Contents

[Login 1](#_Toc1054941)

[Register 2](#_Toc1054942)

[Admin 2](#_Toc1054943)

[Agent 2](#_Toc1054944)

[Master 2](#_Toc1054945)

[State 2](#_Toc1054946)

[City 2](#_Toc1054947)

[RTO 2](#_Toc1054948)

[Make 3](#_Toc1054949)

[Model 3](#_Toc1054950)

[Variant 3](#_Toc1054951)

[Insurer 3](#_Toc1054952)

[Commission configuration 3](#_Toc1054953)

[SMS Configuration 4](#_Toc1054954)

[Email Configuration 4](#_Toc1054955)

[Lead 4](#_Toc1054956)

[Customer 5](#_Toc1054957)

[Basic details 5](#_Toc1054958)

[Policy details 6](#_Toc1054959)

[Vehicle details 7](#_Toc1054960)

[Reports 8](#_Toc1054961)

[Policy Report 8](#_Toc1054962)

[Commission Report 9](#_Toc1054963)

[Policy Renewal Report 9](#_Toc1054964)

# Login

|  |  |
| --- | --- |
| **Field** | **Type** |
| Email | Input Text |
| Password | Input Text |

# Register

|  |  |
| --- | --- |
| **Field** | **Type** |
| Full Name | Input Text |
| Email | Input Text |
| Mobile Number | Input Text |
| Role | ADMIN / AGENT |
| Password | Input Text |
| Confirm Password | Input Text |

# Admin

* Registration is restricted for Public users. Only Admin can register any user (Admin / Agent).
* Admin will have access to all the pages.

# Agent

**Can do:**

* Add / Edit / View Leads
* Add / Edit / View Customers
* Add / Edit / View Policies
* View Reports

**Cannot do:**

* Add / Edit / View Masters
* Register User

# Master

## State

|  |  |
| --- | --- |
| **Field** | **Type** |
| State Name | Input Text |

## City

|  |  |
| --- | --- |
| **Field** | **Type** |
| State | Dropdown |
| City Name | Input Text |

## RTO

|  |  |
| --- | --- |
| **Field** | **Type** |
| Reg No | Input Text |
| City | Dropdown |

## Make

|  |  |
| --- | --- |
| **Field** | **Type** |
| Make Name | Input Text |
| Is Top Make | Checkbox |

## Model

|  |  |
| --- | --- |
| **Field** | **Type** |
| Model Name | Input Text |
| Is Top Model | Checkbox |
| Make | Dropdown |

## Variant

|  |  |
| --- | --- |
| **Field** | **Type** |
| Variant | Input Text |
| Fuel Type | Dropdown : CNG/Diesel/LPG/Petrol/Electric |
| Model Id | Dropdown |

## Insurer

|  |  |
| --- | --- |
| **Field** | **Type** |
| Insurer Name | Input Text |

## Commission configuration

|  |  |
| --- | --- |
| **Field** | **Type** |
| Insurer | Dropdown |
| Vehicle Type | Dropdown:   * TWO WHEELER * PRIVATE CAR * THREE WHEELER * BUS * TAXI * GOODS * MISCELLANEOUS(MOTOR) |
| Plan Type | Dropdown:   * COMMERCIAL VEHICLE THIRD PARTY * COMPREHENSIVE * COMPREHENSIVE LONG TERM-3Years * COMPREHENSIVE LONG TERM-5Years * TP * TP LONG TERM-3Years * TP LONG TERM-5Years * ZERO DEPRECIATION |
| Commission % on OD | Input Text |
| Commission % on TP | Input Text |
| Commission % on Addon | Input Text |
| Commission % on Net Premium | Input Text |
| Flat Commission on OD | Input Text |
| Flat Commission on TP | Input Text |
| Flat Commission on Addon | Input Text |

## SMS Configuration

Configure SMS based on the User’s actions. A checkbox will be provided to enable/disable the features.

|  |  |  |
| --- | --- | --- |
| **Actions** | **Time** |  |
| Customer Registration | Choose time | Checkbox |
| Policy Registration | Choose time | Checkbox |
| Policy Renew Reminder | Choose time | Checkbox |
| Birthday | Choose time | Checkbox |
| Wedding Anniversary | Choose time | Checkbox |

## Email Configuration

Configure Email based on the User’s actions. A checkbox will be provided to enable/disable the features.

|  |  |  |
| --- | --- | --- |
| **Actions** | **Time** |  |
| Customer Registration | Choose time | Checkbox |
| Policy Registration | Choose time | Checkbox |
| Policy Renew Reminder | Choose time | Checkbox |
| Birthday | Choose time | Checkbox |
| Wedding Anniversary | Choose time | Checkbox |

# Lead

Lead generation is the initiation of consumer interest or enquiry into products or services of a business.

