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    | 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            |
|      |           |                         |

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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        |
| n   | 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

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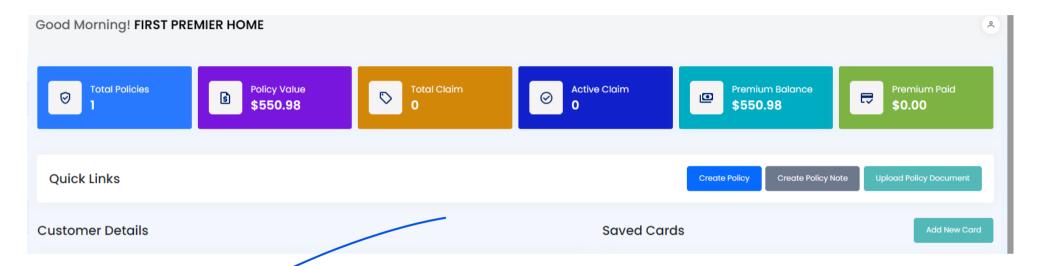
State

Sale By: Salesman User Name

**Policy Count** 

Claims

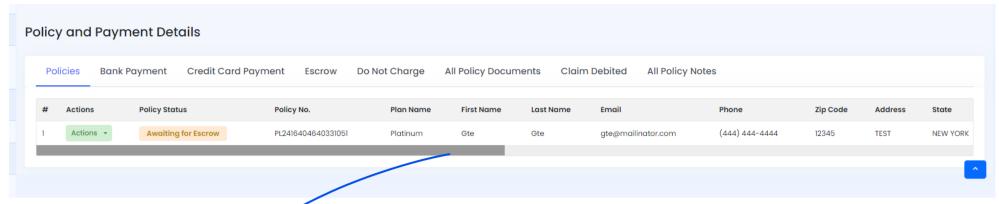
Created on: Add time stamp also Updated on: Add time stamp also



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.



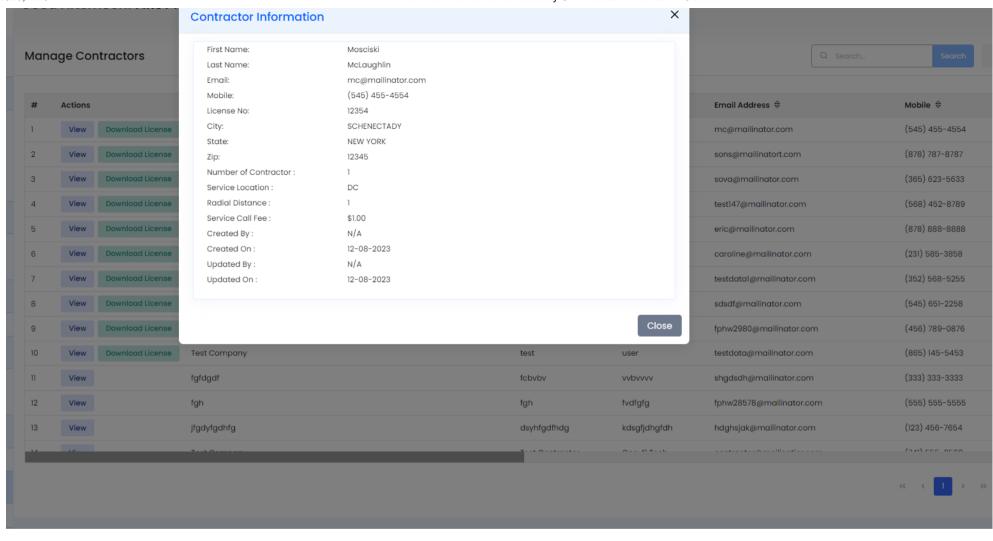
Can we have All policy notes moved right before bank payment right near policies.

## **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.

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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
  - o File a claim
  - Edit card functionality
  - o 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