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**INFORMATION TECHNOLOGY**

**Design and development of a business opportunity management application**

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**INFORMATION TECHNOLOGY**

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**TITLE**

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Dedication

No matter the words chosen, I will never be able to express to them my sincere love. To the Eternal, **Allah**, the Almighty for having helped me reach the end of my studies, for giving me the strength to survive, as well as the courage to overcome all difficulties.

To My Dear Parents, no dedication could express my respect, eternal love, and consideration for the sacrifices you have made for my education and well-being. I thank you for all the support and the love you have shown me since my childhood, and I hope that your blessings always accompany me. May this modest work be the fulfillment of your many expressed wishes, the result of your countless sacrifices, although I can never repay you enough. May **Allah**, the Most High, grant you health, happiness, and a long life and ensure that I never disappoint you.

To all my Friends, thank you immensely for your help, your time, your encouragement, your assistance, and support.

To all my teachers, I dedicate this work. To all those who have contributed directly or indirectly to the completion of this work, may **Allah** grant you health and prosperity.

Appreciation

It is with great pleasure that I reserve this page as a symbol of gratitude and deep appreciation for all those who have contributed to the completion of this work. This experience has taught me a lot, especially how to manage stress during challenging times and how to persevere regardless of the situation.

First and foremost, I would like to express my heartfelt thanks to the management of the company **'Progress Engineering’** for giving me this wonderful opportunity to undertake my final internship with them.

I would also like to thank ***Mr. Mabrouk Zhili*** and ***Mr. Lassaad Saidani***, my supervisors, for their valuable advice and availability. I have been well guided and have always been able to rely on my professor, who never ceased to encourage me and have confidence in me.

I cannot let this opportunity pass without expressing my deep gratitude to the entire educational and administrative team at **ESPRIT** for all the efforts they have made to provide us with quality education.

Lastly, I extend my most sincere thanks to the members of the jury for agreeing to evaluate this work. I hope that they find in it the qualities of clarity and synthesis they are expecting.

General introduction:

In recent times, the landscape for IT companies has undergone a notable shift, marked by increasing challenges in securing new projects and clients, as well as the struggle to retain their existing customer base. The rapid evolution of technology, coupled with a highly competitive market, has led to a proliferation of IT service providers, intensifying the battle for limited opportunities. Clients now demand not only exceptional technical expertise but also a keen understanding of their specific industry needs and challenges. This necessitates a constant investment in upskilling employees and staying at the forefront of emerging technologies, which can strain resources. Moreover, as project scopes expand and become more complex, maintaining effective communication, meeting deadlines, and delivering superior quality have become paramount, further testing the capacities of IT companies. Amidst this, retaining existing customers has become equally daunting, with loyalty hinging on consistently surpassing expectations and offering ongoing value. As a result, IT companies find themselves in an intricate dance of innovation, adaptability, and customer-centricity to navigate this arduous landscape.

In this End-Of-Studies project, I will try to explain how *Progress Engineering* is responding to these changes and how we have developed a software that addresses all of these challenges.

The report is structured as follows: At first, I defined the project scope from presenting the hosting company to the problem statement, our proposed solution and its goals as well as laying out the working methodology. Throughout the second chapter, I specified the functional and non-functional requirements alongside identifying the main actors and refining the product global use case. After that, in the 3rd chapter, I wrote about the technical environment (Runtime environment, Frameworks, libraries, tools etc...) that we used during the internship to develop the application. Following that, in the 4th chapter, I defined the software architecture, the Database design and gave some use case scenarios. Finally, the 5th chapter is dedicated to showcase the project from development to production and a realization of the final application.

Chapter 1:Project Scope

This chapter will be dedicated to provide information about the hosting company, we will also be stating the project context by defining the problem, a study of the existing, criticism of the existing, our proposed solution and finally we will be ending the chapter by talking about the work methodology.

1.1-Hosting Company:

**Progress Engineering** is an innovative High-tech company in the IT sector, it is offering a variety of development and consultancy solutions focusing on the e-services and secured intranet. It was founded in 2000 by a highly qualified team of engineers acting in the field of software development and telecommunications, this company has acquired expertise, skills, and experience that enable it to successfully carry out all IT projects, from specification to maintenance. Its main mission is to be the World leader in thought and technology in e-services and consulting. They an attentive partner, flexible in tuning the established engagement methods and helping each customer to make the most out of the partnership with low cost and error-free services.

