

# Business Ownership Policy Insurance Broker Portal

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## BizProtect

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**Position:** System Integration

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**Submitted To:** Ezhil Aparajit

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## 1. Introduction

This project aims to simplify the quoting process for business ownership policies (BOP) for small businesses. It provides a broker-only web portal where brokers can generate insurance quotes, manage them, and submit for approval. The system ensures an easy-to-use interface with modern features like real-time notifications, PDF generation, dynamic upgrade suggestions, and email integration.

## 2. Objective and Scope

- Create a broker-exclusive platform to streamline quote generation and submission.
- Enable secure access, easy navigation, and essential functionalities.
- Features include quote list, dynamic T&C, and broker earnings display.
- Scope: Broker-side modules including form, dashboard, notifications.
- Out of Scope: Admin panel and approval interfaces.

## 3. System Architecture

The portal is developed using Angular for the frontend and ASP.NET Core Web API for the backend. It utilizes JWT for secure authentication, a SQL database for persistence, and a rating API for premium calculation. The system is modular and scalable, with client-server communication via REST APIs.

## 4. Functional Features

- Broker Registration/Login
- Dashboard with income summary (2% commission)
- Create Quote with dynamic form and T&C
- View/Edit/Delete Quotes (limited access)
- Quote PDF generation
- Real-time Notifications
- Plan Upgrade Suggestions
- PDF Upload for Auto-fill
- Contact/About Pages with EmailJS

## 5. Technical Details

The project follows a component-based Angular structure for UI with backend logic implemented in ASP.NET Core. JWT ensures secure route access. Premium is calculated using an external API. Socket-based alerts or polling strategies enable real-time notification updates.

## 6. Innovation and Creativity

- Autofill using PDF Upload
- Upgrade suggestion with price difference and benefits
- Stylish UI using neumorphism
- Route protection for authentication
- Flow-oriented navigation and access management
- Notifications
- Auto email send using Email JS
- Download detail of quote in PDF format

## 7. Assumptions

- Only broker access is required.
- Admin functionality is outside the scope.
- Office network restrictions prevent direct backend emails.
- All submissions happen securely and are broker-initiated.

## 8. Future Scope

- Develop an admin dashboard for quote management.
- Implement group chat between brokers and admin.
- Extend real-time functionality across components.
- Add payment gateway for instant policy purchases.



