

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.

****Please see below revisions that are needed****

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.

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

Escrow Payments

Q Search...

Search

Reset

#	Actions	First Name	Last Name	Email	Policy Number	Ticket No.	Payment Status	Cheque Number	Amount	Payment Type
1	Edit	Gte	Gte	gte@mailinator.com	PL2416404640331051	N/A	Pending	NA	\$550.98	Escrow
2	Edit	Einar	Borer	sinar@mailinator.com	PR241640464091023	N/A	Pending	NA	\$527.67	Escrow
3	Edit	Monroe	Hackett	monreo@mailinator.com	PR2416404640	N/A	Pending	NA	\$20.39	Escrow
4	Edit	Chelsie Heaney	McKenzie	Chelsie@mailinator.com	PL2416404618	N/A	Deactivate	NA	\$499.99	Escrow
5	Edit	ewej	yeyeweh	diwne@gmail.com	PL2416404617	N/A	Pending	NA	\$499.99	Escrow

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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.

Audit Trail		
Format Date	Login User	Action
2023 11 20, 00:34:21	NightlyJob	Status Change From 30 Day Wait toActive
2023 11 19, 10:49:35	elliott	Email Sent: WelcomeLetter To: ntomcykoski@gmail.com
2023 11 19, 10:49:09	elliott	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 toActive
2023 10 26, 08:56:04	joey	Update: status Hold to 30 Day Wait
2023 10 26, 08:55:54	joey	Update:

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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... Search Reset Advanced Search - Export Add Policy

Search With Name Search With Email Search With Mobile

Search With Zip Search With State Search With City

Search With Address Search With Created On

Reset Search

Customers

First Name Last Name Phone

Email Address ZIP

Submit

Next 50 Records Page 1

In the sales form:

Switch Agent email address to Title Company Email Address

☐ Credit Card ☐ Bank Account ☒ Escrow ☐ Do Not Charge

Realtor(s) Email Address Agent(s) Email Address

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

Manage Policies

<input type="text" value="Search With Name"/>	<input type="text" value="Search With Email"/>	<input type="text" value="Search With Mobile"/>
<input type="text" value="Search With Zip"/>	<input type="text" value="Search With State"/>	<input type="text" value="Search With City"/>
<input type="text" value="Search With Address"/>	<input type="text" value="Search With Policy No."/>	<input type="text" value="Search With Created On"/>
<input type="text" value="Search With Order Date"/>	<input type="text" value="Search With Expiry With Bonus Date"/>	<input type="text" value="Select Plan Name"/>
<input type="text" value="Select Policy Term"/>	<input type="text" value="Select Policy Status"/>	<input type="text" value="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

Manage Claims

Search **Reset** **Advanced Search +** **Add** **Export**

#	Actions	Claim Ticket Status	Ticket No.	Product Name	Issue Details	Priority	Plan Name	Policy Number
1	Edit	Ready to Dispatch	TN-0000004	A/C System (2 Units)	cold	Medium	Platinum	PL241440463
2	Edit	Ready to Dispatch	TN-0000003	Water Heater	testt	Urgent	Premier	PR241640463
3	Edit	Ready to Dispatch	TN-0000002	Oven/Range/Stove	TEST	Urgent	Platinum	PL2416404619
4	Edit	Ready to Dispatch	TN-0000001	Plumbing Stopage	test	High	Premier	PR241440463

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Quick Links **Create Policy** **Create Policy Note** **Upload Policy Document**

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 <joeysayegh@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


Good Morning! FIRST PREMIER HOME


 **Total Policies**
1

 **Policy Value**
\$550.98

 **Total Claim**
0

 **Active Claim**
0

 **Premium Balance**
\$550.98

 **Premium Paid**
\$0.00

Quick Links

[Create Policy](#)[Create Policy Note](#)[Upload Policy Document](#)

Customer Details

Saved Cards

[Add New Card](#)

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.

Policy and Payment Details

[Policies](#) [Bank Payment](#) [Credit Card Payment](#) [Escrow](#) [Do Not Charge](#) [All Policy Documents](#) [Claim Debited](#) [All Policy Notes](#)

#	Actions	Policy Status	Policy No.	Plan Name	First Name	Last Name	Email	Phone	Zip Code	Address	State
1	Actions	Awaiting for Escrow	PL2416404640331051	Platinum	Gte	Gte	gte@mailinator.com	(444) 444-4444	12345	TEST	NEW YORK



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.

Manage Contractors

#	Actions
1	View Download License
2	View Download License
3	View Download License
4	View Download License
5	View Download License
6	View Download License
7	View Download License
8	View Download License
9	View Download License
10	View Download License
11	View
12	View
13	View
14	View

Contractor Information

First Name:

Mosciski

Last Name:

McLaughlin

Email:

mc@mailinator.com

Mobile:

(545) 455-4554

License No:

12354

City:

SCHENECTADY

State:

NEW YORK

Zip:

12345

Number of Contractor :

1

Service Location :

DC

Radial Distance :

1

Service Call Fee :

\$1.00

Created By :

N/A

Created On :

12-08-2023

Updated By :

N/A

Updated On :

12-08-2023

Close

Search...

Email Address	Mobile
mc@mailinator.com	(545) 455-4554
sons@mailinator.com	(878) 787-8787
sova@mailinator.com	(365) 623-5633
testl47@mailinator.com	(568) 452-8789
eric@mailinator.com	(878) 888-8888
caroline@mailinator.com	(231) 585-3858
testdata1@mailinator.com	(352) 568-5255
sdsdf@mailinator.com	(545) 651-2258
fphw2980@mailinator.com	(456) 789-0876
testdata@mailinator.com	(865) 145-5453
shgdsdh@mailinator.com	(333) 333-3333
fphw28578@mailinator.com	(555) 555-5555
hdghsjak@mailinator.com	(123) 456-7654
contractor@mailinator.com	(741) 555-2525

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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
 - 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