## Re: First Premier Home Warranty UAT Release

Joey Sayegh <joey@firstpremierhomewarranty.com>

Fri 12/15/2023 3:51 AM

To:devteam <devteam@one41.ch>
Cc:sarbajit@sundewsolutions.com <sarbajit@sundewsolutions.com>
Hello Team.

#### For Service Call Fee:

\$45 Only Allowed for 2,3,5 Year Plans

\$60

\$75

\$100

\$125

# **Holding Period**

Should Be Auto set to 30 days. If we need to adjust waiting period on the customer profile have a calendar Rep can set a specific date.

Escrow: Please outline like the following

Edit - Let it open into the customer profile right now it opens up the sales form. Let it open into the customer profile then they can adjust the policy in the profile.

Name - Full Name

Sale By: Sales Rep or Realtor Name (If Done On Realtor Portal)

**Policy Number** 

Payment Status - Escrow - Pending
Name it Plan Total Instead of Amount

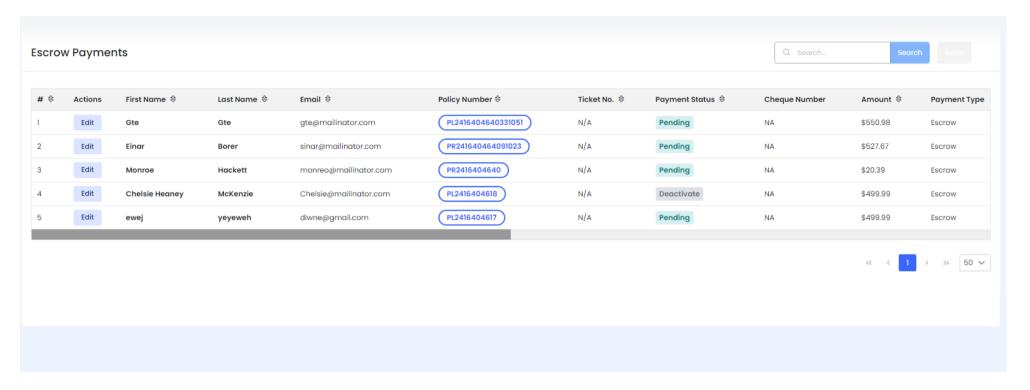
Date: Date Created

Payment Type Estimated Closing Date:

Delete Option Account: Sometimes Home Falls through and they don't purchase the plan.

<sup>\*\*</sup>Please see below revisions that are needed\*\*

## Other Sections you have aren't needed. Please remove.



#### **Audit Trail:**

Will we be having a trail on the customer profile to be able to see which agent accessed the profile and made any changes?

Below is a sample audit trail we have on our current system which shows which agent accessed the profile and what actions they made.



Format Date	<u>Login User</u> ⊖	Action
2023 11 20, 00:34:21	NightlyJob	Status Change From 30 Day Wait to Active
2023 11 19, 10:49:35	elliot	Email Sent: WelcomeLetter To: ntomcykoski@gmail.com
2023 11 19, 10:49:09	elliot	Update: status Active to 30 Day Wait propertyAddress1 13447 Zori Lane to 13449 Zori Lane
2023 11 19, 10:34:40	ricardo	Email Sent: WelcomeLetter To: ntomcykoski@gmail.com
2023 11 19, 10:34:08	ricardo	Update: mainNote ntomcykoski@gmail.com to null
2023 11 19, 10:33:45	ricardo	Update:
2023 11 01, 18:32:08	jadams	Email Sent: WelcomeLetter To: ntomcykoski@gmail.com
2023 10 27, 00:34:27	NightlyJob	Status Change From 30 Day Wait to Active
2023 10 26, 08:56:04	joey	Update: status Hold to 30 Day Wait
2023 10 26, 08:55:54	joey	Update:

1 2

#### **SEARCH BAR:**

- Remove Words "Search with ".
- Instead of Manage Customer Replace with " Customers "
- Can we have a light blue background so its more easier on the eyes.
- Larger Search button.

