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Sales Management Portal

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SALES MANAGEMENT PORTAL

By

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B.A., Governors State University, 2012

GRADUATE CAPSTONE PROJECT

Submitted in partial fulfillment of the requirements

For the Degree of Master of Science,

With a Major in Computer Science

Governors State University
University Park, IL 60484

2016

ABSTRACT

Majority of the insurance companies offer policies that include automobile insurance, home or rental insurance, life insurance, health and disability insurance, annuity insurance, and business insurance. New customers and clients are being rerouted to different agents assigned to different insurance categorized departments, whether on the phone or on the website. To avoid this complex situation and the loss of clients, the construction of a web site database portal will be very resourceful. The pipeline database portal will allow all company employees to have access to all the customers and client information, such as their profile, history, and policy information. By enhancing the employees access, the portal will portray a thorough breakdown of each prospects/client's information, including the authorization to add/edit/delete/update option.

The requirements that would need to be established is obtaining the software, applications, and developer tools. The computer science language that will be mostly focused on in this project will be C# language. A detailed schedule has been prepared to breakdown the process to complete the project in timely manner. Implementations will take effect on a weekly basis to successfully perform the website portal after all the data has been collected, combined, inputted, programmed, tested, and executed.

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1 Introduction

Many customers have the questions that only a customer service representative can answer those questions. Sometimes, the representative might not have all the answers to the customer's questions, especially when it relates to their profile. The representative has no choice but to reroute the customer to another representative. After continuously waiting on the phone line to speak to a representative, the customer would then again have to repeat the same routine while waiting for another representative to answer his or her question.

J'ME (pronounced 'J'aime' meaning the love in French) Insurance is an auto insurance company that has been founded in the year of 2016 in Illinois. The founder, CEO, and the establisher is none other than the web programmer herself, Jasmin N.H. Eid. Jasmin established the name herself, referring to her first name Jasmin, for the letter 'J', and her two amazing and wonderful angelic nephews that she is a second mother to, Mousa and Eissa, which stand for the letters 'M' and 'E'.

J'ME Insurance allows ALL members of the company to either view, update, edit, and/or delete information that are retrieved from the customers. It assures the residents of Illinois for the most qualified and reasonable premium available for anyone, regardless of their credit and history. Unlike the other competing auto insurance companies, J'ME Insurance reviews history dating back two (2) years while other companies review three (3), five (5), and even ten (10) years with penalty fees that will be added to the premium. Auto insurance is very difficult to everyone, especially when it comes to premium rates.

J'ME Insurance has constructed a website and a management portal to have customer assist themselves as well as be assisted by the professional and profound employees of J'ME Insurance where they do not need to be rerouted and instructed to redial another number. With the online assistance, the customers can be able to contact the company via phone, email, or by simply creating an account and submitting it into the database, where the well-trained professional agents will review the customer's submission and respond back with constructed policy detail within a 24-hour period.

J'ME is family owned and is willing to put their courtesy forward to assist the customers not just as prospects or clients, but as family members as well.

1.1 Project Description

The project is in terms of constructing a web portal that administrators, managers, employees, and technical support teams can access the website and the portal management page. Upon access, they will be authorized and authenticated to view, update, edit, and delete information that has been inputted into the system either by the management team themselves and/or new prospects and/or clients through the website itself. The project itself will require the construct of a website that is accessible for both visitors and the management team.

1.2 Competitive Information

With the advance technological programs and language, the project can be built using any type of software and any type of programming language. However, due to the limited provided materials and the accessibility to the software as well the intermediate knowledge of the programmer's previous educational skills, the project could have been easily constructed as the project had been constructed originally. However, the project would have probably contained a more graphical perspective than what the compatibility of the current software that was used towards constructing the website portal.

1.3 Assumptions and Dependencies

- Majority of the framework is designed to provide a broader view of the accessibility of navigating between one website page to another.
- The approachability of the project is providing the members the authentication and authorization privileges to be able to navigate the website in a user-friendly mode.

1.4 Future Enhancements

The project has been built using one software and a corresponding programming language. With the different types of software and the different programming languages, the project itself could have been advanced to a more well built in respect to the graphical interfaces as aside to the simplicity of the required tactics of the project itself.

