**CRM**

**All Customers**

Get customer id

Displays Customer details: policy id, customer id, agent no, Mcare no, start date, name, phone, premium

**Pseudocode**

Begin

Get customer Id

Fetch and display the customer details

{Policy id, Customer id, Agent no, Mcare, Start date, Name, Phone no, Premium}

End

**Edit Customer**

Get customer id

Fetch Customer’s Details: customer id, start date, payment mode, total premium, loan amount, Mcare id, loan id, status, expiry date, marital status, next of kin, next of kin phone, next of kin physical address, preferred MSP, user city, postal address, physical address, user location, profile photo, id photo

Update customer’s details

If action Save?

If action Reset?

If action Delete?

Save Changes

Revert back to original form state

Delete the record

Changes saved successfully

Record deleted successfully

Attach association

**Pseudocode**

Begin

Get query id

Fetch and display customer’s query details by the customer session id

{customer id, start date, payment mode, total premium, loan amount, Mcare id, loan id, status, expiry date, marital status, next of kin, next of kin phone, next of kin physical address, preferred MSP, user city, postal address, physical address, user location, profile photo, id photo}

Edit any customer query details displayed

If (action is save

Update the customer query record

{customer id, start date, payment mode, total premium, loan amount, Mcare id, loan id, status, expiry date, marital status, next of kin, next of kin phone, next of kin physical address, preferred MSP, user city, postal address, physical address, user location, profile photo, id photo}

Update the customer query and display the related message)

Else

If (action is delete

Delete the customer query record from the system and display the related message)

Else

(Action is reset

Revert to the original form state)

End if

End if

End

**All Agent**

Get agent id

Displays Agent’s details: customer id, name, phone no

**Pseudocode**

Begin

Get Agent Id

Fetch and display the Agent details

{customer id, link RO, link champion, Link Super-Champion, profile photo}

End

**All ROs**

Get Ro id

Displays ROs details: Ro id, customer id, name, phone

**Pseudocode**

Begin

Get Ro Id

Fetch and display the ROs details

{Ro id, customer id, name, phone}

End

**All** **Champions**

Get champion id

Displays champion details: champion id, customer id, name, phone no

**Pseudocode**

Begin

Get champion Id

Fetch and display the champion details

{champion id, customer id, name, phone no}

End

**All** **Super** **Champions**

Get super champion id

Displays champion details: champion id, customer id, name, phone no

**Pseudocode**

Begin

Get super champion Id

Fetch and display the super champion details

{super champion id, customer id, name, phone no}

End

**All** **MSPs**

Get MSP id

Displays champion details: MSP id, customer id, name, phone no, MSP type

**Pseudocode**

Begin

Get MSP Id

Fetch and display the MSP details

{MSP id, customer id, name, phone no, MSP type}

End

**All Association**

Get association id

Displays association details: MSP id, customer id, name, phone no

**Pseudocode**

Begin

Get association Id

Fetch and display the association details

{Association id, customer id, name, phone no}

End

**Search Masterfile**

Enter either the first name, surname, middle name

Search

Displays Masterfile records

**Pseudocode**

Begin

Insert the search parameter {surname or firstname or middlename}

Display the related Masterfile records

End

**Add New Masterfile**

Enter afyapoa role, surname, first name, middle name, status, email, id number, start date, link RO, link champion, link super champion, phone, customer type, MSP type, select image, user role

Successfully Added Masterfile Details

Records Masterfile details

**Pseudocode**

Begin

Insert new Masterfile {surname, first name, middle name, id/passport, gender, bs role, image}

Save Masterfile details and display the related process messages

If (business role is client

Insert customer details {phone number, email, customer type}

Save the customer details and display the related process messages)

Else

If (business role is staff

Insert staff details {email, phone number, department, job, user role, username, password, status, details}

Save the staff details and display the related process messages)

Else

(Business role is agent

Insert agent details {email, phone, user role, username, password, details}

Save the agent details and display the related process messages)

End if

End if

End