, mobile number will be masked for logged in user whose channel is HDFC/TPD.

### 2.15.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.



### 2.15.4 CTA Templates

**On Page Toast message**: Successful clearing of all/single record from recent history is pending

**Email:** NA

**SMS:** NA

### 2.15.5 Open Points

Successful clearing of all/single record from recent history is pending from business.

## Agent Manager/Supervisor - Global Search - by Reportee

### 2.16.1 Requirement

**Description**:

As an Agent Manager in any channel, I should be able to search for any employees/advisors within my hierarchy by Name or Employee Code/Business Code

**Details**:

1. Search result to show Employee/Agent Name, Business Code, Phone Number -> 3 dot action (Profile, Portfolio, Contests)

2. Selection of any Option to take to respective Details Page for the reportee

3. Search by Name - Should be able to search within First, Middle, Last Name; Should work on minimum 3 chars, Responsive Search -> CTA to "View All results for "<Keyword>"

4. Search by Employee Code/Agent Code -> Should work on exact match - Click on Search button to enable Searching [BRD to Define input validations for all applicable formats]

Search Result Page to show Employee/Agent Name, Business Code, Phone Number with 3 dot button [Profile, Portfolio, Contests]-> Select either of the option to go to corresponding Page

### 2.16.2 Implementation Approach

This search option is for agent manager and supervisor roles. For supervisor roles, both Search by customer and Team will be available and for agent manager availability of option will be based on designation and channel code.

Search by Team option has to be selected by logged in user, where search by Agent ID and Agent Name will be shown for agent managers and Reportee Id and Reportee Name for supervisor role.

Search by Agent/Reportee Id will be the default option for searching.

Agent/Reportee Id is an exact match search and search will be executed on search icon click.

Search result to show name, agent/business code, mobile number with three dots option which will have Profile, Customers and Contests options. Each of this click will take user to selected agent/reportee’s profile, customers/portfolio and contest pages respectively.

### 2.16.3 API and RDS Requirements

RDS will be used for searching and showing the results. Also, same will be used for storing search history also.

Please refer Sno 14 to 19 for RDS/API field mapping in the attached excel.



### 2.16.4 CTA Templates

**On Page Toast message**: Successful clearing of all/single record from recent history is pending

**Email:** NA

**SMS:** NA

### 2.16.5 Open Points

1. Successful clearing of all/single record from recent history is pending from business.
2. In agent manger search result, where should we take user when customers is clicked?

**END**