

**UNIVERSITY OF PUNE**

A PROJECT REPORT

ON

**LIC MANAGEMENT FOR LIC AGENTS**

**Submitted By**

**Mr. Anand Achha. Mr. Pushkaraj Rokade.**

**(Roll No-02) (Roll No-132)**

**Seat No:13624 Seat No: 13702**

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**Introduction**

* **Introduction to system**
* **Scope of the system**
* **Proposed System**

**Introduction**

**Agents Work - : Give Information about insurance plan to customer.**

**LIC company and Agent Activities: -**

1. LIC company Create agent .Gives knowledge about product to agent.
2. Agent gives information about product to customer.
3. Do further things according to contract.
4. Gives all information to customer about their due date and maturity dates .

5 ) If policy laps loss for all people. so we want to give alert to

customer and it is I duty of LIC agent and LIC also.

|  |  |
| --- | --- |
|  |  |

Scope of System

The System is Computerization of LIC agents work.

The Scope of the System mainly includes:

1. **Agents data is not uptodate and not secure.:** All paper work is include.
2. **Give Brief detail of policy to customer:**

In that we gives brief detail of every plan . So Agent can give best product to his Customer according to his need . And Customer can also easily understand.

1. **Caculate Premium :**

We calculate aproximatly premium .

1. **Customer is Agree :**
2. **At that time :**

We accept all details of customer and his policy.

1. **After specific time he needs that:**

We just accept detail so can contact him after some time.

1. **Save in database n gives Information about his policy:**

Save Database so we can easily get all information about all customer . And some monrtary details like paid value , loans etc

1. **Alerts:**
2. Customer who takes policy -: we give information about due dates , matuarity dates ,death claims.
3. **Agent profit and commission:**

Gives his mothly , yearly income of agent . Which plans are doing well.

**Proposed System**

1. Integration Customer and plan into a proper system.
2. Providing Policy details upon the customer requirments
3. To manage various type of master data.
4. Give right policy according to need.
5. To provide current details about Policy.
6. To maintain various important information about customer and his policy.
7. Expand business and customer satisfaction
8. To generate various reports in standard format.

## Existing System Description

The Existing System was unorganized and complex considering the manual work performed.

All the work of agent etc. was maintained on paper.

1. In the manual System, the customer gets information about policy by agent only oraly.
2. Premium calculation done by tables of TP on paper.
3. In this field you want remember all due dates of all customer which take policy
4. And we want to contact with customer who wiiling to take policy.
5. Then want to give information to customer and alert but it is time consuming .
6. Agent also want to remember or do paperwork about commission . so he can understand how he is getting .
7. Agent data is not secure plus not uptodate .

#### Problems in Existing System

Though the manual working is fine and details are properly maintained, there are some problems

1. There is a lot of information like details related policy,alert, commission , due dates , claims etc. so agent cant give full information so loss of business
2. Gives information is very difficult to maintain and contact.
3. There is a lot of paper work involved in the existing system.

On computerization of the system, the paper work is reduced.

4 There is need of agent to know how business is doing about his commission

Fact Finding Techniques

To design any system it is necessary to have adequate information about the system.

In order to obtain this information following fact-finding techniques are used.

### Review of Existing Documents

Existing documents are collected and properly studied for insights into actual working and flow of the process and also the formats in which the documents are required to be generated.

### On site Observation

Actual observation of the operations of the organization gives a clear picture and the exact scope of the business.

### Interviews and Discussions

First hand information regarding the problems in the existing system, the objectives and the expectations from the new system was obtained by interviewing the concerned management persons.

**Analysis**

* **Feasibility Study**
* **Hardware & Software Requirement**

**Feasibility Study**

The Feasibility Study is useful to evaluate the cost and benefit of the system requested. The Feasibility Study tries to anticipate future scenarios of software developments.

There are 3 major aspects considered in Feasibility Ftudy.

