ConvergeSol
Solutions Focused On Your Business

Case Study

Interactive Dashboard

www.convergesolution.com

CONVERGESOL INC

ABOUT CONVERGESOL

12+
No. of Years in Business

70+
No. of Team Members

100%
Project Success Ratio

7+
Years of Avg. Relationship Tenure

salesforce CONSULTING PARTNER

Microsoft Partner

Relativity

Industries We Serve

- Financial Services
- Insurance
- Real-estate
- e-Commerce
- Manufacturing
- Healthcare
- Non-profits
- e-Learning

BUSINESS PROBLEM

- The client possesses a comprehensive dataset of statistics for various locations and desires to consolidate all reports and data in a single unified platform.
- The objective is to enable the client to conveniently access and analyze data from multiple locations. Additionally, the client seeks the ability to manage dynamic location endpoints, allowing users to modify them as needed rather than being constrained by static configurations.
- The client desired a **smooth integration** of new locations into the **reporting system** for users.
- The application should incorporate various features, including role-based permission management, **two-factor authentication**, and an **API installer** that automatically publishes on IIS.

OUR SOLUTION

- ConvergeSol played a pivotal role in constructing a resilient platform that offers an intuitive dashboard, effectively presenting customer statistics in a user-friendly manner.

- Users can easily configure and manage different aspects of the system by utilizing the web application. This includes defining and customizing customer profiles, user accounts, locations, and API endpoints. The configuration process is streamlined and accessible through the **intuitive user interface** of the web application.

- The project utilizes Agile methodology with JIRA for project management. We completed critical functionalities promptly and implemented technology upgrades to .NET Core 6, SQL Server, and Angular.

- The Dashboard web application incorporates the following key features:
  - **Dynamic Dashboards** and reports
  - Favorite Dashboards
  - **Export Reports** as Excel or PDF
  - Customer/User Management
  - **Role-based permission Management**
  - Locations/API management
  - **Two-factor authentication** & API Installer with auto publish on IIS

