

# IPA

## Insurance Plumbing App



**Client : Vinesh Naidu**

**Developers : Theoveshan Naidu**

**Alexandros Petrou**

**Janaki Patil**

**Tristan Sander-hughes**

**Zi Xin Zhang**

## **System overview**

This website eases the workflow of an admin since it allows the admin to capture caller details, generate a case report, close cases that are completed, generate reports, add new employee, delete existing employee and generate statistics to give them an overview. This website is only designed for the admin.

## **System Configuration**

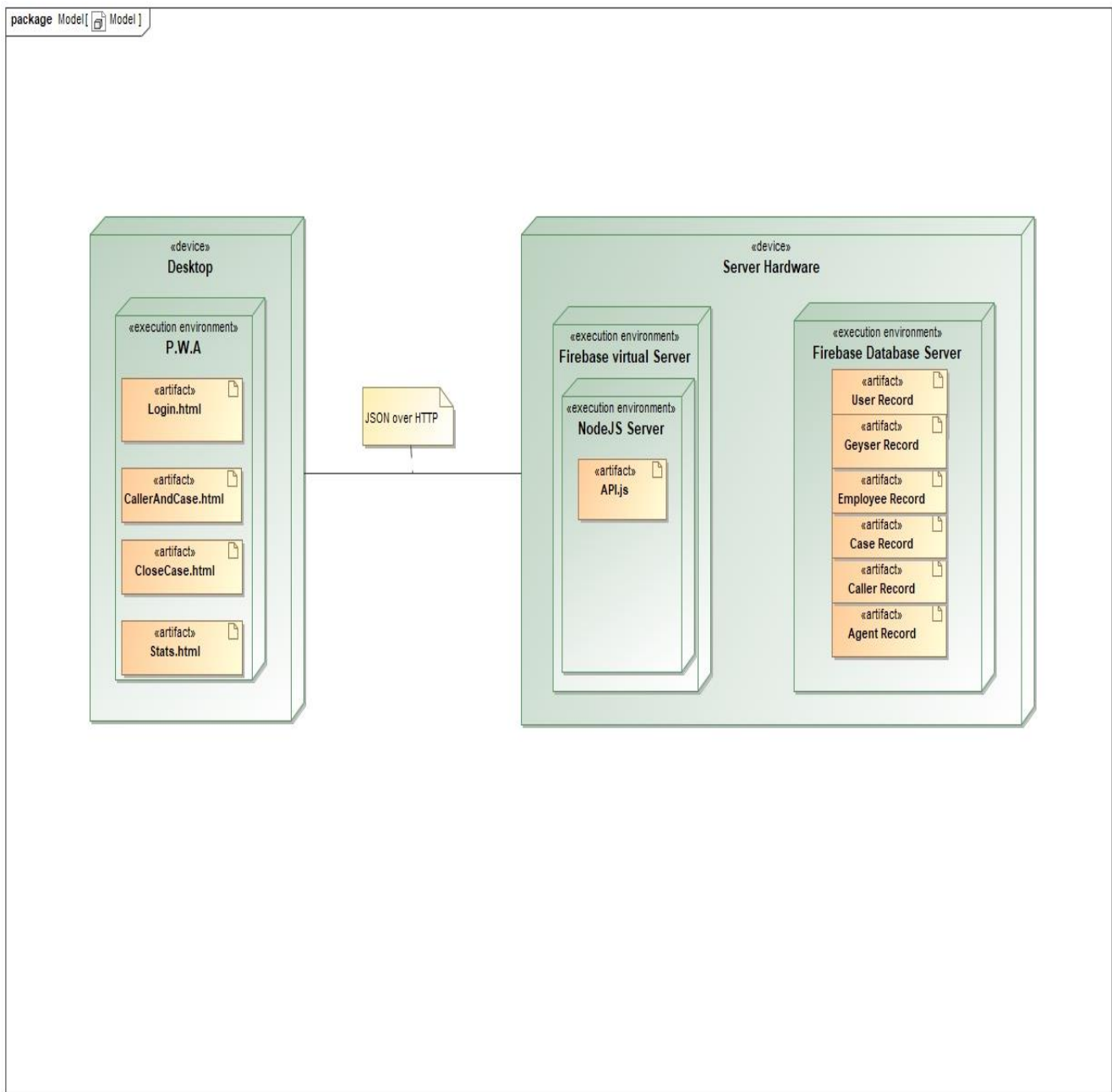
This website works across all the web browsers. Furthermore, it communicates with the database for all events that are performed by the admin. To access this website, internet connection is required.

## **Getting Started**

A typical walkthrough of this website is as follows:

1. Login using your credentials. If you are a new user than signup first and then login.
2. When you get the home owner's details from the caller itself or from an insurance company, open up a new case for that caller.
3. View cases that needs to be closed and then close them by using your agent ID.
4. Various search criteria are provided on the search tab for example if you want to know how many cases are handled by a plumber than insert that plumbers ID or if you want to find out about a specific geyser details enter the geyser barcode, etc.
5. Statistics on various factors of the company can be viewed by clicking the stats tab.
6. One can add a new employee's record or delete an existing employee's record.

## Deployment Diagram



**This deployment model basically gives you an overview of the system and what artifacts and technologies are used to deploy this system.**

## ***Guidelines as how to use this website***

### ***Login Page***

=> If you are not a new agent then enter your credentials in order to proceed.

