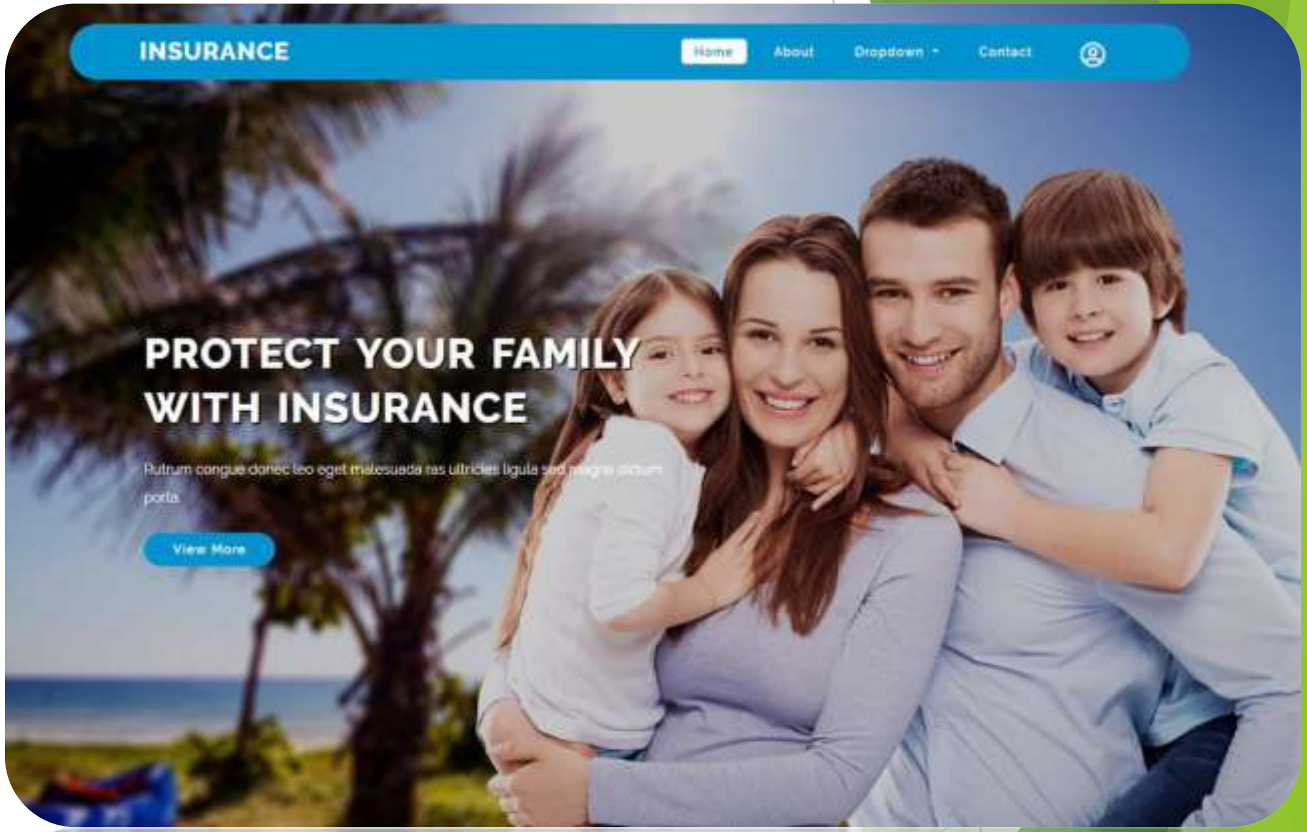
"Navigating Assurance: Unveiling Insurance Website"



Presented By:

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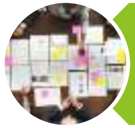
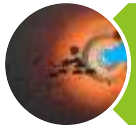
Topics To Discuss:


The Process


Objective


Scope of Project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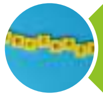

Conclusion

The Process:-

PROCESS

- Identifying Entities
- Creating ER Diagram
- Deciding Modules
- Mapping Entity Framework Tables
- Building REST API
- Making Front-End Modules

Objective:-

1. **Enhance Operational Efficiency:** Streamline and optimize insurance processes, reducing manual efforts, and improving the overall efficiency of the organization.
2. **Improve Customer Experience:** Enhance the customer experience by providing user-friendly interfaces, self-service options, and quick response times to customer queries and requests.
3. **Enhance Data Security:** Implement robust data security measures to protect sensitive customer information, ensuring compliance with data privacy regulations.
4. **Automate Processes:** Implement automation to reduce human intervention in repetitive and time-consuming tasks, reducing errors and improving speed.
5. **Agent Productivity:** Improve the productivity of insurance agents by providing them with tools and resources to better serve customers and increase sales.
6. **Claims Processing Efficiency**

Technologies Learnt:

- C#:
- .NET CORE:
- JavaScript:
- Sql Server:
- Entity Framework:
- Postman:
- Web API:
- Angular:
- HTML,CSS:
- Git:
- Design Patterns
- Solid Principle

SCOPE OF THE PROJECT

Platform Development
Our project centers on the development of a user-friendly web-based insurance management platform. This platform will efficiently serve administrators, employees, customers, and agents, streamlining their insurance-related tasks and interactions.