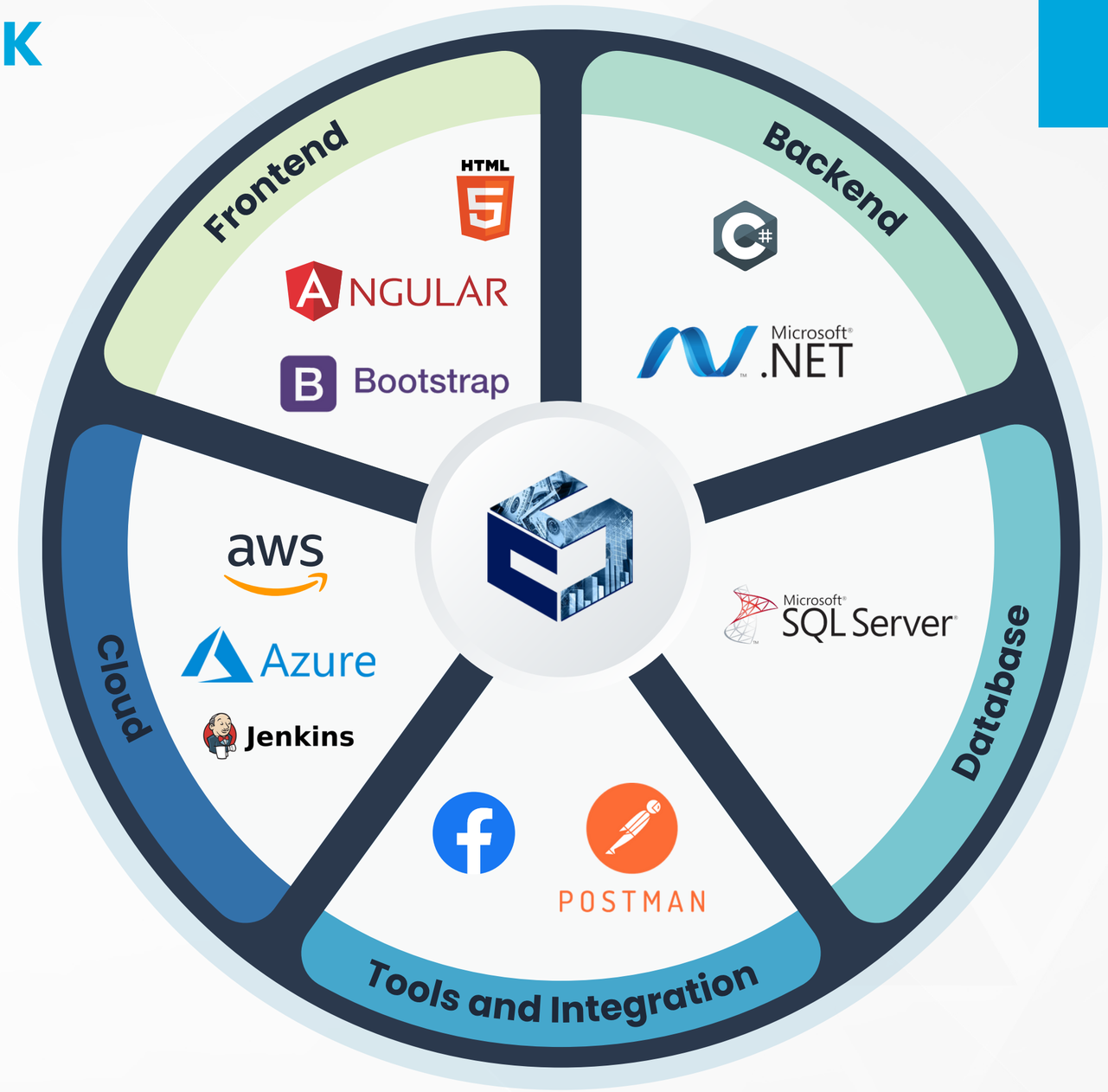
- ConvergeSol showcases expertise by delivering comprehensive solutions that empower clients with efficient data management, visualization, and scalable platform architecture for future enhancements.

