

**Business Requirement Document (BRD)**

**REFERENCE NO:**

**One41 tech/**

**First Premier Home Warranty/2023/001**

Date: 06.03.2023

**Purpose and Overview**

The project aims to create an end-to-end Home Warranty application that will manage all the relevant functionalities First Premier Home Warranty maintains to run their business. The user interface will be sleek and easy to navigate for the Customers. Additionally, we will provide the First Premier Home Warranty to effortlessly add, edit, and delete multiple Policies, manage sales records, manage their technicians, sales agents, real estate agents as well as oversee customer and entire home warranty management starting from policy creation to claim processing and renewal of the policy.

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|  |  |
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**Document Version History**  
  
This will keep track of the revision and creation history for this document and once the entire document is mutually finalized, both **First Premier Home Warranty System (The Client)** and **One41 Technologies (The Developer)** must sign the same by the authorized signatories to mutually agree to the final Software Requirement and Specifications. **This document is considered as the BRD (Business Requirement Document).**All developments to the project will be based on this document and anything that is not a part of this document will be considered as Out of Scope and that should be treated as a CR (Change Request) as per SOW Agreement shared with the client while on boarding of the project.

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Prepared By | Remarks |
| 1.0 | 07-07-2023 | Business Analyst Team of One41 Tech | Based on the initial requirement documentation provided by  FPHW authority & from the meeting  Discussion outcome |
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# Table of Contents

[Table of Contents 5](#_Toc141277741)

[1. Introduction 8](#_Toc141277742)

[1.1 Purpose 8](#_Toc141277743)

[1.2 Document Conventions 8](#_Toc141277744)

[1.3 Intended Audience and Reading Suggestions 8](#_Toc141277745)

[1.4 Product Scope 8](#_Toc141277746)

[1.5 References 8](#_Toc141277747)

[2. Overview: 9](#_Toc141277748)

[2.1 Technology Details: 9](#_Toc141277749)

[2.2 System Compatibility: 10](#_Toc141277750)

[2.3 User Roles: 10](#_Toc141277751)

[2.4 Modules in the System: 11](#_Toc141277752)

[2.4.1. Web Portal - Accessible by all Visitors 11](#_Toc141277753)

[2.4.2. Web Portal - Accessible by all Customers 12](#_Toc141277754)

[2.4.3 Admin Portal- Accessible by all Claims & Dispatch-Customer Services 12](#_Toc141277755)

[2.4.4 Admin Portal- Accessible by Portal Admin & Users [Based on Access Permission] 12](#_Toc141277756)

[2.5 Service Scope 14](#_Toc141277757)

[2.5.1 Consulting & Product Strategy 14](#_Toc141277758)

[2.5.2 Development 14](#_Toc141277759)

[2.5.3 Design & User Experience 14](#_Toc141277760)

[2.5.4 Quality Assurance & Testing 14](#_Toc141277761)

[2.5.5 Technical Delivery 14](#_Toc141277762)

[2.5.6 Domain, Hosting, SMS Gateway Requirements: 14](#_Toc141277763)

[2.5.7 SMTP Configuration: 14](#_Toc141277764)

[2.6 Functional Requirements 14](#_Toc141277765)

[3. Web Portal Modules Descriptions 14](#_Toc141277766)

[3.1 Web Portal Module Descriptions (Accessible by all Visitors) 14](#_Toc141277767)

[3.1.1 Home 15](#_Toc141277768)

[3.1.2 Plans 15](#_Toc141277769)

[3.1.3 Get Your Coverage Now 17](#_Toc141277770)

[3.1.4 Contractors 19](#_Toc141277771)

[3.1.5 Real Estate Professionals 20](#_Toc141277772)

[3.1.6 Affiliates 20](#_Toc141277773)

[3.1.7 Customer Login 21](#_Toc141277774)

[3.1.8 Call for Free Quote 21](#_Toc141277775)

[3.1.9 About Us 21](#_Toc141277776)

[3.1.10 Home Warranty Plans 21](#_Toc141277777)

[3.1.11 Home Warranty 22](#_Toc141277778)

[3.1.12 Our Coverage 22](#_Toc141277779)

[3.1.13 FAQs 22](#_Toc141277780)

[3.1.14 Terms & Conditions 22](#_Toc141277781)

[3.1.15 Privacy Policy 22](#_Toc141277782)

[3.1.16 Blogs 22](#_Toc141277783)

[3.1.17 Testimonials/ Review 22](#_Toc141277784)

[3.1.18 Careers 22](#_Toc141277785)

[3.1.19 Social Media Links (Facebook, Instagram) 22](#_Toc141277786)

[3.1.20 Footer 23](#_Toc141277787)

[3.2 Web Portal Module Descriptions (Accessible by all Customers) 23](#_Toc141277788)

[3.2.1 Login (Only after Purchasing a Warranty) 23](#_Toc141277789)

[3.2.2 Forgot Password 23](#_Toc141277790)

[3.2.3 Customer Dashboard 24](#_Toc141277791)

[3.2.4 Edit Profile 24](#_Toc141277792)

[3.2.5 Change Password 24](#_Toc141277793)

[3.2.6 Billing & Payments 25](#_Toc141277794)

[3.2.7 Edit My Card 25](#_Toc141277795)

[3.2.8 Renew Policy 25](#_Toc141277796)

[3.2.9 My Policy 25](#_Toc141277797)

[3.2.10 File a Claim 26](#_Toc141277798)

[3.2.11 My Claim 26](#_Toc141277799)

[3.2.12 Refer a Friend 26](#_Toc141277800)

[3.2.13 Contact Us 26](#_Toc141277801)

[3.2.14 Logout 27](#_Toc141277802)

[4. Admin Portal Module Descriptions 27](#_Toc141277803)

[4.1 Admin Portal Module Descriptions (Accessible by all Claim & Dispatch User-Customer Care) 27](#_Toc141277804)

[4.1.1 Login 27](#_Toc141277805)

[4.1.2 Forgot Password 27](#_Toc141277806)

[4.1.3 Customer Care Dashboard 28](#_Toc141277807)

[4.1.4 Edit Profile 28](#_Toc141277808)

[4.1.5 View Customer Detail 28](#_Toc141277809)

[4.1.6 File a Claim 29](#_Toc141277810)

[4.1.7 View Service Request Detail 29](#_Toc141277811)

[4.1.8 View Policy Detail 30](#_Toc141277812)

[4.1.9 View Task to-be Assigned/ Handled 30](#_Toc141277813)

[4.1.10 Approve/Deny a Claim (L2 & L3 Agent) 30](#_Toc141277814)

[4.1.11 Assign Technician (L2 Agent) 30](#_Toc141277815)

[4.1.12 View Dispatch Detail 31](#_Toc141277816)

[4.1.13 Set Customer Availability for Appointment 31](#_Toc141277817)

[4.1.14 View Diagnostic Detail 32](#_Toc141277818)

[4.1.15 Authorize Claim Diagnosis (L2 & L3 Agent) 32](#_Toc141277819)

[4.1.16 View Tech Invoice 32](#_Toc141277820)

[4.1.17 Send Customer Email: 32](#_Toc141277821)

[4.1.18 Logout 33](#_Toc141277822)

[4.2 Admin Portal Module Descriptions (Accessible by all Admin Users) 34](#_Toc141277823)

[4.2.1 Admin Users 34](#_Toc141277824)

[4.2.2 Master Settings 37](#_Toc141277825)

[4.2.3 Content Management 41](#_Toc141277826)

[4.2.4 Human Resource Management 45](#_Toc141277827)

[4.2.5 Product Management 47](#_Toc141277828)

[4.2.6 Customer Management 50](#_Toc141277829)

[4.2.7 Policy Management 56](#_Toc141277830)

[4.2.8 Technician/ Contractor Management 60](#_Toc141277831)

[4.2.9 Real Estate Professionals Management 63](#_Toc141277832)

[4.2.10 Sales Representative Management 64](#_Toc141277833)

[4.2.11 Affiliate Management 66](#_Toc141277834)

[4.2.12 Enquiry Management 67](#_Toc141277835)

[4.2.13 Logout 67](#_Toc141277836)

[5. Other Nonfunctional Requirements 67](#_Toc141277837)

[5.1 Security Requirements 67](#_Toc141277838)

[6. Constraints 67](#_Toc141277839)

[ Time Line: 67](#_Toc141277840)

[ Resource: 67](#_Toc141277841)

[ Response time: 67](#_Toc141277842)

[7. Risks and Mitigation 68](#_Toc141277843)

[8. Assumptions 68](#_Toc141277844)

[9. Sign-Off 68](#_Toc141277845)

# Introduction

## **Purpose**

The following document outlines the functions and features that will be included in the proposed software, providing a clear understanding of the product and its capabilities. Our goal is to develop a comprehensive computerized system that efficiently manages the various modules of the integrated sales policies and takes in claims for First Premier Home Warranty System.

The purpose of this Business Requirement Document (BRD) is to lay down the specifics of input, process, and outputs required to ensure that the proposed system delivers the desired results, and the document will provide the users a clear picture of what they can expect from the software.

## **Document Conventions**

This document is formed using standard organization **(One41 Technologies)** level template for Business Requirement Document. Headings are in bold capital letters and wherever necessary, diagrams are provided as an when required.

## **Intended Audience and Reading Suggestions**

The intended audience for this document includes

* Designers, Developers and Testers from One41 Technologies.
* One41 Technologies Management Team.
* Authorized representative from First Premier Home Warranty and the stakeholders who are going to use this System.

This project is being developed under the guidance of First Premier Home Warranty (the client) by One41 Technologies representatives.

## **Product Scope**

The project aims to develop a website application responsible for the entire journey from creation of a Home Warranty policy to completion of a home warranty claim resolution.

The system will have multiple roles who will perform their designated tasks by logging into their own portal accordingly.

## **References**

List of other documents to which this BRD refers, as below-

* The shared Meeting Recordings with the stake holders and First Premier Home Warranty of this project.
* Requirement analysis and sitemap document.

# Overview:

The objective of the project is to create a web application which will connect the Home Warranty Registrations, Customers data, Lead data, Payments & Claim Process along with detail of the sales & revenues generated for the business. The main objective of the system will be to provide homeowners with financial protection and peace of mind by offering coverage for unexpected repairs and breakdowns for their major home systems and appliances due to normal wear & tear.

## **Technology Details:**

|  |  |
| --- | --- |
| The system will be developed in PHP Laravel Framework and the details are as follows: | |
| Server-Side Scripts for Admin Panel | Express JS, Node JS |
| Frontend | Angular |
| UI and UX Design | Custom Design and Development |
| Database | Postgres |
| Server & Operating System | Apache / Linux Cent Os or Ubuntu or nGinx |

## **System Compatibility:**

|  |  |
| --- | --- |
| The overall application compatibility is as follows: | |
| Website/ Relevant Portal | Back-end Admin portal |
| The front-end website will be accessible by the Visitor, customer or any user browsing through the URL.  The relevant Portal website for respective Users (Customer Portal, Realtor Agent Portal & Sales Representative Portal) will be accessible based on valid login.  The website application will be rendered properly in Desktop, hand-held devices like (Industry leading Smartphones, Tablets) | The Back-end section/ Admin portal will be accessible from desktop only. The admin section will be accessible by the respective Admin Users based on their user roles & access permissions. |

## **User Roles:**

|  |  |
| --- | --- |
| User Roles Supported within the Scope of Work | |
| Frontend | Administrative Backend |
| Visitors/ Customers/ Real Estate Agents (Realtor)/ Technician Agents/ Sales Representatives | 1. Admin Users with full control on the system  2. Sub-Admin Users with restricted controls through Access Permission Module of the Backend Administrative System (e.g.: Dispatch, Billing, Customer Care etc.) |

## **Modules in the System:**

### **2.4.1. Web Portal - Accessible by all Visitors**

|  |  |
| --- | --- |
| These following modules will be accessible by all the Visitors of the website application. | |
| Menus/ Sub menus | Homepage  Plans  Get your coverage now  Contractors  Real Estate Professionals  Affiliates  Login  Call for a Free Quote |
| Other Links | About Us  Home Warranty Plans  Home Warranty  Our Coverage  FAQs  Terms & Conditions  Privacy Policy  Blogs  Testimonials/ Review  Careers  Social Media Links (Facebook, Instagram)  Footer |

### **2.4.2. Web Portal - Accessible by all Customers**

|  |  |
| --- | --- |
| These following modules can be accessible by the Logged in Customers. | |
| Customers | Login (Only after Purchasing a Warranty)  Forgot Password  Customer Dashboard  Edit Profile  Change Password  Billing & Payments  Edit My Card  Renew Policy  My Policy  My Claim  Refer a Friend  Contact Us  Logout |