2 Project Technical Description

The establishment of the website consists access to two types of members: visitors and managers. The visitors can navigate the website through seven (7) web pages. The management team can navigate the website through seven (7) as well. However, a few of those websites are only accessible to the management team as administrator logins. With the navigational hyperlinks, the members can reroute within the website if there is the availability of a stable and active networking service.

The websites provide the users to be able to input information, including registration to the website, logging in, and inputting their information. The information is in forms of creating new profiles, updating profiles in relation to the user's login information, which are not limited to personal information, driver history, vehicle information, and the chosen policy breakdown requirements. The information is then redirected to the connected database that obtains the inputted information and saved within the database, which is the SQL database module.

2.1 Risk Assessment and Management

Computer programming tends to have the highest risk in failure issues. One would be the software is possibility not compatible with the applications, depending the equipment the software is installed in. Another possibility is the breakdown of the equipment and/or loss of data. In this case, the difficult issue was trying to run Microsoft Access Application in the Visual Studio 2015 Enterprise Edition. However, there were some connectivity issues in regards to importing and exporting the data. The issue was resolved by reinputting the data in to the available SQL Database Module in the software program itself. Also, the equipment and the backup device was corrupted and all data was lost. With the extreme deadline was close by, the project was placed into 24-hour work as it required as much attention as possible until it was completed into due time. The best possible back up if the connectivity was strongly available was to submit it through one drive and it will save in the cloud, which this step was taken into high recommendation.

3 *Project Requirements*

The requirements are as followed:

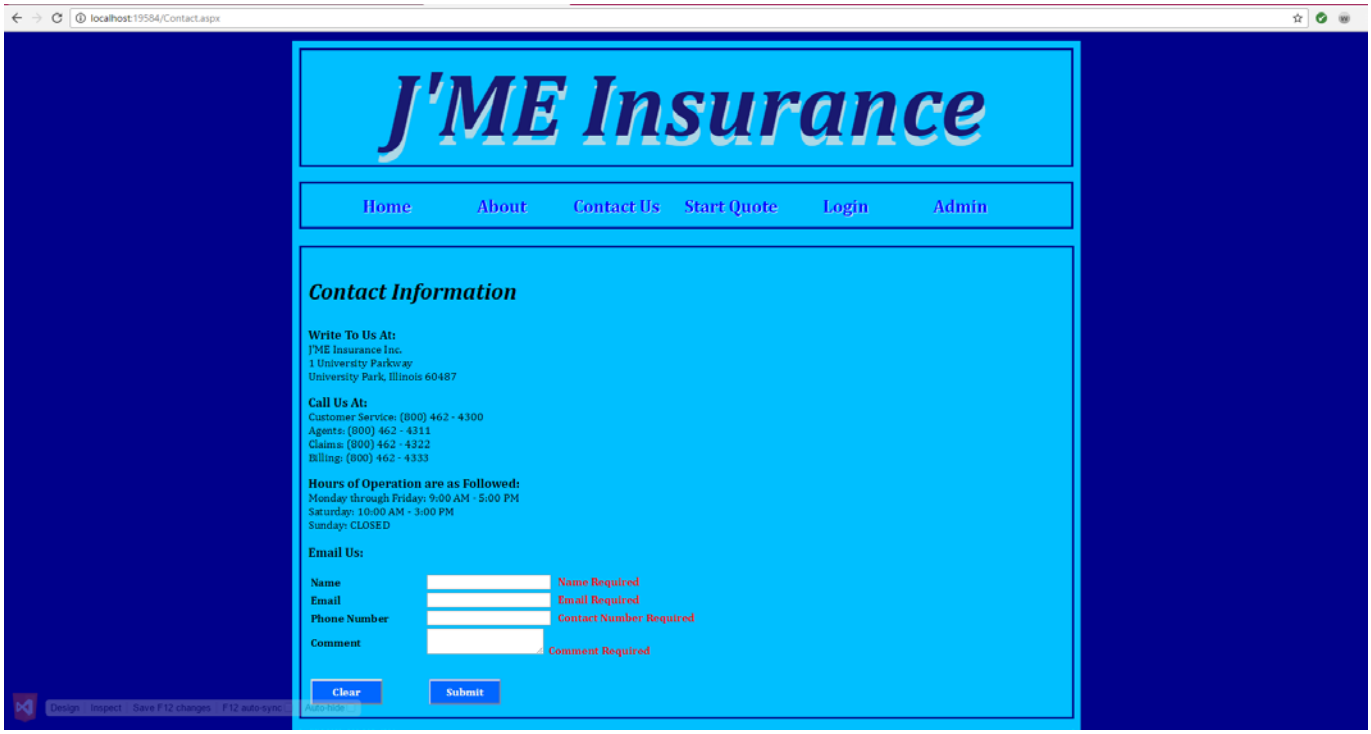
- Hardware Requirements
  - HP Intel Core i7 Laptop
  - 16 GB RAM Hard drive
  - 1TB Memory
  - 1TB External Memory Hard Drive (Passport)
- Software and/or Application Requirements
  - Windows 10 Operating System
  - Visual Studio 2015 Enterprise Edition
  - Microsoft Access and/or Oracle SQL Database Developer

