**PRASIDHI FINANCIAL SOLUTIONS**

Project Report submitted in partial fulfilment of the requirements for the award of the degree of

**BACHELOR OF COMPUTER Science (BSC)**



Submitted by:

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**DEPARTMENT OF COMPUTER SCIENCE & APPLICATION**

**CERTIFICATE OF COMPLETION**

This is to certify that the project entitled **PRASIDHI FINANCIAL SOLUTIONS** has been satisfactorily completed by **ANJANA RAJESH (20CMS01)** in partial fulfilment of the award of the Bachelor of Computer Science degree requirements prescribed by St Joseph’s College Bengaluru during the academic year 2022 - 2023.

Guide Signature Head of the Department



**DECLARATION**

I, **ANJANA RAJESH (20CMS01**) hereby declare that the project work entitled PRASIDHI FINANCIAL SOLUTIONS is an original project work carried out by me, under the guidance of ***Dr Puneeth Kumar B S and Dr Hubert Shanthan***. This project work has not been submitted earlier either to any University / Institution or any other body for the fulfilment of the requirement of a course of study.

**Acknowledgement**

The success of the project depends upon the efforts invested. It is my duty to acknowledge and thank the individuals who has contributed in the successful completion of the project.

I take this opportunity to express my profound and whole hearted thanks to **Rev. Fr. Dr.Victor Lobo SJ , Principal, St. Joseph’s College**, **Bangalore** and **Rev.Fr. Denzil Lobo SJ** , **Director** , **St. Joseph’s Institute of Information Technology (SJIIT)** for providing ample facilities made to undergo my project successfully.

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**ABSTRACT**

Prasidhi Financial Solutions is a SEBI Registered Investment Advisor and Fee only Financial Planner based out of Bangalore. They provide financial services to the customers in need. We have created a website for providing information of the financial planning services and other statutory details. The website will allow customers who require financial advice to understand and know the working of Prasidhi Financial Solutions. It also allows the customers to study the type of service that they require for the problem that they are facing.

A customer who is willing to be a client can register their details and login to choose the service they require. After filling in all the details they can view the invoice and then they will be redirected to the payment page. For any further enquiry, the client can contact the advisor for help through the contact details provided.

The advisor will be able to view the registrations made and can fix an appointment for the same. The advisor or admin is given the privileges to make changes in the website as well as the database. The advisor will be able to view the services selected by the clients through the database.

This documentation contains the entire details on the project.

**INDRODUCTION**

**PROBLEM DEFINITION**

Prasidhi financial solution is a SEBI Registered Investment Advisor and Fee only Financial Planner. They offer holistic financial planning solutions to people at all wealth levels to achieve their financial goals. Though they are based out of Bangalore, their services are offered over the web across the world.

Our website gives information about the financial advisor and the services he provides. The website consists of a SEBI disclosure section. This section shows the details about any complaints against the advisor and his services. This was a static page needed to be made dynamic by having a table in database through which the admin or advisor can make the necessary changes which will be reflected in the website.

Clients can browse through the website and decide the services they require. The website needed a customer onboarding platform through which he/she fills the required details and makes payment to become a client.

The advisor should also be able to view the registered clients to schedule appointments. He should also have the privilege of making changes in the database and the website if desired.

**SCOPE OF THE PROJECT**

* Creating user login
* Develop design concepts for the new pages like login, invoice, payment.
* Developing a dynamic SEBI Disclosure table
* Create a responsive design so that clients can register their detail with ease
* Creating admin login so that he can view the registered clients
* Conduct user testing to ensure the new design meets usability requirements

**OBJECTIVES**

* To create a platform where people can reach the finance firm online and be able to select the services they require.
* Have a customer on-boarding platform where the customer can enter their details and will directly be added to the customer database. This will include the customer contact details through which the firm can contact the customer.
* Understand how the customer gets to know about the firm as this will help to increase the awareness of the firm.
* Get pan card and address proof details as documents for identity confirmation by the firm.
* To know whether the potential client is a KYC compliant, to know the service which he/she is joining for and the fee payable by him/her.
* Generate invoice according to the services chosen.
* Redirecting to payment page
* To make sure admin has access to make changes in the website and view the registered clients.

**REQUIREMENT SPECIFICATIONS**

**HARDWARE**

* Processor: The website can run on a standard processor like Intel Core i5 or higher, or equivalent AMD processor.
* Memory (RAM): A minimum of 4GB of RAM is recommended. However, for better performance, it is recommended to have at least 8GB of RAM.
* Storage: The website itself may not require a lot of storage space. However, depending on the number of documents and the expected traffic, storage requirements may vary. It is recommended to have at least 50GB of storage for a basic website.
* Network Interface Card (NIC): A Gigabit Ethernet NIC is recommended to ensure fast and reliable connectivity to the internet.
* Power Supply: A reliable and stable power supply is necessary.

**SOFTWARE**

* Text Editor: A text editor like Sublime Text, Atom, or Visual Studio Code to write and edit the HTML, CSS, JavaScript, and PHP code.
* Web Browser: A modern web browser like Chrome, Firefox, or Safari to preview and test the website.
* Apache Server: An Apache server to host and run the PHP code on the backend. Apache is an open-source web server software that can be installed on most operating systems.
* MySQL Database: A MySQL database server to store and manage data on the backend. MySQL is a free, open-source database management system that can be used with PHP.
* PHP Framework: A PHP framework like Laravel, CodeIgniter, or Symfony can be used to speed up the development process and simplify common tasks like routing and database access.
* CSS Pre-processor: A CSS pre-processor like Sass or LESS can be used to write CSS code more efficiently and with better organization.
* JavaScript Library: A JavaScript library like jQuery or React can be used to add interactive features and improve the user experience.
* Version Control: A version control system like Git can be used to track changes to the code and collaborate with other developers.
* Development Environment: A local development environment like XAMPP or MAMP can be used to test the website on a local machine before deploying it to a live server.