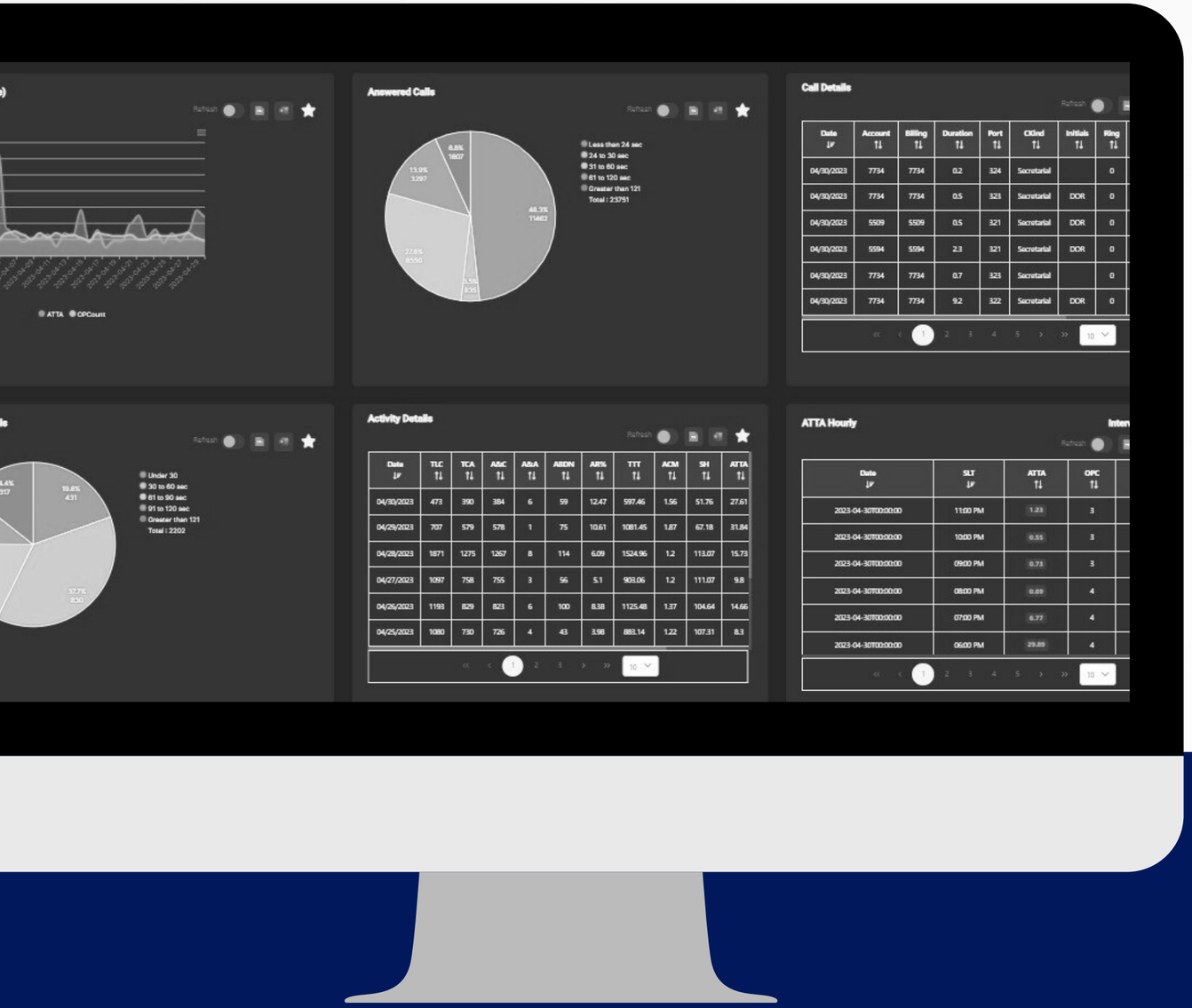
BUSINESS BENEFITS

- The dashboard serves as a powerful tool for businesses to monitor customer statistics, configure system settings, and leverage valuable insights for strategic decision-making and enhancing customer experiences.
- Our solution facilitated streamlined operations management, seamless data handling across locations, effective user management, and enhanced accessibility to dashboards and reports, resulting in **increased productivity**.
- Users can drill down into specific data points, apply filters, and explore trends, patterns, and correlations. This deepens understanding, identifies opportunities, and supports **data-driven decision-making**.
- Users can customize and personalize their views, choose relevant metrics, and generate ad-hoc reports. This expedites data access, **empowering users to gain insights** and make independent decisions.
- Our expertise in facilitating platform scalability and disciplined release management led the client to acknowledge us as a trusted and capable partner.
- Our successful partnership fulfilled immediate needs and laid a solid foundation for the client platform's long-term growth and development.

PROJECT TECHNOLOGY STACK

- Selecting the right technology stack for a project is a critical decision that can significantly impact the project's success.
- We have taken several factors into account while making our technology stack selection for project implementation:
  - Scalability
  - Performance
  - Security
  - Cost
  - Third-party Integrations
  - Time-to-Market





SAMPLE PROJECT SCREENSHOTS

Take a Look

ATTA Daily (line)
ATTA
OPCount
Answered Calls
Less than 24 sec
24 to 30 sec
31 to 60 sec
61 to 120 sec
Greater than 121
Total : 23751
Call Details
Abandoned Calls
Under 30
30 to 60 sec
61 to 90 sec
91 to 120 sec
Greater than 121
Total : 2202
Activity Details
ATTA Hourly
Interval