4 *Design Units Impacts*

Main Website Page

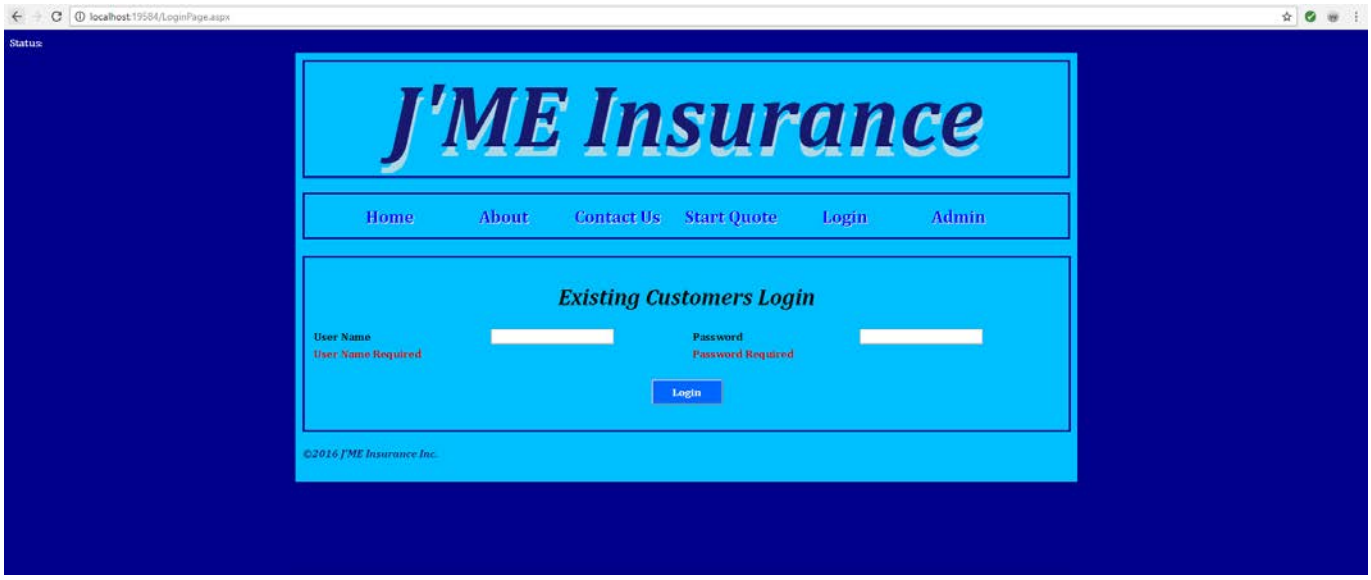
About Page

Contact Us Page

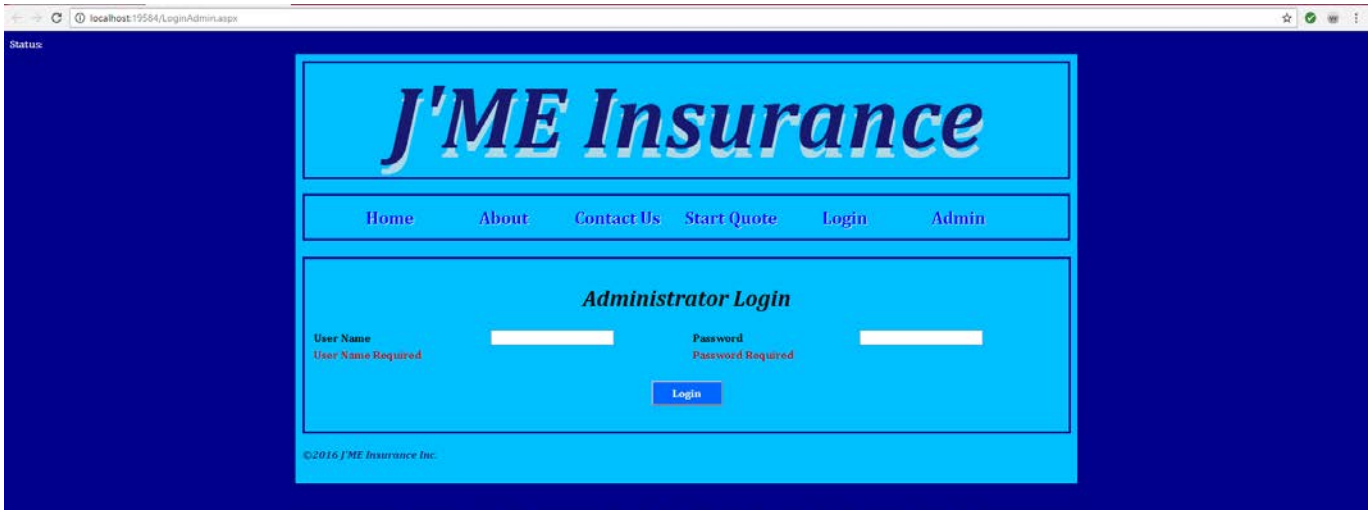


Start Quote Page (via Registration Page)