They also provide an integrated and highly flexible mix of on site, off site, near shore and offshore services Worldwide.

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In this section we will be talking about the project context, the description of the problem and the end goal of our project.

1.2-Project Context:

The project is entitled “*Design and development of a business opportunity management application.*".

It concludes the courses of the third year of Software Engineering, specifically **TWIN** (**T**echnologies of **W**eb and **I**nformation), at **ESPRIT** School of Engineering as a graduation project.

I was led through it to make a professional experience in **Progress Engineering** for the position of "Full Stack Software Engineer”, from March to September 2023.

1.3-Problem Statement:

In today's rapidly evolving business landscape, customers stand as the cornerstone of revenue generation, holding a pivotal role in shaping a company's success. However, this vital revenue stream is encountering new challenges due to the escalating competition fueled by the integration of cutting-edge technologies. As businesses harness the power of technological advancements, they find themselves operating in an era of heightened customer expectations and unprecedented options.

The traditional paradigm of customer-business interactions has undergone a seismic shift. Empowered by digital transformation, customers are now equipped with an array of choices that span geographical boundaries and industry sectors. This proliferation of options has elevated the competition to a level where companies must vie not only with local competitors but also with global counterparts, intensifying the battle for customer loyalty and market share.

In parallel, the dynamics of customer expectations have evolved drastically. Customers, armed with the ability to compare products, services, and experiences instantly, are increasingly discerning in their demands. They expect businesses to be not just responsive, but hyper-responsive, providing seamless interactions, tailored solutions, and rapid issue resolution.

This demand for personalized and instantaneous service has put immense pressure on companies to reengineer their customer engagement strategies and elevate their customer service capabilities to new heights. As a result, businesses find themselves in a dual challenge: they must not only stay ahead of the technological curve to remain competitive but also recalibrate their approach to customer engagement to meet the heightened expectations of the modern consumer.

A misstep in either direction can lead to loss of market share, erosion of customer trust, and ultimately, diminished revenue. Under the pressure of situations like this, how do we ensure the continuity of business and the winning of new projects?

1.4-Existing products:

1.4.1-Salesforce:

Salesforce is one of the most well-known and widely used CRM platforms. It offers a comprehensive suite of tools for managing sales, customer service, marketing, and more. Salesforce allows businesses to centralize customer information, track interactions, manage leads and opportunities, automate tasks, and provide a holistic view of the customer journey.

1.4.2-HubSpot CRM:

HubSpot CRM is a robust CRM solution designed to help businesses streamline their sales, marketing, and customer service efforts. It offers tools for managing contacts, tracking deals, automating workflows, creating marketing campaigns, and providing customer support.

1.5-Critisism of the existing:

1.5.1-Salesforce:

**Complexity and Learning Curve:** Salesforce's extensive feature set and customization options can lead to a steep learning curve for new users. Implementation and configuration might require significant time and resources, especially for smaller businesses without dedicated IT teams.

**Cost:** Salesforce's pricing can be considered high, particularly for smaller businesses. While they offer various plans, the more advanced features often come at a premium, making it a substantial investment for some companies.

1.5.2-HubSpot CRM:

**Limited Advanced Functionality:** While HubSpot CRM is excellent for small to medium-sized businesses, larger enterprises might find that it lacks some of the more advanced features and scalability they require.

**Pricing Tiers:** some advanced features are locked behind higher-priced tiers, which might not be cost-effective for all businesses especially smaller ones.

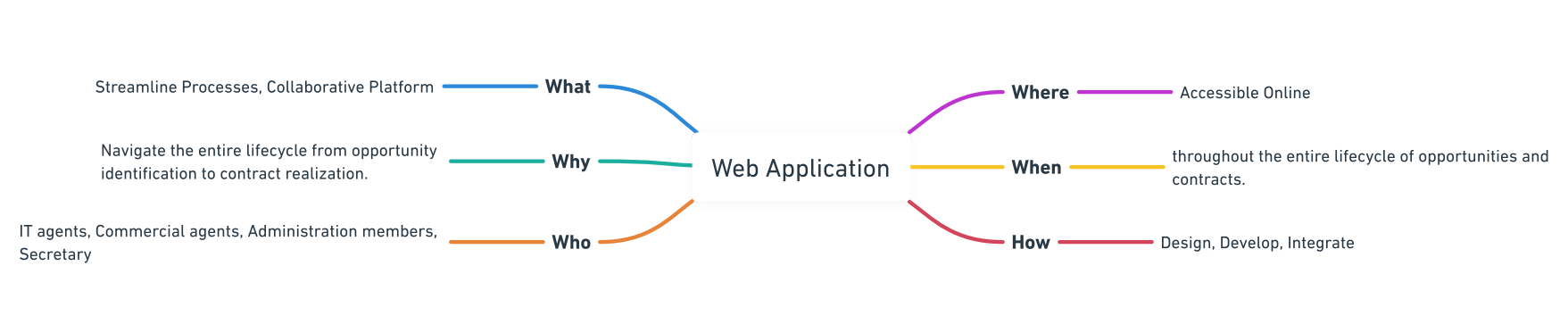
1.6-Proposed solutions:

A comprehensive web application to streamline the end-to-end process of managing business opportunities and contracts. The solution should empower the company to efficiently store and manage customer data, make informed decisions on participation in consultations or bids, and navigate the entire lifecycle from opportunity identification to contract realization.

The application should serve as a collaborative platform for IT agents, commercial agents, and administration members to seamlessly share crucial project information. It should enable the tracking of opportunity statuses, evaluation of agent performance through scores and statistics, and integration of an email notification system to ensure prompt updates on offers. The ultimate goal is to enhance operational efficiency, improve decision-making, and foster effective communication among different stakeholders within the company.

This solution is adequate for small, medium, and large businesses.

We could summarize our solution by referring to the 5W1H problem-solving method (see figure below):



1.7-Work Methodology:

1.7.1-Agile Scrum:

**What is agile?**

Agile is a process that allows a team to manage a project more efficiently by breaking it down into several stages, each of which allows for consistent collaboration with stakeholders to promote steady improvements at every stage. [R1]

**What is scrum?**

In short, scrum is a framework for effective collaborations among teams working on complex products. Scrum is a type of agile technology that consists of meetings, roles, and tools to help teams working on complex projects collaborate and better structure and manage their workload. Although it is most often used by software development teams, scrum can be beneficial to any team working toward a common goal. [R1]

**What is agile scrum?**

Agile scrum methodology is a project management system that relies on incremental development. Each iteration consists of two- to four-week sprints, where the goal of each sprint is to build the most important features first and come out with a potentially deliverable product. More features are built into the product in subsequent sprints and are adjusted based on stakeholder and customer feedback between sprints. [R1]

In our case, we had 12 sprints over 6 months, each sprint lasts for 2 weeks, and we combined each 4 sprints into a release so overall we have 3 main releases.

The methodology we adapted is as follows:

* Daily meeting:
  + - What I have been working on?
    - What will I work on today?
    - What is blocking me?
* Weekly meeting:
  + - The made Progress.
    - Re-order priorities
* Sprint review:
* Every 2 weeks we represent the work that we accomplished during the sprint.
* Release:
* Every 2 months (4 sprints) we deliver the complete work that we have done during the release.

1.7.2-Software Development Life Cycle:

The Software Development Life Cycle (**SDLC**) is the series of steps an organization follows to develop and deploy its software. There isn't a single, unified software development lifecycle. Rather, there are several frameworks and models that development teams follow to create, test, deploy, and maintain software.

**Planning:**

This is the first phase and it was dedicated to define the project scope, goals, and objectives in collaboration with stakeholders, gather and document detailed requirements, including features, functionalities, and user roles, create a project plan outlining tasks, responsibilities, and timelines.

**Code & Build:**

This is the second phase of the process which we as developers do our main job and that is design the global architecture and the database architecture, develop the necessary frontend and backend functionalities, implement business logic.

**Test:**

Testing is an essential part of any software development lifecycle. In addition to security testing, performance tests, unit tests, and non-functional testing such as interface testing all take place in this phase.

**Deployment:**

This phase is dedicated to the deployment of the application, this is where we introduced DevOps into our project by implementing a continuous integration/continuous delivery (CI/CD) with the use of Infrastructure as Code (IaC) tools to define and manage the application's infrastructure, making deployment consistent and repeatable.

**Conclusion:**

At this point, we've gained a comprehensive grasp of the project's overall scope and its alignment with *Progress Engineering*'s mission to face the above challenges. In the upcoming sections, our focus will be on establishing the fundamental principles that we will build upon our application.