### **2.4.3 Admin Portal- Accessible by all Claims & Dispatch-Customer Services**

|  |  |
| --- | --- |
| These following modules will be accessible by the Logged in Claim & Dispatch department based on access permission. | |
| Claims & Dispatch- Customer Services | Login  Forgot Password  Customer Care Dashboard  Edit Profile  View Customer Detail  View Service Request Detail  View Policy Detail  View Task to-be Assigned/ Handled  Approve/Deny a Claim  Assign Technician (L2 Agent)  View Dispatch Detail  Set Customer Availability for Appointment  View Diagnostic Detail  Authorize Claim Diagnosis (L2 & L3 Agent)  View Tech Invoice  Send Customer Email  Logout |

### **2.4.4 Admin Portal- Accessible by Portal Admin & Users [Based on Access Permission]**

|  |  |
| --- | --- |
| These are following menu & Sub-menus which will be accessible by Back-end Admin. | |
| Admin Users | Login  Forgot Password  Admin Dashboard  Edit My Profile  Change Password  Log Out |
| Master Settings | Manage Company Info  Manage Task Status  Manage Refer Friend  Manage Email Settings  Manage Zip code  Manage Whitelist IP  Manage Referral Reward |
| Content Management | Manage Landing Pages  Manage Discounts  Manage Exit Intent  Manage Page SEO  Manage Blogs/Articles  Manage Customer Testimonials  Manage Market Leaders |
| Human Resource Management | Manage Department  Manage Admin Users  Manage Role/Department-wise Access Permissions  Manage Career |
| Product Management | Manage Coverage Plan  Manage Make/Brand  Manage Products & Add On Item  Manage Policy Term | Split Payment  Manage Property Type  Manage Property Size |
| Customer Management | Manage Customer |
| Policy Management | Manage Policies  Manage Renewals  Manage Cancellation Requests  Manage Payment History  Manage Failed Payment |
| Technician/Contractor Management | Manage Technician Network Module  Manage Claims |
| Real Estate Agent Management | Manage Real Estate Agent |
| Sales Representative Management | Manage Commissions Master  Manage Sales Report  Manage Sales Representative Commission |
| Affiliate Management | Manage Affiliates  Manage Affiliate Invoices |
| Enquiry Management | Manage Enquiry |

## **Service Scope**

The service scope for deliverables of the project includes the following:

### **Consulting & Product Strategy**

One41 Technologies will be involved with the client in the detailed strategy discussion and development of how the product needs to be visualized, developed, and placed for going live.

### **Development**

One41 Technologies will be responsible for end-to-end development of the web platform along with the responsiveness and post them to the LIVE environment.

### **Design & User Experience**

One41 Technologies will keep aligned with the UI and UX requirement of the project, once the UX design phase starts and they will confirm all the developments that are needed to be done as per the requirement specifications and will deliver the same to the client for final approval.

### **Quality Assurance & Testing**

One41 Technologies have a separate quality assurance team and we strive to check through every aspect of any application that we work on. We try and deliver a defect-free-solution to the client so that the overall quality and user experience is top notch.

### **Technical Delivery**

One41 Technologies understand the responsibility of complete technical delivery of the assigned project and will manage all design (UI/UX design only), development, testing and deployment responsibilities to help the project go live seamlessly.

### **Domain, Hosting, SMS Gateway Requirements:**

1. Domain name to be purchased by the client (if it does not exist) and the access needs to be shared with us.
2. For hosting we will need a standard hosting server, the specification is detailed below in this document.
3. Email ids will be a part of the hosting package.

**NOTE: The SMS Gateway & plan to be purchased by Client, One41 Technologies** **will incorporate the SMS Gateway over the platform, so, for any transaction, the transactional SMS will go to the relevant patients.**

### **SMTP Configuration:**

For all transactional communication along with SMS system generated email will also get triggered from the system. The Email body must be provided by the Client. The Email will be English only.

## **Functional Requirements**

The system is an integrated product with the specific modules and a common UI. The front-end modules will be available to the general and registered users as mentioned elaborately in the following sections of the document. The back-end Admin portal will be available to Admin and Admin Users with specific access permission in the Web portal.

# Web Portal Modules Descriptions

## **Web Portal Module Descriptions (Accessible by all Visitors)**

### **Home**

Once the correct URL entered by the Visitors, they will be landed on the homepage of the web application.

This page will have the following:

* Logo
* Helpline Number/ Email
* Menu/ Relevant Sub-menu (As per the Design approved by FPHW Authority)
* Login- This will have Dropdown menu for Customer, Real Estate Professionals, Contractors
* Main Banner- Image/Video [Manageable from Admin Portal dynamically]
* Form for Get a Quote
* Affiliate logos [Manageable from Admin Portal dynamically]
* Why FPHW Content along with respective CTA/Call Now section [Manageable from Admin Portal dynamically]
* Brief Plan detail thumbnail with relevant CTA
* Info related to Optional Add-ons
* Customer Reviews (Google Review)
* How FPHW works section (Graphical representation)
* Brief feature of FPHW & relevant CTAs section
* Covered States & Technicians presence.
* FAQ
* Article/Blog Thumbnail with Read More CTA [Manageable from Admin Portal dynamically]
* Strip for Get Coverage & Request a Service CTA along with Contact No
* Footer

### **Plans**

This is the page from where all the FPHW plans will be listed along with their pricing, names along with the list of Add-ons. The purpose of the page is to showcase different FPHW plans highlighting the covered items.

This page will have the following:

* Page Heading
* Page Banner (Optional)
* Plan Term [Manageable from Admin Portal dynamically]
* Plan Name [Manageable from Admin Portal dynamically]
* Plan Features/ price [Manageable from Admin Portal dynamically]
* Optional Add-on [Manageable from Admin Portal dynamically]
* Compare Coverage Details (Covered Items, Plan 1, Plan 2, Optional Add-ons along with CTA- Get a Free Quote)
* Why choose FPHW?
* FAQ
* Blog Thumbnail along with Read More option
* Contact No
* CTA like- Get Coverage | Request a Service

This page will also contain the list of items/ services part of each of the plans.

### **Get Your Coverage Now**

This is the CTA (Call to action) along with a form. This will be the beginning of order placement journey for a Website Visitor/ prospect Customer. There will be a form with very nominal inputs from the visitor to initiate the order placement process. The form will have the following fields:

* Step-1:

This will be first set of information which the system will take input from the prospects. All the field will be mandatory, without valid entry the prospect won’t be able to proceed further. System will capture the information at every single step, so in case, the prospect left in between the steps but the data will get stored in the system for future analysis & further contact.

First Name\*: Text Field

Last Name\*: Text Field

Email\*: form will get submitted against valid email only

Phone No\*: Only take USA phone no, otherwise system will show error message

CTA: Next

On clicking Next, the following Step-2will appear with a Previous option.

* Step-2:

This will be second set of information which the system will take input from the prospects. All the field will be mandatory, without valid entry the prospect won’t be able to proceed further.

Address1\*: Text Field [Google Geo Location API will be added], when the Prospect started writing address they will get suggestion, they may choose the address, or they can still fill up the data by entering the address manually

Property Address 2: Text Field

Zip code\*: When Prospect started writing zip, the list of suggested Zip will start appearing, based on selection, the respective State & City will appear Only take USA Zip, otherwise system will show error message

State: Auto-populated as per the ZIP entry/selection

City: Auto-populated as per the ZIP entry/selection

Type of Home: \* On click a dropdown option will appear, Prospect can choose from the list of items

Property Size: \* Prospect can choose from the enlisted items (respective Radio Option will be there to choose Under 5,000 sq. ft/ Above 5,000 sq. ft

CTA: Next

On clicking Next, the following Step-3 will appear with a Previous option.

* Step-3:

This will be third set of information which the system will take input from the prospects. Over here, all the plans will be displayed along with their respective coverage items as well as with the **optional** items. In this form the plan pricing option will be displayed & that will get changed based on selection of plan tenure (Monthly/Annually). Prospect can toggle between Monthly & Annually, based on the selection, the pricing will be displayed accordingly. From this form, the prospect needs to select a type of plan and the optional items (as per requirement).

CTA: Next

On clicking Next, the following Step-4/ Final Checkout step will appear with a Previous option.

* Step-4:

This will be fourth & final set of information which the system will take input from the prospects. All the field will be mandatory, without valid entry the prospect won’t be able to proceed further. Over here, Prospect will get to see the filled-up details of the previous 3 steps as well as system will ask for the following information:

Same as Property Address: Checkbox will be there for Billing Address, if the checkbox is ticked in, the respective Billing Address sections field data will be populated with property Address data.

Billing Address \*: Text Field [Google Geo Location API will be added], when the Prospect started writing address they will get suggestion, they may choose the address, or they can still fill up the data by entering the address manually

Zip\*: When Prospect started writing zip, the list of suggested Zip will start appearing, based on selection, the respective State & City will appear

State\*: Auto-populated as per the ZIP entry/selection

City\*: Auto-populated as per the ZIP entry/selection

Policy Duration to be checked from this section, based on that the pricing will be updated. Further, the payment mode will also be chosen from here, i.e., Monthly Recurring for Monthly Policies/ Annually f Yearly policies.

Coverage Details: This will show the coverage the User has selected to purchase along with the relevant price and the Optional Add-ons. The summation will also be displayed accordingly.

Choose Payment Type: \*Credit Card/ Bank/ACH/Proforma Payment

Based on selection the set of relevant fields will appear:

**Credit Card:**

Enter Card Holder Name:

Enter Card No:

Enter Expiry:

Enter CVV

\*Disclaimer will be given that the CC Detail will be channelised via 3-d secured gateway & FPHW does not store these details\*

**Bank/ACH/Proforma Payment:**

On choosing this option, the following fields will appear:

Bank:

Account No:

Routing No:

CTA: Checkout

On clicking Checkout, the system will authenticate all the details entered & based on successful validations, the order will be placed. Prospect will be landed over a Thank you/ order confirmation page. Admin, Customer will get email notifications. Customer will also get a Welcome email mentioning their Customer Dashboard link, credentials & activation link.

The Thank you page will contain the following:

Order Policy No:

Thank you Note

CTA: Home/ Browse More (To be decided during design layout creation)

Post successful order placement, the Customer will be landed on the respective Thank you/Order Confirmation page, in case of error, the system will show the respective error and the order will not be placed successfully.

**Special Note:** Once any policy got created for New Customer, the Customer data will be stored & can be further browsed through Customer Management section of the Admin Portal, whereas the Policy level information will be stored under Policy Management section & can be browsed through Admin Portal based on access permission for Admin users. Every policy will be tagged with a customer.

**For further details please see** [**Customer Management**](#_Manage_Customer) **&** [**Policy Management**](#_Manage_Policies) **section described later part of the documentation.**

Post a successful policy creation, the prospect became Customer for FPHW & will be able to access through the Customer Portal section post successful validation, activation of their profile.

On the other hand, the Policy PDF will be shared with Customer for review & acceptance. Based on acceptance, the status will be captured at the admin section of the application. PDF Shared, Accepted On, sent on date will be captured.

### **Contractors**

This will be the page for Contractors, from where the prospect Contractors will be able to get themselves registered with FPHW. This page will have the following:

* Page Header
* Page Banner [Manageable from Admin Portal dynamically]
* Register with us CTA- on click respective registration form will appear

The form will have the following fields:

* Company Name
* Contact Name
* Phone Number
* Email Address
* Mailing Address
* Zip
* State
* City
* How many Technicians do you have? - Dropdown
* What cities do you service?
* Radius Distance (in Mile)
* Service Call fee
* Choose your service items (Multiple selections is allowed)- List of Items will appear with checkbox
* License No
* CTA Register

Based on inputs and clicking on Register, the system will check the validity of the data entered. Upon validation, the form will get submitted. A success message will be displayed.

Contractor will get an acknowledgement email, whereas the admin will get email along with the data & data review requisition. Admin can see the data from the admin portal-[Contractor Management](#_Manage_Technician_Network) section.

### **Real Estate Professionals**

This will be the page for Real Estate Professionals, from where the prospect Real Estate Professionals will be able to get themselves registered with FPHW. This page will have the following:

* Page Header
* Page Banner [Manageable from Admin Portal dynamically]
* Apply to Partner CTA- on click respective registration form will appear

The form will have the following fields:

* Company Name
* Contact Name
* Phone Number
* Email Address
* Mailing Address
* Select Real Estate Account Type
* Office Details
* Zip
* State
* City
* CTA Register

Based on inputs and clicking on Register, the system will check the validity of the data entered. Upon validation, the form will get submitted. A success message will be displayed.

Real Estate Professionals will get an acknowledgement email, whereas the admin will get email along with the data & data review requisition. Admin can see the data from the admin portal-[Real Estate professionals Management](#_Manage_Real_Estate) section.

### **Affiliates**

This will be the page for Affiliates, from where the prospect Affiliates will be able to get themselves registered with FPHW. The admin can see the detail of the Affiliates as mentioned under the section of [Affiliate Management](#_Affiliate_Management).