**DEVELOPMENT TOOLS / TECHNOLOGY**

1. Integrated Development Environments (IDEs): IDEs are software applications that provide a comprehensive development environment for creating, testing, and debugging software. Examples include Eclipse, Visual Studio, and IntelliJ.
2. Version Control Systems (VCS): VCS are software tools that help in managing changes to source code, documents, and other files. Examples include Git, Subversion, and Mercurial.
3. Project Management Tools: Project management tools help in planning, tracking, and managing projects. Examples include Jira, Trello, and Asana.
4. Programming Languages: The choice of programming language depends on the type of application being developed. Commonly used programming languages include Java, PHP, Python, C++, Ruby, and JavaScript.
5. Frameworks and Libraries: Frameworks and libraries provide pre-built components and functionality that can be used to accelerate development. Examples include React, Angular, Django, and Spring.
6. Cloud Computing Platforms: Cloud computing platforms provide on-demand computing resources such as servers, storage, and databases. Examples include AWS, Azure, and Google Cloud Platform.
7. Testing and Quality Assurance Tools: Testing and quality assurance tools help in ensuring the quality of the software. Examples include Selenium, JUnit, and SonarQube.

**STUDY OF EXISTING SYSTEM**

The existing system of Prasidhi Financial Solutions operates as an online financial firm where customers can browse through the website to see the services provided. After which if the customer is interested in being a client, they must contact the advisor through the details provided in the website and mention the services they require after identity verification. The website is not responsive and visually attractive.

Drawbacks of the Existing System:

* Time-consuming process: Customers need to be in call with the advisor for long hours to talk identity verification, address proofs. The advisor also finds it difficult to keep track as there is no online data collected from the clients
* Visually unattractive: The website is not visually pleasing and requires changes
* Not responsive: The website has no backend to store information about potential clients and the services they need
* Manual process: The existing system operates manually, and there is a high chance of errors in filling up forms and documentation. The process can be tedious and frustrating for customers as well as the advisor.

**ANALYSIS**

**FEASIBILITY**

|  |  |
| --- | --- |
| Feasibility Criteria  (Feasibility refers to the degree to which a proposed project or initiative is practical, achievable, and worthwhile.) | Weight (Percentage)  (Weighted percentage is a way of assigning different weights or values to different factors or criteria when evaluating a project or proposal.) |
| **Operational Feasibility:**  A feasibility study is conducted to assess the ability of the organization to support the proposed solution. This involves evaluating the current systems, processes, and resources in the organization, and determining whether they are sufficient to support the new solution. | 20% |
| **Technical Feasibility:**  This study evaluates whether the project is technically feasible, considering the technical aspects like equipment, technology, and infrastructure required for the project. It assesses whether the technical resources and expertise are available for the project. | 40% |
| **Economic Feasibility:**  This study evaluates the economic viability of the project, considering factors like the cost of the project, expected return on investment, and payback period. It determines whether the project is financially viable or not. | 50% |

**REQUIREMENT ANALYSIS**

* Customer prospect details is required with the information on customer name, phone number, Email ID, address proof, ID proof, KYC compliant and more.
* The source of information is required that is if the information about the company has been received through general search or any other ways.
* An invoice must be generated for the selected service.
* The client payment details are required.
* The advisor should be able to make changes in the website and database and also be able to view the registered clients.
* The SEBI disclosure page must be made dynamic.

**IMPLEMENTATION**

Implementation is a critical phase in a project's life cycle where the proposed solution or system is put into practice or operation. The implementation phase follows the planning and design phases and involves the actual development, testing, installation, and deployment of the solution or system.

The following are some of the key steps involved in the implementation phase of the project:

1. Development: This involves the actual coding or programming of the solution or system based on the design specifications developed in the planning phase.
2. Testing: Once the development is complete, the system undergoes rigorous testing to ensure that it meets the requirements and specifications outlined in the design phase. Testing can be done in various ways, such as unit testing, integration testing, system testing, and user acceptance testing.
3. Installation: Once the system has been thoroughly tested, it is ready for installation. The installation process involves setting up the necessary hardware and software components, configuring the system, and integrating it with other systems and applications as needed.
4. Deployment: Once the system is fully tested, it can be deployed for use by end-users or customers. This involves rolling out the solution or system across the organization or to the intended user base.
5. Monitoring and Evaluation: Once the system is deployed, it is important to monitor its performance and evaluate its effectiveness in meeting the desired objectives. This involves tracking key performance indicators (KPIs) and collecting feedback from users to identify areas for improvement.

Overall, the implementation phase is critical to the success of a project, and it requires careful planning, coordination, and management to ensure that the solution or system is delivered on time, within budget, and meets the desired objectives and specifications.

**FUTURE ENHANCEMENT AND CONCLUSION**

Prasidhi Financial Solutions is a website that provides financial planning services. Information about the founder/advisor, his previous works, and the services he provides is mentioned. The first step in the future enhancement is to identify areas for improvement. This may involve analysing feedback from users to determine what features or functionalities are in demand. We can then use this information to prioritize the enhancements and create a roadmap for the future development of the project.

We have created an updated website for Prasidhi.in. It is a simple, user friendly and visually attractive website that provides information about financial planning services. It offers holistic financial planning solutions to people at all wealth levels to achieve their financial goals. And the website has been developed on time.

The website was more useful if it was able to accept the clients’ details so that the advisor can schedule an appointment. We have created a database for the same so that the clients will be able to register themselves through the website. The advisor should also be able to view the registered clients and make changes in the website and access the database when desired.

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