**STAIRS** **TO YOUR**

**VIRTUAL DESIRE**

**Virtual Market Solution Ltd.**

2nd Floor, House-54/A, Road-132, Gulshan Circle -1, Dhaka-1212

**Cell No:** +88 01770555017

**LP:**  +88 02 9888836

**E-Mail:** info@vmsl.com.bd

**URL:** www.vmsl.com.bd



Goals

Develop the Insurance Web Application for With Agent Affiliation for Client. The copyright of this document rests with Virtual Market Solution Ltd and no part of the same should be copied without consulting with the same.

This is the proposal document for Virtual Market Solution Ltd service offering in the website design and development and custom web application development space. The document details our understanding of the brief, the objectives of the services suite, the methodology, deliverables and commercials.

Client Brief

Client desires to develop an Insurance Web Application where:

1. Customers will be able to login/register into the website.
2. Customers will be able to create an account after submitting their email id, name, address, etc. on the website. + Google OAuth
3. Customers will also be able to easily search for services by using different keywords like name, category wise etc. and will be able to refine their results by using filters such as service and service type etc. on the website. + Definition of services
4. Customers will be able to view the insurance package with details, images, z etc. on the website. + Need to collect details of packages
5. Customers will have the ability to customize their insurance service by submitting the information on the website. + Must define, to what extent the information will be customizable
6. Customers can view the events posted by the admin on the website.
7. Customers can submit their reviews on the services listed on the website.
8. Customers will be able to place orders on the website. + What is an order in terms of insurance here. Is it buying insurance?
9. Customers will be able to check their order status on the website.
10. Customers will be able to use the facility of order cart on the website. + If not an e-commerce, cart concept is not viable. Mark as favorite can be an option
11. Customers will be able to make payments for their orders by using integrated payment gateway given by the Client.
12. Customers will be able to choose their mode of shipping insurance card using integrated shipping gateway on the website. + What gateways are preferred or under consideration?
13. Customers will be able to claim insurance from the website.
14. Customers will be able to provide delivery address for each order made on the website.
15. Customers will be able to receive an email for confirmation after an order placed on the website.
16. Customers will be able to receive newsletter after submitting their name and email id on the website and this section will be managed by admin. + Bulk email service required
17. Customers will be able to share the link of the website on the social networking website like Facebook, twitter etc. Customers will be able to view FAQ on the website.
18. Admin will be able to manage the customers, services, orders, and affiliate account etc. on the website from the backend. + Detailed workflow should be drawn in the SRS
19. Affiliate account can be opened and will have an independent admin panel for each affiliate account.
20. Affiliate admin panel will have affiliate commission details with withdrawal procedure. + Detailed workflow should be drawn in the SRS
21. Provide the basic pages (i.e., about us, Contact Us, FAQ, help) for company information.

Scope of Work

Page Templates

* Design Templates
* User Visibility research and Layout Engineering.
* Logos

Template Layout

Banner

* Size according to specifications.
* Logo Placement.
* Text.
* Graphics.

User Visibility Content

* Information bar
* Menu Bar
* Tool bar
* Side Bar
* Header and Footer.
* Text and Graphics

Design Specifications

Design tools and technologies the design and layout of the application will be SEO friendly constructed using PHP Laravel Framework. The application upon completion will be integrated with Google analytics for keeping an eye on the statistics of the site. It will carry tell a friend and printer friendly version at all pages. To help people bookmark the site easily; add this widget will be embedded at the top of the homepage.

Header Pages

* Home
* Search
* About Us
* Insurance Service Page
* Insurance Claim Page
* Career
* Contact Us
* Affiliate Page
* Language + What language packages needed

Footer Pages

* Sitemap
* Terms and Conditions
* Privacy Policy
* FAQ
* Social Media Integration

#### Website Content Page

* Home.
* My Account Control Panel.
* Search.
* Advanced Search.
* Service/ Service.
* Reviews.
* Events.
* Blog.
* Contact Us.
* FAQ.

#### Customer Registration

This is the section where customer will be able to register to the site as member. Once customer shows interest and wants to get an account then he will be taken to a page where he will be asked to submit a form that would have various fields for the customer to enter their personal details creating a profile of their own. They will be able to submit captcha at the time of registration. This customer will automatically be assigned the account manager role for this particular account. Customer will receive a with activation link to confirm their email address is valid.

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#### Existing Customer

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After the account is activated the customer will be able to perform the following basic tasks in account settings:

* Customers would be able to Login.
* Customers would be able to view their account after successful Login.
* Customers would be able to add/edit/delete all their details.
* Customers would be able to request for their user name in case they forget their user name Login (Details will be mailed to the Customer).
* Customers would be able to request for their password in case they forget their password (Login Details will be mailed to the Customer).
* Customers would be able to change the password (Login Details will be mailed to the Customer).
* Customer will get email notification when new offer comes in.