Chapter 2: Requirements and Specifications

The requirements analysis and specification phase of a project's development cycle is crucial. As a result, we will be introducing our main actors in this chapter. The definition of our application's functional and non-functional needs follows. Finally, in order to provide a simplified graphical representation of the behavior of our system, we will build the global use case diagram.

2.1-Actors Identification:

An "actor" in the context of a web application usually refers to any entity that engages with or makes use of the application.

These entities could be people, machines, or other external elements that operate the application.

Understanding the various roles that actors play in a web application's operation helps in creating and putting the application's functionality and security measures into place.

For our application we can identify 4 total actors as follows:

* Admin: This entity has a full access to everything of the app, it mainly refers to administrative members who will have the final decision making of every operation.
* Secretary: Employee of the company and his/her main job is to add necessary documents as needed.
* Commercial Agent: Employee of the company that will be working on every opportunity assigned to him/her.
* IT Agent: Employee of the company that will be working on every project or task assigned to him/her.

2.2-Functional Requirements:

Since we have 4 actors and each has its own role, we have 4 dashboards, so we decided to divide the functional requirements into 5 parts: 4 of them depends on the view of each actor and the final one is system functional requirements.

* **Admin space management:** Being an admin, you have the full control of the application:
* -Full access to user management.
* -Full access to customer management.
* -Full access to contact management.
* -Full access to opportunities management.
* -Full access to project management.
* -Full access to task management.
* -Full access to bill management.
* -Full access to contract management.
* -Full access to offer management.
* -Assign a commercial agent to an opportunity.
* -Assign a team to a project.
* -Assign an IT agent to a specific task.
* -Ability to view commercial agent statistics.
* -Ability to view commercial agent scores.
* -Ability to view the opportunity lifecycle from A to Z.
* -Ability to view full reports (Money gained, Customers gained/lost, percentage of opportunities won, etc...)
* **Secretary space management:**
* -Full access to customer management.
* -Full access to contact management.
* -Ability to add/read opportunities.
* -Ability to change user profile.
* **Commercial agent space management:**

This actor is mainly created to handle opportunity assigned to him/her and make an adequate offer, therefore:

* -Update an opportunity status from "Assigned" to "Working On" then to "Negotiating".
* -Update an opportunity status from "Negotiating" to "Closed won" or "Closed lost".
* -Create an offer related to an opportunity assigned to him/her.
* -Submit an offer.
* -Update an offer from "On going" to "Accepted" or "Rejected".
* -Delete offers made by him/her that are not submitted.
* -Ability to change user profile.
* **IT Agent space management:**

After winning an opportunity, it becomes a project so this actor is handling the technical part of the project as follows:

* -Update status of tasks from "Assigned" to "Working on" to "Test" then finally to "done".
* -Create feedback (if missing information about his/her task) if necessary.
* **System functional requirements:**
* -Authentication and authorization.
* -An upload/download file system.
* -Emailing service.
* -Reminder service for each related actor.

2.3-Non-functional requirements:

* **Ergonomic:** The application has an intuitive and user-friendly interface that is easy to navigate and use. Security: We implemented authentication and authorization mechanisms to ensure that only authorized users have access to specific features and data.
* **Reliability:** Using some error handling techniques and through consistent testing and monitoring we ensured that our application is reliable.
* **Scalability:** The application is designed to accommodate both vertical scaling (adding more resources to a single server) and horizontal scaling (distributing load across multiple servers) so it will always be scalable. Availability: We ensured that the application is highly available by adding load balancers and using cloud services to deploy the application.

**Conclusion:**

By analyzing our project objectives and business specifications, we took the first step in clarifying the large modules that our application will tackle in this chapter. The technical environment in which we will develop this application is described in the following chapter.

Chapter 3:Technical environment

After defining the requirements and specifications of our project, we will dedicate this chapter to talk about the different technologies that we have used to build our solution, we will be dividing them into parts, FrontEnd, BackEnd, Database, DevOps.

3.1-Technologies:

3.1.1-FrontEnd technologies:

**React JS:**

This is an open-source JavaScript library used for building user interfaces for web applications.

It was developed by Facebook and later open-sourced, gaining widespread adoption in the web development community. React allows developers to create reusable UI components and manage the dynamic rendering of those components based on changes in application state.