The registration form will have the following:

* Name
* Email
* Phone No.
* Company Name
* Message
* CTA Register Now

On clicking Submit, the system will check the inputs provided by the affiliates, based on validation, the data will get submitted. The Affiliate will get an email & the Affiliate detail will be emailed to Admin. The data will be stored at the Admin Portal, based on right access permission, the data will be visible.

This page will have the following:

* Page Header
* Page Banner [Manageable from Admin Portal dynamically]
* Apply to Partner CTA- on click respective registration form will appear

### **Customer Login**

This will be the page for Customer login, from where the Customer will be able to login to their portal. Based on inputs the system will validate the inputs & based on successful validation, system will lead to the Customer to the OTP screen. Customer will get an OTP via email/SMS. On successful input of the OTP, system will validate, and Customer will be landed on their portal’s dashboard. The detail functionality is mentioned under the section of [Web Portal- Customers](#_Web_Portal_Module_2).

This page will have the following:

* Page Header
* Page Banner [Manageable from Admin Portal dynamically]
* Login Form
* Forgot Password Option
* CTA-Login

### **Call for Free Quote**

This will be the CTA which will have the respective phone no of FPHW. On click the prospect/ Visitor will be able to directly call FPHW authority for further details.

### **About Us**

This will be the page which will have the detail of the About FPHW along with its vision, mission. The content will be manageable from Admin portal section.

### **Home Warranty Plans**

This will be the section from where all the FPHW Plans will be displayed along with their prices, coverage & Add-on details. The content will be manageable from Admin portal section.

### **Home Warranty**

This will be the section from where all the FPHW details will be displayed the content will be manageable from Admin portal section.

### **Our Coverage**

This will be the section from where all the Coverage information will be displayed along with relevant details. The content will be manageable from Admin portal section.

### **FAQs**

This will be the section from where all the FPHW FAQs will be displayed. The data will be displayed as per the FAQ Category entry. The content will be manageable from Admin portal section.

### **Terms & Conditions**

This will be the section from where the FPHW Terms & Conditions will be displayed. The content will be manageable from Admin portal section.

### **Privacy Policy**

This will be the section from where the FPHW Privacy Policy will be displayed. The content will be manageable from Admin portal section.

### **Blogs**

This will be the section from where the Blog/ Article will be displayed. The content will be manageable from Admin portal section.

### **Testimonials/ Review**

This will be the section from where the Testimonials/ Reviews will be displayed. The content will be manageable from Admin portal section.

### **Careers**

This will be the section from where the prospect candidates can apply for Career. The form will have the followings:

* Name
* Email
* Phone No
* Any Experience- Yes/No
* Upload Resume
* CTA Submit

On clicking Submit, the system will check the inputs provided by the candidates, based on validation, the data will get submitted. The Candidate will get an email & the candidate detail will be emailed to Admin. The data will be stored at the Admin Portal, based on right access permission, the data will be visible.

### **Social Media Links (Facebook, Instagram)**

Over here, the social media icon will be stated. On click the respective company social media account will open.

### **Footer**

This section will appear in all the pages of the frontend section. The section will have the followings:

* Company Logo
* Home Warranty
* Home Warranty Plans
* FAQs
* Our Coverage
* About
* Request a Service
* Terms & Conditions
* Privacy Policy
* Blogs
* Plans
* Careers
* Contractors
* Real Estate professionals
* Affiliates
* Testimonials
* Blogs
* Contact Us
* Social media Links- Follow us
* Copyright Text

## **Web Portal Module Descriptions (Accessible by all Customers)**

A prospective lead can only & only convert into a customer when he/she purchases a policy with FPHW.

Once the place purchased, the Customer will get an email along with their portal URL, credentials, and important contact for FPHW.

### **Login (Only after Purchasing a Warranty)**

Post successful policy purchase, the Customer will get a welcome email along with their credentials & the login URL. Customer needs to activate their profile from the Activate button from the email itself. Now, Customer can login to their portal to access.

Over the Login page the following fields will be there:

* Email
* Password
* Forgot Password Option
* CTA Login to your account

On clicking Login to your account, the system will check the credentials & based upon validation, the Customer will be logged in to the system & will be landed over the Customer Dashboard. The detail functionality will be mentioned under [Customer Dashboard.](#_Customer_Dashboard)

### **Forgot Password**

During Login if the Customer forgot their password, they could easily reset the password by clicking on Forgot Password option. On click system will ask to input the registered email address of the Customers. If the email address entered by the Customer is incorrect, then system will show an error, otherwise, the system will shoot an email to the respective Customer for resetting their password.

The reset password email will have a CTA as RESET Password. On click a form will appear & system will ask to input the New Password & Confirm Password. If the New Password & the confirm Password did not match with each other, System will show an error, otherwise, the password will get reset. Customer will get an email. A password reset log will be generated & kept over the system for future reference.

### **Customer Dashboard**

Post successful login, Customer will be landed over the dedicated dashboard of Customers. Over here, the logged in Customer can see their data only. A Customer won’t be able to see data related to other Customers. The dashboard will have the following information:

* Welcome < Customer \_Name> | Last Activity <Date-Time>
* Billing & Payment Information- Such as Last Payment Received Amount, Date, Policy No, Upcoming Payment Amount, Date, Policy No.
* File a Claim
* My Claims- Open, In Progress, Closed
* Edit My Card
* My Policy- with status
* Add a property
* FAQs
* Update Personal Information
* Contact Us

### **Edit Profile**

This will be the area from where Customer can edit their profile information. On click the form will appear with the existing data, the data will be editable. Only the Email will be read-only. The form will be as follows:

* Primary Account Holder Information Such as:
* Name
* Mailing Address
* Phone Number
* Email Address- Read Only
* CTA Update.
* Policy Holder Information- This will show the list of Policies along with their respective Policy Holder Name

On clicking Update, based on data validation the data will get updated, in case of erroneous data the system will show error.

### **Change Password**

This will be the area from where Customer can change their password. On click the change password form will appear. The form will be as follows:

* Old Password
* New Password
* Confirm Password

CTA Update Password

On clicking Update Password, based on data validation the data will get updated a respective success message will appear. In case of erroneous data, the system will show error. Over here, if the Old Password is incorrect, the system will show error. Further, if the New Password & Confirm Password did not match, system will show an error. Once the password got updated Customer will get an email. The password log data will be updated as well.

### **Billing & Payments**

This will be the section from where the Customer will be able to track down their billing & payment related information. The section will have the followings:

* Last Payment information- Amount, Date of Payment, Transaction ID, Payment Mode- CC/Bank/ACH/Proforma Payment
* Upcoming Payment Information- with Pay Now option.
* Billing History- this will show all the billing & payment made by the Customer so far along with an Invoice download link.
* Having a Billing related query- A Billing department contact email will also be associated for quick response.

For Monthly/recurring payment Customer will get reminder from the system at a regular interval.

### **Edit My Card**

This will be the section from where the Customer can edit their Card details. For security, when the Customer edited the detail & trying to save, system will ask for an OTP. The OTP will be received to the Customer by email. Based on correct OTP input the detail will be updated, otherwise, system will show an error.

### **Renew Policy**

Policy renewal mostly will happen by the system itself. Before the Policy expiry, Policy renewal reminders along with CC payment link will be shared to Customer via email. However, failing to do so, the policy status will be updated as Expired.

Customer by logging to their portal can renew this Expired policy. Customer can only renew the policy with all the existing products and packages and for the same duration of the policy.

Based on successful payment, the Policy status will be updated to Active & the Customer will get the coverage as per the Policy Term.

### **My Policy**

This will be the section from where all the policies available under the logged in Customer will be displayed one after the another. The following Policy detail will be displayed over the grid:

* Policy Number (System generated)
* Policy Type [Monthly, Annual]
* Policy Name
* Address
* Coverage Duration
* Bonus Months (if any)
* Term Start Date
* Term-End-Date
* Plan Total
* SCF (Service Call Fee)
* Coverage Plan
* Covered Items
* Optional Services purchased (if any)
* Status [active/On-Hold/Cancelled]
* Download Policy PDF
* Download Policy Payment Invoice

### **File a Claim**

Customer can directly call the Customer Care Executive to raise a Claim against their Policies from the portal post login.

Claim can only be raised for the Active Policy.

Once the Technician has been assigned with the Claim, Customer will get notification via email.

Further, during the Tech Visit schedule Customer will get email notification and needs to share their availability for Tech Visit.

Post Tech Visit, if the issue has been released, Customer will get a system generated email for the final confirmation of the resolution for the claim. Based on feedback, the Claim will get completed from Customer’s end.

An email for Technician review will also be reached to the Customer.

All the activity date time, special notes, statuses will be captured in detail over the Admin Portal. CC Department, Admin & Admin Users who has respective access permission can see the claim details accordingly.

**Business rule:** Only ONE Claim can be in the system per Policy - validation is through address.

An account should have an “override” setting so that an admin can override this rule for a large policy and the system will allow that specific account to have more than one simultaneous claim.

### **My Claim**

This will be the section from where the Customer will be able to see all data related to Claims.

This section will have the following:

* Total Claims
* Active/Pending Claims
* Closed Claims

### **Refer a Friend**

It’s an email that is generated by the system. The customer needs to enter their email and name into form, and This gets tracked and if referral becomes a client, they get a free month. The 30-day waiting period on new signup before the free month is issued.

### **Contact Us**

There will be an online form for Customer to get in touch with FPHW executives’ category-wise.

The form will have the following:

* Name- Auto Populated
* Email- Auto Populated
* Phone No- Auto Populated
* Zip- Auto Populated
* Choose Policy-Drop down.
* Select Department- Drop down- Sales/ CC/ Billing/ Cancellations
* Message

CTA Send

Post filling up the form on clicking Send, the data will reach to the respective department’s email. An acknowledgement email will go to the Customer. This enquiry will get stored in the Admin Portal as well.

### **Logout**

Once the user clicks on the Logout option, the user will be asked for a confirmation message. If the user agrees to log out of the application on the confirmation message, they will be successfully logged out. If the user opts not to log out of the application on the confirmation message, then the user will remain active on the same page from where he/she clicked the Logout option.

# Admin Portal Module Descriptions

## **Admin Portal Module Descriptions (Accessible by all Claim & Dispatch User-Customer Care)**

### **Login**

Post successful account creation by Admin, the Customer Care Representative will get a welcome email along with their credentials & the login URL. Customer Care Representative needs to activate their profile from the Activate button from the email itself. Based on that, the Customer Care Representative can login to their portal to access.

Over the Login page the following fields will be there:

* Email
* Password
* Forgot Password Option
* CTA Login to your account

On clicking Login to your account, the system will check the credentials & based upon validation, the Customer will lead to the OTP screen & the Customer Care Representative will get an OTP via email/SMS. Once the correct OTP entered, on clicking Submit the Customer Care Representative will be logged in to the system & will be landed over the Customer Care Representative Dashboard. The detail functionality will be mentioned under [Customer Care Representative Dashboard](#_Sales_Representative_Dashboard).

### **Forgot Password**

During Login if the Customer Care Representative forgot their password, they can easily reset the password by clicking on Forgot Password option. On click system will ask to input the registered email address of the Customer Care Representative. If the email address entered by the Customer Care Representative is incorrect, then system will show an error, otherwise, the system will shoot an email to the respective Customer Care Representative for resetting their password.

The reset password email will have a CTA as RESET Password. On clicking a form will appear & system will ask to input the New Password & Confirm Password. If the New Password & Confirm Password did not match with each other, System will show an error, otherwise, the password will get reset. Sales Representative will get an email. A password reset log will be generated & kept over the system for future reference.

### **Customer Care Dashboard**

Post successful login, Customer Care Representative will be landed over the dedicated dashboard of Customer Care Representative. The dashboard will have the following information:

* Welcome < Customer Care Representative \_Name> | Last Activity <Date-Time>
* Total Claims | In Progress Claims | Pending Claims | Completed Claims
* Diagnosis Report Pending for Approval
* Policy Cancellation Request(s) (Retention Dashboard)
* [Work Order Assigned | To be Assigned](#_View_Task_to-be)
* Policy Renewal
* Total Technicians | Available Technicians | Unavailable Technicians

### **Edit Profile**

This will be the area from where Customer Care Representative can edit their profile information. On click the form will appear with the existing data, the data will be editable. Only the Email will be read-only. The form will be as follows:

* First Name
* Last Name
* Phone
* Email- Read-only
* Department
* Office Location
* Profile Image
* Status -Active/ Inactive
* CTA Update.

On clicking Update, based on data validation the data will get updated, in case of erroneous data the system will show error.

### **View Customer Detail**

This will be the area from where Customer Care Representative can see and update Customer, Policy & Claim related information. On click the data will appear with the existing data, the data will be editable. The view will be as follows:

* First Name
* Last Name
* Phone
* Email
* Profile Image
* Card Information
* [Policy Information](#_View_Policy_Detail)
* [All Claim related to that Customer](#_View_Service_Request)
* Logs for Claim
* Logs for Policy creation
* Logs for Payment
* Pending Payment/ Upcoming Payment information
* Bank/ACH/Proforma Payment details
* CTA View | Update

Based on data input for Update, system will verify the data & based on review, System will update the data, otherwise, system will show an error.

