Insurance Product Lead Generation Application

User stories and business requirements

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Document approval

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Overview

A web application which will be used by its customers to compare different types of the insurance products. However, the application will be built in different phases to include different products. In this document we include the user stories for the Phase 1 only. In this phase we will develop the lead generation functionalities for life insurance.

Workflow

| The customer visits the home page and sees the different types of life insurances | → | The customer selects the type and complete the guided form | → | The customer submits the form | → | The form data is stored in database | → | Backoffice user downloads the information and forwards to an insurance advisor |
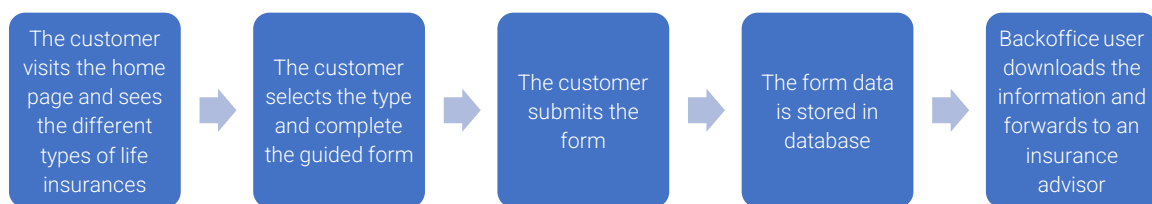
Life insurance types

There will be the following two types of life insurance products.

1. **Solo:** A life insurance for one person only and
2. **Joint:** A life insurance for two persons, usually spouses.

The number of questions in the guided form will depend on the type of the life insurance selected.

User stories

User types

The application will have the following types of users at this stage.

1. **Customer:** A Customer is a user who visits the application to obtain a quote and
2. **Backoffice user:** A Backoffice user is a user who can access the stored data on the database. The access of Backoffice user will be password protected.
3. **Admin user:** An Admin user is a Backoffice user with an additional permission to manage the Backoffice users.

Customer user stories

Given an insurance quote application,

WHEN I visit the site for the first time
THEN I am presented with the homepage, briefly explaining the process and option to start the quote
WHEN I click on the "Get Quote" link
THEN I am presented with two types of life insurances, 1) Just me and 2) Me and my partner
WHEN I select an option,
THEN I am presented with a set of questions
WHEN I submit my answers to all questions
THEN I am presented with a confirmation that the responses are stored, and an insurance advisor will contact me. If for any reasons, the responses are not successfully stored, THEN I will be presented with an error message

Backoffice user stories

WHEN I visit the appropriate section of the site
THEN I am presented with the option to enter my log in credentials
WHEN I enter and submit my log in credentials
THEN the application will verify my username and encrypted password
WHEN the verification is successful
THEN the application will log me in, otherwise, present me with "Incorrect login details" error message
WHEN I log in for the first time,
THEN the application will force me to change my temporary password
WHNE I am logged in,
THEN I am presented with a list of actions I can perform. The list will include the following: Download new data, View Downloaded data. I will also be presented with a "Settings" menu, from which I will be able to change my password and log out from the application.
WHEN I click "Download new data" link,
THEN I will be presented with the data that are not downloaded already and the "Download now" button
WHEN I click the "Download now" button,
THEN the application will generate and download a .xlsx file containing all the data that were not previously downloaded, and change the "Download status" for all these data to "Downloaded"
WHEN I click the "View Downloaded data" link,
THEN I am presented with a list of all historical downloads and links to previous .xlsx files. If I want, I can click on the files and re-download any of the files

WHEN I click the "Change password" link,   THEN I am presented a form the change my current password to access the Backoffice
WHEN I submit the new password,   THEN the application will validate that the new password complies with the existing password policy. If the validation is successful, the application will store the password after strong encryption. If the validation is not successful, the application will display appropriate error message
WHEN I click the "Log out" link,   THEN the application will log me out from the Backoffice and land me on the Backoffice login page

Admin user stories

WHEN I log in to the Backoffice   THEN the application will present me the list of actions based on my user type. If my user type is "Admin user" then I will have the additional option of "Manage users"
WHEN I click "Manage users" link   THEN I am presented with an extended action menu, that will include "Add new user", "Modify existing users" and "Reset password".
WHEN I click the "Add new user" link,   THEN I am presented with a blank form to enter the first and last name of the user, email address of the user (which will be used as the username to log in), and select the user type (Backoffice or Admin)
WHEN I submit the completed form,   THEN the application will for run duplicity checks on the username. If no duplicates are found, THEN the application will register the user and display the auto-generated temporary password on the screen.
WHEN I click the "Modify existing users",   THEN I am presented with a form to search for a specific user. The form shall include the first name, last name, and email address. A search can be run with only one field completed.
WHEN I submit the form,   THEN I am presented with the list of users matching the search parameters
WHEN I select a specific user,   THEN I am presented with the option to either "Deactivate" or "Modify" the user
WHEN I choose to "Deactivate" the user   THEN I am presented with a warning message
WHEN I confirm the warning message,

THEN the selected user is deactivated immediately and will be forcefully logged out from all the sessions
WHEN I choose to "Modify", THEN I am presented with the user information, the email address field being disable for editing
WHEN I make any changes to the user profile and submit the form THEN I am presented with a confirmation form
WHEN I confirm the changes THEN the application saves the changes. If the selected user's type is changed from "Backoffice user" to "Admin user", the change will take effect on the next log in, however, if the user type is changed from "Admin user" to "Backoffice user", then user will be immediately logged out from all sessions and will be required to log in again.
WHEN I click the "Reset password" link, THEN I am presented with a form to search for a specific user. The form shall include the first name, last name, and email address. A search can be run with only one field completed.
WHEN I submit the form, THEN I am presented with the list of users matching the search parameters
WHEN I select a specific user, THEN I am presented with the option to reset the password of the user
WHEN I click the "Reset password" link THEN I am presented with a warning message
WHEN I confirm the warning message, THEN the application will remove the existing encrypted password of the user and assign a temporary password. The temporary password will be displayed on the screen. If the selected user is logged in, the user will be immediately logged out from all sessions forcefully.

Other requirements

- The application shall use https protocol,
- The application shall be responsive,
- The architecture shall be scalable so that different types of insurance can be added in the future, and
- All communication between the application and the server must be encrypted.