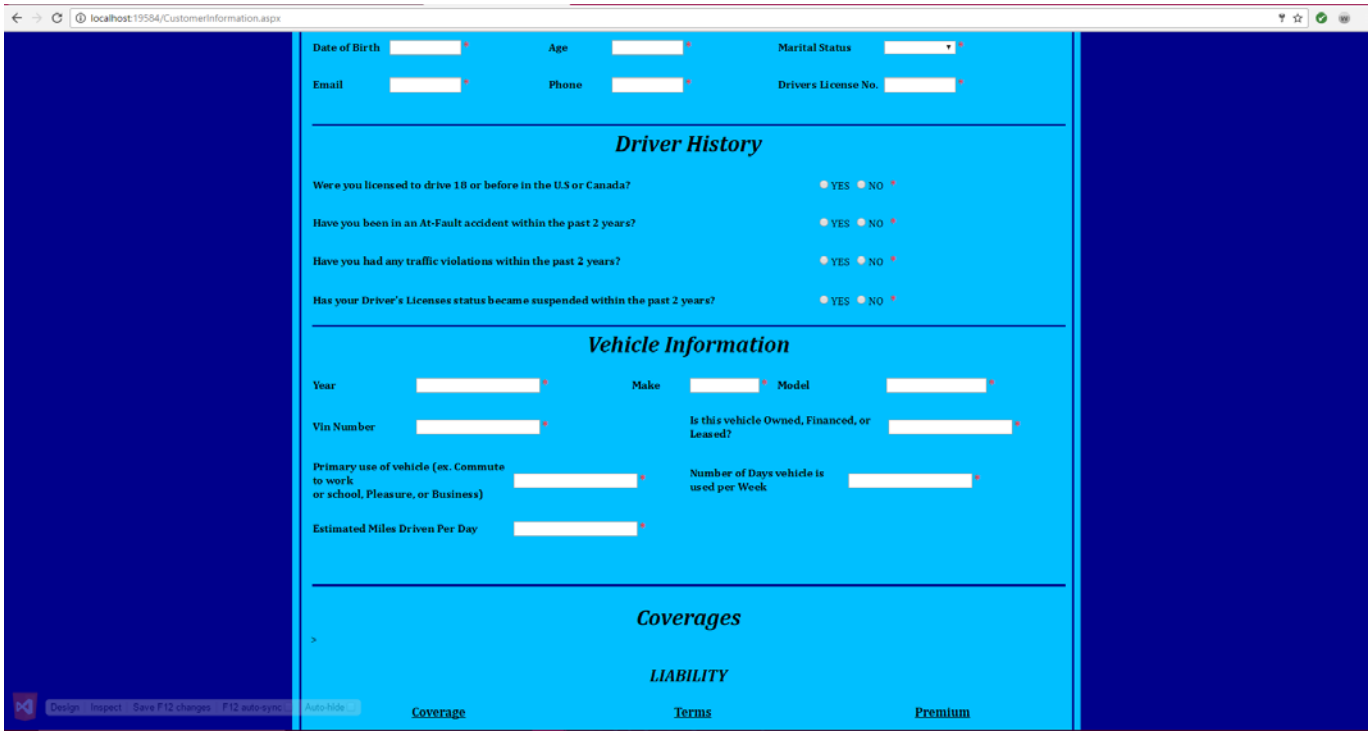
Prospect/Client Login Page