### **File a Claim**

To start a claim, over the call the Customer must state the following detail, this form will be filled up by the Customer Care Executive:

* Select Policy
* Select Faulty Device/unit- Dropdown \* only covered/Add-on items as part of Policy purchase will be displayed.
* Related Information- set of question and relevant answers to be chosen – the Question-answers will appear as part of the Admin Portal entries & as per the selected unit.
* SCF will be displayed.
* Remarks- Text field- the reason for claim will be captured here as a note.

CTA Checkout

\*\* If 30 days wait is waived then relevant message will be displayed during file a claim.

Based on successful payment the claim will be raised. Customer will get an email. CC Department will also get an email. The claim will be displayed in the CC Department dashboard as well. The claim status will be Pending Review.

### **View Service Request Detail**

This will be the area from where Customer Care Representative can see the detail of the Service Request along with their related information and latest status. Based on access permission, Customer Care Representative can update the status as the service request processed. The view will be as follows:

* Service Request ID/ Claim ID
* Respected Policy No
* Requester Name
* Premium Amount
* Claim Category/ Covered Item
* Assigned To
* Request Logged on Date
* Days Ticket Open
* Notes
* Claim Details
* Claim Status
* CTA View | Assign Contractor | Update

Further, on the detail of a Claim the following detail will be showcased:

* Policy Details
* Registered Appliances
* Claim Cost
* Replacement/Repair details
* Contractor Assignment
* Diagnostic Report Review
* Send Quote to Customer
* Claim Payout Request
* View/ Create/ Send Invoice
* Upload/View Related documents
* Upload/View Notes
* Track Policy Status History
* Send Emails to Customer
* CTA Update

Based on data input for Update, system will verify the data & based on review, System will update the data, otherwise, system will show an error.

### **View Policy Detail**

This will be the area from where Customer Care Representative can see the policy detail. Based on access permission, Customer Care Representative can see the policy detail. The view will be as follows:

* Customer Name
* Email
* Phone
* Policy No
* Policy Amount
* Total Premium Paid
* Street Address
* City
* State
* Zip
* Purchase Date
* Effective Date
* Expiry with Bonus Month (if any)
* Days Remaining
* Download Policy PDF

### **View Task to-be Assigned/ Handled**

This will be the area from where Customer Care Representative can see the list of Service Request which are pending to for review. Based on review of the request they can approve/ reject. Further, for approve requests they can assign Contractor for the service request to process.

* Customer Name
* Email
* Phone

### **Approve/Deny a Claim (L2 & L3 Agent)**

This will be the area from where the Customer Care Representative will see the claim detail & decide to approve/ reject. On approval, the status of the claim will be updated & further ready for Contractor assignment, otherwise, if the request is rejected, Customer Care Representative must input a cancellation reason & update the status of the Claim. On rejection, Customer will receive an email intimation along with the claim detail, cancellation reasons.

### **Assign Technician (L2 Agent)**

This will be the area from where the Customer Care Representative can assign the Technician/Contractor. This can be done based on the access permission. Only Contractors who marked their availability as Available, those Contractors can be assigned with the work order. Contractors who marked them as Unavailable won’t get any work order assignments.

When any Work Order is assigned to the Contractor, the Contractor will get the respective email notification. If the Contractor rejected the assignment, the Customer Care Representative can reassign the job to another contractor. The work order shifting will be logged accordingly. The following information will be displayed while assigning a Contractor:

* Technician Company Name
* Distance to Customer
* Active Jobs
* Total Jobs
* Completed Jobs
* Email
* Phone
* City
* State
* Zip
* Contractor SCF
* View Work History
* Notes

There will be option to choose to which Contractor the work order will be assigned.

CTA Assign Work Order Directly | Send Service Request

### **View Dispatch Detail**

This will be the area from where the Customer Care Representative can see the dispatch detail. Based on access permission, the Customer Care Representative will see the follows:

* Technician Company Name
* Email
* Phone
* City
* State
* Zip
* Address
* Diagnostic Fee(s)
* Dispatch Type – Diagnostic/ Installation/ Repair/ Replacement
* Assigned On
* Updated On
* View/ Download Work Order

### **Set Customer Availability for Appointment**

In order schedule the Contractor Visit/ repair/replacement Customer Care Representative will set the Customer availability. On click a Calendar will open based on the discussion the Customer Care Representative will mark the available timing slots for the Customer. Otherwise, Customer will get an email along with a calendar link. Once the Customer filled up their availability the respective Contractor will get an email, they may agree to the availability of the Customer, otherwise, they may ask for another slot, depending on the mutual confirmation, the Tech Visit will be scheduled. All these information will be logged against the claim as Claim Note. The claim note can be accessible by the Admin/ CC department as per access permissions.

### **View Diagnostic Detail**

Post-inspection the Contractor will email the diagnostic detail. In that case, the respective Customer Care Representative will upload the diagnostic detail and review it. The status will be updated accordingly.

### **Authorize Claim Diagnosis (L2 & L3 Agent)**

Post Diagnostic detail availability, the Customer Care Representative will review the detail. If the Customer Care Representative requires further information to approve the diagnostic, they will get in touch with the Contractor to source the additional data and can update the diagnostic detail and approve the same.

Based on Customer feedback, the claim status will be updated as “Complete” and the Claim notes will be updated accordingly.

### **View Tech Invoice**

Post inspection or repair/replacement when the Contractor shared the invoice via email and the same will be visible to the Customer Care Representative. For a single service request/ claim there might have multiple invoices E.g., Initial SCF, Repair/Replacement). The invoice can be downloadable & can share with the Customer by the Customer Care Representative as per requirement from time to time.

### **Send Customer Email:**

There will be a section from where the Customer Care Representative can send emails to the respective Customer as per the requirement from time to time.

The form will be as follows:

Customer email- auto populated

CTA- Send now

Based on valid inputs, the system will verify & ask for confirmation before sending the email to the Customer. Otherwise, the system will show an error & no email will be triggered.

### **Logout**

Once the user clicks on the Logout option, the user will be asked for a confirmation message. If the user agrees to log out of the application on the confirmation message, they will be successfully logged out. If the user opts not to log out of the application on the confirmation message, then the user will remain active on the same page from where he/she clicked the Logout option.

## **Admin Portal Module Descriptions (Accessible by all Admin Users)**

### **Admin Users**

#### Login

This is the form from where the FPHW Admin can log in to the CMS by providing their respective email & password. They can land on a separate section based on the correct credentials provided. In case of invalid certificates, the system will show an error. The user will be redirected to the account profile.

The CMS form fields will be specified as below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Email\* | Text Box | [ad@abcd.com](mailto:ad@abcd.com) | Varchar |
| Password\* | Text Box | \*\*\*\*\*\*\* | Varchar |
| Remember  Me | Check Box |  | 1 would be true  (checked). 0 would be false  (Unchecked). |
| OTP | Text Box | \*\*\*\* | Int |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Login | Cancel | | | |

After filling out the login form and clicking on ‘Login’, an email will be triggered to the CMS Admin-User with an OTP (valid for the next specified mins), which they would need to input in the ‘OTP’ field. In case they do not receive any OTP, they can click on ‘Resend OTP’ to receive the same. Once they have inputted the correct OTP, they would be able to log in. Else, the system will show an error.

OTP will be 4 characters unique numeric value.

Note: On entering 3 consecutive incorrect email/ password, the profile will be locked & can ONLY be active by the Admin.

As a security reason, every password will expire in 90 days. Post 90 days of password change if the password not changed, on login, System would ask the User to change their password & on doing so, they will be able to login to the system. Post login, the Admin must Clock-in to system, a popup will appear to Clock-in.

#### Forgot Password

This module will help registered Admin users/ Admin retrieve their passwords in case they forget them. In case of invalid credentials, the system will show an error else. The user will receive a mail containing their password in their registered email id. The form fields will be specified as below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Email\* | Text Box | [ad@abcd.com](mailto:ad@abcd.com) | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Forgot | Cancel | | | |

After filling out the form and clicking on ‘Submit, an email will be triggered to the respective user along with a forgotten password link. From the link, the respective User can reset their password. Post successful reset of the password, the system will ask the user to log in.

#### Admin Dashboard

Post successful login, Admin Users will be landed on this dashboard section. Over the dashboard, multiple data will be showcased in graphical representation as well as with their latest statistics. Dashboard data can be further filtered with date range. The dashboard will have the following:

* Total Customer- On click it will redirect to the Customer Management area.
* Total Sales Representative- Clicking it will redirect to the Sales Representative Management area.
* Total Technicians- On click it will redirect to the Technician Management area.
* Total Revenue
* Total Schedule Payment
* Total Bank/ACH/Proforma Payment Amount
* Total Real Estate Agents
* Total Affiliates
* Total Policies | Active Policies | Expired Policies | Cancelled Policies
* Total Service Request | Active Request | Pending Request | Completed Requests | Cancelled Requests

Further, the dashboard will display:

* Revenue Graph for Last 30 days- with filter of Daily/Weekly/Monthly/Quarterly, export option will be there as well.
* Service Request for Last 30 days- with filter of Daily/Weekly/Monthly/Quarterly & with Ticket status- Active/Pending/Completed, Export option will be there as well & option to navigate to view all Claims section.
* Total State-wise Sales Report & Revenue- Daily/Weekly/Monthly/Quarterly, export option will be there as well.
* Sales Representative vs Sales- Daily/ Weekly/Monthly/Quarterly with export option & option to navigate to [Sales Report](#_Manage_Sales_Report) section.

#### Edit My Profile

This will be the section from where the Admin User can edit their profile information. Email will be read-only. The form will be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Name\* | Auto Populate | John Doe | Varchar |
| Email Id (Official)\* (Read-only) | Auto Populate | j.doe@abc.com | Varchar |
| Location\* (Where Admin stays) | Auto Populate | USA | Varchar |
| Address Line 1\* | Auto Populate | Abcde | Varchar |
| Address Line 2 | Auto Populate | XYZ | Varchar |
| Zip Code\* | Text Box | 12345 | Varchar |
| State/Province\* | Auto Populate | USA | Varchar |
| Mobile Number\* | Auto Populate | +1-742-628-0765 | Varchar |
| Other Contact Number | Auto Populate | +1-718-628-0755 | Varchar |
| Department Name\* (Read-only) | Auto Populate | Dispatch | Varchar |
| System User Role\* (Read-only) | Auto Populate | Portal Admin | Varchar |
| Image | Auto Populate | UserImg.jpg | Varchar |
| Joining Date\* (non-editable) | Auto Populate | MM-DD-YYYY | Varchar |
| Registered On\* (non-editable) | Auto Populate | MM-DD-YYYY | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit I Cancel | | | |

#### Change Password

The User can change their password. In case of invalid credentials, the system will show an error, else password will be updated, and a new password will be in place. As per the industry's best practices, the password must follow the following:

- 8-12 characters long

- At least contain one CAPITAL letter

- At least contain one small letter

- At least contain one number

- At least contain one unique character

- No spaces are allowed

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Old Password\* | Text Box | [\*\*\*\*\*\*\*\*](mailto:ad@abcd.com) | Varchar |
| New Password\* | Text Box | [\*\*\*\*\*\*\*\*](mailto:ad@abcd.com) | Varchar |
| Confirm Password\* | Text Box | [\*\*\*\*\*\*\*\*](mailto:ad@abcd.com) | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

After filling out the form & clicking on ‘Submit’, & system will check the password validity as per the industry best practices. In case of an error, the system will show an error. Else the password will be saved successfully & the respective User will receive an email notification accordingly.

#### Log Out

Once the user clicks on the Logout option, the user will be asked for a confirmation message. If the user agrees to log out of the application on the confirmation message, they will be successfully logged out. If the user opts not to log out of the application on the confirmation message, then the user will remain active on the same page from where he/she clicked the Logout option.

### **Master Settings**

#### Manage Company Info

This will be the section from where the admin will be able to manage the company-related information as and when required. This section of the system will have the functionality like add/edit/view as per the access permission enabled for the respective logged in user.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Company Name\* | Text Box | FPHW | Varchar |
| Phone No.\* | Text Box | (714) 899-9922  (786) 123-9922 | Varchar |
| Contact Email\* | Text Box | [support@fphw.com](mailto:support@fphw.com) | Varchar |
| Address 1\* | Text Box | 123, Tesla Road | Varchar |
| Address 2 | Text Box | Near Madison Garden | Varchar |
| Zip code\* | Drop down | 12345 | Varchar |
| State | Auto populate | New York | Varchar |
| City | Auto populate | New York | Varchar |
| Company Logo\* | File Upload | Logo.jpg | Varchar |
| Social Media Icons 1\*  (Add More Option) | File Upload | Insta.jpg | Varchar |
| Social Media Links 1\* | Drop down | Instagram | Varchar |
|  | | | +Add More |
| Social Media Icons 2\*  (Add More Option) | File Upload | Twitter.jpg | Varchar |
| Social Media Links 2\* | Drop down | Twitter | Varchar |
| Accepted Payment Method Icon\*  (Add More Option) | File Upload | Mastercard/Discovery/VISA/  AMEX/Apple Pay | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Task Status

This will be the section from where the admin will be able to control each status which is to be displayed to the Customer and to the internal Customer Care Department. These task statuses will be impacted during the claim processing. The status shown to Customer and the internal status for better tracking will be entered and configured from this section.