The image shows a login interface on a blue background. At the top, the text "IPA LOGIN" is centered in white. Below it is a white form with two input fields: "Username" and "Password". A black button labeled "SIGN IN" is positioned below the fields. Below the button, the text "Sign up" is displayed in a light blue color. A large black arrow points from a white callout box to the "Sign up" text. The callout box contains the text: "If you are a new user click here to generate you credentials."

## Signup Page

⇒ If you are a new agent, you have to signup first and then login to proceed.

IPA

### Sign Up New Agent

Full name

Agent ID

Note: please click the generate button to create an ID.

GENERATE AGENT ID

Click that button in order to generate an agent ID. This is the ID you will use to login so remember it.

Password

Note: Generate or type your own password.

Show Password

☐

GENERATE AGENT PASSWORD

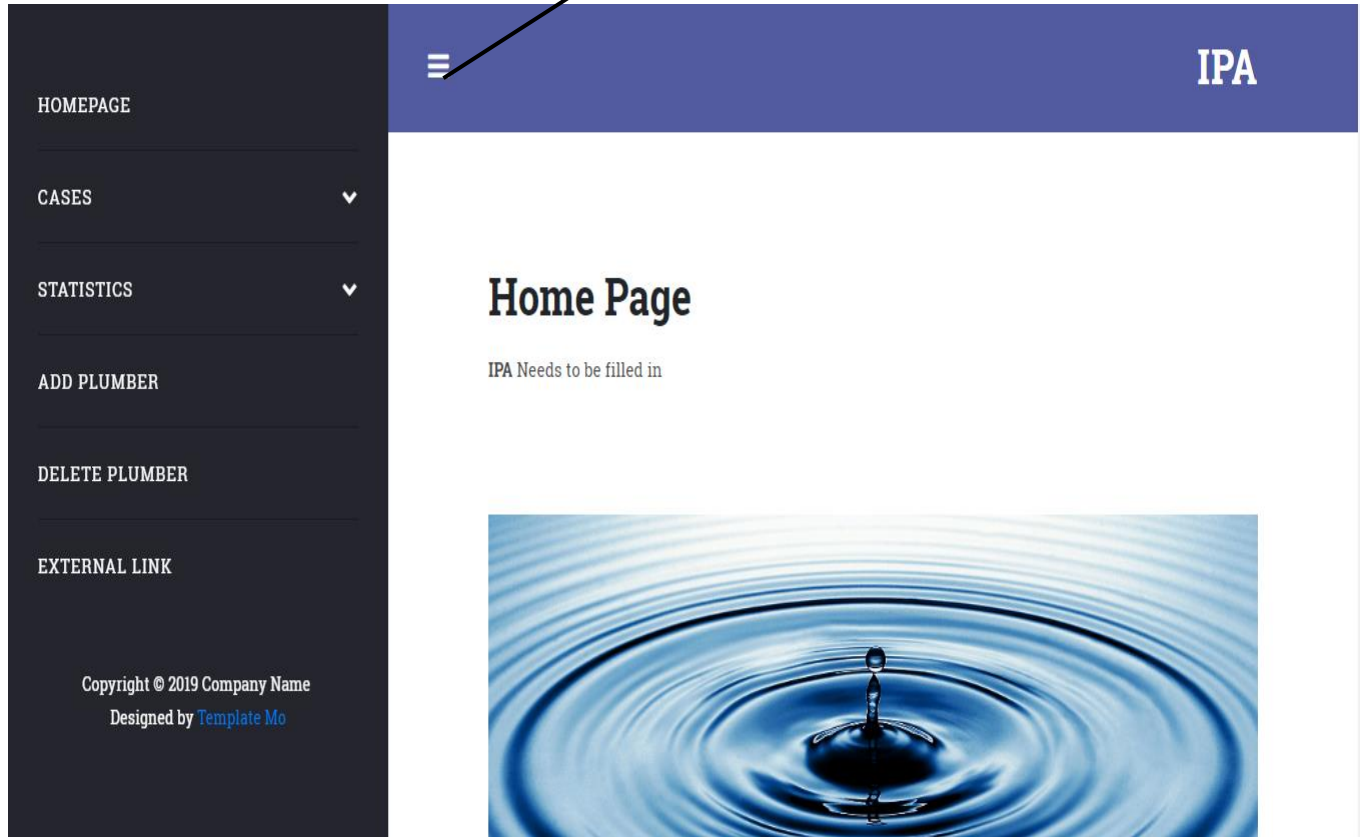
By clicking this button you will get a suggested password which we highly recommend for security purpose otherwise you can create your own password.