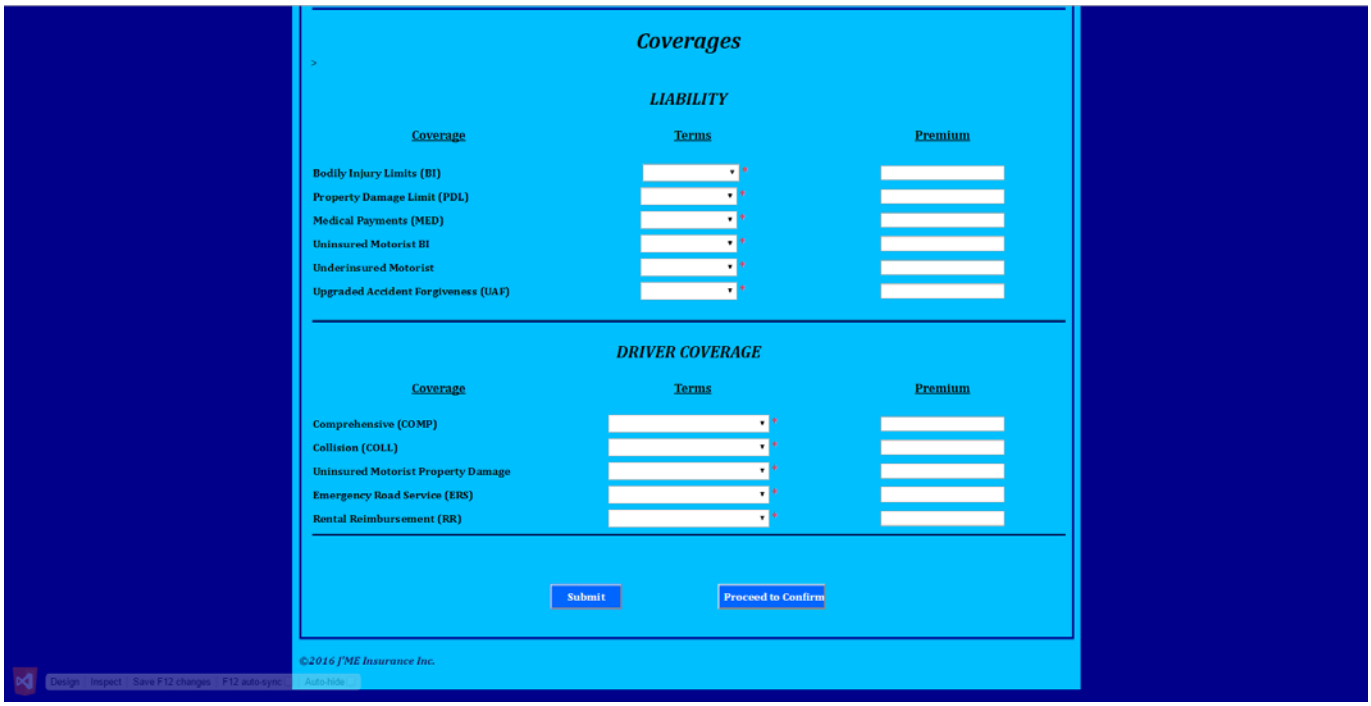


Admin Login Page

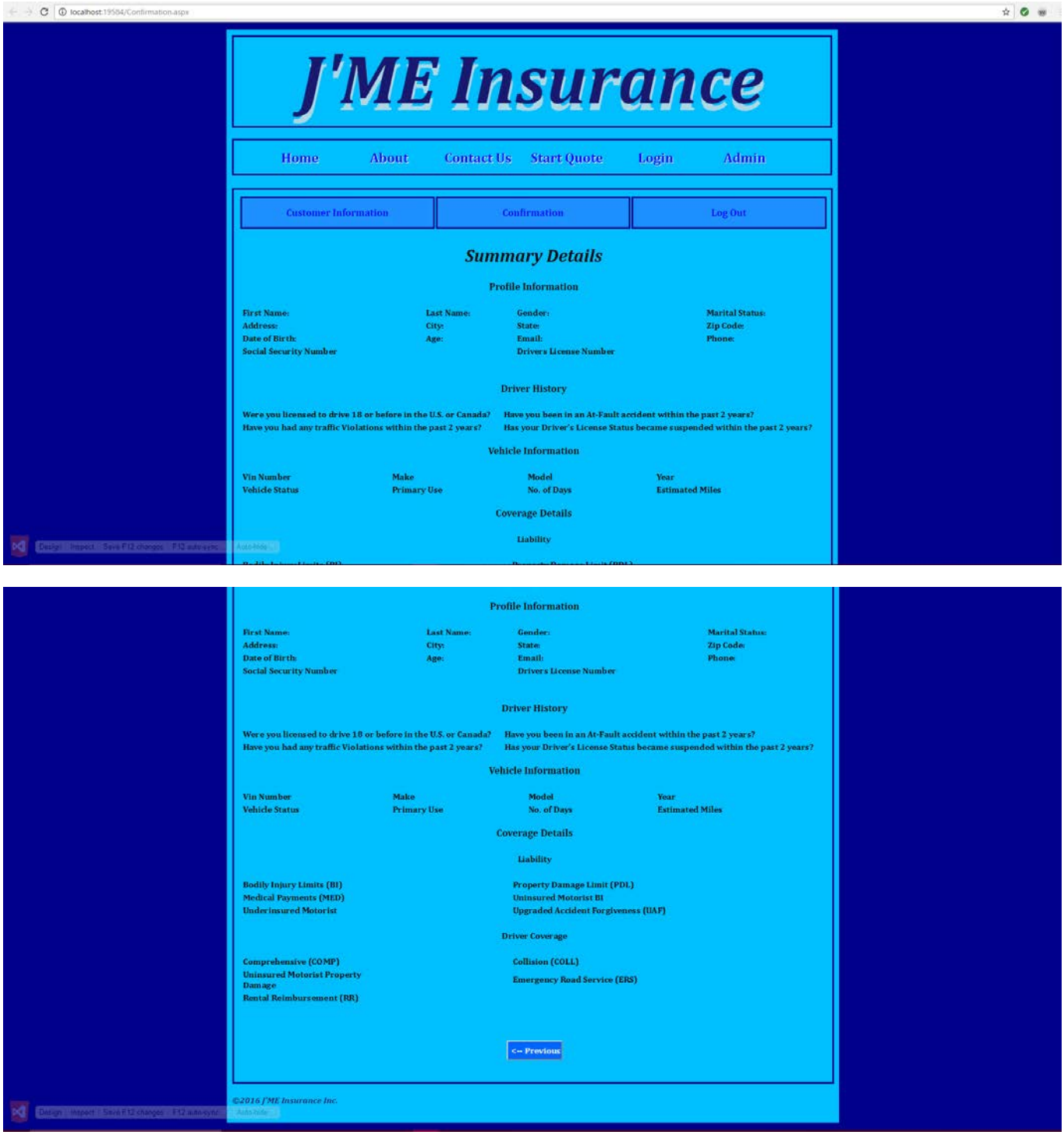


Customer Information Page (Post Login Page Redirection)

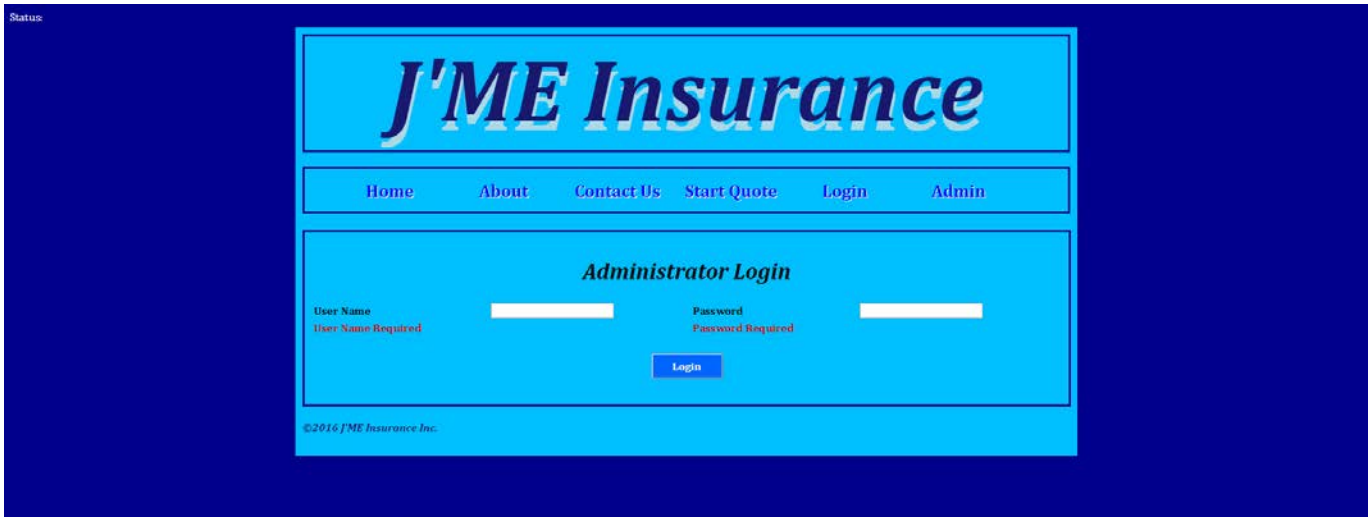

localhost:19584/CustomerInformation.aspx
Date of Birth
Age
Marital Status
Email
Phone
Drivers License No.
Driver History
Were you licensed to drive 18 or before in the U.S or Canada?
YES NO
Have you been in an At-Fault accident within the past 2 years?
YES NO
Have you had any traffic violations within the past 2 years?
YES NO
Has your Driver's Licenses status became suspended within the past 2 years?
YES NO
Vehicle Information
Year
Make
Model
Vin Number
Is this vehicle Owned, Financed, or Leased?
Primary use of vehicle (ex. Commute to work or school, Pleasure, or Business)
Number of Days vehicle is used per Week
Estimated Miles Driven Per Day
Coverages
LIABILITY
Coverage
Terms
Premium


Coverages
LIABILITY
Coverage
Terms
Premium
Bodily Injury Limits (BI)
Property Damage Limit (PDL)
Medical Payments (MED)
Uninsured Motorist BI
Underinsured Motorist
Upgraded Accident Forgiveness (UAF)
DRIVER COVERAGE
Coverage
Terms
Premium
Comprehensive (COMP)
Collision (COLL)
Uninsured Motorist Property Damage
Emergency Road Service (ERS)
Rental Reimbursement (RR)
Submit
Proceed to Confirm
©2016 JME Insurance Inc.