Secure Text Messages
Date
05/25/2023
Msg ID
Created
Expires
Retrieved
Retrieved Date
Account
Deleted
464020 May 25 2023 00:23:36 June 01 2023 00:23:36 0 6750
464028 May 25 2023 00:36:11 June 01 2023 00:36:11 1 May 25 2023 00:36:40 204457
464030 May 25 2023 00:42:13 June 01 2023 00:42:13 0 6750
464037 May 25 2023 01:20:13 June 01 2023 01:20:13 1 May 25 2023 01:21:13 5723
464038 May 25 2023 01:20:55 June 01 2023 01:20:55 0 6750
464066 May 25 2023 03:04:38 June 01 2023 03:04:38 1 May 25 2023 03:05:28 204457
464068 May 25 2023 03:22:55 June 08 2023 03:22:55 1 May 25 2023 03:47:12 204608
464072 May 25 2023 03:34:51 June 01 2023 03:34:51 0 6750
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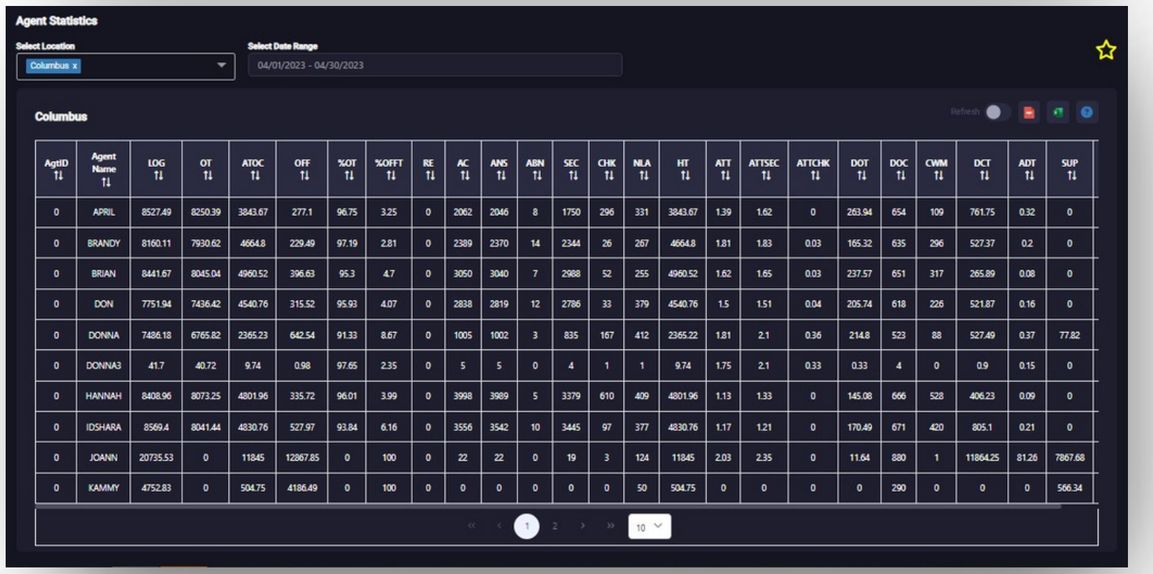
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Columbus x
Select Date Range
04/01/2023 - 04/30/2023
Columbus
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0 BRANDY 8160.11 7930.62 4664.8 229.49 97.19 2.81 0 2389 2370 14 2344 26 267 4664.8 1.81 1.83 0.03 165.32 635 296 527.37 0.2 0
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0 DONNA 7486.18 6765.82 2365.23 642.54 91.33 8.67 0 1005 1002 3 835 167 412 2365.22 1.81 2.1 0.36 214.8 523 88 527.49 0.37 77.82
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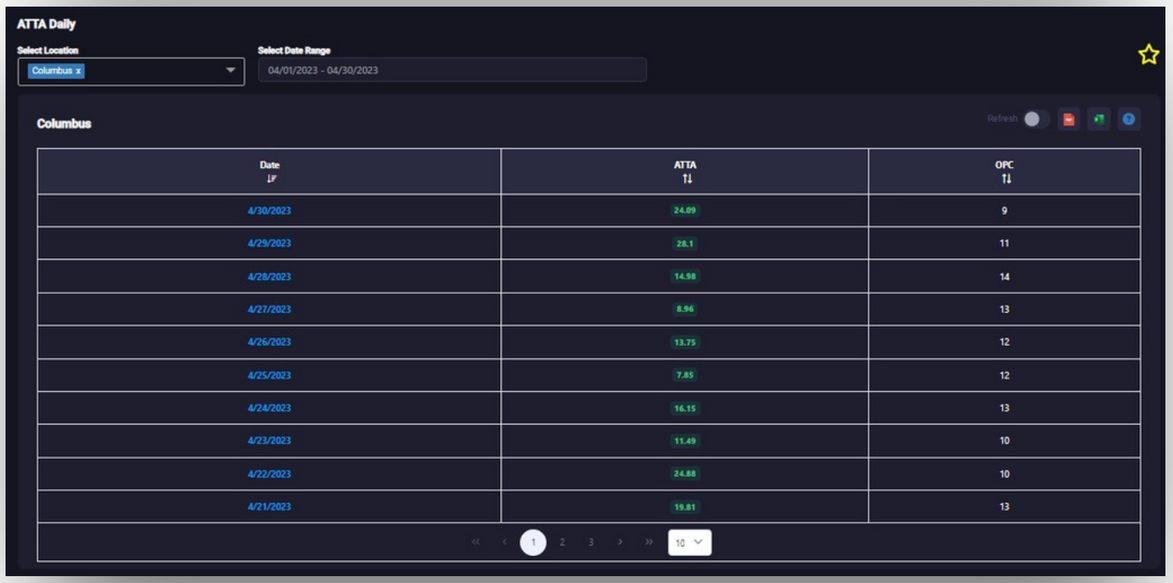
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Columbus x
Select Date Range
04/01/2023 - 04/30/2023
Columbus
Date ATTA OPC
4/30/2023 24.09 9
4/29/2023 28.1 11
4/28/2023 14.98 14
4/27/2023 8.96 13
4/26/2023 13.75 12
4/25/2023 7.85 12
4/24/2023 16.15 13
4/23/2023 11.49 10
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4/21/2023 19.81 13