The fields that allow searching, sorting, and filtering are marked as Se, So, and Fi, respectively.

This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Task Status\* (Se/Fi) | Text Box | Ready to Dispatch | Varchar |
| Customer Task Status\* (Se/So) | Text Box | Awaiting Assignment | Varchar |
| Task Details (Se/So) | Text Box | We are actively sourcing a technician to  assign to this job | Varchar |
| Colour Code (Se/So) | Hex code/ Colour Picker | #5e6f62 | Varchar |
| Status\* (Se/So/Fi) | Radio | Active/ Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Refer Friend

This will be the section from where the admin will be able to see the reference, a friend request email, and relevant details.

The fields that allow searching, sorting, and filtering are marked as Se, So, and Fi, respectively.

This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Customer Name (Se/Fi) | Text Box | John Doe | Varchar |
| Email (Se/So) | Text Box | j.doe@gmail.com | Varchar |
| Phone No (Se/So) | Text Box | (714) 676-9988 | Varchar |
| Policy No (Se/So) | Text Box | Xxxxxx787678 | Varchar |
| Policy Status (Se/So/Fi) | Text Box | Active/ On Hold/ Expired/  Cancelled | Varchar |
| Friend Email (Se/So) | Text Box | [jane@gmail.com](mailto:jane@gmail.com) | Varchar |
| Friend Name (Se/So) | Text Box | Jane Doe | Varchar |
| Referred On (Se/So) | Text Box | MM-DD-YYYY | Varchar |
| Friend Policy No (Se/So) | Text Box | Xxzzzxxzz76576687 | Varchar |
| Friend Policy Status (Se/So/Fi) | Text Box | Active/ On Hold/ Expired/  Cancelled | Varchar |
| Eligible for Reward (Se/So/Fi) | Text Box | Yes/No | Varchar |
| Reward (Se/So) | Text Box | 2 Months Leak Proof free | Varchar |
| Reward Status (Se/So/Fi) | Text Box | Redeemed/ Expired | Varchar |
| Redeemed/ Expired On | Text Box | MM-DD-YYYY | Varchar |

Business Rule: The reward will only be issued to the referee if the referral signed up and purchased a policy, further, there will be a waiting period of 30 days for policy activation.

#### Manage Email Settings

This will be the section from where the admin will set the emails, who will get the email under what circumstances. Further, whether the email will be CC’ed to someone or not will also be configurable from this section.

The fields that allow searching, sorting, and filtering are marked as Se, So, and Fi, respectively.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Email Type\*(Se/Fi) | Dropdown | Success/Fail | Varchar |
| Email Section\*(Se/Fi) | Text Box | [Payment](mailto:ad@abcd.com) Receipt/  Order Placed/  Claim Requested | Varchar |
| Email From \*(So) | Text Box | [noreply@fphw.com](mailto:noreply@fphw.com) | Varchar |
| Email To\* (So)-Multiple entry | Text Box | [service@fphw.com](mailto:service@fphw.com) | Varchar |
| Email CC\*(So)-Multiple entry | Text Box | [customercare1@fphw.com/](mailto:customercare1@fphw.com/)  [customersupport@fphw.com](mailto:customersupport@fphw.com) | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Login | Cancel | | | |

#### Manage Zip code

This will be the section from where the admin will set the serviceable zip code(s) where FPHW provided their services. Based on these entries, over the front-end part of the application, Visitor searched to buy a policy or existing Customer tried to raise a claim, these zip codes will be populated when searched. If any zip code is not listed & prospect tried to put that in that case, system will save the data of the prospects and will show a message like “This zip code is not serviceable yet”.

Based on these entries, the respective Sales Tax Surcharge will be applicable on the final Total Amount of the policy which is to be paid by the Customer. Over here, Combined Rate will be calculated as a summation of various rates as applicable & will impact the overall Policy Order value as Surcharge/ Sales Tax as applicable.

This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The fields that allow searching, sorting, and filtering are marked as Se, So, and Fi, respectively.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Zip Code\*(Se/Fi) | Dropdown | 12345 | Varchar |
| State\*(Se/Fi) | Drop down | New York | Varchar |
| State Code\*(Se/Fi) | Text Box | NY | Varchar |
| City \*(Se/Fi) | Drop down | New York | Varchar |
| State Rate (So) | Text Box | 0.0040 | Varchar |
| County Rate (So) | Text Box | 0.0000 | Varchar |
| City Rate (So) | Text Box | 0.0020 | Varchar |
| Special Rate (So) | Text Box | 0.0040 | Varchar |
| Combined Rate | Text Box | 0.01 | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Whitelist IP

This will be the section from where the admin will set up Trusted IP, so when User tried to login from those Ips, system would not ask for any OTP or further validations. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Office Name\* | Dropdown | USA Office | Varchar |
| Whitelist IP\* | Text Box | 24.45.122.122 | Varchar |
| Added By\* | Text Box | Mr. John Doe | Varchar |
| Updated By | Text Box | M/s. Jane Doe | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Referral Reward

This will be the section from where the admin will set up the Referral reward. This referral reward will be applied to the referee when his/her friend purchased a policy and after 30 days of signing up the reward will be awarded to the referee. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Reward Name\* | Text Box | Refer a Friend  Free Coverage | Varchar |
| Gift/Discount\* | Text Box | Get 1-month free leak proof coverage | Varchar |
| Policy Purchased by Friend\* | Drop down | Platinum/ Basic | Varchar |
| Policy Duration\* | Drop down | Yearly/Monthly | Varchar |
| Added By\* | Text Box | Mr. John Doe | Varchar |
| Status | Dropdown | Active/Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

Over here, as per the business requirement FPHW can set up multiple types of Referral reward even this can be further categorized as per the policy type purchased by the friend, the gift value might get upgraded as well. The final decision to be decided by the FPHW business on this one, how the referral reward needs to be set up.

### **Content Management**

#### Manage Landing Pages

This will be the section from where the admin will manage the contents of the landing pages. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Landing Page Name\* | Drop down | Bestwarrantypage | Varchar |
| Image\* | File Upload | File1.jpg | Varchar |
| Banner Text/Title\* (Se/So) | Text Box | Test Title | Varchar |
| Banner Description | Text Area | Test Description | Text |
| Page Content | CK Editor | This is lorem ipsum | Varchar |
| Action URL (Se/So) | Text Box | [/best-warranty-1](http://www.abc.com) | Varchar |
| Status\* (Se/So) | Radio | Active/ Inactive | Varchar |
| Meta Keyword\* | Text Box | This is a meta keyword | Varchar |
| Meta Description \* | Text Box | This is a meta description | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Discounts

This will be the section from where the admin will manage all the discounts which will be showcased on the website application. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. Over here, if the Ends On date did not mention the discount will be on forever, until any ends on date mentioned. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Funnel Name\* (Se/So/Fi) | Drop down | Website/ Landing Page | Varchar |
| Plan Name\*(Se/So/Fi) | Drop down | Basic Plan/ Premiere Plan | Varchar |
| Plan Type\*(Se/So) | Drop down | Monthly/Yearly | Varchar |
| State\*(Se/So) | Drop down | New York | Varchar |
| Discount Amount\* | Text Box | 20% | Varchar |
| Bonus Month\* | Text Box | +2 months free | Varchar |
| Service Fee\* | Text Box | USD 80 | Varchar |
| Surcharge % | Text Box | 10 | Varchar |
| Starts From\*(Se) | Date Field | MM-DD-YYYY | Varchar |
| Ends On | Date Field | MM-DD-YYYY | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Exit Intent

This will be the section from where the admin will manage the exit intent content for the website application. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Page Name\*(Se/So) | Drop down | Website/Landing Page | Varchar |
| Exit Intent Image\* | File Upload | ee.jpg | Varchar |
| Description\* | CK Editor | $200 Of  +2 free bonus months  + Pool coverage  Get your coverage now! | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Page SEO

This will be the section from where the admin will manage the SEO contents for the pages of the website application. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Page Name\* (Se/So) | Drop down | Homepage/ Contact Us | Varchar |
| Meta Description\* | Text Box | This is test Meta description | Varchar |
| Meta Keyword\* | Text Box | This is meta keyword area | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Blogs/Articles

This will be the section from where the admin will manage the Blog/Article contents for the pages of the website application. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Title\* (Se/So) | Text Box | This is a test blog | Varchar |
| Blog Type\* | Text Box | HOME WARRANTY | Varchar |
| Blog URL\* | Text Box | /what\_is\_home\_warranty | Varchar |
| Author Name\* | Text Box | John Doe | Varchar |
| Author Image | File Upload | Author.jpg | Varchar |
| Blog Image\* | File Upload | Blog.jpg | Varchar |
| Blog Mobile Image\* | File Upload | Blog\_mobile.jpg | Varchar |
| Publish Date\* | Date Field | MM-DD-YYYY | Varchar |
| Short Description\* | CK Editor | This is a short description  which to be displayed over  the Blog thumbnail on the  blog listing page | Varchar |
| Description\* | CK Editor | This is main content  description of the blog | Varchar |
| Meta Title\* | Text Box | This is a Test meta-Title | Varchar |
| Meta Keyword\* | Text Box | This is a meta keyword | Varchar |
| Meta Description\* | Text Box | This is a test meta  description | Varchar |
| Status\* | Radio Button | Active/Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Customer Testimonials

This will be the section from where the admin will manage the Customer Testimonials. contents for the pages of the website application. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. The Testimonials will have relevant sequence and it will be auto incremental, if the admin is willing to change the sequence, they can do that manually. If any 2 testimonials have the same sequence, the system will show alert, but the data will be updated. The latest updated testimonial will appear before the previous one.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Customer Name\* (Se/So) | Text Box | John Doe | Varchar |
| Customer Image | File Upload | custImage.jpg | Varchar |
| Posted To\* | Text Box | Google | Varchar |
| Testimonial\* | CK Editor | FPHW is awesome | Varchar |
| Sequence\* | Text Box | Auto incremental | Varchar |
| Status\* | Radio Button | Active/Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Market Leaders

This will be the section from where the admin will manage the logos & sequence of the Market leaders which will appear on the website application. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Company Name \* (Se/So) | Text Box | Google | Varchar |
| Logo\* | File Upload | Google.jpg | Varchar |
| Sequence\* | Text Box | 1 | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

### **Human Resource Management**

#### Manage Department

This will be the form from where the admin can set access to modules & sub-modules for the Admin/Users. Based on the access permission given the respective User will be able to access the admin portal. Admin can set View/Add/Edit/Delete access for the other Users/Departments. When any Department is being created, the department-wise default access permissions will be set.

The form will be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Department Name\*(Se/So/Fi) | Text Box | Claim/Dispatch/Customer Care/  Billing etc. | Varchar |
| Access Permission\* | Checkbox | Manage Customer/ Manage Sales Representative etc. Module &  Sub-module | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit I Cancel | | | |

#### Manage Users

This will be the section from where the admin can create new Admin/ Admin Users/Sales Representatives. Email will be read-only.

The fields that allow searching, sorting, and filtering are marked as Se, So, and Fi, respectively.

The form field will be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Name\* | Text Field | John Doe | Varchar |
| Email Id (Official)\* (Se/So) | Text Field | j.doe@abc.com | Varchar |
| User ID/ Agent ID | Text Field | FP-009189 | Varchar |
| Location\* (Where Admin stays) | Text Field | USA | Varchar |
| Address Line 1\* | Text Field | Abcde | Varchar |
| Address Line 2 | Text Field | XYZ | Varchar |
| Zip Code\* | Text Field | 12345 | Varchar |
| State/Province\* | Text Field | USA | Varchar |
| Mobile Number\* | Text Field | +1-742-628-0765 | Varchar |
| Other Contact Number | Text Field | +1-718-628-0755 | Varchar |
| Department Name\* (Se/So/Fi) | Text Field | Dispatch/ Billing &  Payment/ Claim/  Customer Care/  Retention etc. | Varchar |
| System User Role\*(Se/So/Fi) | Drop Down | Admin/ User/  Representative/Sales Representatives/L1/  L2/ L3 etc. | Varchar |
| Image\* | Image Field - Browse | UserImg.jpg | Varchar |
| Password | Text Box | \*\*\*\*\*\*\*\*\* | Varchar |
| Joining Date\* (Se/So) | Calendar | MM-DD-YYYY | Varchar |
| Registered On\* (Se/So) | Calendar | MM-DD-YYYY | Varchar |
| Status\*(Se/So/Fi) | Drop Dwon | Active/ Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit I Cancel | | | |

Based on inputs, the system will validate the data, based on verification, the form will get submitted, & the User will be created. Otherwise, System will show error. On account creation, users will get a welcome email to activate their account along with access credentials. Based on activation, User will be able to access their portal. Admin can set up the password of the Users or at any point of time can change the password for any User as well.