Manage Customer

Search With Name

Search With Email

Search With State

Search With Created On

Mail - devleam - Outlook

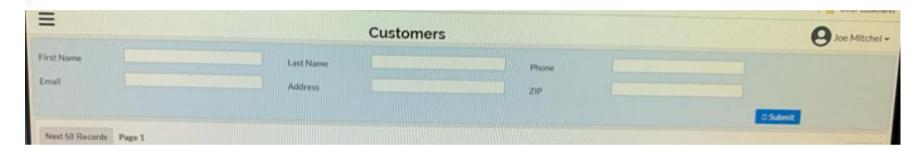
Manage Customer

Search With Mobile

Search With Mobile

Search With Address

Search With Created On

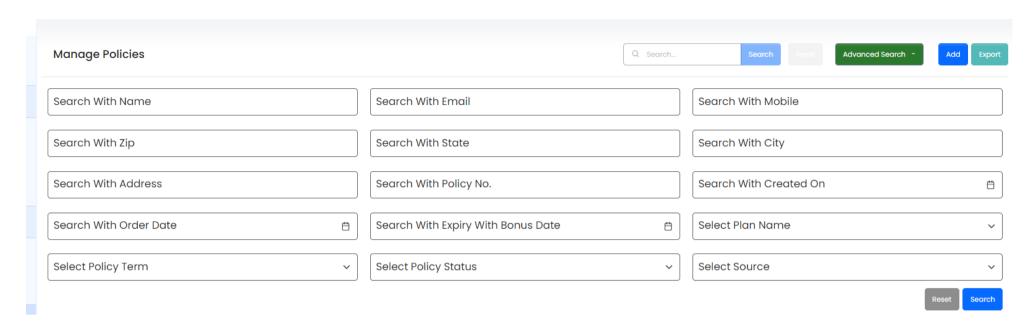


In the sales form:

**Switch Agent email address to Title Company Email Address** 

Credit Card	O Bank Account	(	Escrow	O Not Charge	
Realtor(s) Email	Address		Agent(s) E	mail Address	

Remove Search With Order Date, Expiry Date with bonus Date, Plan Name, Policy Term, Select Source.



Please Switch this section to this Format:

**Actions:** 

**Customer Name:** 

**Claim Ticket Status:** 

Replace Ticket No with CLAIM NO.

**Policy Number** 

**Product Issue** 

**Issue Details** 

**Priority** 

**Email** 

Phone

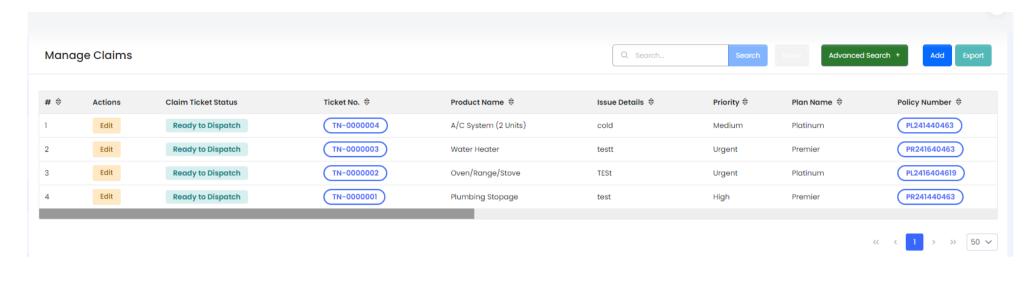
**Address** 

State

Zip

Source

#### **Created On**





Can we add a button Send Paid Receipt some customers like receiving receipts after they purchase aside from the policy.

Let me know if you have any questions.

Best, Joey

From: devteam <devteam@one41.ch>
Sent: Saturday, December 9, 2023 2:23 AM

To: Joey Sayegh <joey@firstpremierhomewarranty.com>

Cc: sarbajit@sundewsolutions.com <sarbajit@sundewsolutions.com>

Subject: Re: First Premier Home Warranty UAT Release

Hi Joey,

We will go through the email for your feedback on the Admin Portal.

For the Customer Portal Login, the team has fixed this now. Can you just try once more and see if it is working now. The credentials remain the same.

## **Customer Portal**

URL: https://techdevelopments.co/fphw-website/customer

Login: anthony@mailinator.com

Password: Nopass@123

Regards, Arny

**Dev Team** 

One41 Group GMBH

From: Joey Sayegh < joey@firstpremierhomewarranty.com>

Sent: Friday, December 8, 2023 11:11 PM

To: devteam <devteam@one41.ch>

Cc: sarbajit@sundewsolutions.com <sarbajit@sundewsolutions.com>

Subject: Re: First Premier Home Warranty UAT Release

Hi Team,

I am currently reviewing the ADMIN PORTAL and need some changes.

Regarding adding a new policy, we currently showing one address but sometimes there is a different address for billing address.

When filling out personal information it auto fills the for-property address but if billing address is different than property address what happens?

Second point:

# Manage Customer

# 💠	Actions	Name ⇔
1	View Edit	Gte Gte
2	View Edit	Einar Borer
3	View Edit	Loraine Fadel
4	View Edit	Justine Barrows barro`
5	View Edit	Albert Doc
6	View Edit	Monroe Hackett
7	View Edit	Brenden Rowe
8	View Edit	Carmela Borer
9	View Edit	Chelsie Heaney McKenzie
10	View Edit	ewej yeyeweh
11	View Edit	Bob Deti
12	View Edit	Jain Kins
13	View Edit	Luis Phillip

By customers Don't like the edit option here, can we have it just view and then the agent has option to edit the profile inside the customer profile.

# ⇔	Actions	Name ⇔	Email 🕏	Phone ⇔	Zip Code	State ⇔	Address
1	View Edit	Gte Gte	gte@mailinator.com	(444) 444-4444	12345	NEW YORK	TEST
2	View Edit	Einar Borer	sinar@mailinator.com	(655) 966-6545	12345	NEW YORK	TESt
3	View Edit	Loraine Fadel	lora@mailinator.com	(564) 564-5484	21235	MARYLAND	TEST
4	View Edit	Justine Barrows barro`	justin@mailinator.com	(265) 956-8946	12345	NEW YORK	584 Grimes Ports
5	View Edit	Albert Doc	albert@mailinator.com	(155) 154-1555	12345	NEW YORK	test
6	View Edit	Monroe Hackett	monreo@mailinator.com	(456) 565-4646	12345	NEW YORK	TEST
7	View Edit	Brenden Rowe	bren@mailinator.com	(546) 465-4845	12345	NEW YORK	18749 Kemmer Pike
8	View Edit	Carmela Borer	carmela@mailinator.com	(878) 777-9797	12345	NEW YORK	835 Swift Court
9	View Edit	Chelsie Heaney McKenzie	Chelsie@mailinator.com	(857) 879-8797	12345	NEW YORK	TEST
10	View Edit	ewej yeyeweh	diwne@gmail.com	(382) 323-8238	07764	NEW JERSEY	2340 feeow
11	View Edit	Bob Deti	bob@mailinator.com	(146) 416-4646	12345	NEW YORK	test
12	View Edit	Jain Kins	jain@mailinator.com	(453) 414-6556	12255	NEW YORK	tesdta
13	View Edit	Luis Phillip	luis@mailinatr.com	(656) 566-6446	12345	NEW YORK	test

Can we have the data information differently

Policy #

Action - Only View

Status: Either 30 Day Wait, Active, Hold (Failed Payment), Awaiting Escrow Payment, Pending Renewal, Expired, Cancelled

**Customer Name** 

Address

City

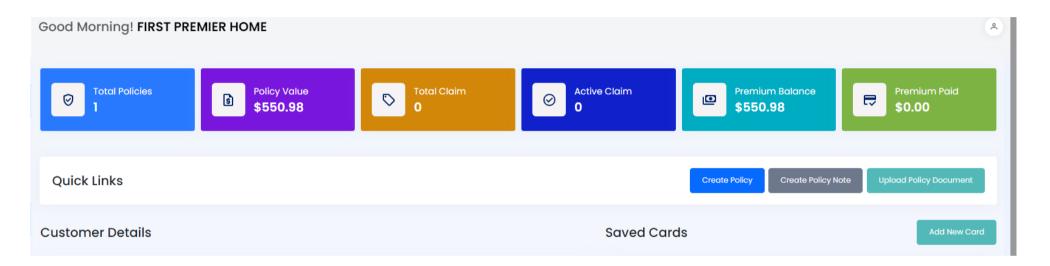
State

Sale By: Salesman User Name

**Policy Count** 

Claims

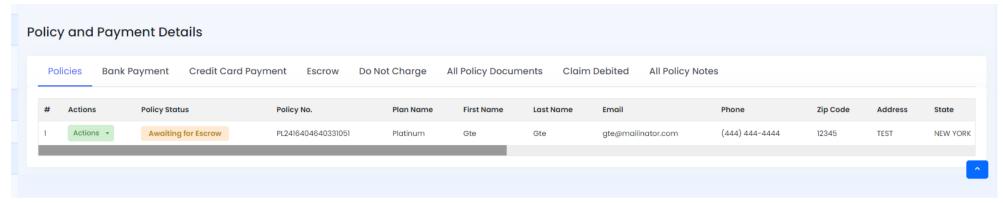
Created on: Add time stamp also Updated on: Add time stamp also



In the customer profile I have a question what is create policy mean? Add another property? Should we label that instead

Also add button for Renew Policy and it will open up sales form again for them to renew coverage.

Can we add a button to ADD Claim and lead them to form of adding a claim for this policy.

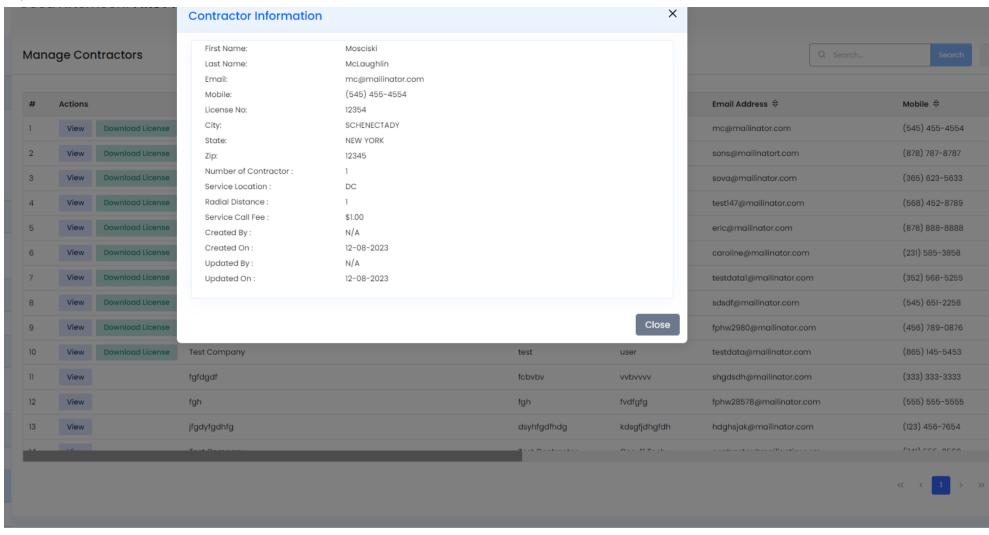


Can we have All policy notes moved right before bank payment right near policies.

## Regarding Claims:

When a claim is filled out and awaiting dispatch how will dispatch know it needs to be assigned?

For Realtors & Technicians can we have a profile established similarly to the customer profile that we have established instead of the realtor/technician's information looking like the below.



I have attached PDF OF ESCROW INVOICE the invoice if you can make us with new logo and looking more professional.

Also customer portal login isn't allowing me to login it saying invalid password.

From: devteam < devteam@one41.ch > Sent: Friday, December 8, 2023 9:54 AM

To: Joey Sayegh <joey@firstpremierhomewarranty.com>

Cc: sarbajit@sundewsolutions.com <sarbajit@sundewsolutions.com>

Subject: First Premier Home Warranty UAT Release

Hi Joey,

As discussed with you yesterday, we have provided a UAT build today.

The links and credentials remain the same as earlier. But I am putting it here for your reference:

#### Website

URL: https://techdevelopments.co/fphw-website/

## **Admin Portal**

URL: https://techdevelopments.co/fphw-admin/auth/login

Login: qafp@mailinator.com Password: F1rst@2023

## **Customer Portal**

URL: https://techdevelopments.co/fphw-website/customer

Login: anthony@mailinator.com

Password: Nopass@123

The team is currently working on the following functionalities and these are NOT included in the UAT build:

- Customer Portal
  - o File a claim
  - Edit card functionality
  - Failed Payment processed
  - Add another property
- Website
  - Making the FAQ section dynamic, so that it can be modified from the Admin Portal
- Admin Portal

- File a claim
- Making the FAQ section dynamic, so that it can be modified from the Admin Portal
- Real Estate Professional Portal

Request you to please go through the applications and let us know if you have any feedback.

Regards, Arny Dev Team One41 Group GMBH