Understanding Document

For

Insurance Policy Endorsement

(ePES)

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| Prepared by/Modified by | Role | Date of preparation |
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1. **Description:**

This Project provides facility to customers to update personal details and upload the necessary documents.

* 1. **Functionalities**:
* Search Policy Details.
* View policy Details.
* Update Personal Details.
* Upload Supporting Documents.
* View Endorsement Status.
  1. **Logic**
* The customers details are updated and documents are uploaded and if that are valid admin approves it if not admin rejects it.

1. **Customer Details** **Considered:**

Customer Id.

Customer Name.

Customer Age.

Customer Date of Birth.

Customer Gender.

Nominee Name.

Nominee Relation.

Habits.

Address.

Telephone Number.

Premium Payment Frequency.

Policy number.

Product Line.

Product Name.

1. **Functionalities:**

* Search Policy Details

This functionality allows customers to search a policy by using policy number, Customer Id or Name and DOB Combination. On clicking search Button the policy details should be displayed in a gridview on the same screen .The grid view records should be clickable and on click the policy details should be open in editable format.

* View Policy Details

This functionality allows to view the policy details that should be in editable format using controls like TextBox, Radio Button etc. The displayed details are Policy Number, Product Line, Product Name, Customer Name, Customer Age, DOB, Gender, Nominee and Relation, Smoker/non Smoker, Address, Telephone Number, Premium Payement frequency. The fields Product Name, Policy Number, Product Line, Product Name should be non-editable.

* Update Personal Detail.

This functionality allows to modify particular Customer Details.

When a customer clicks update button in the view page, he will be redirected to the update page, where he can modify that customers details. The modified details are again validated. If found valid, then the details are updated with the modified values. If any field is invalid, then proper messages are displayed.

* Upload Supporting Documents

This functionality allows to upload supporting documents. Customer should enter the customer id and can browse the document which he want to upload and by clicking the insert button the document can be uploaded.

* View Endorsement Status

This functionality will allow the customer to view the status (i.e) whether the uploaded documents is approved by the admin or rejected. Customer will enter the Customer id and can view the status.