Leads may come from various sources or activities, for example, digitally via the Internet, through personal referrals, through telephone calls either by the company or telemarketers, through advertisements, and events.

Lead will become customer once a policy gets attached. After that Lead entry will be moved to Customer section.

|  |  |
| --- | --- |
| **Field** | **Type** |
| Lead Type | Dropdown:   * INDIVIDUAL * CORPORATE |
| Name | Input Text |
| Mobile | Input Text |
| Email | Input Text |
| Source | Dropdown:   * TELECALLING * REFERENCE * DIRECTSALES |
| DOB | Input Text |
| Wedding Anniversary Date | Input Text |
| Lead Status | Checkbox:   * ACTIVE * INACTIVE |
| Created By | Auto Generated from Logged In User |
| Created Date | Auto Generated |

# Customer

## Basic details

|  |  |
| --- | --- |
| **Field** | **Type** |
| Customer Type | Dropdown:   * INDIVIDUAL * CORPORATE |
| Name | Input Text |
| Mobile | Input Text |
| Email | Input Text |
| Source | Dropdown:   * TELECALLING * REFERENCE * DIRECTSALES |
| Aadhar No | Input Text |
| PAN No | Input Text |
| DOB | Input Text |
| Wedding Anniversary Date | Input Text |
| Created By | Auto Generated from Logged In User |
| Created Date | Auto Generated |

## Policy details

|  |  |
| --- | --- |
| **Field** | **Type** |
| Policy Number | Input Text |
| Policy Issue Date | Input Text |
| Policy Effective Date | Input Text |
| Policy Tenure in Years | Input Text |
| Policy Expire Date | Input Text |
| Insurer | Dropdown from Insurer |
| Vehicle Type | Dropdown:   * TWO WHEELER * PRIVATE CAR * THREE WHEELER * BUS * TAXI * GOODS * MISCELLANEOUS(MOTOR) |
| Plan Type | Dropdown:   * COMMERCIAL VEHICLE THIRD PARTY * COMPREHENSIVE * COMPREHENSIVE LONG TERM-3Years * COMPREHENSIVE LONG TERM-5Years * TP * TP LONG TERM-3Years * TP LONG TERM-5Years * ZERO DEPRECIATION |
| ODPremium | Input Text |
| TPPremium | Input Text |
| ADDONPremium | Input Text |
| NETPremium | Pre calculated (ODPremium+ TPPremium+ ADDONPremium) |
| GST | Input Text |
| TaxAmount | Pre Calculated based on GST |
| GrossPremium | Pre Calculated (NetPremium+TaxAmount) |
| PaymentOption | Dropdown:  CASH  CHEQUE  DRAFT  ONLINE |
| IsActive | Checkbox |
| Additional Info | Input Text |
| Policy Documents | Document Upload |

## Vehicle details

|  |  |
| --- | --- |
| **Field** | **Type** |
| Reg No | Input Text |
| Make | Dropdown |
| Model | Dropdown |
| Fuel Type | Dropdown |
| Variant | Dropdown |
| Registration Year | Dropdown |
| Engine No | Input Text |
| Chasis No | Input Text |
| CC | Input Text |
| Seating Capacity | Input Text |
| IDV | Input Text |
| No Claim Bonus | Input Text |
| Discount | Input Text |

# Reports

All Reports can be filtered based on date range (Monthly, Quarterly, Half Yearly, Yearly, Custom date range)

All reports can be exported to Excel/PDF.

Reports displayed based on the Agent login.

Admin can view reports for all Agents. Admin can filter all reports based on the Agent.

## Policy Report

|  |
| --- |
| **Field** |
| Name |
| Mobile |
| Insurer |
| Policy Type |
| Vehicle No |
| Policy No |
| OD Premium |
| TP Premium |
| ADDON Premium |
| Net Premium |
| Gross Premium |
| Policy Issue Date |
| Start Date |
| Expiry Date |

## Commission Report

|  |
| --- |
| **Field** |
| Insurer |
| Policy Type |
| Vehicle No |
| Policy No |
| OD Premium |
| TP Premium |
| ADDON Premium |
| Net Premium |
| Gross Premium |
| Policy Issue Date |

## Policy Renewal Report

|  |
| --- |
| **Field** |
| Name |
| Mobile |
| Email |
| Insurer |
| Policy No |
| Policy Type |
| Expiry Date |
| Reg No |
| Make |
| Model |
| Address |
| City |