\*\* Password field edit option will be managed from the access permission area.

Note: If any Users profile is marked Inactive, then they cannot access the system further until it’s marked Active by the Admin.

This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

#### Manage Role/Department-wise Access Permissions

This will be the form from where the admin can set access to modules & sub-modules for the Admin/Users. Based on the access permission given the respective User will be able to access the admin portal. Admin can set View/Add/Edit/Delete access for the other Users/Departments.

In case the access had been set against the Department in that case, Users tagged with that department will get only those specific access that had been tagged along with the department.

For e.g., Admin set access permission for Claim Management (View Only) at the Department level (Suppose Claim & Dispatch Department). Now. Mr. John Doe is a User of the Claim Department will automatically get the access for Claim management (View) as the access permission has been created at Department level.

Now, if Admin wants to certain *extra* access permission out of the department in that case, Admin needs to search for the user & set the *extra* set of access to that relevant User (In this case to Mr. John Doe). Suppose, Admin set special permission to see Customer detail (View).

When Mr. John Doe logged in to the admin portal, he will see Claim management (View Only) along with Customer Management (View Only). No other modules/sub-modules will be accessible for Mr. John Doe.

Over here, by default the detail will be visible for User Role, further there will be Radio buttons like- User Role, Department, Users, Show All.

On selection, the respective set of data will be visible.

The form will be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| User Role\*(Se/So/Fi) | Drop down | Admin/ User | Varchar |
| Department\* (Se/So/Fi) | Drop down | Claim/Retention/Dispatch/Billing | Varchar |
| User Name | Text Field | Mr. John Doe | Varchar |
| Module Name \* (Multi-selection) | Drop down | Claim | Varchar |
| Sub Module Name \* (Multi-selection) | Drop down | Manage Claims | Varchar |
| Access Type\* (Multi-selection) | Check Box (Add/Edit/  View/Delete/Export) | Multiple Selection | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit I Cancel | | | |

#### Manage Career

This will be the section from where the admin will manage all the career enquiries posted over the system. Once the career request has been submitted by the Candidate, they will get an acknowledgement email as well as the respective Admin will get an email with the candidate details. The same data can be visible from this section. This section of the system will have functionality like view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination. There will be a section from where Admin can download all the CVs of the candidate.

The form will have the following:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Candidate Name (Se/So) | John Doe | Varchar |
| Email | [Jane.doe@gmail.com](mailto:Jane.doe@gmail.com) | Varchar |
| Phone No. | (714) 876-9988 | Varchar |
| Any Experience in the Industry? (So) | Yes | Varchar |
| If Yes, How Long? | 5 years | Varchar |
| Remarks | This is a test enquiry | Varchar |
| CV | Abc.pdf | Varchar |
| Posted On (Se/So) | MM-DD-YYY | Varchar |
| Status\* | Responded/ Pending | Varchar |
| Notes\* | Responded, Interview scheduled | Varchar |
| Candidate Last contacted on\* | MM-DD-YYYY | Varchar |

For every enquiry Admin/relevant HR can update the status of the form submission along with respective notes & date. The same form can be opened & added notes will be displayed one after the another.

### **Product Management**

#### Manage Coverage Plan

This will be the section from where the admin will manage the coverage plan details. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. Here, if a plan ticked as Popular, in that case, on the website application, it would appear with the POPULAR tag. Policy Max Value, min value and the Service Fee max value, min value will be applicable for the Sales Representative/Admin Users having access permissions. If the Sales Representative/Admin Users having access permissions, trying to place any outbound value for the policy and service fee, system will show alert message and won’t allow to place the order.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Plan Name\* (Se/So) | Text Box | Basic Plan | Varchar |
| Select State\* | Drop down | California | Varchar |
| Term\* | Drop down | Monthly | Varchar |
| Cost\* | Text Box | USD 59.99 | Varchar |
| Max Value\* | Text Box | USD 65 | Varchar |
| Min Value\* | Text Box | USD 25 | Varchar |
|  | | | +Add More |
| Select State\* | Drop down | New York | Varchar |
| Term\* | Drop down | Yearly | Varchar |
| Cost\* | Text Box | USD 499.99 | Varchar |
| Max Value\* | Text Box | USD 699.99 | Varchar |
| Min Value\* | Text Box | USD 399.99 | Varchar |
| Service Fee\* | Text Box | USD 75 | Varchar |
| Max Value\* | Text Box | USD 125 | Varchar |
| Min Value\* | Text Box | USD 55 | Varchar |
| Mark as Popular | Checkbox | Ticked | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Make/Brand

This will be the section from where the admin will manage the make/brand details. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Brand Name\* (Se/So) | Text Box | LG | Varchar |
| Status\* | Radio Button | Active/Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Products & Add on Item

This will be the section from where the admin will manage the product and the add on item details. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. Here, if a product is marked tick for Brand/Model Mandatory or Serial No. Mandatory, in that case, when any claim raised User must enter the Brand/Model or the Serial No to proceed with the service request.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Select Plan Name\* (Se/So) | Drop down | Premier/ Platinum | Varchar |
| Select Product Type\* | Drop down | Product/ Add-on Product | Varchar |
| Name\* | Text Box | Plumbing | Varchar |
| Term | Drop down | Monthly | Varchar |
| Price\* | Text Box | USD 75 | Varchar |
|  | | | +Add More |
| Term 2 | Drop down | Yearly | Varchar |
| Price 2\* | Text Box | USD 850 | Varchar |
| Brand Mandatory | Checkbox | Checked/unchecked | Varchar |
| Select Brand (Appears & become mandatory when Brand  marked mandatory) | Checkbox | LG/Samsung/Whirlpool/  Bosch | Varchar |
| Serial No. Mandatory | Checkbox | Checked/unchecked | Varchar |
| Status\* | Radio Button | Active/Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

Once the data is saved as per the Term & Price, it will create multiple rows in the manage grid tabular format. So, price configuration can be added at once whereas editing each & individual item price to be updated as per the Term.

#### Manage Policy Term | Split Payment

This will be the section from where the admin will manage the model no. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Policy Term\* (Se/So) | Drop down | Monthly/Yearly/ 2yrs/  3yrs/ 4yrs/ 5yrs | Varchar |
| Split Payment\* | Drop down | 4/6 | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Property Type

This will be the section from where the admin will manage the property type masters. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Property Type\* (Se/So) | Text Box | Single Family/ Condo/  Town Home/ Mobile/  Two Family/ Three Family/  Four Family | Varchar |
| Status\* | Drop down | Active/Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Property Size

This will be the section from where the admin will manage the property size masters. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Property Type\* (Se/So) | Text Box | Below 5000Sqft/  above 5000Sqft | Varchar |
| Status\* | Drop down | Active/Inactive | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

### **Customer Management**

#### Manage Customer

This will be the section from where the admin will manage the Customer details. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. The form will have the following details:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| **Personal Information** | | | |
| First name\* (Se/So) | Text Box | John | Varchar |
| Last Name\*(Se) | Text Box | Doe | Varchar |
| Email\*(Se) | Text Box | [j.doe@gmail.com](mailto:j.doe@gmail.com) | Varchar |
| Additional Email | Text Box | [John.d@gmail.com](mailto:John.d@gmail.com) | Varchar |
| Phone\* | Text Box | (714) 988-0011 | Varchar |
| Home Phone | Text Box | (714) 998-1122 | Varchar |
| **Billing Information** | | | |
| Zip Code\* | Drop Down | 12345 | Varchar |
| State\* | Auto Populate | New York | Varchar |
| City\* | Auto Populate | New York | Varchar |
| Address 1\* | Text Box | 123, Tesla Road | Varchar |
| Address 2 | Text Box | Near Madison Square | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

The Customer management tabular grid will have the following information:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Name (Se/So) | John Doe | Varchar |
| Email (Se/So) | [j.doe@gmail.com](mailto:j.doe@gmail.com) | Varchar |
| Created On (Se/So) | MM-DD-YYYY | Varchar |
| Phone (Se/So) | (714) 988-0011 | Varchar |
| Zip Code | 12345 | Varchar |
| State | New York | Varchar |
| Address 1 | 123, Tesla Road | Varchar |
| Policy Count | 10 | Varchar |
| Claims | 2 | Varchar |
| Account Status | Active/ Inactive | Varchar |
| Action Buttons: View | Edit | Create a Claim | | |

View Customer:

The View Customer will be denoted with an Eye Icon or a Magnifying Icon, on hover it will display the tooltip as “Click to View the details”. On click the system will lead the User to the following page where the detailed Customer Dashboard will be visible with multiple functionalities. The page will be as follows:

* Personal Details
* Customer Name
* Customer Email
* Phone
* Created On
* Added By
* Total Policy Value
* Card(s) Details
* Card No in XXXX XXXX XXXX1234 (with Edit Option)
* Card Expiry
* Option for Add Card -CTA
* Policy Details
* Total Policy Count
* Premium Paid
* Premium Balance
* Premium Refunded
* Total Active Ticket
* Tab- Customer Policy(s)- it will be in Tabular format with the following columns:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **P**  **O**  **L**  **I**  **C**  **Y**  **­-**  **S**  **T**  **A**  **T**  **U**  **S** | **P**  **O**  **L**  **I**  **C**  **Y**  **-**  **N**  **O** | **A**  **D**  **D**  **R**  **E**  **S**  **S** | **S**  **T**  **A**  **T**  **E** | **Z**  **I**  **P**  **C**  **O**  **D**  **E** | **P**  **R**  **I**  **C**  **E** | **C**  **R**  **E**  **A**  **T**  **E**  **D**  **O**  **N** | **E**  **F**  **F**  **E**  **C**  **T**  **I**  **V**  **E**  **F**  **R**  **O**  **M** | **E**  **X**  **P**  **I**  **R**  **Y**  **W**  **I**  **T**  **H**  **B**  **O**  **N**  **U**  **S** | **P**  **O**  **L**  **I**  **C**  **Y**  **T**  **E**  **R**  **M** | **S**  **C**  **F** | **S**  **A**  **L**  **E**  **S**  **R**  **E**  **P**  **R**  **E**  **S**  **E**  **N**  **T**  **A**  **T**  **I**  **V**  **E** | **R**  **E**  **T**  **A**  **I**  **N**  **E**  **D**  **(YES**  **/**  **NO)** | **S**  **O**  **U**  **R**  **C**  **E** | **C**  **A**  **N**  **C**  **E**  **L**  **L**  **A**  **T**  **I**  **O**  **N**  **/**  **D**  **O**  **W**  **N**  **G**  **R**  **A**  **D**  **E**  **F**  **O**  **R**  **M** | **P**  **O**  **L**  **I**  **C**  **Y**  **S**  **E**  **N**  **T**  **(Yes**  **/**  **No)** | **P**  **O**  **L**  **I**  **C**  **Y**  **S**  **E**  **N**  **T**  **O**  **N** | **A**  **C**  **C**  **C**  **E**  **P**  **T**  **E**  **D**  **O**  **N** | **P**  **O**  **L**  **I**  **C**  **Y**  **R**  **E**  **C**  **E**  **I**  **P**  **T**  **S**  **E**  **N**  **T**  **O**  **N** | **S**  **E**  **R**  **V**  **I**  **C**  **E**  **T**  **I**  **C**  **K**  **E**  **T** |

* Tab- CC/ PayPal Payments - it will be in Tabular format with the following columns:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **P**  **O**  **L**  **I**  **C**  **Y**  **­-**  **N**  **O** | **R**  **E**  **C**  **U**  **R**  **R**  **I**  **N**  **G**  **T**  **Y**  **P**  **E** | **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **S**  **T**  **A**  **T**  **U**  **S** | **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **S**  **C**  **H**  **E**  **D**  **U**  **L**  **E**  **D**  **D**  **A**  **T**  **E** | **P**  **A**  **I**  **D**  **O**  **N** | **A**  **M**  **O**  **U**  **N**  **T** | **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **T**  **Y**  **P**  **E** | **T**  **R**  **A**  **N**  **S**  **A**  **C**  **T**  **I**  **O**  **N**  **I**  **D** | **C**  **C**  **N**  **O** | **E**  **X**  **P**  **I**  **R**  **E**  **D**  **O**  **N** | **P**  **O**  **L**  **I**  **C**  **Y**  **S**  **T**  **A**  **T**  **U**  **S** | **A**  **D**  **D**  **E**  **D**  **O**  **N** |