Customer Confirmation Page

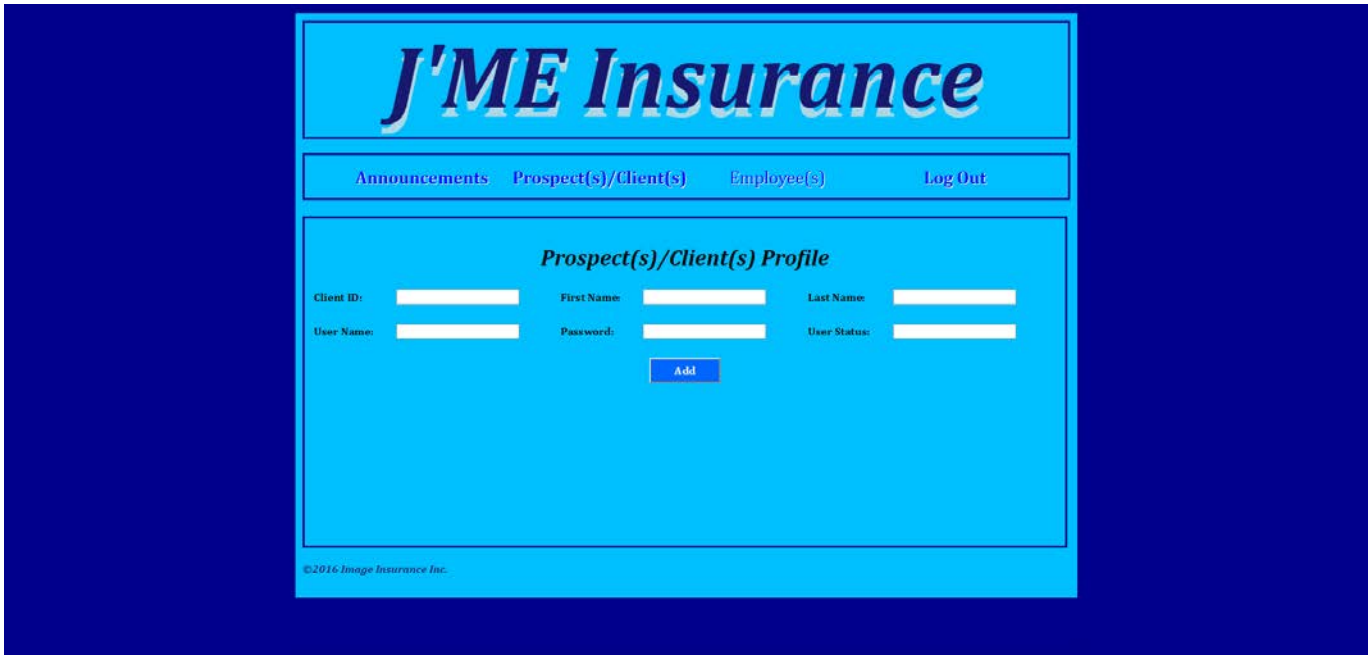


Administrator Login Page



Announcements Page (Post Admin Login Redirect)

Prospect(s)/Client(s) Management Page



Employee(s) Profile

5 Acknowledgements

I would like to take the time to thank the faculty advisors at Governors State University who have provided me with the educational knowledge and skills that have acknowledged me to reach the completion of my Master's Degree in Computer Science. The faculty team members are as followed:

- Dr. Steve Shih
- Dr. Xueqing Tang
- Dr. Soon Park
- Professor Alex Lui
- Professor Nelson Chen
- Professor Richard Manprisio
- Professor Aslam Shahid
- Professor Do Young Park

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- Mrs. Nancy Rios
- Mr. Bryce Johnson

Without your amazing and extravagant support, including your time, patience, assistance, and most outstanding love and care, I would not have had the strength and confidence to achieve the completion of this project in addition to completing my Master's Degree. I have strived to become as successful as I can and I have maintained my academic status beyond due to your outstanding provision in believing in me and giving me the chance to prove to you that your time has not gone to waste. I really do thank you with ALL my heart and with ALL my might. Until the day I move on past this world and into another one, I will NEVER EVER forget you.

I would also like to acknowledge my family members, especially my parents, who had complete faith in me, supported me both emotionally and financially throughout the rough times, and were very tolerable and

patient with me throughout all the ups and downs of completing this ultimate project. My family members are as follows:

- Huda K. Zahran-Eid (Mother)
- Naif M. Eid (Father)
- Mohammed N. Eid (Brother)
- Rima A. Ajeel-Eid (Sister-in-Law)
- Ali N. Eid (Brother)
- Omar N. Eid (Brother)
- Mousa M. Eid (Nephew)
- Eissa M. Eid (Nephew)

Thank you again for helping me complete this project and obtaining my Graduate Degree in Computer Science.