#### Function of Customers

* Customers will be able to login/register into the website using social media login like Google and Facebook.
* Customers will be able to create an account after submitting their email id, name, address, etc. on the website.
* Customers will also be able to easily search for services by advance filtering, using different keywords like name, category wise etc. and will be able to refine their results by using filters such as insurance type etc. on the website.

Customers will have the ability to customize their services by submitting the information on the website.

* Customers can view the events posted by the admin on the website.
* Customers can submit their reviews on the services listed on the website.
* Customers will be able to place orders on the website.
* Customers will be able to check their order status on the website.
* Customers will be able to use the facility of order details on the website.
* Customers will be able to make payments for their orders by using integrated payment gateway given by the Client.
* Customers will be able to view the shipping details on the website.
* Customers will be able to receive an email for confirmation after an order placed on the website.
* Customers will be able to receive newsletter after submitting their name and email id on the website and this section will be managed by admin.
* Customers will be able to share the link of the website on the social networking website like Facebook, Twitter and Instagram etc.
* Customers will be able to view FAQ on the website

#### User Account Control Panel for Customers

Customers will be able to operate a host of functions from their Account control panel. The control panel will carry the following modules:

Customer Details

* Customers can fill in details about them.
* Customer can fill the Insurance information.
* Customers can change any information anytime.
* Customer can check their previous orders in My Orders.
* Customers can check status of their instant orders.
* Customers can print the insurance details.
* Customers can review active insurance.
* Payments.
* Customers can view all their old payment transactions.
* Customers can make payment for new orders.
* Customers can claim insurance.

Search

Customers will also be able to easily search for insurance by using different keywords like name, category etc. and will be able to refine their results by using filters such as price etc. on the website. They will be able to view list of content that match to their searched criteria.

Advanced Search

In this section customers will be able to customize the search based on their choice. Customers will be able to select preference and will be able to view the list that matches with their searched criteria

Insurance/ Services

Insurance service will also be sorted according to the categories and sub categories. Once a category is selected all the insurance will come out listed along with the image and other necessary details. If a customer clicks on the service he will be taken to a page where the complete details about the service is listed. Admin will be able to manage this section from the backend.

Service/Insurance Catalogue

The site will have the following categories and sub categories listed which will be modifiable form the back end.

* Insurance Name
* Short Description.
* Requirement
* Terms and Condition
* Purchase service.
* What about premium amount and other financial details? Are these covered in the short description?

Affiliate Account

Affiliated accounts are created by users themselves? They also have a separate admin panel other than the company admins. Need detail workflow for Affiliated Accounts.

User can open affiliate account. They will have affiliate admin portal. Any commission from affiliate selling will be visible there. This account will generate unique affiliate url for each user. Affiliate commission will be shown in here.

Language

This website will be store base. Each country or language can have different identity such as subdomain or domain with their respective country language. + This requires cloud and expert data center professionals, as well as SEO experts. Not solely within the scope of development.

Customize

In this section customers will be able to make their customization on the listed services by submitting their information on the website.

+ Mentioned earlier. What is the level of customization and what are the customizations?

Events

In this section customers will be able to view the various events details posted by the admin on the website. Admin can manage this section from backend.

Review

In this section customers can submit their reviews on the website. Admin can manage this section from backend.

Check out

Check out will allow the customers to carry the following features:

* Login or register
* Choose payment option.
* Order summary
* Enter billing and payment details
* Ad Coupon
* Complete order
* + A separate billing system will be developed

Shipping

Customers will be able to view shipping prices for their insurance order on the website. Shipping will be according to zip code address of the customers. After payment paid by the customers, admin will be able to ship the insurance document to the customers.

Payment gateway

Customers will be able to make payments for the order on the website by using integrated payment gateway given by the Client. Admin will be able to manage this section from the backend.

+ What options do the admin need to manage in payment gateway. Once its integrated it can’t be managed from front end. Only transaction reflections are there.

Social Media Integration

The website will be integrated with various social networking websites like Facebook, Twitter, Instagram, YouTube etc. Customers can only share the link of the website on these social networking sites.

Newsletter

Customers will be able to subscribe for the newsletter on the website by submitting e-mail id and name on the website. This section will be managed by admin from the backend.

Contact us

The contact us page will list contact details of the Client along with a contact us from and FAQ search option. Features include:

* Contact us form
* Contact Us Form Fields
* First Name
* Last name
* Email
* Contact (Drop down menu options)
* Message

Contact options: General Enquiry and another enquiry. Others will follow

Contact form will be shown to the customers in all the pages of the website.

**FAQ**

This section will list out the FAQ’s listed on the site. The FAQ’s will be maintained by the administrator. In this section all the questions will appear category vise for the ease of customers.