User Authentication
We've successfully implemented robust user authentication methods customized for role-based access, guaranteeing both data privacy and the security of our system. This approach provides a strong defense against unauthorized access and safeguards sensitive information.

Data Management
The project encompasses comprehensive data management capabilities, enabling efficient handling of customer, agent, and policy records, ensuring data accuracy and consistency.

Configurable Settings
We have incorporated customizable configurations to adapt to diverse insurance categories, plans, schemes, and commission structures, offering adaptability and customization options.

Critical Features Integration
Furthermore, within our project's boundaries, we are integrating essential functionalities like policy registration, commission calculation, withdrawal processing, and dynamic report generation. These additions aim to streamline operations and elevate the user experience.

Technologies Used:

REST API

ANGULAR

CSS 3

.NET Core

Microsoft SQL Server

HTML 5

Entity Framework

JavaScript JS

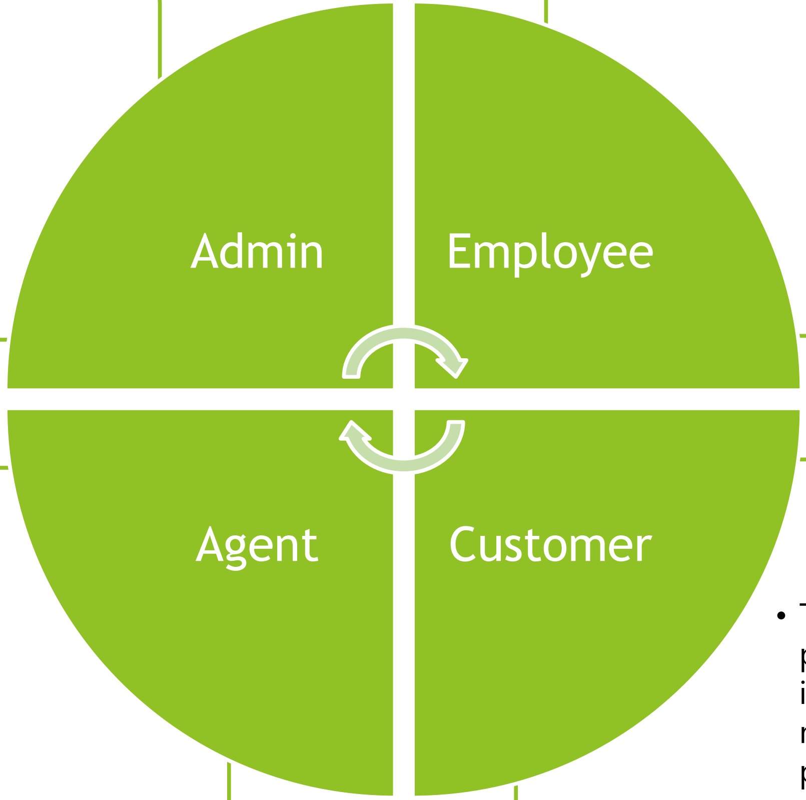
git

Bootstrap 5

Modules:

- The admin module provides comprehensive control and oversight of the insurance platform, enabling administrators to manage policies, users, and system configurations with ease.

- The employee module serves as the backbone for internal operations, enabling insurance company staff to handle policy underwriting, claims processing, and policyholder inquiries efficiently and securely



- The agent module empowers insurance agents to view and manage customer policy accounts, request payments, and track commissions, enhancing their ability to serve and engage with clients effectively

- The customer module offers policyholders a user-friendly interface to explore, purchase, and manage insurance policies, access policy documents, make payments, and submit claims.

Admin Module:

1. Module Purpose:

- This module is designed for administrators and employees working within an insurance company. The primary user is the administrator, who plays a central role in managing the website.

2. User Roles:

- There are two main user roles: administrators and employees. Administrators hold higher privileges and responsibilities compared to employees.

3. Access to Records:

- Both administrators and employees can access customer and agent records. This access allows them to view and manage critical data related to customers and agents.

4. Administrative Functions:

- Administrators are responsible for a wide range of administrative functions, including:
  - **Settings Management:** Administrators can configure and manage various settings within the system.
  - **Insurance Plan Details:** They can add, modify, or remove details of different insurance plans, ensuring that the system remains up to date with the latest offerings.
  - **Agent Commission Details:** Administrators can set and adjust commission rates for agents, fostering transparency and incentive for the agent network.
  - **Withdrawal Request Handling:** Administrators have the authority to accept or reject withdrawal requests sent by customers and agents. This function involves ensuring compliance with company policies and regulatory requirements.