OUR DEVELOPMENT PROCESS

The Software Development Life Cycle (SDLC) is a well-established framework utilized in project management.

It encompasses the various stages involved in the development of an information system, starting from the initial feasibility study and extending to the maintenance of the completed application.

DISCOVERY

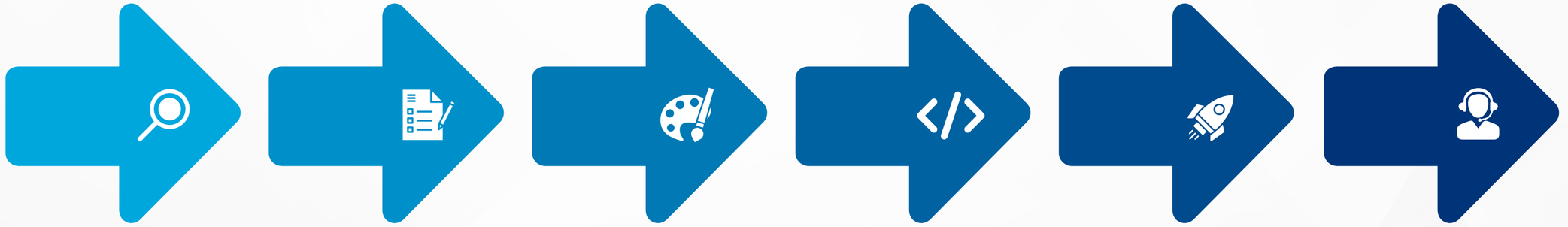
- In Depth Analysis
- Understanding Your Business
- Feasibility of Project