* **Advantages**:
* **Component-Based Architecture:** React's component-based architecture allows developers to break down complex user interfaces into smaller, reusable components. This modularity makes it easier to manage and maintain code, promotes reusability, and facilitates collaboration among developers working on different parts of an application.
* **Virtual DOM and Performance Optimization:** React's use of a virtual DOM (Document Object Model) provides a significant performance boost.
* **Strong Ecosystem and Community Support:** React has a large and active community of developers, which means there are numerous resources, tutorials, libraries, and tools available to help developers learn and build with React.

**Material UI:**

It is a popular open-source UI framework for building user interfaces in React applications. It provides a set of reusable components and styles based on Google's Material Design principles. Material Design is a design language developed by Google that emphasizes a clean and modern aesthetic, along with a focus on usability and consistency across platforms.

3.1.2-Backend Technologies:

**Springboot:**

Java Spring Boot (Spring Boot) is a tool that makes developing web application and microservices with Spring Framework faster and easier through **three** core capabilities:

* Autoconfiguration
* An opinionated approach to configuration
* The ability to create standalone applications

These features work together to provide you with a tool that allows you to set up a Spring-based application with minimal configuration and setup. [ref]

**Spring security:**

It is a framework that provides authentication, authorization, and protection against common attacks. With first class support for securing both imperative and reactive applications, it is the de-facto standard for securing Spring-based applications.[ref2]

3.1.3-Database:

**MySql:**

**MySQL** is an open-source relational database management system (RDBMS) that is widely used for storing and managing structured data. It is one of the most popular and commonly used database systems in the world.

3.1.4-Versioning:

**Git:**

**Git** is an open-source distributed version control system (VCS) that is widely used for tracking changes in source code during software development. It was initially developed by Linus Torvalds in 2005 and has since become one of the most popular and essential tools in the field of software development.

**GitHub:**

**GitHub** is a web-based platform and service that provides tools for version control and collaborative software development using the Git version control system. It offers a wide range of features to help developers and teams manage, collaborate on, and track changes to their codebase.

3.1.5-Cloud Services:

**AWS CodeBuild:**

It is a fully managed build service that helps you compile source code, run unit tests, and produce artifacts that are ready to deploy. AWS CodeBuild scales continuously and processes multiple builds concurrently, so your builds are not left in the queue.

**AWS CodePipeline:**

It helps you quickly model and configure the different stages of a software release and automate the steps required to release software changes continuously. You can integrate AWS CodePipeline with third-party services like GitHub or use an AWS services such as AWS CodeCommit or Amazon ECR.

**Amazon Elastic Container Registry (Amazon ECR):**

It is a fully managed registry that makes it easy for developers to store, manage, and deploy Docker container images. Amazon ECR is integrated with Amazon ECS to simplify your development-to-production workflow. Amazon ECR hosts your images in a highly available and scalable architecture so you can deploy containers for your applications reliably. Integration with AWS Identity and Access Management (IAM) provides resource-level control of each repository.

**Amazon Elastic Container Service (Amazon ECS)**:

It is a highly scalable, high-performance container orchestration service that supports Docker containers and allows you to easily run and scale containerized applications on AWS. Amazon ECS eliminates the need for you to install and operate your own container orchestration software, manage and scale a cluster of virtual machines, or schedule containers on those virtual machines.

**AWS Fargate:**

It's a compute engine for Amazon ECS that allows you to run containers without having to manage servers or clusters. With AWS Fargate, you no longer have to provision, configure, and scale clusters of virtual machines to run containers. This removes the need to choose server types, decide when to scale your clusters, or optimize cluster packing.

**Amazon Relational Database Service (Amazon RDS):**

It is a web service that makes it easier to set up, operate, and scale a relational database in the cloud. It provides cost-efficient, resizable capacity for an industry-standard relational database and manages common database administration tasks. Amazon Aurora is a fully managed relational database engine that's built for the cloud and compatible with MySQL and PostgreSQL. Amazon Aurora is part of Amazon RDS. [ref3 for all]

3.6-Other:

**Docker:**

**Docker** is an open-source platform that enables programmers to automatically deploy, scale, and manage applications inside of isolated, lightweight containers. Containers, a type of virtualization, offer a consistent and portable environment for running software across many settings, including development, testing, and production. They package an application and its dependencies together.

**CDK:**

This stands for "Cloud Development Kit." It is an open-source software development framework that allows developers to define cloud infrastructure in familiar programming languages, such as TypeScript, Python, Java, and others. The CDK simplifies the process of provisioning and managing cloud resources by providing a higher-level abstraction over cloud providers' native infrastructure-as-code tools.

