


## Re: First Premier Home Warranty UAT Release

Joey Sayegh <joey@firstpremierhomewarranty.com>

Fri 12/8/2023 11:11 PM

To:devteam <devteam@one41.ch>

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

 3 attachments (265 KB)

p44615.pdf; Proforma-THG1648404678371257.pdf; checkout escrow.png;

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

The screenshot displays a web application interface. On the left, a 'Manage Contractors' section features a table with 14 rows. Each row has a '#', an 'Actions' column with 'View' and 'Download License' buttons, and a 'Test Company' column. A modal window titled 'Contractor Information' is open, showing details for a contractor named Mosciski, McLaughlin. The modal includes fields for First Name, Last Name, Email, Mobile, License No, City, State, Zip, Number of Contractor, Service Location, Radial Distance, Service Call Fee, Created By, Created On, Updated By, and Updated On. A 'Close' button is at the bottom right of the modal. On the right, a search bar is visible above a table with columns 'Email Address' and 'Mobile'. The table lists various email addresses and mobile numbers. At the bottom right, there are pagination controls showing '1' of 1 page.

#	Actions	Test Company
1	<a href="#">View</a> <a href="#">Download License</a>	
2	<a href="#">View</a> <a href="#">Download License</a>	
3	<a href="#">View</a> <a href="#">Download License</a>	
4	<a href="#">View</a> <a href="#">Download License</a>	
5	<a href="#">View</a> <a href="#">Download License</a>	
6	<a href="#">View</a> <a href="#">Download License</a>	
7	<a href="#">View</a> <a href="#">Download License</a>	
8	<a href="#">View</a> <a href="#">Download License</a>	
9	<a href="#">View</a> <a href="#">Download License</a>	
10	<a href="#">View</a> <a href="#">Download License</a>	Test Company
11	<a href="#">View</a>	fgfdgdf
12	<a href="#">View</a>	fgh
13	<a href="#">View</a>	jfgdyfgdhfg
14	<a href="#">View</a>	Test Company

**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](#)

Email Address	Mobile
mc@mailinator.com	(545) 455-4554
sons@mailinator.com	(878) 787-8787
sova@mailinator.com	(365) 623-5633
test147@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

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.

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**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