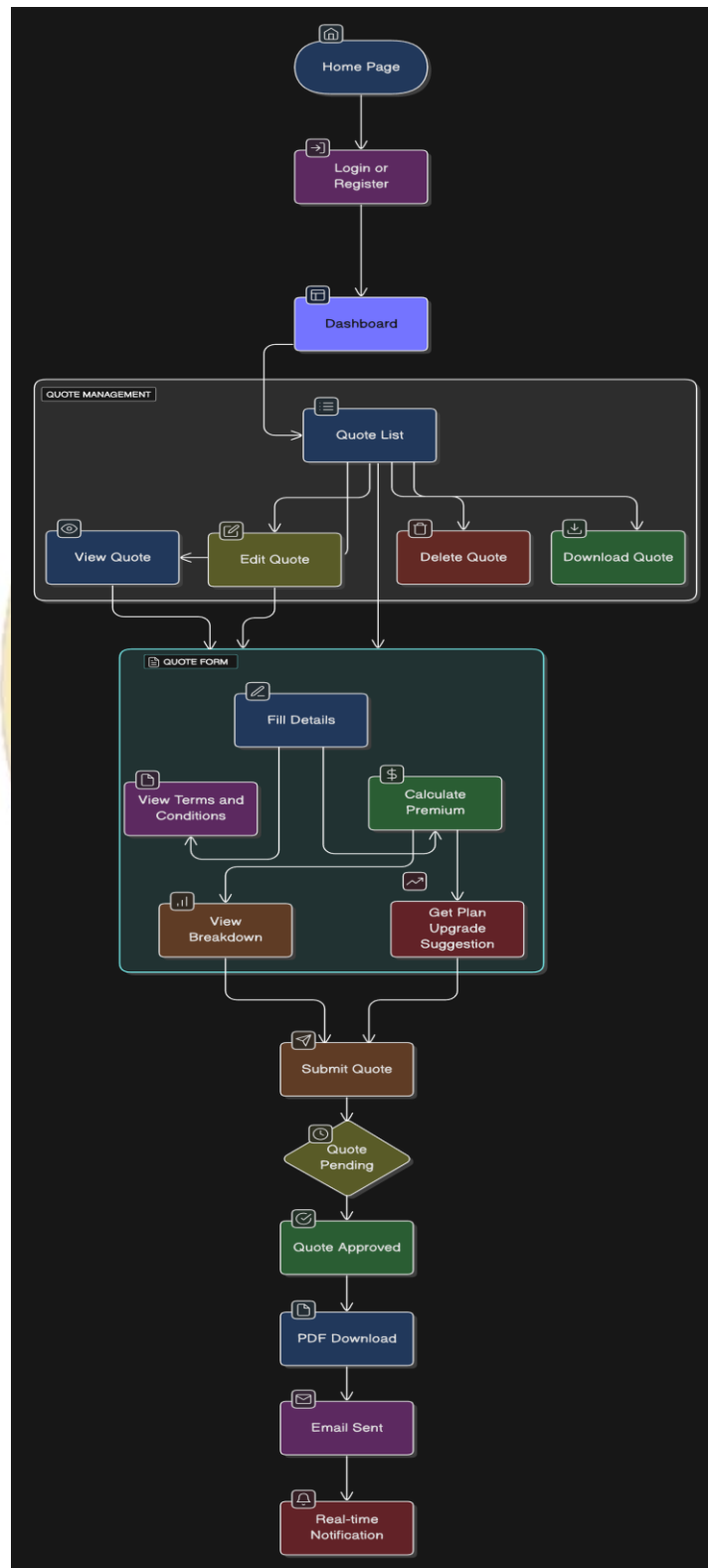


Figure1.1 Flow Diagram of BizProtect

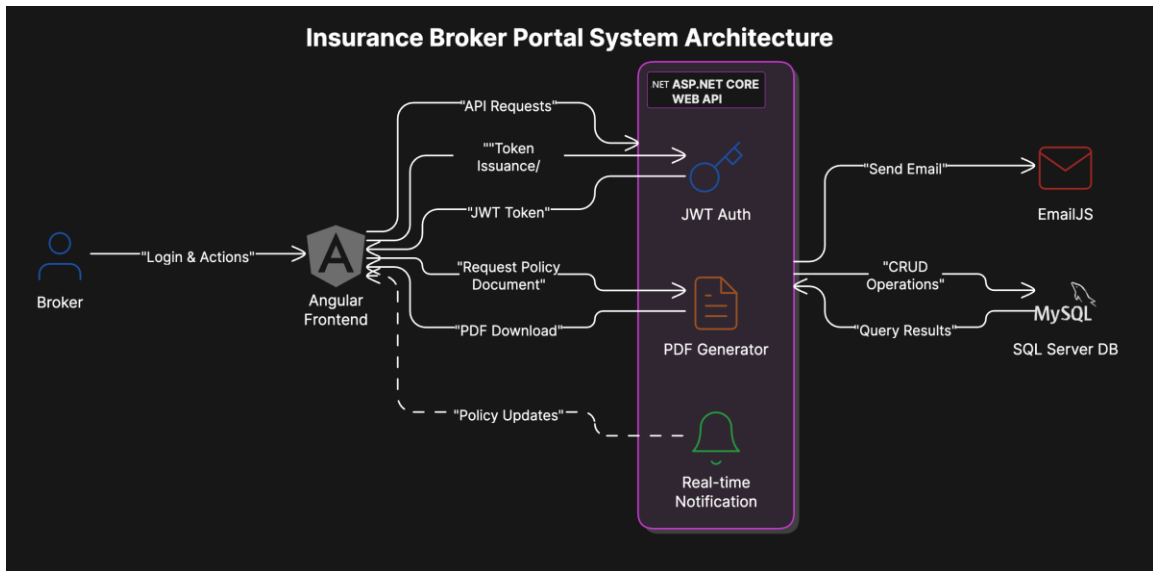


Figure 1.2 Architecture Diagram of BizProtect

