

## **Functional Requirements of Customer Policy Dashboard**

### **Objective**

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The objective of the system is to create a platform that enables insurance company admins to efficiently introduce, update, and manage their policies. It aims to provide users with the ability to easily view and purchase policies from the available options. Additionally, the system will track and maintain a list of purchased policies for each user, ensuring transparency and accessibility of their policy information. By fulfilling these objectives, the system aims to streamline policy management and enhance the user experience in the insurance domain.

### **Features Supported in Application**

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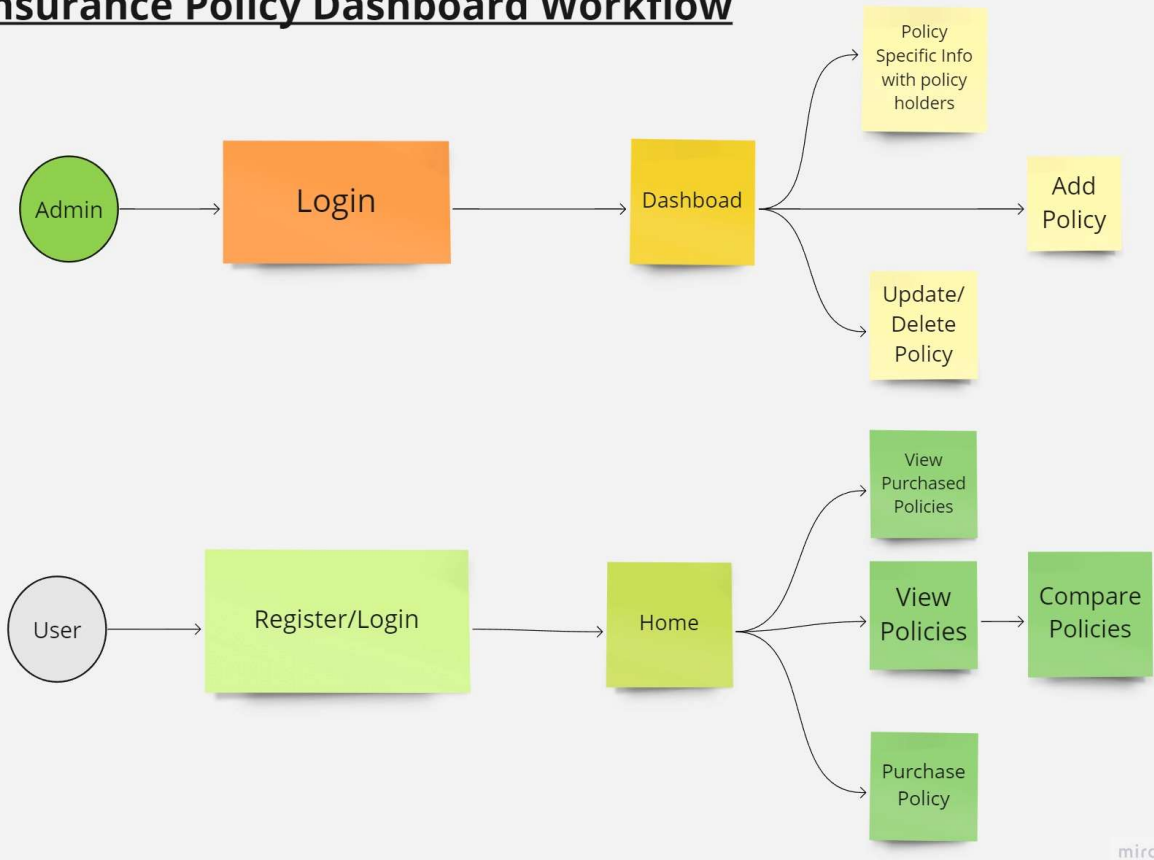
#### **Functions available for Admins are as follows:**

1. Add an Insurance Policy
2. View the list of policies under him/her
3. Update/ Delete Insurance Policy

#### **Functions available for Users are as follows:**

1. View his/her purchased policies
2. View other policies
3. Can compare 3 different policies at same page
4. Purchase the policy

## Insurance Policy Dashboard Workflow





## Features for Admin:

*Login > Dashboard > Policy Specific Info with policy holders*

*OR*

*Login > Dashboard > Add policy*

*OR*

*Login > Dashboard > Update/ Delete Policy*

On the policy dashboard page provided for the admins, a list of policies available will be displayed in a tabular form. Each row will contain general information about each policy. Here admins can introduce a new policy and can update the existing policy.

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Field Name	Description
Add Policy	Allows the admins to add a new policy.
Update/ Delete Policy	Allow the admin to update or delete the policy.
Policy Specific Page with Policy Holders	Display all the information about the policy and policy holders Information.

## To Operate on the Policy:

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1. To **Add a Policy**, select the **Add** option in the dashboard.  
All the related fields will appear on the screen as a form which has to be filled.
2. To **Update/ Delete a Policy**, select the **options** filed with respect to the policy in the dashboard.  
OR  
Click the policy to **Update/Delete** then click the **options** filed in that page.
3. Click and then click **View** the policy.  
Detailed information about the policy and list of policy holders as a table having name, email, starting and ending date of policy, premiums paid/ remaining, date of next premium will be displayed.

Click **Back to Dashboard** to navigate back to the dashboard



## Features for Users:

*Register/Login > Home > View Purchased Policies*

*OR*

*Register/Login > Home > View Policies*

*OR*

*Register/Login > Home > View Policies > Compare policy*

*OR*

*Register/Login > Home > Purchase Policy*

When the user logs in to the application, user will be displayed with the home page. From here user can find different policies available and can purchase a specific policy by navigating to it or also can view and compare similar policies available.

From the home page user can go to his/her dashboard to view purchased policies. Where different fields related to it will be displayed.

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Field Name	Description
View Dashboard	Display a list of purchased policies by that user.
Available policies to buy	Displays the list of policies which can be purchased.
Policy Specific Page.	Display all the information about the policy.
Compare Policy in the Viewed Policy Page	Display similar category policy to compare the pros and cons.
Purchase Policy	Allow user to purchase the policy.

## User's Interactions:

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1. To **View the Dashboard**, click **Dashboard** option. This will take the user to dashboard, where list of purchased policies and their respective fields like name of the policy, next premium date & amount, start date, end date, etc will be displayed.
2. To view the **Available policies to buy**, user can find a policy best suited for him/her.



3. Click the specific policy to **View Detailed information** about the policy.
4. User can **Compare related Policies** in one of the interested policy specific pages.
5. To **Purchase the Policy**, user need to click **Purchase** button, which will ask for the confirmation, click the **Confirm** button to confirm the purchase.

Policy specific page will contain all the necessary information as entered by the admin will be displayed.

Click **Back to Home** to navigate back to the Home.

Click **Logout** to logout.