# AGENT INSURANCE RENEWAL

**Description:**

The renewal date of your insurance policy is based on the date on which your policy was took. Using this app, the agents can notify the clients through E-mail or SMS regarding the unpaid (pending) amount and acknowledge them regarding the renewal process. System gathers the common functionalities to be implemented for agents and direct customers for payments details.

The existing system of insurance renewal mostly are on webpages and apps. All the apps are third party company application and apps acts as a broker or an intermediate in insurance renewal. The existing application does not include insurance renewal calculation based on the current GST prices.

Proposed system:

* The system is to be built with KOTLIN, and Firebase for database.
* It calculates the renewal amount with respect to Government updates.
* Provide SMS and Email notification based on the expiry of the renewal date.
* Generate a renewal notice with Included taxes, no claim bonus and other commissions.
* Payment will be done to the Insurance company with the help of the agent.

**Technology details:**

Android studio - kotlin , BACKEND using Firebase

**Screen details:**

Common screens like Login & Dashboard will be done as a general process.

1. Client Details
2. Policy Number filter
3. Email/SMS alert
4. GST calculation
5. Payment
6. **Client Details**

Here we need to gather client information in firebase as below; the same are stored in MST\_CLIENT table.

Client Name

Contact Type: Individual / Business

**Controls for Individual category:**

New IC No

DOB

Gender

Occupation

**Controls for Business category:**

Business Reg No

Type of Business

Contact Person

**Common controls**

Address

Mobile Number

Tel. No

Email

1. **Policy Number filter details** 
   * If insurance to be processed, we need to give coverage details of whether Individual or Business client details to agent display.
   * If Policy Number is typed individual client details are to be displayed, then allow Single coverage under coverage type and under ‘Insured Details’ section, client details from ‘Client screen’ will be shown by default.
   * It can include multiple insurance with single policy number by clicking ‘Add More’ option.

Policy Type:

Policy Issue Date

Inception Date

Expiry Date

Coverage Type: Single Coverage / Business

1. **Email/SMS details**

The proposed system is designed for Agents who has a list of policy data from which the Renewal Notice can be generated and sent to the respective client. The client can receive the notice via Email or SMS. The renewal notice contains all the details of the policy along with the No Claim Bonus, Agent Commission, and other taxes with respect to the Government.

It will alert the client 30 days before going to be expired.

1. **GST Calculation**

It will Calculate bill amount based on current GST with percentage 5%. It will also calculate the additional insurance amount under the same client policy number detail. This calculate amount also Sent to the client through Email/SMS alert and also including agent Commission.

1. **Payment details**

Using the payment gateway agent can pay the Insurance company. In another way client can pay the renewal amount directly in this application.

**MASTER TABLES:**

1. **MST\_CLIENT**

NUM\_CLIENT\_ID NUMBER(10) [PK]

VCH\_CLIENT\_NAME VARCHAR2(250)

VCH\_NEW\_IC\_NO VARCHAR2(12)

DTT\_DOB DATE

CHR\_GENDER CHAR [M / F / O]

NUM\_OCCUPATION\_ID NUMBER(10)

VCH\_BUSSINESS\_ REG\_ NO VARCHAR2(12)

VCH\_BUSINESS\_TYPE\_DESC VARCHAR2(200)

VCH\_CONTACT\_PERSON VARCHAR2(250)

VCH\_ADDRESS VARCHAR2(500)

VCH\_MOBILE\_NUMBER VARCHAR2(20)

VCH\_EMAIL VARCHAR2(100)

1. **MST\_COVERAGE\_TYPE**

**Data to be:** Single Coverage / Business Coverage

NUM\_COVERAGE\_TYPE\_ID NUMBER(10) [PK]

VCH\_ COVERAGE\_TYPE\_DESC VARCHAR2(100)

CHR\_STATUS CHAR [Y / N]

1. **MST\_OCCUPATION**

NUM\_OCCUPATION\_ID NUMBER(10) [PK]

VCH\_OCCUPATION VARCHAR2(200)

VCH\_STATUS CHAR [Y / N]

**TRANSACTION TABLES:**

1. **TRN\_NM\_QUOTATION**

NUM\_QUOTATION\_ID NUMBER(10)[PK]

CHR\_POLICY\_TYPE CHAR [A / S ]

DTT\_POLICY\_ISSUE\_DATE DATETIME

DTT\_INCEPTION\_DATE DATETIME

DTT\_EXPIRY\_DATE DATETIME

NUM\_EX\_COVERAGE\_AMT NUMBER(10)

NUM\_ EX\_COVERAGE\_PREMIUM NUMBER(10)

NUM\_SERVICE\_TAX\_AMT NUMBER(10)

NUM\_SERVICE\_TAX\_ID NUMBER(10)

NUM\_SERVICE\_TAX\_PECENT NUMBER(10)

NUM\_CLIENT\_ID NUMBER(10)

VCH\_INSURED\_NAME VARCHAR2(250)

VCH\_NEW\_ IC\_ NO VARCHAR2(20)

DTT\_DOB DATE

NUM\_ AGE NUMBER(3)

CHR\_GENDER CHAR [M / F/ O]

**UNIT TEST CASES:**

Explain the unit test cases to be applied for each screen & also the validations for each control. Provide the end result details for the system.

For Example:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Test Case Id** | **Scenario** | **Steps** | **Test Data** | **Expected Results** | **Actual Results** | **Pass / Fail** |
| 1 | Login with valid Data | 1. Goto Portal Login screen 2. Enter Username & password 3. Click Signup | Username: Admin  Password: admin@123 | Dashboard page to be displayed on successful login | As expected | Pass |
| 2 | Login with valid Data | 1. Goto Portal Login screen 2. Enter Username & password 3. Click Signup | Username: Admin  Password: dfgdgfdsf | Dashboard page to be displayed on successful login | Error shown as ‘Wrong Username / Password’ | Fail |