Confirm Password

SIGNUP

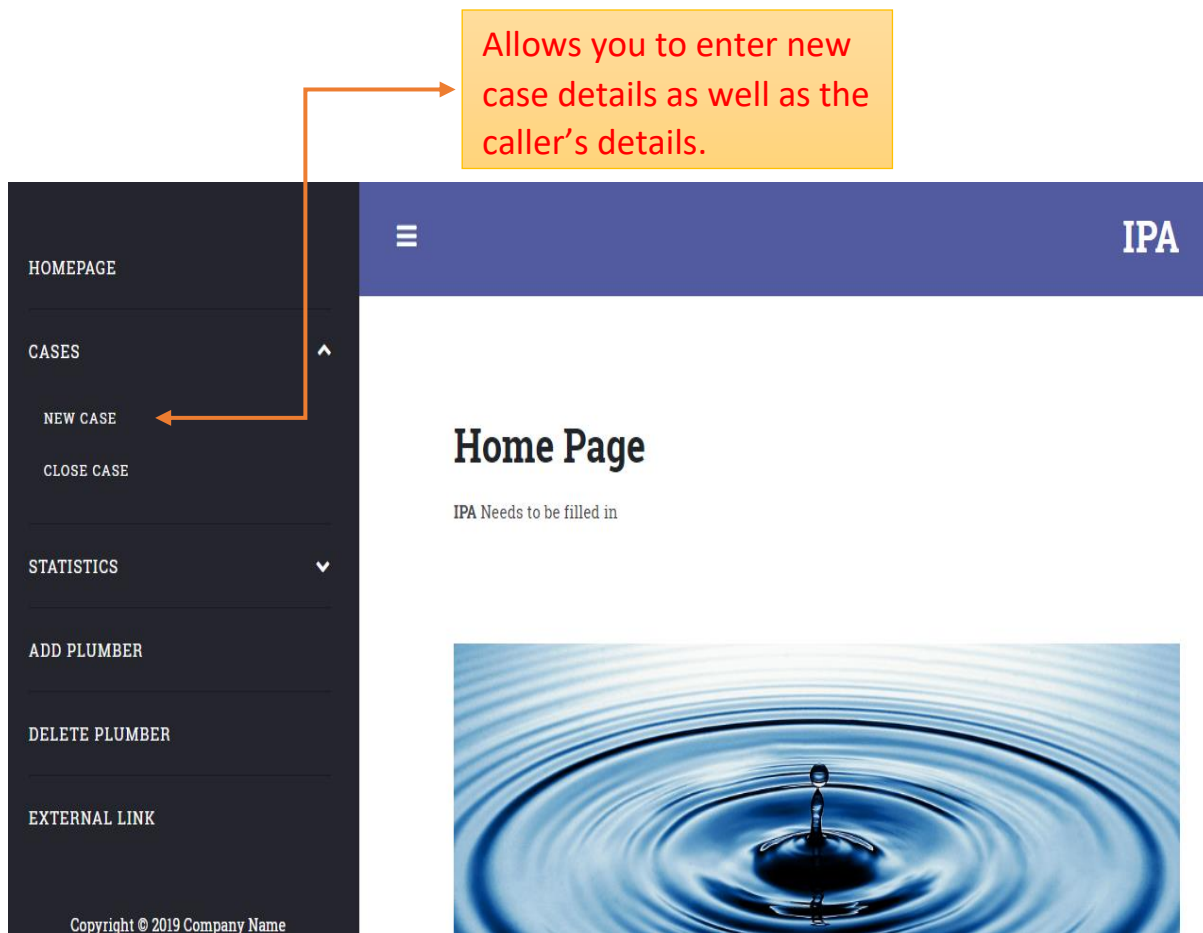
Navigation Bar

By clicking this button it will open up a navigation bar for you to choose the task you want to perform.



## Entering details of a new case

Allows you to enter new case details as well as the caller's details.

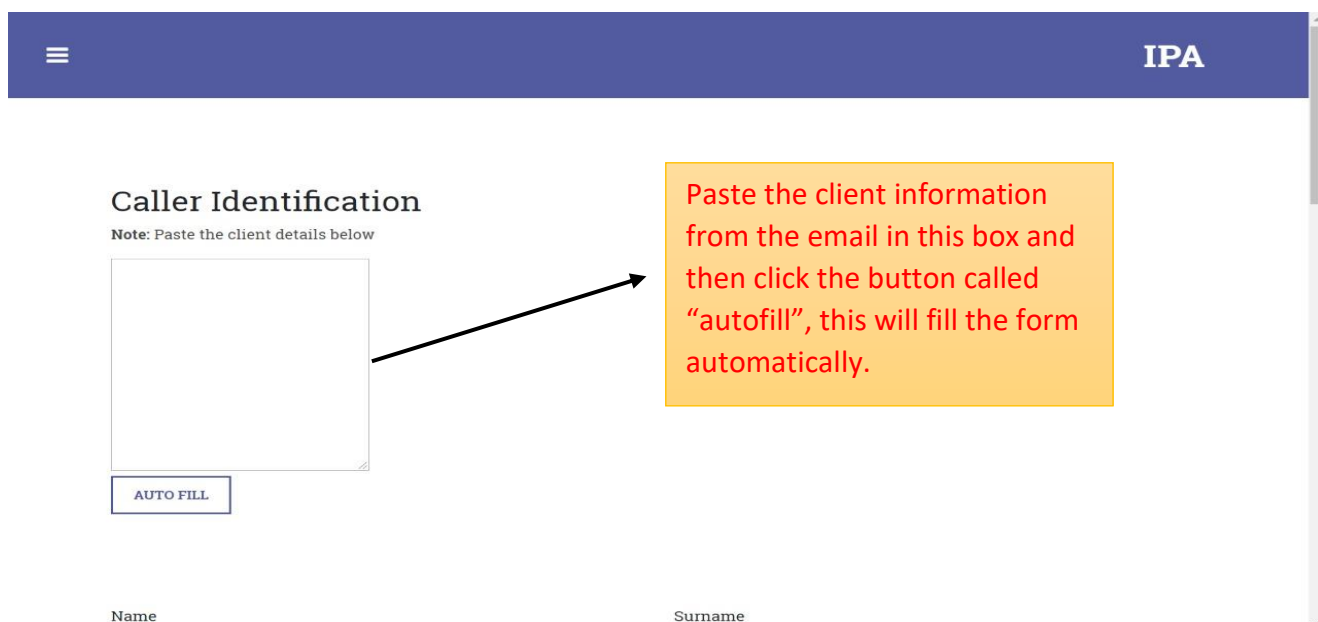


Home Page

IPA Needs to be filled in

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Below is the form to fill in the details related to a case.