DESIGN

- Wireframe
- Web/Mobile
- Application Visuals
- Application Workflow

UAT & LAUNCH

- User Acceptance
- Testing
- Launch



PROJECT SPECIFICATION

- Requirement Understanding
- Finalize Scope
- Estimation
- Development Technologies

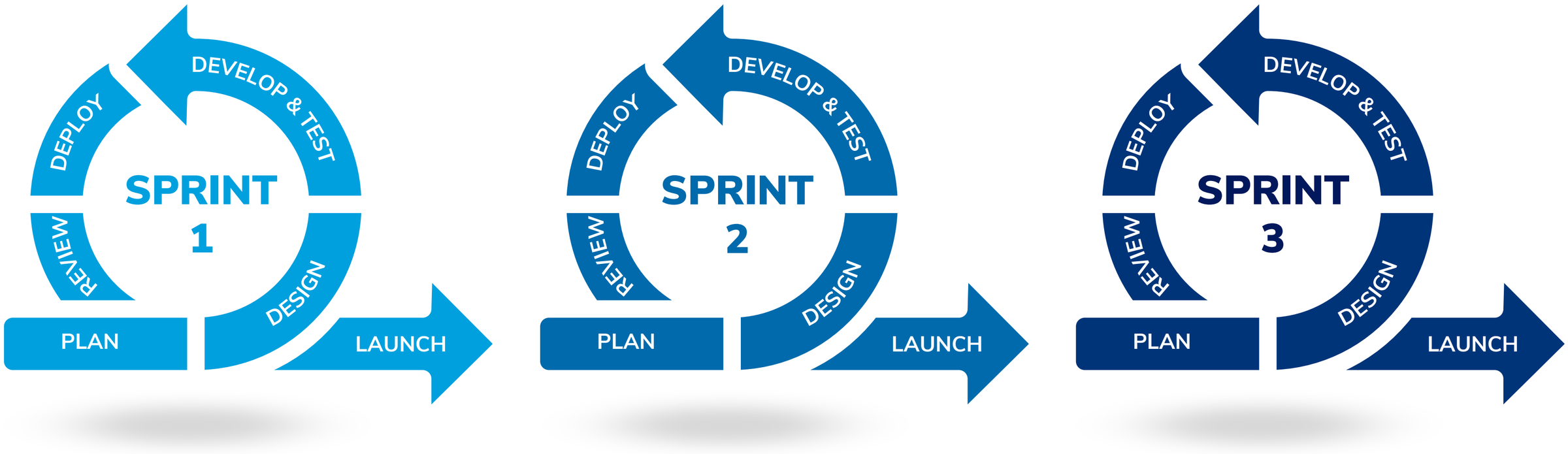
DEVELOPMENT & TESTING

- Project Planning
- Code Implementation
- Integration with 3rd Party
- Manual Testing
- Bug Fixing