1. **Technical Feasibility:**

The system uses Visual Basic 6.0 for its front-end development and MS-Access 2000 for storing data. The organization has machines ranging from Pentium II to Pentium IV processors with windows based operating systems such as Windows 95,98,2000. No extra hardware or software support is required for processing or installing the system.

2. **Economical Feasibility**

As no extra Hardware or Software setup is required no additional cost is incurred. Hence the system is economically feasible.

1. **Operational Feasibility**

It is considered regarding acceptability of the System. The management and staff are willing to support, use and operate the proposed system.

**Result:**  In all these levels of feasibility study, the proposed system is feasible to begin

**Hardware and Software Requirements**

**Hardware**

Processor Intel 486

RAM 64 KB

HDD 2.1 GB

Floppy Drive 1.44 MB

CD-ROM 42 X

**Software Requirement**

Front-End Tool Visual Basic 6.0

Back-End Tool MS-Access 2002-2003

Operating System Windows98/2000/xp/Vista/Windows

**Data Dictionary (Database Structure)**

**Data Dictionary (Database Structure)**

1. **Policy Information Database**

|  |  |
| --- | --- |
| **Field** | **Datatype** |
| Policy\_Number | Number |
| Policy\_Name | Text |
| AgeSpan\_Min | Text |
| AgeSpan\_Max | Text |
| TermYears\_Min | Text |
| TermYears\_Max | Text |
| Max \_Maturity\_ Age | Text |
| Modes(yrly\_hyrly\_Qtly\_mnthly\_SSS) | Text |
| SA\_Min | Text |
| SA\_Max | Text |
| Rebate(yrly\_hyrly) | Text |
| Medical(NM\_GEN\_NM\_SPL) | Text |
| Loan(PL-HL) | Text |
| Term\_Rider | Text |
| Critical\_Illness\_rider | Text |
| DAB | Text |
| PWB | Text |
| Revial | Text |
| Survival\_Benifit | Text |
| Maturity\_Benifit | Text |
| Female\_Catag | Text |

1. **Premium Database according to plan**

|  |  |
| --- | --- |
| **Field** | **Datatype** |
| Age | Number |
| Premium | Number |

1. **Customer Database table**

|  |  |
| --- | --- |
| **Field** | **Datatype** |
| Customer\_Number | Number |
| Customer\_Name | Text |
| Contact\_Number | Text |
| Email\_Id | Text |
| Date\_Of\_Birth | Date/Time |
| Type | Text |
| Alert\_Days | Date/Time |

1. **Policy Customer Database**

|  |  |
| --- | --- |
| **Field** | **Datatype** |
| PolicyCustomer\_Number | Number |
| Customer\_Number | Number |
| Customer\_Name | Text |
| Policy\_Number | Number |
| Policy\_Name | Text |
| Term | Number |
| Premium | Number |
| DOC | Date/Time |
| Mode | Text |
| Maturity\_Date | Date/Time |
| Maturity(SA+Bonus)Amount | Number |
| Nominee\_Name | Text |
| Nominee\_Contact\_NO | Text |
| Customer\_Add | Text |
| SurvivalBenifit | Text |
| plan\_no | Number |
| DOB | Date/Time |

1. **Calculated Commission Database.**

|  |  |
| --- | --- |
| **Field** | **Datatype** |
| Commission\_Number | Number |
| C\_Date | Date/Time |
| PC\_Number | Number |
| Commission | Number |

**6) Commission Database**

|  |  |
| --- | --- |
| **Field** | **Datatype** |
| Commission(Plan\_Number) | Number |
| 1year | Number |
| 2and3rdyear | Number |
| Remaining | Number |

**ReportsReports**

1. In first report the agent gets all the information about policy customer such as return and dues .
2. In second report the agents gets all the information about Customer and he gets follow up report of particular customer .
3. In third report the agent gets all information such as commission on various policy
4. In forth report the agents gets Birth day dates of all customer

**Advantages & Limitations**

**Future Enhancement**

**Bibliography**

**Thank you.**

**0th Level DFD**

**1 st Level DFD**