Caller Identification

Note: Paste the client details below

Paste the client information from the email in this box and then click the button called "autofill", this will fill the form automatically.

AUTO FILL

Name Surname





Name

Surname

Address

Cell Number

Call back number

Client Type

Service Type

Reason

## Generating Case Report

Case ID

Caller ID

GENERATE CASE ID

GENERATE CALLER ID

Incident Date

Case Description

GET CURRENT DATE

Case Status

completed



Case Status

completed

Plumber ID

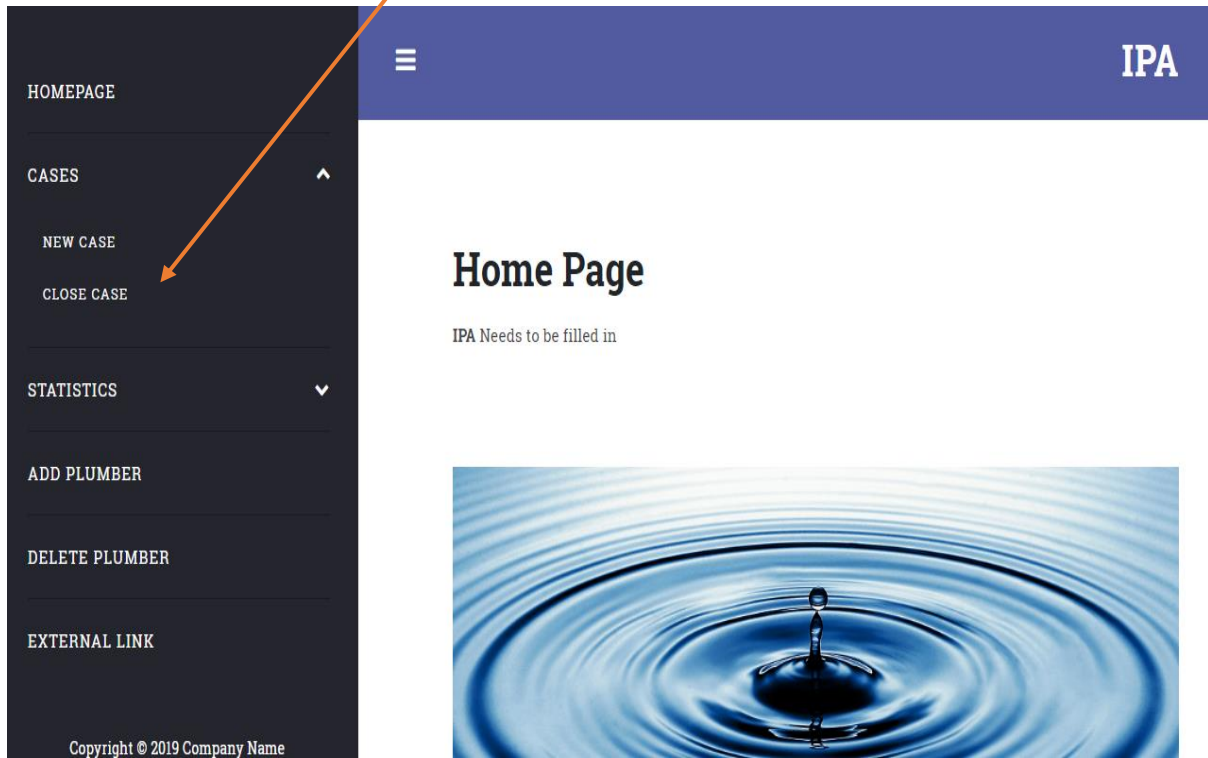
Case Opened by (Agent ID)

SUBMIT


Enter your ID (choose from the dropdown).

## Closing a case

⇒ To close a case click here:



By clicking on the “view cases that needs to be closed “ button , a list of cases will be displayed that needs to be closed and then enter you agent ID in order to close it. Below is an example as how to close a case/cases.

IPA

Close a Case

VIEW CASES THAT NEEDS TO BE CLOSED

Case Closed by (Agent ID)

CLOSE THE CASE

When “view case that needs to be closed” button clicked a list of cases are shown:

VIEW CASES THAT NEEDS TO BE CLOSED

completed	EvBS20Xy	2019-7-7
completed	F2DY21YD	2019-7-7
completed	MzicGUKq	unknown

Case Closed by (Agent ID)

CLOSE THE CASE

⇒ Choose your agent ID from the drop down and click submit.