Employee Module:

1. Employee Registration:

- Employees are added to the system by the administrator. The administrator is responsible for creating and managing employee accounts.

2. Document Verification:

- Employees have the responsibility to verify the documents submitted by customers. This involves checking the authenticity and accuracy of the documents as part of the onboarding process.

3. Agent Registration:

- Employees can register new agents with the company. This function allows for the expansion of the agent network and is crucial for business growth. It can also edit agent details.

5. Limitations on Employee Actions:

- Employees have certain limitations in their actions within the system:
  - **No Employee Addition**
  - **No Policy Changes**

Agent Module:

1. **Information and Sales:** Agents are employees of the insurance company responsible for providing information about insurance policies and schemes to potential customers. They play a crucial role in attracting and acquiring new customers for the insurance company.
2. **Commission-Based Earnings:** Agents earn a commission for each and every insurance policy registration they bring to the company. This commission is typically a percentage of the policy's premium and serves as an incentive for agents to generate business.

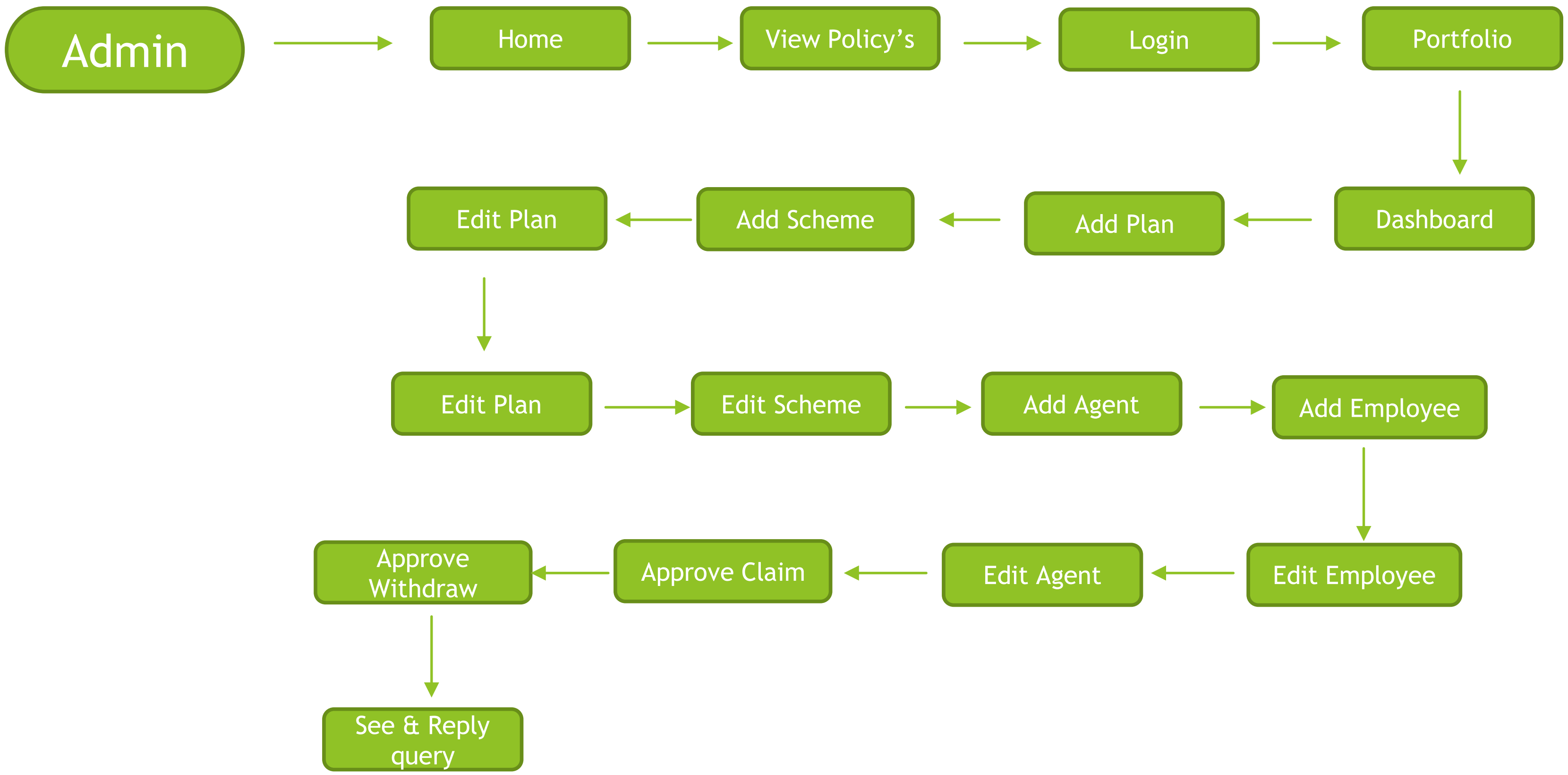
- **Administrative Process of Adding Agents:**

1. **Profile Verification:** The administrative process of adding agents involves thorough verification of their profiles. This verification ensures that the agent is qualified, trustworthy, and complies with the company's standards and requirements.
2. **Manual Verification:** The verification process is conducted manually by the administrator. This involves scrutinizing the agent's credentials, background, and any necessary certifications to confirm their suitability to represent the company.