\*Reference:

https://www.ibm.com/topics/java-spring-boot

https://docs.spring.io/spring-security/reference/index.html

https://docs.aws.amazon.com/

**Conclusion:**

In this chapter we talked about and we defined the different technologies we have used to achieve our goals, In the next one we will dive deep into the design, architecture and the implementation.

Chapter 4: Design and Architecture

After talking about the functional requirements, non-functional requirements, the actors, techincal environment that we have used , we will be dedicating this chapter to dive deeper into the design and architecture of the whole application. We will start by talking about the software architecture in general then the database modeling , after that we will talk about and explain some concepts we have used to achieve our end goal solution and finally we will be finishing by walking through some different scenarios.

4.1-Software architecture:

The software architecture of a system is the set of structures needed to reason about the system, which comprise software elements, relations among them, and properties of both.

4.1.1-Logical architecture:

The logical architecture is defined as the organization of the subsystems, software classes, and layers that make the complete logical system. In our case, we decided to go with the multi-tier (n-tier) architecture specifically three-tier architecture and we will be explaining why and we will talk about its benefits.

The three-tier architecture is the most popular implementation of a multi-tier architecture and consists of a single presentation tier, logic tier, and data tier. The following illustration shows our generic three-tier application.

Une image contenant capture d’écran, diagramme, conception

Description générée automatiquement

The chief benefit of three-tier architecture is that because each tier runs on its own infrastructure, each tier can be developed simultaneously by a separate development team, and can be updated or scaled as needed without impacting the other tiers.

Adding to the faster development and improved scalability, the three-tier architecture provides an improved reliability, an outage in one tier is less likely to impact the availability or performance of the other tiers.

Last but not least, the three-tier architecture provides a huge improvement on the security of the whole application, because the presentation tier and data tier can't communicate directly, a well-designed application tier can function as a sort of internal firewall, preventing SQL injections and other malicious exploits.

**Presentation Tier:**

The presentation tier is the user interface and communication layer of the application, where the end user interacts with the application. Its main purpose is to display information to and collect information from the user. This top-level tier can run on a web browser, as desktop application, or a graphical user interface (GUI), for our application, the web presentation tiers are developed using ReactJs and Material UI.

**Logic Tier:**

The logic tier, also known as the application tier or middle tier, is the heart of the application. In this tier, information collected in the presentation tier is processed - sometimes against other information in the data tier - using business logic, a specific set of business rules. The application tier can also add, delete or modify data in the data tier. In our case we used Java and Springboot to develop this tier and build our application logic.

**Data Tier:**

The data tier, sometimes called database tier, data access tier or back-end, is where the information processed by the application is stored and managed. We have used MySql as a database to store and manage all the datas that we need.

In a three-tier application, all communication goes through the logic tier. The presentation tier and the data tier cannot communicate directly with one another. So through what do these tier communicate ?

The presentation tier communicates with the logic tier by sending requests in the form of HTTP(S), The application tier processes these requests, executes the necessary business logic, and generates a response. The response is then sent back to the presentation tier, which renders it for the user. We also need to add that data between these tiers are in the format of JSON following the REST API architectural style.

The logic tier communicates with the data tier to retrieve or update data required for the application’s functionality. This communication is typically done using database queries or data access libraries. The logic tier sends queries to the data tier to fetch specific data or to perform data updates.

* REST API : REST is an architectural style for designing networked applications and APIs. RESTful APIs use HTTP methods (such as GET, POST, PUT, DELETE) to perform operations on resources (e.g., data objects) identified by URLs (Uniform Resource Locators). They are widely used for building web services and are known for their simplicity and scalability.
* HTTPS : Modern users expect a secure and private online experience when using a website. HTTPS is a secure version of the HTTP protocol, which is used for transferring data over the internet.
* JSON : JSON is a lightweight data interchange format that is easy for both humans to read and write and machines to parse and generate.It is a common format for data exchange in RESTful APIs, as it is easy to work with in various programming languages.

4.1.2-Global Cloud architecture:

Une image contenant texte, nombre, logiciel, conception
fqsd qsd 

Description générée automatiquement

Une image contenant capture d’écran, texte, diagramme

Description générée automatiquement

\*Reference:

R1:https://www.businessnewsdaily.com/4987-what-is-agile-scrum-methodology.html