completed	EvBS20Xy	2019-7-7
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completed	F2DY21YD	2019-7-7
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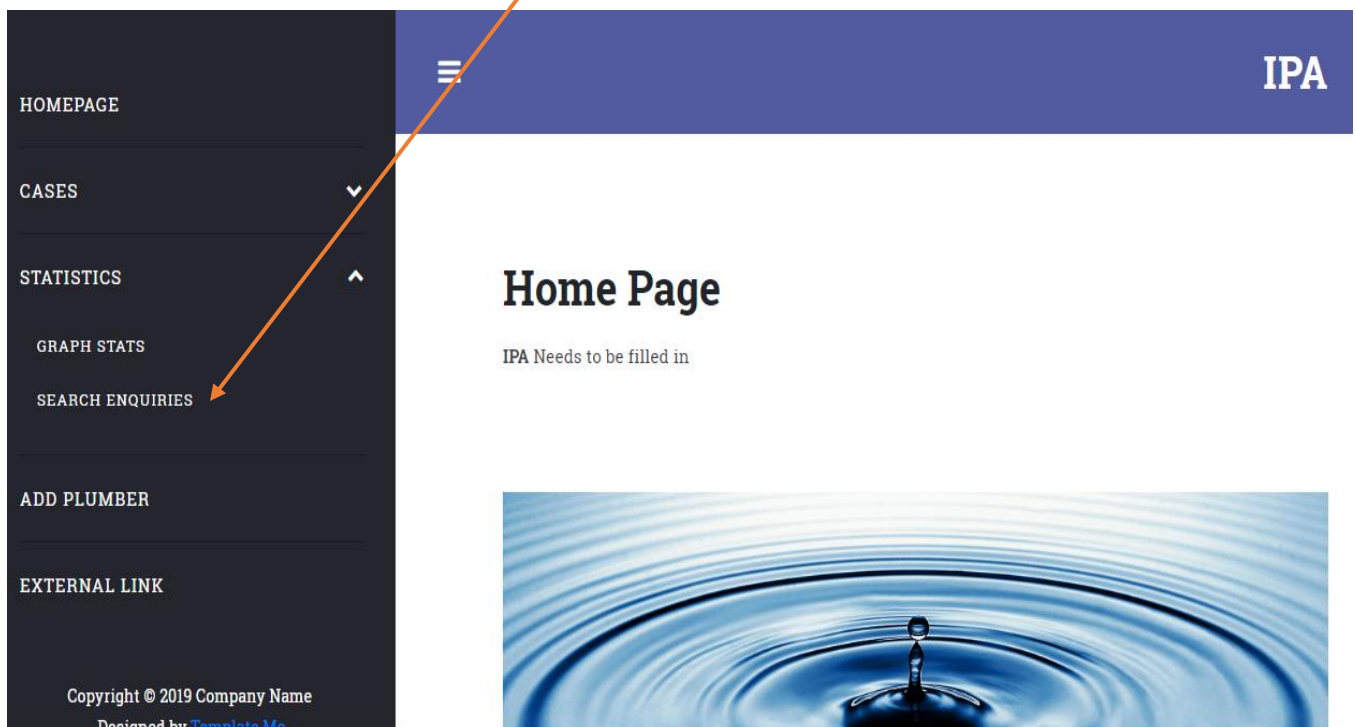
completed	MzicGUKq	unknown
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Case Closed by (Agent ID)


CLOSE THE CASE

### Searching for cases handled by a specific plumber

⇒ To perform search functionality click here:



Enter the plumber's ID to get details on the cases handled by a specific plumber.



## Search based on various features

Cases done by plumber:

SEARCH

clear

## Tables

CaseID	Incident Date	Address	Case Status	Description	Caller ID	Agent O	Agent C
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Example of searching for case handled by plumber ID 24DhAjwRbi

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### Search based on various features

Cases done by plumber:

SEARCH

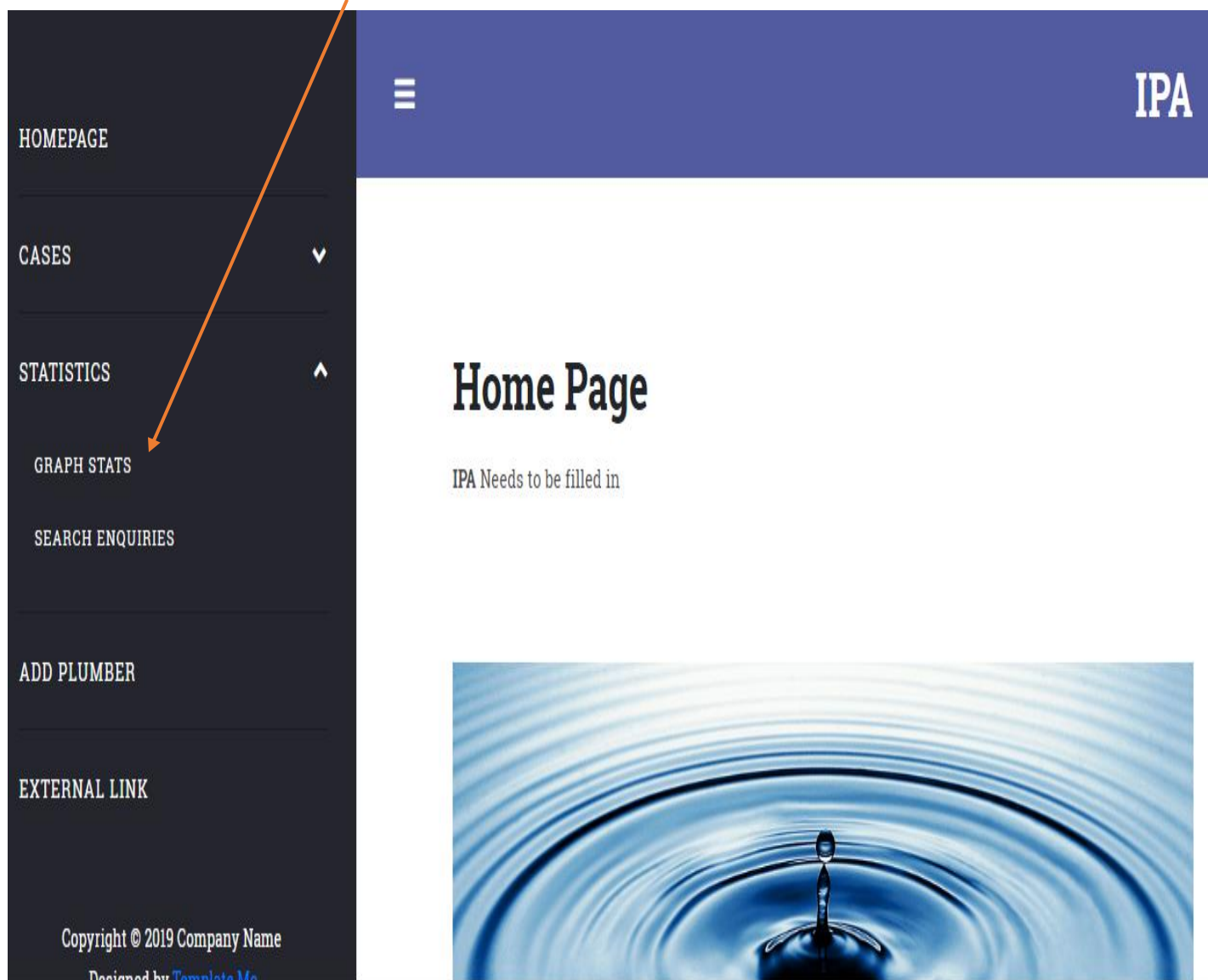
clear

Tables

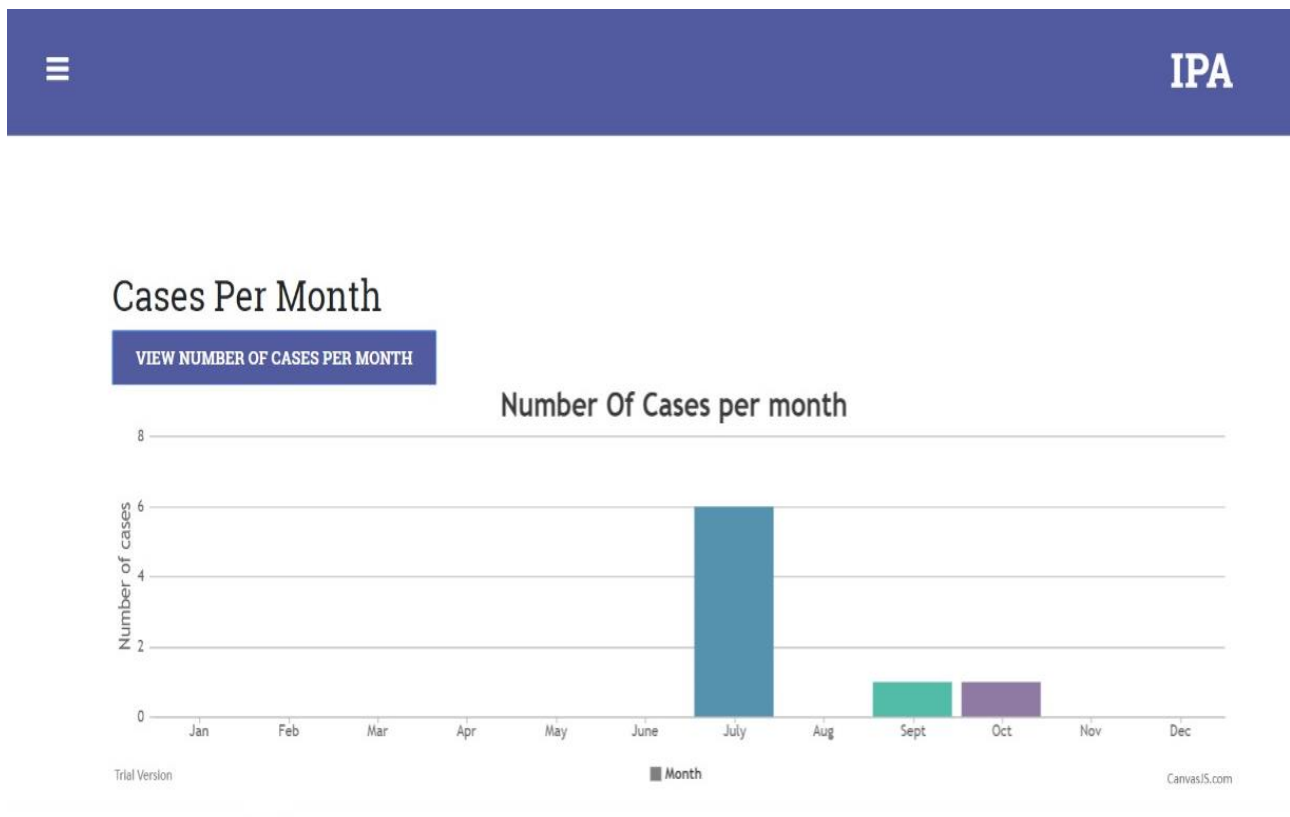
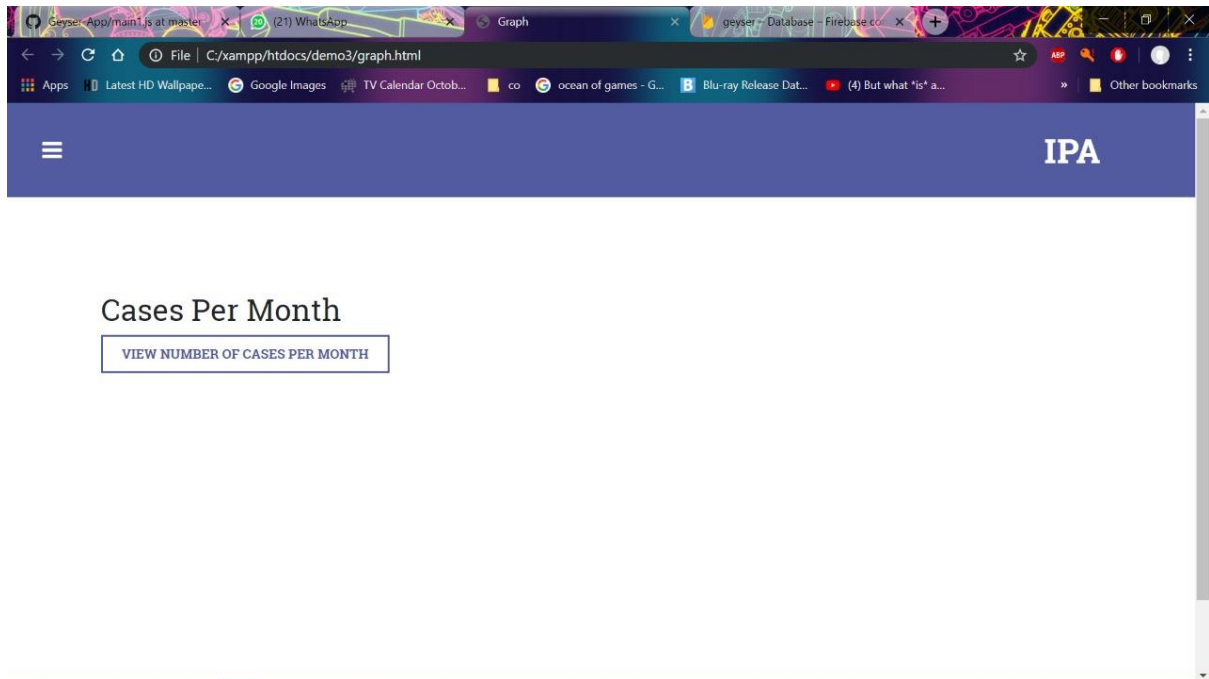
CaseID	Incident Date	Address	Case Status	Description	Caller ID	Agent O	Agent C
EvBS20Xy	2019-9-9	The Fields, Burnett Street, Hatfield, Pretoria, 0028	completed	Same as the reason above	UgEgyuNW	ARvCV6mlk	ARvCV6mlk
MzicGUKq	2019-7-8	1104 Prospect street, Hatfield, Pretoria 0028	completed	Burst valve	ng2bbEEB	AXJXoxUcT	unknown
jAqMKs7W	2019-7-7	House No 1456, Legabe street, unit 4	pending	Same as the reason above	uaWQeEOl	AXJXoxUcT	unknown

## Statistics

To view Statistics, click here :