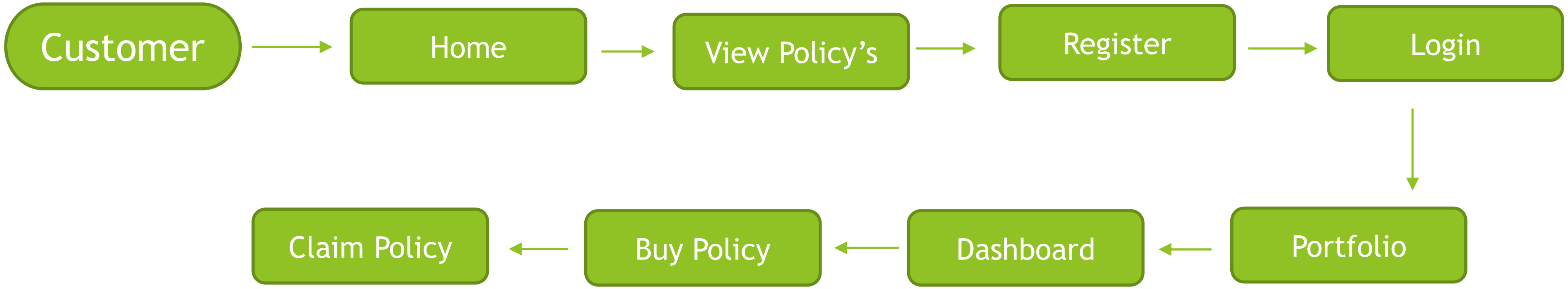
Customer Module:

1. **Account Registration:** Customers can register their policy accounts, providing necessary personal and contact information.
2. **Policy Application:** To apply for a policy, customers must enter their profile details. The system provides information about policies and their plan details.
3. **Policy Registration:** After reviewing policy details, customers can complete the policy registration process, and the system generates a policy receipt.
4. **Profile Update:** Customers have the ability to update their profile details, ensuring that their information is accurate and up-to-date.
5. **Password Change:** Customers can change their account password for added security.
6. **Policy Account Creation:** Customers can create a new policy account, providing essential information to apply for a policy.
7. **Customer Inquiries:** Customers can send queries and inquiries using the contact form.
8. **Employee Access:** Employees have access to the customer query panel, where they can view and respond to customer queries, ensuring timely customer support and assistance.

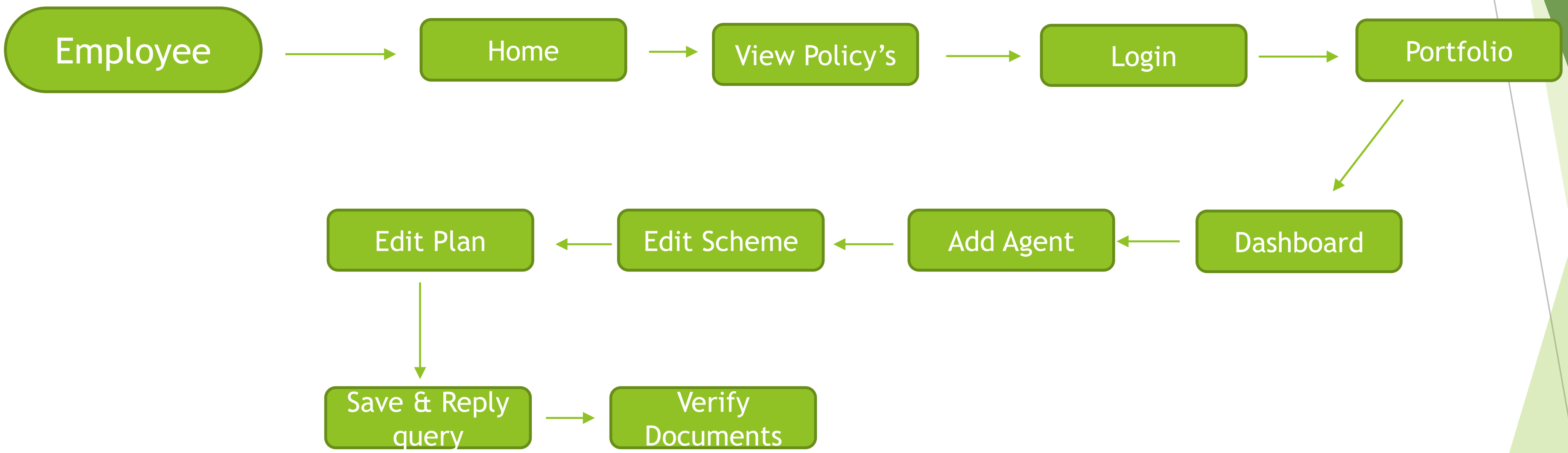
Admin Experience Flow:



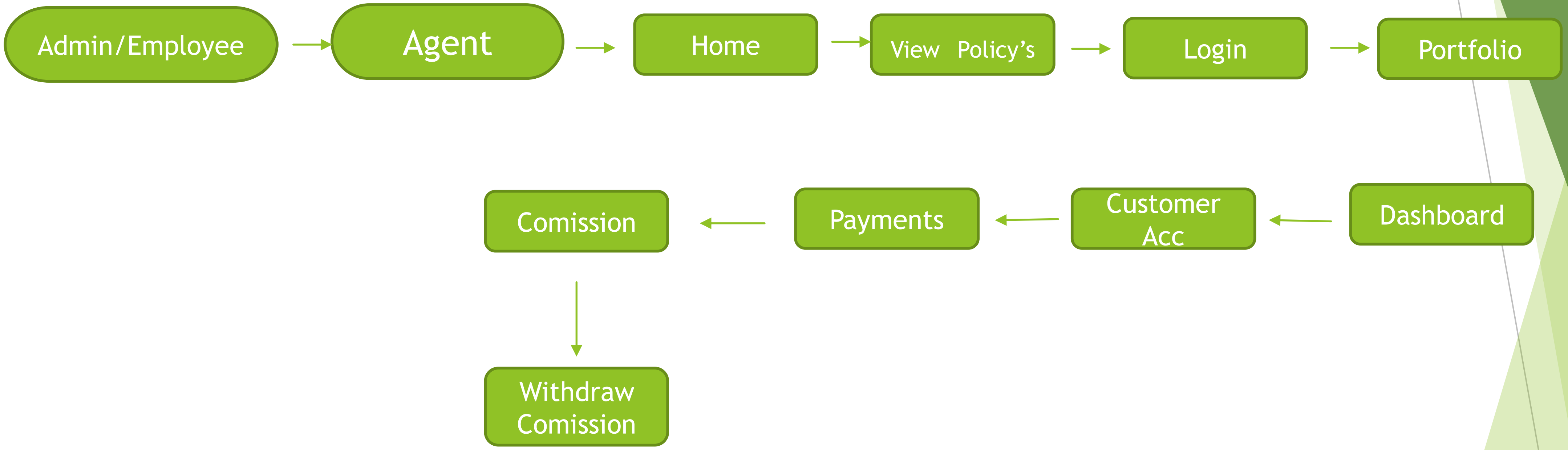
Customer Experience Flow:



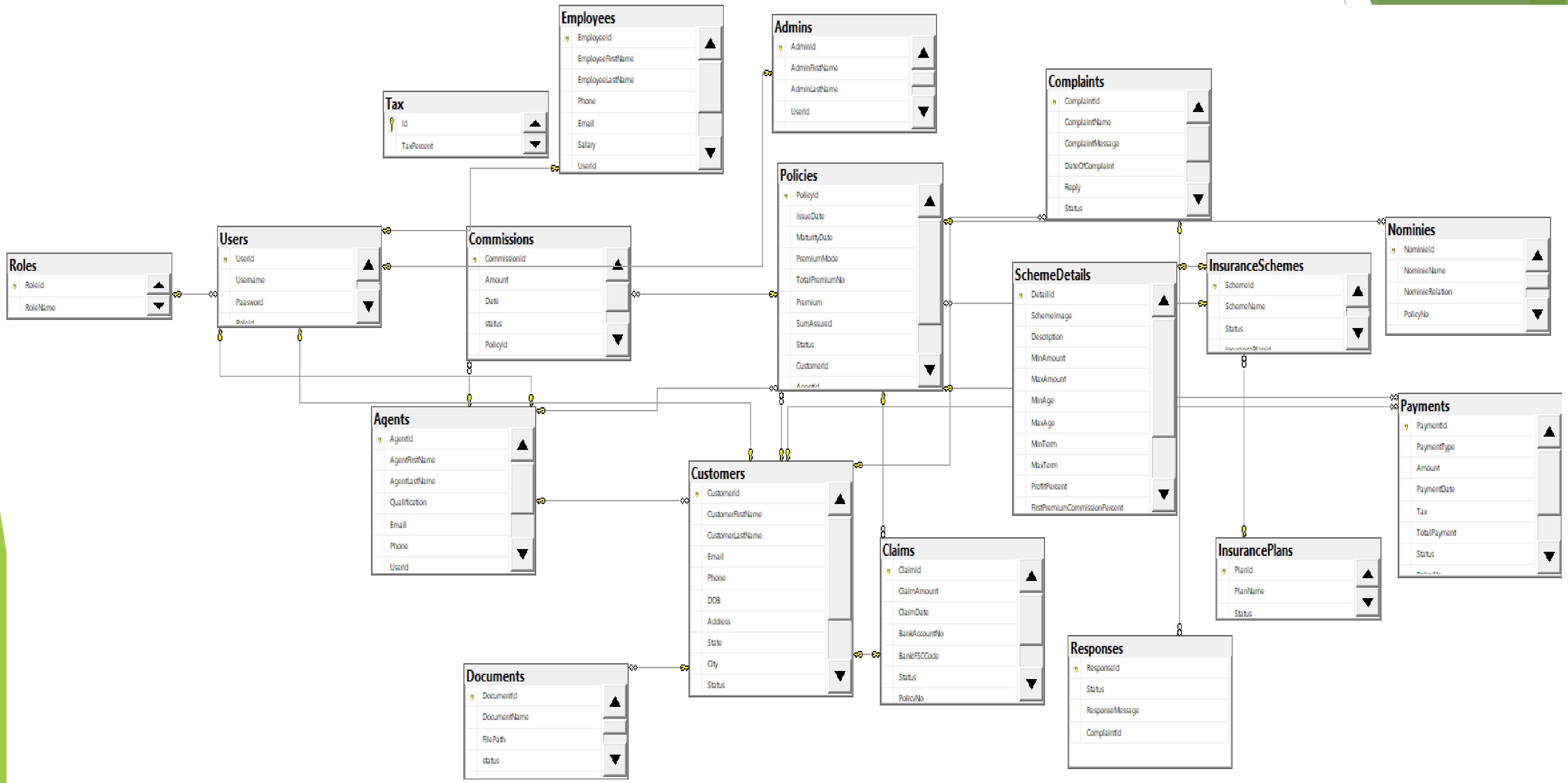
Employee Experience Flow:



Agent Experience Flow:

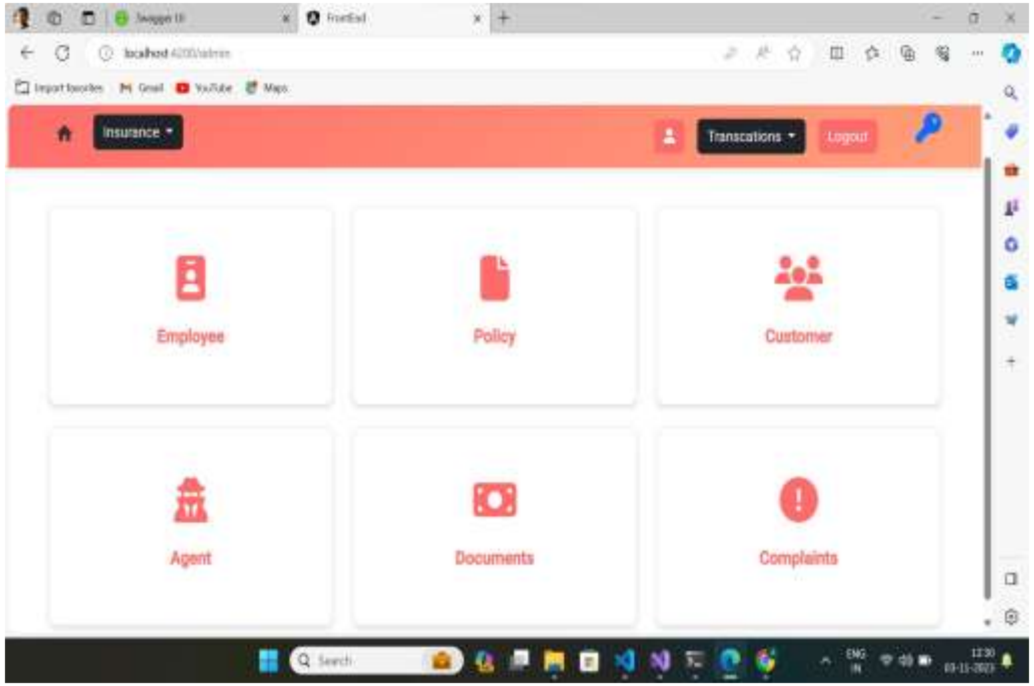


Database ER Diagram:

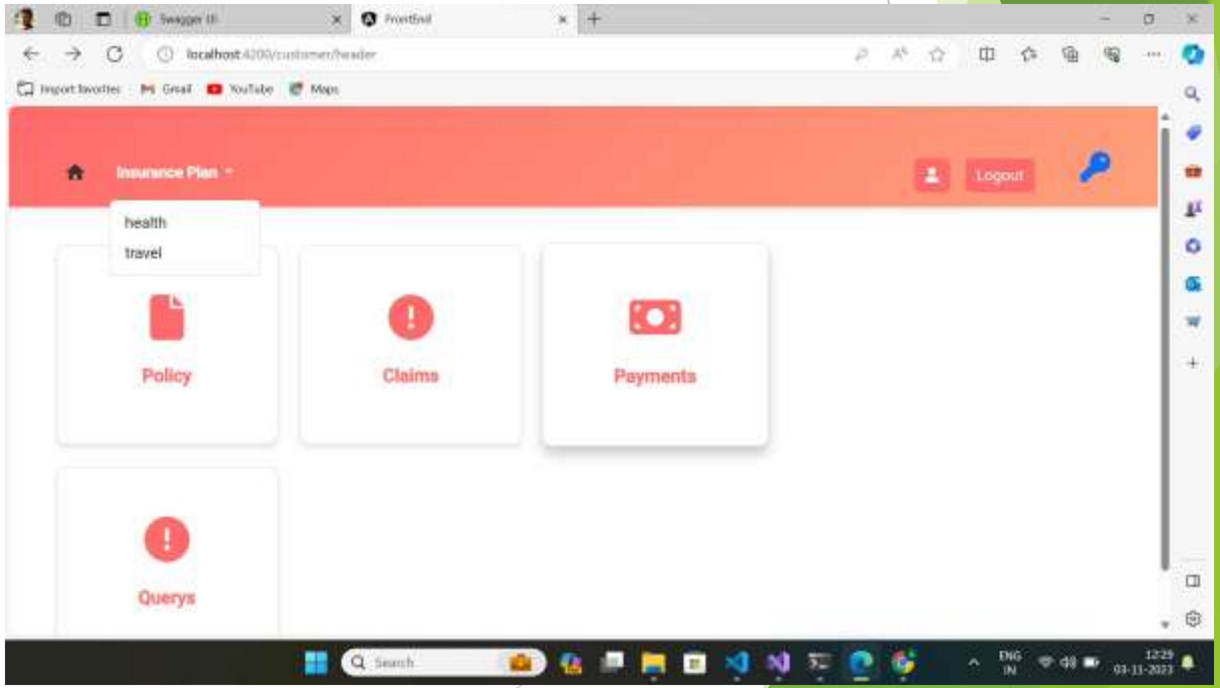


Demonstration:-

Admin Panel:

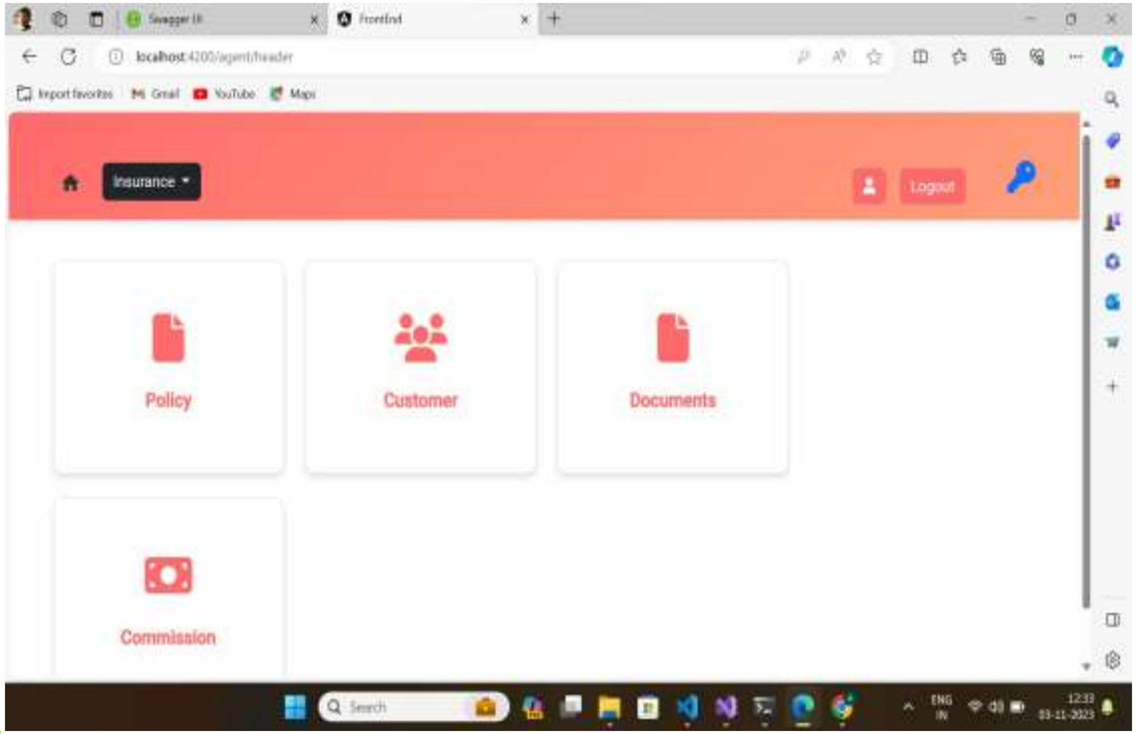


Customer Panel:

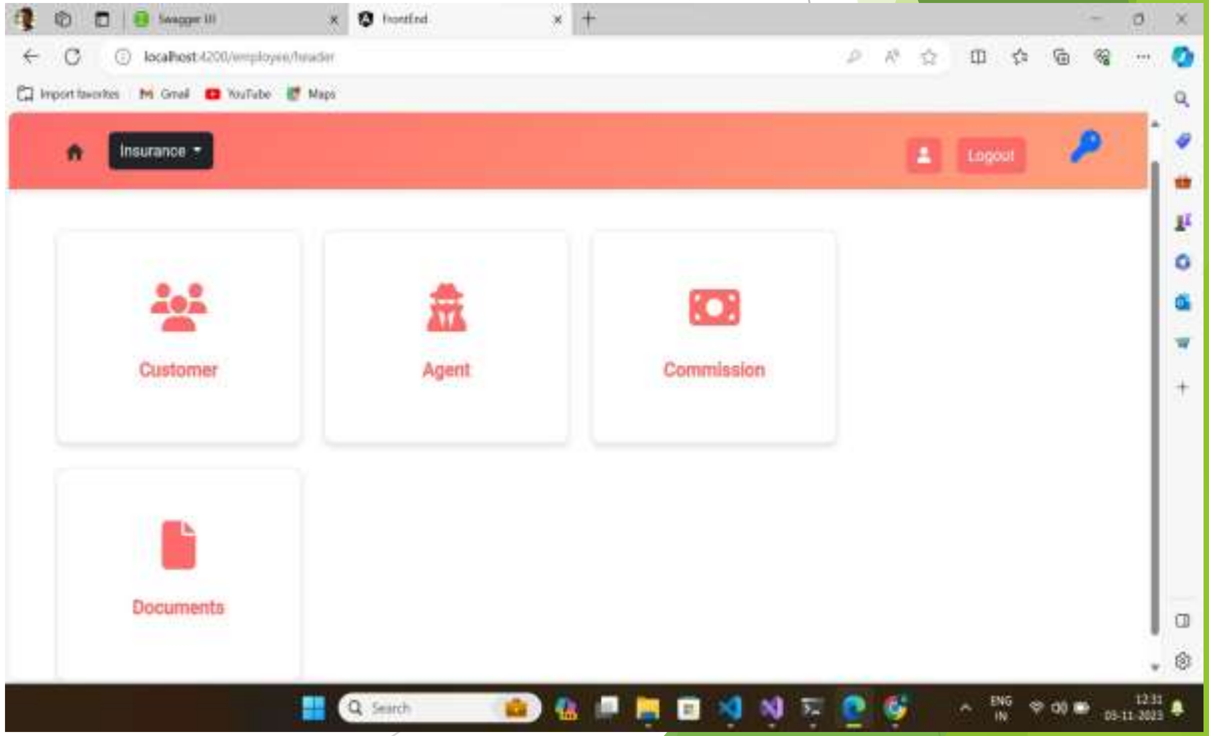


Demonstration:

Agent Panel :-



Employee Panel:-



Challenges and learning:

- **Data Security and Compliance:** We prioritized data security and ensured compliance with relevant regulations, safeguarding user information.
- **Entity Relationship Management:** We gained expertise in managing entity relationships within the database, optimizing data integrity and storage efficiency..
- **API Integration Proficiency:** We developed strong proficiency in integrating external APIs, enabling seamless data exchange with external systems.
- **Database Performance Optimization:** We mastered techniques to optimize database performance, ensuring efficient system operations and swift user response times.
- **Rest API Creation and Connection:** We became skilled in creating and establishing connections between RESTful APIs, facilitating seamless data sharing and system functionality.
- **Effective Teamwork:** A core learning experience, we improved our teamwork, communication, and collaborative problem-solving skills, vital for future projects and personal growth.

Conclusion :

- We acquired full-stack expertise through the implementation of Angular and .NET Core technologies.
- We've achieved our objectives by creating a user-friendly, secure, and innovative platform that simplifies insurance management for all users.
- The benefits are numerous, from streamlined policy management to improved customer experiences.
- The project encouraged collaboration among team members, leading to the improvement of our teamwork and communication skills.
- During our journey, we gained valuable insights from the insurance industry and applied them in our project.


thank you