ONGOING SUPPORT

- New Features
- Version Updates
- Server Management
- Backup

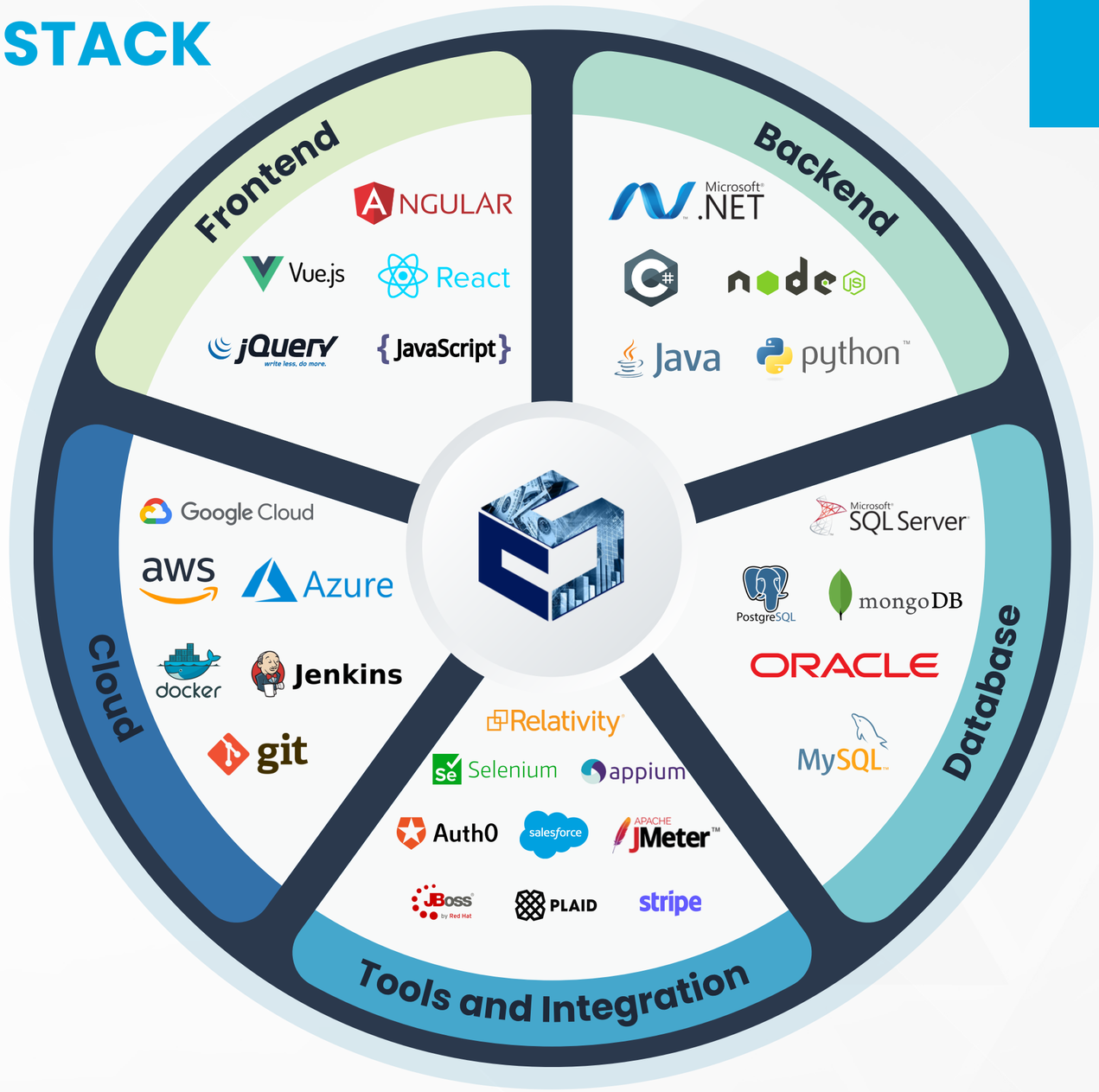
OUR AGILE DEVELOPMENT PROCESS

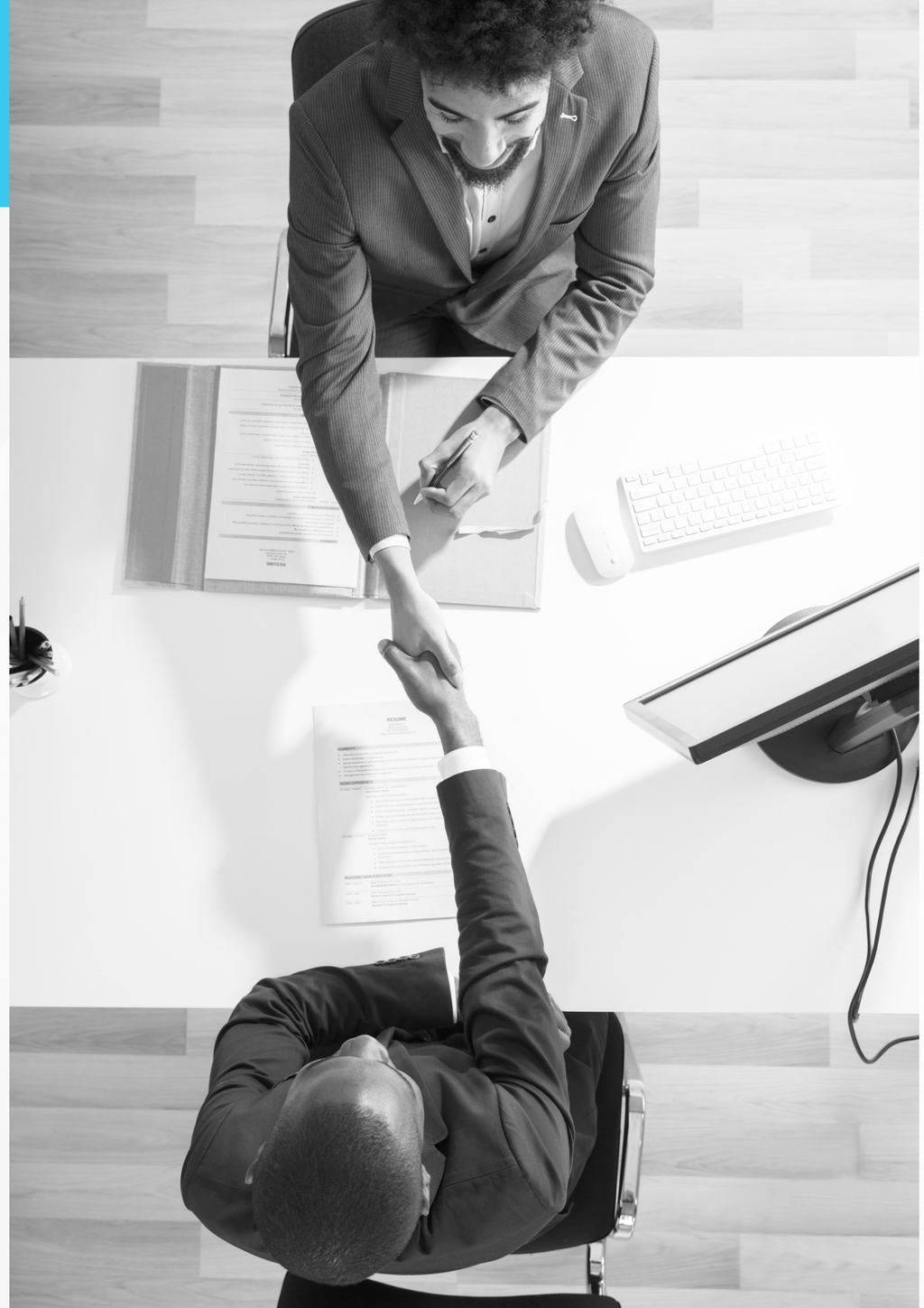


Agile methodology is a project management framework that prioritizes adaptability, collaboration, and iterative development. It emphasizes delivering value to customers through frequent releases, continuous feedback, and self-organizing teams. Agile promotes flexibility, transparency, and the ability to respond quickly to changes in requirements or market conditions.

CONVERGESOL TECHNOLOGY STACK

- At ConvergeSol, we leverage a cutting-edge technology stack to deliver innovative solutions that meet the unique needs of our clients.
- Our partnerships with leading software providers like Microsoft, Salesforce, Amazon, and Relativity allow us to create best-in-class solutions that solve real business problems.
- Here's a glimpse into our key technology experience across the entire software development lifecycle:
  - Frontend technologies
  - Backend technologies
  - Infrastructure and DevOps
  - Tools & Integrations





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EMBARK ON YOUR JOURNEY WITH US

Contact Us :

info@convergesolution.com
www.convergesolution.com
+1 732.516.8233 | +91 77780 59923