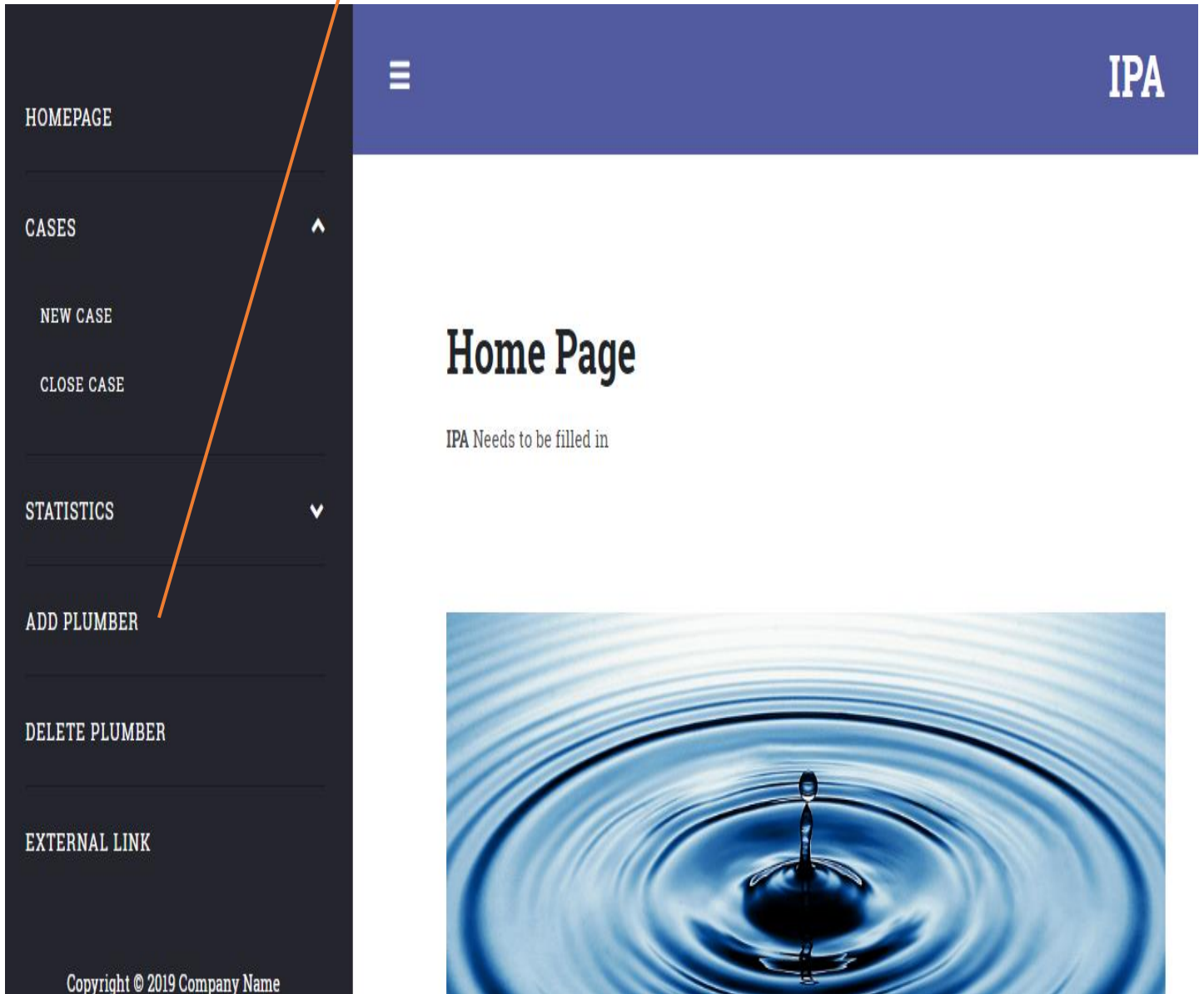
Click on the button called “view number of cases per month ” to get an overview of the cases handled per month.





## **Adding a new employee**

To add a new employee click here.





## Add New Plumber

**Note:** Plumber's details can be copy-pasted below from the CV else you can manually type it out

AUTO FILL

Name

ID number

Cell Number

Address

Plumber ID

Plumber Password

GENERATE PLUMBER ID

GENERATE PLUMBER PASSWORD

Attach CV

Choose File

No file chosen

Attach ID copy

Choose File

No file chosen

Attach other supporting documents

Choose File

No file chosen

SUBMIT

Click on choose file to upload supporting documents of the new employee.

## Deleting an employee

In order to remove an employee's records from a database, insert the plumber's ID .

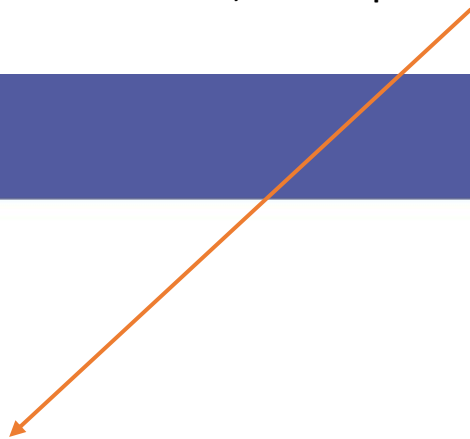


### Removing a Plumber

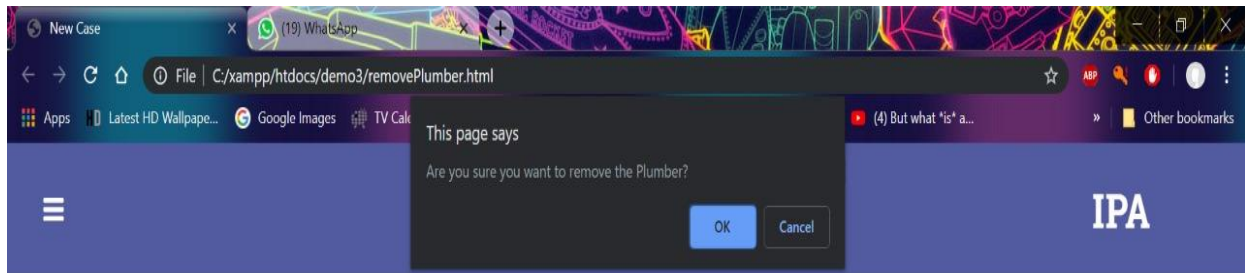
Insert Plumber ID to remove

DELETE

clear



### ***Example of deleting an employee's record from the database.***



#### **Removing a Plumber**

Insert Plumber ID to remove

DELETE

clear

Confirmation message before deleting an employee's record. If you think you have entered the wrong plumber's ID then click on cancel else click on ok.

### **Troubleshooting**

Error messages will appear if required fields that need to be filled in have been left blank. In this instance an error message in red will appear underneath the required field. This occurs when filling in case details, new employee's details, login and sign up page. This can be avoided by filling in the required fields.