* Tab- Bank Payment/ACH Payments - it will be in Tabular format with the following columns:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **A**  **C**  **T**  **I**  **O**  **N**  **-**  **E**  **D**  **I**  **T**  **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **D**  **A**  **T**  **A** | **P**  **O**  **L**  **I**  **C**  **Y**  **­-**  **N**  **O** | **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **T**  **Y**  **P**  **E** | **C**  **H**  **E**  **C**  **K**  **N**  **O** | **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **S**  **T**  **A**  **T**  **U**  **S** | **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **F**  **O**  **R** | **E**  **X**  **P**  **E**  **C**  **T**  **E**  **D**  **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **D**  **A**  **T**  **E** | **P**  **A**  **Y**  **M**  **E**  **N**  **T**  **S**  **U**  **C**  **C**  **E**  **S**  **S**  **D**  **A**  **T**  **E** | **A**  **M**  **O**  **U**  **N**  **T** | **P**  **O**  **L**  **I**  **C**  **Y**  **S**  **T**  **A**  **T**  **U**  **S** | **C**  **O**  **M**  **M**  **E**  **N**  **T**  **S** | **U**  **P**  **D**  **A**  **T**  **E**  **D**  **B**  **Y** |

* Tab- Service Tickets Debited - it will be in Tabular format with the following columns:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **A**  **C**  **T**  **I**  **O**  **N**  **-**  **R**  **E**  **F**  **U**  **N**  **D**  **P**  **A**  **Y**  **M**  **E**  **N**  **T** | **T**  **I**  **C**  **K**  **E**  **T**  **­-**  **N**  **O** | **P**  **O**  **L**  **I**  **C**  **Y**  **­-**  **N**  **O** | **C**  **L**  **A**  **I**  **M**  **C**  **A**  **T**  **E**  **G**  **O**  **R**  **Y** | **A**  **M**  **O**  **U**  **N**  **T** | **R**  **E**  **F**  **U**  **N**  **D**  **A**  **M**  **O**  **U**  **N**  **T** | **A**  **G**  **E**  **N**  **T**  **N**  **A**  **M**  **E** | **R**  **E**  **F**  **U**  **N**  **D**  **E**  **D**  **O**  **N** | **C**  **O**  **M**  **M**  **E**  **N**  **T**  **S** |

* Tab- Policy Documents - it will be in Tabular format with the following columns:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **P**  **O**  **L**  **I**  **C**  **Y**  **\_**  **N**  **O** | **P**  **O**  **L**  **I**  **C**  **Y**  **S**  **T**  **A**  **T**  **U**  **S** | **D**  **O**  **C**  **U**  **M**  **E**  **N**  **T**  **L**  **I**  **N**  **K** | **A**  **D**  **D**  **E**  **D**  **O**  **N** | **A**  **D**  **D**  **E**  **D**  **B**  **Y** | **U**  **P**  **D**  **A**  **T**  **E**  **D**  **O**  **N** | **U**  **P**  **D**  **A**  **T**  **E**  **D**  **B**  **Y** |

Further this section will have tabular data for the followings:

* Tab-Service Tickets

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **T**  **I**  **C**  **K**  **E**  **T**  **\_**  **N**  **O** | **P**  **O**  **L**  **I**  **C**  **Y**  **-**  **N**  **O** | **A**  **D**  **D**  **E**  **D**  **B**  **Y** | **A**  **D**  **D**  **E**  **D**  **O**  **N** | **T**  **I**  **C**  **K**  **E**  **T**  **D**  **E**  **T**  **A**  **I**  **L** | **T**  **I**  **C**  **K**  **E**  **T**  **S**  **T**  **A**  **T**  **U**  **S** | **A**  **C**  **T**  **I**  **O**  **N**  **-**  **E**  **D**  **I**  **T**  **T**  **I**  **C**  **K**  **E**  **T** |

* Tab-Policy Notes

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **P**  **O**  **L**  **I**  **C**  **Y**  **-**  **N**  **O** | **P**  **O**  **L**  **I**  **C**  **Y**  **S**  **T**  **A**  **T**  **U**  **S** | **P**  **O**  **L**  **I**  **C**  **Y**  **-**  **N**  **O**  **T**  **E** | **A**  **D**  **D**  **E**  **D**  **O**  **N** | **A**  **D**  **D**  **E**  **D**  **B**  **Y** | **U**  **P**  **D**  **A**  **T**  **E**  **D**  **O**  **N** | **U**  **P**  **D**  **A**  **T**  **E**  **D**  **B**  **Y** |

* Tab-Cancellation Request History

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **POLICY**  **NO** | **CANCELLATION**  **REASON** | **SUBMITTED**  **ON** | **CURRENT**  **STATUS** | **CANCELLATION**  **FORM** | **REQUESTED**  **BY** | **ASSIGNED**  **TO** | **VIEW LOG** |

* Tab-Referrals

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **CUSTOMER**  **NAME** | **NO.OF.**  **POLICIES** | **POLICY NO** | **CREATED ON** | **STATUS** | **POLICY**  **AMOUNT** | **PAID**  **AMOUNT** | **DUE**  **AMOUNT** |

There will be multiple action buttons (CTA) for quick functionalities as follows:

* Add New Policy- on click, the new policy form will open, and policy can be created by the Admin Users as per access permission.
* Edit Customer
* Add a Claim
* Add Policy Note
* Add Ticket Note
* Access Customer Portal- Admin users can access the Customer Portal on behalf of the Customer with limited functionality.
* Reset Customer Portal Password
* Deactivate Recurring Payment
* Add Check/Bank Payment for the Customer at Policy/ Service Ticket Level.

### **Policy Management**

#### Manage Policies

This will be the section from where the admin will manage the Policy level details. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

There will be dynamic information for the policy as follows:

* Policy Amount
* Total Paid Amount
* Last Payment Amount
* Last Payment Date
* Total Balance Amount
* Amount Refunded
* No. of Tickets
* Ticket No

The form will have the following details:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Policy No (So) | Bas786786897 | Varchar |
| Policy Sent By | John Doe | Varchar |
| Sent On | MM-DD-YYYY | Varchar |
| IP Address | 101.0.0.1 | Varchar |
| Platform | Windows | Varchar |
| Browser | Chrome v17.8.9.5 | Varchar |
| Accepted On | MM-DD-YYYY | Varchar |

Further, it will show the **Policy Change History Log** as follows:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Policy No (So) | Bas786786897 | Varchar |
| Address | 123, Tesla Road | Varchar |
| Policy Amount | 120.99 | Varchar |
| PCF | 39.99 | Varchar |
| Holding Period | 30 Days | Varchar |
| Effective Date | MM-DD-YYYY | Varchar |
| Expiry Date | MM-DD-YYYY | Varchar |
| Bonus Month | 0 | Varchar |
| Expiry Date with Bonus | MM-DD-YYYY | Varchar |
| Policy Term | 5 Years | Varchar |
| Property Type | Mobile | Varchar |
| Property Size | Less than 5000 sq. ft. | Varchar |
| Sales Representative | Jane Doe | Varchar |
| Added On | MM-DD-YYYY | Varchar |
| Update Notes | This is a test policy update note | Varchar |

**Policy Status Update History** will also be captured here as-

**“<Agent\_Name> updated <Policy\_no> on <Date Time Stamp> from <Previous\_policy\_status> to <Current\_policy\_Status>”**

This will give the information to the admin who has updated which policy at what time from which state to what state.

\*\*Also, each & every time any policy related information is added/edited over the system this log will be updated. The functionality includes any changes in Policy data and its respective Service Ticket data.

#### Manage Renewals

This will be the section from where the admin will manage the Renewal Policy details. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the followings:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Policy No (So) | Bas786786897 | Varchar |
| Policy Status (So) | Expired | Varchar |
| Renewal Status (So) | Renewal Pending | Varchar |
| Assigned To (So) | John Doe | Varchar |
| Leave a Note | Add a Note option | Varchar |
| Last Note Added On (So) | MM-DD-YYYY | Varchar |
| Last Note Added By | Jane Doe | Varchar |
| Customer Name | Joe Doe | Varchar |
| Email (So) | [Joe.doe@gmail.com](mailto:Joe.doe@gmail.com) | Varchar |
| Phone | (714) 991-1234 | Varchar |
| Policy Term (So) | 2 Years | Varchar |
| Policy Value (So) | 299.99 | Varchar |
| Policy Ordered On (So) | MM-DD-YYYY | Varchar |
| Policy Start Date (So) | MM-DD-YYYY | Varchar |
| Policy Expiry Date (So) | MM-DD-YYYY | Varchar |
| Expiry with Bonus Month (So) | MM-DD-YYYY | Varchar |
| Sales Representative (So) | Mr. XYZ | Varchar |
| Total Claims (So) | 2 | Varchar |
| New Policy No | Pre6545667 | Varchar |

There will be multiple Policy Renewal Status as follows:

* Failed Renewal
* Renewal Rejected by Customer
* Renewal Pending
* Renewed
* Manual Renewal Attempt Pending
* Manual Renewal Attempt Failed

#### Manage Cancellation Requests

This will be the section from where the admin will manage the cancellation policy request details. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the followings:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Policy No (So) | Bas786786897 | Varchar |
| Customer Name (So) | John Doe | Varchar |
| Customer Email (So) | [j.doe@gmail.com](mailto:j.doe@gmail.com) | Varchar |
| Customer Phone | (714) 886-5544 | Varchar |
| Type of Request (So/Se/Fi) | Cancellation/ Downgrade | Varchar |
| Sales Representative (So) | Jane Doe | Varchar |
| Policy Term | 2 years | Varchar |
| Previous State (So/Se/Fi) | Active | Varchar |
| Cancellation Reason | Financial Difficulty | Varchar |
| Requested On (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Requested By (So/Se/Fi) | Mr. John Doe | Varchar |
| Assigned To (So/Se/Fi) | Alice Stellar | Varchar |
| Notes | This is for testing purpose | Varchar |
| View Log | John Doe placed the  cancellation request  on 12-31-2022 for  Policy No: Bas786786897 | Varchar |
| Cancellation Form | Abcd.pdf | Varchar |
| Current Status (Edit Option) (So/Se/Fi) | [Retained](mailto:Joe.doe@gmail.com) | Varchar |

From here, Admin can update the status of the request. There we will have the following Cancellation/Downgrade Status:

Retained

Cancel the Customer

Cancellation Request Received

Follow up with Customer

Calculate the Refund

Further, we will have the following Cancellation Reasons which to be filled up by the Customer/ Admin while raising the Cancellation request:

Financial Difficulty

Selling My Property

Dissatisfied with Claim Resolutions

Policy Term did not expect the expectation

Others

Admin/ Customer Care Representative can select any of the request and can Assign a User to the task for get the request processed.

#### Manage Payment History

This will be the section from where the admin will manage the Payment History details. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the followings:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Policy No (So) | Bas786786897 | Varchar |
| Customer Name (So) | John Doe | Varchar |
| Payment Type | Card/Proforma/PayPal | Varchar |
| Amount | 129.99 | Varchar |
| Transaction ID | 5JP18969CG31767678Q | Varchar |
| Successful Payment Date | MM-DD-YYYY|HH:MM:SS | Varchar |
| Payment Status | Paid/Pending/Failed/Successful/  Monthly Recurring/ Deactivated | Varchar |
| Payment Updated By | Mr. Customer Care Representative | Varchar |
| Payment Updated On | MM-DD-YYYY | Varchar |
| Comments | This is a test Payment update | Varchar |
| Action | Refund Payment| Edit Payment|  Deactivate Payment | Varchar |

#### Manage Failed Payment

This will be the section from where the admin will manage Failed Payment details. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the followings:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Policy No (So) | Bas786786897 | Varchar |
| Customer Name (So) | John Doe | Varchar |
| Customer Email (So) | [j.doe@gmail.com](mailto:j.doe@gmail.com) | Varchar |
| Phone No (Se) | (714) 988-1232 | Varchar |
| Failed Payment Amount | 1120.99 | Varchar |
| Failed Payment Count | 4 | Varchar |

### **Technician/ Contractor Management**

#### Manage Technician Network Module

This will be the section from where the admin will manage all the Technician details. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the followings:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Company Name (So) | Salt Home Services | Varchar |
| Email (So) | [salt@gmail.com](mailto:salt@gmail.com) | Varchar |
| No.of Jobs (So) | 10 | Varchar |
| Technician Phone (So) | (714) 899-1231 | Varchar |
| Zipcode (So) | 12345 | Varchar |
| State | New York | Varchar |
| City | New York | Varchar |
| Services | Plumbing, Clothe Washer, Kitchen | Varchar |
| Diagnostic Fee (So) | 39.99 | Varchar |
| Radial Distance Covered | 5 Miles | Varchar |
| Added By | John Doe | Varchar |
| Added On | MM-DD-YYYY | Varchar |
| Verified | Yes/No | Varchar |
| Registration Approved | Yes/No | Varchar |
| Status | Available/Not Available | Varchar |
| Account Status | New/ Pending/ Approved/Inactive/Blacklisted | Varchar |
| Notes | This is a test note | Varchar |
| Action | Edit | View| Access Technician Portal | Varchar |

#### Manage Claims

This will be the section from where the admin will manage all the Claim details. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. A request can be rejected by the Customer Care Executive as well.