**Email Notifications**

* Customers will receive a notification after registration.
* Customers will receive notification after newsletter subscription.
* Customers will receive a notification after confirmation of order.
* Customers will receive a notification after payment

**Administrative Panel**

The back end of the website will be power packed with an administrative panel to manage the updating of data at the front as well as back end. Following are the key functionalities

* Customers Management
* Insurance Management
* General Management
* Order Management
* Content Management
* Reports Management + Reports can’t be managed, rather they are predefined, and can only be generated from front end

**Customers Management**

* Admin will be able to Manage the customers of the site
* Admin will be able to Add / Delete customers of the site
* Admin will be able to approve / reject the registration of the customers + Verifying email address won’t make the customer active. It will wait for approval.
* Admin will be able to View the list of all customers of the site
* Admin will be able to Search the list of all customers of the site
* Admin will be able to Activate or deactivate the customers of the site.
* Admin will be able to check daily order from dashboard.

**Services Management**

* Admin will be able to manage the Categories and Sub Categories of service on the website.
* Admin will be able to add / Edit / Delete the Categories and the Sub Categories of service with codes of the website.
* Admin will be able to View the list of all Categories and the Sub Categories of service of the website.
* Admin will be able to Activate / Deactivate the Categories and the Sub Categories of service of the website.
* Admin will be able to add / Edit / Delete service on the website.

**General Management**

* Manage Affiliate Agent.
* Manage reviews.
* Manage Events.
* Manage Inventory + What does inventory contain here?

**Order Management**

* Admin can manage the orders received by the Site.
* Admin can Add / Delete the orders received by the Site.
* Admin can View the List of all orders received by the Site.
* Admin can Search the orders received by the Site.
* The customer will get notified via email once the order is confirmed with all the relevant details of the services purchased in that order.

**Content Management**

Admin will be able to add/delete text/images/videos of the items on the site. The admin will be provided a rich interface editor which will enable him to create as many pages as required. Admin will be able to add text, images, links etc to the pages and those pages can be linked to any other pages on the same site.

Reports Management

Admin will be able to generate reports in a printable format for the following:

* List of Customers
* Payment Reports
* Sales Reports (daily/weekly/monthly/custom time frame).
* Affiliate Commission report. + Detailed calculation required
* Total claim report.

There will be a few predefined templates for additional pages. Admins can only add content to certain templates.

The admin will be able to apply filters date wise, name wise etc.

The admin will be able to export the reports in other formats like excel, csv etc. + PDF will be given.

Standardizations

**Design Standards**

Contrary to the general perception designing web applications is much more than just putting in good looking graphics and flash components. It requires much expertise to able it to run smoothly. We ensure that by:

* Website will be fully dynamic. Will adjust to any screen size.
* Designing the web application to make sure that the web pages will appear without horizontal scroll bar in all resolutions.
* The web site can be viewed on all the four popular browsers i.e.
* Internet Explorer + No. Microsoft Edge. Moreover not all HTML5 functionalities are available for this browser.
* Firefox Mozilla
* Safari
* Chrome
* Uniform Navigations in all the web pages of the application.

**Testing Standards**

We make sure each of our services undergoes rigorous testing so that it becomes 100% free of bugs. All the standard methods of white and black box testing are in place to achieve this feat. We:

* Prepare the test cases based on design and functionality.
* Ensure a cosmetic bug test before delivery.
* Test the embedded links exhaustively to make sure no errors are there.
* Validate all web applications
* Implementing Cascading Style Sheets (CSS) for each of the application.

**Delivery Standards**

Virtual Market Solution Ltd would promise to deliver the final project in the following ways

* Directly hosting on to servers mentioned by Client and deploys the application and database.
* A document briefing all details of the files and Database structure will be released after the final payment.
* Deliver the complete source code, with the database scripts in form of “PATCH” (which is the standard way followed by Virtual Market Solution Ltd, for delivering source code).
* All copyrights to the website will be held by Client.

**Delivery Schedule**

|  |  |
| --- | --- |
| **Weeks** | **Key Deliverables (Modules)** |
| 1 | Knowledge transfer, working on the layout, working on the functional requirements, Locking in the database design, Workings on Specific requirements |
| 2 | Development of module for customer’s registration, my account panel, search, advanced search with corresponding admin panel. |
| 3 | Development of module for services information, service catalogue, Customize, Events, order details, and check out with corresponding admin panel. |
| 4 | Development of module for payment gateway integration, shipping gateway integration, reviews and with corresponding admin panel. |
| 5 | Development of module for social media integration, newsletter, static pages and contact us page with corresponding admin panel. |
| 6 | Exhaustive testing, Ensuring Browser compatibility, Final delivery. |

**+ This entire table needs to be revisited.**

|  |  |
| --- | --- |
| **Component** | **Name** |
| Backend | PHP Laravel |
| Frontend | HTML, CSS, Jquery or VueJS |
| Database | ~~MySQL (Inventory),~~ MariaDB |

Systems to be developed in broad category:

1. Web site for product showcase and receiving order. Website will be used by customers to access their insurance details.
2. Affiliate seller’s control panel. Separate from website.
3. Admin control panel including separate section for content management.
4. API for all functionalities.