The Policy Information data will have the followings:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Ticket No (So) | AC8978979080990 | Varchar |
| Requester Name | [John](mailto:salt@gmail.com) Doe | Varchar |
| Total No. of Tickets (So) | 5 | Varchar |
| Total Premium (So) | 129.99 | Varchar |
| Task Status (So/Se/Fi) | Ready to Dispatch | Varchar |
| Category (So/Se/Fi) | AC | Varchar |
| Assigned To (So/Se/Fi) | Jane Doe | Varchar |
| Ticket Logged Date (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Updated On (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Last Note Added On (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Ticket Details | This is a test ticket | Varchar |
| Ticket Status | Pending/ Active/ Completed | Varchar |

Ticket related data will be shown as follows; Customer Care Executive can edit the following details:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Ticket No (So) | AC8978979080990 | Varchar |
| Requester Phone No | (714) 999-1234 | Varchar |
| Covered Item (So) | AC | Varchar |
| Total Premium (So) | 129.99 | Varchar |
| Item related Questions | Has the home system ever had  an issue before? \* | Varchar |
| Ticket Description | This is a test ticket | Varchar |
| Serial No | LG-1234 | Varchar |
| SCF | 34.99 | Varchar |
| Charge SCF | CC/Previously Saved Cards | Varchar |
| Assigned To (So/Se/Fi) | Jane Doe | Varchar |
| Ticket Logged Date (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Days Between Policy Start & Claim  logged date | 245 Days | Varchar |
| Updated On (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Last Note Added On (So/Se/Fi) | MM-DD-YYYY | Varchar |

Further there will be Action buttons as follows:

* Bulk Ticket Assign- Admin/ CC Department as per requirement & access can assign Bulk tickets to a respective department/ Admin User to further processing
* Tab- Other Claims on Policy - On click it will display the other claims on the same Policy in tabular format as follows:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Ticket No (So) | AC8978979080990 | Varchar |
| Covered Item (So/Se/Fi) | Washing Machine | Varchar |
| Ticket Logged Date (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Make | LG | Varchar |
| Model | 5 kg front load washing machine | Varchar |
| Serial No | LG-1234 | Varchar |
| Ticket Status (So/Se/Fi) | Pending/ Active/ Completed | Varchar |
| Updated On (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Last Note Added On (So/Se/Fi) | MM-DD-YYYY | Varchar |
| Ticket Details | This is a test ticket | Varchar |

There will be more action buttons like as follows:

* Send Quote to Customer
* Open Diagnostic Form
* Upload Diagnostic File
* Upload Claim Documents
* Leave a Note
* Request More Information from Technician
* Customer Availability & Appointments- On click a Calendar will appear from where Customer Care Executive/ Technician can see the Customer’s availability for the inspection
* Add Claim Cost- Based on access permissions relevant cost can be added for the respective claim
* View Ticket Notes
* View Policy Notes

### **Real Estate Professionals Management**

#### Manage Real Estate Agent

This will be the section from where the admin will manage the details of Real Estate Professionals. This section of the system will have the functionality like view as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Company Name\* (Se/So) | Test Real Estate Pvt. Ltd. | Varchar |
| Contact Name\* | John Doe | Varchar |
| Phone No\* | (714) 766-8811 | Varchar |
| Mailing Address\* | Test Address | Varchar |
| Real Estate Account Type\* | Real estate Agent/ Closing/Title/ Administrator | Varchar |
| Office Address\* | Test office address | Varchar |
| Zip\* | 12345 | Varchar |
| State\* | New York | Varchar |
| City\* | New York | Varchar |

### **Sales Representative Management**

#### Manage Commissions

This will be the section from where the admin will manage the Sales Commission details. This section of the system will have functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv. The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Commission Type | Drop down | Policy/ SPIFF/ One Day Sale/  Full Paid | Varchar |
| **Commission on Policy** | | | |
| Policy Term \* | Drop down | Monthly/ 1 Year/ 2years | Varchar |
| Lower Limit\* | Text Box | 45 | Varchar |
| Upper Limit\* | Text Box | 99 | Varchar |
| Percentage/ Price\* | Drop down | [Percentage/](mailto:j.taylor@gmail.com) Price | Varchar |
| Value\* | Text Box | 25 | Varchar |
| Commission on Full Paid | Text Box | 2 times of initial Commission | Varchar |
| **Commission on SPIFF** | | | |
| Target Value\* | Text Box | 10000 | Varchar |
| SPIFF\* | Text Box | 100 | Varchar |
| **Commission on One Day Sale Value** | | | |
| One Day Sale | Text Box | 2500 | Varchar |
| Commission Value\* | Text Box | 100 | Varchar |
| Added By | Auto populated | System Users | Varchar |
| Added On | Auto populated | Date Stamp | Varchar |
| Updated By | Auto populated | Admin | Varchar |
| Updated On | Auto populated | Date Stamp | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

**\*\*All Commission value will affect 30 days after the date of sale.**

**SPIFF value will be calculated based on one day fees collected by a Sales Representative. This Fees Collected includes new policy payment value and old policy renewal.**

**\*\* On Sunday, SPIFF WON’T be calculated. Also on Sunday, even if the Customer full policy amount, the commission WON’T be DOUBLE.**

FPHW shared the commission structure for reference, whereas all the data will be managed dynamically.

#### Manage Sales Report

This will be the section from where the admin will manage the Sales Representative details. This section of the system will have functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Total Policy Count (So) | 250 | Varchar |
| Actual Billing (So) | USD 15,02,522 | Varchar |
| Scheduled Billing (So) | USD 9,00,125 | Varchar |
| Total Billing (So) | Actual + Scheduled Billing | Varchar |
| Cancelled Amount | USD 10,005.00 | Varchar |
| Cancelled Policy Count (So) | 85 | Varchar |
| Policy Source (So) | Sales Representative/ Proforma/  Renewal | Varchar |

The data can be further sorted with the following parameters:

* Date Range
* Sales Representative
* State-wise

#### Manage Sales Representative Commission

This will be the section from where the admin will manage the Sales Representative Commission details. This section of the system will have functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |
| --- | --- | --- |
| **Form Field** | **Input Example** | **Data Type** |
| Sales Representative Name (Se/So) | John Taylor | Varchar |
| Added Date | 07-21-2023 | Varchar |
| Paid On | 07-22-2023 | Varchar |
| Payment Status | Paid-Card/ Pending-Card etc. | Varchar |
| Customer Name | Joh Doe | Varchar |
| Policy No | FP6757668 | Varchar |
| Policy Plan | Basic Policy | Varchar |
| Policy Term | 2 years | Varchar |
| Full Paid/Split Payment | Split Payment | Varchar |
| Payment | 1050.00 | Varchar |
| Policy Commission | 75.00 | Varchar |
| SPIFF Commission | 5.00 | Varchar |
| Total Commission | 80.00 | Varchar |
| Commission Paid Status | [Paid/](mailto:j.taylor@gmail.com) Pending | Varchar |

**Over here, if any of the Sales Representative achieved the one-day sale value i.e., 2500 or higher on that case, the Sales Representative name will be highlighted and on click a popup will appear with the commission detail & the extra earned commission as part of daily sale hit. This data can be further exported in CSV as well.**

**Further there will be an area from where the Admin can update the Commission paid amount as the commission paid. On save, Total Commission Paid and Commission Due Payment value will be updated accordingly.**

The data can be further sorted with the following parameters:

* Date Range
* Sales Representative

### **Affiliate Management**

#### Manage Affiliates

This will be the section from where the admin will manage the affiliate enquiries. This section of the system will have functionality like edit(status)/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Name \* (Se/So) | Text Box | John Doe | Varchar |
| Email\* | Text Box | [j.doe@gmail.com](mailto:j.doe@gmail.com) | Varchar |
| Phone No.\* | Text Box | (714) 889-9922 | Varchar |
| Company Name\* | Text Box | Google Inc. | Varchar |
| Message\* | Text Box | This is a test message | Varchar |
| Posted On\* | Text Box | MM-DD-YYYY | Varchar |
| User Agent\* | Text Box | IP  Device  OS  Location | Varchar |
| Status\* (Se/So/Fi) | Radio Button | New/ Contacted/ Closed | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

#### Manage Affiliate Invoices

This will be the section from where the admin will manage the Affiliates Invoices. Multiple Invoices for a single affiliate can be managed from this section. This section of the system will have the functionality like add/edit/view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Name \* (Se/So) | Text Box | John Doe | Varchar |
| Email\* | Text Box | [j.doe@#gmail.com](mailto:j.doe@#gmail.com) | Varchar |
| Phone No.\* | Text Box | (714) 889-9922 | Varchar |
| Invoice | File Upload | Jd\_invoice.pdf | Varchar |
| Invoice Created On\*(Se/So) | Date field | MM-DD-YYYY | Varchar |
| \* Denotes Mandatory Field. Form Submission will not work without a proper value against this. | | | |
| Action Buttons: Submit | Cancel | | | |

### **Enquiry Management**

#### Manage Enquiry

This will be the section from where the admin will manage the enquiries coming from the website application. This section of the system will have functionality like view/delete as per the access permission enabled for the respective logged in user. The set of data will have pagination & can be further exported into .csv.

The form will have the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Form Field** | **Type of Input** | **Input Example** | **Data Type** |
| Name\* (Se/So) | Text Box | John Doe | Varchar |
| Email\* | Text Box | [j.doe@gmail.com](mailto:j.doe@gmail.com) | Varchar |
| Phone\* | Text Box | (714) 887-9933 | Varchar |
| Enquiry Type\*(Se/So) | Drop down | Sales/ Website/ Claim/  Policy/ Billing/ Affiliate | Varchar |
| Message\* | Text Box | This is a text message | Varchar |
| Posted On\* | Date Field | MM-DD-YYYY | Varchar |
| User Agent Info | Text Box | IP  Location  Browser  OS  Device | Varchar |
| Action Buttons: View | Cancel | | | |

### **Logout**

Once the user clicks on the Logout option, the user will be asked for a confirmation message. If the user agrees to log out of the application on the confirmation message, they will be successfully logged out. If the user opts not to log out of the application on the confirmation message, then the user will remain active on the same page from where he/she clicked the Logout option.

# Other Nonfunctional Requirements

### **Security Requirements**

The solution should be developed as per OWASP security guidelines (refer [https://owasp.org/www-pdf-archive/OWASP SCP Quick Reference Guide v2.pdf](https://owasp.org/www-pdf-archive/OWASP_SCP_Quick_Reference_Guide_v2.pdf) ).

\*As suggested financial data storage should be avoided and if required should be as per GDPA norms.

# Constraints

## **Time Line:**

Late changes in business flow will impact the proposed & approved project timeline & additional resource engagement.

## **Resource:**

Continuous changes in business flow will impact the proposed & approved project timeline & additional resource engagement.

## **Response time:**

Static page contents, banners, email settings, domain purchase, email server purchase/ any 3rd party tool purchase delay may delay the overall execution of the project & may increase the cost of the application development.

# Risks and Mitigation

The project related risks and the associated mitigation plan have been detailed out in the following table:

| **Risks** | **Impact** | **Mitigation Plan** |
| --- | --- | --- |
| Any late implementation of Design related changes might be detrimental in ensuring the system stability. | High Quality, Schedule, Cost | Any late architectural changes should be evaluated in terms of business criticality, revenue leakage and security. Based on the evaluation, the late architecture change should be approved by the key stakeholders. |
| Any delay in feedback from client end might delay implementation and hence affect schedule | Medium – Schedule | All required queries or clarifications should be brought to the attention of the client as much in advance as possible to provide sufficient time for feedback. Client should respond with feedback within 24-48 hrs. from receiving query. |

# Assumptions

* The project will be completed within the allocated budget and timeline.
* The technology infrastructure will be available and accessible for the project team.
* Stakeholders will provide timely feedback and approvals as needed.
* All legal and regulatory requirements will be met.
* The project will not be affected by external factors beyond the project team's control, such as natural disasters or political instability.
* Users will have the necessary skills and knowledge to use the system effectively.

# Sign-Off

The following people legally represent both the Parties from their side and conclude the agreement as required mutually agreeing to all the terms and conditions mentioned herein this Agreement:

By the Service Providers: **One41 Tech Pvt. Ltd.**

Name:

<Designation>

(Signature)

Date:

Place:

By the Client: **First Premier Home Warranty**

Name:

<Designation>

(Signature)

Date:

Place: